



Struggling to keep your workforce aligned and operating at peak efficiency?

Upland Panviva powers your contact center by keeping your agents confident and compliant.



Make your operations seamless

Your industry is complex. With processes that are impossible to follow, regulations that are constantly changing, customers becoming exceedingly frustrated by losing out on their dream homes, and more... Your agents are stressed trying to keep up. This is where Panviva comes in.

Guided Navigation: Follow along the guide-on-the-side and receive seamless change notifications.

Compliance Confidence: Customized knowledge delivery based on employee roles, locations & security clearance, ensuring compliance with complex banking regulations.

Intelligent Recommendations: AI-driven features that offer personalized recommendations that guide agents to the most relevant knowledge resources.

Fast Tracked Learning: Test your agent's competency in real time with comprehension quizzes.

Streamlined Collaboration: Allow agents to share insights that improve knowledge acumen and team efficiency.





Panviva is trusted by leading banking organizations

We know your industry, we know your problems, we know how to solve them.

How Panviva reduces time to competency for this major bank

"We've got to bring in good talented people that may come from different industries, so there's a steep learning curve. When we talk about training for a contact center, it's all about speed to competency..."

I find it's extremely helpful for our training team to be able to show them not only the 'what' and the 'how', but to show them where to find it. It takes a lot of pressure off agents when it comes time to move out of the training room. They know if there isn't something they've memorized that they can go to their knowledge base and reduce their stress."

Steve Belt,
VP, Director Digital Delivery & Support, Salem Five Bank

Complex Compliance Made Easy

- | Real time alerts for important regulatory updates
- | Seamless content updates with workflows and audit controls
- | Analytics & insights to track process adherence

Reimagined Training & Support

- | Test your agent's competency in real time with comprehension quizzes

AI Powered Agent Assistance

- | AI recommendations that guide agents to the most relevant knowledge
- | Integrate with CRM, Telephony & Live transcript to save time searching
- | Feed virtual assistants & chatbots from a single source of truth

Results

- | 50% reduction in Home loan Support Staff
- | Increase in NPS
- | Reduction in complaints and process rework



For more information about Upland Panviva visit

uplandsoftware.com/panviva/knowledge-management-for-financial-services-firms/