



# The Ultimate Knowledge Engagement Workbook

Your Guide to Developing an Actionable Strategy



**2023 Guide**

# Why Your Organization Needs a Knowledge Engagement Strategy

A vast trove of knowledge exists across your organization. This includes many different types and sources of knowledge, including corporate intellectual property, institutional knowledge such as process and policy documents, and the individual intellect that each employee brings to their role. This collective intelligence is critical to both day- to-day operations and innovation—but its full value cannot be realized if employees lack easy ways to share, access, collaborate across, and leverage your company's knowledge. That's where a knowledge engagement strategy comes in.

## Knowledge engagement

is the practice of proactively harnessing and building upon a core set of knowledge, empowering teams to tap into a collective source of intellect so that the value and utility of knowledge constantly grows.

## A knowledge engagement strategy

is the planned and documented approach an organization takes to centralizing knowledge and turning it into a renewable resource.

### Implementing

a knowledge engagement platform like Bloomfire can be an essential part of a knowledge engagement strategy, but your strategy should also factor in the change management required to drive knowledge engagement behaviors, as well as a plan for measuring and reporting on your success.

This workbook is designed to help you and your team think critically about your knowledge engagement needs, set goals, and successfully democratize knowledge across your organization.

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# 1. Identify Your Knowledge Engagement Needs

Before you can build your knowledge engagement strategy and implement the right technology to support it, you need to identify the challenges you are trying to resolve. While every organization is unique, there are some common knowledge engagement needs and challenges that many companies experience. Below you'll find some examples of frequent knowledge engagement challenges.

- Knowledge lives in many different locations and is difficult to find.
- Employees waste time trying to track down the knowledge they need to do their jobs.
- Individuals who possess specialized knowledge dedicate significant time to fielding requests for information and answering repetitive questions.
- Departments and teams become siloed, leading to misalignment of goals and missed collaboration opportunities.
- Employees or teams duplicate work because they don't know what already exists within the organization
- Employees access and use out-of-date information without realizing it is inaccurate.
- Knowledge is lost when employees leave the company or move to a new role.
- Employees feel disengaged with their work and peers, increasing the risk of turnover.
- The customer experience feels disjointed across different channels, negatively impacting customer satisfaction and loyalty.
- Business decisions are made without evaluating existing data and insights.

# List Your Organization's Knowledge Engagement Needs

Use the previous examples and your own experiences to create a list of your organization's knowledge engagement needs. Start by identifying a challenge and thinking about how you can reframe it as a need. For example:

## **Challenge**

Knowledge lives in many different locations and is difficult to find



## **Need**

We need one central, searchable location for all documented company knowledge.

We recommend gathering a group of internal stakeholders to help build a list that is representative of the needs that exist across your organization.

Challenges	Need

# Getting Additional Feedback on Knowledge Engagement Needs

## [Sample Survey]

Interviewing department leaders and other internal stakeholders is a great place to start when building your list of knowledge engagement needs, but you can also get valuable insights by surveying your staff.

Below are some sample survey questions you can use to better understand how your company's current approach to knowledge management is working and what pain points exist.

How confident are you that you can find the information you need to do your job?

*(5 meaning completely confident and 1 meaning not confident).*

How confident are you that the information you find is current and accurate?

*(5 meaning completely confident and 1 meaning not confident).*

In an average workday, how much time do you spend looking for the information you need?

- A. < 30 minutes
- B. 30 minutes – 1 hour
- C. 1 - 2 hours
- D. > 2 hours

In an average workday, how much time do you spend answering repetitive questions or helping others look for information they need to perform their duties?

- A. < 30 minutes
- B. 30 minutes – 1 hour
- C. 1 - 2 hours
- D. > 2 hours

Where are you most likely to look for the information you need?

For example: coworkers, emails, intranet, knowledge base, internal messaging system (Slack, MS Teams, Google Chat)

How accurate are the following 3 statements?

*(5 meaning completely accurate and 1 meaning not at all accurate).*

“If I find outdated content, I know what steps to take to either notify the right people or update the content myself.”

“I am confident that if someone on my team were to take an unexpected leave of absence, their responsibilities would be well documented, and their files would be available to whomever needs them.”

“There are tools and documentation I use to do my work that no one else can access.”

Which statement(s) best describe our company's culture regarding knowledge engagement?

- A. Work is siloed, and very little information is shared.
- B. People share knowledge and others take credit.
- C. There is no clear path/process for sharing knowledge.
- D. Knowledge is shared initially but isn't maintained.
- E. Our leaders share knowledge and reward those who share.

## 2. Define Your Goals and Objectives

Once you know the challenges your organization is attempting to solve, it's time to set your knowledge engagement goals and objectives.

**Goals** represent your desired outcomes and can be defined by the following basic characteristics:

- They emerge from what you know about your organization.
- They are more specific than your corporate vision statement.
- They are different from objectives in that they are not connected to a timeline

As you think about goals, it's a good idea to consider how they will tie back to broader business impact areas such as revenue, retention, and innovation.

For example, a knowledge engagement **goal** that impacts revenue might be:

*To reduce wasted spend on duplicative work by ensuring all departments and teams can access company-wide knowledge and insights.*

**Objectives** are concrete, actionable steps that your organization will take to meet your goals.

They have the following characteristics:

- They have measurable, precise timetables for action.
- They state who will do what and when.
- They can be assigned to specific staff members or departments.
- They can be crossed off when finished.
- An example of an objective that supports the goal above might be:

An example of an **objective** that supports the goal above might be:

*The knowledge management team will launch a pilot program with a knowledge engagement platform in six months.*

As you start setting objectives, make sure you're tying them to the SMART outline:

**Specific** – Be clear about what needs to be done. Everyone involved should understand the initiative and what they can do to help make it successful.

**Measurable** – Establish key performance indicators (KPIs) important to your organization to gauge success. For example, reducing the average amount of time employees spend looking for information each week, or achieving a defined rate of participation in a knowledge engagement platform, may be outcomes important to your company.

**Attainable** – Are there sufficient resources, staff hours, and budgetary allotments available to achieve your goals and objectives? Be sure to accurately estimate the amount of staff resources required to achieve your stated goals.

**Relevant** – Do the objectives support the goals and do the goals support your organization's mission?

**Time bound** – When should the objectives be completed or measured?

# Set Goals and SMART Objectives

Use this space to document your organization's high-level goals and the objectives and KPIs you will tie to them.

Goal	Objective	KPI

# 3. Map Existing Knowledge and Gaps

Making institutional and employee knowledge central and searchable is often a core goal in a knowledge engagement strategy. This may seem like a daunting project, especially if knowledge is currently spread out across different platforms, hard drives, filing cabinets, and the minds of individuals. But, as the saying goes, “the only way to eat an elephant is one bite at a time.” Centralizing your knowledge becomes a lot more manageable when you break it into smaller activities and start by mapping out the knowledge that already exists across your organization.

Mapping out company knowledge is something you can do even before finalizing the platform you will use to centralize information. In fact, the earlier you start mapping your knowledge, the more prepared you will be when you do implement a new platform, and the faster you will be able to roll out your solution to the rest of the organization.

So where do you begin? Start by identifying all the different sources where knowledge currently lives. These may include:

*A company intranet or wiki*

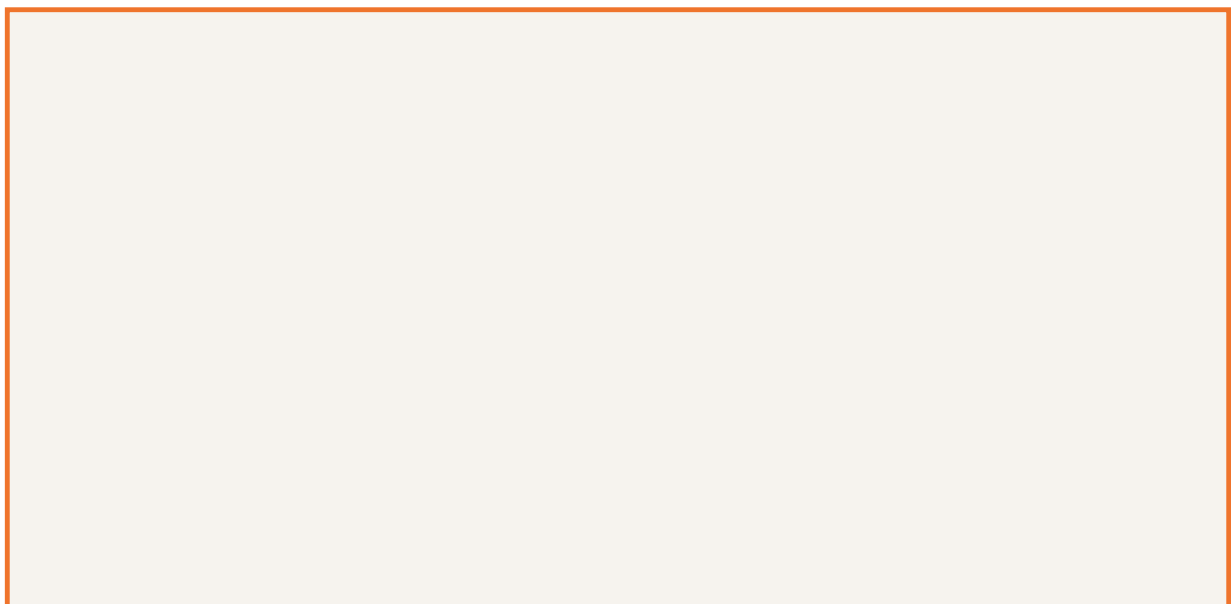
*Shared drives*

*Collaboration and knowledge management platforms used by different departments or teams*

*A real-time chat platform, like Slack or Microsoft Teams*

*The minds of subject matter experts*

## List the Locations Where Your Company Stores Knowledge





## Complete Your Knowledge Inventory

After you've identified the sources where knowledge lives within your organization, it's time to inventory that knowledge. One way to do this is to create a spreadsheet with columns for the following:

Asset Name	Knowledge Type	File type(s)	Location(s)	Date published or updated	Current?
	Determine how you will categorize different types of knowledge, e.g. process document, subject matter expertise				yes/no

As you begin your inventory, one type of knowledge that may be difficult to capture is the tacit knowledge that lives in the minds of your subject matter experts. Questionnaires and surveys can help you determine what knowledge exists in employees' heads and how they employ it. Consider surveying employees from across the organization to identify their specialized knowledge and skill sets, including how confident they are in those skills.

## 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. Ask yourself the following questions:

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.

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—so they don't use it. For knowledge engagement 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 engagement strategy 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, such as repackaging existing knowledge for better consumption and creating a prioritized list of knowledge gaps to fill.

Mapping your company's knowledge and identifying current gaps at this stage will set you up to hit the ground running when your organization implements a platform to centralize knowledge.

# 4. Establish Your Steering Committee

As you prepare to make any major change around knowledge engagement—whether you are implementing new technology, designing new processes, promoting behavioral changes, or all of the above—you should establish a steering committee to help guide the project.

A steering committee is a group of stakeholders who will meet regularly to provide strategic direction on a project, ensure that project is aligned with company goals, and monitor the execution of the project. Their goal should be to support the project manager and see the project through to a successful conclusion.

A good steering committee can be a valuable resource for a project manager. The steering committee can help determine what needs to be done—and what additional resources may be needed—to make the project successful, identify and address potential challenges along the way, and introduce new perspectives about other business or external factors that need to be taken into account.

Establishing a steering committee can also help your team get early buy in for your knowledge engagement strategy. When a team of high-level stakeholders is involved with the project from the beginning, they will be more likely to feel invested in its outcome and to evangelize the knowledge engagement strategy across their departments.

## Who Should Be On Your Steering Committee?

Your steering committee should represent your key stakeholders and should ideally be made up of senior leaders from various areas of the organization (especially areas that will be directly impacted by your knowledge engagement strategy, such as Customer Experience or Market Research). Depending on the size and structure of your organization, it may also be beneficial to include representation from your budgeting, compliance, and resource allocation functions. Finally, it can be valuable to include an end user (that is, someone whose day-to-day work will be directly impacted by your knowledge engagement strategy) to serve as the voice of your internal customer.

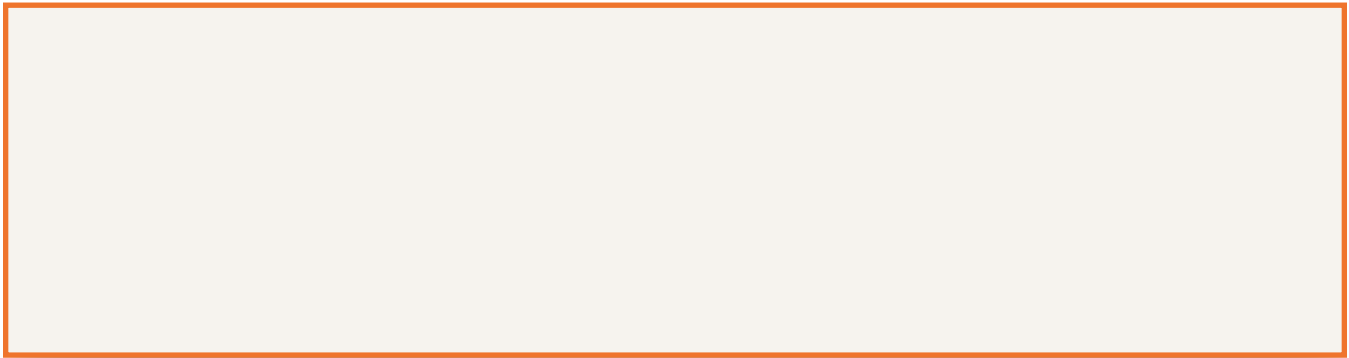


## Identify Your Steering Committee

Think about the areas of the business that will be impacted by your knowledge engagement strategy and who can best represent those areas on your steering committee. Make sure everyone you are considering for your steering committee:

- Has an interest in making the project a success
- Is willing to be on the steering committee and can commit the necessary time
- Has the authority to make decisions on behalf of the function they represent

Now list the 6-7 stakeholders you believe will be the best fit for your steering committee.



## When Should Your Steering Committee Meet?

Your steering committee should meet, at minimum, once per project phase. For example, if your project involves implementing a knowledge engagement platform, your steering committee might meet:

- At the project kickoff to help establish budget and scope
- After the project management team has developed a shortlist of solutions, to help provide guidance
- Ahead of the implementation of a new knowledge engagement platform
- After the implementation, for project closure

Additional meetings may be scheduled to address timely issues as needed.

## What Should Your Steering Committee Meetings Cover?

In general, steering committee meetings should cover the following topics:

**Project status:** The project manager should provide a high-level overview of where the project is on the timeline.

**Outstanding action items:** What action items were set since the last meeting? What has been completed and what still needs to be done?

**Budget:** Is the project still within its budget? Are there additional costs that were not originally accounted for?

**Major issues:** What issues, if any, are currently blocking the project from moving ahead?

**Next steps:** Identify new action items and who is responsible for them.

# Implementation

## Before

Get Baseline measurements for your success metrics



## After

Create a culture of knowledge engagement



## Long Term

Develop a curation strategy



## 5. Set Your Knowledge Engagement Strategy Up for Success

You want your knowledge engagement strategy to be successful and impactful for the long term. So what steps can you take before, during, and after the implementation of your strategy to maximize your success?

### Before Implementation: Get Baseline Measurements for Your Success Metrics

At this point, you should have established goals and the key performance indicators you will use to measure the success of your new strategy. But to truly understand the strategy's impact, it's important to get baseline measurements of your KPIs before the implementation of your strategy. That way, you will be able to measure change over time and demonstrate the success of the strategy to your C-suite using concrete metrics. If you used the knowledge engagement survey in Section 1 of this workbook, you already have some baseline metrics you can use to help tell the story of knowledge engagement at your organization before implementing your new strategy. Just make sure to have your staff complete the same survey after you have launched the strategy (we recommend sending a survey six months post-launch) to measure the change.

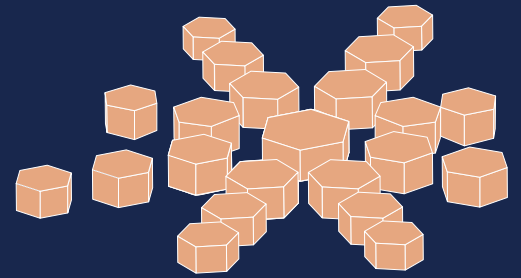
## After Implementation: Create a Culture of Knowledge Engagement

Use the checklist below for inspiration as you strategize around creating a culture of knowledge engagement. Check off the strategies you have already implemented and think about which other ones you want to try.

### Checklist: Strategies to Encourage Knowledge Engagement

- Define and document how you will use different communication channels (e.g. email for one-to-one asynchronous communication, chat for real-time conversations, knowledge engagement platform for finalized information that should be widely shared).
- Block off time for team members to contribute content to your knowledge engagement platform.
- Organize cross-functional team-building events with employees from different teams.
- Schedule weekly or monthly brainstorming sessions. Add your notes from these sessions to your knowledge engagement platform.
- Provide a shoutout (in an email, comment, or company meeting) when someone contributes an especially valuable piece of content to your knowledge engagement platform.
- Give a small bonus to the employee who contributes the most highly-used piece of content for the quarter.
- Use gamification and give small rewards for achieving different milestones, such as contributing 10 pieces of content to the company knowledge engagement platform.
- Host a quarterly scavenger hunt in your knowledge engagement platform, giving prizes to employees who find specific pieces of information in the platform during a set period.
- Assign new hires a mentor who can encourage them to contribute to your culture of knowledge engagement.
- Seek out the opinions of new hires so that they become comfortable contributing their ideas.
- Have subject matter experts record short videos where they share best practices or walk through a process.
- Encourage employees to do a short write-up after completing a project and post it in your knowledge engagement platform.
- Have an executive champion share a weekly update through a short post or video in your knowledge sharing platform.
- Tag knowledge engagement platform users in questions or posts when you think they have something valuable to contribute.
- Add comments or ask questions about the content your team members have shared in your knowledge engagement platform.
- Encourage coworkers to post questions to your knowledge engagement platform rather than emailing or messaging you directly when the answer will benefit others.
- Send a weekly email newsletter with the latest updates from your knowledge engagement platform.

# Long Term: Develop a Curation Strategy



If you want to ensure that your company's collective intelligence becomes a sustainable resource, it's important to have a curation strategy. This will help your organization maintain its knowledge base over time, ensure information is up to date and accurate, and eliminate outdated or duplicate information.

Here are some best practices to incorporate into your curation strategy:

1

Create guidelines for sharing knowledge. While you do not want to make it prohibitively difficult for employees to contribute their knowledge, you can set some basic guidelines to make knowledge easier for everyone to find and use. For example, you might set guidelines around the formatting of titles, the categories users should assign their knowledge to, or when contributors should review and update their contributions. In some cases, you may also want to create templates to make it easier for contributors to share certain types of knowledge.

2

Create a service level agreement for answering questions. If you are using a knowledge engagement platform with a Q&A component, consider setting an internal service level agreement that asks subject matter experts to respond to questions within a set period. This will help ensure questions are answered in a timely manner and employees continue posting questions to the knowledge engagement platform, rather than individually reaching out to SMEs.

3

Schedule regular maintenance reviews. By scheduling regular reviews of your company's existing knowledge, you can keep maintenance tasks manageable and make sure it's as easy as possible for employees to access up-to-date knowledge. If you are using a platform like Bloomfire, you can automate maintenance activities like setting expiration dates when knowledge contributions need to be reviewed or unpublished.

4

Lean on your analytics. You should be tracking engagement metrics around knowledge contributions (if you use Bloomfire, these metrics are built into the platform). These metrics can help you understand what information is being viewed and interacted with the most and the least, which can give you valuable insights to optimize your company's knowledge and the way it is shared.

# 6. Measure the Success of Your Knowledge Engagement Strategy

Once you have implemented your knowledge engagement strategy, it's essential to measure its impact. This will allow you to communicate its value to senior leadership so that your organization will continue to invest in the strategy's success.

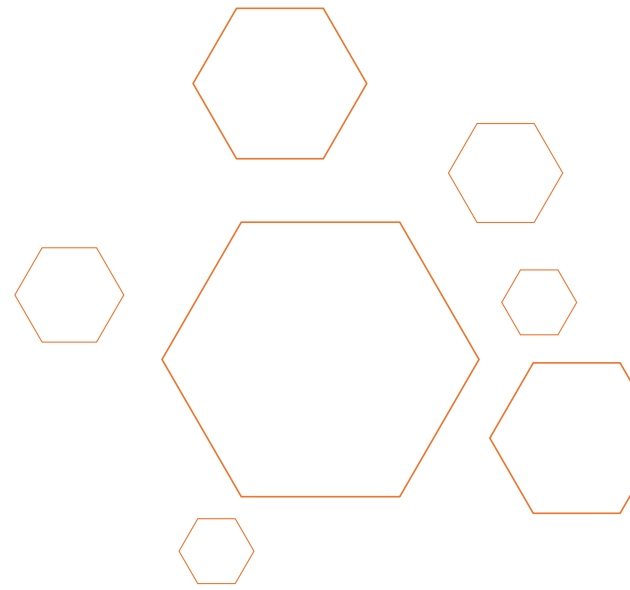
## What Metrics Should You Track and Share?

The metrics you track will depend on the specific goals and KPIs you have set for your knowledge engagement strategy. For additional guidance, we have provided a list of commonly tracked metrics below:

- **Employee satisfaction:** This can be tracked using the knowledge engagement survey you send out before and after implementing your strategy. Asking employees to respond to a statement such as "I am confident that I can always find the information I need to do my job well" on a 1 to 5 scale can help you measure change in employee satisfaction as it relates to knowledge engagement.
- **Time savings:** Your survey can also help you measure time savings by asking employees to estimate how much time they spend searching for information every day or week. Depending on your specific goals, you may also be able to measure time savings in different ways. For example, if you manage a contact center and one of your goals is to help agents resolve customer issues faster, you can track any changes in the average time to resolution.
- **Daily and monthly active users:** If one of your goals involves getting employees to access and share knowledge through a central knowledge engagement platform, you should look at the percent of employees using that platform on a daily or monthly basis.
- **Percent of answered questions:** If your knowledge engagement strategy includes your SMEs answering questions in a centralized platform, it will be valuable to track the percent of answered questions to determine whether the Q&A base is being used as intended.
- **Percent of employees contributing knowledge:** Do you have a goal around capturing knowledge from a wider swath of employees? Track the percentage of employees sharing contributions in your knowledge engagement platform at regular intervals.
- **Total contributions created:** One easy way to demonstrate that your organization is growing its collective intelligence is to look at the total contributions shared in your knowledge engagement platform over a defined period, such as the last month, quarter, or year.



# How to Make an Impact When Presenting Your Results



When you are given the opportunity to share the results of your knowledge engagement strategy to senior leadership, use the best practices below to make your presentation impactful and memorable.

- **Understand the needs of your audience:** Do your research and make sure you understand your audience's goals, priorities, and results for which they are accountable. Tailor your presentation to your audience and make it clear how the knowledge engagement strategy benefits them and their department .
- **Be concise:** Senior leaders are constantly pressed for time, and there's a good chance your presentation will be crammed between other important meetings that may go long and cut into your set time. Be prepared to share a condensed version of your presentation, and make sure that you summarize the most important information at the beginning of the presentation.
- **Frame your presentation around the big idea:** Communication expert Nancy Duarte recommends filtering your entire presentation through the lens of your big idea: in this case, the biggest impact of your knowledge engagement strategy. Rather than getting too deep in the weeds with results that may matter to staff but are less meaningful to senior leaders, focus on a business area like revenue, retention, growth, or innovation that your strategy has improved. Any results you share should support this big idea.
- **Be flexible and prepare to answer questions:** Know that your audience won't necessarily wait for a designated Q&A session at the end of your presentation. Be prepared to field questions throughout your presentation, elaborate on the current and future context of the knowledge engagement strategy, and explore the possible consequences of any next steps you recommend
- **Make calls to action clear:** If there are any next steps you want your audience to take after your presentation, spell them out. For instance, if you have launched a pilot program with a knowledge engagement platform in one department and want to expand the platform across your organization, explain your recommendation, how it's beneficial to the organization, and what concrete actions are required.



# Use a Storytelling Framework to Share Your Successes

When presenting on your knowledge engagement successes, using a story format can be essential to holding your audience's attention and making your results memorable. According to Prezi's State of Attention Report, more than 80 percent of business professionals said they had shifted their attention away from the speaker in a recent presentation, while 90 percent said a strong narrative behind a presentation is critical in holding their attention

Use the framework below to start thinking about how to share your results as a compelling story:

## **Setting:**

This is what establishes context. Your setting should capture the moment in time before your company implemented a knowledge engagement strategy. Explain the status quo for knowledge management at this point in time.

## **Characters:**

Your characters are the people affected by the situation you established in your setting. These may include employees who relied on the existing approach to knowledge management in their day-to-day work and leaders responsible for driving productivity, customer satisfaction, innovation, and other areas impacted by internal knowledge management.

## **Conflict:**

The conflict should reveal the pain points the characters experienced as a result of the knowledge management status quo. For example, a pain point for leaders might be lost productivity or poor customer experiences as a result of company knowledge being difficult to access.

## **Resolution:**

Your resolution should introduce your knowledge engagement strategy and reveal how it has helped your characters overcome the conflict. This is a good opportunity to incorporate success metrics and employee testimonials into your story.

# Knowledge Engagement Strategies In Action

We hope that this workbook will help you plan and implement a knowledge engagement strategy that drives meaningful impact for your company. To provide additional inspiration, we are sharing examples of three Bloomfire customers who have increased the value of their organizations' collective intelligence through knowledge engagement.

## Orvis: Elevating the Customer Experience Through Knowledge Engagement

# ORVIS®

### The Organization:

The Orvis Company is an outdoor and sporting goods retail company that has been in business since 1856. While Orvis started as a fly-fishing equipment provider, they have expanded their offerings to include men's and women's sportswear, dog products, hunting gear, luggage, and more.

### **The Challenge:**

Outstanding customer service is a core value and priority for Orvis, and their contact center employees are responsible for delivering an experience that delights customers. To provide this amazing experience, Orvis' customer service employees must have easy access to the tools and knowledge necessary to help their customers.

Before 2018, Orvis was using SharePoint to store customer service knowledge and documentation, and associates often struggled to find the information they needed while assisting customers. To complicate matters, many associates were also storing information in physical binders, making it difficult to keep that information consistent and presenting a risk of knowledge loss when tenured employees left the company.

**“It all ties into customer experience for us.”**

**Jason Pafford**

Instructional Designer &  
Communications Specialist

### **The Solution:**

Orvis embarked on a digital transformation project to centralize all customer service knowledge and product documentation and chose Bloomfire as the knowledge engagement platform to support their transformation. To make sure their end users bought into the new platform, Orvis involved a group of customer service associates in beta testing ahead of the launch. Their end users also helped shape the category structure for their Bloomfire community. By getting input from their users (and taking advantage of Bloomfire's flexible category structure), Orvis was able to create categories and sub-categories that are intuitive for users to navigate.

### **The Results:**

Since launching Bloomfire, Orvis has seen their first call resolution rates double, indicating that the platform and new knowledge engagement strategy have enabled customer service associates to find the information they need to resolve customer issues on the first call. This has helped customer service associates work more efficiently and has improved the overall customer experience. “It all ties into customer experience for us,” says Jason Pafford, Instructional Designer and Communications Specialist. “By having Bloomfire, we've elevated that yet another notch. And we look forward to continuing to use Bloomfire to take it up to the next notch.”



# Capital One: Breaking Down Knowledge Silos Between Lines of Business

## The Challenge:

In 2016, Capital One recognized that their customer insights teams were experiencing silo issues due to geography, their reporting structure, and their technology. Each insights team was using a different third-party or in-house system for sharing their research, or were sharing information in one-off emails. As a result, the teams were missing opportunities to build on one another's data and research, and research was typically reactive rather than proactive.

## The Solution:

Capital One's insights leaders agreed that they needed a strategy to become more influential across the business. The first step of this transformation was choosing a software solution for sharing information across lines of business. They ultimately chose Bloomfire due in part to the platform's robust search engine and customizable structure, which would allow it to scale with the business. "We know we're an organization that changes all the time, and we needed a platform that would let us change easily," says Coleen Akers, Insights Product Manager. Akers and her fellow stakeholders wanted to make it as easy as possible for their team members to search and navigate Bloomfire so that there wouldn't be any barriers to using the tool. When thinking about how to structure the platform, they took their cues from The Oregon Experiment, an approach that the University of Oregon used to design pathways on their campus. The idea behind this approach was to allow people to move around the campus before building paved paths, and then adding paths after seeing which routes people naturally want to take. For Capital One, this meant keeping their content categories within Bloomfire intentionally broad until they saw what types of content people were sharing, and how they were searching for each others' content.



**"Bloomfire is changing how people go about their work."**

**Coleen Akers**  
Insights Product Manager

## The Results:

Capital One's current approach to knowledge engagement gives insights team members and stakeholders a central, searchable place to store and share research, allowing everyone to be more self-sufficient. "Bloomfire is changing how people go about their work," says Akers. "Rather than talking to 10 people to learn something new, [insights team members] have one place to go." Philip Rhodes, Director of Research Design, adds that the Bloomfire community helps insights teams make better use of existing research and build on what their peers have done rather than starting from scratch. "If you go search within Bloomfire, you can get some evidence to say, 'Oh, we already know these things. We don't have to do primary research.' We can use the research we already have to go deeper on these topics." This helps Capital One get more value from existing research, save money by avoiding duplicative research projects, and increase innovation by making it easier to synthesize insights across multiple sources and studies.



## The Organization:

Capital One is one of the most well-known financial institutions in the U.S., the U.K., and Canada. As a diversified bank, they offer a broad array of financial products and services to both businesses and consumers.

# Insperity: Centralizing Knowledge and Fueling Collaboration



## The Organization:

Insperity is an HR management organization that helps small- and mid-sized businesses streamline their HR operations, manage costs, and minimize risks.

## The Challenge:

With more than 3,900 employees spread out around the country, Insperity needed a way for dispersed team members to efficiently share information. Because the company handles sensitive data, they also needed a platform that would store their information securely. And, with policies and procedures changing quickly, they ultimately needed a system that would allow team members to update and approve content quickly. Insperity knew they needed a knowledge engagement strategy that would allow them to be nimble, updating information in real time and ensuring there was no duplication of efforts across different departments.

## The Solution:

Insperity initially began their knowledge engagement transformation in their sales department by launching a pilot program with Bloomfire. They rolled out their first Bloomfire community with the goal of giving sales team members across the U.S. one place to collaborate, ask questions of their peers, and find all the resources they needed to be successful. After seeing high and continuously growing engagement levels with their first community, Sales Coach, Insperity realized that they could benefit from expanding Bloomfire, with a new community for the service department and another for the entire company to access knowledge.



**“Let’s put it out on Bloomfire”**

**Lisa Jasper**  
Director of Performance and Improvement

## The Results:

By expanding Bloomfire across all departments, Insperity has reduced the risk of duplicate work, kept departments aligned, and allowed employees to leverage the knowledge and expertise of their peers, regardless of their role or location. Bloomfire has become the go-to source for company knowledge and insights, with more than 280,000 contribution views per quarter across the organization. Lisa Jasper, Director of Performance Improvement, credits Bloomfire with breaking down silos between departments and giving team members a space where they feel comfortable collaborating. “It’s been wonderful to say, ‘Everyone in the company needs to know this. Let’s put it out on Bloomfire,’” she says.

Interested in learning more about implementing Bloomfire as part of your knowledge engagement strategy?

Schedule a demo: [bloomfire.com/demo-bloomfire](https://bloomfire.com/demo-bloomfire)

