MatrixFlows

FREE RESOURCE · KNOWLEDGE MANAGEMENT

Knowledge Governance Kit

Decision rights, source authority, lifecycle, review triggers and a one-page policy template.

Companion to the full guide at matrixflows.com/blog/knowledge-management-governance

How to use this kit. Print it, or copy the tables into your own spreadsheet. Every example row is illustrative; replace it with your own content. The full explanation for each section is in the guide at matrixflows.com/blog/knowledge-management-governance.

01 Who decides what? A decision-rights RACI

R = does the work, A = accountable and has the final say (one per row), C = must be consulted before the decision, I = informed after.

Decision	Author Or Contributor	Content Owner	Subject Matter Expert	Knowledge Lead	Compliance Or Security
Create a new article	R	A	C	I	-
Review accuracy of a change	I	A	R	I	-
Approve a routine change	I	A	C	I	-
Approve a high-risk change (security, legal, billing, safety)	I	R	C	A	C
Publish	I	A	-	I	-
Mark an article verified	-	A	R	I	-
Retire or archive an article	C	R	C	A	I
Resolve conflicting sources	I	C	R	A	C (if risk)
Grant an exception to the policy	-	C	-	A	C
Change the policy itself	-	C	-	R	A or C

Your worksheet: Who decides what? A decision-rights RACI

Decision	Author Or Contributor	Content Owner	Subject Matter Expert	Knowledge Lead	Compliance Or Security

02 Which source wins? A source authority hierarchy

Write the order down. The table below is a sensible default. Adjust it to your business, but keep it explicit.

Rank	Source	Wins When	Typical Lag To Fix
1	The product itself and its release notes	Describing what the product does now	Content must follow it
2	Product specification or engineering documentation	Intended behaviour, limits, supported configurations	Review on each release
3	Policy and legal text (terms, security statements, support policy)	Anything about commitments, data or compliance, which can outrank rank 1 and 2 for what you may say	Compliance approval

Rank	Source	Wins When	Typical Lag To Fix
4	Verified knowledge base articles	Procedures and explanations that a person has checked	Owner review cycle
5	Internal notes, support macros, enablement decks	Never over ranks 1 to 4; use as a source of drafts	Replace with rank 4 content
6	Community answers and forum threads	Never, unless promoted into a verified article by a person	Link to, do not copy from

03 The content lifecycle

A lifecycle is a short list of states, with a named person who can move content from one to the next. Keep it to the states you will actually use.

State	What It Means	Who Moves It On	Exit Condition
Draft	Being written. Not visible to readers.	Author	Author believes it is ready for review
In review	A subject matter expert is checking accuracy	Subject matter expert	Corrections made, or reviewer signs off
Approved	Owner (and knowledge lead or compliance for high-risk) has agreed	Content owner	Preview looks right for the intended audience
Published	Visible to the audience it is intended for	Content owner	A review-due date is set
Review due	The trust window has ended, or a trigger fired	Content owner	Re-verified, updated, or sent to retirement
Retired	No longer valid. Removed from search and assistant answers.	Knowledge lead	Optionally kept as an archived record

Three rules for the lifecycle

Match the review-due window to how fast the topic changes, not to a company-wide default. The windows below are starting points, not recommendations from a study: adjust them against how often your own content actually turns out to be wrong.

Content Type	Starting Review Window (Adjust)	Why
Security, billing, legal, safety	Short, plus every relevant change	Errors cost the most
Product how-tos and configuration steps	Medium, plus every release that touches the feature	Screens and settings change
Concepts and explanations	Long	They change rarely, but check on a major version

Content Type	Starting Review Window (Adjust)	Why
Troubleshooting and known issues	Short while the issue is open, retire when fixed	The fix usually makes the article wrong
Announcements and time-bound notices	Set an expiry when you publish	They are designed to go stale

04 What should trigger a review?

Age alone is a weak trigger. Plenty of articles are wrong the day after a release and still "within date", and plenty of old articles are perfectly correct. Use age as the safety net and events as the main trigger.

Trigger	Source Of The Signal	Scope Of Review	Lane
Product release or change	Release notes, change log, engineering ticket	Every article that mentions the changed feature	Standard, or urgent for a behaviour change
Incident or outage	Incident review, support escalation	Articles giving workarounds, status or guidance	Urgent
Reader flag	"This is wrong" flag, low-rated article, repeated follow-up questions	The flagged article	Standard, urgent if safety, money or security
Policy or legal change	Compliance, legal, contract update	All content that states the policy	Urgent, with compliance as consulted
Review-due date reached	Review window ends	The article	Standard
Owner leaves or changes role	HR or team change	Every article they own	Reassign owner first
Failed answer or content gap	Unanswered or low-confidence questions	Related articles, or a new draft	Standard

05 What is the escalation path for disputed content?

Disputes are normal. A support agent says the article is wrong, the owner says it is right, an engineer says both are partly right. The path should be short and end in a decision with a name on it.

- [ ] **Flag it.** Anyone can flag content. The flag reopens the article for review and notifies the owner.
- [ ] **Owner and subject matter expert resolve it.** They check against the top-ranked source in the hierarchy. Most disputes end here: the hierarchy tells you which source wins.

- [ ] **Knowledge lead decides.** If the owner and the expert disagree, or the sources are of equal rank, the knowledge lead makes the call. Decide within a stated time, and record the reason.
- [ ] **Compliance or security decides, if there is risk.** If the dispute concerns what you may say about security, data handling, legal terms or safety, that team has the final say, whatever the product does.
- [ ] **Record and close.** Log the decision, update or retire the affected articles, and, if the same dispute recurs, change the hierarchy or the policy so it cannot.

06 Keep governance proportionate

Use risk tiers to stay in between:

Tier	Examples	Path
Low	Typo, broken link, clearer wording, new screenshot description	Owner edits and publishes. No separate reviewer.
Standard	New how-to, changed procedure, new feature description	Subject matter expert review, owner approves.
High	Security, data handling, billing, legal, safety, regulated claims	Subject matter expert review, knowledge lead approves, compliance consulted.

07 A one-page knowledge governance policy template

Copy this, fill in the brackets, and keep it to one page. Short enough that people read it is the point.

```
KNOWLEDGE GOVERNANCE POLICY
Version: [1.0]   Owner: [Knowledge lead]   Approved by: [Name, role]   Date: [YYYY-MM-DD]
Next review of this policy: [date]

1. PURPOSE AND SCOPE
This policy covers: [customer-facing knowledge base / internal knowledge base / both].
It does not cover: [e.g. product marketing copy, legal contract text].

2. OWNERSHIP
- Every article has one named content owner and one deputy.
- Owners are assigned by [product area / audience].
- If an owner leaves, the knowledge lead reassigns their articles within [N] working days.
```

3. RISK TIERS
- Low: typos, links, wording. Owner may edit and publish.
- Standard: new or changed procedures. Subject matter expert reviews, owner approves.
- High: [security, data, billing, legal, safety, regulated claims].
  Subject matter expert reviews, knowledge lead approves, [compliance/security] is consulted.

4. LIFECYCLE
Draft > In review > Approved > Published > Review due > Retired.
- Only a person marks an article verified.
- Preview as the intended audience before publishing.
- Every published article has a review-due date.
- Retire, do not delete. Record the reason and any replacement.

5. REVIEW TRIGGERS
Review is triggered by: a product release that affects the article; an incident;
a reader flag; a policy or legal change; the review-due date; an owner change.
Review-due windows: [High-risk: __] [How-tos: __] [Concepts: __] [Time-bound notices: set expiry]
Urgent lane target: [__ working days]. Standard lane target: [__ working days].

6. SOURCE AUTHORITY (highest first)
1) Product and release notes 2) Product specification
3) Policy and legal text (overrides for what we may say) 4) Verified articles
5) Internal notes 6) Community answers (never, unless promoted by a person)

7. DISPUTES AND ESCALATION
Flag > owner and subject matter expert > knowledge lead > [compliance/security] where risk applies.
Decision within [__ working days]. Decision, reason and date recorded on the article.
For high-risk content, unpublish or mark the article while the dispute is open.

8. EXCEPTIONS
Exceptions to this policy are granted by [Knowledge lead], consulted with [compliance/security],
recorded with an expiry date, and reviewed at the next policy review.

9. AI ANSWERS
Only published, approved content is available to the assistant. The assistant does not approve or verify content.
Gaps and wrong answers re-enter the lifecycle at Draft.

10. MEASURES REVIEWED [monthly/quarterly]
Overdue articles, open flags, time to resolve flags, articles without an owner, unanswered questions.