

Knowledge Capture Mini Pipeline

Use the method

Turn a recurring task known by one person into a reviewed, findable operating note. Use this when a business relies on memory or repeated explanations. The output is a small knowledge record with an owner, source, test result, and review date. AI may organize notes but should not invent missing procedure steps.

- 1. Choose one task.** Pick a recurring task with a clear start and result. Prefer a task that causes delays when the knowledgeable person is unavailable.
- 2. Capture actual practice.** Ask the operator to walk through a real or safe practice case. Record inputs, steps, decision points, exceptions, and where records are stored.
- 3. Draft the note.** Use approved notes to create a short procedure. Ask AI to flag gaps and distinguish observed steps from proposed improvements.
- 4. Validate with the owner.** Have the knowledgeable person check the draft against practice. Resolve conflicting accounts before calling the note approved.
- 5. Test with another operator.** Ask a second person to follow the note on a safe case. Record questions, errors, and missing inputs. Revise and repeat if the result cannot be achieved.
- 6. Publish and maintain.** Store the approved version in the authoritative location with a descriptive title, owner, version, and review date. Archive superseded versions according to your rules.

Worked example

Illustrative task: preparing a customer welcome email after a signed agreement. The coordinator explains where the agreement is stored, which customer details are required, and who checks the first delivery date.

The first draft says "send the welcome email" but omits the template location and the rule for an unconfirmed start date. The owner supplies both details.

A second operator tests the note using a practice customer record. They find the template, create the draft, and route it to the delivery owner for confirmation. No customer message is sent during the practice test.

Approved note: "Customer welcome preparation," version 1.0, coordinator owner, stored in the operations knowledge folder, reviewed next month or whenever the template changes.

Before you put it to work

- ☐ Steps reflect validated practice rather than AI guesses.
- ☐ Another operator can find the required inputs and records.
- ☐ A practice test produced the expected result.
- ☐ The published note has an owner and review trigger.

If the problem keeps returning

If the note becomes stale, inspect what changed in the workflow or tool. Update the affected steps and retest the task; editing the review date alone does not restore accuracy.

Connect the tools

Use BO-03 for an SOP starter and LS-05 to test understanding through teach-back.

First use

Use the worksheet on the next page for one real task. Complete the decision fields, name the person responsible, and choose a review date. Duplicate the worksheet when you need another record.

Working worksheet

Name or team _____ Date _____

Capture target

Task, trigger, expected result, knowledgeable person, and record owner.

Source record

Walkthrough date, approved notes, inputs, tools, and record locations.

Procedure draft

Ordered steps, decision points, exceptions, and gaps requiring confirmation.

Complete and review

Owner validation

Corrections, unresolved conflicts, reviewer, and validation date.

Second operator test

Practice case, tester, questions, result, and revisions.

Publication and upkeep

Title, version, authoritative location, owner, next review, and change triggers.

Review after use

Where did the tester stop or ask for help? _____

Which missing detail was added? _____

What change would trigger an early review? _____

Who will check the note at the next review date? _____

Next action _____ Owner _____ Due _____