

My Single Source of Truth (SSoT) Architecture Worksheet

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Your Single Source of Truth Starts Here — Before Any Tool

This worksheet is for founders, COOs, and operations leaders who are tired of wasting hours searching for information scattered across drives, emails, and chat apps. It solves the problem of "where to start" by giving you a structured, tool-agnostic framework to audit your current documents and design a clean, scalable information architecture (a deliberate structure for how your company organizes, names, and stores all of its knowledge).

Use it to map out your core information before you commit to any software. The result: a clear blueprint for your company's knowledge base that works regardless of which platform you choose later.

How to use this worksheet: Print it or open it in a PDF editor. Work through each section in order. Fill in the blanks, check the boxes, and make decisions. By the end, you will have a concrete architecture plan you can hand to any team lead or use to evaluate any tool.

Why this matters for your business operations: According to research aggregated from McKinsey, IDC, and Gartner (via Perplexity AI), employees spend approximately 1.8 to 2.5 hours per day searching for information, and poor knowledge management costs organizations an estimated \$10k–\$25k per knowledge worker per year. Designing your information architecture before selecting a tool is the single most effective way to stop that bleeding.

Quick Win: Your 3 Most Critical Documents

Before tackling everything, bring immediate clarity to your most important information. Identify three documents that are either frequently used, frequently lost, or critical to daily operations. These are the documents your team asks about most often or panics about when they cannot find them.

Write them here. You will run each one through every exercise below.

1. Critical Document 1: _____

2. Critical Document 2: _____

3. Critical Document 3: _____

Why start with three? Attempting to reorganize everything at once is the number one reason knowledge management projects stall. These three documents become your proof of concept. If your new architecture works for these, it will work for everything else.

Section 1: The 'Core Four' Audit

Every document in your company fits into one of four categories. This framework — the "Core Four" — helps you see where information naturally clusters and what belongs together. It replaces the chaos of random folder names with a system that makes sense to anyone on your team.

The four categories:

- **Process** — "How we do it." Standard operating procedures (SOPs), workflows, recurring checklists, step-by-step instructions.
- **Project** — "What we're building." Plans, timelines, deliverables, and updates tied to a specific initiative with a start and end date.
- **Principle** — "Why we do it." Company policies, values, brand guidelines, strategic goals, decision-making criteria.
- **People** — "Who does it." Org charts, role definitions, contact directories, onboarding materials, team structures.

Instructions: List your most important documents in the table below. For each one, check the single box that best describes its primary category. If a document seems to fit two categories, choose the one that answers the question "What would someone search for this under?"

Document Name / Description	☐ Process	☐ Project	☐ Principle	☐ People
<i>e.g., "Q4 Marketing Plan"</i>		☒		
<i>e.g., "Employee Onboarding SOP"</i>	☒			
<i>e.g., "Brand Voice Guidelines"</i>			☒	
1. _____	☐	☐	☐	☐
2. _____	☐	☐	☐	☐
3. _____	☐	☐	☐	☐

Document Name / Description	☐ Process	☐ Project	☐ Principle	☐ People
4. _____	☐	☐	☐	☐
5. _____	☐	☐	☐	☐
6. _____	☐	☐	☐	☐
7. _____	☐	☐	☐	☐
8. _____	☐	☐	☐	☐
9. _____	☐	☐	☐	☐
10. _____	☐	☐	☐	☐

Quick count:

- Total Process documents: ____
- Total Project documents: ____
- Total Principle documents: ____
- Total People documents: ____

What your count tells you: If one category is dramatically overloaded and another is nearly empty, that imbalance reveals where your organization's knowledge is either over-documented or dangerously undocumented. Both are problems. An empty "Principle" column, for example, usually means decisions are being made without a documented rationale — which makes onboarding new leaders extremely difficult.

Outcome: You now have a high-level map of your company's core knowledge assets, organized by function rather than by the random folder structure someone set up three years ago.

Section 2: The 'Access vs. Archive' Decision Tree

Not all information deserves a spot in your daily workspace. Digital clutter (outdated files, completed project plans, superseded policies) is one of the main reasons teams cannot find what they need. This decision tree helps you sort every document into one of three destinations: active workspace, long-term storage, or the bin.

For each document from Section 1, answer these three questions in order:

Question 1: Is this information required to complete a currently active task or project?

- ☐ **Yes** → It belongs in the **ACCESS Layer** (your active, primary workspace). It needs to be instantly searchable and available to anyone who needs it.
- ☐ **No** → Go to Question 2.

Question 2: Is there a legal, financial, or compliance reason to retain this information?

Note: retention requirements vary by jurisdiction and industry. Common examples include tax records, employment contracts, and audit trails. If you are unsure, consult your legal or finance team before deleting.

- ☐ **Yes** → It belongs in the **ARCHIVE Layer** (secure, long-term storage). It needs to be retrievable but does not need to be in your daily search results.
- ☐ **No** → Go to Question 3.

Question 3: Does this document contain valuable historical context that might inform future strategy or decisions?

- ☐ **Yes** → It belongs in the **ARCHIVE Layer**.
- ☐ **No** → **Consider deleting.** If it is not active, not required for compliance, and has no future value, it is digital clutter. Removing it makes your actual knowledge easier to find.

Record your decisions here:

Document Name	ACCESS	ARCHIVE	DELETE
1. _____	☐	☐	☐
2. _____	☐	☐	☐
3. _____	☐	☐	☐
4. _____	☐	☐	☐
5. _____	☐	☐	☐
6. _____	☐	☐	☐
7. _____	☐	☐	☐
8. _____	☐	☐	☐
9. _____	☐	☐	☐
10. _____	☐	☐	☐

Outcome: You have made a clear decision on what stays in your primary workspace and what does not. This prevents your knowledge base from becoming a digital junkyard where important documents are buried under years of irrelevant files.

Section 3: Your Naming Convention Builder

A naming convention (a standardized rule for how every file is titled) is the single most underrated element of a scalable information system. Without one, the same document type might be called "Marketing Plan," "mktg_plan_FINAL," "MP-v2-REVISED," or "John's version" — making search nearly useless.

A good naming convention has three qualities: it is predictable (anyone can guess the file name), it is sortable (files appear in logical order in any list view), and it is enforceable (simple enough that people actually follow it).

Step 1: Choose your components.

Select 3 to 5 components from the list below, or define your own. Put them in the order that makes the most sense for how your team searches for files.

Component	Example	Your Choice
Date	YYYY-MM-DD	_____
Core Four Category	PROC, PROJ, PRIN, PEOP	_____
Department or Team	MKT, ENG, OPS, HR	_____
Project or Client Code	ACME-Q4, BETA-LAUNCH	_____
Document Type	SOP, PLAN, RPT, GUIDE	_____
Short Description	Weekly-Sales-Review	_____
Version	v1, v2, v3	_____

Step 2: Assemble your convention.

Write out your standard format:

Step 3: Write a real example using your convention.

Reference example: 2024-03-15_PROJ_MKT_ACME-Q4_RPT_Weekly-Sales-Data_v3.xlsx

Step 4: The enforcement question.

A naming convention only works if people use it. Decide now:

- ☐ We will include the naming convention in our onboarding materials for new hires.
- ☐ We will appoint one person per department as the "naming standards owner."
- ☐ We will do a monthly 15-minute audit of new files to check compliance.
- ☐ Other enforcement method: _____

Outcome: You have a clear, enforceable rule for naming all future documents. This is the foundation of a system that remains searchable as you scale.

Section 4: Real-Life Scenario — "What About Slack Conversations?"

One of the most common traps in knowledge management: important decisions and final files live only in chat messages. Two weeks later, nobody can find them. The search function in most chat tools is not designed for long-term retrieval, and conversations get buried under thousands of newer messages.

The rule to adopt:

If a decision is made or a final file is shared in a chat message, it is the responsibility of the person who owns that decision or document to formalize it within your SSoT. A chat message is a conversation, not a destination.

Apply it now. Think of the last important decision that was made in Slack, Teams, or any messaging tool but never documented elsewhere.

- What was the decision? _____
- Which Core Four category does it belong in? ☐ Process ☐ Project ☐ Principle ☐ People
- Where should it live in your SSoT? _____
- Who is responsible for documenting it? _____

What most people underestimate: The problem is not that people are lazy. The problem is that there is no clear rule about what gets formalized and who does it. Once you set this rule, chat becomes what it should be — fast communication — and your SSoT becomes the actual record of your company's knowledge.

Section 5: Your Migration Priority Planner

You now have a categorized, tiered, and naming-ready architecture. The next question is: where do you start the actual migration? Trying to move everything at once is how knowledge management projects fail. This planner helps you choose one pilot area and set a realistic timeline.

Step 1: Choose your pilot.

- ☐ One department (which one? _____)
- ☐ One project team (which one? _____)
- ☐ One document category from the Core Four (which one? _____)

Step 2: Set realistic milestones.

Migration is never instant. Expect a ramp-up period of approximately 2 to 4 weeks for the pilot team to adjust to the new structure. Factor in time for questions, resistance, and refinement.

Milestone	Target Date	Owner	Done?
Audit pilot area documents using Core Four	_____	_____	☐
Apply Access vs. Archive decisions	_____	_____	☐
Rename files using new naming convention	_____	_____	☐
Move files to new folder structure	_____	_____	☐
Communicate new system to pilot team	_____	_____	☐
Two-week check-in: gather feedback	_____	_____	☐
Refine and prepare for wider rollout	_____	_____	☐

Step 3: Define success for the pilot.

How will you know it worked? Check all that apply and fill in your own metric if relevant.

- ☐ Team members can find key documents without asking someone else.

- ☐ New files are being named according to the convention without reminders.
- ☐ The team reports spending less time searching for information.
- ☐ No critical document has been lost or misfiled in the pilot period.
- ☐ Other: _____

Outcome: You have a concrete, time-bound plan for implementing your new architecture, starting small enough to succeed.

Why This Matters for Building a Scalable Business

Every growing company hits a point where informal knowledge sharing breaks down. What worked when you had five people in one room stops working at fifteen, and completely collapses at fifty. According to research aggregated from McKinsey, IDC, and Gartner (via Perplexity AI), Fortune 500 companies lose an estimated \$31.5 billion annually by failing to share knowledge effectively. Smaller organizations feel the same pain at a different scale — lost files, duplicated work, onboarding that takes weeks instead of days.

Designing your information architecture before choosing a tool is the most cost-effective step you can take. It costs nothing but focused time, it works with whatever platform you already use or will buy later, and it ensures that your knowledge base scales with your team rather than against it.

Your Next Steps

Step 1 — Put your architecture to work online.

Use the completed worksheet to evaluate any knowledge management tool against your actual needs. Read the full guide on designing a Single Source of Truth architecture at patrick-thoma.com for deeper context, templates, and implementation examples.

Step 2 — Start your pilot this week.

Pick the department or project team you identified in Section 5. Schedule a 30-minute kickoff meeting, walk the team through your Core Four categories and naming convention, and set the milestone dates. The best architecture is useless until one real team starts using it.

Save or print this worksheet. It is your foundational guide for building an organized, scalable business — and the reference document your team leads will need when rolling out the system beyond the pilot.

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Information portal for founders and operations leaders building scalable businesses.

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