Week 1: Develop a Knowledge Transfer Program

Nate Bachmeier

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Northcentral University

# Develop a Knowledge Transfer Program

NCU-F is a large-scale enterprise with ten thousand employees working across several global financial services. The business requires policies and procedures that enable its staff and customers to raise support issues and discover standard solutions. Information Technology can serve those experiences using self-service portals into knowledge databases. When answers are not available, those same systems can escalate requests to product support networks.

## Tiered Support Networks

Without sufficient scalability, the support network becomes prohibitively expensive. One approach to meeting this requirement is through a two pyramid structure (Figure 1). The top inverted pyramid represents members of the product engineering role-family, versus the bottom, consists of the support role-family. Under this model, support tickets flow up and solutions down. There is a strong economic incentive to address issues at the bottom of the structure, as the higher levels require specialized resources.

Figure 1: Tiered-Support Network

Diagram

Description automatically generated

For example, a customer wants to integrate their business process with one of NCU-F’s web services. When customers can quickly discover that information from a blog or wiki, the business must only pay content hosting fees. Otherwise, the request escalates to support staff which must first route the ticket to the least costly junior technicians. After the junior fails to address the issue, they can escalate it to a more experienced peer for review. If the support team requires further assistance, there must be communication channels for escalating to program management.

The support PM must then contact the area owner PM on the relevant engineering team. For instance, this specific customer wants to ingest market data from the Trading Platform. In this case, the Trading PM will ask the Engineering Manager for a solution. Unless the manager can resolve the matter, it must escalate to a service engineer. The engineers must halt inflight work and context switch, introducing risks to existing timelines and commitments.

Ideally, that person can search for a blog or wiki article that documents the procedure. When this step fails, the request must escalate to humans.

The business must be cognizant of routing these issues to the least expensive resource first (e.g., junior versus senior technician). Suppose that the senior staff cannot address the concern, then they require communication channels for engaging program managers. PMs