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Document standardisation: highway to sharing

TAL
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This knowledge pill examines the issue of document standardisation, which is a critical requirement for the effective and efficient knowledge documentation in organizations.

The pill intends to underline the importance of standardising documents to facilitate content writing and understanding. It also provides some suggestions on how to create a structured format (template) and use metadata to make knowledge documentation more really effective.

Standardisation



Source: Photo by [2H Media on Unsplash](#)

- Standardisation: set of procedures to establish and maintain consistent formats and terminologies
- Standard templates, formats and writing styles for the different types of documents
- KIBS companies produce lots of documents that can be standardised:
 - emails
 - bids
 - tickets
 - presentations
 - projects data
 -
- Standardised documents are clear, coherent and easy to understand



Document standardisation concerns creating and maintaining consistent formats and terminologies.

Documents standardisation consists in establishing, and using on a regular basis, standard templates, formats and writing styles for the different types of documents produced by a company, such as emails, letters, bids, tickets, presentations, invoices, projects data.

Document standardisation ensures that all documents produced by an organization are clear, coherent, and easy to understand.

Document standardisation



Source: Photo by [Pexel on Pixabay](#)

Standardisation offers several benefits:

- Increased efficiency
- Reduced confusion
- Increased document traceability
- Adoption of a common language
- Increased documentation
- Better document management

Document standardisation offers several benefits to the company. First, it can help to reduce errors, save time, and improve the overall efficiency of document processes. , In particular, employees no longer have to waste time searching for or figuring out how to format documents. Second, it contributes to reduce the confusion creating by dealing with documents having similar content but different format. Third, through the use of metadata, standardisation improves the traceability of documents. Fourth, standardisation induce employees to avoid jargons thus favouring the use a common language, which promotes internal knowledge sharing. Fifth, standardisation can help making the documentation activity a natural part of the daily work. Summing up, document standardisation allows you to properly organize all documents. Therefore, it simplifies document retrieval, secures access control, and improves overall document management.

Problems raised by missing standardisation



Source: Photo by Oladimeji Ajegbile on [Pexel](#)

An ineffective document standardisation may lead to:

- Wasting time when writing documents
- Wasting time when reading documents
- Omitting crucial data and information
- Making mistakes
- Using different jargons
- Making the document reading and understanding difficult
- Hindering an effective document classification

Conversely, missing standardisation may raise several problems.

First, employees may spend a lot of time copying and pasting things like letter heads or thinking about the correct format and writing style to use for each type of document.

Second, employees may spend time in identifying and searching the elements of useful knowledge contained in the document they are reading.

Third, employees may omit or forget to include in the document crucial data and information that can be of use in the future.

Fourth, there is room for human error, such as mistakes that might occur when copy and pasting data or spelling and grammar errors when a totally new document is written.

Fifth, document writers are allowed to use sectoral jargons denoted by a lot of specific and unshared terms.

Sixth, the above problems make it particularly difficult to read and understand the document.

Lastly, missing standardisation make difficult to catalogue and categorise documents, which implies they are less readily accessible to everyone within the company.

Causes of missing standardisation



Source: Photo by Yan Krukau on [Pexels](#)

- Companies use different kinds of documents (e.g., doc, excel, ppt, pdf, mails, photos, videos, ...)
- Documents are produced by many people having different technical and educational background
- Different systems/tools allow for different format/template
- Employees can be reluctant to follow a standard since they prefer to be free
- Standardisation may inhibit creativity
- A standard needs continuous maintenance



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The experience of businesses shows that lack of standardisation may derive from various causes.

- Companies use different kinds of documents (e.g., doc, excel, ppt, pdf, mails, photos, videos, ...)
- Documents are produced by many people having different technical and educational background, denoted by the use of specific terminology
- Different systems/tools allow for different format/template
- Employees can be reluctant to follow a standard since they prefer to be free
- Standardization may inhibit creativity, in that it leads to thinking according to predetermined schemes
- A standard needs continuous maintenance, given that knowledge that has to be documented is constantly evolving

Basics of an effective standardisation



Source: Photo by Andrea Piacquadio on [Pexels](#)

An effective standardisation should make documents:

- Useful
- Usable
- Used



In this perspective, the 3U rule (Useful, Usable, Used) is appropriate. It is applied to the standardisation of industrial documentation by answering 3 questions:

Useful: the document must meet a need. It must be a tool for carrying out an activity and achieving the predefined results.

Usable: the document must be perfectly legible, practical, easy to access and easy to apply.

Used: the document must actually be used by the employee for whom it is intended, in his/her workstation.

Steps of an effective standardisation (1)



Source: Photo by Gerd Altmann on [Pixabay](#)

1. Define scope and goal
2. Develop a set of standards
3. Establish document control procedures

An effective standardisation process includes the following six steps.

1. Define the scope and purpose. Before starting the document standardisation process, the team should clearly define the scope of the effort. This also includes what types of documents need to be standardised. Good planning ensures that everyone involved in the process has a shared understanding of the goals and objectives.

2. Develop a set of standards. At this step, the organization will create templates, guidelines, and best practices for document creation, editing, and storage. It is essential to involve all relevant stakeholders in developing these document standards to ensure that the established standards are practical among all stakeholders.

3. Establish document control procedures. This includes procedures for version/revision control, approval processes, and security measures to ensure that only authorized individuals can access and modify documents.

Steps of an effective standardisation (2)



Source: Photo by Gerd Altmann on [Pixabay](#)

4. Communicate to employees
5. Implement the standards
6. Monitor and evaluate
7. Maintain the standardisation

4. Communicate to employees. Communication ensures that all employees understand the purpose and importance of document standardisation and know how to comply with the new standards. In this regard, the organization may provide training sessions, online courses, and written instructions.

5. Implement the standards. Start using the standardised document templates, guidelines, and procedures. It is essential to ensure that everyone within the organization uses the same formats, terminologies, and procedures.

6. Monitor and evaluate. Regularly review the standards and procedures to ensure that they are effective and make changes as necessary. The organization can do this by conducting surveys, reviewing metrics, and gathering employee feedback.

7. Maintain the standardisation. Following the implementation and evaluation process, the organization should monitor compliance and provide support to maintain the standards. In addition, we recommend having an annual review and update on standards. This help sustain your effort.

Templates



Source: Photo by Alexander-Suhorucov on [Pexel](#)

Used to standardise different kinds of documents

Serve as a starting point for a new document

Characteristics of effective templates:

1. Comprehensiveness
2. Minimalism
3. Clear customization area
4. Standard naming system



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Templates are used to standardise many kinds of documents, as for instance written documents, excel tables, emails, presentations. They serve as a starting point for editing a new document. A template takes time to be build, and it's easy to wonder if it is worth the investment. Editing a template is much faster than formatting something from scratch. Using a template means you're less likely to leave out key information. Templates also guarantee consistency.

Here are some guidelines to create effective templates.

First, templates should be comprehensive. It's easier to delete information than add it in. In this way, you don't run the risk of leaving important data and information out.

Second, templates should be minimalist, in the sense that they should not include redundant information, which could burden their use.

Thirds, templates should make customization areas clear.

Fourth, use a standardised naming system for templates. This will make the naming of the final document and its traceability easier

Metadata



Source: Photo by [krakenimages](#) on [Unsplash](#)

Used to describe knowledge by its attribute.

Help to structure knowledge repositories so that documented knowledge is easier to locate

Three categories:

- Steward
- Business
- Artifact

Metadata searches are based on a pre-defined classification schema



Taxonomy and metadata are key pieces of the enterprise content management toolkit. These tools help structure content repositories so that employees can find what they need efficiently.

In particular, metadata is used to describe knowledge by its attributes and to provide the context, quality, condition or other characteristics of knowledge assets.

A possible classification identifies three categories of metadata.

- Knowledge steward metadata concerns people associated with the knowledge. Some examples are as follow: Knowledge Recorder/Creator, Knowledge Maintainer, Knowledge Approver, Last Review Date, Next Review Date.
- Business metadata regards business unit and function of the knowledge. Some examples are as follow: Business Unit; Business Function, Business Location, Knowledge Class.
- Artifact metadata is related to artifact name, location, format, audience, and so on.

Metadata searches are based on a pre-defined classification schema and can be done through automated functions. Results of these searches are typically very good.

Summing up



Source: Photo by Wonderlane on [Unsplash](#)

- Document standardisation offers several benefits, but it takes time, hence a careful evaluation is needed
- Standardisation formats vary with the type of document
- Management context must be considered:
 - Organizational structure and procedures
 - Available resources
- Templates are freely available
- Metadata facilitates retrievability
- Maintenance is absolutely needed



Summing up, , document standardisation offers several benefits, but it takes time and effort to be done effectively. Hence a careful assessment is required regarding which documents to standardise, with which modalities, and using which tool.

The choice of what and how to standardise must take into account that:

- Standardisation formats vary with the type of document, so there is no one best format to adopt
- Effective standardisation must be aligned with the management context, that is with:
 - Organizational structure, processes and procedures
 - Available resources, both human and technical
 - Kind of knowledge to be documented
- Some useful templates are freely available, so companies can save time by using them
- Metadata are indispensable to make document easily retrievable and usable
- Standards may become obsolete so maintenance is absolutely needed.

Sources and find out more!

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