



KCSSM Verified
Self-Assessment

Consortium for Service Innovation

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KCS Version 3.01				
KCS Practice	Activity/capability	Functional requirement	Assessment <ul style="list-style-type: none"> • OB = Out of box functionality • C = Configurable • IR = Integration required • SF = Separate feature (separate price) 	
1. Workflow - Process				
a. Solve Loop	Capture in the workflow	As the problem is being solved information can be captured in the customer context and does not have to be re-typed to create a solution		
	Structure for reuse	Information can be captured in the workflow in a format or template that identifies the context or role of the content. (example for technical environments: the problem/question content is distinct from the environment content)		
	Searching is creating	Words and phrases that are used to search the KB are captured as potential content for a new solution or to update existing solution		
	JIT solution quality (flag it or fix it)		Ability for licensed users to update, modify content in the moment of use	
			Ability for all users (internal and external) to indicate use of a solution and to flag solutions that are not clear or are felt to be inaccurate	
			Ability for all users to add comments or feedback on solutions	
b. Structured Problem Solving	Search early search often	Ability to search the KB as information about the problem or question is being collected		
c. Search	Deliver relevant content to the user	Ability to search the knowledge base. [vendors should be able to demonstrate the delivery of relevant solutions in response to user searches]		
d. Solution Query	View solutions that meet specific criteria and or combinations of criteria	Ability to query the knowledge base for solutions based on multiple criteria. (for example – date created/modified, solution state, user, product, department...) Ability to identify emerging value solutions (based on reuse)		
e. Integration Considerations	Capture the solution as provided to the customer as part of the incident	Snap shot of solution become part of the incident		
	Many to many relationship between incidents and solutions	Forward and backward pointers between incidents and solutions		

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2. Content			
a. Structure	Context for content through a simple structure, format or template	Ability to distinguish: <ul style="list-style-type: none"> • Problem/question • Environment information • Fix/answer • Cause • Comments and notes (feedback from users) 	
	Readability and formatting	Support “complete thought not complete sentences” concept and multiple phrases for each area of content. Content formatting; bulleted lists, numbered lists	
	Linking to external/other information	Enable content to contain hyperlinks to other sources of content	
b. Meta Data	Automatically capture events and activity history for solutions	Record: <ul style="list-style-type: none"> • Date created • Last modified • State changes • Number of times used 	
c. Solution States	Support the solution life cycle	Provide capability for a minimum of 4 solution states: <ul style="list-style-type: none"> • Work in progress • Draft • Approved • Published 	
	Support exception processes for	Ability to identify a solution (could be a state change or other facility) that needs special attention; rework, technical review and compliance review. Enable workflow or notification rules for exception processes	
d. Solution Classes and Attributes	User configurable solution classes and attributes	Enable classification of solutions by; product, level of support, type (usage, defect)	
e. Visibility Management	Not everyone gets to see everything	Provide visibility management options that uses user role and class, from user profiles, along with solution state or other solution attributes) to determine visibility	

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3. Performance Assessment			
a. Reporting	Trends for leading indicators	Provide data for activity trends by individual and by group(s) for; create, modify, reuse, data can be exported in standard formats	
	Report on outcomes	Provide data to support individual and team reporting; citations (reuse of solutions by others), feedback, web based reuse metrics	
	Solution value and patterns	Frequency distribution for solutions; reused, modified, by state. Report on solutions by state and timing of state changes	
	Two dimensional group/team definitions	Ability to provide data by organizational structure as well as by virtual teams	
b. Licensing Model	User profiles/classes have defined functional rights and privileges in the system	Ability to manage system rights and privileges for modification and state changes based on a combination of the user's profile and the state of the solution	
c. User Profiles	Identify users	Name, time zone, language	
	KCS role(s)	KCS roles define rights and privileges in the system	
	Contact information	Email, phone #, physical location	
	Organizational role(s)	Organizational roles define rights and privileges	