

Knowledge management plan

Choose a useful starting point and assign ownership, access and review.

A plan for one valuable area of knowledge

Responsibilities for maintaining and using it

A completed client-reporting example

A free worksheet from ailevrg.com/guides/knowledge-management-strategy

Choose one recurring decision before filling this in. Expand the plan once another person can use the first collection.

01 Purpose

Recurring job or decision

People who need the knowledge

Problem observed today

Starting measurement

02 Information and access

Sources and expert judgement needed

Shared method and private client information

Who may read or change each part

Missing or contradictory information

03 Ownership

Knowledge owner and reviewer

Event that creates an update

Where an approved change is recorded

Review date or expiry rule

04 Use and review

Where the knowledge appears during work

Normal job and exception to test

Result that would count as improvement

Next review and responsible person

A plan for reporting requirements

Invented teaching example. No client outcome is claimed.

Purpose

Help another team member prepare the correct client report without reconstructing its requirements from old emails.

Knowledge

Shared reporting method, the client's current agreement, metric definitions and approved exceptions.

Responsibility

The account owner approves client requirements. The reporting lead owns the shared method.

An approved change updates the client record and links to its source.

Test

A colleague prepares a report brief from the collection.

An expired requirement should produce a question for the account owner, rather than a guessed brief.

Measure

Record preparation time and missing decisions before and after the first collection. No improvement is assumed.