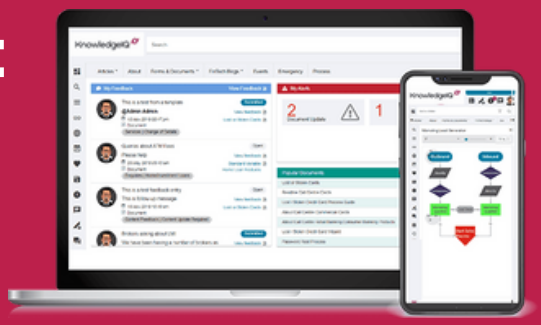
Knowledge management system checklist

Use this checklist to assess every knowledge management system (KMS) on your shortlist. KnowledgeIQ, by Knosys, recommends these nine areas, each with a question to ask every vendor.



KnowledgeIQ KMS

1. Search that understands how agents ask questions

- ◯ Ranks results by relevance to each team or role ✓
- ◯ Corrects spelling and recognises synonyms and partial matches ✓
- ◯ Lets administrators pin priority articles to the top of results ✓

> **Ask the vendor:** *How does search handle misspellings, synonyms and partial matches?*

2. Guidance built for live interactions

- ◯ Templates that present knowledge in a consistent format ✓
- ◯ Decision trees and step-by-step wizards for complex or regulated tasks ✓

> **Ask the vendor:** *Can our authors build step-by-step guidance without technical help?*

3. Governance that keeps knowledge trustworthy

- ◯ Automated version control with side-by-side version comparison ✓
- ◯ Custom approval workflows and role-based permissions ✓
- ◯ Scheduled review dates and enforced content expiry ✓

> **Ask the vendor:** *What stops an outdated article from staying live?*

4. Alerts that reach the right people

- ◯ Notifications you can target by team, location or individual ✓
- ◯ Tracking of who has opened and acknowledged each alert ✓

> **Ask the vendor:** *Can you show which agents have read a critical update?*

Knowledge management system checklist (continued)

	KnowledgeIQ KMS

5. A feedback loop from the front line

- ◯ Agents can flag missing or incorrect information directly against an article ✓
- ◯ A feedback workflow with owners, priorities and due dates ✓

> **Ask the vendor:** *How does frontline feedback reach the content owner, and how do authors track it?*

6. Reporting that connects knowledge to performance

- ◯ Usage and engagement reporting by team, location and business unit ✓
- ◯ Insight into peak demand periods and engagement with alerts ✓

> **Ask the vendor:** *Can we analyse engagement across teams, locations and business units?*

7. Integrations that keep agents in one place

- ◯ Connects with your CRM and contact centre platform ✓
- ◯ Open API and single sign-on with your identity provider ✓
- ◯ Shares the same knowledge with customer self-service channels ✓

> **Ask the vendor:** *Will the KMS work inside the tools our agents already use?*

8. Security, reliability and a long-term partner

- ◯ Strong security controls backed by recognised certification, such as ISO/IEC 27001 ✓
- ◯ Handles growing users, content and concurrent searches without slowing down ✓
- ◯ Implementation support and training for administrators, authors and end users ✓

> **Ask the vendor:** *What does support look like after go-live, and where is your support team based?*

9. An experience agents will adopt

- ◯ An intuitive interface that every user can navigate, regardless of technical skill ✓
- ◯ Works across desktop and mobile devices ✓
- ◯ Customisable features, workflows and dashboards ✓

> **Ask the vendor:** *Can we test the system with real agent queries during the trial?*

See how KnowledgeIQ performs against each point.
Book a no-obligation demo at **knoiq.co/contact**

KnowledgeIQ