



Document your knowledge base's setup

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This step is one we wish every customer did--and many seem to skip right over it. (Don't feel bad if this is you--we only began doing this in 2022!)

As you're configuring your knowledge base or once you're done getting it set up, **document those decisions**.

Why do we suggest doing this? There's a bunch of reasons, but the big ones are:

1. **Hand-off or training:** if you need to hand over ownership of the knowledge base, or you need to train a new team member, you have a clear list of which features are being used and how they've been set up. You'll have a doc for that. 😊 (And alternatively: if you leave your current position or team, you can take some information about what you've done in the past with you to your new gig!)
2. **Clear line of responsibility:** some features do require the assistance of someone in your IT department (or you might have reached out to our support owls for help). If something goes wrong or you have questions about changing those features in the future, you'll know who to talk to.
3. **Future evaluations:** we know that the fates sometimes take customers away from us. Maybe your company gets bought and the purchasing company wants you to use a different knowledge base, or you're being pressured to use a product suite that includes some kind of knowledge base software. Knowing which features you've set up and how they're used can make that transition easier (or help you make the case for sticking with KnowledgeOwl 😊).
4. **Docs or it didn't happen:** by working in KnowledgeOwl, you're acquiring a new domain of knowledge for yourself and your company. We'd be negligent if we didn't encourage you to document and share that knowledge.

The template

We encourage you to structure this information in whatever way makes sense for you. Ultimately, the question we want the documentation to answer is:

What would I need to know if someone just dumped this knowledge base in my lap and I knew nothing about it?

This can be a challenging set of documentation to create. But if you review it once a year or so, it can help you keep a handle on how your use of KnowledgeOwl is changing over time, help you remove outdated integrations,

and keep your docs in a row.

We've provided a text template for you to start with as a Google spreadsheet. You're welcome to create a copy of this to use for your own purposes:

https://docs.google.com/spreadsheets/d/1uAYj_E31mF5MCYmPq1sn2801JcPm38sJqQ1Ee7OS86U/edit?usp=sharing
