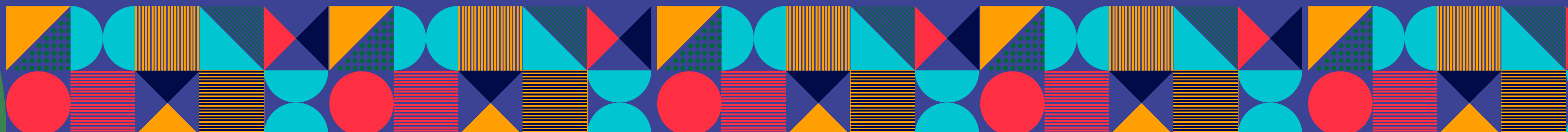




Knowledge Management Tools

Exploring core workflows, strategies, and tools for collaboration & information sharing

August 2025



Session Objectives

By the end of this session, participants will:

- Understand the basics of Knowledge Management (KM)
- Explore core KM workflows for CSOs
- Learn the importance of technology in KM
- Review practical KM tools & strategies



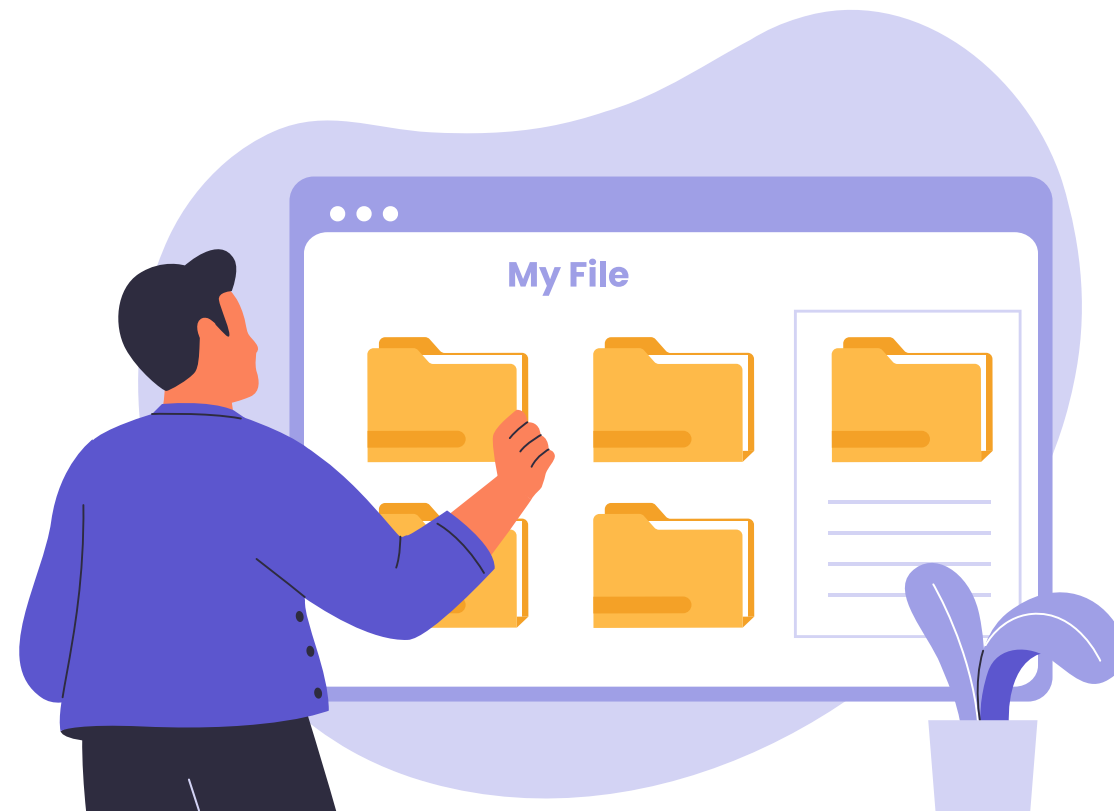
Refresher

What is Knowledge Management?



Refresher

Two types of knowledge



Why KM Matters for CSOs

- Prevents knowledge loss when staff leave
- Improves collaboration & institutional memory
- Strengthens advocacy & evidence-based work
- Avoids duplication of efforts



Core KM Workflows

- 1. Capture/Collect** – gathering data, lessons, stories
- 2. Organize/Store** – categorizing, databases, filing systems
- 3. Share/Disseminate** – meetings, portals, platforms
- 4. Use/Apply** – turning knowledge into action & advocacy



What is the Role of Technology in KM

The role of technology

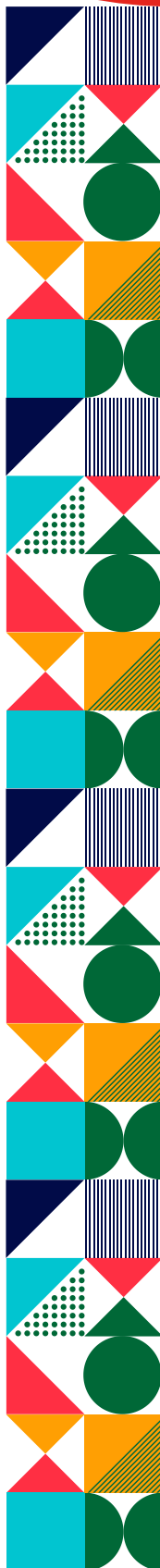
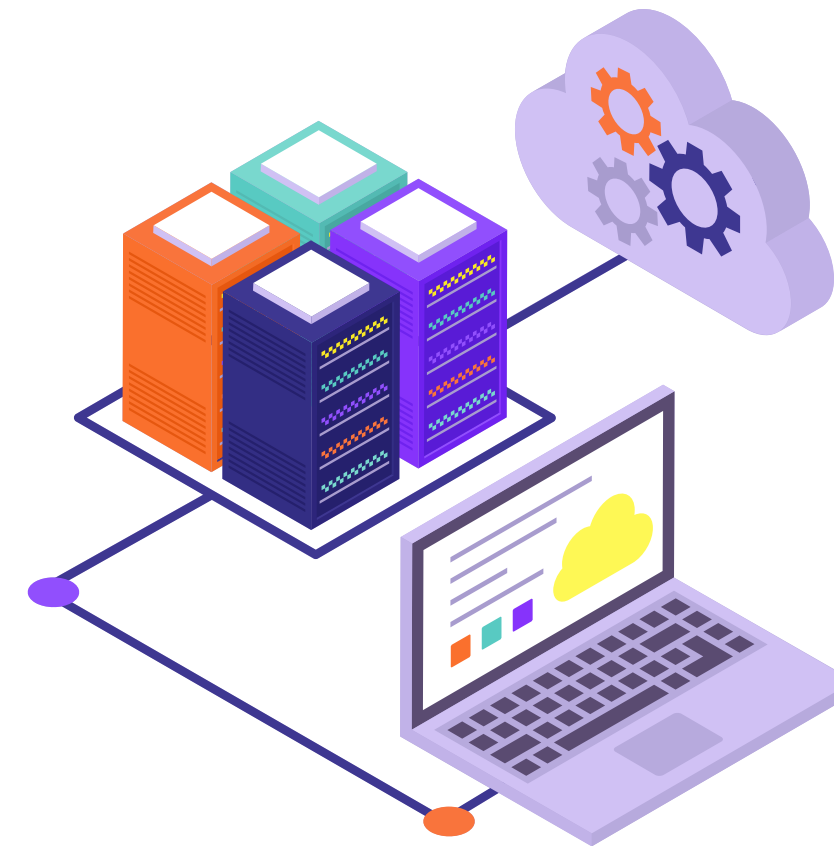
Technology is one of the pillars of KM that optimizes organisational development



The role of technology

- Technology enables faster, scalable, accessible KM:
- Centralized knowledge
- Easier collaboration
- Stronger institutional memory

Challenges: cost, digital literacy, sustainability



KM Tools – File Sharing & Collaboration

- Google Workspace, Microsoft 365, Nextcloud
- Slack, Microsoft Teams, Mattermost

Use: Share documents, communicate in real-time, manage teamwork



KM Tools – Knowledge Repositories & CRMs

- Notion, Confluence, Airtable, Salesforce
- Use: Centralize program data, donor info, case management, and institutional memory.

Example: Salesforce helps CSOs track donors, grants, and client interactions while storing institutional knowledge.



KM Tools: Project & Data Management

- Trello, Asana, Monday.com
- KoboToolbox, DHIS2

Use: Organize tasks, manage projects, collect & analyze field data

Practical KM Strategies for CSOs

- Start small – even structured Google Drive folders count
- Assign KM champions in your team
 - Standardize templates & file naming conventions
- Create regular spaces for sharing lessons (after-action reviews)

Key Takeaways

KM = Culture + Process + Tools

- Different tools serve different parts of the KM cycle
- Salesforce & CRMs support donor, client & program knowledge
- Technology enables scale, but culture ensures sustainability

Commitment Round: One KM tool you will try in your organisation

Thank you!