



— MANUAL

Knowledge Management System Manual

This manual describes how [Company Name] establishes, implements, maintains and continually improves its knowledge management system and demonstrates, clause by clause, how the organization satisfies ISO 30401:2018. It provides traceability between the requirements of the standard and the organization's policy, procedures, work instructions, forms and tools.

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MAN-01	[Revision]	[Date]	[Designation Here]



The organization has grown steadily since its establishment, adding disciplines and offices as it has taken on larger and more complex projects. That growth is itself a knowledge management driver: as the organization has become larger and more dispersed, the informal sharing that worked when everyone sat in one office no longer reaches everyone who needs it, and deliberate systems are required to do what proximity once did. This manual and the system it describes are the organization's response to that reality.

2.4 The knowledge domains that matter most

Not all of the organization's knowledge carries equal weight, and the knowledge management system concentrates on the domains that create the most value and face the greatest risk. The most significant domain is engineering design know-how by discipline, the accumulated judgement about how to design safely, economically and reliably in each field, much of which is tacit and held by senior specialists. Close behind is project lessons learned, the record of what worked and what failed on past projects, which prevents costly repetition when it is captured and reused. Bid and tender knowledge, the understanding of how to price and scope work to win it profitably, is a domain whose value is felt directly in the order book. Client, contract and regulatory knowledge protects the organization from compliance failures and disputes, and supplier and materials knowledge supports sound procurement. Cutting across all of these is the specialist expertise of individual senior staff, which is the most valuable and the most vulnerable knowledge the organization holds, because it can walk out of the door when a person retires. These domains are identified, evaluated and prioritized formally under procedure QP-02, and the priorities determine where the system invests its effort.

2.5 The organization's knowledge management journey

[Company Name] does not claim a fully mature knowledge management system from the outset. It treats the system as something that grows through cycles of learning and feedback, consistent with the iterative principle in the standard. In its early stages the emphasis is on establishing the foundations, the policy, the roles, the priority domains and the basic processes for lessons learned and critical-knowledge retention, and on demonstrating quick, visible value so that the system earns the confidence of the people who must use it. As the system matures, the emphasis shifts to depth and integration: richer communities of practice, a well-curated knowledge base, robust measurement of value, and the embedding of knowledge steps into every relevant process. This manual describes the system as it is designed to operate when mature, while recognising that the organization will reach that state progressively, and the maturity of each part is tracked through the objectives and reviewed at management review.

2.3 Using and maintaining this manual

The manual is used by reading the clause-by-clause sections (4 to 10), each of which states how the organization conforms, describes the approach, and points to the supporting documents and records. It is maintained by the Chief Knowledge Officer, who updates it when procedures change, when the organization changes, or when the standard is revised. Users always access the current version from the knowledge platform rather than relying on local copies. Changes follow the document control procedure QP-12 and are recorded in the revision history.



PROCEDURE

Knowledge Domain Identification, Evaluation and Prioritization

This procedure defines how [Company Name] identifies its knowledge domains, evaluates each for value and vulnerability, and prioritizes the domains to which the knowledge management system is applied most fully. Aligned to ISO 30401:2018, clause 4.3, and supporting the knowledge development requirements of clause 4.4.2.

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FORM

Critical Knowledge Register

Associated procedure: QP-02 · [Company Name]

FORM No.

QF-02-03

Rev [Revision] · Issue [Date]

Record holders of critical knowledge. Retention risk = criticality x attrition (1 to 5 each). A score of 12 or above requires a retention plan QF-03-03 (QP-03, tool T-05).

1 Critical knowledge holders

Holder role	Knowledge domain	Crit.	Attr.	Score	Retention plan
Principal Process Engineer	Critical expert judgement	5	4	20	QF-03-03-014
Structural Lead	Structural design know-how	5	3	15	QF-03-03-015
Senior Geotechnical Engineer	Geotechnical judgement	4	4	16	QF-03-03-016
Bid Manager	Bid and tender knowledge	4	2	8	Monitor

Approval

Role	Name	Signature	Date
Prepared by (Domain Owner)			
Approved by (CKO)			

This documentation toolkit was developed by the consultant panel of isofolder.



FORM

Lessons Learned Register

Associated procedure: QP-03 · [Company Name]

FORM No.

QF-03-02

Rev [Revision] · Issue [Date]

Record lessons with a specific, actionable recommendation. Curated and tagged by the Domain Owner and reused via the bid and design-gate checklists (QP-03, WI-03-01).

1 Lessons

Ref	Project	Domain	Situation / event	Cause	Recommendation	+/-	Status
L-041	Bridge A	Structural	Late design change from drainage-structure clash	Coordination check done too late	Run early drainage-structure coordination check	Negative	Curated
L-042	WTP B	Process	Reused pipe-rack detail saved 3 days	Proven detail available and found	Keep pipe-rack details in reusable library	Positive	Curated

Approval

Role	Name	Signature	Date
Curated by (Domain Owner)			

This documentation toolkit was developed by the consultant panel of isofolder.



FORM

After-Action Review Record

Associated procedure: QP-04 · [Company Name]

FORM No.

QF-04-02

Rev [Revision] · Issue [Date]

Record an after-action review using the four questions. Enter reusable lessons in QF-03-02 (QP-04, WI-04-01).

1 Review details

PROJECT / PHASE Pumping station B, detailed design	DATE [Date]
FACILITATOR Engineer, Region A (neutral)	PARTICIPANTS Design team (6)

2 The four questions

WHAT DID WE INTEND TO HAPPEN? Complete detailed design within 10 weeks to the agreed scope.
WHAT ACTUALLY HAPPENED? Design took 13 weeks; a key client decision arrived late.
WHY WAS THERE A DIFFERENCE? The client-decision dependency was not flagged or tracked early.
WHAT WILL WE DO DIFFERENTLY? Identify client-decision dependencies at design start and track on the programme.

3 Lessons recorded

Lesson	Register ref
Track client-decision dependencies from design start	QF-03-02 L-051
Hold a short mid-phase client check	QF-03-02 L-052

Approval

Role	Name	Signature	Date
Facilitator			
Project Manager			

This documentation toolkit was developed by the consultant panel of isofolder.

	FORM Community of Practice Charter and Register Associated procedure: QP-04 · [Company Name]	FORM No. QF-04-01 Rev [Revision] · Issue [Date]

Charter a community of practice and record its members and meetings (QP-04, WI-04-02).

1 Charter

DOMAIN Structural engineering	FACILITATOR Structural Lead
PURPOSE Share and develop structural design knowledge across offices	CADENCE Monthly (video), 2x/year in person

2 Members

Member group	Number
Structural engineers, Head Office	12
Structural engineers, Region A	6
Structural engineers, Region B	5

3 Meeting log

Date	Topics / outcomes	Participation
[Date]	Connection detail clash; agreed best-practice detail	78% of structural staff
[Date]	Seismic method share; guidance note produced	74%

Approval

Role	Name	Signature	Date
Facilitator			
Domain Owner			

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FORM

Critical Knowledge Retention Plan

Associated procedure: QP-03 · [Company Name]

FORM No.

QF-03-03

Rev [Revision] · Issue [Date]

Plan the retention of a critical knowledge holder's knowledge before it is lost (QP-03, WI-03-02). Required where the retention risk score is 12 or above.

1 Holder and risk

HOLDER ROLE Principal Process Engineer	DOMAIN Critical expert judgement
RETENTION RISK SCORE 20 (criticality 5 x attrition 4)	PLANNED DEPARTURE [Date]

2 Knowledge captured explicitly

Commissioning checklist and troubleshooting logic captured in four retention interviews and written up as guidance notes GN-PR-07 and GN-PR-08.

3 Tacit knowledge and transfer plan

Judgement on non-standard commissioning cannot be fully documented. Transfer by pairing the nominated successor with the holder on the final two commissionings, plus monthly mentoring until departure.

4 Successor and review

SUCCESSOR Senior Process Engineer (named)	REVIEW DATE [Date]
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Approval

Role	Name	Signature	Date
Prepared by (Domain Owner)			
Approved by (CKO)			

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SECTION 4

Finding the knowledge that matters

Not all knowledge is equally valuable or equally at risk. This procedure focuses the knowledge management system on the domains where deliberate management delivers the greatest return, by scoring each domain for value and vulnerability.

1 Purpose

This procedure ensures that [Company Name] identifies the bodies of knowledge it holds, evaluates and prioritizes the knowledge domains of greatest value to the organization and its interested parties, and determines which domains the knowledge management system should be applied to and how fully, as required by clause 4.3. It provides the objective basis for concentrating effort, so that scarce time and resources are spent where knowledge is both most valuable and most vulnerable, rather than spread evenly and thinly.

Prioritization matters because an engineering consultancy holds a vast amount of knowledge, from routine calculation methods to irreplaceable expert judgement, and cannot manage all of it with equal intensity. By scoring domains consistently, the organization makes a defensible, repeatable decision about where to invest, and can show an auditor why a given domain receives the treatment it does.

Prioritization also protects the organization from two opposite failures. The first is spreading knowledge management so thinly across everything that nothing is managed well; the second is fixating on a single visible domain while a quieter but more vulnerable one erodes unnoticed. A consistent scoring model, applied to every candidate domain and reviewed each year, keeps the organization's attention where the combined value and vulnerability are greatest, and lets it explain and defend that focus to management and to an auditor. The output of this procedure is therefore not merely a list but the allocation key for the whole system: it decides where communities of practice, retention interviews, measurement and improvement effort are concentrated.

2 Scope

This procedure applies to all knowledge domains within the scope of the knowledge management system as determined in QP-01, across all disciplines, offices and project types of [Company Name]. It is performed when the system is established, at each annual review, and whenever a significant change alters the value or vulnerability of the organization's knowledge.

3 References

ISO 30401:2018, clauses 4.3 and 4.4.2. QP-01 Context, Interested Parties and KMS Scope. QP-03 Knowledge Development. Tool T-01 Knowledge Domain Prioritization Workbook. Tool T-05 Critical