

The Company Brain

Playbook



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How to build the knowledge infrastructure that lets people and AI answer the same question the same way, every time.

Five steps, run per domain. What each step is, what it is for, how to do it, what usually goes wrong, and how to know when you are done. About ten minutes to read. Thirty to ninety days to build the first domain.

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BUILD TIME	30-90 days per domain
READ TIME	~10 minutes

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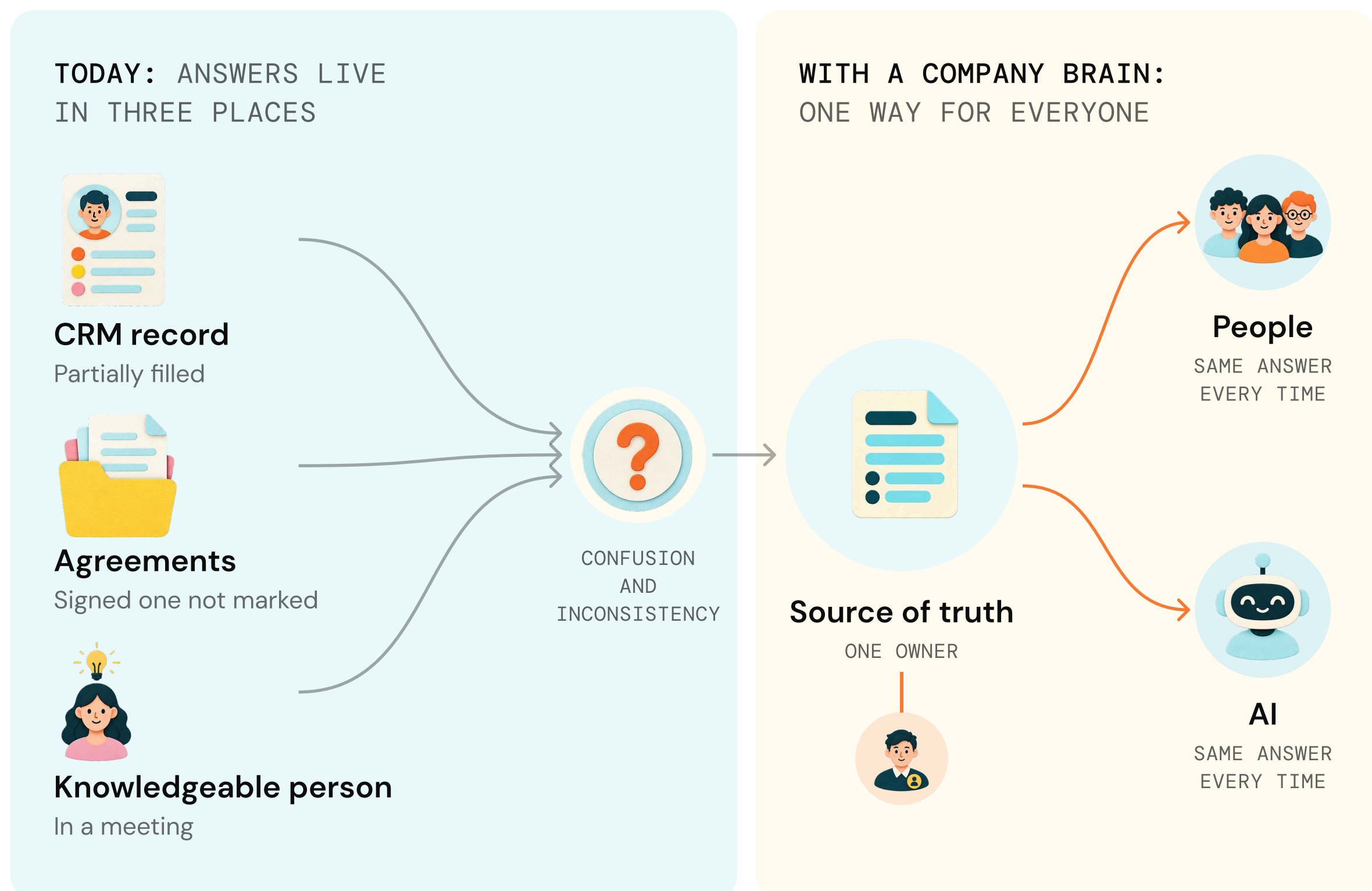
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01 Why you need a company brain

Ask your company one simple question: who is this customer, and what did we agree with them?

In most companies that answer arrives from three places at once. A CRM record that is partly filled in. A folder of agreements where the signed one is not marked. And a person who genuinely knows – and is in a meeting.

A company brain is what ends that. It is the system where every domain of company knowledge – accounts, finance, product, HR – has one source of truth, one owner, and one way to reach it. Everything else references that truth; nothing copies it.





The brain is not an AI project

It is the precondition for every AI project. Every assistant, agent, and automation you are planning runs on your company being able to answer a question once, the same way, twice.

A person handles ambiguity – they know the 2024 version is stale, they know who really owns pricing, they ask someone. An AI cannot. It reads both versions, weights them equally, and picks one – sometimes the wrong one, sometimes a different one tomorrow.

The return, in order of arrival:

- Time people stop losing – every repeated question, every hunt for the current version is a permanent tax on every process. The brain removes it at the source.
- Speed of new capacity – a new joiner ramps by reading, not by interrupting. The same is true of a new AI agent.
- Compounding leverage – each domain you settle makes the next one cheaper.

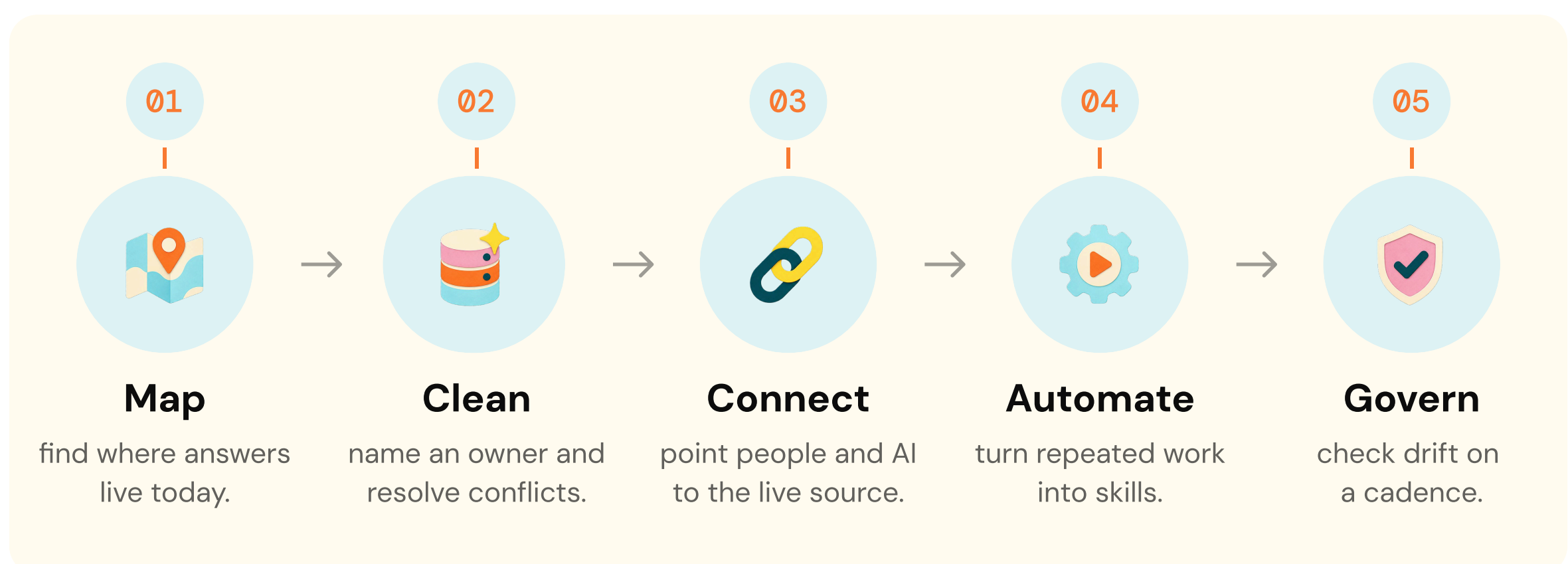
How you measure it:

METRIC	WHAT IT TELLS YOU
Answer time	How long from question to sourced answer, per domain, before and after.

METRIC	WHAT IT TELLS YOU
Re-ask rate	How often the same question gets asked twice. A falling rate is the brain working.
Coverage	Share of domains with a settled truth and a named owner. The leading indicator.
Automation share	How much of each domain's repeatable work runs as skills.

02 Five steps at a glance

Each domain in your company will run through these five steps. You don't need to do this for all domains at once – every domain and team can move at their own pace.



Run them per domain, in order. Do not move to the next step until the current one is genuinely done. A skill built on a domain that is not clean produces wrong answers faster than a person would have.

03 Step 1 – Map

What it is. An honest, domain-by-domain picture of where company knowledge actually lives today – not where it is supposed to live.

Why it matters. Before anything is built, connected, or automated, you need to know what you are working with. The map turns "our data is a mess" into a specific, honest list of what exists, where it lives, and which patterns are causing the most problems.

How to run it. List every domain first. A domain is a bounded area of company knowledge with its own rules, its own owner, its own definition of what counts as true. Example domains: accounts, finance, recruiting, people, sales, projects, legal and contracts, operations, frameworks and best practices. Then ask five questions for every domain:

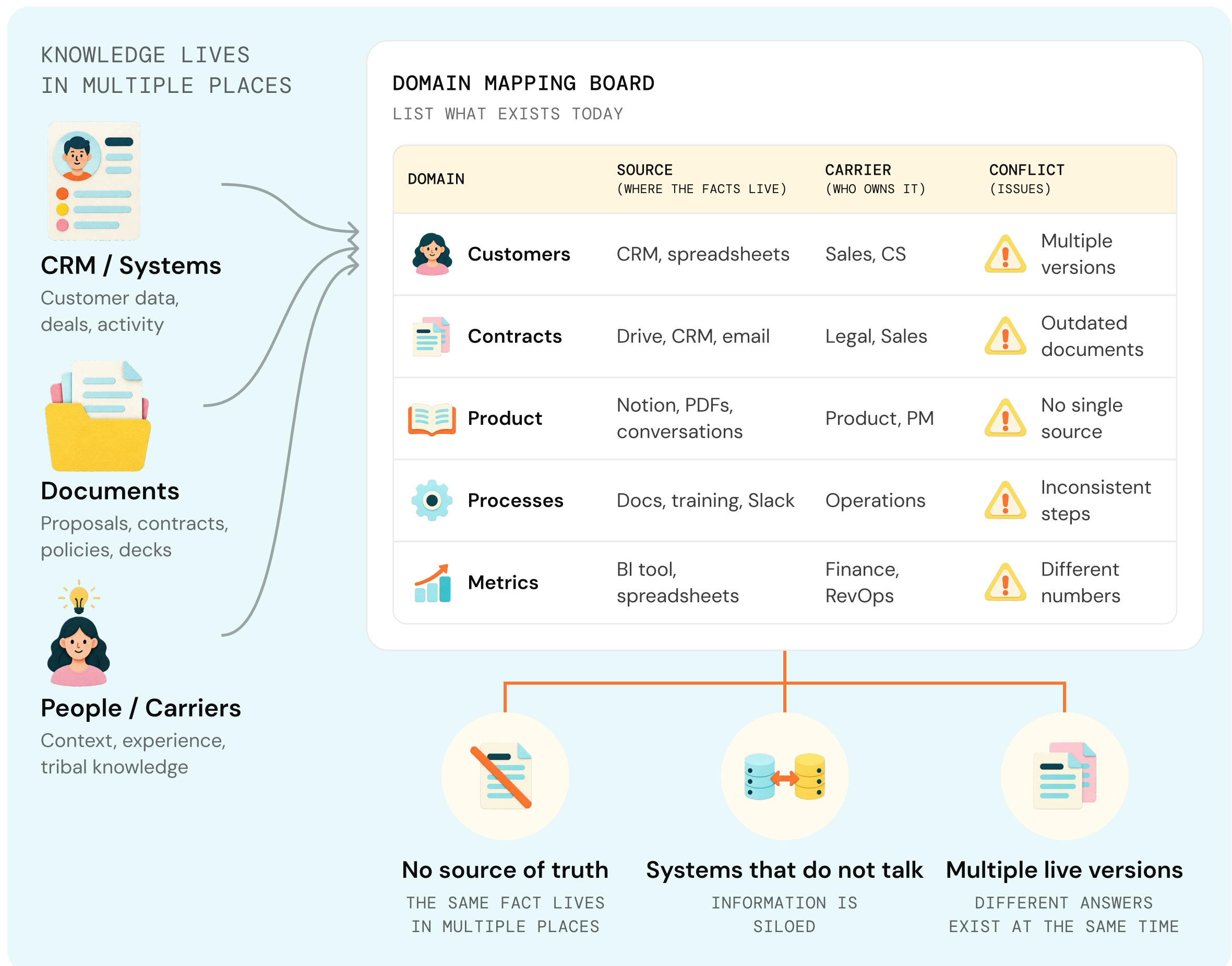
- Where does the answer live today – which systems hold it?
- Who would you actually ask if the system turned out to be wrong?
- If more than one place has an answer, which one wins?
- When was it last confirmed accurate – not created, confirmed?
- If something changes here, does anything update automatically, or does someone have to remember?

**Supporting context is not a source of truth**

Call recordings, emails, chat threads are evidence a conversation happened – not a record of what was decided. Note where they live, then leave them out of this pass.

The three patterns a map reveals:

- No source of truth, only a carrier – the knowledge exists only in someone's head. Every question means re-explaining context from zero.
- Systems that do not talk to each other – a change on one board does not trigger an update on the related one. Two systems that look like one system quietly drift apart.
- Multiple live versions, no pointer to current – three agreements, all plausible, and the only reliable answer is asking the account owner directly.



Where it breaks. Trying to map and fix at the same time. The map's job is to produce a list, not a solution. Every domain gets a row: where the facts live, who the carrier is, which pattern applies. That is the whole deliverable.

How to know it is done. Every domain has a row in the shared board – where the facts live, who the carrier is, which pattern applies.

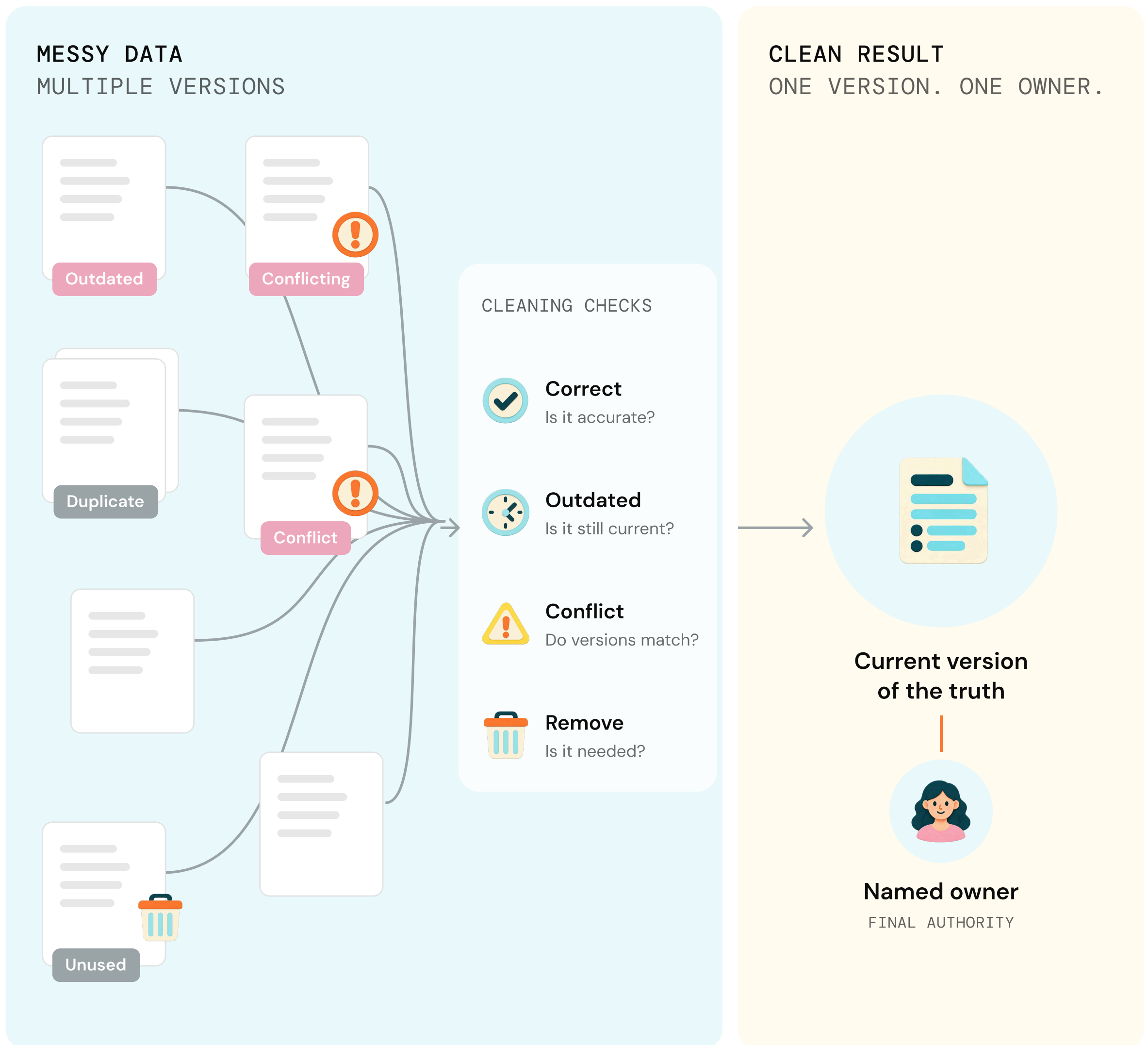
04 Step 2 – Clean

What it is. One named owner per domain, and a source of truth worth trusting.

Why it matters. The map showed you what exists and where the problems are. Clean resolves those problems – one domain at a time, one owner at a time – so that what remains is accurate, current, and attributable to a single person who can say so.

How to run it. Name one owner, not a team. Give the domain one named person – not a team, not a pair splitting it. Their job is to say, with confidence, what is correct, what is outdated, where there is conflict, and what should be removed. Not to have written every entry – to be the one person whose call is final when two things disagree. Then run four checks across the domain:

- What is correct – which records match reality right now.
- What is outdated – a value that was true once and is not anymore.
- Where there is conflict – two things claiming to be true that cannot both be.
- What should be removed – entries nobody is using and nobody can vouch for.



WHAT SEEMS SAFER

- A whole team owns the domain. When three people could answer, none feels obligated to. The ambiguity moves up a level.
- Two people split the domain. The line between halves becomes its own permanent argument.

WHAT ACTUALLY WORKS

One named person with final authority. Imperfect but present beats perfect but undecided – the role can change hands later, the domain cannot stay unowned.

Where it breaks. Waiting for the perfect owner. If there is no obvious person – pick anyway. The role can change hands later. The domain cannot stay unowned in the meantime. Also: trying to pull everything out of someone's head at once. Ask for the specific missing piece, not "tell me everything you know."

How to know it is done. The owner can say what is correct, outdated, conflicting, and removable. One current version of the domain's truth exists.

05 Step 3 – Connect

What it is. A connector is the shared link between a domain's source of truth and every place that reads it – a person's view and an AI's view, pointed at the same record. Not an export. Not a scheduled sync. Not a knowledge base someone re-typed by hand.

Why it matters. A clean domain is still only useful to the people who already know it. Connect makes it reachable – to everyone on the team, and to every AI agent you build – through one shared project that always reads from the live source of truth.

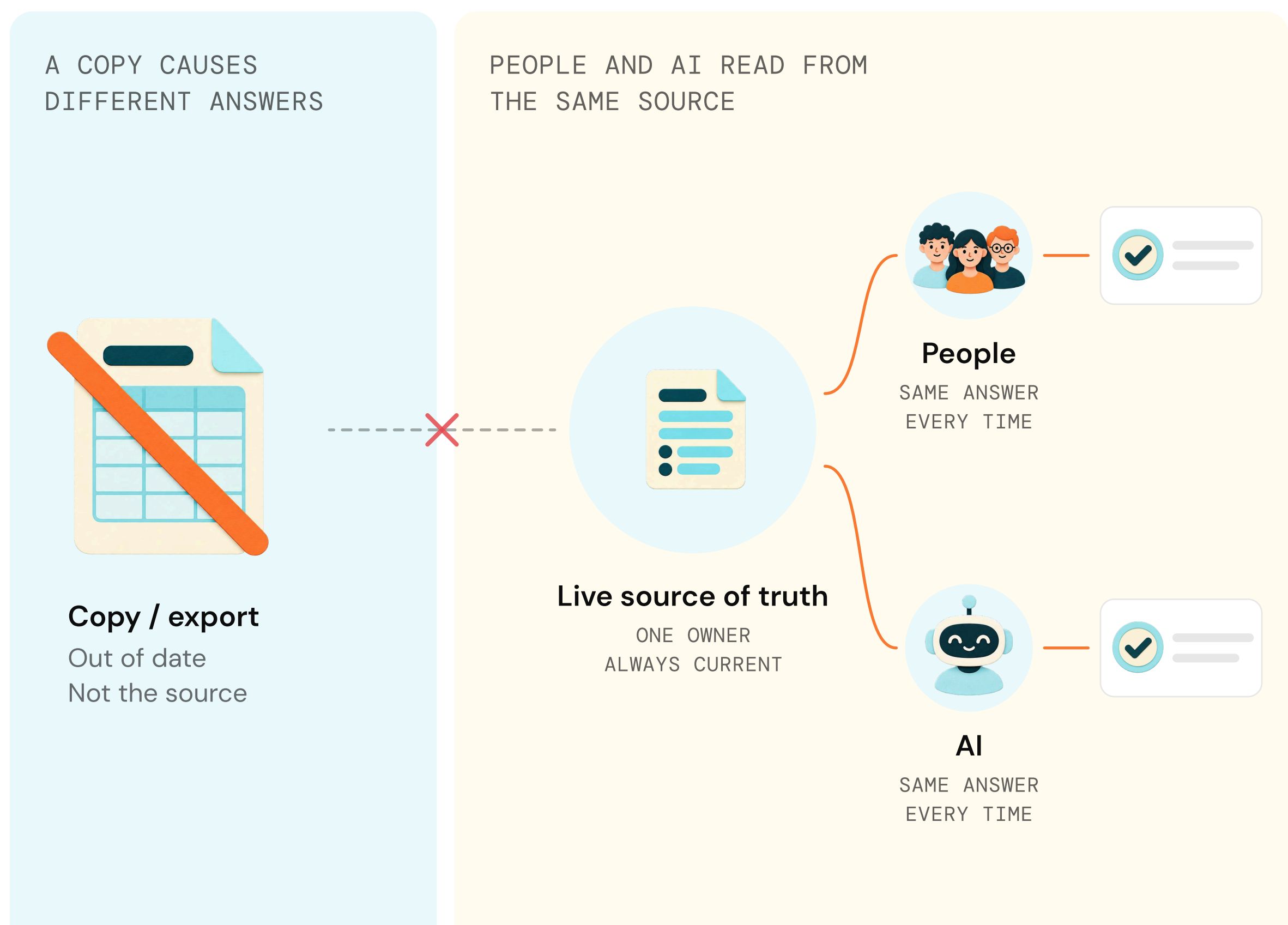
How to do it:

- 01 Confirm the source of truth** – already settled in Clean. Connect does not redefine it.
- 02 Set up your AI tool** – Claude, ChatGPT, Gemini, whichever your company uses.
- 03 Find the connector, or build it** – check what the tool already offers before building anything.
- 04 Build a project for the domain and share it with the team.**
- 05 Check both views match** – ask a person and the project the same question. If the answers differ, something is pointed at a copy.

Where it breaks.

- Connecting to a copy instead of the source – the export drifts from the CRM the same week someone stops updating it.
- Connecting everything at once – a domain-by-domain rollout is slower to look finished but far easier to verify.
- Letting a project's own files become the record – an uploaded spreadsheet works until it goes stale.

How to know it is done. A person and the project give the same answer to the same question about the same domain.



06 Step 4 – Automate

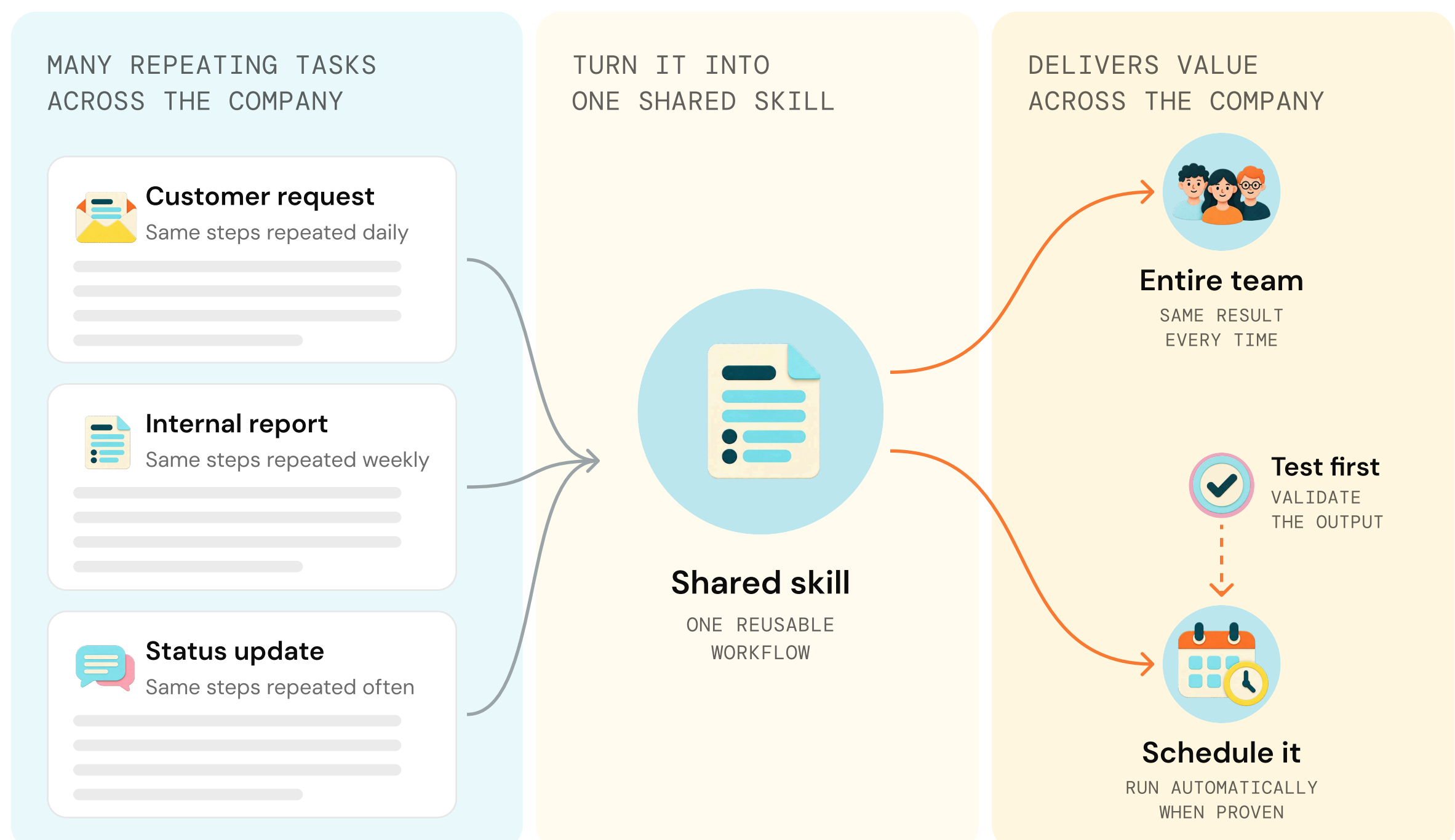
What it is. A skill is a packaged, repeatable way of doing one piece of work inside a domain – written once, run whenever the work comes up, built on the domain's connected source of truth. A scheduled task is the same skill, running without being asked.

Why it matters. A connected domain is ready to work. Automate turns that readiness into actual output – skills that handle the most repeated tasks, and scheduled tasks that deliver results before anyone has to ask. This is where the time savings become visible and measurable.

How to do it:

- 01 **Find the most repeated task** – not the hardest, the most repeated. The task three people could describe the same way.
- 02 **Write down what done well looks like, in the same detail you would give a new hire** – the instructions are the skill.
- 03 **Build it inside the project connected to the domain, so it reads the current source of truth, never a copy.**
- 04 **Test it against real cases before anyone relies on it.**
- 05 **Share it with the whole team** – that is what turns one person's shortcut into a multiplier.

Once a skill earns its keep on demand, decide whether it should run on a schedule. That is the whole difference between a skill and a scheduled task: the same work, running before anyone remembers to ask.



Where it breaks.

- Automating before the domain is clean and connected – wrong answers, faster.
- Keeping a skill to yourself – a shortcut on one person's machine only helps that person.
- Scheduling a task before the skill is proven – errors that a person would have caught now ship silently, on a schedule, with nobody watching.

How to know it is done. Skills are shared across the team. Scheduled tasks are proven before they run automatically.

07 Step 5 – Govern

What it is. The recurring check that keeps a domain trustworthy after the initial build. Where Clean is the one-time pass that makes a domain trustworthy, Govern is what keeps it that way.

Why it matters. A domain that is clean and connected today does not stay that way by default. New records get added without the owner's checks applied. A field starts filling in inconsistently again, three weeks after nobody was watching. Govern is the automated mechanism that catches drift before it corrupts the answers people and AI are relying on.

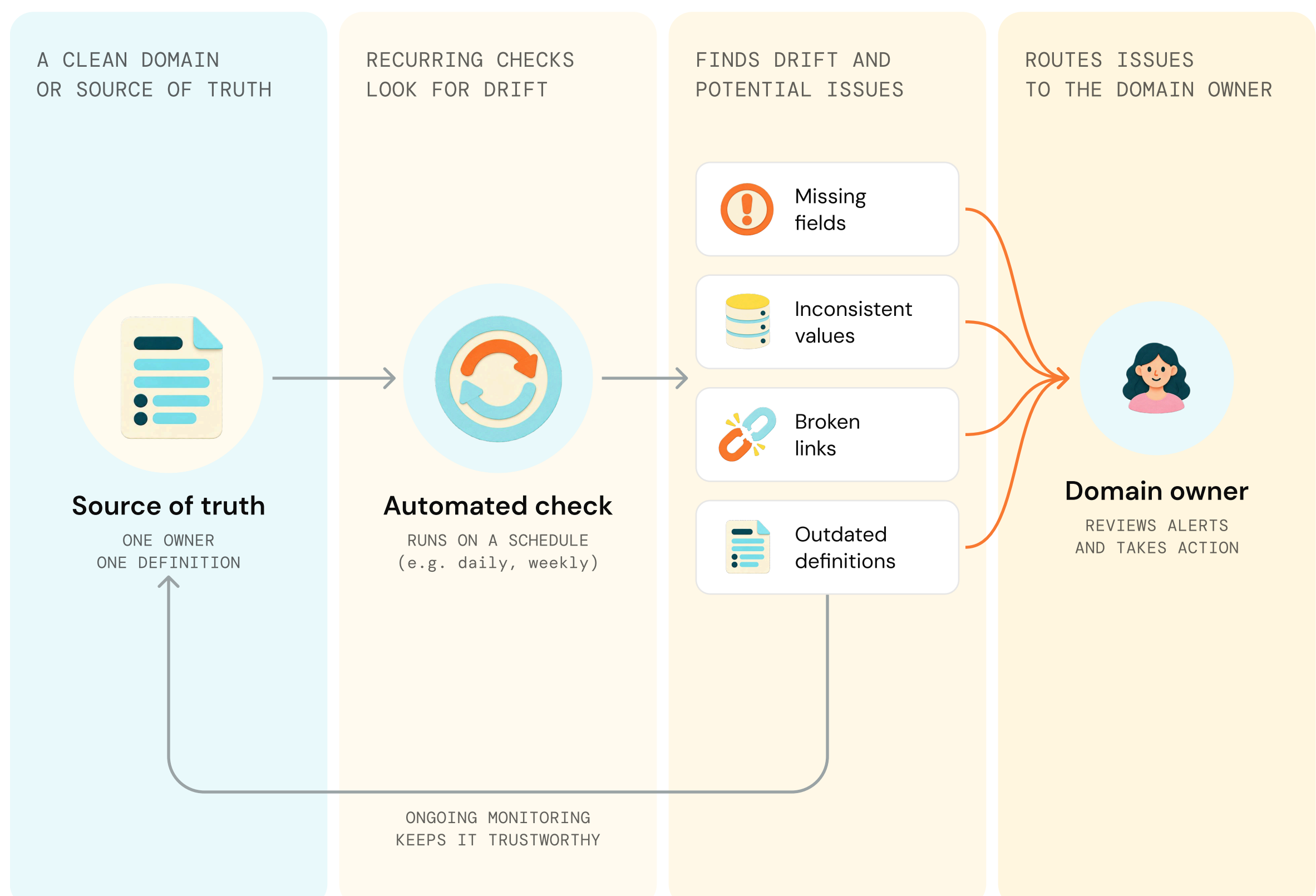
How to do it:

- 01 **Decide what healthy looks like for this domain** – gaps, stale records, stuck items, specifically.
- 02 **Build it as a skill against the domain's connector.**
- 03 **Set its cadence to how fast the domain actually changes** – not a company-wide default.
- 04 **Schedule it, so it runs without anyone remembering to ask.**
- 05 **Route what it finds to the domain owner** – the check surfaces the problem, it does not fix it.

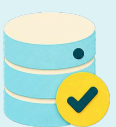
Where it breaks.

- One cadence for every domain – monthly checks on something that changes annually find nothing and get ignored. Noise is what trains people to stop trusting the alerts.
- The brain owner tries to run every check themselves – does not scale past two or three domains.
- Checks nobody acts on – an automated check that flags drift and gets left unread is not governance.

How to know it is done. The check fires on schedule. The owner acts on what it finds.



08 Putting it together

	STEP	DONE WHEN
1	 Map Find and document the data for one domain.	Every domain has a row in the shared board – where the facts live, who the carrier is, which pattern applies.
2	 Clean Fix quality and set basic standards.	The owner can say what is correct, outdated, conflicting, and removable. One current version exists.
3	 Connect Bring it into one trusted place.	Person and project give the same answer to the same question about the same domain.
4	 Automate Keep it updated on a schedule.	Skills are shared across the team. Scheduled tasks are proven before they run automatically.
5	 Govern Set rules, access and ownership.	Check fires on schedule. The owner acts on what it finds.
↓	 One trusted domain Ready for people, AI and real work.	

