bevel & sloane

FIELD MANUAL SERIES
B&S-R04

KNOW HOW

FREE WORKSHEET

OPERATIONS ARCHITECTURE · FIELD MANUAL 04

THE TRIBAL KNOWLEDGE *Risk Map*

A worksheet to find the people and processes you cannot afford to lose, score the exposure, and decide what to document first.

1. Inventory what lives in heads
2. Score impact and concentration
3. Plot the 2×2 risk matrix
4. Act on each quadrant

DOCUMENT	VERSION	ISSUED	FORMAT
B&S-R04	1.0	November 2026	Worksheet

STEP 1 · INVENTORY

WHAT LIVES IN SOMEONE'S HEAD?

List the processes, relationships and know how that would stall if one person left tomorrow. Use these prompts to find the ones nobody thinks to write down.

- ○ Who do people go to when a key system or tool breaks?
- ○ Which customer or vendor relationships run through one person?
- ○ Which tasks only happen monthly, quarterly or yearly?
- ○ Whose vacation causes work to pile up?
- ○ Which spreadsheets or workarounds does only one person understand?

42%

of institutional knowledge is unique to one person's role.

Panopto survey via HR Dive, 2018.

Impact if lost. 5 revenue or customers stop · 4 major delay or compliance exposure · 3 noticeable slowdown · 2 minor workaround · 1 barely noticed.

Concentration. 5 only one person · 4 one person plus a partial backup · 3 two people · 2 three or four people · 1 documented and widely known.

#	PROCESS OR KNOWLEDGE AREA	WHO HOLDS IT	BACKUP	DOCUMENTED	IMPACT	CONCENTRATION
1				Y·P·N	12345	12345
2				Y·P·N	12345	12345
3				Y·P·N	12345	12345
4				Y·P·N	12345	12345
5				Y·P·N	12345	12345
6				Y·P·N	12345	12345
7				Y·P·N	12345	12345
8				Y·P·N	12345	12345
9				Y·P·N	12345	12345
10				Y·P·N	12345	12345

STEP 2 · PLOT

THE RISK MATRIX

Write each row number from page 02 into its quadrant. Scores of 4 or 5 count as high. Anything in the top right is a single point of failure.

IMPACT IF LOST · LOW TO HIGH

PROTECT **High impact, shared** Important and known by several people. Keep the documentation current and the backups trained.	ACT NOW **High impact, concentrated** One person holds something the business needs. Document and cross train within 30 days.
MONITOR **Low impact, shared** Low risk today. Recheck when the team or the process changes.	CROSS TRAIN **Low impact, concentrated** Not critical, but fragile. Add a second person when there is slack.

1 · WIDELY KNOWN — CONCENTRATION · LOW TO HIGH — 5 · ONE PERSON

ACT NOW LIST

#	PROCESS	SUCCESSOR	BY

NOTES ON PATTERNS

NEXT STEPS

WHAT TO DO WITH YOUR *results*

Most teams find two or three items in the Act now quadrant, and they are rarely a surprise. The value of the map is that it turns a vague worry into a short, named list with dates.

01 **Act now: shadow and document within 30 days**
Sit with the person who holds it and record the work as they do it. Turn the notes into an SOP and have a second person run it once.

02 **Protect: put the SOP on a review cycle**
The knowledge is shared today, but it drifts. Give it an owner and a quarterly review date.

03 **Cross train: pair when there is slack**
Add a backup during a quiet period. Record the walkthrough so the next person learns faster.

04 **Monitor: rerun this map twice a year**
And again any time a key person gives notice, changes roles, or a major system changes.

FREE CALL

BOOK A DISCOVERY SESSION

BRING YOUR RESULTS TO A DISCOVERY SESSION.

We will walk through your scores together, name the two or three fixes that matter most, and tell you plainly whether you need outside help or can run the fix in house.

BOOK ONLINE
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