Product Requirements Document

Template Intelligence Engine

AdvisoryAI Internal Platform

Document Purpose

This document defines the product requirements for the Template Intelligence Engine. It describes **what problem must be solved**, **what the system must deliver**, and **how success will be measured**. It intentionally avoids technical implementation details.

1 Background and Context

UK financial advisory firms are required to produce regulated client documents such as suitability reports and annual reviews. These documents must adhere to firm-specific templates that have been approved by internal compliance teams.

Each firm maintains multiple Word document templates. These templates vary significantly in layout, structure, formatting, branding, and compliance language. There is no standardisation across firms.

AdvisoryAI generates client-specific content for these documents. However, before generation can occur, each template must be manually configured.

This manual configuration process is the primary blocker to scale.

2 Problem Statement

Core Problem

Onboarding a new advisory firm is slow, expensive, and unscalable due to the manual effort required to configure Word document templates for AI-driven content generation.

2.1 Current State

- Firms provide multiple Word document templates
- Each template requires manual inspection and setup
- Engineers must identify static and dynamic sections
- Prompts and insertion logic are written per template
- Formatting issues require repeated fixes

2.2 Impact

- Approximately 4 hours required per template
- 20+ hours of setup per firm
- Engineering and delivery teams become bottlenecks
- Template changes generate repeated support work
- Business onboarding does not scale with demand

3 Goal and Vision

3.1 Product Vision

> Enable near-instant onboarding of advisory firms by automatically converting Word document templates into AI-ready templates without manual engineering work.

3.2 High-Level Goal

When a firm uploads a Word document template, the system should automatically understand the document and prepare it for AI-driven document generation.

4 Target Users

4.1 Primary Users

- AdvisoryAI delivery teams
- Internal onboarding and operations teams

4.2 Secondary Users

- Advisory firms, indirectly through faster onboarding

This product is internal-facing within the scope of the challenge.

5 Scope of the Solution

5.1 In Scope

The system must:

- Accept Word document templates from advisory firms
- Automatically analyse document structure
- Identify static and dynamic content sections
- Prepare templates for AI content insertion
- Preserve original formatting and branding
- Generate completed documents using mock data

5.2 Out of Scope

The system does not need to:

- Integrate with live CRMs or portfolio platforms
- Validate real financial advice
- Act as a regulatory rules engine
- Handle every Word edge case perfectly
- Provide a customer-facing interface

6 Key Product Requirements

6.1 R1. Zero Manual Template Setup

No engineering effort should be required per template.

- No manual Word XML inspection
- No hard-coded insertion paths
- No per-template custom development

6.2 R2. Automatic Section Understanding

The system must automatically identify:

- Static content that never changes
- Dynamic content that varies per client

This must work across paragraphs, tables, and varying section orders.

6.3 R3. Formatting Preservation

Generated documents must:

- Retain original styles and layout
- Preserve tables, numbering, headers, and footers
- Open cleanly in Microsoft Word

Visual fidelity is mandatory.

6.4 R4. Section-Level Generation Readiness

- Each dynamic section must be independently generatable
- Regeneration should be possible at section level

6.5 R5. Fast Iteration on Template Changes

- Template changes should not require engineering work
- Updated templates should be reprocessed automatically

7 Success Criteria

The product is successful if:

- New templates are onboarded in minutes, not hours
- Standard templates require zero engineering effort
- Generated documents visually match original templates
- The system demonstrates a credible path to scale

8 Constraints and Assumptions

- Mock data will be used for client scenarios
- Evaluation focuses on approach and design quality
- Accuracy should be high but need not be perfect
- Human review may exist but must not be required

9 Non-Goals

- Building a fully production-ready Word engine
- Achieving 100% automation accuracy
- Solving financial advice logic
- Covering all regulatory edge cases

10 Open Questions

- Confidence thresholds for section classification
- Minimal review or override tooling requirements
- Error surfacing and recovery mechanisms

Next step: System Architecture and Responsibilities (Engineering Design)