

# Scaling Collaboration and Documentation with Confluence

**Client:** Consulting firm (95 employees, multiple locations)

**Industry:** Professional Services

**Engagement Type:** Confluence implementation & knowledge migration

**Focus:** Centralized knowledge, standardization, and search



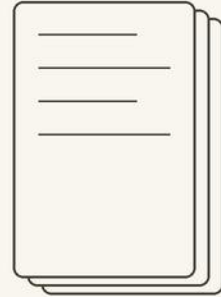
# The Situation

For a consulting firm, knowledge is the product—yet theirs was scattered across disconnected systems and personal drives. Brilliant work existed; almost no one could find it twice.

## What they were up against:

1. **Knowledge in silos** — Critical documents lived across disparate systems, with no central home or shared structure.
2. **Hard to find, harder to reuse** — Employees struggled to locate the information they needed to serve clients efficiently.
3. **Reinventing the wheel** — Without templates or standards, every report and plan started from a blank page across locations.

Stakeholders: Practice leads across offices, knowledge management, and firm leadership.



# Our Objectives

01

---

## Create One Home

Consolidate scattered documents into a single, well-structured knowledge platform the whole firm shares.

03

---

## Make Knowledge Findable

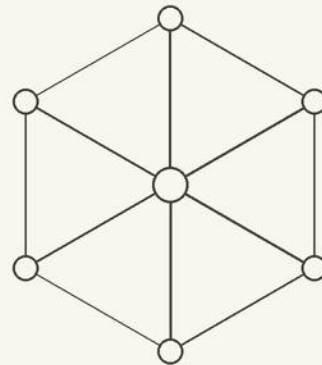
Build a clear information architecture and search practice so the right document is seconds away.

02

---

## Standardize the Output

Introduce templates for reports, notes, and plans so quality and consistency travel across every office.



# Our Approach: Migration & Structure

## 1) Centralized Knowledge Home

- Migrated legacy documents from scattered systems into a single Confluence platform.
- Team-specific spaces designed for tailored collaboration without losing firm-wide consistency.
- A logical information architecture so content has an obvious, predictable place to live.

## 2) Standardized Templates

- Reusable templates for reports, meeting notes, and project plans to standardize documentation.
- Consistent structure that makes work easier to produce—and far easier to reuse.
- Firm-wide patterns that raise the floor on quality across every location.



# Our Approach: Adoption & Findability

## 1) Search & Organization

- A deliberate page hierarchy and labeling practice that makes content genuinely discoverable.
- Search tuned around how consultants look for information under client deadlines.
- Clear ownership so spaces stay current instead of quietly going stale.

## 2) Enablement & Best Practices

- Hands-on training on content organization and effective search.
- Lightweight conventions that make good documentation the path of least resistance.
- Champions identified in each office to sustain adoption after handover.



# Timeline: Fast-Track to Value

## 1 Week 1-2 Audit & Architecture

Inventoried existing documents and designed the space structure and information architecture.

## 2 Week 3-4 Migrate & Template

Migrated legacy content into Confluence and built the standardized template library.

## 3 Week 5-6 Organize & Pilot

Refined labeling and search, then piloted with two practice teams across offices.

## 4 Week 7-8 Train & Roll Out

Delivered firm-wide training, named space champions, and finalized governance for upkeep.

*The schedule was designed to deliver value fast—standing up a working, governed foundation in weeks, not quarters.*

# The Results

**70%**

## **Easier Access**

Employee-reported efficiency in accessing critical data, based on a quarterly survey.

**20%**

## **Faster Response**

Client-request response time improved, attributed to quicker access to resources.

**1**

## **Unified Platform**

Disparate document systems consolidated into one searchable knowledge home.

*Measured via a quarterly employee survey and client-response time tracking before and after rollout.*



# What We Delivered

## **Centralized Confluence Platform**

One searchable home for firm-wide knowledge

## **Team-Specific Spaces**

Tailored collaboration with consistent structure

## **Template Library**

Standardized reports, notes, and project plans

## **Information Architecture**

Logical hierarchy and labeling for findability

## **Search Enablement**

Practices tuned to how consultants actually search

## **Training & Champions**

Adoption support sustained in every office



# Client Voice

“

*Our best thinking used to disappear into someone's laptop. Now it lives where the whole firm can find it, reuse it, and build on it.*

— Practice Lead

“

*New work starts from a strong template instead of a blank page. Across every office, our documentation finally looks—and reads—like one firm.*

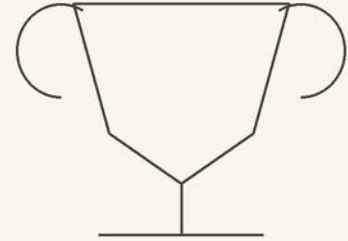
— Director of Knowledge Management



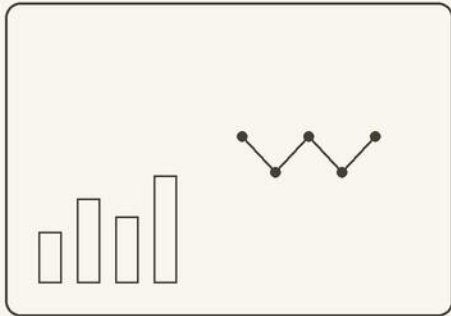
# Key Takeaways

For a knowledge business, scattered information is a silent tax on every client engagement. By centralizing documents, standardizing templates, and making search genuinely work, the firm turned its collective expertise into an asset it could actually find and reuse.

With structure and ownership in place, the knowledge base compounds in value—getting more useful, not more chaotic, as the firm grows.



# Ready to Unlock Your Firm's Knowledge?



## About Avaratak

Avaratak is an **Atlassian Solution Partner** delivering enterprise-grade expertise with personalized service and honest pricing—from licensing through implementation, training, and ongoing improvement.

We bring senior Atlassian consultants, transparent pricing, and a commitment to solutions that scale with your needs.

## Start with a Knowledge & Findability Review

We'll assess how your documentation is structured and searched today, and map the fastest path to a single, findable source of truth.

**Book a consultation** to see how we can help.

**Book Now!**

