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Procedure Platform Evaluation Scorecard

A three-gate method for testing knowledge management and procedure platforms in less than half a day, with a scorecard you can run on every finalist.

GATE 1

Get it right

Will your team be able to create content at the required pace?

GATE 2

Do it right

Can frontline employees use the content successfully to do their job?

GATE 3

Keep it right

Can your team keep content up to date as things change?

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How to use this guide

Read pages 3–6 to understand the three gates. Then plan your sessions with page 7 and fill in the worksheet on pages 8–9 for every finalist.



Evaluating Knowledge Management or Procedure Platforms



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Most knowledge management evaluations test the wrong thing. Teams compare feature lists, sit through polished demos, and pick the tool that looks best in a conference room. Then the rollout drags on, employees never really adopt it, and they live with that choice for years.

I've worked in knowledge management and training for more than 20 years, much of it selling software. I've watched organizations evaluate these tools every way you can imagine: 1,000-question RFPs, a room full of people voting on which demo looked nicest, or one person's recommendation. I've also worked with a lot of teams who regretted the choice they made.

This guide will outline a better way to evaluate knowledge management or procedure platforms. It's a three-gate evaluation you can run in less than half a day, with a scorecard at the end that you can use.

Who this guide is for

This guide is for you if most of these sound familiar:

- Your organization has a lot of procedures.
- Some of them are complex.
- They change often.
- Getting a procedure wrong has real consequences.

It's written mainly for regulated industries like financial institutions, healthcare, and government agencies. The same approach works for any business with complex processes that change frequently.

Stop shopping for features. Start removing risk.

Business software exists to change business outcomes. The biggest threat to that is a failed implementation. A feature doesn't matter if nobody uses it to change how work gets done.

So spend less time hunting for features you like and more time asking one question: **what could make this implementation fail?** Then test each of those risks directly.

Think of each risk as a gate. If the solution doesn't pass any one of them, you should probably look for a different solution.

Step 0: Confirm the table stakes

Before you run any gates, check the basics. These don't set one platform apart from another. Every platform in a regulated environment needs them, so missing any one is enough to cross a platform off your list.

Ask to see each one live in the product. A slide or a “yes” on a questionnaire doesn't count.

Revision management

Some form of revision management should be required.

Audit logs

If you are working in a regulated industry, these are crucial.

Reporting

No reporting means no visibility and no accountability. Don’t choose a system with no reporting.

Authoring and viewing permissions

Can you control who can author, approve, and publish? Can you do that for different pieces or collections of content?

If a platform clears all four, move on to the gates.

The three gates: get it right, do it right, keep it right

Every knowledge management or procedure platform implementation lives or dies on three questions:

GATE 1

Get it right

Will your team be able to create content at the required pace?

→

GATE 2

Do it right

Will your frontline employees be able to use the content successfully to do their job?

→

GATE 3

Keep it right

Can your team keep content up to date as things change?

Fail any one of these, and you end up in the same place: employees relying on tribal knowledge and a content team that's always behind.

Run the gates in order. Gate 1 comes first for a reason. If your team can't create content quickly, nothing after it matters.

Gate 1: Get it right (capturing procedures)

Gate 1 › Gate 2 › Gate 3

> **The risk:** Your team can't document procedures fast enough, and the project drags on.

No team has unlimited time to write procedures. Your subject matter experts (SMEs) will have to work with a content team to update what exists and fill the gaps. I've seen knowledge management projects run for years because the team could never capture everything it needed. So the first test is speed.

How to test it

Score it: Gate 1 on page 8 →

1. **Improve an existing procedure.** Bring one of your real procedures into the platform. How easy is it to review? How easy is it to improve it? Is it clearer when you're done?
2. **Create and publish a new procedure.** Could your authors use the tools without help? How long did it take? Did the software nudge them toward best practices?
3. **Capture a process with an SME.** Could the SME collaborate easily? How long did it take from start to finish?

If this is slow or painful, stop here. Nothing else matters if you can't create content at the pace you need.

Gate 2: Do it right (driving performance)

Gate 1 › Gate 2 › Gate 3

> **The risk:** Your employees can't find the right procedure, or can't follow it correctly when it counts.

This is the gate most evaluations skip, because the only people giving feedback are the content authors. But content is worthless if employees can't find it and follow it. A wall of text no longer cuts it when compliance and competence matter.

How to test it

Score it: Gate 2 on page 9 →

1. **Pick two or three frontline employees.** They should be people who'll use the content every day.
2. **Give them a scenario that often causes mistakes or confusion.**
3. **Have them find the procedure for that scenario** in the platform. Did they land on the right one?
4. **Ask them to talk through using it** as they perform the procedure. Can they follow it without help?

Two tips to get a fair read

- **Coach the search.** Many employees come from tools that only use keyword search, so they've learned to guess article titles. A modern system should let them describe the situation in their own words instead. Show them how before the test, then watch whether the platform delivers.
- **Orient them to the format.** The new procedures may be more interactive than what they're used to. A two-minute walkthrough of those features gives you a more accurate result.

Gate 3: Keep it right (managing change)

Gate 1 › Gate 2 › Gate 3

> **The risk:** Content goes out of date, and employees don't find out when something changes.

Change is the single biggest challenge for any procedure or knowledge management program. There's a graveyard of past solutions that couldn't keep up: giant video libraries, recorded webinars, massive procedure manuals, interactive simulations. They all started with good intentions. Then things changed, and the content didn't.

How to test it

Score it: Gate 3 on page 9 →

1. **Introduce a change to an existing procedure.** Use something realistic: new screenshots, a policy update, or a new decision branch.
2. **Have your authors update and publish it.** Does it take minutes, hours, or days? That difference is crucial.
3. **Let employees know about the change.** Is there a clear workflow for notifying them? Can you see who has and hasn't seen the update?

Make every finalist do the work in front of you

A good evaluation is about risk, not features. When you test whether your team can create content, whether employees can use it, and whether you can keep it current, you remove the biggest reasons implementations fail. Your whole team can then back the decision with confidence.

If you're evaluating platforms right now, run the scorecard on the next pages on every finalist. Don't settle for a demo. Make them do the work in front of you.



The evaluation scorecard

Use this scorecard to keep every platform on the same test. It has two parts: a planning sheet so you can line up the right people, and a checklist you fill in during each session. Answer each question yes or no. Every question is written so that **yes is a pass**. Use the blank rows at the bottom of each section to add your own requirements. The worksheet on pages 8–9 is fillable: type platform names, click Yes or No, and save the PDF.

Part 1: Plan your sessions

Gate	Who to invite	Time	What to bring
Table stakes	Evaluation lead	15 min	Your list of compliance requirements, target launch date
Get it right	Content authors, plus one SME	30–60 min	One existing procedure and one process that isn't documented yet
Do it right	2–3 frontline employees	30–45 min	One or two scenarios that often cause mistakes
Keep it right	Content authors	15–30 min	A realistic change: a policy update, new screenshots, or a new decision branch

Total time: about 1.5 to 2.5 hours per platform.

How to read your results

Any "no" in table stakes:
Cross the platform off your list.

Mostly "no" in Gate 1:
Stop the evaluation. You won't be able to build content fast enough to launch.

Mostly "no" in Gate 2 or Gate 3:
Look elsewhere. The platform won't change how work gets done, or it won't stay accurate.

"Yes" across all three gates:
You have a finalist your whole team can feel confident about.

These are starting points. Adjust the questions to fit your organization, but keep them the same for every platform.

Part 2: Score each platform

Yes is a pass. Type each platform's name, mark Yes or No, and add your own requirements in the blank rows.

Platform A _____ **Platform B** _____ **Platform C** _____

Table stakes	Platform A	Platform B	Platform C
Can you see revision history for each procedure?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Can you see an audit log of changes made?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Can you see reporting on content use?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Can you set author, approver, and publisher permissions at different content levels?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Yes count			

Gate 1: Get it right	Platform A	Platform B	Platform C
Did your authors improve an existing procedure without outside help?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Did they create and publish a new procedure within the session?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Did the software guide them toward best practices?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Could your SME collaborate easily on a new procedure?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
At this pace, could you hit your launch date?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Yes count			

Want help running this evaluation? We'll run all three gates with you. screensteps.com/demo

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Part 2: Score each platform

Yes is a pass. Type each platform's name, mark Yes or No, and add your own requirements in the blank rows.

Platform A _____ **Platform B** _____ **Platform C** _____

Gate 2: Do it right	Platform A	Platform B	Platform C
Did employees find the right procedure by describing the situation in their own words (not guessing the procedure title)?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Did they follow the procedure correctly without help?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Did they say they'd use it on the job?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Yes count	_____	_____	_____

Gate 3: Keep it right	Platform A	Platform B	Platform C
Did your authors update and publish the change within the session, without outside help?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Is there a clear workflow to notify employees of the change?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Can you see who has and hasn't seen the change?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
_____	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Yes count	_____	_____	_____

Your decision	Platform A	Platform B	Platform C
Advance this platform? Use the table stakes and three gate totals.	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Notes			

Want help running this evaluation? We'll run all three gates with you. screensteps.com/demo

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Bonus: Running this evaluation with ScreenSteps

If ScreenSteps is on your list, here's how we suggest running each gate.

Gate	Who	What to test	What passing looks like	Time
Get it right	Content authors, plus an SME if available	AI-assisted creation, image capture, simple formatting, and AI decision tree creation	Your authors build and publish a procedure, including a decision tree, without the rep doing it for them	30–60 min with a ScreenSteps rep, or complete a 20-minute course first to go on your own
Do it right	2–3 frontline employees	Search for and follow one or two procedures that usually trip them up, talking through what they notice	Employees find the right procedure on their own and follow it correctly start to finish	30–45 min
Keep it right	Content authors	Edit a procedure you created in Gate 1, then send a change notification	The update is published and the notification sent within the session, and you can see who has seen the change	15–30 min

Want help running this evaluation? Reach out to ScreenSteps and we'll walk through all three gates with you in a working session.

Book a working session