Knowledge Management in ServiceNow: Concepts, Purpose, and Examples

- **Session promise:** explain KM concepts, connect KM to outcomes, apply the lifecycle, use real examples
- **Scope:** ServiceNow KM for knowledge base owners, service desk staff, reviewers, and trainers
- **Agenda:** concepts → purpose → features → lifecycle → governance → finding knowledge → worked examples
- **Guiding questions:** where knowledge lives, who owns it, who reviews it, how it is found



Core Concepts: Knowledge Bases, Articles, and the Knowledge Workflow

- KM captures, structures, shares, and maintains knowledge where work happens: incidents, cases, requests, portals
- Knowledge bases are containers — each with its own owner, managers, user-criteria access, categories, and publish/retire workflows
- Articles are structured records with short description, category, body, metadata, and Valid to date
- Workflow: request → draft → manager review → publish → reuse → retire with approval
- Building blocks: templates, knowledge blocks, taxonomy, versioning, subscriptions, feedback and ratings



Why Knowledge Management Matters: Purpose and Business Value



- **Purpose:** consistent answers across channels, faster resolution, stronger self-service
- **Service desk:** cases with attached KB articles solved 52% faster (ServiceNow KCS)
- **Trainers:** one source of truth — knowledge is where AI goes to learn
- **Owners:** named accountability, measurable quality, fewer stale or duplicate articles
- **Organization:** audit-ready processes and knowledge treated as an operational asset
- **Measure it:** attach rate, select-through rate, helpfulness ratings, time to publish

Key ServiceNow Knowledge Features at a Glance

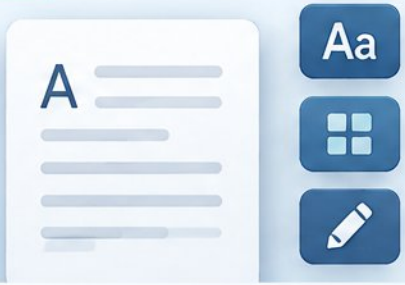
Empower people with trusted knowledge

Knowledge base setup



- Knowledge base setup: owners, managers, user criteria, publish and retire workflows

Authoring



- Authoring: templates, rich-text editor, knowledge blocks, Word add-in, ServiceNow Otto drafts

Search



- Search: keyword plus AI Search hybrid, knowledge block, indexing, Employee Center portals

Feedback signals



- Feedback signals: views, ratings, mark-as-helpful, comments, article flags, feedback tasks

Governance



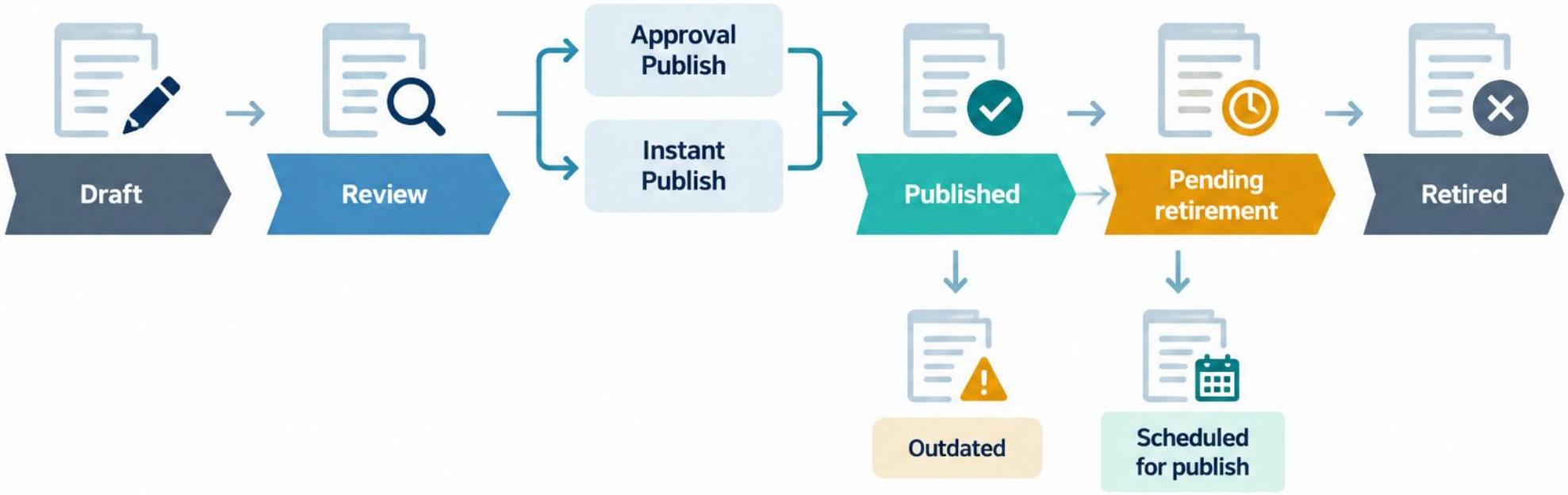
- Governance: approval workflows, Valid to dates, Article Quality Index checklist per knowledge base

Newer, Now Assist-dependent



- Newer, Now Assist-dependent: Knowledge Center, Health Score, gap insights, duplicate merge

The Article Lifecycle in Practice: Draft, Review, Publish, Maintain



- Draft → Review → Published → Pending retirement → Retired, plus Scheduled for publish and Outdated
- Published version moves to Outdated automatically when a newer version is published
- Draft: visible only to author, reviser, owners, admins, and ownership group members
- Review: only Approvals list users act; approve, reject to Draft, or comment
- Publishing workflows: Approval Publish vs. Instant Publish; retirement mirrors this
- Valid to date drives monthly expiry reminder emails; retired content is invisible to users

Governance and Roles: Who Owns, Reviews, and Approves Knowledge

PEOPLE
PROCESS
BETTER KNOWLEDGE

Role map: process owner, knowledge manager, KB owner and managers, authors, reviewers, coaches

Guardrails: disable instant publish and instant retire; enable expiry notifications and article flagging

Access: user criteria define read and contribute rights; scoped KBs restrict admin access

Content standards: shared templates, required metadata, headings, plain language, text alternatives

Knowledge blocks keep recurring details current; ownership matrix names a person per KB

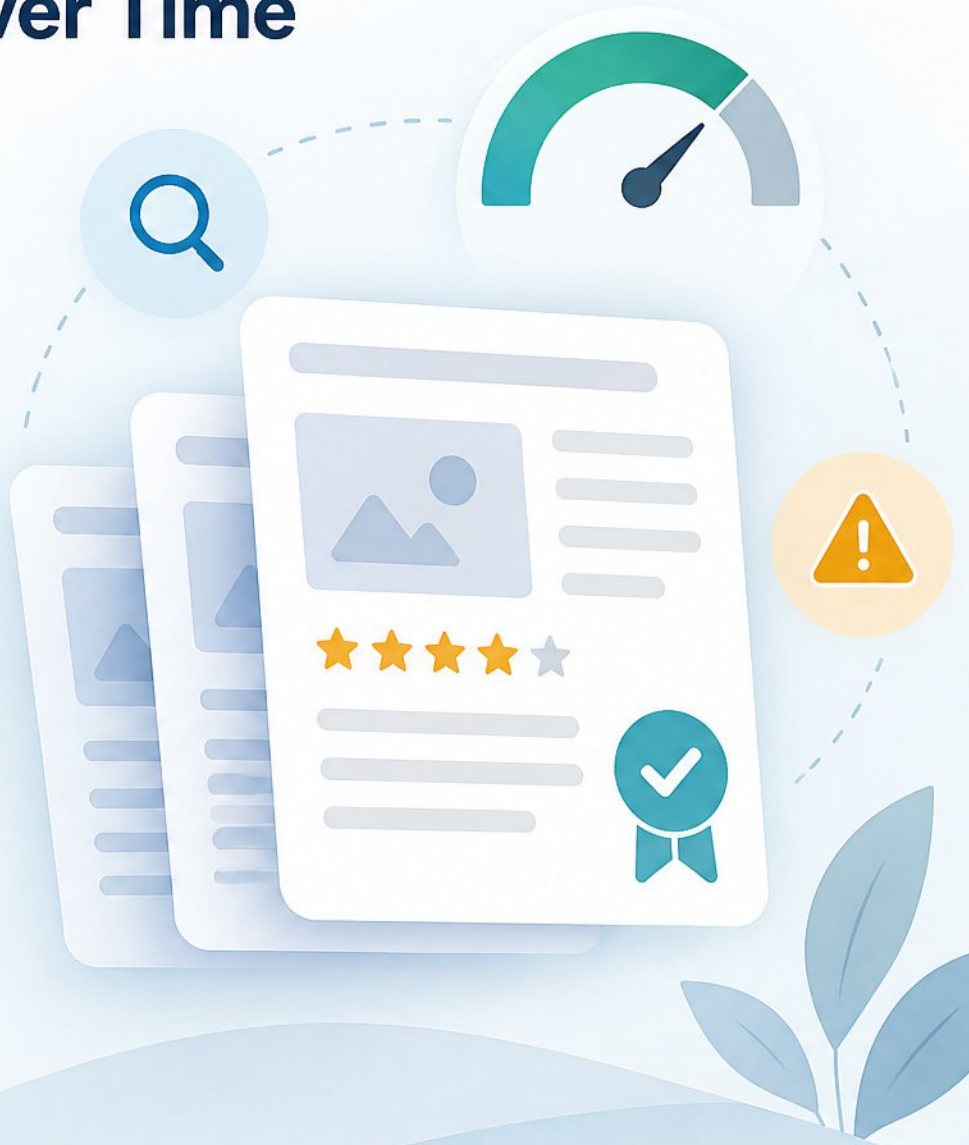
Ownership Matrix (Example)

Knowledge Base / Category	Process owner	Knowledge manager	KB owner and managers	Author	Reviewer	Coach
Policies	●	●	●	●	●	●
Processes	●	●	●	●	●	●
How-to Guides	●	●	●	●	●	●
Troubleshooting	●	●	●	●	●	●
Reference	●	●	●	●	●	●
Training	●	●	●	●	●	●



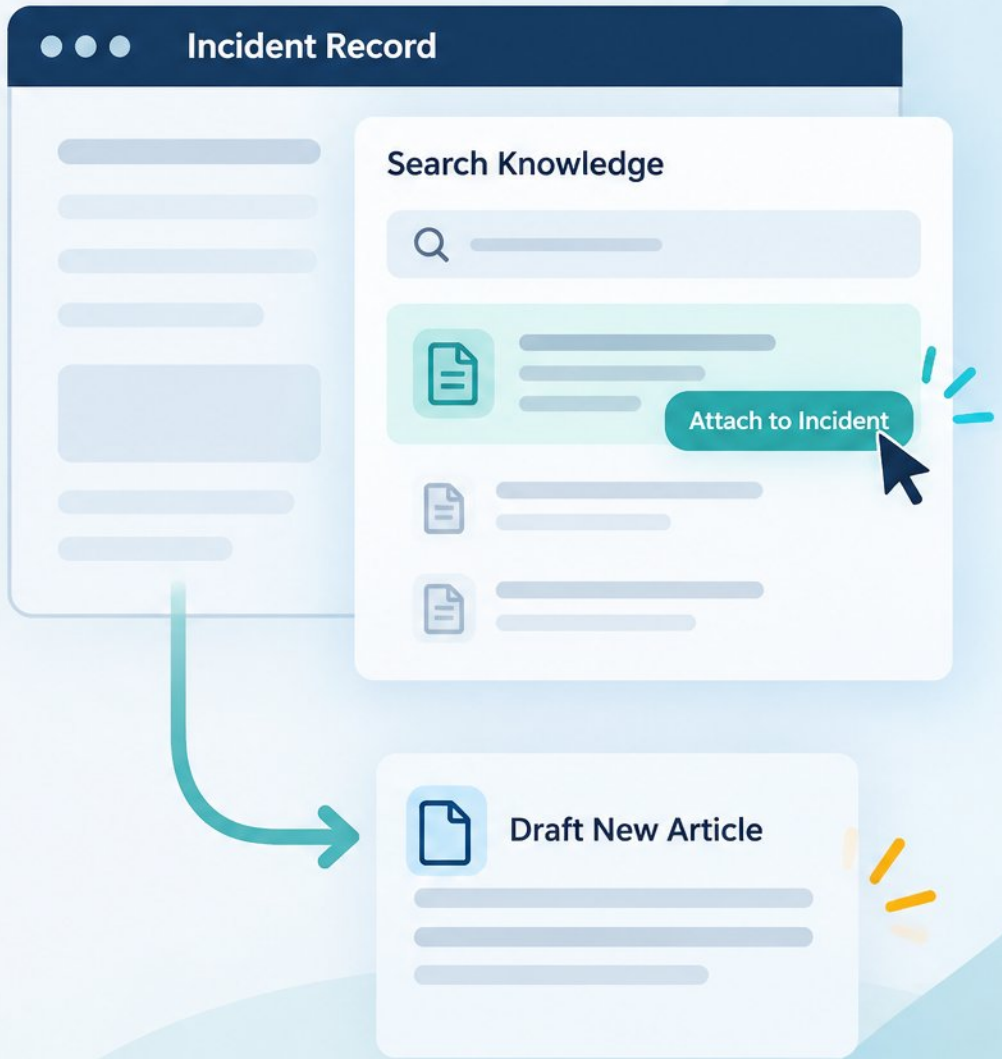
Content Quality and Review Practices That Hold Up Over Time

- Peer review with checklists and AQI sampling
- Audit articles stale over a year, missing metadata, duplicates
- Default one-year validity; shorter for fast-changing content
- Track published %, ratings, select-through rate, and time to publish
- Knowledge Health Score and Article Optimization scans flag issues
- Retire rather than delete; recertify with a real read

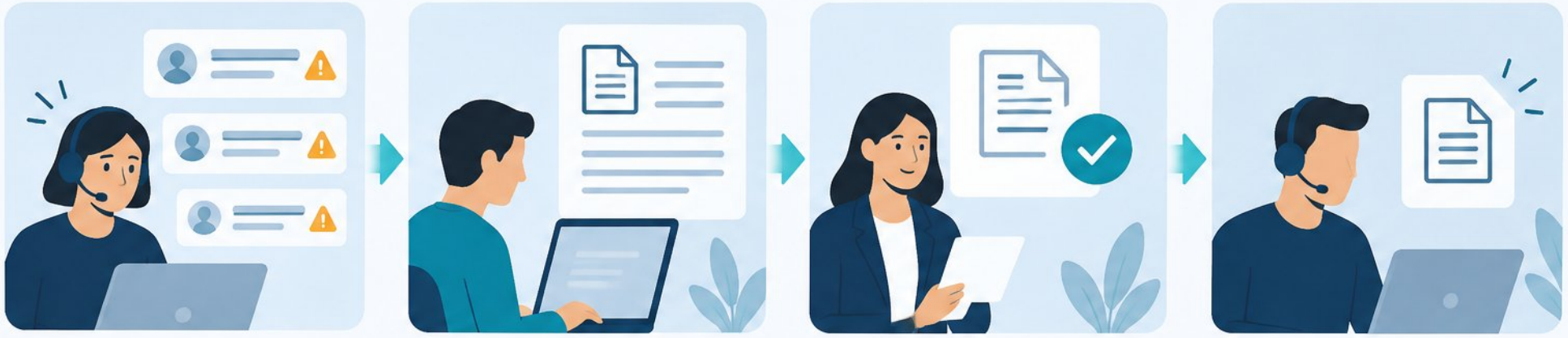


Finding and Using Knowledge During Support Work

- Hybrid search blends keywords with semantic understanding; fewer zero-result searches
- Agent tactics: use the user's words, filter by knowledge base, check previews
- Attach articles to incidents and problems; knowledge panels surface answers in-record
- No article? Draft from the incident — ServiceNow Otto can draft from similar records
- Wrong or missing content: flag it, give feedback, and close the gap
- Portal and Employee Center surface articles; AI Search summarizes answers



Worked Example 1: From Recurring Incident to Published Resolution Article



- Same VPN issue, same fix — known only to two senior agents
- Search first; no article exists, so draft from the incident
- Draft → Review → Published with a Valid to date
- Author: solving agent; reviewer: service desk knowledge manager
- Success: higher attach rate, shorter handle time, fewer escalations

Worked Example 2: A Service Desk Onboarding Knowledge Base for Trainers

Scenario: new agents need one place for processes, tools, tone, and escalation rules

Structure: dedicated KB with training-lead owner, managers, and clear categories

Knowledge blocks hold support hours, contact details, and compliance notices — update once

Approval Publish workflow: training content reviewed before new agents rely on it

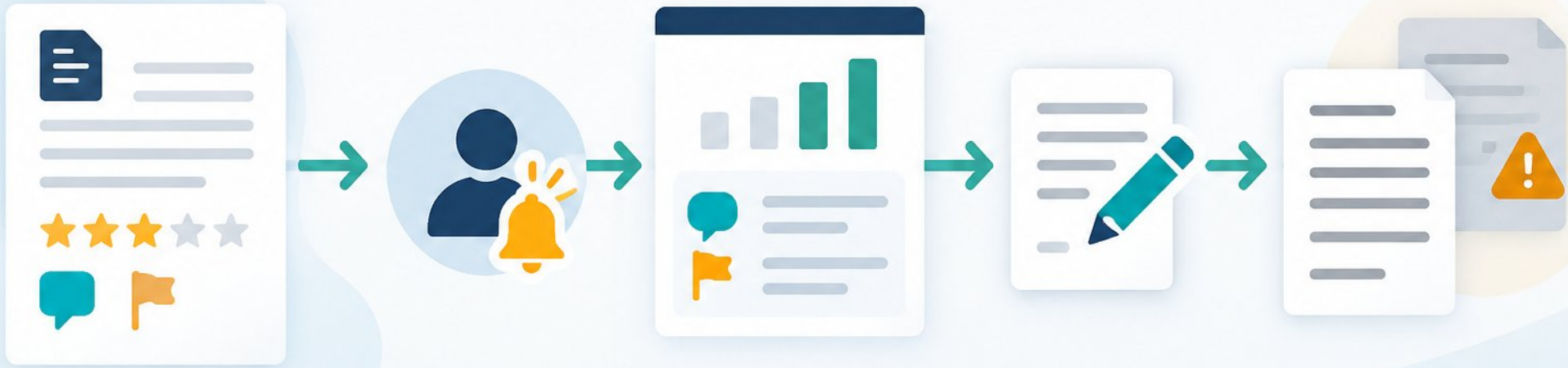
Trainer benefit: one source of truth for lesson plans, on-the-job reference, and AI answers

Success: shorter time-to-proficiency and fewer "where do I find…" questions



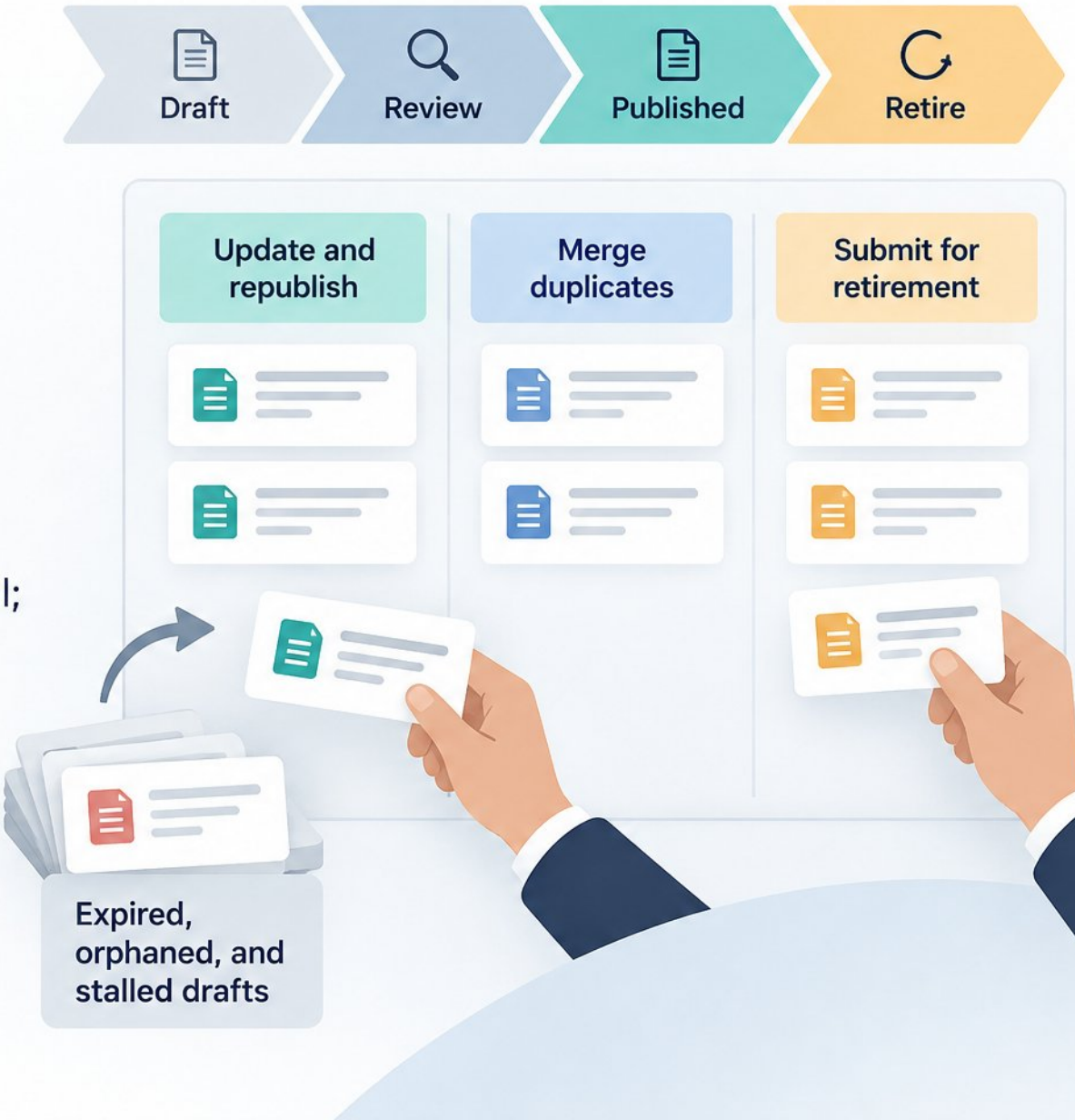
Worked Example 3: A User-Facing Article Improved by Feedback

- Portal article on requesting access goes stale after the form changes
- Ratings, comments, and flags route to the owner as feedback tasks
- Owner checks the Overview dashboard for not-helpful and flagged counts
- Checkout, edit, resubmit through Review; readers see old version until published
- Copy-pasted instructions would need five fixes, knowledge blocks prevent that



Worked Example 4: A Review-Driven Cleanup and Retirement Cycle

- Quarterly review finds duplicates, expired articles, stalled drafts, and orphaned content
- Triage by evidence: dashboard reports, duplicate detection, and flagged counts build the work list
- Decide per article: update and republish, merge duplicates, or submit for retirement approval
- Retirement needs manager approval; article numbers cannot be reused
- Reassign orphaned articles to a named owner before cleanup
- Success: smaller trustworthy base and a repeatable quarterly rhythm



Common Pitfalls and Practical First Steps by Role

Avoid common mistakes. Take practical steps. Build a stronger knowledge base together.

Pitfalls

- unclear ownership
- review backlog
- overcomplicated taxonomy
- instant publishing
- duplicated text
- ignored feedback

Good practices

- start with high-value knowledge bases
- standardize templates
- track a small metric set

Owners

- inventory articles and owners
- fix access and workflows
- clear Draft backlog
- set quarterly reviews

Service desk

- search before writing
- attach articles
- capture drafts
- submit feedback on misleading content

Reviewers

- check accuracy, clarity, audience fit
- named owner
- valid-to date
- metadata
- publication channel

KNOWLEDGE TODAY
STRONGER TOMORROW

Key Takeaways, Knowledge Check, and Next Steps

Same knowledge. Greater impact.



Key Takeaways

- Recap: articles are workflow records, not documents — lifecycle and governance keep them trustworthy.

Knowledge Check

- Knowledge check: article in Review while approvers decide; customer-facing bases use Approval Publish.
- Knowledge check: past Valid to but still correct? Extend and republish. Retirement needs an approver.
- No answer mid-incident? Search before writing, then capture a draft from the record.

Next Steps

- Wrong phone number in six articles? Knowledge blocks prevent copy-paste decay.
- Next 30 days: owners audit, agents attach, reviewers use checklists, trainers rebuild a module.

Keep the knowledge moving forward.

Trusted articles. Better support. Greater customer outcomes.

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