

## 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?<br><div></div> |
| Scope         | Which team, workflow, customer segment, or permission group may access it?<br><div></div>     |
| Ranking       | What makes one source more authoritative than another?<br><div></div>                         |
| Conflict rule | What happens when two sources disagree or one source is stale?<br><div></div>                 |
| Citation      | What source label, link, or evidence should appear with the output?<br><div></div>            |

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?<br><div></div>            |
| Review cadence | How often should the memory be checked for accuracy and usefulness?<br><div></div> |
| Expiry rule    | When should this knowledge stop being retrieved automatically?<br><div></div>      |
| Feedback loop  | How do users report missing, wrong, or misleading memory?<br><div></div>           |
| Audit trail    | What should be logged when memory changes?<br><div></div>                          |

### Build memory that improves decision quality.

IntelliSync helps organizations design memory systems with source authority, retrieval rules, ownership, and governance built in from the start.

[Open Architecture Assessment](#)