

The PKM tool decision map

Choose the information model
before comparing apps.

Personal knowledge management, made practical



Five ways to organise notes · Four worked decisions · One practical trial

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The question before the app

Personal knowledge management (PKM) tools are easier to compare once you know what you need to do with your information. Two apps may both store notes but handle ownership, collaboration, structure and retrieval differently. Before comparing features, describe the work you need to do regularly.

Write that need in a sentence: "We need one place where several people can update shared information," or "I need a personal archive I can reorganise and keep for years." Then identify a problem you cannot accept, such as losing access, a broken export, an abandoned review routine or too much work keeping notes organised.

The next page describes five ways to organise and use information. They overlap: one app may support several approaches, and you may need two systems for different tasks. Choose an approach to try first, then check whether it handles your most important requirement.

A useful decision order

- 01 Write down what you need to do regularly, not just a list of features.
- 02 Choose the approach that best matches that work.
- 03 Test the requirement that would make you rule out an app if it failed.
- 04 Compare suitable apps using a small sample of your own notes or project material.

Do not confuse storage with outcome

A tidy archive does not automatically help a team understand a decision or help you remember what you learned. Decide whether your main need is shared work, control of your files, connections between ideas, structured records or regular review. This is more useful than counting features.

Ask a more useful question

- 01 Instead of "Which app is best?", ask what must become easier each week.
- 02 Instead of "Which has the most features?", ask what problem would make you stop using it.
- 03 Check both the import and what an export preserves if you later leave the app.

Five approaches and what to check

Each approach below suits a different need. Use the questions to plan a small trial before moving a large archive or inviting a team. They are checks to make, not claims that every app in a category has the same limitation.

01 Workspace documents and databases

Useful for: keeping shared documents, references and structured project information together. What to check: can the right people edit the right material, and can the team export useful content if its needs change?

02 Local-first notes and files

Useful for: keeping a personal archive with control over files, storage and backups. What to check: if your device is lost or replaced, can you restore your notes, links and the structure you rely on?

03 Outlines and linked blocks

Useful for: capturing short ideas and connecting them through links and references. What to check: can you follow a line of thinking later, and what survives when you export a connected set of blocks?

04 Structured knowledge objects

Useful for: creating linked records for people, sources and ideas, with their own fields and relationships. What to check: are these records easier to find and use than ordinary notes, and does an export preserve the context you need?

05 Study and memory systems

Useful for: reviewing important material through active recall, not just storing it. What to check: can you keep up the review routine, and can you move your cards or notes if you later switch apps?

Four worked decisions

These examples show how different needs lead to different approaches. They are illustrations, not reports of our product testing.

A shared editorial hub

Three contributors need to find the current brief, source notes and article status. Shared documents with suitable permissions are a sensible starting point. During a trial, give each person the access they need, update one shared item and export a small project. A personal note archive may still help an individual writer, but it should not quietly become the team's only record.

A research archive that must outlast one project

A researcher collects source notes and drafts across several years. They need dependable storage, backups and room to reorganise. Local-first notes are worth trying. If many notes concern the same people, sources or concepts, try structured records too. Use the same connected group of notes in both approaches: add it, find it by a different route and export it. Inspect the exported links rather than assuming that an export button guarantees portability.

Material that must be remembered

A learner can collect useful notes and still struggle to recall them. If remembering is the main goal, try a study and memory system. Make a small set of prompts from real material and complete several review sessions. More features will not fix a routine that takes too much effort. Keep source material in a separate archive if you also need it for long-term reference.

A personal system beside a team system

Someone may think and draft in personal notes while their team needs a shared record of decisions. The two systems can serve different purposes. Test how a finished decision moves into the team workspace: does it arrive with enough context, a clear owner and an accessible source? If that transfer is awkward or depends on one person, switching the personal note app alone will not solve the team's problem.

A small trial that reveals the real trade-off

Use a small sample of your own non-sensitive material. A polished demo may show only an ideal example. Your trial should also cover finding information later, recovering it and taking it out of the app. Do not move an entire archive until both the everyday work and your essential checks succeed.

01 Capture a representative item

Choose something like the material you handle each day: a source note, a project decision, a connected idea or a study prompt. Add it as you normally would, rather than preparing a perfect example.

02 Return to it by a different route

Find the item without repeating the exact steps you used to create it. Try the search, links, filters, fields or review queue you would actually use. Check whether you can still understand the item and its connections.

03 Test sharing, recovery or review

For shared work, try the permissions and pass an item to another person. For local files, check sync, backup and restoration. For learning, complete a real review session. Focus on the part that would cause the biggest problem if it failed.

04 Export a small but connected sample

Export several related items, not just one plain-text note. Open the result outside the original app. Check that the text, attachments, links, fields and context your work depends on are still useful.

05 Check the effort to keep it useful

Could you keep up the capture, organisation and review routine after the initial enthusiasm fades? Write down one task that became easier and one recurring burden. An impressive first hour does not tell you how much upkeep an app will need.

Your decision worksheet

Fill this in before choosing an app. "Pass", "concern" and "fail" describe what you observed, not a numerical score. A failure on an essential requirement can outweigh several attractive features.

What I need to do regularly:

People who must use or access the information:

The problem I most need to avoid:

Approach to try first; another option:

A small sample of my own material to use:

Test	Candidate A	Candidate B
Add a real item		
Find it later		
Share or recover it		
Export connected items		
Keep up the routine		

Decision in one sentence: "I will use ____ for ____ because ____; I will revisit this if ____."

Use the map, then narrow the choice

This guide compares five ways to organise and use information. It is not a ranking, a complete list of apps or a guarantee about their current features. The approaches overlap. Product features and export options can change, so check official documentation and try the functions your decision depends on.

The full PickTheTool map explains the approaches and gives examples of tools:

<https://pickthetool.com/pkm-tool-decision-map/>. If your shortlist is Notion, Obsidian, Logseq OG and Roam Research, use the note-taking or thinking-tools picker to compare those four. The pickers do not cover every tool in the map or the separate Logseq database app.

For team work, check who controls shared information and how it passes between people. For a personal archive, test backup and export. For learning, try the review routine. Choose a trade-off you have checked and can realistically live with.

Before moving a real archive

Keep an untouched copy of the original material and record how to restore it. Move a small connected sample first, including text, attachments, links and useful fields. Open the exported or migrated sample outside the source app and compare it with the original. A successful import message does not prove that you can still find everything or that relationships and permissions survived. If an essential requirement fails, stop before making the new system your only copy.

When two approaches both fit

Decide whether the work needs one shared record or a reliable way to pass information between two systems. A personal research archive can coexist with a team workspace, just as reference notes can sit beside a separate study routine. Agree which copy is authoritative and how updates move between systems. Do not force everything into one app just to reduce the number of apps.

Source boundary: based on the PickTheTool PKM tool decision map website version reviewed on 27 August 2026. This guide was originally published in September 2026; its wording was revised on 21 October 2026. The examples and suggested trials are illustrations, not reports of first-hand product testing. Inclusion in an approach is not a product endorsement or affiliate recommendation.

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