

KitForma.

PRACTICAL FIELD GUIDE

Documents That Keep Work Moving

A practical system for internal briefs, handovers, meetings, actions and versions

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SAMPLE EDITION

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How to use this guide

Small teams, independent operators and new coordinators who need colleagues to understand and continue ordinary internal work.

An original KitForma workbook for building a small, understandable document library. Includes a fictional workshop project, reusable TXT/CSV/HTML examples, a complete capstone and an answer key covering decisions, ownership and document changes.

- Write an internal brief with a bounded outcome and observable acceptance checks.
- Prepare a handover that a colleague can use without guessing the next step.
- Separate meeting discussion, decisions and assigned actions.
- Maintain a document register and version history with one clear current location.

Scope and limitations

- This book covers ordinary internal coordination, not contracts, tax, regulated advice or formal compliance records.
- All organizations, people, dates and project details in examples are fictional.
- The suggested conventions are adaptable working choices, not universal standards.
- No provider configuration, external sharing or security certification is included.

Published by KitForma. Edition 1.0. Sources checked 1 October 2026. People and businesses in worked examples are fictional. This is an independent publication, not endorsed by the platforms mentioned.

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Choose the work, then choose the document

A document should help someone make a decision, do a task or continue work after you leave. Start with that use rather than a blank template. An internal brief defines an intended outcome. A handover explains the current state and next steps. Meeting notes preserve decisions and actions. A register helps people locate the current material. These purposes can overlap, but confusing them creates avoidable work. A long meeting transcript is not automatically a useful handover, and a folder full of files is not automatically a document library. Each needs a clear reader and a practical completion test.

This workbook follows the fictional Birch Studio team as it prepares a small internal workshop. Mira coordinates the work, Eren prepares the room plan and Lea checks the participant instructions. Their task is deliberately ordinary: produce a room checklist, a facilitator sheet and clear participant instructions. They are not drafting a contract, handling tax records or giving professional advice. No real participant information is used. This bounded scenario lets you practice document decisions without needing an actual client project or copying a previous employer's files. The same method can later be adapted to an appropriate internal task.

Write a document purpose in the form “After reading this, the reader can...” For the brief, the reader can confirm the scope and decide whether the planned output meets it. For the handover, the reader can identify what is ready, what is blocked and what to do next. A purpose that says only “provide information” is too broad to guide editing. Name the reader's next action. Then list what the document does not decide. This prevents a

simple internal note from being mistaken for approval, a policy change or permission to spend money.

Begin with four files: a brief, an action list, a handover and a document register. Add meeting notes only when a meeting produces decisions worth preserving. More files are not evidence of a better system. A small team may keep several sections in one document, provided their purposes and current states remain clear. Before adding a new template, ask which recurring confusion it will prevent and who will maintain it. If nobody can answer, improve the existing document instead. The aim is less guessing during work, not a larger collection of forms to complete.

Name the next action

For an internal workshop brief, handover and action list, write one sentence beginning 'After reading this, the reader can...'. Identify one decision that each document must not imply.

Sources and tools

[S1] **GitLab Handbook - All-Remote Meetings**

<https://handbook.gitlab.com/handbook/company/culture/all-remote/meetings/>

Checked: 2026-10-01

[S2] **W3C Web Accessibility Initiative - Headings**

<https://www.w3.org/WAI/tutorials/page-structure/headings/>

Checked: 2026-10-01

CSV structure validator

Optional: inspect quoting, column counts and header structure in the fictional action and document registers. It does not validate ownership, decisions or completion.

<https://kitforma.com/en/csv-validator/>

Inside the complete guide

Write a brief that can be accepted or corrected

Give every document an identity and a home

Prepare a handover that survives your absence

Use meetings to resolve a defined question

Make actions observable and owned

Control revisions without freezing the work

Build templates that remain readable and safe to reuse

Capstone: repair a workshop packet under change

Answer key and a small maintenance cycle