



MOVING YOUR
**STANDARD
OPERATING
PROCEDURES**
— TO AN —
ONLINE
KNOWLEDGE BASE

Benefits and **Challenges**

IS IT TIME TO **MAKE THE MOVE?**

Documented Standard Operating Procedures (SOPs) are the key to running an efficient and effective business. Without clearly established procedures, it is nearly impossible to:

- **Add new team members**
- **Ensure consistent results from your actions**
- **Reduce errors**

If you are reading this then you probably already realize this.

You may have many of your SOPs already documented in Word or PDF files. Different businesses store these different ways, but it usually falls into one of these categories:

- **The SOPs are printed out and stored in a binder**
- **The SOPs are stored as Word or PDF files in a local, centralized file server**
- **The SOPs are stored as Word or PDF files in a cloud-based file sharing service such as SharePoint, Dropbox, or Google Drive**

So, if you have your SOP's documented, how can you tell if your business needs to move them to an online knowledge base?

Here are a couple of **checks** to perform.

1. When was the document **last used**?

Ask yourself, when was the last time someone actually opened this file? If it has been **more than 6-12 months** then that can be a good sign that you need to move to an online knowledge base.

An online knowledge base will make your procedures more useable and **discoverable**. It does no good to document something if nobody is using it.

2. Is the document **out of date**?

Documents that don't get used quickly become outdated because nobody notices that the information is **no longer accurate**. If your Word files are consistently out of date then it you could probably benefit from moving to an online knowledge base.

3. Are there **multiple outdated** versions in use?

Check with your team. Do many of them have outdated SOPs on their computers? Are they asking teammates to **send them the latest version**? If you have this problem it is definitely time to move to an online knowledge base.

4. Are you sure **which documents** are in use?

Word and PDF files will give you no insight into which SOPs are being followed and which are being ignored. It is very difficult to provide any sort of reporting around the usage of these files. Even worse, it is difficult to understand what information or SOPs **you are missing**.

If you don't have data you can't **adapt and improve**, so if you can't answer the questions, what SOPs are my people using and what answers are they searching for, then it is time to move to an online knowledge base.

BENEFITS OF MOVING TO AN ONLINE KNOWLEDGE BASE



I am guessing that at least one of the items above made you realize that you probably need to make the move to an online knowledge base. But let's look at some of the **benefits** as well:

- **Everyone always has the latest version**

No more asking someone to send you the latest file. With an online knowledge base everyone always has access to the **most current**, published information.

- **People will be able to find and follow your SOPs**

All online knowledge bases will have some sort of search functionality. Your team members will be able to find the procedures they need in one **centralized** location instead of searching across folders on your file share.

- **When an SOP is out of date you will hear about it**

Because your team members will access your SOPs more regularly they will also notice if anything is out of date. When an SOP is out of date you will hear about it and be able to **update it immediately**.

- **Reporting**

Most online knowledge bases will provide you with some sort of reporting about what content your team members are viewing. Some will even give you reports about what they are searching for. Search reports like this can help you **identify gaps** in your knowledge base which you can proactively address.

- **Better referencing**

Many SOPs will depend on other SOPs. With an online knowledge base you can easily link, or reference associated or dependent procedures. This **decreases the duplication** of information and ensures greater consistency across your organization.

CHALLENGES OF MOVING YOUR PROCEDURES TO THE CLOUD

Now that you have decided to move to an online knowledge base, what challenges can you expect?

● Organization

Knowledge bases are like gardens, if they aren't tended carefully they will quickly become a mess of weeds. You will want to come up with an organizational plan for your knowledge base. But you also need to realize that that plan will change over time. Be sure to choose a knowledge base that will allow you to **modify your organization strategy** without any major repercussions (broken links, etc.).

● Authentication

You are going to want to protect your online knowledge base. How will your users log in? Most online knowledge bases will allow you to create user accounts in their system. But having your users remember another username and password can be a barrier to usage.

It will be better if you can allow your users to sign in to your knowledge base using one of your existing systems. This is called **Single Sign-on**.

● Authoring and Viewing Permissions

Are there SOPs that only certain team members should see? Do you want everyone to be able to modify your SOPs or only certain people? You need to decide what **level of control** you need and consider that as you are selecting your online knowledge base.

SHOULD YOU IMPORT YOUR EXISTING WORD FILES OR **START FROM SCRATCH?**

Many organizations think they will just import their existing Word files. While this is often possible, it is not always the best idea.

One of your challenges will be deciding whether or not your should import your existing content, or start creating new content from scratch.

You will want to **evaluate** whether or not the existing Word files:

- **Have current and accurate information**
- **Are written in a way that will make them easily usable when viewed as a knowledge base article**

“With an online knowledge base everyone always has access to the **most current**, published information.”

BEST PRACTICES

Here are some **best practices** to consider as you move to an online knowledge base:

- **Be clear about your goals**

Make sure everyone has a clear idea of the business **outcomes** you are trying to achieve by moving to an online knowledge base. If you stay focused on the business goals then you will have an easier time **making decisions** about how to implement and use your online knowledge base.

- **Optimize your articles for answering questions**

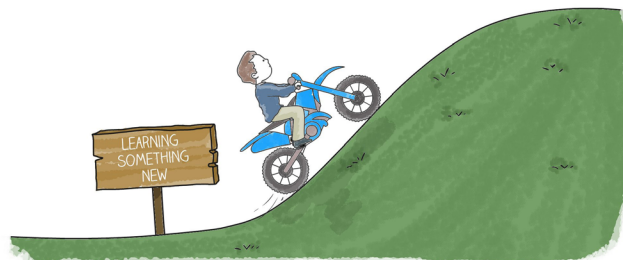
Realize that most of your team members will access your knowledge base when they have a question. One trick is to put the question you are trying to answer **in the title of the article**. This will make it easier to write the knowledge base article and easier for your team members to know when they have found the right answer.

- **When possible use Single Sign-on**

Reducing the friction of signing into your knowledge base will greatly **increase its usage**. Single Sign-on can go a long way towards reducing that friction.

- **Make your documentation visual**

Visuals will increase the **clarity and usability** of your knowledge base articles. Use screenshots, diagrams, etc. to clearly communicate a procedure.



NEXT STEPS

Hopefully this has been helpful in giving you information about the potential benefits and challenges of moving to an online knowledge base.

What are your **next steps**?

- **Identify the business outcomes you want to achieve by moving your knowledge base online.**
- **Perform a content audit to see how much you will be moving online — or start from scratch.**
- **Start evaluating vendors. Make sure that can support the business goals that you have set.**

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