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The Official Knowledge Engagement Platform Buying Checklist

Businesses today face many challenges related to accessing, sharing, and leveraging information across the organization. Teams often manage dynamic information and insights across different systems and siloed groups. Valuable information often sits in individual employees' minds, hindering teams' ability to be productive and preventing individuals from contributing to their organization's collective intelligence. As organizations continue to adopt new ways of working, having the tools and technology to centralize knowledge is critical.

A knowledge engagement platform is a centralized hub for collecting, connecting, and democratizing knowledge generated across individuals, teams, and organizations. These platforms turn knowledge into a renewable resource for teams, ensuring they can tap into the richest possible knowledge to make informed decisions and drive results.

Finding the right technology solution for managing and sharing information with ease requires careful consideration. We've developed the following checklist to help organizations understand the core capabilities needed in a robust knowledge engagement platform and identify a platform to drive knowledge engagement success.

Your Checklist:

1. Core Knowledge Management Capabilities
2. Collaboration and Engagement
3. Automation and Personalization
4. Usability
5. Integrations with Other Applications
6. Software Built to Scale
7. Compliance, Security, and Governance
8. Strategic Implementation Partner
9. On-Going Support and Strategy Consultancy

1. Core Knowledge Management Capabilities

Knowledge is your organization's biggest strategic advantage. And when it comes to finding a knowledge engagement platform, your motto should not be "one size fits all." A platform needs to handle both the needs of the individuals managing the platform (your owners and admins) and your day-to-day users. Look for a platform that incorporates core knowledge management capabilities such as:

☐ A best-in-class search experience—including smart search and multiple ways to find content with customizable filters.

☐ The ability to access knowledge regardless of where or how your teams work—including mobile access and customizable alerts and notifications.

☐ The ability to easily migrate your existing information and insights into a new system or gives users the option to create unique content within the platform.

☐ Content verification so all users know what content is the most up-to-date and community owners have insight into what information needs to be updated.

☐ Support for multiple media files and types—including secondary sources and videos.

☐ Seamless setup and implementation so that IT team involvement is not required.

☐ Comprehensive reporting and analytics that allow for critical data points to be pulled directly from the platform vs. requiring involvement from a data team.

2. Collaboration and Continuous Engagement

Collaboration and the ability to drive continuous engagement across the organization are critical differentiating factors between a traditional knowledge management platform and a knowledge engagement platform. Knowledge is dynamic and always evolving, so look for a platform that promotes and supports these differentiators and makes it easy to:

☐ Capture feedback and crowdsource information from subject matter experts.

☐ Start discussion threads and create a database of FAQs allowing your subject matter experts (SMEs) to spend less time answering repetitive questions.

☐ Empower users with social aspects such as gamification, liking, commenting on, or sharing information.

☐ Collaboratively create and enrich knowledge across teams and the organization.

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3. Personalization and Automation

Everyone in the organization can't be expected to search and view information in the same way, which is why it's essential to find a knowledge engagement platform that offers personalization and elements of automation for end-users. A powerful knowledge engagement platform will offer:

☐   Personalized feeds so users can customize and individualize the way they find knowledge to do their best work.

☐   Deep indexing capabilities so that every word of every resource—even video and audio files—is immediately searchable and findable.

☐   Related and recommended content discovery based on skills, interests, or prior interactions with the platform or the ability for users to follow SMEs, tags, keywords, and more to ensure they are always getting the most relevant information.

☐   Automated tagging to help optimize your content so the people who need it can find it quickly.

4. Usability

When engaging users across different teams, departments, and organizations, a simple and intuitive user experience ensures knowledge engagement will be broadly adopted and leveraged. Considerations for usability should include:

☐   A familiar and intuitive user interface, including features and functions that resemble users' everyday apps.

☐   An interface that is simple and easy to use to help motivate users to contribute and add knowledge for their peers to consume and leverage.

5. Integrations with Other Applications

Organizations will see greater adoption—and heightened utility—with a new knowledge engagement platform when teams can access information and insights seamlessly between workplace applications. The best-of-breed knowledge engagement platforms offer:

☐   The out-of-the-box ability to integrate with common applications and platforms teams use every day, including file sharing and storage, real-time communication and chat, productivity software, and CRM systems.

☐   An open API for new or custom integrations based on organizational needs.

6. Software Built to Scale

Whether needed for 50 or 10,000+ users, any chosen platform must scale as your business and needs grow. It might make sense for one functional team to use the platform initially, but the platform should be dynamic enough to support expanded use across teams, departments, or an entire organization. Look for a platform that:

☐ Easily allows you to add more users as your team or business grows.

☐ Provides a predictable pricing structure so you can accurately budget for any future growth.

☐ Is transparent about licensing and doesn't include hidden fees.

☐ Is customizable for the team or departments using the platform—including customizing the appearance to include your company logo and brand colors, giving your community a unique name, determining how many filters users can search against, and providing quick links to areas outside your community.

☐ Offers role-based permissions and explicitly states the varying degrees of access for each of the roles.

7. Compliance, Security, and Governance

Data privacy, risk management, and cyber-security are always top of mind when searching for new technology, especially for organizations in regulated industries. The most secure platforms will go above and beyond to make sure critical information is safe and secure. For heightened security and compliance, seek a platform that:

☐ Enables Single Sign-On (SSO) using Security Assertion Mark-Up Language (SAML 2.0) to navigate through systems without managing multiple passwords.

☐ Offers backup and recovery of data by replicating information across multiple Available Zones (AZs) in real-time and taking snapshots of data and storing them apart from servers throughout the day.

☐ Restricts application access using whitelisted IP addresses.

☐ Encrypts data at rest and user data in transit to ensure that all login data is protected.

☐ Secures all connections via SSL/TLS and supports backup in multiple locations.

It's also important to plan for including the proper teams that oversee aspects of compliance, security, and governance, including Information Security, Legal, and Procurement, in the buying committee process. The point at which these teams participate may vary, but they will each have specific roles and responsibilities:

☐ The Information Security department (InfoSec) handles an organization's security questionnaires and RFI/RFPs.

☐ The Legal department focuses on knowing what legal reviews need to happen. Some questions that might come up during a legal review include: Who within the organization is accessing knowledge? What data is your vendor accessing?

☐ The Procurement department is involved in the policy and governance around the platform's licenses and terms. Procurement can be a lengthy process, so ensuring this team gets involved as soon as possible can avoid unnecessary delays or timeline extensions for technology adoption.

8. Strategic Implementation Partner

The successful launch of a knowledge engagement platform is highly dependent on the implementation provided by the technology vendor. It's essential to find a partner and a vendor that offers success services once the contract is signed. The right partner should have an implementation team of knowledge engagement professionals who understand specific organizational needs and goals and can deliver a tailored onboarding and implementation experience. Look for a partner that:

☐ Provides a dedicated implementation consultant and has a proven implementation methodology.

☐ Understands the rules of engagement and content governance requirements for your organization—including the types of content added to the platform, who has access, and ownership.

☐ Offers change management strategies and tactics to help make the transition as seamless and painless as possible.

☐ Delivers a positive experience that matches your company expectations and is aligned with your long-term vision.

9. On-Going Support and Strategy Consultancy

Many knowledge engagement platforms provide basic support and stop there. Much like a strategic implementation partner, a suitable vendor should also offer top-notch support once implementation is complete and provide consultancy services to help your organization reach your knowledge engagement goals. Look for a partner that:

☐ Provides a dedicated Customer Support team for continuous account planning and advocacy and offers consultative services around best practices and usage optimization at no extra charge.

☐ Delivers ongoing support along with on-site support as needed.

☐ Provides access to training materials and a community where users can network and learn from peers.

☐ Is transparent when it comes to system availability and recovery terms.

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.**

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