



Solution Overview

Panviva Benefits

- Delivers fast results and rapid ROI
- Reduces errors, mitigates risk and promotes compliance
- Slashes training and induction times
- Accelerates staff productivity
- Cuts operating costs
- Improves customer and employee satisfaction
- Promotes staff multitasking
- Delivers content to almost any device or browser
- Blends seamlessly with your existing technology framework
- Non-disruptive upgrades and feature enhancements
- Pay-as-you-go licensing so you only pay for what you need
- Flexible, cost-effective provisioning that makes it easy to scale usage to meet ongoing changes to user numbers

Executive Overview

Panviva is a Cloud Knowledge Management solution that makes it easier for front-line and back-office employees to perform their jobs right – first time, every time. It offers real-time navigation that guides knowledge workers through complex policies, procedures, and systems, dramatically improving efficiency and accuracy while simultaneously cutting costs and training times.

With Panviva, users can quickly and accurately navigate and access multiple applications, different types of information sources, and critical regulatory procedures. Knowledge assets are captured, optimized, and delivered to employees at the very moment of need. And best of all, Panviva doesn't replace existing enterprise software and business processes – rather it adds greater value to these systems by allowing staff to work with them in a more efficient and productive manner. As a result, Panviva reduces training and time to competence, increases throughput and accuracy, increases employee engagement, and ultimately improves the customer experience.

Panviva combines knowledge management, performance support, and guided navigation into a single system to improve worker performance. It delivers instant support by enabling businesses to quickly manage complex processes and procedures. It also ensures process compliance and enhances customer engagement by providing relevant, moment-of-need business information that increases customer care and lifetime value.

Panviva offers a revolutionary new approach to dealing with growing complexity – the single greatest inhibitor of business performance today. Increased competition, customer expectations, and regulation mean that businesses have become incredibly complex, requiring countless new and ever-changing policies, procedures, and processes.

Panviva is a breakthrough solution to this problem, enabling you to:

- **Capture** and define your organization’s policies and procedures based on employees’ roles. What does an employee need to know to complete a task that falls to their role?
- **Optimize** comprehensive guidance in the form of text and diagrams that communicate these policies and procedures in clear terms that the employee can act upon quickly.
- **Deliver** only the most relevant parts of this guidance to employees according to their role and the task they are working on at their moment of need.

Capture, Optimize, Deliver

The Panviva platform uses a proven methodology when managing knowledge for its customers. Panviva’s Cloud-based software captures content, information, and processes, optimizes workflow and tasks, and delivers an unparalleled customer experience from agent to back-office.

Capture. Panviva captures content for complex processes and procedures, document updates,

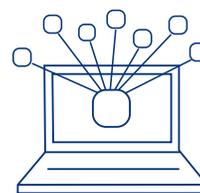
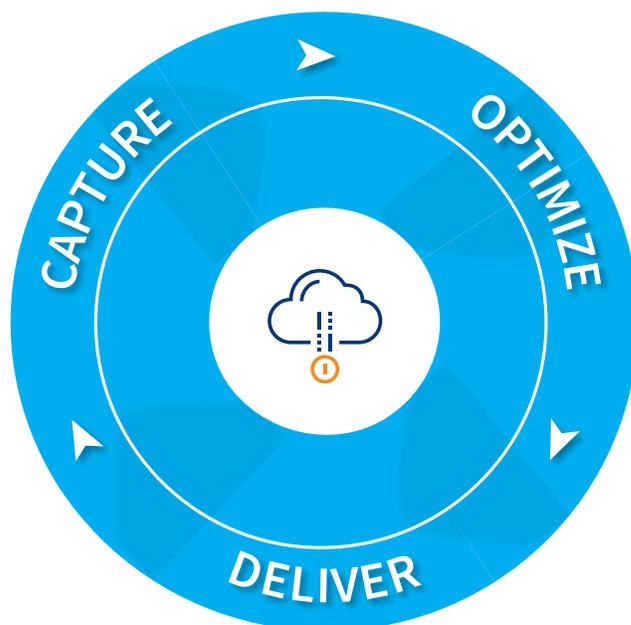
changes to rules and regulations, and new and ever-changing content.

Optimize. By optimizing content accessible only to those who need the information, routine tasks are more accurate and easier to manage. This reduces the number of open applications on the agent’s desktop and eliminates aimless searches for answers. All of this allows for multichannel knowledge asset management.

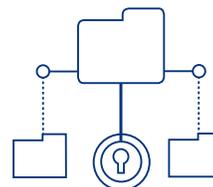
Deliver. Panviva delivers context-aware information in the moment of need, eliminating unproductive searching and deciphering time traps. This helps the entire team become experts and opens a feedback loop to keep content updated and accurate.

Panviva acts as your organization’s “Single Source of Truth.” It seamlessly navigates your knowledge workers through any process – no matter how detailed or complex – across multiple systems, applications, and departments.

The Cloud-based solution is a fully managed, subscription-based service with rapid implementation at a low cost. Panviva delivers fast results and pays for itself within the first year of implementation.



CAPTURE



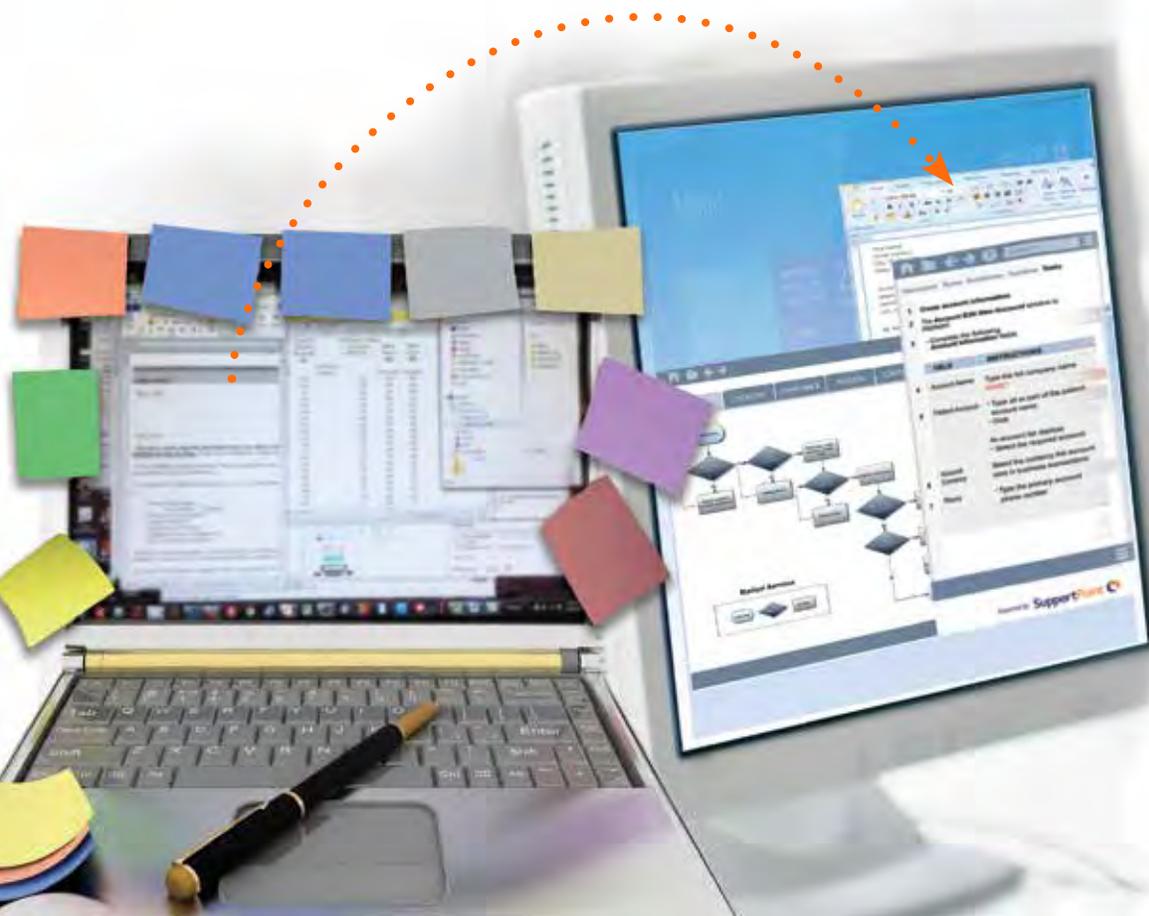
OPTIMIZE



DELIVER

Panviva Business Benefits

- **Performance Improvement.** Employees don't have to rely on their memories. Panviva guides them through tasks quickly and more efficiently.
- **CX Advantage.** Employees work confidently across multiple, complex systems and processes to accurately resolve customer enquiries. This improves customer satisfaction and creates more loyal customers.
- **Knowledge from everyone, for anyone.** Content producers and authors do not need to be specialists. Anyone can easily create, maintain, and update process documentation without lengthy training – and the built-in review and approval mechanism ensures stringent control and auditing.
- **Risk Mitigation.** Employees work consistently and accurately, complying with industry and government regulations guided by up-to-date data and directions.
- **Speed to Competency.** New hires are guided by best practices from the start, and learn on the job. This removes the need for lengthy training.
- **Productivity Increase.** The powerful, context-specific search function improves self-service, lowering supervisor-to-staff ratios.
- **Cost Reduction.** Errors are eliminated as employees are prompted to follow the right process and use the right information for every step of a task. This enables a multi-skilled workforce and greater talent utilization, reducing staffing needs without affecting service levels.
- **Higher employee engagement and satisfaction.** Employees provide instant feedback directly to content owners, which significantly speeds up the fine-tuning of processes, reducing employee frustration and increasing staff retention.



The efficiency gains that come with Panviva's streamlined information search and display can save your organization not only thousands of work hours, but also millions of dollars.

Panviva Functional Overview

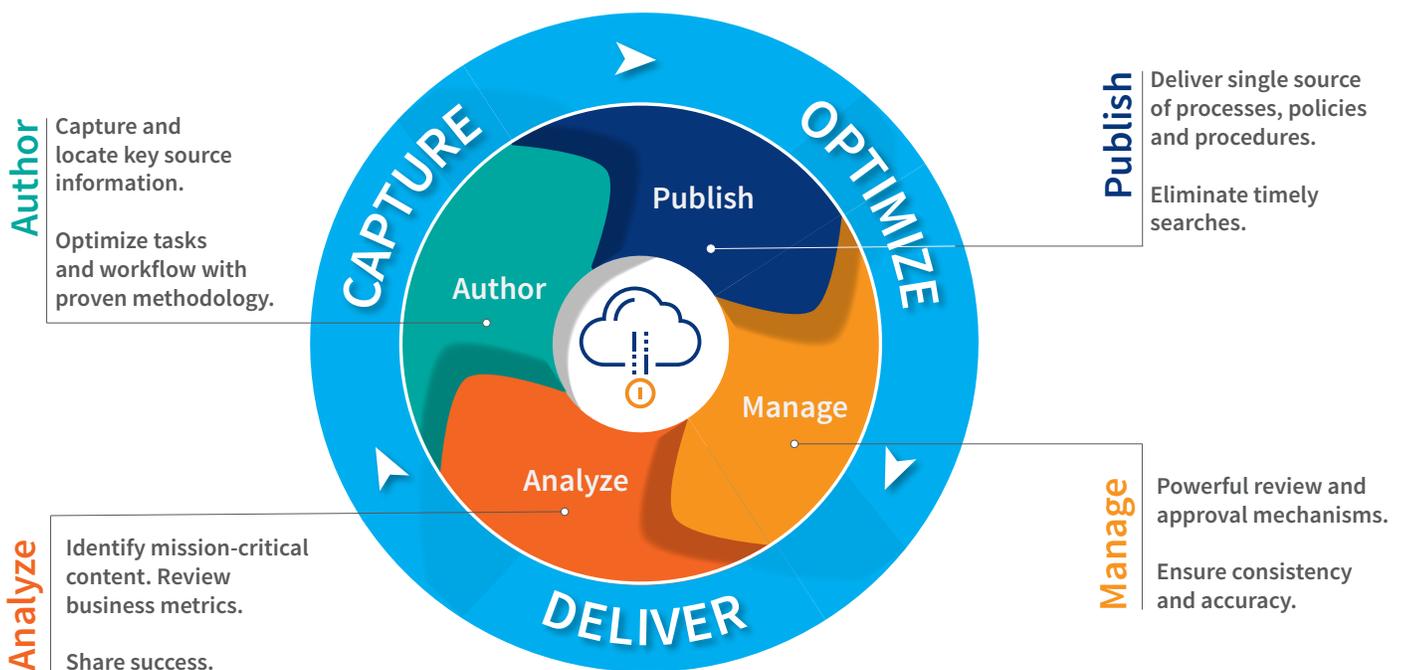
Panviva is a secure, scalable platform that guides users step by step through their work. It is a lightweight, high-performance content creation, management, and delivery tool that floats on top of your other applications and information sources, providing end users with fast access to the information they need to perform their jobs well. It recognizes their identity and role, and where they are in the process, by identifying which screens are open on their desktop. It uses this “context” to deliver the right information to guide them through the process. There’s no need for your staff to be searching through mountains of information on company intranets, looking over documentation in their applications, wading through printed manuals, or asking colleagues for assistance. Everything they need is presented to them intuitively – quickly and accurately.

Let the Cloud do the heavy lifting. Built on a highly reliable SaaS platform, Panviva incorporates all the advantages of Cloud technology, including flexible deployment, scalability, lower costs, and easy integration with other systems. Fast setup with very little IT investment lets you get started in days.

Deliver the exact information needed. Panviva lets you store the information your company depends on for efficiency, effectiveness, compliance, and customer experience, all in a single, safe place. It manages content and delivers it in real time based on a user’s role and task. The system also logs every action, providing a complete audit trail and enabling you to examine content usage for new efficiency gains.

Consistent content development and management. Subject matter experts can quickly capture critical business information and keep it up to date with the Panviva authoring tool. The WYSIWYG tool is as easy to use as Microsoft Word – requiring no technical skills or IT involvement – giving process owners complete control over the information critical to their staff’s performance. Templates, automatic localization, and powerful review and approval workflows ensure consistent information delivery across your business.

Click once for context-aware guidance. The Panviva Viewer is a client application that sits on top of your other business applications on any device. Whenever a user needs help, they click, and Panviva immediately presents the just-in-time information your staff needs to do their work right.



Unlike any other solution on the market, Panviva is role-specific and context-aware. It knows exactly who the user is, their role, and what they are trying to do based on open desktop screens.

Panviva incorporates many of the innovative principles and practices associated with state-of-the-art knowledge management, performance support systems, intranets, portals, and collaborative tools. Panviva offers a solution that solves many of the problems inherent in these traditional systems.

Panviva provides a flexible and dynamic solution to deal with the rapidly changing products, processes, and procedures found in complex work environments. It acts just like a GPS for the enterprise desktop – it determines an employee's location in a task and provides step-by-step help, guiding them through even the most complicated tasks in the fastest and most precise way possible.

Context Sensitivity

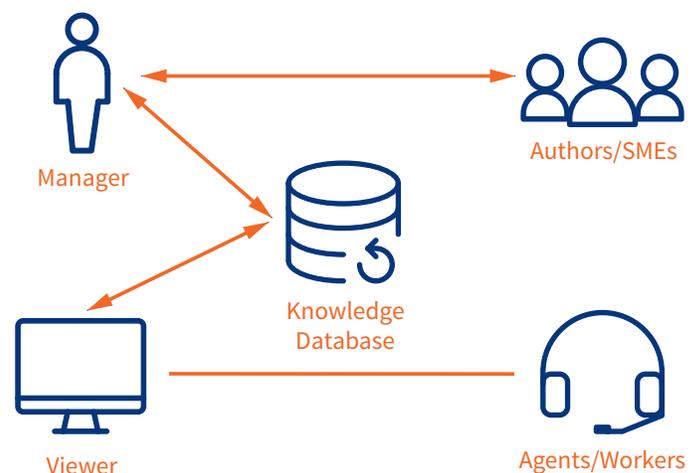
Unlike any other solution on the market, Panviva's guidance is role-specific and context-aware. It knows exactly who the user is, their role, and what they are trying to achieve, and responds with fast, accurate instructions. By identifying where a team member is in a process, Panviva delivers the knowledge they need at that moment – specific to them and their task at hand. This innovative context sensitivity is quick and easy to set up and maintain, without any coding or technical integration.

Panviva's Context Sensitive Guidance technology reduces the need to search through large amounts of information. When the user clicks on the Context Sensitive Help (CSH) icon, Panviva detects which task the user is working on and where they are in that task. It then delivers only the most relevant instructions based on the user's role and where they are in the process. CSH provides fast access to specific guidance by associating Panviva documents to third-party application screens. When the user requests CSH, Panviva examines the user's PC for the currently running applications and displays documents with matching context sensitive keywords.

Content Development, Management, and Usage

Panviva is a complete and self-contained system that covers content creation and publication, content management, and content delivery, with powerful usage tracking and analytics. Content creation and online publication are as easy as using Microsoft Word, with no technical skills required. You can create many versions of content, translate it into any language, and enable a strict workflow for review, approval, and release of content.

Your content is stored securely in a relational database – providing a single, safe source for the information that your organization depends on. And Panviva logs everything, so you can report on content usage and the most common search terms, as well as offering a complete audit trail of all content changes. Panviva is delivered in a unified content management interface with three user types: Authors, Editors, and Viewers, assigned as needed.



Panviva Viewers can access and leverage the content, processes, and procedures based on their assigned roles.

Panviva Author lets your subject matter experts and content developers create and maintain content with a powerful, non-technical authoring environment. It enforces strict styles and standards so that users see consistent material.

Team members that are responsible for content management and role management will require access to Panviva Author.

Panviva Editors are often subject matter experts that participate in the content development process but do not require full document creation or final publishing capabilities.

Why content creators chose Panviva:

- **Context sensitive.** Easily create context sensitive links that work out-of-the-box with most applications, including green screen legacy systems, without requiring technical expertise or IT.
- **Global find and replace.** Change words or processes across multiple documents in real time, in just one action. This streamlines the update process and enables timely distribution of information.
- **Simple to use.** The WYSIWYG editor interface is as easy to use as Microsoft Word.
- **Side-by-side comparison.** Identify content additions, modifications, or deletions quickly with side-by-side comparison of documents – including easy roll back to previous versions.
- **Document versioning and notification.** Receive full revision history for audit purposes, and automatic notification of content updates.
- **Content governance.** Ensure adherence to review, approval, and release workflows that support end-to-end company, industry, and governmental policy and governance controls.
- **Role-management function.** Personalize content to specific user roles so that users are presented with information that is most relevant to their task.
- **Powerful analytics.** Track content usage and common search terms to identify and support the enhancement of guidance materials and business processes.

- **Seamless localization.** Tailor content to meet the needs of specific regions, business units, or application versions – and create and display content in any language, including multi-byte and right to left languages.
- **Consistent presentation.** Improve staff productivity and accuracy with templates and reusable content specifically designed for easy scanning.
- **Effortless collaboration.** Refine guidance materials by enabling all end users to rate materials and provide feedback directly to content owners or creators.

Configuration and Reporting

Panviva management facilities provide a range of tools, including:

- Reports and analytics
- Audit trail and compliance history
- User and role details

Panviva provides a full audit trail on all end user content access and author content changes, supporting the ongoing improvement of your organization's business processes.

Summary of Panviva Features & Benefits

Whether you're facing complexities in the front or back office, Panviva will help your business improve productivity, cut costs, mitigate risk, and achieve greater customer satisfaction rankings. Results are immediate, as staff can turn their focus to providing higher quality work, rather than wasting time trying to remember process steps. The efficiency gains that come with Panviva's streamlined information search and display can save your organization not only thousands of work hours, but also millions of dollars.

Key features include the following:

- Integrates functionality of knowledge management, performance support, and guided navigation into one turn-key system.
- Templates and reusable content allow consistent delivery of information across large and dynamic content repositories.
- Document versioning, change history, and analytics provide a full audit trail.
- Context sensitive guidance can be tied to virtually any application.
- The knowledge base has robust content versioning and context sensitivity, allowing information to be accurately targeted to end user needs.
- Increases compliance capability through enhanced staff knowledge and error reduction.
- Enables cross- and multi-skill training across call centers and back-office departments.
- Preserves institutional knowledge in customer care, marketing, and back-office functions.
- Industry-specific content and applications, including healthcare (payers and providers), banking, insurance, and telecommunications.
- Powerful search functionality – fast access to all relevant, useful information.
- Consistent presentation – content is presented in an easy-to-scan format designed to facilitate rapid online reading that doesn't disrupt your user's workflow.
- Context aware functionality enables speed of information retrieval, understanding, and training (while filtering out noise).
- Includes secure online content creation and publication capability, content management, and online delivery, with powerful usage tracking and analytics.
- Integrates training information for user education and learning.
- User interface sits on side of screen for easier access to relevant information without obscuring primary application screens.
- Includes customizable visual, icon-based interface. WYSIWYG interface simplifies content creation and maintenance – it's as easy to use as Microsoft Word.
- Powerful review and approval workflows support content governance.
- Customization – Panviva's multilingual capabilities let you address the needs of a diverse global user base, including multi-byte Asian languages and right-to-left languages (Arabic and Hebrew).
- Feedback and notification mechanisms promote continuous improvement to your business processes and the way you use Panviva. End users can provide feedback directly to authors and receive automatic notification of content changes.
- Content Converter allows content to be created in predefined Microsoft Word template and easily converted to Panviva's format.
- Cloud-based managed application service provides deployment and pricing flexibility.

Key benefits include the following:

Accelerate productivity.

Panviva drives your staff quickly and effortlessly to the precise answers they need to do their jobs. This slashes average call handling times, reduces error rates, and improves first call resolution. Escalations and transfers are minimized, as Panviva does the thinking for your agents so they no longer have to guess, search for answers, ask a supervisor, or rely on their memory.

Revitalize your workforce.

Panviva promotes a stress-free working environment and greater confidence across your teams by empowering staff with the tools they need to perform their jobs well. Employees will be happier and more engaged as they spend less time in training, and more time developing their customer service and business skills.

Provide greater customer satisfaction.

Panviva arms your staff with everything they need to provide unrivaled service excellence to all customers. Agents can deliver concise, accurate responses – first time, every time – leading to greater customer confidence and improved customer service rankings.

Guarantee best practices.

Panviva protects your business from compliance breaches that can lead to severe financial penalties and loss of reputation by simplifying and centralizing procedures, which, in turn, promotes greater accuracy. Panviva makes it easier for staff to adhere to industry regulations by immediately presenting on their screens all the required information, forms, and reference materials they need to work their way through a task.

Reduce training time and cost, improve training and efficiency.

When your people have instant access to the information they need to do their jobs, they don't have to remember all the details, which results in less time training them to be effective. Reduced training time means reduced cost. And where staff turnover is high, this becomes a major efficiency driver.

Reduce time to competence.

With reduced training time, your new recruits are on the job and effective more quickly, and they learn by doing as they follow the guidance provided by Panviva. If your organization experiences high staff turnover, the benefits of reduced time to competence can be a game changer that flows directly to your bottom line.

Reduce error, rework, and escalations.

When your employees have instant and context sensitive access to the information they need to do their jobs right the first time, every time, they make fewer errors that require costly rework. And they become effective contributors who make fewer requests for assistance. With fewer errors and reduced escalations, cost goes down and customer satisfaction soars.

Improve process and regulatory compliance.

In many organizations, a 'slip of the tongue or the pen' can be catastrophic. Insurance, banking, healthcare, and many other industries are highly regulated and need to show that not only do their employees act compliantly, but that the organization provides the means for them to do so. Panviva's comprehensive audit trail and analytics give organizations the ability to achieve and prove adherence to their compliance requirements.

Flexible deployment.

Panviva uses internet-based technology on the desktop and requires nothing further to be installed, so you can be up and running faster than ever before. With desktop installations no longer required, your organization will benefit from enormous IT administration savings and minimal business disruptions caused by system upgrades.

Grow with your business.

Panviva's enterprise-level scalability not only offers a high availability solution for today, but one that will continue to meet the evolving demands of your organization. Its modular design also allows for faster access to the latest product innovations, with new or enhanced functionality being easily added as an extra module, without the need to upgrade

your entire Panviva system. And if you need to add an extra 50 user seats by tomorrow – whether for the long term or just a few months – with Panviva Cloud we can make it happen instantly and affordably.

Device independent and mobile ready.

Panviva is written in HTML 5 so it can display content on virtually any device or browser. The optimized user interface fully supports new design standards and navigation modes, ensuring that it translates seamlessly from PC to tablet to smartphone. Field workers, mobile-enabled employees, and customers can have instant access to the same information, no matter where they are

How does Panviva relate to SharePoint for knowledge workers?

SharePoint is a powerful collaboration and information sharing platform that's great for

facilitating project work in corporate environments. However, SharePoint is not designed to provide rapid access to actionable guidance through time-critical and complex policies and procedures. There are thousands of these mission-critical processes within complex, changing, and regulated industries like banking, insurance, health care, life sciences, and telecommunications.

Organizations that want to support their employees in this way can, in theory, build out this capability in SharePoint – but it requires a lot of time and money without achieving a significant outcome.

SharePoint and Panviva are not mutually exclusive. In fact, they are a great combination, with content in one system readily accessible from the other. And Panviva can certainly guide your employees through business processes they are working on within SharePoint.

Panviva

- Contextually relevant. Identifies where every user is in their work and provides the most relevant guidance for that specific task.
- Role-centric. The guidance that an end user sees is determined by their role.
- Single format support. Guidance is presented in a highly structured and consistent format optimized for providing clear, actionable support within a workflow. Information is presented in a narrow window that runs along the right edge of the screen, side-by-side with the applications that are being supported on the desktop.
- Built-in mechanisms for continuous improvement. Panviva constantly expands its process guidance capabilities, such as real-time alerts for content changes, feedback mechanisms between end users and content developers, easy content authoring and maintenance for subject matter experts, non-technical processes for creating context sensitive linkages, and much more.

SharePoint

- Keyword dependent. Relies on keyword searches, which can generate out-of-date or irrelevant results.
- Process-centric. Users often need to wade through information that does not apply to them.
- Multiple format support. Guidance is presented as MS Office documents (Word, PowerPoint, etc.), PDFs, or web pages. Because these formats are unstructured, they result in multiple styles and standards that hamper fast access and interpretation of information. Information is presented in full-screen mode, covering the applications in use.
- Custom mechanisms for improvement. Guidance-specific capabilities are ad-hoc and often require significant development effort to implement.

Panviva, the Company

Panviva was founded in Melbourne, Australia, in 1996 as a professional services company focused on content development for large organizations. The founders had extensive experience in content publishing and instructional design, and formed the company to apply the principles of those disciplines to solving information challenges for corporations.

Panviva emerged from a driving desire to give employees one-click access to the information they need, when they need it and in the context they need it, to do their jobs right the first time - thereby dramatically reducing the need for training. Today, Panviva is helping companies worldwide solve their most complex information access problems, serving up just-in-time information to more than 300,000 users around the globe.

The company undertook research and development to understand the problems that customers encounter in using intranets, file systems, and document management systems to deliver the information that call center agents and other personnel handling complex workflow applications require to do their job. They also conducted primary research into how to deliver information to those workers to support them as efficiently as possible. Utilizing the best practices of instructional design and technical implementation, the company developed a highly effective way of structuring information. They then developed the Panviva software to deliver this structured methodology online as an enterprise application. Most applications that attempt to solve these information challenges for corporations do so by retrofitting software to the information. Panviva is the first and only company to study and fix the information problem at its root, providing a unique content delivery system that dramatically raises worker accuracy and efficiency while it lowers costs. The first implementation of Panviva occurred in 2000 to support users of a large-scale SAP implementation.

Panviva's Performance Support Philosophy

Panviva's performance support philosophy focuses on meeting the requirements of the two key constituent groups: end users and content creators – authors and editors.

End users

For end users, Panviva believes content needs to be easily accessible while performing the task it relates to, and it should display in such a way that it does not interrupt it or “get in the way” of performing that task. It should “blend in” to become part of the workflow. Panviva's design is synonymous with a GPS unit – it knows who the worker is and where they are in any application, and displays the instructions and answers to the worker without them needing to divert from the customer engagement or customer satisfaction.

Authors & Editors

We believe that creation, management, and publication of content needs to be done by the people who own the processes and support worker success, without the need for IT coding, skills, tools, or support. Authoring must be easy for any subject matter expert, and support sophisticated content management needs. This means Panviva is “industrial strength,” providing the content management functionality expected of large organizations that have complex business processes, myriad content, and many systems. Much of this system intelligence is automatic, unburdening staff of complex training.

Input from users is vital to continuous improvement. Authors need to know what's happening, and the system should encourage and enable input and feedback from the end users of the content. The system should also provide a full audit trail of all content, its access, and all content maintenance – as well as of approvals for sensitive content – as usage data is often an important factor in optimizing content, proving regulatory compliance, and continuously improving performance and customer satisfaction.

Decreased number of clicks to information, from 45 to 5 – *Large National Bank*

“When Panviva was used to train and support agents on a new implementation, there was not a single call to IT support from the customer service environment, and that is extraordinary. In contrast, when a new process was not documented in Panviva, IT support was inundated with calls.”

83% reduction in compliance breaches – *Large National Bank*

“The productivity gains with Panviva ensured higher returns on our investment in SAP, greater compliance on the part of employees with policies and procedures, and fewer man-hours lost to rework.”

50% reduction in new hire training times and 40% reduction in agent failure during probation

– *Cable Company*

“As staff are now more comfortable using Ellipse, due to both the training they received and the online knowledge function of Panviva, we have noticed a decrease in people developing their own systems and processes outside of Ellipse.”

75% reduction in escalations to internal help desk – *National Health Insurer*

“Panviva has increased the level of confidence that representatives have when they give an answer. . . So the health plan member feels, ‘Yes I got the answer, the representative knew what they were talking about, I don’t feel the need to call back and see if I get a different answer.’”

Error rates reduced to just 6% across 20 countries – *Major Telecom*

“Panviva is a key element in our aim to be number one for customer service. Not only has Panviva almost completely reduced our error rates, but it’s helping to bring in more revenue, faster.”

132% increase in calls answered within 30 seconds – *Health Plans*

“We are a very customer-centric organization, and Panviva allows us to provide a better outcome for our customers. We can hire agents with great people skills instead of great memories and now use our training time for soft skilling and cross skilling instead of memorization. This is much more efficient for us and more service focused for our customers.”

60% reduction in training times

– *National Health Insurer*

“Now whenever we find information that is generic across several areas, we make one document and release it in Panviva. The departments still have ownership of the information, but we develop and maintain it centrally and make it available to everyone whose role permits them access.”

26% decrease in agent attrition

– *National Health and Wellbeing Provider*

“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 organization has listened to their feedback and made an investment to help them get their jobs done more efficiently.”

Panviva is a cloud knowledge management system used by organizations to access critical information and improve employee efficiency. Panviva combines a proven methodology with its cloud-based software ensuring employees are delivered the information they need, the moment they need it, to solve real business processes. For more information, visit www.panviva.com



www.panviva.com | **email:** usinfo@panviva.com

United States: +1 (617) 270 1569 | Australia: +61 (0)3 9225 1800 | United Kingdom: +44 (0)1757 638 195

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