

## Appendix A – Opportunity Assessment Survey

A sample questionnaire for the KCS Assessment

Organization: \_\_\_\_\_

- 1) Number of Support Analysts? \_\_\_\_\_ (worldwide audience for Knowledge sharing/KCS)
- 2) Geographies – how many support centers? \_\_\_\_\_ (centers with more than 6 people)
  - a) Locations and number of people in each?


- 3) Company employees vs. partner employees (outsourced)
  - a) # of company Support Analysts \_\_\_\_\_ # of outsourced Analysts \_\_\_\_\_
  - b) Number of partner/outsourcing partners \_\_\_\_\_
- 4) Products – how many product families or domains are supported? Most support organizations support a wide variety of products and organize them into groups or families, which in turn have a certain number of Support Analysts associated with supporting a product family.


- 5) Support structure
- a) How many levels of support do you have? \_\_\_\_\_ (how many escalations happen between the customer's first point of technical contact and development?)
- 6) People and product groups (see the KCS Adoption Planning Matrix worksheet under Adoption Strategy and Road Map in the *Adoption Guide*.)
- 7) Workload
- a) Number of incidents/cases closed per month \_\_\_\_\_
  - b) % from customers \_\_\_\_\_ % internal \_\_\_\_\_ (if applicable)
  - c) For internal help desk, average incidents/user/month \_\_\_\_\_
  - d) Channels of incident/case submission by customers (the total of i-v below should be 100%)
    - i) % via web submit \_\_\_\_\_ (click to create/submit an incident)
    - ii) % via chat \_\_\_\_\_
    - iii) % via email \_\_\_\_\_
    - iv) % via phone call \_\_\_\_\_
    - v) % other \_\_\_\_\_ (please describe, ie system generated)
  - e) Utilization rate? \_\_\_\_\_ (% of time Support Analysts are working on the queues – usually in the neighborhood of 50-65%)
- 8) Current tools
- a) CRM/case management system(s) \_\_\_\_\_
  - b) Knowledge management system(s) \_\_\_\_\_
  - c) Other key tools the Support Analysts use \_\_\_\_\_
- 9) Problem solving methodology
- a) Training on problem solving? \_\_\_\_\_ (e.g. Kepner-Tregoe)
  - b) How is collaboration enabled? \_\_\_\_\_ (wikis, blogs, IM, email, phone, face to face, webex)
  - c) Technical mentoring program? \_\_\_\_\_ (formal, informal, none)

10) Content development process

- a) Is there a knowledge management process in place? \_\_\_\_\_
- b) Is there a knowledge base? \_\_\_\_\_
- c) What are the criteria for what gets put into the KB? \_\_\_\_\_  
\_\_\_\_\_
- d) How and when is content for the KB created \_\_\_\_\_  
\_\_\_\_\_
- e) Is there a life cycle defined for the knowledge articles? \_\_\_\_\_ (yes, no) Life cycle states \_\_\_\_\_
- f) Do the users of the content have a way to give feedback to the creators of the content? \_\_\_\_\_
- g) How is the content in the KB kept up-to-date? \_\_\_\_\_

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h) What measurements are in place to assess:

- i) The usefulness of the content \_\_\_\_\_
- ii) The completeness of the content (% of what is known Vs what gets published?)  
\_\_\_\_\_
- iii) The timeliness of the content (time to publish) \_\_\_\_\_

11) Customer self-service model?

a) Briefly describe the kinds of self-service delivery are used:

- i) Integrated into the application user interface \_\_\_\_\_  
\_\_\_\_\_

- ii) Automation (detect, report, repair) \_\_\_\_\_  
\_\_\_\_\_

- iii) Support portal or Web based self-service

(1) Customer's sign in to use the web self-help \_\_\_\_\_ (yes/no)

(2) Types of self-help offered? (FAQs, search KB, online docs)  
\_\_\_\_\_  
\_\_\_\_\_



(3) % of customers who use the web before opening an incident? \_\_\_\_\_

(4) % of time the customers find what they need on the web? \_\_\_\_\_

12) Organizational goals – what are the key initiatives for the company this year?

a) \_\_\_\_\_

b) \_\_\_\_\_

c) \_\_\_\_\_

13) What is your long term vision for Support?

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14) How is support viewed by other departments within your company? (ex. Very well integrated, it is the voice of the customer, or not integrated with sales but integrated well within development).

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15) Describe any major changes or initiatives that have occurred within support during the past three years and any impact on employee or customer satisfaction.

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16) What role does support play in contributing to the key company initiatives?

a) \_\_\_\_\_

b) \_\_\_\_\_

c) \_\_\_\_\_

17) Organizational measures - what are the executive level metrics used for the service organization?

- a) \_\_\_\_\_
- b) \_\_\_\_\_
- c) \_\_\_\_\_
- d) \_\_\_\_\_
- e) \_\_\_\_\_

18) Performance assessment – how is the Support Analyst contribution measured?

- a) \_\_\_\_\_
- b) \_\_\_\_\_
- c) \_\_\_\_\_

19) Teamwork – how is teamwork encourage and assessed?

- a) \_\_\_\_\_
- b) \_\_\_\_\_
- c) \_\_\_\_\_

20) Support Analyst rewards and recognition – what programs are in place?

- a) \_\_\_\_\_
- b) \_\_\_\_\_
- c) \_\_\_\_\_

21) Teams based rewards and recognition – what programs are in place?

- a) \_\_\_\_\_
- b) \_\_\_\_\_
- c) \_\_\_\_\_

22) Management communications:

- a) Methods?
  - i) \_\_\_\_\_
  - ii) \_\_\_\_\_
  - iii) \_\_\_\_\_
- b) Effectiveness- is there a measure for the effectiveness of communications?
  - i) Do people understand the goals and objectives of the support organization?

ii) Do people understand how they are measured and why?

23) Observations about the culture:

- a) Is it combative/competitive or collaborative?
- b) Is the leadership model focused on command and control or alignment? Providing task level direction vs influence? (employee engagement, participation and enablement)
- c) To what extent is there trust between Support Analysts?
- d) To what extent do the Support Analysts trust and respect their managers?
- e) To what extent do the managers trust and respect the Support Analysts?
- f) Do people deal with contention and conflict or it is avoided/ignored?
- g) If people deal with contention/conflict is it in a constructive way?
- h) To what extent are people willing to make commitments and be accountable?