Knowledge Base Audit & Governance Cheat Sheet

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Purpose

The purpose of this document is to help you with the first steps of auditing your knowledge base (KB). We'll ask the right questions to help guide three things:

1. What your ***knowledge architecture*** looks like
2. What your knowledge base ***Governance Playbook*** should include
3. How to ensure ***continued success***

We also want to help you create an initial list of documents/processes that are essential to maintaining your knowledge base:

- **Knowledge Base Architecture**
    - How are your cards/articles grouped together?
    - Who is assigned to oversee each collection/board?
- **Governance Guidelines**
    - Roles, Permissions, and Responsibilities
        - What roles, permissions, and responsibilities do users have?
    - Creation and Editing Process
        - How do you create new knowledge?
        - Which templates should be used?
        - Who can verify?
        - What should the verification cadence be?
- **Master User List**
    - A spreadsheet of all your users by team to help you prevent over-admission to your KB
- **New User Add Request Workflow**
    - Process for adding a new user to KB
- **"How to Get Access to your KB" Article** (External Facing)
- **"How to Submit Content to your KB" Article** (External Facing)

Watch What Do You Know? The Value of a Knowledge Audit for a fuller understanding of this process

Knowledge Base Architecture

Rebuilding your knowledge base is a challenge! Each team might have its own architecture and different way of contributing information.

Don't forget what your main goals are:

1. An architecture that ***makes sense for your maintenance*** as a knowledge administrator
2. An architecture that has ***flexibility to grow*** with your company
3. An architecture that is ***consistent across each team collection*** so that each of your assigned Collection/knowledge group owners have ***consistent governance guidelines***

Questions and Actions to Ask to Get Started:

1. **What teams are using this knowledge base?**
    - Are there sub-teams that need to have their own groups of knowledge that are internal to those teams?
2. **How much of the knowledge between these teams are shared?**
    - Is there product information that everyone needs to know?

      Ex: Escalation processes that are shared cross-functionally?
3. **Review the tags/knowledge categories of your current knowledge base and group them**
    - Rather than taking a look at titles (which may be inconsistent), find common denominators. This should help you see category trends. Next, group these trends to consolidate.

Asking these questions should then help you create the following guidelines and document them:

- Knowledge Architecture and Hierarchy
    - *Guru ex: Collection → Board Group → Boards → Sections → Cards*
- Tag groups

Governance Playbook

Content

Purpose of your Governance Playbook

Roles, Permissions, and Responsibilities

- Knowledge Base Administrator (direct contact with your Knowledge Base CSM)
- Collection Administrators (for organizations with multiple teams)
- Verifiers (card editors and updaters)
- Viewers/General Users
- Process for Offboarding/Reassigning Roles

Rules of Engagement (ROE)

- Creating and Editing Knowledge Categories (Boards)
- Creating and Editing Articles (Cards)
    - What is the process?
    - How to assign verifiers
    - How to assign tags
- Verifying Articles (Cards)
- Questions and Escalations

Accessibility and External Communications

- New User Creation Request Process
- User/Seat Pricing Guidelines
    - Helpful for different teams that have multiple cost centers using the same knowledge base
- Company-wide accessible article/wiki/etc. that includes the information above and primary contacts for each team.

Ensuring Continued Success

Identifying *Key Stakeholders*

It's important to know which teams rely on the knowledge you've prepared and those who are ultimately going to finance the tool.

Stakeholders may include:

- Users
- Co-governing Directly Responsible Individuals (DRIs)
- Team Managers (to help reinforce usage of your KB)
- Department Heads (to continuously fund and assign official role responsibility

Getting *Buy-in* for Officialized Responsibility

Make sure your knowledge base isn't a "side project". Many organizations have a dedicated role that only focuses on updating and maintaining their knowledge base. However, not all organizations have grown enough to support this need.

At the very least, each organization must have the following responsibilities included in a formal role to keep it from falling to the wayside:

Knowledge Base Administrator:

(example functions)

- The prime contact for the system both internally and with the system's Customer Success Manager/Account Manager
- Manage yearly contract and pricing negotiations
- Be the thought leader and maintainer of the Governance Playbook
- Identify team (or Collection) co-governors and facilitate consistent governance meetings and cross-team communication
- Manage oversight of user count and organization
- Administer quality control and guidelines (e.g. templates, tag library, etc.

Consistent Communication to Users

As a Knowledge Base Administrator, communication is key between all your audiences. Here are some examples of different topics that you would communicate to different audiences:

Co-Governors

- Quarterly KB Review
- New Processes
- Updated Pricing and Contract Agreements
- New Collection Leads
- Knowledge Base Resources

Users and Leads

- Workflow and Content Quality Surveys (bi-annual)
- New KB Features
- New Teams joining the KB
- Best practices for search and usage of KB
- New User Onboarding guidelines
- Changes in role permissioning