WORKBOOK

Building a Knowledge Platform

All the templates and checklists from the playbook, to print and fill in

Acht S · CAMPUS · INTERVIEWER

These worksheets belong to the playbook “Building a Knowledge Platform”. It tells you when you need them and how to use them. Start with the overall checklist: it shows the whole way and tells you which worksheet is due when.

help.8s.de/playbooks/wissensplattform/

Contents

Overall checklist 3

Self-tests 4

Project profile 6

Topic list 7

Framework checklist 8

Role plan 9

Content plan for the start 10

Test plan for the pilot 11

Go-live checklist 12

Template for the announcement 13

Editorial plan 14

One-page status report 15

© 2026 Acht S GmbH · All rights reserved

WORKSHEET

Overall checklist

What it is for: The whole path on one page
From chapter 8: At a glance

	STEP	WHAT YOU DO	CHAPTER
☐	**Recognise**	Take both self-tests, note the size.	1
☐	**Goal**	Fill in the project profile, goal in one sentence, agree it with the client.	2
☐	**Topics**	Choose a few starting topics, give each a responsible person.	2
☐	**Framework**	Clarify data protection, body, interviews, industry requirements.	2
☐	**Baseline values**	Measure one or two numbers before anything changes.	2
☐	**Roles**	Role plan with names and deputies, then assign permissions.	3
☐	**Structure**	Define categories and tags and write down the rules.	4
☐	**Content**	Answer the newcomers' twenty questions: by interview, with the AI generator or written by your team.	4
☐	**Approval**	Play through the path from draft to publication once, completely.	5
☐	**Pilot**	Small group, real tasks, fixed end, test accounts for each audience.	5
☐	**Go-live**	Checklist fulfilled, accounts created, announcement sent.	5
☐	**Support**	Reply quickly and close gaps for two weeks.	5
☐	**Operation**	Editorial plan in three rhythms, review date for every piece of content.	6
☐	**Report**	After 90 days one page for the client, then every quarter.	7

WORKSHEET

Self-tests

What it is for: Do you need a platform, and what size?
From chapter 1: Recognise and decide

Five warning signs that your team is losing knowledge

There are several versions of important documents.

☐ Yes ☐ No

New colleagues keep asking the same questions.

☐ Yes ☐ No

When a certain person is absent, work stops.

☐ Yes ☐ No

It is unclear who reviews content before it goes out.

☐ Yes ☐ No

Not everyone sees what is meant for them. Or they see too much.

☐ Yes ☐ No

Count how often you said "Yes".

0 to 1 Yes: Running well. Your team has its knowledge under control. Keep the five statements in mind, especially as the team grows.

2 to 3 Yes: Worth a look. The friction is there, but still manageable. The second test below shows whether a platform already makes sense.

4 to 5 Yes: Time to act. Your team pays every day in time and nerves. Take the second test, and if you like, talk to us.

Is CAMPUS right for you?

1 · Which problem should CAMPUS solve for you?

☐ Knowledge is scattered and hard to find.

☐ New employees should be onboarded faster and better. ☐ Mandatory training must be provable.

☐ Experience-based knowledge should not depend on individual people.

☐ I don't know exactly yet.

2 · How many people should use the content?

☐ Up to 20 (0) ☐ 20 to 100 (1) ☐ 100 to 500 (2) ☐ More than 500 (3)

3 · How many people will maintain content later?

☐ Nobody or just one person (0) ☐ Two to three (1) ☐ Four to ten (2)
☐ More than ten, from several areas (3)

4 · How is content reviewed today before it is published?

☐ Not at all: whoever writes, publishes. (0) ☐ Informally: someone takes a quick look. (1)
☐ One fixed person reviews. (2) ☐ Several reviewers, depending on the department. (3)

5 · Who should be allowed to see which content?

☐ Everyone sees everything. (0) ☐ A few groups have their own content. (1)
☐ Many audiences, clearly separated from each other. (3)

6 · Where does your knowledge live today?

☐ Mostly in people's heads. (0) ☐ In documents and PDFs, spread across several places. (1)
☐ In large collections, partly multilingual. (2)

7 · What should the reward system achieve?

☐ Nothing for now, we just want to provide content. ☐ Make learning progress visible.
☐ Enable proof of completion, certificates or competition.

Add up the points from questions 2 to 6. Questions 1 and 7 give no points; they feed into the notes below. Check the top row first.

Question 1 is open and 7 points at most: Clarify the goal first. It is still open what you would use CAMPUS for. That is not a no. But without a goal, structure and roles can't be planned sensibly. Read on in Chapter 2, Decision 1.

0 to 3 points: Probably not yet. At this size, an organised file store with clear responsibilities is often enough. CAMPUS becomes interesting as soon as more people use or maintain content, approval becomes necessary, or different groups should see different things.

4 to 7 points: Yes, as a compact start. A small setup covers your needs: few roles, few topics, productive quickly.

8 to 11 points: Yes, as an editorial team. You need a clear division of tasks between creating and approving, and a few groups so that content reaches the right people.

12 to 14 points: Yes, on a larger scale. With several departments and many audiences, a carefully planned roles and visibility concept pays off from the start.

WORKSHEET

Project profile

What it is for: Goal, success, responsibility, period on one page
From chapter 2: Plan the project

Answer each row in one or two sentences. If one is hard to answer, that is a sign that something still needs clarifying. The profile is also the first page of your later report.

Which problem are we solving?

Who is the target audience?

Our goal in one sentence

How do we measure success?
(baseline today)

Who is responsible, who is the client?

Desired period for pilot and go-live

How much time does the core team have per week?

WORKSHEET

Topic list

What it is for: Choose and assign starting topics
From chapter 2: Plan the project

TOPIC	IN THE START?	PRIORITY	WHERE DOES THE KNOWLEDGE LIVE?	RESPONSIBLE
	Yes · No		Heads · Documents	
	Yes · No		Heads · Documents	
	Yes · No		Heads · Documents	
	Yes · No		Heads · Documents	
	Yes · No		Heads · Documents	
	Yes · No		Heads · Documents	
	Yes · No		Heads · Documents	
	Yes · No		Heads · Documents	
	Yes · No		Heads · Documents	
	Yes · No		Heads · Documents	

WORKSHEET

Framework checklist

What it is for: Data protection, co-determination, requirements
From chapter 2: Plan the project

	CHECK ITEM	RESPONSIBLE	DONE ON
☐	Data protection clarified		
☐	Body involved (if there is one)		
☐	People in interviews informed		
☐	Industry requirements checked		
☐	Approval from the responsible office is available		

WORKSHEET

Role plan

What it is for: Who takes which role, with which permissions
From chapter 3: Team and roles

ROLE IN THE PROJECT	NAME	DEPUTY	PERMISSIONS IN CAMPUS	IN INTERVIEWER	TIME PER WEEK
Client			none in particular	–	
Platform lead			Super-Admin	Owner	
Editorial team			Editor	Member	
Approval			Reviewer	–	
User management			User-Admin	–	
Subject-matter experts			User	are interviewed	

WORKSHEET

Content plan for the start

What it is for: Which questions, which route, who, by when
From chapter 4: Content and structure

QUESTION THE CONTENT ANSWERS	CATEGORY	ROUTE	EDITORIAL	EXPERT CHECK	DONE BY
		Interview · AI generator · written by your team			
		Interview · AI generator · written by your team			
		Interview · AI generator · written by your team			
		Interview · AI generator · written by your team			
		Interview · AI generator · written by your team			
		Interview · AI generator · written by your team			
		Interview · AI generator · written by your team			
		Interview · AI generator · written by your team			
		Interview · AI generator · written by your team			
		Interview · AI generator · written by your team			

WORKSHEET

Test plan for the pilot

What it is for: Tasks for the pilot group
From chapter 5: Pilot and first go-live

TASK FOR THE PILOT GROUP	WHO TESTS	FOUND?	WHAT WAS MISSING?
		Yes · Partly · No	
		Yes · Partly · No	
		Yes · Partly · No	
One piece of content from draft all the way to publication	Editorial team and approval	Yes · Partly · No	
Test account for each audience: does it see the right things?	Platform lead	Yes · Partly · No	
		Yes · Partly · No	
		Yes · Partly · No	
		Yes · Partly · No	
		Yes · Partly · No	
		Yes · Partly · No	

WORKSHEET

Go-live checklist

What it is for: Are you ready?
From chapter 5: Pilot and first go-live

	CRITERION	WHO CONFIRMS
☐	The approval path has been run through completely at least once.	
☐	Every starting topic answers the most frequent questions.	
☐	Visibility has been checked with test accounts.	
☐	Feedback from the pilot has been incorporated or deliberately postponed.	
☐	Accounts and groups are prepared.	
☐	It is clear who answers questions, and this is stated in the announcement.	
☐	The team leads are informed and announce it in their teams.	
☐	The framework checklist from Chapter 2 is done.	

WORKSHEET

Template for the announcement

What it is for: The message for the launch
From chapter 5: Pilot and first go-live

Subject: From today: our knowledge in one place

Hello everyone,

from today you will find our new knowledge platform at [address]. At launch it has everything on [starting topics]. You sign in with [sign-in method].

What is missing will be added. Tell us what you looked for and did not find: [contact person, channel].
[If Bryan is activated: You can also put questions directly to Bryan, at the bottom right of every page.]

Best regards
[Client]

WORKSHEET

Editorial plan

What it is for: Topics for the coming months
From chapter 6: After go-live

MONTH	OCCASION OR TOPIC	PLANNED CONTENT	ROUTE	RESPONSIBLE	STATUS
			Interview · AI generator · written by your team		
			Interview · AI generator · written by your team		
			Interview · AI generator · written by your team		
			Interview · AI generator · written by your team		
			Interview · AI generator · written by your team		
			Interview · AI generator · written by your team		
			Interview · AI generator · written by your team		
			Interview · AI generator · written by your team		
			Interview · AI generator · written by your team		

WORKSHEET

One-page status report

What it is for: The report to the client
From chapter 7: Measure and report success

The status in one sentence

Our goal (from the project profile)

Metric · baseline · today · target

Metric · baseline · today · target

What went well

What did not go well, and why

Next steps by

What we need, from whom, by when