

# Internal knowledge inventory

Choose a small set of useful records and decide how people will find, maintain and use them.

|                                                    |                                        |                                         |
|----------------------------------------------------|----------------------------------------|-----------------------------------------|
| A record of the questions the team needs to answer | Source owners, access and review dates | An example structure for a service firm |
|----------------------------------------------------|----------------------------------------|-----------------------------------------|

A free worksheet from [ailevrg.com/guides/internal-knowledge-base](https://ailevrg.com/guides/internal-knowledge-base)

Use this for one team or recurring job first. You can keep an existing document system; the worksheet does not require a new platform.

## 01 Useful question

|                                              |                                  |
|----------------------------------------------|----------------------------------|
| <b>Person who needs the answer</b>           | <b>Recurring question or job</b> |
| <div></div>                                  | <div></div>                      |
| <b>What they need to know to complete it</b> |                                  |
| <div></div>                                  |                                  |

## 02 Information

|                                             |                                               |
|---------------------------------------------|-----------------------------------------------|
| <b>Sources that can answer the question</b> | <b>Current version and source link</b>        |
| <div></div>                                 | <div></div>                                   |
| <b>Records that disagree or are missing</b> | <b>Who can explain or approve each record</b> |
| <div></div>                                 | <div></div>                                   |

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### 03    Access and upkeep

**Who should be able to read it**

**Information that must stay separate**

**When each record needs review**

**Person responsible for updates**

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### 04    Try it

**Person testing the first version**

**Normal question and awkward question**

**What they could find and what they still needed**

**Next change and review date**

# Context for an account meeting

Invented teaching example. No client outcome is claimed.

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## Question

What has this client agreed, and which issues need a decision at the next meeting?

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## First collection

Current agreement, approved goals, recent decision notes and an open-issues record.

The account owner confirms which agreement is current.

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## Finding and access

A client page links to those four records.

Only the relevant account team can read the private client page.

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## Test

A colleague follows the links and prepares a meeting brief.

If a decision has no recorded owner or evidence, it goes back to the account owner.

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## Upkeep

A reviewed meeting decision updates the decision record.

The account owner checks open issues before the next meeting.