KrambergAI

PRACTICAL CHECKLIST

COMPANY BRAIN · INSTITUTIONAL MEMORY

Structuring Company Knowledge

A practical test for an AI-supported institutional memory — before the technology comes, you need structure.

In most companies the knowledge already exists, but it is hard to find: in emails, project files, quotes, maintenance reports, checklists, the CRM, the ERP, or in the heads of experienced staff. An AI-supported institutional memory makes that knowledge usable — **but structure comes before the technology.**

1 Knowledge Sources

- [ ] Which information is searched for most often day to day?
- [ ] Where do quotes, project files, maintenance reports and templates live?
- [ ] What data sits in email, file storage, the CRM, ERP or ticketing system?
- [ ] Which information exists only in individual employees' heads?
- [ ] What is genuinely relevant to office, sales, project management, service and technical teams?

Common sources: quotes, checklists, technical documentation, maintenance reports, email threads, customer history, templates.

2 Data Quality

- [ ] Can current and outdated documents be told apart?
- [ ] Are there duplicate or conflicting templates?
- [ ] Is it clear who can review content for accuracy?
- [ ] Which documents must not be used unchecked?
- [ ] What needs to be cleaned up or flagged before launch?

Guiding question: which knowledge areas are reliable enough for a first pilot?

3 Roles & Permissions

- [ ] Who is allowed to see which knowledge?
- [ ] Do office, sales, service, technical staff and management need different access?
- [ ] Which customer, contract or internal documents are confidential?
- [ ] Who may add or approve new content?
- [ ] How is access handled when employees join or leave?

Important: a Company Brain must never become an unfiltered data dumping ground.

4 Typical User Questions

- [ ] Which template do we use for this type of quote?
- [ ] What was documented on the last service visit?
- [ ] What open items were there on the project?
- [ ] Which checklist applies to the handover?
- [ ] What is unique about this customer or site?
- [ ] Which documents are missing before a quote, callback or job scheduling?

Goal: answers should be traceable and point back to the relevant sources.

5 Rollout & Operation

- [ ] Which knowledge area is the best starting point?
- [ ] Who owns it from a subject-matter perspective?
- [ ] Which sources are connected first?
- [ ] How are answers reviewed and improved?
- [ ] How are data protection, storage location and data processing clarified?
- [ ] How do you prevent outdated knowledge from being reused?

Good entry points: quoting knowledge, service & maintenance knowledge, project handovers, technical documentation, internal checklists.

⚠ Common Mistakes to Avoid

- ✕ Connecting every document without review
- ✕ Naming no one responsible for content
- ✕ Granting permissions too broadly
- ✕ Mixing current and outdated documents
- ✕ Reviewing data protection only after go-live
- ✕ Planning no upkeep after launch

QUICK ASSESSMENT

● Many boxes ticked
Strong conditions for an AI-supported institutional memory.

● Some boxes ticked
A start is feasible — with a limited pilot and a clean permissions model.

● Few boxes ticked
First clarify data sources, ownership, currency and data protection.

NEXT STEP

KrambergAI AI Assessment

Together we assess whether a Company Brain makes sense for your business — whether it is feasible and responsible to run. The structured entry point for mid-sized companies, skilled trades and technical service providers.

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