

Use Case: **Succession Planning**

Don't lose what your senior people know.

The problem. Your most experienced people carry decades of institutional knowledge. They know which approach worked on the difficult job. They know which vendor is reliable. They know the unwritten rule that keeps a process safe, the historical context that explains a decision, the precedent that should advise the next action.

Most of that knowledge has, in fact, been captured. It's in the files those experts created over their careers — design narratives, memos, reports, correspondence, reviews. It lives on Panzura CloudFS. The problem isn't that the knowledge wasn't recorded. The problem is that no one else can find it.

When senior people retire or move on, the next generation can't ask them anymore. They can ask the file system. The file system doesn't answer.

The Panzura Nexus solution. Panzura Nexus makes the entire body of work your senior people have created searchable through natural language. The next engineer can ask the same questions they would have asked the retiring expert — and Microsoft 365 Copilot returns the relevant projects, documents, decisions, and rationale. Knowledge that used to live in one person's head is now accessible to everyone who has permission to see it. Permissions stay intact. The expert judgment is preserved in the work they did.

What it looks like in your industry.

Panzura Nexus enables intelligent, conversational interactions with your CloudFS files through the Microsoft 365 Copilot interface your teams already use.

AEC. Engineering judgment, design philosophy, vendor relationships, and project lessons accumulated by senior practitioners over decades become accessible to the next generation through the work they've documented across thousands of projects.

- *"How has the firm historically approached foundation design in expansive soils?"*
- *"What design considerations have our senior engineers applied to retrofit projects in historic districts?"*
- *"Show me the firm's track record on pursuit-to-win conversion for federal infrastructure work."*
- *"Find lessons learned documents from projects led by senior staff who've recently retired."*

Manufacturing. Process knowledge, supplier relationships, quality judgment, and the unwritten history of why decisions were made and how resides in the documentation senior engineers have produced across product versions and process changes.

- *"How has the firm solved recurring quality issues on this process in the past?"*
- *"What troubleshooting approaches have senior engineers documented for this equipment family?"*
- *"Show me prior root-cause analyses on yield variance in this line."*
- *"Find the rationale behind our supplier qualification decisions for critical components."*

Life sciences. Regulatory strategy, scientific judgment, and institutional memory of agency interactions reside in the documents that senior submission writers and program leaders have generated across product programs.

- *"How has the firm positioned similar mechanisms of action in past submissions?"*
- *"What regulatory strategies have senior staff used for breakthrough designation pursuits?"*
- *"Show me prior agency correspondence on this safety question."*
- *"Find scientific rationales we've developed for adaptive trial designs."*

Energy. Asset judgment, operational philosophy, and the historical context behind capital and lifecycle decisions live in the documentation senior engineers and asset managers have created across decades of plant and field operations.

- *"How has the firm approached lifecycle decisions for aging infrastructure of this type?"*
- *"What operational philosophies have senior plant managers documented for these units?"*
- *"Show me the rationale behind past major capital reinvestment decisions."*
- *"Find prior reliability analyses authored by retiring asset specialists."*

Financial services. Credit judgment, structuring expertise, and accumulated experience across cycles reside in the memos, post-mortems, and policy documents senior credit officers and portfolio managers have produced over their careers.

- *"How has the firm structured loans in this industry?"*
- *"What credit conditions have senior officers historically required for this borrower profile?"*
- *"Show me post-mortems on transactions from the last downturn."*
- *"Find the policy rationale behind our current concentration limits?"*

The outcome.

The judgment, philosophy, and accumulated experience your senior people have produced over their careers becomes accessible to the next generation through the documentation they've already created. Onboarding time compresses because new staff can ask the questions through Microsoft 365 Copilot, which they would have previously asked an expert, and get answers grounded in the firm's lived history. Departures stop becoming knowledge "cliffs". The next generation builds upon the prior generation's work instead of reinventing it. Panzura Nexus transforms the firm's institutional memory into a durable, distilled, and governed asset rather than a personnel risk that walks out the door every time someone retires.