ORGANIZATIONAL MEMORY

Organizational Memory Map

A worksheet for deciding what knowledge an AI system should preserve, retrieve, refresh, forget, and cite.

> **WHAT THIS TEMPLATE HELPS YOU DECIDE**
>
> Treat memory as infrastructure instead of chat history. Map durable knowledge, temporary context, retrieval rules, refresh cadence, ownership, and deletion boundaries.

BEST FOR

- Teams building internal knowledge, advisory, sales, or operations assistants
- Organizations with repeated decisions spread across documents and conversations
- Leaders who need context integrity before scaling AI workflows

OUTPUTS

- A durable memory inventory
- Retrieval and citation rules
- Refresh, expiry, and ownership cadence

STEP 1

Inventory what should be remembered

Not all context should become memory. Start by separating durable knowledge from temporary session context and sensitive information that should never persist.

Memory sources

Durable knowledge sources

Policies, service descriptions, playbooks, decisions, product facts, operating rules.

Temporary context sources

Session details, recent messages, draft requests, case-specific notes.

Never-store inputs

Credentials, unnecessary personal information, confidential attachments, unapproved strategy.

Memory value check

- [ ] The knowledge improves repeated decisions or workflows
- [ ] The source is authorized for operational use
- [ ] The owner can update or retire the knowledge
- [ ] The system can cite or explain where the knowledge came from
- [ ] The memory has a clear expiry, review, or refresh rule

STEP 2

Define retrieval rules

Memory is only useful when retrieval is precise. Define when knowledge should be pulled into context, how conflicts are resolved, and what evidence is shown.

Retrieval design

Trigger	Which user intent, workflow event, or tool result should retrieve this memory?
Scope	Which team, workflow, customer segment, or permission group may access it?
Ranking	What makes one source more authoritative than another?
Conflict rule	What happens when two sources disagree or one source is stale?
Citation	What source label, link, or evidence should appear with the output?

Organizational memory should reduce ambiguity, not create false certainty. When context is stale, conflicting, or weak, the system should say so and route review.

STEP 3

Create the memory cadence

Memory quality decays when ownership is unclear. A cadence keeps the system aligned with how the organization actually decides and operates.

Memory operations

Owner	Who can approve, update, archive, or delete this memory?
Review cadence	How often should the memory be checked for accuracy and usefulness?
Expiry rule	When should this knowledge stop being retrieved automatically?
Feedback loop	How do users report missing, wrong, or misleading memory?
Audit trail	What should be logged when memory changes?