

SABERRA

Implementation Playbook

Your first 28 days with Sera

Sera becomes trustworthy not through technology alone, but through the care your team takes in what you give her. This playbook is your guide to building an institutional memory that your organization will actually trust and use.

We have seen what kills knowledge systems. We built the fix into the process. Read this before your first session.

BEFORE ANYTHING ELSE

The single rule that makes everything else work

Every knowledge system Saberra has seen fail made the same mistake: the organization tried to import everything before they could trust anything. The archive went in, the queue flooded, nobody reviewed it, and the system became another expensive graveyard.

Saberra works differently. The goal of your first four weeks is not volume. It is trust. If Sera gives your team one accurate, source-backed answer in week one, adoption follows. If she gives a wrong answer because you imported three years of stale meeting notes, trust collapses before it starts.

The one rule: *Sera is a current institutional memory, not an archive. Feed her accordingly.*

This rule should become part of how your team talks about Sera. Say it in your first session. Repeat it when someone suggests uploading an old folder. It is the simplest quality control you have.

What trust-first implementation means in practice

1

*Start small.
20 strong records beat 200
questionable ones.*

2

*Start current.
The last 90 days is your only
scope in month one.*

3

*Start reviewed.
Nothing enters Sera without a
human decision to send it.*

You can always add more. You cannot easily repair a broken foundation. An organization that spends four weeks building 80 clean, reviewed records will trust Sera for years. An organization that spends four hours importing everything will spend months correcting it, if they bother at all.

The 90-day rule: During your first implementation phase, only import from the last 90 days of organizational life. Historical content older than 90 days enters only if it is foundational and still active today: founding agreements, current operating agreements, active policies, governance documents still in force.

WHAT WE PROTECT YOU FROM

The five ways knowledge systems fail, and how we prevent each one

These are not hypothetical risks. They are the five patterns Saberra has watched kill implementations before they got started. Your process was designed to pre-empt all five.

PATTERN 01

The Archive Dump

Someone uploads years of old meeting notes in one session. The review queue floods. Nobody reviews it. The system becomes noisy before it becomes useful.

Our fix: 90-day scope rule. One item at a time during training sessions.

PATTERN 02

The Role Archaeology Problem

Old team members, former roles, and past circle structures get imported alongside current data. Sera starts returning the wrong person for a leadership question.

Our fix: Current roles and people only in Phase 1. Archive former members separately.

PATTERN 03

The Decision Fossil

An old decision is imported without the newer decision that replaced it. Sera returns the outdated version as current organizational truth.

Our fix: Import only what is still in effect. Superseded decisions require context notes.

PATTERN 04

The Perfectionist Stall

The team tries to curate everything perfectly before importing anything. Implementation never starts. Momentum is lost.

Our fix: Time-boxed sessions. 20 strong records in week one, not zero perfect ones.

PATTERN 05 · THE MOST COMMON

The Unfacilitated Handoff

One person is handed the system and told to "get everything in." Without structure, guidance, or team support, that person makes inconsistent judgment calls alone. Sera ends up reflecting one person's partial understanding instead of the organization's shared memory.

Our fix: Assigned Memory Admin and Data Steward. Facilitated sessions. No one person alone with an undefined archive. We run weeks one and two with you.

YOUR IMPLEMENTATION ROADMAP

Five phases. Eight weeks. Then ongoing rhythm.

Implementation is not a migration. It is a memory-building practice. The phases below show how responsibility shifts from Saberra to your team over time, and what each phase is designed to accomplish.

- | | | |
|----------|--|---|
| 0 | Days 1-3
Saberra leads | <p>Readiness</p> <p>Memory Admin and Data Steward assigned. Technical setup confirmed. Notion databases live. Capture inbox active. 90-day source list identified. Import log created. First session scheduled. Your team does very little here. We prepare the infrastructure.</p> |
| 1 | Week 1
Saberra facilitates | <p>Trust Seed</p> <p>Your first 20-40 high-quality records. Saberra runs triage. Your team participates and learns the filter. Current roles, current circles, 5-10 active decisions, 5-10 open tasks, 3-5 active risks. At the end of this week, Sera should be able to answer simple real questions accurately. This is the trust moment. Everything depends on it.</p> |
| 2 | Weeks 2-4
You lead, we backstop | <p>Current Operating Memory</p> <p>Expand to 75-150 reviewed records. Your team takes the triage lead. Saberra joins to review what was imported and provide feedback. Last 90 days of high-value meetings, active projects, current policy records, active risks, key client or partner commitments. Facilitator training happens here. Your team begins using Sera for real operational questions.</p> |
| 3 | Weeks 4-8
You own it | <p>Controlled Historical Backfill</p> <p>Foundational content older than 90 days enters carefully: founding documents, active operating agreements, long-term governance records, major project histories still needed for continuity. Every historical item requires a note: "Historical, still current as of [date]." Sera gains depth without becoming noisy.</p> |
| + | Ongoing Monthly rhythm | <p>Memory Hygiene</p> <p>Bi-weekly review sessions through week 12. Then monthly memory hygiene sessions and quarterly audits. The Memory Review Queue stays below 30. Stale records are archived. Role and circle accuracy reviewed. Sera ceases to be a project and becomes part of how the organization operates.</p> |

Session format: 60-90 minutes. Always time-boxed. Never open-ended. Opening triage (20 min), import (30-40 min), review of what Sera extracted (15 min), close with what we import next and who owns the review queue until next session.

YOUR TEAM'S ROLES

Four roles. Multiple roles can be held by the same person.

Institutional memory should not reflect one person's partial understanding. These roles distribute the responsibility and make the quality visible. You do not need four separate people. Most small teams run with two.

MEMORY ADMIN

Core role

Owens the memory system on your side. The person Sera's trust runs through.

- Monitors the Memory Review Queue daily
- Approves, edits, or discards extracted records
- Keeps the review queue below 30 items
- Escalates sensitive or unclear records
- Raises support issues to Saberra
- Coordinates with the Data Steward

DATA STEWARD

Quality role

Owens input quality. The gatekeeper before anything reaches Sera.

- Decides what should be submitted to Sera
- Applies the 3-question check before every import
- Prevents archive dumps
- Approves selective import lists before sessions
- Maintains the import log
- Flags stale or uncertain content

FACILITATOR

Meeting role

Owens meeting-level routing. The person who closes each meeting with a decision about Sera.

- Asks the routing question at meeting close
- Ensures decisions and tasks are made explicit
- Tags or flags sensitive items before routing
- Confirms next actions and owners
- Sends the meeting to the capture inbox when appropriate

Closing script: "Did this meeting contain decisions, tasks, risks, role changes, or context future people will need? If yes, this goes to Sera."

TEAM MEMBER

Your whole team

The rest of the team has a simple job. You do not need to manage the system.

- Send useful, current information when asked
- Avoid forwarding old archives or random files
- Ask clear, specific questions
- Flag wrong answers to the Memory Admin
- Help keep the memory clean by not adding noise

Sera becomes trustworthy when everyone feeds her real, current, reviewed information.

The Memory Auditor is an additional role activated quarterly. Once per quarter, a named person (not the same as the Data Steward) samples 20-30 random records for accuracy, currency, and source quality, and reports findings to the Memory Admin or governing circle. This role protects long-term trust. Your implementation lead will guide you through the first audit.

THE SUBMISSION STANDARD

Three questions. Every piece of content. Every time.

Before anything goes to Sera, the Data Steward asks three questions. All three must be yes. One no means pause and review.

1

Did I review this? A person should be willing to say: I read this and I believe it is worth sending.

2

Is it still true, active, or useful today? Not historically interesting. Actually relevant now.

3

Did I choose this deliberately? Not because it was in a folder. Because it has a reason to become memory.

A fourth question ties all three together: "What future question would this help Sera answer?" If there is no clear answer, do not import it yet.

What belongs in Sera

SEND TO SERA

- Meeting notes with decisions or action items
- Current role descriptions and circle updates
- Active tasks with named owners
- Open or recently resolved risks
- Approved policies still in effect
- Active projects and commitments
- Client or partner context that must persist
- Governance decisions the team may need later
- Founding agreements that are still current
- Context future team members will need

DO NOT SEND

- Your entire ChatGPT history
- Old archives and random folders
- Outdated meeting notes with no active items
- Decisions that were later changed or reversed
- Abandoned project plans and scratch notes
- Duplicate documents
- Unresolved interpersonal or sensitive threads
- "Just in case" material you have not reviewed
- Former role assignments without current context
- Raw Google Drive or Notion exports

The meeting routing check: At the end of each meeting, the Facilitator asks: "Did this meeting contain decisions, tasks, risks, role changes, policy changes, approvals, or context future people will need?" If yes, route it. If no, let it go. Not every meeting belongs in Sera. Most check-ins and social calls do not.

GETTING THE MOST FROM SERA

Specific questions get specific answers.

Sera searches reviewed organizational memory. Her answers are only as strong as the records she has been given and the specificity of the question she is asked. Teach your team the difference between questions that work and questions that do not.

STRONG QUESTIONS

- What did we decide about [topic]?
- Who owns [role / task / project]?
- What tasks are open for [person or circle]?
- What risks are active around [topic]?
- What changed in [project] this month?
- What policies apply to [situation]?
- What meetings discussed [topic]?
- What decisions are still pending review?
- What canon changes were proposed recently?

WEAK QUESTIONS

- What should we do?
- What is the truth about X?
- Tell me everything.
- What happened with that thing?
- Who is the best person for this?
- What is everyone thinking?
- What did we talk about?
- Give me a summary of everything.

Strong questions name at least one of: topic, timeframe, person, circle, project, decision, policy, role, or risk.

WHEN SERA GETS SOMETHING WRONG

Do not panic. Do not blame the system. Inspect the source.

If Sera returns an inaccurate answer, the cause is almost always one of these. Wrong answers are usually a process signal, not a product failure.

- 1 **The source was outdated.** An old decision or role was imported and the newer version was not. Correct the record in Notion and add the current version.
- 2 **The content was imported without enough review.** The MRQ item was approved too quickly. Archive the record and correct the source.
- 3 **A decision changed but the update was not sent to Sera.** The newer decision needs to be added, with a note that it supersedes the prior one.
- 4 **The record is still waiting for human review.** It has not been approved yet. The Memory Admin needs to review and approve it.

Always tell the Memory Admin or Data Steward when you receive a wrong answer. The correction goes to the source record in Notion, not to Sera directly. This is by design. Human review is the trust gate. Correcting the record corrects the answer.

WHAT SUCCESS LOOKS LIKE

Four checkpoints. Twelve weeks to operating rhythm.

These are the milestones your implementation lead will verify with you. They mark the shift from implementation to operational trust.

WEEK 1 Trust Seed Complete

- Memory Admin and Data Steward assigned
- First session completed
- 20-40 high-quality records created and reviewed
- Memory Review Queue cleared
- Sera answers first real organizational question correctly

WEEK 4 Current Memory Active

- 75-150 reviewed records in Sera
- Current roles and circles represented accurately
- Active tasks, risks, and key decisions searchable
- Facilitators know the routing standard
- Memory Review Queue below 30 items
- Team using Sera for real operational questions

WEEK 8 Historical Backfill Controlled

- Foundational historical content added with current-status notes
- Stale records corrected or archived
- Memory hygiene session scheduled
- Review rhythm operating without Saberra facilitation
- No record backlog from unreviewed imports

WEEK 12 Operational Rhythm Established

- Sera integrated into governance and meeting rhythm
- Memory Admin and Data Steward confident
- MRQ healthy and maintained independently
- First quarterly audit scheduled
- Implementation closes. Operating support begins.

"The quality of Sera's memory depends on the quality of what your team chooses to give her, and the care taken in reviewing what she extracts."

Start with the last 90 days. Choose current records. Review before import. Approve before canon. Keep the queue clean. Audit quarterly.

Let Sera become the living memory of what is actually true now.

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