

Case Study

**MoneyMe
streamlines
internal
information
sharing utilizing
Upland Panviva.**



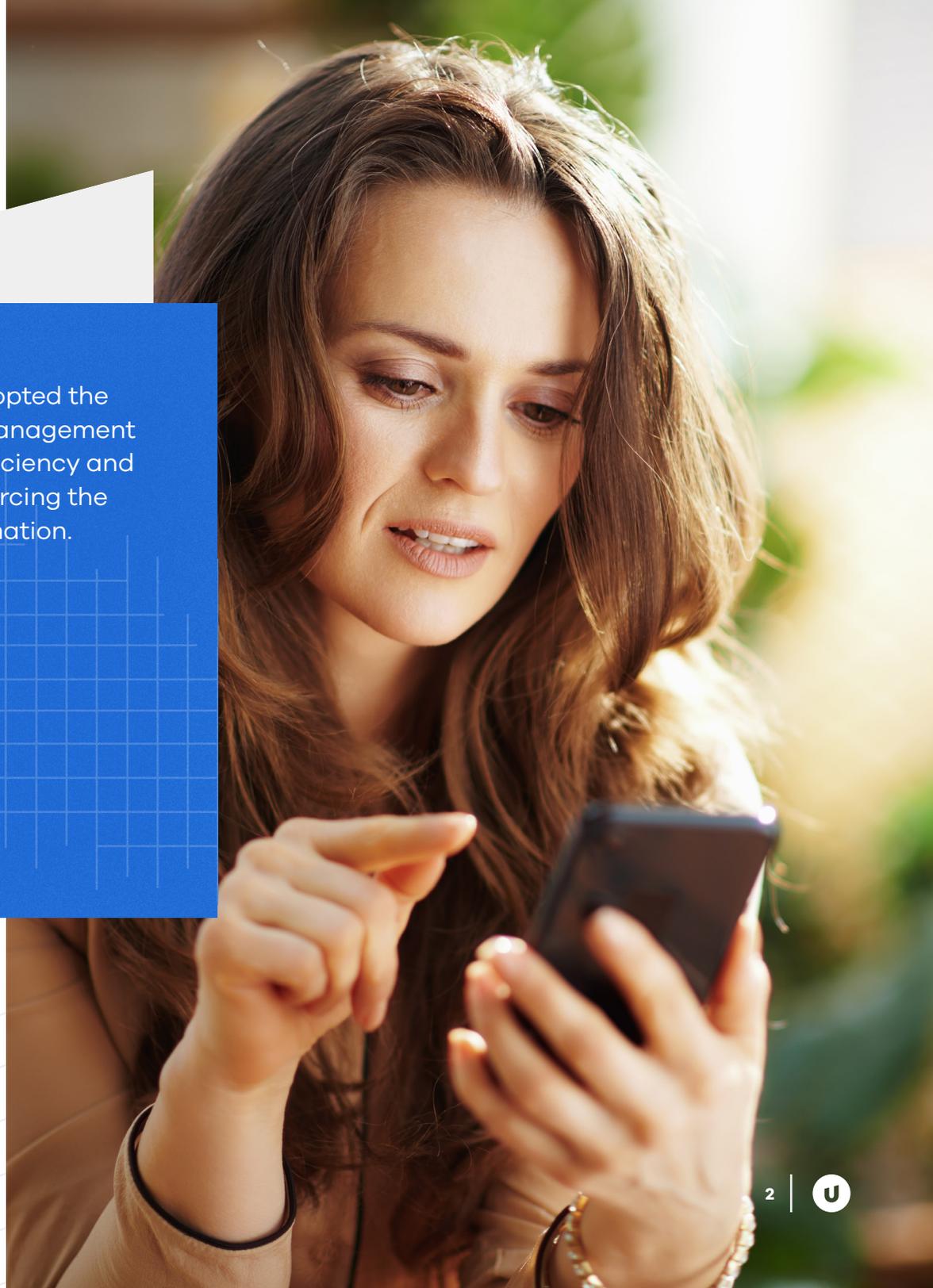
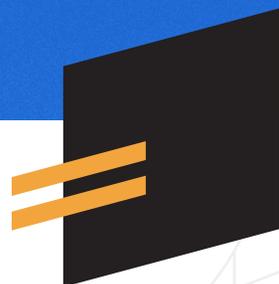
INDUSTRY
Financial Services

COMPANY
MoneyMe
Melbourne, Australia
moneyme.com.au/

MoneyMe is a digital finance service provider targeting Australia's tech-savvy 'generation now' with their fast and easy credit and financial service products.

moneyme

MoneyMe recently adopted the Panviva knowledge management system to increase efficiency and reduce time spent sourcing the correct internal information.



How do you train employees quickly while ensuring compliance?

MoneyMe came to Upland Panviva looking for a long term, time-saving solution for their internal operations.

During its rapid growth, MoneyMe uncovered a need to evolve and streamline internal processes to keep pace within this dynamic, fast-moving industry, while also being able to effectively manage the accuracy of information being shared throughout the company.

With 50 new employees all undertaking their training and onboarding remotely via conference calls, there was little opportunity for face-to-face collaboration and discussion. This resulted in an influx of questions from new staff seeking correct information and clarity. The risk of these internal questions going unanswered, or a potential lag in response time, could easily result in employees feeling unequipped to effectively deal with customer queries.

Fast-tracked training using a single source of truth.

Through Upland Panviva's knowledge management system, MoneyMe has been able to quickly and easily send team members correct and up-to-date information, minimize the number of internal questions received, and decrease the amount of time spent each week on team training and onboarding new employees. By spending less time on manual, one-on-one training, managers are now able to dedicate more time working on key projects that further advance the business, and prioritize their clients' needs.

"It has been really easy to work with Upland Panviva. The resources they provided us with were great and we were able to easily get in contact with the team for seamless integration. After utilizing their knowledge management platform, we've noticed a visible decrease in how many questions are received from new team members. Utilizing the important updates section on the homepage has allowed us to share critical business updates."

– Jake

Informing teams to provide a better customer experience.

Long-term change for long-term success.

It's critical in the Fintech space when processes and products are evolving so rapidly that employees have access to a central repository for knowledge. This ensures they are meeting strict regulatory requirements and clearly communicating information to customers—all readily available at their fingertips, with the ease of clicking a button.

Informing teams to provide a better customer experience.

With Panviva as a single source of truth, MoneyMe has been able to minimize the number of training sessions needed to keep employees up to date. They can now conduct a single 1-hour training

session with key members and share the information company-wide, eliminating the need for further training or questions.

The MoneyMe team was impressed with the fast adoption rate of the tool throughout the workplace and its ability to bring everyone together in accessing the correct information. The system implementation has already gained positive feedback from the internal team as they further build their business knowledge, and confidence to relay the correct information to their customers.

One of the additional long-term benefits MoneyMe has seen emerging is the beginning of behavioral change within the organization. Employees are happily adopting the habit of consulting the

Panviva knowledge management system as their first point of reference. If an information gap is identified, it's then escalated to management, who can then upload the relevant information and communicate it to the entire company. This feeds a continual information-sharing loop and drives collaboration where it can make a difference.

Panviva's technology implementation was seamless.

The intuitive design means that Panviva sits alongside MoneyMe's current CRM, guiding employees through each customer journey. Delivered via a simple overlay, there was no need for complex integration, making the rollout seamless for the entire organization.

Results for MoneyMe

Faster response times

Shorter training time

Greater autonomy by new hires

For more information visit: uplandsoftware.com/panviva

Upland helps global businesses accelerate digital transformation with a powerful cloud software library that provides choice, flexibility, and value. Our growing library of products delivers the "last mile" plug-in processes, reporting, and job specific workflows that major cloud platforms and homegrown systems don't provide. We focus on specific business challenges and support every corner of the organization, operating at scale and delivering quick time to value for our 1,700+ enterprise customers. To learn more, visit: uplandsoftware.com