

# Company Knowledge Base Setup Guide

## Transform Company Knowledge into AI-Accessible Intelligence

By Justin P. Barrett | justinbarrett.com | Alive LLC

---

### Why Build a Knowledge Base?

Your company's most valuable asset isn't your code or your product — it's the institutional knowledge trapped in emails, Slack threads, documents, and people's heads. A knowledge base makes this searchable and AI-accessible, so anyone (human or agent) can find answers instantly.

### Step 1: Audit Your Knowledge Sources

- & Email archives (how many years? which accounts?)
- & Shared drives (Google Drive, Dropbox, OneDrive)
- & Slack/Teams message history
- & CRM notes and deal histories
- & Support ticket archives
- & SOPs and process documents
- & Meeting recordings and transcripts
- & Employee onboarding materials
- & Product documentation
- & Sales collateral and case studies

### Step 2: Define Your Taxonomy

Organize knowledge into searchable categories:

- **By Function**  
Sales, Marketing, Operations, Product, Finance, Legal, HR
- **By Type**  
SOPs, Policies, Templates, Case Studies, Meeting Notes, Research
- **By Status**  
Active, Archived, Draft, Needs Review
- **By Access Level**  
All employees, Management, Specific teams, Confidential

### Step 3: Extract and Structure

#### 1. Email Processing

Use AI to extract key information from email threads: decisions made, commitments, contact details, project updates.  
Tools: custom scripts or Zapier + ChatGPT.

## 2. Document Processing

Upload documents to a system that can chunk, embed, and index them for semantic search. Tools: NotebookLM, Pinecone + OpenAI, or custom RAG pipeline.

## 3. Meeting Intelligence

Transcribe all meetings going forward. Extract action items, decisions, and key discussions. Tools: Fireflies, Otter.ai, Granola.

## 4. Conversational Knowledge

Export Slack/Teams channels with important discussions. Use AI to summarize threads into knowledge articles.

# Step 4: Choose Your Platform

- **Simple: Notion + Notion AI**

Best for small teams (<20). Wiki-style with built-in AI search. Easy to maintain.

- **Medium: Custom GPT + uploaded docs**

Upload your key documents to a Custom GPT. Team queries it like an expert colleague.

- **Advanced: RAG pipeline (Pinecone/Weaviate + OpenAI)**

For large document sets. Semantic search across all company knowledge. Requires some technical setup.

# Step 5: Maintenance Protocol

- & Assign a knowledge base owner (or rotate monthly)
- & New documents added within 48 hours of creation
- & Monthly review: remove outdated content, update changed processes
- & Quarterly audit: check search quality, identify gaps
- & Team feedback channel: 'I couldn't find X' reports

## About the Author

Justin P. Barrett is an entrepreneur, artist, and author. As CEO of Eyesafe, he built the global standard for display health technology. As founder of Alive LLC, he helps lean teams implement AI systems that actually work — agent architectures, knowledge bases, and automation workflows.

[justinbarrett.com](https://justinbarrett.com) | [justin@justinbarrett.com](mailto:justin@justinbarrett.com)