

Case Study

**Upland Panviva
increases
accuracy
across a bank's
international
operations.**



INDUSTRY

Financial Services

COMPANY

Regional Bank

The offshore hub of a large regional bank manages all high-value commercial and institutional transactions, deposits, and lending. They have a team of over 750 people located in several countries working on complex multi-currency transactions, using more than 50 system platforms.

Regional Bank used Upland Software's Panviva, the bank stays ahead of perpetual process and content changes. Now, guidance is easily findable and easy to follow.

How can you modernize an outdated, complex system?

Accessing and updating knowledge was difficult and time-consuming.

Limited search functionality in the bank's existing central repository left users spending too much time looking for information. Employees unfamiliar with their search subject had to fall back on guesswork and trial and error.

To alert staff to process updates and document changes, the bank sent long emails that often included multiple changes for multiple teams, leaving employees scrambling to figure out which information was relevant to them. Then, they'd rush to implement any immediate changes.

Updating content was also manual and time-consuming. Even a minor wording change took several days and introduced inherent risk, as there was no way to ensure that all impacted collateral across every site had been identified and updated.

A streamlined approach makes information accessible and consistent.

Bank employees now have access to context-specific search and easy navigation, while content owners can make universal, real-time updates across hundreds of documents at the click of a button.

"The response from our end users has been overwhelmingly positive. Panviva's browser-based style presents information in a way they are familiar with, making the guidance it provides very easy to follow."

Guidance through Upland Panviva creates high-performance teams

Success began within weeks.

The bank selected Panviva because the software resolved primary issues they were looking to address and provided additional benefits that supported key long-term business goals.

"Within weeks we had converted long, complex documents with hundreds of thousands of words into succinct and precise banking procedures in Panviva," says the bank's spokeswoman.

An enthusiastic response.

"The response from end-users has been overwhelmingly positive," says the bank's spokeswoman.

The simplicity and intuitiveness of Panviva's context-specific search mean that staff from any area can quickly find information and accurately complete tasks to maintain compliance. Easy navigation and the consistent structure of Panviva content also enables new hires to learn on the job, reducing the need for lengthy, expensive, training and cutting time to compliance. This also allows management to easily move staff into new roles to meet business cycles and unexpected customer demands – or provide fresh career opportunities to senior staff.

"The 'News and Alerts' page pops up as soon as users sign-in to Panviva, ensuring important team updates are never missed. This has significantly improved employee

morale and engagement as they feel the bank has listened to their feedback and made an investment to help them get their jobs done more efficiently," the bank's spokeswoman explains.

Content owners have reported significant savings with Panviva. Changing a word, even one that appears in several thousand instances across hundreds of process guides, is now an easy task. Everything is updated in real-time within seconds, which ensures strict consistency across every location.

Results for Regional Bank

increased

Employee performance

reduced

Errors and risk

shorter

Time to competency