



Organizational Memory Map

Decide what knowledge AI should preserve, retrieve, refresh, forget, and cite.

STRUCTURE - CLARITY - BETTER DECISIONS

Practical architecture for accountable AI-enabled work.

What this template is for

Decide what knowledge AI should preserve, retrieve, refresh, forget, and cite. Use this guide to make the operating choice explicit, test it with evidence, and record who owns the next decision.

BEST USED WHEN

Teams building internal knowledge, advisory, sales, or operations assistants.

WHO SHOULD BE IN THE ROOM

Include the workflow owner, a person who performs the work, a reviewer with authority to approve or stop it, and the relevant data or tool owner.

CANADIAN CONTEXT

Confirm applicable federal, provincial, territorial, sector, professional, contractual, accessibility, and bilingual-service requirements. Use this workbook as operational preparation, not legal advice.

A five-step working rhythm

01

Scope

What is in and out of scope for organizational memory map?

02

Information

Which approved sources and permissions are required?

03

Authority

Who can review, approve, override, or stop this work?

04

Failure

What happens when evidence, quality, tools, or ownership fail?

05

Proof

What result would justify continuing or expanding?

Build the working record

Complete one record for one workflow. Write enough to support a decision, not a generic technology wish list.

PROMPT	YOUR WORKING NOTES
01 Workflow and purpose	
02 Accountable owner	
03 Required evidence	
04 Scope	
05 Information	
06 Authority	
07 Decision, owner, evidence, and review date	

Preserve approved delivery knowledge

STARTING FRICTION

Teams repeatedly reconstruct client-safe methods from old files with uncertain reuse rights.

WORKFLOW MAP

KNOWLEDGE NEED

SOURCE OWNER

RETENTION RULE

RETRIEVAL TEST

REVIEW

MEMORY UPDATE

AI-SUPPORTED ROLE

Retrieve current approved knowledge and show provenance, freshness, and conflicts. Flag uncertainty around scope.

HUMAN AUTHORITY

Knowledge owners decide what to retain, refresh, correct, cite, or forget. Resolve the scope question for this case.

PILOT MEASURE

Track stale answers, missing citations, duplicate work, and time to refresh knowledge. Record scope exceptions separately.

DISCUSSION PROMPT

What evidence would the reviewer need to trust, correct, reject, or escalate this output?

Keep store knowledge current

STARTING FRICTION

Seasonal policies, supplier terms, and staff guidance change faster than an assistant's remembered answers.

WORKFLOW MAP

KNOWLEDGE NEED

SOURCE OWNER

RETENTION RULE

RETRIEVAL TEST

REVIEW

MEMORY UPDATE

AI-SUPPORTED ROLE

Retrieve current approved knowledge and show provenance, freshness, and conflicts. Flag uncertainty around information.

HUMAN AUTHORITY

Knowledge owners decide what to retain, refresh, correct, cite, or forget. Resolve the information question for this case.

PILOT MEASURE

Track stale answers, missing citations, duplicate work, and time to refresh knowledge. Record information exceptions separately.

DISCUSSION PROMPT

What evidence would the reviewer need to trust, correct, reject, or escalate this output?

Separate client and firm knowledge

STARTING FRICTION

Reusable internal procedures must not be confused with confidential client-specific facts.

WORKFLOW MAP

KNOWLEDGE NEED

SOURCE OWNER

RETENTION RULE

RETRIEVAL TEST

REVIEW

MEMORY UPDATE

AI-SUPPORTED ROLE

Retrieve current approved knowledge and show provenance, freshness, and conflicts. Flag uncertainty around authority.

HUMAN AUTHORITY

Knowledge owners decide what to retain, refresh, correct, cite, or forget. Resolve the authority question for this case.

PILOT MEASURE

Track stale answers, missing citations, duplicate work, and time to refresh knowledge. Record authority exceptions separately.

DISCUSSION PROMPT

What evidence would the reviewer need to trust, correct, reject, or escalate this output?

Before the pilot grows

Use these prompts to test whether the proposed workflow can operate responsibly in its Canadian business context.

01

Scope

The business purpose and workflow are explicit. Name the owner and the operating decision before selecting a tool.

02

Information

Approved sources and affected people are known. Record the approved sources, permissions, and missing information.

03

Authority

A human owner can review consequential output. Test this boundary with representative and adverse cases.

04

Failure

Failure and fallback paths are practical. Preserve review, escalation, and correction evidence.

05

Proof

The outcome can be measured against a baseline. Set a measurable stop condition and the next review date.

06

Readiness to proceed

The outcome can be measured against a baseline. Record the owner, evidence, next decision, and review date.

CANADIAN REFERENCE POINTS

Office of the Privacy Commissioner of Canada - Privacy and artificial intelligence
priv.gc.ca/en/privacy-topics/technology/artificial-intelligence/

Government of Canada - Artificial Intelligence guidance, principles, and policy
canada.ca/en/services/science/innovation/artificial-intelligence.html

General operational guidance only. Confirm applicable legal, privacy, cybersecurity, professional, contractual, and regulatory requirements with qualified advisors.