



LOGIC83 EXECUTIVE GUIDE

The Executive Guide to Knowledge Modernization

How to prepare organizational knowledge for better search, workflows, automation, and AI.

Discover / Organize / Modernize / Intelligence

A practical decision framework for leaders.



THE OPERATING PROBLEM

Most organizations do not have an information shortage. They have a trust problem.

Important knowledge is spread across shared drives, SharePoint, Teams, OneDrive, email, legacy systems, paper files, and employee memory. The problem becomes visible when people cannot identify the right version, the right owner, or the next action.

01

Knowledge

The facts, policies, procedures, decisions, and experience the organization relies on.

02

Workflow

How that knowledge reaches the right person and moves work forward.

03

Intelligence

Search, analysis, automation, and agents grounded in trusted information.

Fix the foundation first. Then make it intelligent.



RECOGNIZE THE PROBLEM

Five signals that knowledge has become an operations problem

01 Version conflict

Teams use different policies, forms, or procedures for the same work.

02 Search friction

Employees search several systems, ask a colleague, or recreate what they cannot find.

03 Ownership gaps

Nobody is clearly responsible for approving, reviewing, or retiring important content.

04 Continuity risk

Critical decisions and exceptions live only in the memory of experienced employees.

05 AI pressure

Leadership wants intelligent search or automation, but the source information cannot yet be trusted.

TRUST BEFORE INTELLIGENCE

AI cannot repair an authority problem.

An AI system can find and summarize information quickly. It cannot decide which conflicting policy leadership intended, who should own an undocumented process, or whether a sensitive action should be approved.



The practical rule

Before AI answers questions about the business, make sure it has the right information to answer from and the right controls to act within.



STAGE 01

Discover

Understand the information environment before changing it.

THE DECISION

**What exists,
what matters,
and where trust
breaks down.**

WORK THAT BELONGS IN THIS STAGE**01****Inventory sources**

Map where important documents, records, messages, and expertise live.

02**Expose risk**

Identify duplicates, obsolete content, version conflicts, access gaps, and continuity dependencies.

03**Prioritize value**

Focus on the knowledge areas that create the most operational value or risk.



STAGE 02

Organize

Create a governed body of organizational knowledge.

THE DECISION

**What to trust,
who owns it,
and how it
stays reliable.**

WORK THAT BELONGS IN THIS STAGE**01****Establish authority**

Identify approved versions and the people responsible for them.

02**Design structure**

Define content types, metadata, naming, security, retention, and lifecycle.

03**Remove uncertainty**

Deduplicate, classify, and retire content through documented decisions.



STAGE 03

Modernize

Put trusted knowledge in the platform that best supports the work.

THE DECISION

**A usable
knowledge
environment
people can
maintain.**

WORK THAT BELONGS IN THIS STAGE**01****Configure the environment**

Build search, permissions, version control, and navigation around actual use.

02**Move intentionally**

Migrate governed content in a sequence that supports adoption and reduces risk.

03**Enable ownership**

Give content owners a maintainable process for review, change, and retirement.



STAGE 04

Intelligence

Make trustworthy knowledge easier to find and act on.

THE DECISION

**Faster answers
and safer
automation
with human
control.**

WORK THAT BELONGS IN THIS STAGE**01****Ground the answer**

Use approved, permission-aware information for search, analysis, and Q&A.

02**Connect the workflow**

Route alerts, decisions, documents, and tasks with visible business rules.

03**Keep people in control**

Use approval, exceptions, traceability, and monitoring for important actions.



WHAT THE FIRST WORK SHOULD PRODUCE

A decision system, not a folder cleanup.

A strong first engagement should leave leadership with concrete artifacts that reduce uncertainty and make the next decision easier.

01

Knowledge inventory

Where important information lives, how it is used, and what needs attention.

02

Authority and risk matrix

What is trusted, who owns it, and where continuity or control is weak.

03

Target operating structure

A practical model for content, permissions, governance, search, and lifecycle.

04

Modernization roadmap

Sequenced decisions, pilots, and rollout priorities tied to business value.

LEADERSHIP CHECKLIST

Before approving a modernization or AI project, ask:

- 01 Do we know which information is authoritative?
- 02 Is every high-value knowledge area owned by a person or role?
- 03 Will permissions remain intact across search, workflow, and AI?
- 04 Where must a person approve, override, or investigate an action?
- 05 Can we explain what happened after an important decision?
- 06 Can the organization maintain the result after the project ends?

YOUR NEXT STEP

Take the private Knowledge Readiness Assessment

logic83.com/assessment