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DOCUMENTATION STRATEGY

AGENDA

Goals and objectives

Roles and responsibilities

Timeline and milestones

Tools and Platforms

Training and Support

Monitoring and evaluation

OBJECTIVES

- Preserve institutional knowledge
- Improve training and onboarding
- Enhance workflow efficiency
- Ensure compliance and reduce risk
- Reduce resolution time and improve customer satisfaction

SCOPE

Documentation

- SOPs
- Project processes
- Policies
- Technical manuals
- FAQs
- Call/email/chat response templates
- CRM system guides and ticketing processes
- Escalation protocols and support workflows
- Give customers an empowered user experience

Teams involved

Executive

Management

Sales

Field Services

Support



TOOLS & PLATFORMS

Knowledge base software (ConnectWise)

Shared document repositories (SharePoint, Google Drive, Loop)

CRM-integrated knowledge tools (Project and ticket documentation)

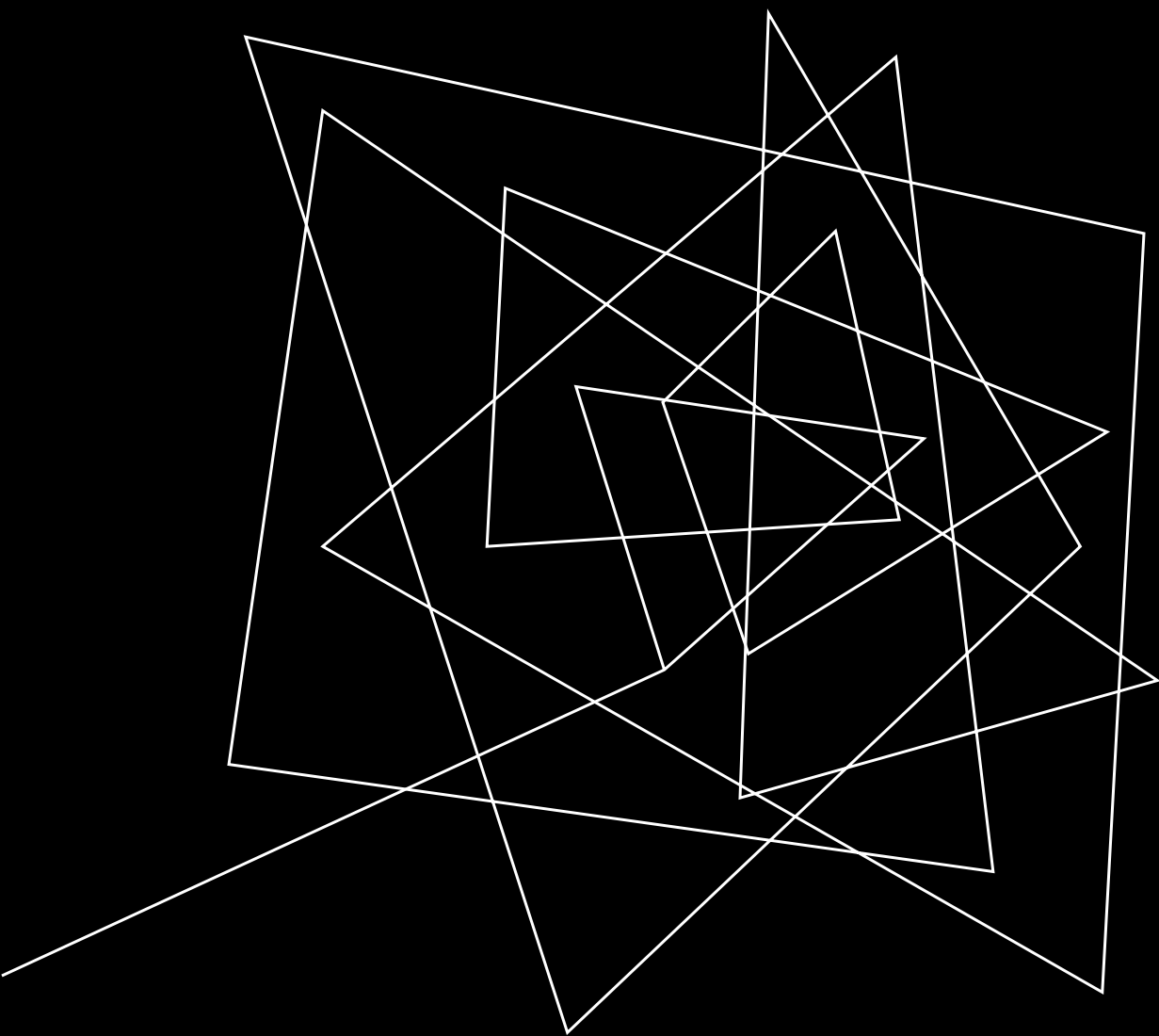


ROLES AND RESPONSIBILITIES

ASSIGN KEY ROLES

Techniques for connecting

- Documentation Lead: Oversees strategy and progress
- Subject Matter Experts (SMEs): Provide content
- Editors/Reviewers: Ensure clarity and consistency
- IT/Platform Support: Manage documentation



STYLE GUIDE & STANDARDS



TIMELINE AND MILESTONES

Set deadlines for

- Weeks 1-2: Initial audit of existing documentation
- Weeks 3-4: Drafting templates and content
- Week 5: Peer reviews and QA
- Week 6: Official rollout – publish initial documentation set
- Ongoing: Monthly updates and reviews

An abstract graphic consisting of two thin, dark grey lines intersecting on a light grey background. One line is oriented diagonally from the top-left towards the bottom-right, while the other is oriented from the top-right towards the bottom-left. The intersection point is located in the upper-left quadrant of the image.

TRAINING AND
SUPPORT

MAINTENANCE AND REVIEW CYCLE

Schedule regular reviews to
ensure documentation
stays current.

METRICS FOR SUCCESS

Track KPIs such as:

- Time saved on onboarding
- Reduction in repeated questions
- Decrease in task errors
- Employee feedback and usability

A series of white, thin, overlapping geometric lines on a black background, creating a complex, abstract pattern on the left side of the slide.

THANK YOU

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