Choosing a knowledge platform: 15 criteria for tool evaluation

The practical guide to IT buying and project management

The market for knowledge and AI platforms is confusing. Traditional DMSs, enterprise search, knowledge wikis, generic AI assistants – every tool promises to make knowledge more accessible. This checklist helps you separate the wheat from the chaff, with 15 specific evaluation criteria across five areas. Use it as a comparison grid for your shortlist.

a

Connectivity & integration

- Are standard connectors available for your key systems (e.g. SharePoint, Confluence, file system, CRM, content management system)?
- Can custom systems also be integrated?
- Are all relevant formats supported (e.g. Office, PDF, XML, DITA, images, videos)?
- Are changes in source systems automatically synchronised – without the need for duplicate maintenance?

b

Structure & context

- Can knowledge be organised by topic (products, processes, roles) beyond simple folder structures?
- Is content automatically classified and enriched with missing metadata?
- Can different views be created for different user groups?

c

Search & AI

- Does the search function understand meaning – not just keywords (semantic search)?
- Does the AI provide answers based solely on your knowledge, or does it „hallucinate“ them from the internet?
- Are AI answers verifiable, with sources cited and the option to access them?

d

Operations & security

- GDPR-compliant and hosted in the EU/Germany?
- Is there a roles and permissions model with SSO integration?
- Cloud-scalable – does the platform grow with your requirements?

e

Introduction & profitability

- Can the first areas of knowledge be put to productive use within a few weeks, without a lengthy IT project?
- Can the tool cope with imperfect data quality, or do you have to spend a lot of time preparing the content in advance?

Bonus question

What does the platform not offer? A good tool knows what it does not cover (e.g. it is not a DMS, not an authoring system, not an ERP replacement). This helps to avoid poor investments and unrealistic expectations.

Assessment criteria

Ordne jedem Kriterium 0 bis 2 Punkte zu (0 = nicht erfüllt, 1 = teilweise, 2 = vollständig). Maximalwert: 30 Punkte. Plattformen unter 20 Punkten solltest du kritisch hinterfragen. Meist fehlt ihnen entweder die Integrationstiefe oder die KI-Reife.

Conclusion

A good knowledge platform is more than just a search tool and more than just a chatbot. It connects, organises and makes knowledge come to life — three things in one. JUNOfy is built precisely to meet these requirements and is deliberately positioned as a knowledge and context layer on top of your systems — not as a replacement for them. We would be happy to guide you through each of the 15 criteria based on your specific use case.

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