TSIA's 2017 Knowledge Management Survey

Demographic Information

1. Which of the following is your company's primary industry? If you have multiple industries, please select the one that generates the most revenue for your firm.
( ) Enterprise Hardware
( ) Enterprise Software
( ) Consumer Hardware/Devices
( ) Consumer Software
( ) Healthcare/Medical Devices
( ) Telecommunications
( ) Financial Services
( ) Industrial Equipment and Technology
( ) Retail
( ) Travel & Hospitality
( ) Public Sector/Government

2. What was your company's annual revenue, in US Dollars, for the most recent fiscal year?
( ) Less than $100 million
( ) $100 million - $499,999 million
( ) $500 million - $999,999 million
( ) $1 billion - $10 billion
( ) More than $10 billion

3. TSIA services multiple service audiences. Which of the following do you consider your "home" department?
( ) Customer Support/Technical Support
( ) Customer Success
( ) Field Service
( ) Professional Services
( ) Managed Services
( ) Education Services
( ) Service Revenue Generation
( ) Expand Selling

4. In which region are you located?
( ) North America
( ) Central and South America
( ) Europe/Middle East (EMEA)
( ) Asia Pacific

Knowledge Management Basics

5. In your opinion, if your organization was sharing knowledge as well as they possibly could, it would improve the productivity of your team by:
( ) 0% to 5%
( ) 5% to 10%
( ) 10% to 20%
( ) 20% to 30%
( ) 30% to 40%
( ) 40% to 50%
( ) More than 50%

6. Of the time your support employee spend working on customer issues, what is your estimate of how that time is spread across each of these activities? Please enter the percentage of time spent for each. All entries must add up to 100%.
_____Discovery/problem identification
_____Researching problem
_____Collaboration with other employees/experts
_____Applying resolution/fixing problem
_____Documenting case in CRM/Incident Management tool

7. How would you rate your company's culture regarding knowledge sharing?
1 _____[__]_____ 10

8. What is your company's approach to enterprise collaboration? Enterprise collaboration is a set of social tools and processes allowing employees to easily communicate new information or ask questions to a group, allowing real-time conversations with teams or experts in any location.
( ) We have an enterprise-wide collaboration platform (i.e., Jive, Telligent, Salesforce Chatter)
( ) Individual departments have collaboration tools, but we don't have an enterprise-wide tool
( ) We rely on traditional communication methods, such as phone and email, to collaborate
( ) Collaboration really isn't part of our departmental and/or corporate culture

9. How familiar is your organization with Knowledge Centered Support (KCS)?
( ) What is KCS?
( ) Some training, little adherence
( ) We follow the basics
( ) KCS trained, not 100% compliant
( ) KCS compliant in every way

10. Though in the perfect world, companies would use a single knowledge repository for both customer-facing and employee-facing knowledgebases, this is often not the case. Please indicate your approach:
( ) Totally separate repositories and management teams
( ) Same technology is in use, but we use separate instances and management teams for each
( ) Same technology is in use, management and some content is shared, but there is also unique content for each audience
( ) Single knowledgebase repository and management team

11. How do you capture new "best practice" content and "lessons learned" at the end of each customer project or engagement? This would apply to professional services, managed services, and/or education services.
( ) We don't capture new best practices or lessons learned today
( ) We encourage employees to submit information to a content management system, but it isn't monitored or required
( ) We have a formal project review meeting and capture content for the content management system at the end of the engagement

12. How often is your knowledge management content updated to edit or remove unused or outdated content?
( ) This is done regularly as part of our normal KM activities
( ) Content expires / must be reviewed after some fixed period of time
( ) Content is archived if it hasn't been used, or hasn't been used much, in a fixed period of time
( ) We review and update solutions when we ship a new release
( ) We have not updated our content for a very long time

13. Have you started creating videos as part of your knowledge management process?
(Select all that apply)
[ ] We create screen capture videos (e.g., using Camtasia) to accompany applicable knowledgebase articles
[ ] We have a few videos available, but they aren't regularly part of the knowledge publishing process
[ ] We have a library of "how to" videos on our website
[ ] We have a dedicated YouTube site for "how to" videos
[ ] Currently we are not creating videos as part of our knowledge management program

14. How do you identify gaps or missing content in your knowledgebase?
(Select all that apply)
[ ] We currently do not have a process or tools for proactively identifying content gaps
[ ] We identify content gaps from employee feedback
[ ] We identify content gaps from customer feedback
[ ] We find knowledge gaps from a report analyzing search strings with few or no results
[ ] We leverage an analytics tool to identify missing content at the concept level

15. How do you involve external customers in the knowledge creation process?
(Select all that apply)
[ ] Currently we do not involve customers in knowledge creation
[ ] Customers can submit new knowledge content online
[ ] We harvest useful customer content on discussion forums for the knowledgebase
[ ] We offer a customer "tribal knowledgebase" as part of our community
[ ] Customers can indicate 'like' or 'thumbs up' on content they like
[ ] Customer can submit comments or edits to knowledgebase content
[ ] Our customer communities/forums are part of our unified index, so all contributions may be used as knowledge, providing others find the content helpful as identified by usage analytics

Employee and Customer Facing Knowledge

This section of the survey applies to the knowledgebase tool or tools, i.e., the tool your support and field technicians use to search for the answer to customer problems, and the tool your customers use for self-service.

16. Does your organization rely on a single knowledgebase, or do you rely on your "ecosystem" of knowledge in multiple systems and repositories?
( ) We consolidate everything into a single knowledgebase
( ) We have an ecosystem of knowledge in multiple systems and repositories
( ) Both
( ) Neither

16A. How does your organization leverage its IT ecosystem for knowledge management?
( ) We spend a lot of time searching!
( ) We integrate 2 to 3 systems
( ) We use a unified index of multiple systems to connect information and surface it through intelligent search
( ) We use a unified index of multiple systems along with usage analytics and machine learning to identify and suggest the best content for each user, based on context
( ) We use the unified index, intelligent search, usage analytics and machine learning to recommend the best content for both employees and customers, based on context

17. Have you made updates to your knowledge management system to enable access by mobile devices?

	No, we have yet to make specific updates for mobile access	We have recoded our site in HTML5 and/or Responsive Web	We have created a mobile version of our site	We have created self-service apps for specific devices
Employee Facing Knowledgebase	( )	( )	( )	( )
Customer Facing Knowledgebase	( )	( )	( )	( )

18. When users search the knowledgebase, do search results include relevant content from your online community/discussion forums, online documentation, manuals, case history, or other content sources, i.e., federated or unified search?
(Select all that apply)

	Knowledgebase searches only search content in the knowledgebase	Yes, we offer our employees federated search. Federated search uses whatever search engine is available for each content repository, and "federates" the results of each into a single view	Yes, we offer our employees unified search. Unified search indexes all content sources and returns search matches, along with filtering options for the content	Yes, we offer our employees unified, intelligent search that uses analytics and machine learning to automatically recommend and predict the most relevant content for their individual context	We are considering investing in a federated, unified or intelligent search tool in 2017-2018
Employee Facing Knowledgebase	( )	( )	( )	( )	( )
Customer Facing Knowledgebase	( )	( )	( )	( )	( )

19. To your knowledge, how many different knowledge management solutions has your company used over the years?

	Our current solution is the only KM solution we've ever had	This is our 2nd KM solution	This is our 3rd KM solution	This is our 4th KM solution	We've had 5 or more KM solutions
Employee Facing Knowledgebase	( )	( )	( )	( )	( )
Customer Facing Knowledgebase	( )	( )	( )	( )	( )

20. How do your customers gain access to your self-service knowledge content, articles, solutions etc.?
( ) Secure login/maintenance contract required
( ) Registration required, no maintenance contract required
( ) Some content is open to public, no registration required
( ) Open to public, no registration required

21. Is your self-service content, i.e., knowledgebase articles and community/forum conversations, indexed by Google so customers searching the Internet see your content listed in results?

	Yes, content is indexed by Google and appears in search results, but registration/login is required to access the content	Yes, content is indexed by Google, appears in search results, and customers can click the item to read the content	We do not currently allow Google to index our self-service content
Self-Service Knowledgebase	( )	( )	( )
Customer Community/Discussion Forum	( )	( )	( )

22. Which of the following do you offer on your self-service site to assist customers?
(Select all that apply)
[ ] Search Box
[ ] List of FAQs
[ ] Decision Tree/Index
[ ] Virtual Assistant/Guided Search
[ ] Real time suggestions when typing in the description of a new support case

23. Which of the following types of content do you offer on your self-service site?
(Select all that apply)
[ ] Knowledgebase Articles
[ ] Product Documentation
[ ] Video Library
[ ] Patches/Bug Fixes
[ ] Software Updates/New Versions
[ ] Newsletters
[ ] Blogs
[ ] Community/Forums
[ ] Learning Management System/Tutorials

24. What upsell/cross-sell elements have you incorporated into your customer self-service site?
(Select all that apply)
[ ] We have generic offers for products/services listed
[ ] We have personalized offers for products/services listed
[ ] We include upsell/cross-sell offers in some knowledge articles
[ ] We have a chat bot/virtual assistant that extends offers as appropriate
[ ] We do not provide any upsell/cross-sell offers for customers on our self-service site

25. What knowledge or self-help options are embedded in your technology to allow customers to self-assist without leaving the application?
(Select all that apply)
[ ] Basic field definitions or instructions
[ ] Search product documentation
[ ] Search self-service or other external content
[ ] Virtual Assistant/Guided Search
[ ] We have no help embedded in our technology today

26. How would you rate your existing knowledge management implementation?
1 _____[__]_____ 10

Customer Facing Knowledgebase:
1 _____[__]_____ 10

27. How would you rate your existing community/discussion forum implementation?
1 _____[__]_____ 10

Customer Facing Community:
1 _____[__]_____ 10

Knowledge Management Staff/Knowledge Workers

28. What approach do you use to staff your knowledge management program?
( ) Everyone is accountable
( ) We have designated knowledge workers who author and edit content
( ) Combination of everyone is accountable with a mixture of dedicated staff
( ) Team leads have ownership for knowledge on their products/projects

29. What approach do you use to managing your knowledge management program?
( ) We have a dedicated program manager for knowledge
( ) We have a program management team that oversees/manages the knowledge program
( ) Managers oversee the program as part of their jobs, but there is no dedicated manager or team
( ) No one is designated owner/manager for our knowledge management program

30. How many hours are spent by employees to author, edit and maintain knowledge in a typical week?
Example: If one full time person is dedicated to knowledge, enter 40 hours. If three people are dedicated 20% to knowledge, enter 24 hours.
_____Hours per week

31. Do you tie knowledge management activity/outcomes to employee performance and/or incentive compensation?
(Select all that apply)
[ ] We currently do not link any incentive compensation or performance goals to knowledge management activity or outcomes
[ ] We include goals for KM activity (articles submitted, edited, searched, linked to incidents, etc.) in employee performance reviews
[ ] We include goals for KM outcomes (creating or editing highly rated content, most used content, etc.) in employee performance reviews
[ ] We offer bonus programs based on KM activity (articles submitted, edited, searched, linked to incidents, etc.)
[ ] We offer bonus programs based on KM outcomes (creating or editing highly rated content, most used content, etc.)

Knowledge Management Metrics

32. How many days on average does it take to publish a new KB article, i.e., the elapsed time from when the problem is submitted to article being published?
Please estimate the average number of days to publish in the field below.
_____Days

33. Are knowledge management metrics part of executive operational reviews?
( ) Yes, our executives are interested in usage/ROI metrics for our KM program during ops review meetings
( ) Our executives may periodically ask about the KM program/tools, but it is not a part of the regular ops review
( ) Our executives do not monitor usage/ROI metrics for our KM program