

A PRACTICAL KM TOOLKIT

KNOWLEDGE MAPPING & PLAYBOOK

A practical framework to map, assess, prioritize and activate organizational knowledge

DEFINE • DISCOVER • MAP • ASSESS • ACT • IMPROVE

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BEFORE YOU BEGIN

Foreword

Most organizations today don't have a problem that knowledge does not exist — they have a problem to connect knowledge with people at the right time. The expertise, procedures, templates and lessons learned that make good work possible already exist. What's missing is a clear picture of where that knowledge lives, who depends on it, and where are the gaps.

A knowledge map builds that picture. A playbook turns the picture into actionable insights. Each phase in this playbook includes the questions to ask, the artifacts to produce, and the decisions to make. Work through it once for a pilot domain, then make it a habit.

WHY THIS PLAYBOOK EXISTS

01 Purpose

A knowledge map makes the organization's knowledge ecosystem visible: what knowledge exists, where it lives, who owns it, who needs it, how it flows, and where gaps or risks exist. The playbook converts those findings into practical action.

THE TEN-STEP PATH

02 The Knowledge Mapping Journey

Every knowledge mapping effort follows the same arc, whether it covers one team or an entire enterprise.

- 01 DEFINE →
- 02 DISCOVER →
- 03 MAP →
- 04 ASSESS →
- 05 IDENTIFY GAPS →
- 06 PRIORITIZE →
- 07 ACT →
- 08 ENABLE →
- 09 MEASURE →
- 10 IMPROVE

START WITH THE BUSINESS PROBLEM

03 Phase 1 — Define

Start with the business problem, not the repository. A knowledge map anchored to a real objective gets funded and used.

- Define the business objective and scope.
- Identify functions, processes, geographies or knowledge domains in scope.
- Define success measures upfront.
- Identify executive sponsor and core stakeholders.

Typical objectives

Reduce turnaround time, accelerate onboarding, improve customer support, reduce knowledge loss, increase reuse, support transformation.

GO FIND THE KNOWLEDGE, WHEREVER IT LIVES

04 Phase 2 — Discover

Discovery is fieldwork. The goal is a realistic picture of how knowledge actually moves today — not how the org chart says it should.

- Interview business leaders, SMEs and knowledge consumers.
- Walk through critical business processes.
- Inventory repositories and collaboration channels.
- Review search analytics, usage data and support queries where available.
- Identify tacit knowledge held by individuals or communities.

PUT THE KNOWLEDGE ECOSYSTEM ON ONE PAGE

05 Phase 3 — Map

Turn discovery findings into a structured map — the reference artifact everything else in this playbook builds on.

Knowledge Domain	Knowledge Asset	Owner	Consumer	Repository	Process	Critical.
Proposal Management	Proposal templates	Presales SME	Bid teams	SharePoint	RFP response	High
Customer Support	Troubleshooting guides	Support SME	Agents	Knowledge Base	Incident resolution	High
Onboarding	New-hire guide	KM/HR	New employees	Intranet	Onboarding	Medium

SCORE WHAT YOU FOUND

06 Phase 4 — Assess

Assess each critical knowledge area on a 1–5 scale so priorities are based on evidence, not opinion.

Assessment	Guiding Question
Business Criticality	What happens if this knowledge is unavailable?
Quality	Is it accurate and reliable?
Currency	Is it current and regularly reviewed?
Findability	Can users locate it quickly?
Accessibility	Can intended users access it?
Reusability	Can it be applied across teams/use cases?
Knowledge Risk	Is it dependent on a small number of people or fragile systems?

Example Knowledge Health Score = Quality + Currency + Findability + Accessibility + Reusability. Use this as a prioritization aid, not an absolute measure.

NAME THE GAP TO KNOW THE FIX

07 Phase 5 — Identify Gaps

Not every gap needs the same response. Naming the gap type points directly to the right action.

Gap Type	What It Means	Typical Action
Missing	Critical knowledge does not exist	CREATE
Tacit	Knowledge exists mainly with people	CAPTURE
Inaccessible	Knowledge exists but users cannot easily reach it	CONNECT
Outdated / Duplicated	Content is stale or repeated	CURATE / CONSOLIDATE
Underused	Useful knowledge exists but is not being reused	ENABLE / SOCIALIZE

NOT EVERYTHING GETS FIXED AT ONCE

o8 Phase 6 — Prioritize

Weigh each gap on three factors so effort goes where it matters most.

- Business Value — How strongly does closing the gap support business outcomes?
- Risk — What is the consequence of leaving the gap unresolved?
- Effort — How much time, technology, SME capacity and change effort are required?

THE KNOWLEDGE PLAYBOOK ITSELF

o9 Phase 7 — Act

This is the playbook's core: a direct line from finding to action, with a concrete example each time.

Finding	Playbook Action	Example
Critical knowledge sits with one SME	Capture & document	Expert interview, how-to, decision guide
Same content exists in several places	Consolidate	Create authoritative source and retire duplicates
Content is outdated	Review & refresh	Assign owner and review cycle
Users cannot find content	Improve findability	Taxonomy, metadata, search, navigation
Knowledge exists only tacitly	Harvest	Communities, interviews, lessons learned
Teams reinvent solutions	Create reusable assets	Templates, playbooks, FAQs, examples
Knowledge is not reaching users	Socialize & enable	Communities, newsletters, training, workflow prompts
Important knowledge does not exist	Create	New SOP, guide, article, learning asset
AI cannot reliably use the content	Make AI-ready	Governance, metadata, structure, ownership, freshness

MEET PEOPLE WHERE THEY WORK

10 Phase 8 — Enable

Embed knowledge into the flow of work rather than expecting employees to visit a portal just to find information.

- Onboarding
- RFP / proposal workflows
- Customer support
- Project delivery
- Sales
- Training and communities
- Decision-making
- AI assistants and search

PROVE IT'S WORKING

11 Phase 9 — Measure

Measurement closes the loop — it tells you whether the map and the playbook are actually changing outcomes.

Dimension	Possible KPI	What It Tells You
Adoption	Active users / repeat users	Is knowledge being used?
Reuse	Reuse rate / asset reuse	Are teams leveraging existing knowledge?
Efficiency	Time-to-answer / time-to-create	Is work getting faster?
Quality	Error / rework rate	Is knowledge improving outcomes?
Business Impact	Productivity, CX, revenue or cost measures	Is KM creating business value?
Knowledge Resilience	Critical SME dependency / coverage	Can the organization withstand knowledge loss?

CLOSE THE LOOP AND GO AGAIN

12 Phase 10 — Improve

A knowledge map is a snapshot.. Improvement is what keeps it true.

- Review measurement results against the objectives set in Phase 1.
- Retire actions that underperformed; double down on what worked.
- Update the map where ownership, repositories or processes have changed.
- Re-run Assess and Prioritize on a fixed cadence (e.g. quarterly or after major change).
- Feed lessons learned back into governance standards.

ONE PAGE, WHOLE ECOSYSTEM

13 Knowledge Mapping Canvas

Use this canvas to capture a single knowledge domain at a glance — in a workshop, an interview, or a review.

Field	Notes / Findings
Business Objective	
Critical Knowledge Domains	
Key Knowledge Owners / SMEs	
Knowledge Consumers	
Repositories / Sources	
Critical Processes	
Top Knowledge Gaps / Risks	
Priority Actions & Owners	

TEN QUESTIONS THAT SURFACE TACIT KNOWLEDGE

14 SME Interview Guide

Use these as a starting script for Discover-phase interviews; adapt the order to the conversation.

- What knowledge is most critical to your team's success?
- What do new or less-experienced employees struggle to find or understand?
- Where is this knowledge currently stored?
- Who are the key people others go to for answers?
- What knowledge is difficult to document?
- Where do people frequently reinvent work?
- Which content is duplicated, outdated or hard to trust?
- What knowledge would create the greatest business impact if made easier to access?
- What knowledge would be at risk if a key person left?
- What should an AI assistant or knowledge search experience be able to answer?

MAKE IT DURABLE, NOT A ONE-TIME EXERCISE

15 Knowledge Governance Checklist

Governance is what keeps the map accurate and the playbook relevant after the initial project ends.

- Every critical knowledge domain has a named owner.
- Authoritative sources are clearly identified.
- Review frequency is defined according to content criticality.
- Retirement / archival rules are defined.
- Taxonomy and metadata standards are documented.
- Access permissions are appropriate.
- AI-facing content has clear ownership, currency and trust signals.
- Usage and business-impact metrics are reviewed regularly.

WHY ALL OF THIS MATTERS

16 Core Principle

The objective is not to create more content; it is to help people make better decisions, solve problems faster, reuse organizational knowledge, and reduce knowledge-loss risk.

THE WHOLE PLAYBOOK IN ONE LINE

17 One-Page Operating Model

KNOWLEDGE → **MAP** → **GAP** → **PRIORITIZE** → **CURATE** → **CONNECT** → **ENABLE** →
MEASURE → **IMPROVE**

Use this playbook as a repeatable cycle. Revisit the map when business processes, technology, organizational structures or strategic priorities change.