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Your Step-by-Step Guide to Performing a Knowledge Audit

For many organizations, finding company knowledge feels like a scavenger hunt: you may be able to find one piece of information at a time (if you look hard enough), but you never have a complete view of everything at once.

To truly understand the state of your team's or company's knowledge, you need a comprehensive map — something that shows a complete picture of how you store, share, and manage knowledge.

A knowledge audit can help you build that map. By auditing the information that exists within your company, you'll gain an all-inclusive view of the knowledge your company has (or lacks), as well as how that information moves between people and systems. And you can use that map to improve your company's knowledge sharing processes and implement strategies to equip your team members to work most effectively.

Use the steps below to complete a comprehensive knowledge audit for your team, department, or entire organization:

Step #1: Clarify Your Goals

Before you begin a knowledge audit, you should understand your specific goals for the project and what you hope to accomplish. If you aren't going to do anything with the results of your audit, why spend the time and resources conducting it? Potential goals may include:

- Developing an effective knowledge sharing strategy
- Identifying wants and needs for a knowledge sharing platform
- Determining where you need to focus knowledge/documentation development efforts

With those goals in mind, you'll have a better idea of the information you need to collect during the audit, including:

- Your team or organization's knowledge needs
- How resources are managed and stored
- Gaps in team or company knowledge and obstacles to knowledge sharing
- How company information is shared throughout the organization or across your team

Step #2: Prepare Your Audit Team

While you will have a core team overseeing the knowledge audit, insight from a variety of stakeholders can help you develop a more accurate picture of your organization's knowledge. If you're conducting a company-wide knowledge audit, make sure to include representatives from any teams that contribute to and share company knowledge (which should be every team). If you're conducting a knowledge audit within your department or team, assemble a group of 3-4 team members to help you with the next step of the process.

Step #3: Inventory Existing Knowledge

One of the most critical — and time-consuming — tasks of the knowledge audit is creating an inventory of what information exists within your organization. When preparing for this step, it's critical to consider all types of information: **explicit, implicit, and tacit**.

Knowledge Types

Explicit: Knowledge that is easy to articulate, document, and share. Examples: process documents, the company handbook, and white papers.

Implicit: The application of explicit knowledge. Examples: Learning how to transfer a customer service call or how to make a sales presentation.

Tacit: Knowledge gained from personal experience that is hard to document. Example: Understanding the right tone and inflection to use when speaking to a dissatisfied customer on the phone.

Identifying the explicit knowledge within your organization will be much more straightforward than identifying the implicit and tacit knowledge — but all types are critical to a complete audit. So, you'll need to use a few different strategies to understand the breadth of information you have, including:

Intranet or wiki analysis.

The most logical place to start is your company intranet or wiki, where companies generally store the majority of their documentation. This will typically be the best source for identifying the explicit knowledge that exists in your organization. You should create a thorough inventory of what exists here, including process documents, marketing and sales assets, training materials, company handbooks, and databases.

Internal department documentation.

Examine your individual department's internal processes for creating and sharing documentation. Teams may have shared drives, shared cloud storage, or even files saved locally on their computers. So, leveraging the audit team you put together, review the inventory you collected from the intranet and add any additional materials that are housed elsewhere.

Questionnaires and surveys.

Beyond searching for files and documentation, you'll also need to involve people from across the organization — this is where you'll discover more about your company or team's implicit and tacit knowledge. Questionnaires and surveys can help you determine what knowledge exists in your employees' heads and how they apply it. In this step, you'll identify employees' skill sets and specialized knowledge, including how confident they are in those skills.

Step #4: Examine the Flow of Knowledge

Beyond identifying what knowledge exists within your organization's people and systems, you need to know how that information is transferred between those people and systems. Consider the following questions:

How is information primarily accessed?

In the previous step, you identified where company or department knowledge lives — but your employees may not access it from that source. Sure, maybe they do go to the company intranet to find accurate internal information. Or, they may have an original (and possibly outdated) version of a process document saved on their desktop for easy access. Or, maybe they search their email archive each time they need a certain file that they once received as an attachment.

How is information shared between employees?

When a new employee asks a senior employee for company information, how is it delivered? Employees may share knowledge via Slack, emails, casual conversations, or even physical versions of documents. This is where key challenges can arise around duplication, outdated content, and inaccurate information, so it's critical that you understand employees' methods.

Who shares it?

When you speak to team members about their use and sharing of company information, make sure you consider a broad cross section of employees. Speaking only with managers, for example, won't give you insight into how entry-level employees share knowledge. You have to dig into different levels of your company's hierarchy and different departments to truly understand who is sharing knowledge.

Step #5: Identify Obstacles and Knowledge Gaps

As you complete your inventory, you will start to see gaps emerge. Are you lacking particular training documents? Are you unsure if the PDF you're looking at is the "final" version of the latest white paper? Should there be a thorough process document explaining how to handle potential customers' objections during the sales process?

Beyond those obvious gaps, you should also pinpoint opportunities to make your company's knowledge sharing process easier, more streamlined, and overall, more effective. Consider:

Are there duplication issues?

Too often, one department doesn't talk to another, and you end up with multiple versions of the same document on one company intranet — with no clarification on which version employees should use. Your company should have a process to avoid this.

Do too many things exist in too many different places?

When employees don't have one established place to keep documentation and knowledge, they save it in multiple places — in emails, on their desktops, in physical files in their desks — which makes it nearly impossible for any other employee to find that same information.

Did You Know?

According to McKinsey Global Institute (MGI) research, the average employee spends nearly 20% of the workweek looking for internal information or trying to find a colleague who can help with a specific task.

Does a process/document exist that people don’t know about?

Maybe the executive team provided the right documentation (or process to create that documentation), but no one knows about it — and so, they don’t use it. For knowledge sharing to be effective, everyone in the company has to be on the same page.

Are there people who hold knowledge that isn’t available to anyone else?

Too often, employees store invaluable information solely in their brains. And that means if they quit tomorrow, they would take that knowledge with them — and you would have no way to get it back. An effective knowledge sharing solution should allow for a way to capture and preserve that tacit knowledge for all future employees to use.

Once you have a better understanding of the health of your company’s knowledge, you can identify appropriate next steps, whether that’s establishing more effective processes or investing in a knowledge sharing solution.

Bloomfire is the leader in knowledge engagement, delivering an experience that connects teams and individuals with the information they need to do their jobs. Our cloud-based knowledge engagement platform gives people one centralized, searchable place to engage with shared knowledge and grow their organization’s collective intelligence. For more information or to schedule a demo, visit **www.bloomfire.com**.