

Build an Ai Memory for Your Business

Building your business's AI knowledge system

- 1 Inventory all critical business knowledge: policies, workflows, and client histories.
 - 2 Audit and clean your data before selecting any AI memory tool.
 - 3 Choose an AI memory tool with strong API and Zapier integration support.
 - 4 Connect your AI memory to all company tools: email, CRM, project management.
 - 5 Establish a process: update AI memory whenever policies or playbooks change.
 - 6 Train your team to query AI memory as their first information source.
 - 7 Tag and date all knowledge entries with clear ownership and metadata.
 - 8 Review search quality monthly and remove outdated or duplicate information.
 - 9 Assign one person to oversee data hygiene and source material updates.
 - 10 Start with a pilot team to test adoption before company-wide rollout.
 - 11 Document how your team uses AI memory to identify gaps and improvements.
 - 12 Set a quarterly review to measure productivity gains and ROI.
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