

When experienced people leave, their knowledge leaves with them.

We built a way to capture it before it does,
for a financial services operation in transition.



Your operation runs on knowledge that is not in the manual.

The manual describes the steps. Who to call, which exceptions matter, why this order, what to do when the system says no: that lives in people. It is judgement, built by doing the work for years.



Specialists leave with years of shortcuts and exceptions.
What remains is a simplified version of the work.

That knowledge is under pressure in every organisation, all the time.

Five situations in which the work in your organisation stays and the people change.



A reorganisation

New teams inherit the procedures, not the reasoning behind them.



Retirement and attrition

Every leaver resets the clock.



An acquisition or divestment

The work changes hands. The judgement does not.



New regulation, growing complexity

More cases where it depends. The rules live in experts' heads.



Work moving to a shared service centre

The receiving team runs on what it was told.

What is not written down does not travel.

If one of these is on your agenda for the next twelve months, this is about you.

Handovers, workshops and documentation projects lose the signal.

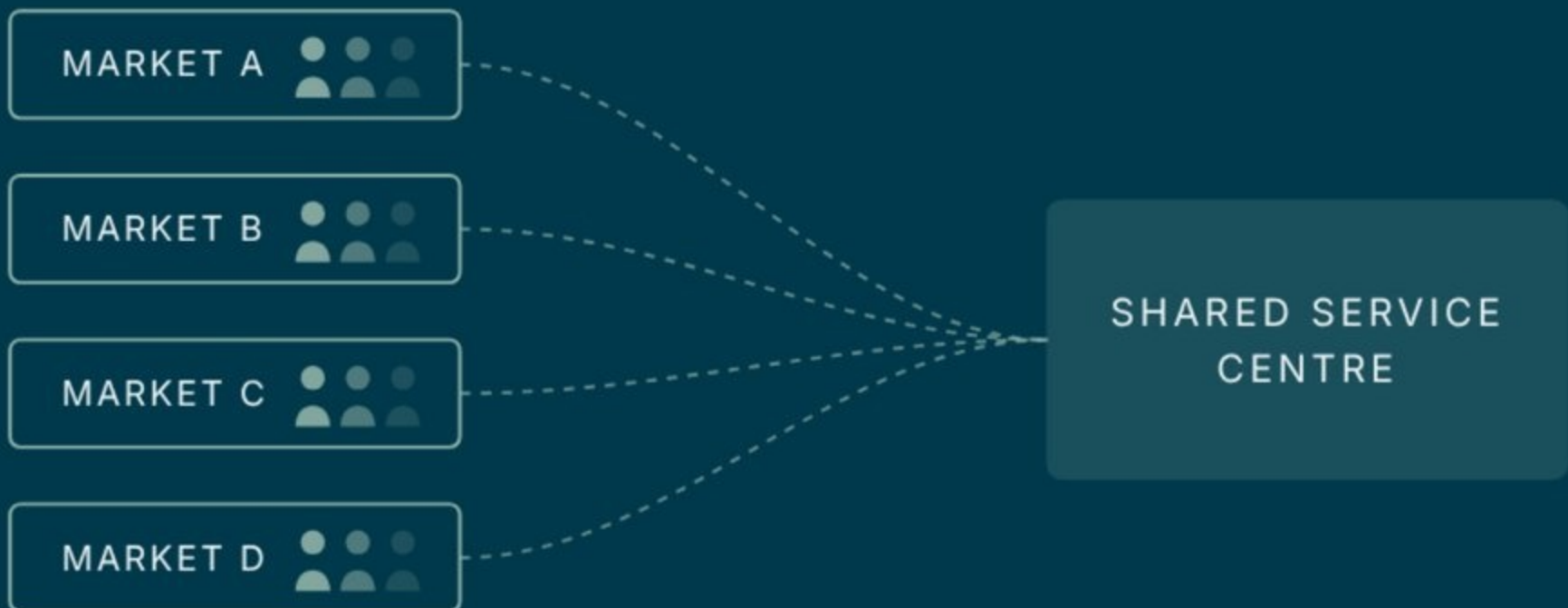
An expert explains the work to a successor, who later explains it to someone new. With every handover the context thins out.



The same rule is applied in different ways. Steps are loosely interpreted. Escalations pile up on a few overloaded experts. The number of variations explodes.

Can you capture what experts know, check it, and keep it current, at the pace of a transformation? We tested it.

A financial services company is moving part of its operations, market by market, into a shared service centre. The experts leave as the work moves. One sub-process in one market was the test.



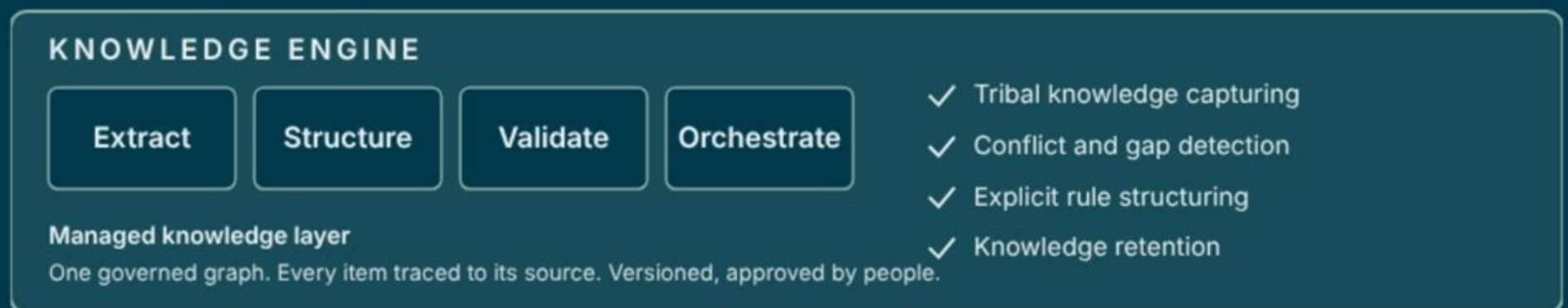
The existing documents and the conversations with the experts went in. Procedures, rules, controls and decision trees came out, in the client's own template.

The knowledge engine, in full.

KNOWLEDGE EXTRACTION



KNOWLEDGE STRUCTURING



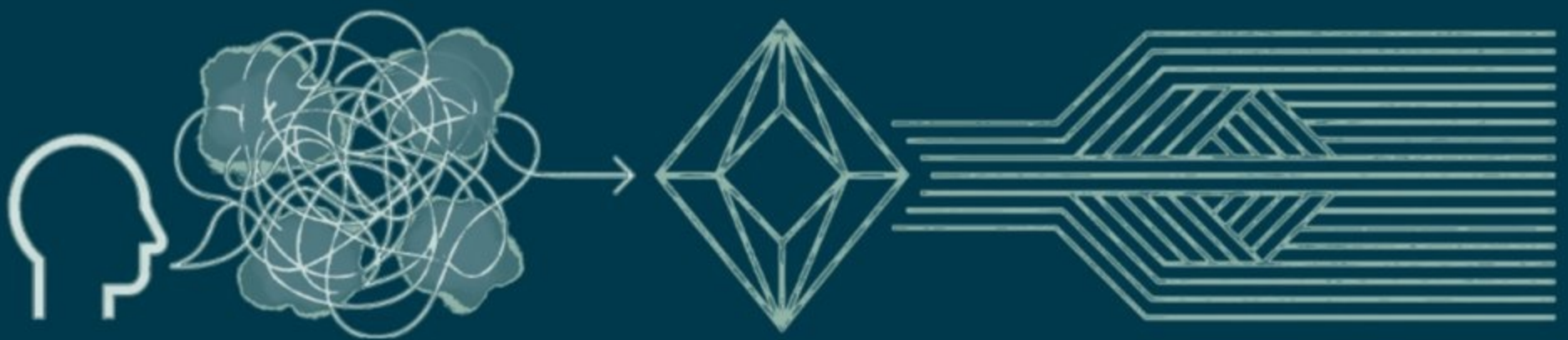
KNOWLEDGE OPERATIONALIZATION



In plain terms: it takes the explicit knowledge in your documents and the tacit knowledge in your experts' heads, and puts both in one structured, governed graph that can be checked.

The AI reads and drafts, rules store and version, people approve.

From tangled to structured: the engine sees what nobody reading the documents one at a time can see.



- Contradictions between documents that had been in circulation side by side.
- Gaps nobody had on paper.
- Procedures that were never written, with one person as the fallback.

Transition risks named before the transfer, not discovered after it.

Validated by the client's own experts, item by item.

Every rule, control, decision and role went back to the experts as a separate line with its source and a verdict.



What was wrong became a corrections list before go-live. Not an error discovered after it.

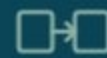
A proof, not production: one sub-process, one market. Keeping the model right, per process and per wave, is the work.

Five things you can do with governed knowledge. Where you start is your choice.



Control

One definition of the work. Audit evidence by default. Quality checked against a rule, not a memory.



Transition

A faster, cleaner handover. The receiving team learns from what was known, not from what it was told.



Operations

An assistant that answers in seconds, with a reference. Onboarding on approved knowledge, in the form that fits the learner: a briefing, a quiz, a podcast.



Improvement

Contradictions and variations visible across teams and markets, before anything is automated.

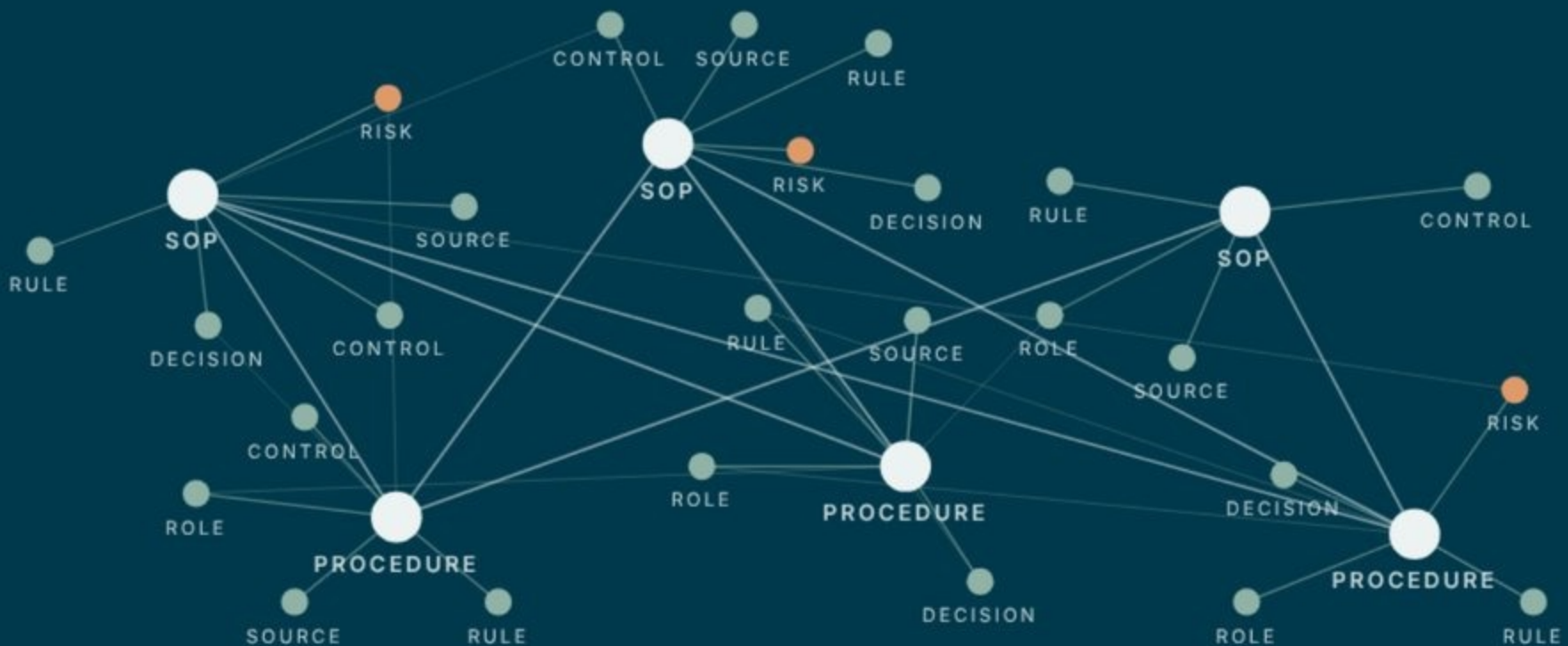


Execution, once the knowledge is governed

Agents on the rule-bound steps, every action logged. People keep the approvals and the exceptions. The one option that needs the others in place first.

This is why we call it capturing entrepreneurial knowledge: the knowledge people use to get the work done, not the knowledge in the manual.

The goal is not full automation. It is a more stable, predictable and understandable way of working.



ONE GOVERNED KNOWLEDGE GRAPH · EVERY ITEM TRACED TO ITS SOURCE

How much of your process knowledge would survive if your two most experienced people left in the same quarter?

Come prepared. Transformation is a journey we make together.

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