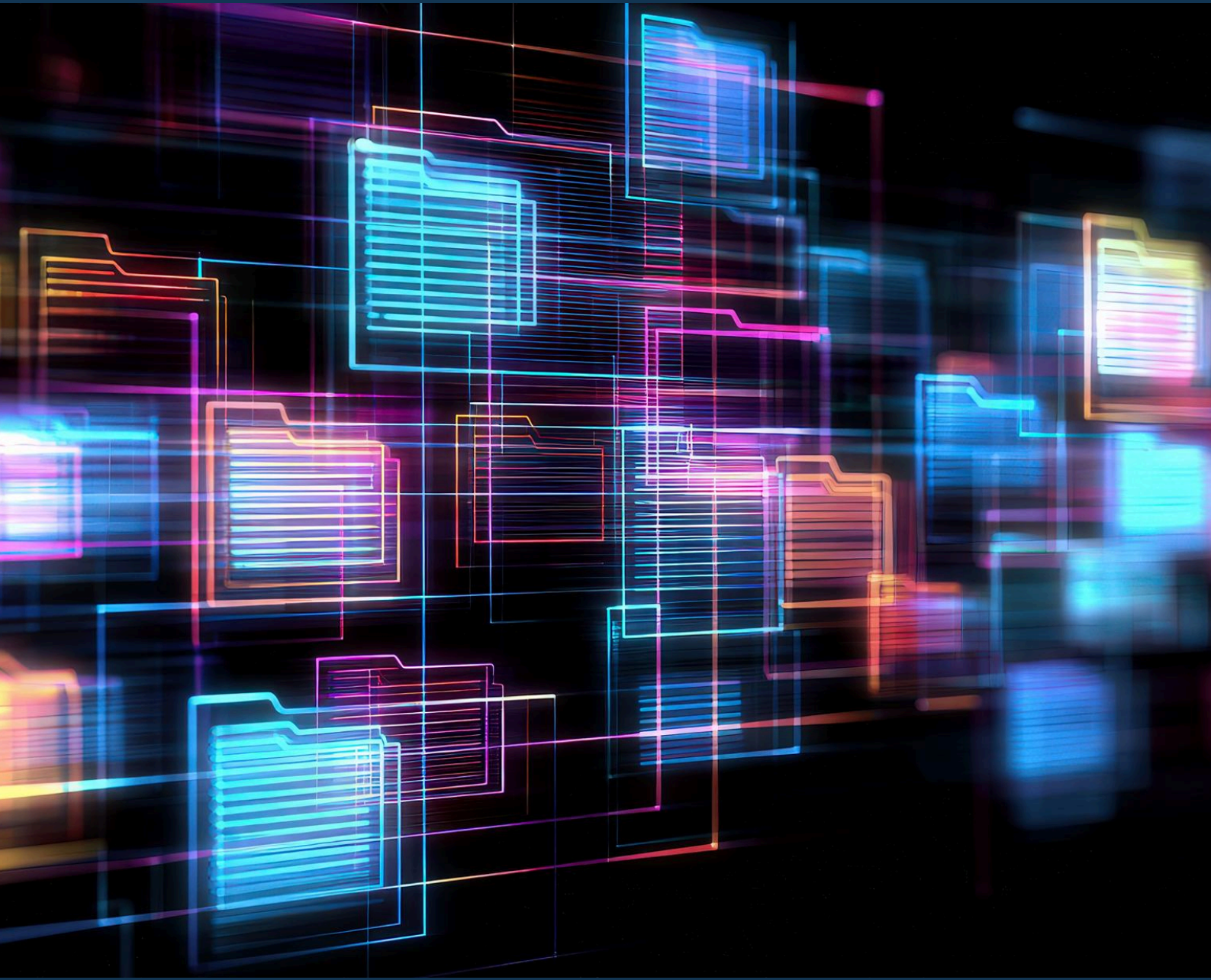


Halderstone



Training module

Documentation & Knowledge Management

Control documented information, records & organisational knowledge so they stay accurate, accessible & usable in management systems



Are scattered or unreliable documents forcing your team to create operational workarounds?

Overview

Organizations often struggle with scattered, unreliable, or hard-to-find documentation, leading to operational workarounds and a drift in management system effectiveness.

This module addresses these challenges by providing a structured approach to document control and knowledge management. Participants will learn the fundamentals of managing documented information, ensuring records are accurate and accessible, and capturing critical organizational know-how. The focus is on building a sustainable information backbone that people actually use, ensuring information remains controlled and searchable without the burden of over-documentation.



Target audience

- Management system implementers and coordinators
- Executives and department heads accountable for management system performance
- Those responsible for processes, policies, assets, risks, and controls related to a management system
- Auditors seeking insights into management-side best practice (not audit technique)
- Management consultants working with management system design, governance, or improvement

Is this module for you?

It is a good fit for you if you...

- are responsible for documentation, records, or knowledge in a management system.
- struggle with scattered documents, multiple versions, or unclear sources of truth.
- face over-documentation nobody uses or gaps that create operational risk.
- need information to be findable, reliable, and usable in daily work.
- want documentation and knowledge to support decisions, learning, and continuity.

It may be less suitable for you if you...

- already operate a lean, well-understood documentation and knowledge approach.
- have no mandate or interest in shaping how information is created or used.
- need tool-specific configuration or document template libraries.
- expect ready-made documentation without adapting it to context and use.

Learning outcomes



Key outcomes

- Establish effective document control processes to ensure information reliability and accessibility
- Manage records systematically to support compliance and operational traceability
- Implement methods for capturing and retaining critical organizational knowledge

Additional capabilities

- Distinguish between necessary documentation and over-documentation to maintain system agility
- Develop a searchable and sustainable information structure that supports day-to-day operations
- Identify and address common pitfalls in documentation management, such as version control issues or information silos

Agenda

What “documented information” covers in practice

How documents, records, and system knowledge function as working assets, and where misunderstandings typically arise that cause control to break down

Common failure modes in organisations

How duplicate sources, outdated templates, uncontrolled sharing, local copies, and shadow procedures undermine documented information and bypass the intended system

Documentation hierarchy and document types

How to distinguish between policy, process, procedure or work instruction, guideline, record, and knowledge artefact, and choose the right level of detail without procedural inflation

Information architecture and findability

How to structure repositories through logical grouping, entry points, and linking, and apply naming conventions and metadata that support reliable retrieval

Lifecycle control that people can follow

How to design creation, review, approval, publication, change control, and archiving in a way that is clear, usable, and supported by defined ownership and authorisation

Records and evidence without drowning in detail

How to decide what to retain, where to store it, and how to keep it traceable, while balancing evidence sufficiency against data minimisation in practical trade-offs

Knowledge foundations

How to identify critical know-how and single-point dependencies, and select appropriate capture formats such as FAQs, checklists, playbooks, and onboarding aids

Technology as an enabler

How to use common platforms effectively based on principles rather than tool administration, and apply AI support for search and summarisation within defined review and access boundaries

Case-based workshop

Applying the learned concepts, methods, and approaches in a realistic case setting

Included materials



Learning materials

- Slide deck
- Participant workbook

Templates & tools

- Documented information inventory
- Document lifecycle checklist
- Naming and metadata guideline
- Knowledge risk checklist
- Knowledge capture template

Confirmation

- Confirmation of participation

Preparation guidance



Assumed background

This module assumes general familiarity with management system concepts and everyday document handling in organisations. No standard-specific knowledge is required.

Helpful background includes:

- Basic understanding of roles, processes, and documented procedures
- Familiarity with shared repositories and versioned documents

Preparatory modules

Supporting (optional)

Helpful but not required to participate effectively

- System Framing
- System Leadership
- Governance Design

Logistics



Available languages

- English
- German

Standard delivery options

- Virtual live teaching
- Blended learning (e-learning + live)

Bespoke delivery options

- On-site delivery at your place
- Content adapted to your organization



Halderstone

Halderstone by Langer & Co

Zürcherstrasse 2
CH-8852 Altendorf
Switzerland

info@halderstone.com
www.halderstone.com