THE KNOWLEDGE CAPTURE PLAYBOOK

A practical system for extracting, validating and preserving institutional knowledge

PIXELDUST

AI Knowledge Hub Consulting

Executive Summary

Organizations rarely lose knowledge all at once. It disappears gradually as experienced employees leave, procedures change without documentation, decisions remain buried in email, and teams rely on informal explanations instead of trusted sources.

This playbook provides a repeatable method for identifying high-value knowledge, extracting it from people and systems, converting it into useful knowledge assets, validating its accuracy, assigning ownership and preparing it for retrieval through search or AI assistants.

The objective is not to document everything. The objective is to capture the knowledge that prevents delay, reduces errors, supports continuity and enables people to make correct decisions without depending on a specific individual.

A successful capture program produces knowledge that is findable, understandable, current, permission-aware and owned by someone responsible for maintaining it.

What This Playbook Includes

- A prioritization method for deciding what to capture first
- Five capture methods and guidance on when to use each
- Interview scripts, workshop agendas and process-mapping prompts
- A knowledge asset template and evidence standard
- Validation, approval and ownership workflows
- A 30/60/90-day rollout plan and operating metrics

1. Define the Capture Objective

Knowledge capture fails when the project begins with a vague goal such as “document what everyone knows.” Start with an operational objective that can be tested.

Weak Objective	Strong Objective	Test of Completion
Document the sales process	Enable a new salesperson to qualify, price and hand off a standard opportunity	A trained employee can complete the process using the approved guidance
Capture HR knowledge	Answer the 50 most common employee policy questions with cited sources	Answers are approved by HR and permissions are tested
Preserve operations knowledge	Remove dependency on one operations manager for recurring exceptions	At least two other employees can resolve defined scenarios correctly

2. Prioritize Knowledge by Business Risk

Do not begin with the largest document repository. Begin with the knowledge whose absence would create the greatest operational harm.

Factor	1 - Low	3 - Moderate	5 - Critical	Questions
Operational impact	Minor inconvenience	Meaningful delay or rework	Work stops, customers affected or compliance risk	What happens if this knowledge is unavailable?
Key-person dependency	Several people know it	Two people know it	One person is the only reliable source	Who can perform or explain this correctly today?
Frequency	Rarely used	Monthly	Daily or weekly	How often is this knowledge needed?
Volatility	Stable for years	Changes periodically	Changes frequently or varies by scenario	How often must the answer be reviewed?
Transfer difficulty	Easy to explain	Requires examples	Requires judgment, exceptions or tacit experience	Can a new person learn it from existing material?

Priority score = Operational Impact + Key-Person Dependency + Frequency + Volatility + Transfer Difficulty. Capture items scoring 20-25 first, 14-19 second and below 14 only when strategically useful.

3. Recognize the Six Types of Knowledge

Procedural knowledge: How work is performed: steps, inputs, outputs, tools, handoffs and completion criteria.

Decision knowledge: How choices are made: thresholds, judgment factors, approval rules, tradeoffs and exceptions.

Relational knowledge: Who to contact, who owns a domain, which stakeholders matter and how escalation works.

Contextual knowledge: Why a process exists, what changed, which historical decisions shaped it and what must not be repeated.

Exception knowledge: What to do when the standard process fails, information is missing, a customer is unusual or risk increases.

Reference knowledge: Policies, contracts, specifications, definitions, pricing rules, calendars and other source material.

4. Select the Right Capture Method

Method	Best Used When	Core Activity
Document review	Use when knowledge is already	Inventory files, identify

	written but scattered, duplicated or untrusted.	authoritative versions, compare conflicts and record owners.
Structured interview	Use when expertise is concentrated in one person or includes judgment.	Ask for real examples, exceptions, decision thresholds and failure cases.
Job shadowing	Use when employees perform steps automatically or omit details in interviews.	Observe actual work, record tools, inputs, workarounds, interruptions and handoffs.
Process workshop	Use when work crosses departments or different teams describe it differently.	Map the end-to-end flow, resolve disagreement and assign accountability.
Artifact reconstruction	Use when the process is visible through tickets, emails, forms or completed deliverables.	Work backward from real cases to reconstruct decisions, dependencies and evidence.

5. Structured Interview Guide

A useful interview extracts observable details instead of general descriptions. Ask for specific cases, then test the explanation against actual evidence.

Purpose and triggers

- What outcome is this process supposed to produce?
- What event starts the work?
- Who requests it, and what information must they provide?

Normal path

- Walk me through the last time you completed this successfully.
- Which systems, documents or templates did you use?
- What tells you each step is complete?

Decision logic

- Where do you have to make a judgment call?
- What factors change the decision?
- What thresholds require approval or escalation?

Exceptions

- What goes wrong most often?
- Which unusual cases require a different path?
- What mistakes do new employees make?

Evidence and ownership

- Which source proves this answer is correct?
- Who is authorized to approve changes?
- How often should this knowledge be reviewed?

6. Ninety-Minute Knowledge Capture Workshop

Time	Activity	Output
0-10 min	Define scope and desired outcome	Agreed process boundaries
10-25 min	Map trigger, inputs and participants	Starting conditions and roles
25-50 min	Map the normal workflow	Ordered steps and handoffs
50-65 min	Identify decisions and exceptions	Rules, thresholds and failure paths
65-78 min	Identify source evidence and systems	Authoritative documents and records
78-88 min	Assign owner, approver and review date	Governance assignments
88-90 min	Confirm unresolved questions	Follow-up list

7. Convert Captured Material into a Knowledge Asset

Raw interview notes are not a knowledge asset. Convert them into a consistent format that an employee, search system or AI assistant can interpret reliably.

Field	Required Content
Title	Specific question, process or decision covered
Purpose	Business outcome supported
Audience	Roles allowed and expected to use it
Trigger	When the guidance applies
Inputs	Required information, files or approvals
Procedure	Ordered actions in plain language

Decision rules	Thresholds, conditions and judgment factors
Exceptions	Known deviations and escalation paths
Source evidence	Policies, records or approved references
Owner	Person accountable for accuracy
Approver	Person authorized to publish changes
Review date	Next required validation date
Sensitivity	Public, internal, confidential or restricted

8. Establish an Evidence Standard

Every important statement should be traceable to evidence. Use the following hierarchy when sources disagree:

1. Approved policy, contract, regulation or controlled procedure
2. Current system-of-record data or official form
3. Approved subject-matter expert decision
4. Documented operational convention supported by repeated cases
5. Unverified recollection or informal message

Items based only on memory should be marked provisional until validated. AI assistants should not present provisional knowledge as settled policy.

9. Validate Before Publishing

Validation Test	Question
Accuracy	Does the asset reflect current approved practice?
Completeness	Can the intended user act without needing undocumented clarification?
Evidence	Are claims tied to authoritative sources?
Consistency	Does it conflict with another published asset?
Permissions	Can only appropriate users retrieve it?
Usability	Can a new or less experienced employee understand it?
AI readiness	Are titles, headings, terminology and scope

	explicit enough for retrieval?

10. Capture Tacit Knowledge Without Creating Fiction

Tacit knowledge is experience-based judgment that experts may struggle to explain. Capture it through comparison rather than asking for abstract rules.

- Show two similar cases that produced different decisions. What changed?
- Describe a case that looked routine but was not. What warning sign did you notice?
- What would make you stop the normal process and escalate?
- Which shortcuts are safe, and which shortcuts create hidden risk?
- What do experienced employees check that new employees usually miss?

Record tacit guidance as decision support, not absolute policy, unless an authorized owner approves it as a formal rule.

11. The 30/60/90-Day Capture Program

Days 1-30: Identify and design

- Select one high-risk knowledge domain
- Build the inventory and score priorities
- Assign owners and approvers
- Choose capture methods and templates
- Capture 5-10 pilot assets

Days 31-60: Capture and validate

- Conduct interviews, shadowing and workshops
- Reconstruct real cases
- Draft and validate knowledge assets
- Resolve conflicting sources
- Test permissions and retrieval

Days 61-90: Publish and operationalize

- Publish approved assets in the knowledge hub
- Train users and owners
- Track unanswered questions and failed searches
- Set review dates and escalation rules
- Expand to the next priority domain

12. Metrics That Show Whether Capture Is Working

Metric	What It Measures
Coverage	Percentage of high-priority knowledge items with approved assets

Dependency reduction	Number of critical processes no longer dependent on one person
Retrieval success	Percentage of common questions answered from approved sources
Validation rate	Percentage of assets reviewed by the assigned owner on schedule
Time to proficiency	Time required for a new employee to perform defined tasks
Interruption reduction	Decrease in repeated questions directed to experts
Correction rate	Number of published assets requiring material correction

13. Common Failure Modes

Capturing everything: Creates volume without priority. Capture high-risk and high-frequency knowledge first.

Treating interviews as truth: Experts can misremember or describe the ideal process. Validate against evidence and real cases.

Publishing raw notes: Notes lack structure, ownership and clear scope. Convert them into governed assets.

Ignoring exceptions: The normal path is often already documented. Operational value frequently lies in exceptions and judgment.

No owner or review date: Knowledge becomes stale immediately when no one is accountable for maintaining it.

Mixing permissions: A technically accurate answer can still be unsafe if the wrong audience can retrieve it.

Using AI before cleanup: AI retrieval amplifies ambiguity, duplication and conflict already present in the source material.

14. Knowledge Capture Readiness Checklist

☐ A specific business outcome is defined

☐ Knowledge domains have been inventoried and scored

☐ Participants include both experts and downstream users

☐ Capture methods match the type of knowledge

☐ Source evidence is available or gaps are identified

☐ Asset templates and terminology are standardized

☐ Owners and approvers are assigned

☐ Permissions and sensitivity classifications are defined

☐ Validation and publishing workflows are agreed

☐ Review dates and success metrics are established

Conclusion

Knowledge capture is not a transcription exercise. It is a controlled process for turning experience, evidence and operational context into trusted assets that other people can use. The highest-value programs focus on business risk, collect real examples, document decisions and exceptions, validate against authoritative sources and assign long-term ownership.

Once captured knowledge is structured, governed and permission-aware, it can support onboarding, operations, customer service, management decisions, search and secure AI assistants. The technology becomes useful only after the organization has established what is true, who may see it and who is responsible for keeping it current.

About Pixeldust

Pixeldust designs secure AI Knowledge Hubs that help organizations organize institutional knowledge, make it accessible through Microsoft 365 and reduce dependence on individual employees. Learn more at askmaisy.com.