Current Content State: Part 1

Contents

Chapter 1. Overview

The analysis report is divided into two parts. The 1st part is a shortened version of the report that outlines the enterprise's goals, its starting position, the main documentation issues, and a conclusion explaining the proposed solutions and how they align with the company's objectives. The 2nd part provides a more detailed account of the approaches and decisions made. The 1st part is available in both English and Czech.

Chapter 2. Company goals

All decisions and actions must be directed towards achieving the enterprise's specific goals and strategic plans.

Based on discussions held during the Global All-Staff Meeting on 14 October and the CZ/SK Town Hall on 29 October, as well as during individual meetings, a brief overview can be presented of the enterprise's objectives for the period 2026 - 2028 and the methods chosen to achieve them.

Current enterprise state (as of 1 November 2025)

Current state reflects the situation which we can take as a starting point:

- 600 employees
- 90% of total revenue generated from existing clients (2025)
- 10% of total revenue generated from new deals (2025

Desired enterprise state (as of 1 November 2028)

The desired state defines the future condition the enterprise aims to achieve during the period 1 November 2025 – 30 October 2028, assessed according to the following criteria:

- 35% reduction in project implementation costs by 2026
- 6 new deals (DB) and 20 million in revenue from all new clients in 2026
- 50% reduction in project implementation costs by 2028
- Maximum of 800 employees across the enterprise by 2028
- Twofold increase in total revenue compared to 2025 levels
- 50% of total revenue generated from existing clients
- 50% of total revenue generated from new clients

Approaches to Achieving Enterprise Goals

In order to achieve above-mentioned objectives, company decided that certain steps must be undertaken:

- Restructuring of departments
- Elimination of communication gaps across all departments, with particular emphasis on collaboration between Product and Sales/Marketing
- Clear and consistent product definitions
- Faster and more cost-efficient project implementation
- Establishment of standardised processes
- Implementation of artificial intelligence (AI)
- Expansion of the partner network
- Development of a comprehensive knowledge base

There are three main strategic directions for achieving the enterprise's objectives: securing new client deals, reducing project implementation costs by shortening project timelines and lowering the required qualification levels of project teams, and providing enhanced support to existing clients.

Achieving the enterprise's objectives will be supported by closing communication gaps between departments and ensuring that sales, project, and customer support teams have access to sufficient information. Furthermore, since the contractual terms include providing clients with access to information via the DBOS Portal and training through 360 Learning, it is essential to ensure that existing clients are properly equipped with the necessary information.

Chapter 3. Our starting position

Over the years, the company has accumulated a substantial amount of information. Efforts have been made to create a shared information source accessible to all departments. However, these initiatives have taken place under real-world conditions rather than ideal circumstances, where each department faced an immediate need for information specific to its operations and could not wait for the development of a universal, widely accessible, and user-friendly information resource.

As a result, departments developed their own information sources tailored to their operational requirements. Consequently, the challenge of establishing a unified information system for all departments remains unresolved, and there are now considerable doubts about whether such a solution is feasible at all.

DBOS Portal

Contains technical information about the DBOS platform and its components, including API documentation and details related to DBOS support throughout its lifecycle. The DBOS Portal is maintained primarily by developers and product analysts.

Finshape Product Portal

Contains marketing and sales information. The Sales Academy provides links to 360Learning. The portal is designed to meet the needs of marketers and sales representatives and is maintained by the Marketing Department.

Finshape Academy

360Learning is used for general onboarding across all internal roles and should also be accessible to customers. It is maintained primarily by Business Analytics and Solution Architects, with contributions from several other teams.

Finshape spaces

Specific thematic spaces on Confluence cover a range of areas, from product documentation foundations to internal processes, including operations and HR. These spaces are maintained primarily by business analysts and other non-technical roles within the enterprise.

JIRA

A ticketing system is used to distribute information in the form of specific tasks. Tickets typically include a description of the issue along with the actions required to resolve it. The system is used by all departments and users across the enterprise.

Other sources

OneDrive, Teams, and Git repositories are used to store personal development documents, with some component owners creating private documentation for their own purposes. Employees typically create and store information in these locations for future reference or to share with colleagues upon request.

Chapter 4. Stated key problems

During the interviews conducted, several shortcomings were identified in the existing information sources, along with proposals for their improvement. These suggestions range from enhancing the structure of individual sources and standardising the methods used to create information assets, to developing a centralised information source with role-based access to content.

Information findability

Information should be accessible both to people (via a clear table of contents and full-text search) and to AI agents (via RAG technology).

Senior employees - those who have worked at the company for more than three years - possess extensive experience and all the necessary information to perform their tasks. For them, finding information is usually not difficult, as they are often the original authors of it. However, some knowledge exists only in their minds as tacit experience. Their main challenge lies in the volume of information-related tasks, such as preparing Solution Blueprints and Offers.

On the other hand, because information has accumulated gradually over many years, the existing information sources do not always have a structure that is intuitive for all users (for example, a clear table of contents), and full-text searches do not always deliver accurate results. The users most affected by these difficulties are new employees, partners, and clients.

It is assumed that AI agents could help resolve the problem of information retrieval; however, the accuracy of their results depends heavily on the quality and structure of the content itself. LLM and RAG technologies perform best when working with well-structured information.

Solution

- Define all user groups who access and use the information
- Establish a clear information structure
- Implement a structure content creation approach
- Enable metadata-based filtering foe efficient information retrieval
- Deploy an AI agent (RAG) to enhance search accuracy and accessibility

Misunderstanding

There is both an internal and external lack of clarity, particularly concerning Finshape's products and their individual components. It can be inferred that there is no shared understanding of the value proposition.

The Value Proposition is a core element of the business model. It describes the goods or services the company offers and explains why they are desirable to customers or clients. Ideally, it should be articulated in a way that clearly distinguishes the product or service from its competitors.

A particularly significant communication gap exists between the marketing and sales teams on the one hand, and the project teams on the other. This disconnect represents a major issue.

Solution

- Glossary development
- Value proposition development
- Task-centric approach
- Approve the format of the Initial Proposition (sales phase) document
- Project implementation process description

Outdated information

Certain information sources, such as the DBOS Portal, are regularly updated using the Git version control system. In contrast, other sources do not use version control and therefore require manual updates. Furthermore, the role of content owner is often assigned to department heads, who are already heavily occupied with their regular duties and are unable to keep up with the frequent changes in the company's product landscape, making it difficult to update the related content effectively.

Solution

- Introduction of Content Owner roles (Subject Matter Experts - SME)
- Introduction of Content Contributor roles
- Simplified content contribution process

- Establishment of a single source of truth
- Creation of reusable content
- Implementation of version control
- Content quality verification through continuous feedback

Accessibility

Information must be secure, yet readily accessible when required.

Solution

- Distributed repositories
- Distributed outputs
- Managed access rights to data and outputs

Interoperability

It is difficult to implement a single source (database or repository) that meets the needs of all internal and external users, especially when security considerations are taken into account.

There is sensitive information - such as source code, calculations, and similar materials - that must be kept separate from other sources and have strictly controlled access.

At the same time, certain tasks require the aggregation and extraction of information stored across different sources and systems - for example, when preparing an Offer. In other words, data (and information digital objects) must be interoperable.

It should also be noted that one of the company's stated goals is the implementation of AI agents capable of performing specific tasks autonomously, such as data scraping, list generation, document creation, and system configuration.

Solution

- Distributed repositories
- Information digital object in XML format

Chapter 5. Conclusion

Note:
The solution described below is based on the stated requirements; however, it can be reduced or simplified by excluding features that are not required (such as external users like clients and partners, specific roles, or interoperability functions)

As a solution to meet the information needs of enterprise employees, partners, and clients, a web portal is proposed. This portal can be viewed as a Knowledge Base, offering step-by-step guidance on functional and product-related tasks handled by Finshape's employees, partners, and (in the future) clients in connection with the company's Digital Banking software products.

Functional tasks

Tasks related to the installation and subsequent operation of a custom digital banking solution, or its individual digital banking components, fall within the Functional domain.

Product tasks

Tasks related to the development or configuration of a custom digital banking solution (project tasks), individual DB components, and customer support fall within the Product domain.

The Knowledge Base will evolve in line with established priorities and will primarily support the execution of Product tasks within the processes of Sales, Project Implementation, and Client Support. These tasks are typically performed by the following role types:

- Marketing personnel – act as a source of the value proposition and provide updates on product features
- Sales personnel – manage the initial proposition phase and related client interactions
- Project team – includes all roles involved in the project implementation process
- Support team – responsible for client support and ongoing assistance

As the Knowledge Base is intended for a wide range of role types (see the Approaches section), an initial glossary of terms must be provided.

Note:

There may be no single set of glossary terms that suits everyone, but it is important to remember that all of Finshape's revenue comes from its clients. Therefore, our terminology must be clear and easily understandable to bank employees, particularly to those responsible for purchasing our products.

This approach significantly reduces the time required to find information for tasks that have already been performed and documented by others. Based on research (see Chapter 2), the following results were obtained:

- **2.36 hours of wasted time per day**

  On average, each employee spends around 2.4 hours per day searching for information. In addition, they often interrupt colleagues by asking questions, further reducing overall productivity.

- **575 hours of wasted time per year**

  Assuming an average of 20 working days per month and 12 months per year, the calculation is: 2.4 × 20 × 12 = 576 hours per employee per year.

- **€12,096 in wasted time costs per year**

  With the average daily cost of an employee (including taxes) estimated at €170, the cost per hour is approximately €21. 21 × 576 = €12,096 per employee per year.

- **30 - 45% reduction in time-related costs**

  By using the Knowledge Base, the average employee is expected to spend 30 - 45% less time searching for information.

- **€3,629 annual enterprise gain per employee**

  With a conservative improvement rate of 30%, the annual benefit per employee from implementing and using the Knowledge Base is approximately €3,629.

Portal use step by step guidance

To make using Portal effective, you should follow these simple steps:

1. Go to Role section
2. Select your Role within the drop-down menu
3. Review your Role's task list
4. Select the Task you're working on right now
5. Go to Task's step by step guidance
6. Follow the steps

Approaches

The information provision is expected to take the form of a web portal, with specific sections accessible to both internal and external users. The content within the portal must be available to both individual users and AI agents. The introduction of AI agents is expected to significantly reduce the time required to locate relevant information.

Initially, a central Git repository will be created to store all information objects. This repository will be restricted and not directly accessible to users. Based on the data stored within it, a web output - the central portal - may be generated. This portal will contain the complete set of information, not yet categorised or filtered by user groups, roles, or other criteria.

Subsequently, by excluding unauthorised sections, a separate static web output (website) will be generated for each user group (role or group of roles). Each output (HTML) will be generated solely from the sections permitted for that role, ensuring that both human users and AI agents have identical access rights and are technically unable to access unauthorised information.

All websites will be generated and updated from a single source - the central repository - and all modifications will be made there.

During the first 12 months, it is proposed that static sites for each user group be generated and updated twice per month. Approved changes will appear on portal pages immediately, but in the form of validated SME feedback. Later, the process can be automated and the update frequency increased.

All tasks will be divided into two domains: Functional and Product. All information sources - except the DBOS Portal (developer), Product Portal (marketing), and Academy (360Learning) - are to be gradually consolidated into the new portal through a content migration process.

Note:
An additional decision regarding the continued use of the DBOS Portal (developer), Product Portal (marketing), and Academy (360Learning) may be made after 12 months, once the new portal has reached approximately 70% completion in its development

Content Management

First and foremost, it is important to define the approaches to content creation, modification, and management. For this purpose, the following content-related roles are identified.

Note:
Only the Integrator and Information Architect are required to have technical knowledge. All other roles should be able to work with a simple text editor such as Word; no additional technical skills are necessary for them to perform their tasks effectively

Feedback provider

Any user of the web portal who can leave comments on the content without submitting their own proposed edits.

Contributor

A Contributor is a content author who does not create digital objects but is authorised to propose edits or revisions to existing content. The Contributor does not create digital objects, metadata, or table of contents nodes, and is responsible only for providing the text of the proposed change.

Subject Matter Expert (SME)/Reviewer

The owner of the content, responsible for managing feedback within their area of expertise. The SME decides whether to approve (local merge) a Contributor's proposed content revision. The SME creates a merge request in the central repository and may request the creation of a new digital object from the Integrator.

Integrator

The Integrator creates new digital objects, performs merges into the central repository, publishes outputs, and manages all repositories. This role is also responsible for training SMEs.

Technical Writer

An outsourced role, engaged during periods of high workload and reporting to the Integrator or CIO.

Information Architect

An outsourced role reporting directly to the CIO.

CIO (Chief Information Officer)

The CIO is the owner of all company content and is responsible for the company's content policy, development strategy, and overall information governance. The necessity of this role depends on the strategic value and volume of content within the company. Where such a role exists, the Contributor, Subject Matter Expert, and Integrator report to the CIO in all matters related to content creation, modification, and management.

Standards implementation

To ensure consistency of approach, staff interchangeability, and ease of use, we should not create our own rules and methodologies. Instead, we should rely on widely adopted industry standards.

FAIR principles

The FAIR principle in information management stands for Findable, Accessible, Interoperable, and Reusable. It ensures that data and information are organised in a way that allows both humans and machines to easily locate, access, exchange, and reuse them efficiently and reliably.

VDI 2770

VDI 2770 is a German industry standard that defines the requirements for the creation, structure, and management of digital technical documentation. It provides guidelines for organising and exchanging digital documents - such as manuals, specifications, and maintenance instructions - in a consistent, machine-readable, and standardised format, ensuring clarity, interoperability, and long-term usability across systems and organisations.

DITA XML

Originally developed at IBM as a documentation standard, it is now an open-source, free, and widely used standard designed to support a structured and simplified approach to content creation through the use of templates.

Microsoft Style Guide

The Microsoft Writing Style Guide provides guidance on writing style and terminology for all forms of communication, including applications, websites, and white papers. It promotes clarity, consistency, and inclusivity across all written materials.

Infrastructure and tools

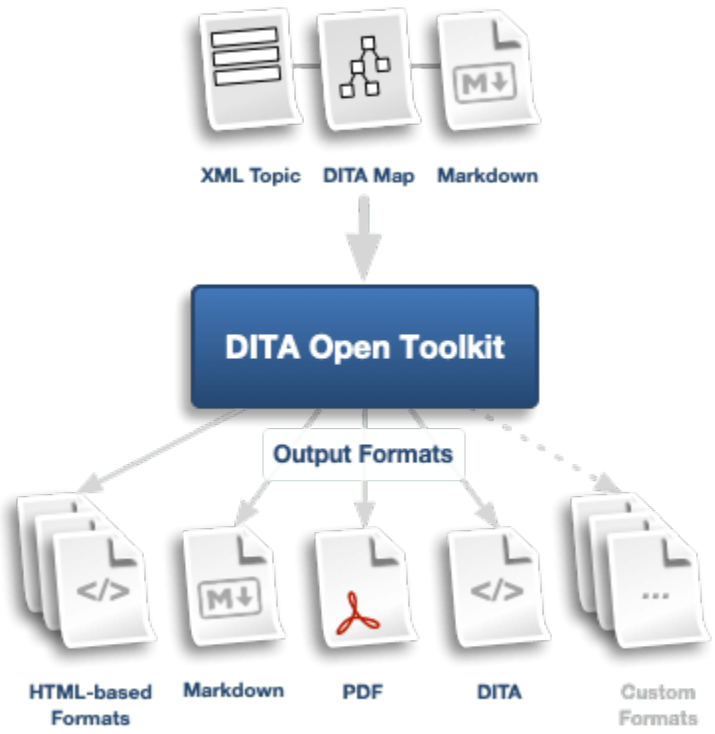
DITA XML editor

We need to select an authoring tool, but there is no immediate need to adopt a content management system - this may become necessary later, in approximately 12–18 months. Many of the most recognised XML editors, enterprise authoring solutions, and commercial content management systems use DITA-OT (DITA Open Toolkit) to publish XML content.

Publisher

The DITA Open Toolkit (DITA-OT) is a publishing engine that provides an extensible framework forming the foundation of a software ecosystem supporting DITA-based workflows. It enables the generation of various outputs, including web portals, PDF, Word, and other publication formats.

Figure 1. Scheme



Feedback

A communication system for interacting with content users, as well as a platform for Contributors and SMEs to collaborate and manage content effectively.

Repository

Distributed GitHub (or GitLab) repositories provide not only storage for information objects but also version control to track and manage content changes.

Cloud

The existing corporate cloud environment is used to host the web portal (HTML).

Finshape knowledge base portal model

To evaluate above-mentioned approaches, a testing Knowledge Base portal was created. You can view the portal model by following the link.