

The Early-Team Playbook

Seven plays to make in your first six months of KCS® practice

Program playbook · For team leads, Knowledge Domain Experts, and knowledge program management · Nick Morgan

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The premise.

The first-cohort teams built their KCS® practice by crashing and burning their way to what works. They paid the tax that turned the methodology from concept into discipline. They:

- Sampled cases without templates
- Scored articles without taxonomy
- Coached practitioners without coach training
- Ran Process Alignment Review cycles before there was a workbook to run them in

Newer teams should not have to pay that tax again.

This is the KCS® approach turned on KCS® practice itself: capture the practice once, reuse it many times, adapt it to context.

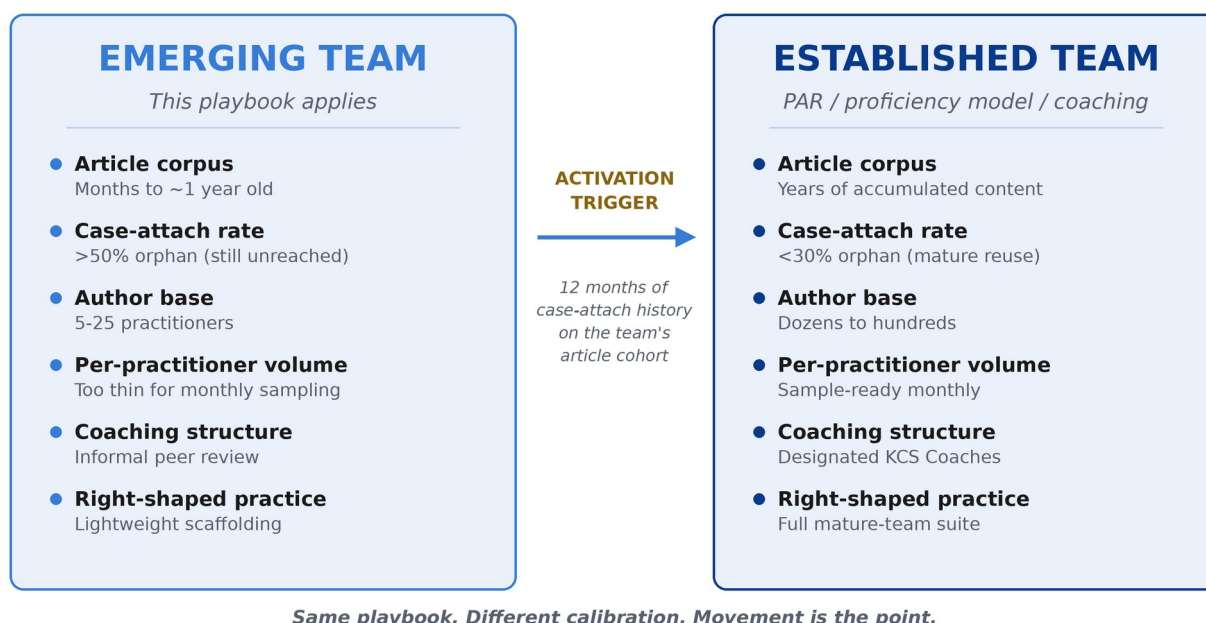
The hard work of figuring out what works at scale is done. What new teams need is a different question — not “how do we invent KCS® practice,” but “how do we adopt the version that already exists in a way that fits where we actually are.”

Who this is for. Any customer technical support team in early KCS® maturity: a young corpus, a small author base, no Process Alignment Review history. Tomorrow it is the next emerging product line; today it is whichever team you are standing this up with.

The playbook below is the same in each case — the data calibration changes, the plays do not.

I. Where you are — a 30-second self-assessment

If your team matches the emerging-team profile below — a young corpus, a small author base, too little per-practitioner volume for monthly sampling — this playbook is for you. If it matches the established-team profile instead, you have graduated, and the mature-team practice applies: Process Alignment Review cycles, the KCS® proficiency model, and a formal coaching structure.



■ Maturity is per-team, not per-program. ■

Applying late-stage practice to an early-stage team is not rigour — it is process-as-theatre, and the team will correctly recognise it as such. Stage-matched practice respects the data and builds trust in the program.

A note on the names. Process Alignment Review (PAR) is the KCS® 2027 name for what v6



called the Process Adherence Review. The proficiency model – KCS® Candidate, Contributor, Publisher, Coach – is the 2027 name for what v6 called the licensing model; the Consortium renamed it to avoid confusion with software licences. This document uses the current names throughout.



II. The playbook — seven plays for your first six months

Each play below stands on its own. Run them concurrently — none of them blocks any other from starting. The numbering is for reference, not sequence.

THE PLAYBOOK

Seven plays to run in your first six months



1

PLAY

TOOLING

Stand up the dashboard

Your team's working tool. Not a leadership reporting artifact.



2

PLAY

CADENCE

Monthly "what landed?" stand-up

30 minutes, dashboard open live, two questions, no slides.



3

PLAY

ROLE

Designate a KDE, informally

Light role, named openly. No second tier beneath it yet.



4

PLAY

STANDARDS

Publish a content supplement

One page tuned to your domain, on top of the enterprise standard.



5

PLAY

MOTIVATION

Build a recognition loop

Surface what landed and name the author. Not a scoring loop.



6

PLAY

CADENCE

Make refresh a cadence event

The monthly cycle keeps the tool living, not static.



7

PLAY

GRADUATION

Communicate the trigger openly

PAR activates when the corpus reaches the adoption threshold.



Run all seven concurrently.

No play blocks another from running.

1. Stand up a team-specific dashboard before doing anything else

What it is. A self-contained, monthly-refresh dashboard scoped to your team's product knowledge base. Not a leadership reporting artifact — a working tool for the team.

- Overview with corpus shape
- Top issues by recorded article use
- Emerging issues (articles climbing in the last 90–120 days)
- Components and subsystems
- Customer-journey stages

Why this is play #1. It changes the conversation from “what scores are we measuring you on” to “here is the data; what do you make of it.” That reframing is what makes everything else in this playbook land.

2. Run a monthly “what landed?” stand-up — 30 minutes, no slides

Who. The engineering manager plus two or three senior practitioners, dashboard open live.

Two questions. What is appearing in the emerging view? What surprised us?

What it is not. No KPIs, no rollup to leadership, no slide deck. This is the lightweight equivalent of Knowledge Domain Analysis for teams not yet at formal-KDA scale — it builds the muscle of looking at signal regularly without imposing the formal-KDA overhead.

Why monthly, not quarterly. For a young knowledge base the data shifts fast enough that a quarterly cadence misses most of what is happening. Monthly costs six hours a year and catches signal you would otherwise miss.

3. Designate one Knowledge Domain Expert — informally

What it is. Identify the person who is already the de-facto domain authority — usually the practitioner with the highest article count or the highest article-use ratio. Make the role explicit, light on accountability, mostly the named person for “where does this knowledge belong?” and “is this article shaped right?” questions.

Watch out for. Do not establish a second, formally-defined domain-support tier beneath the KDE yet — that emerges from volume the team does not have, and layering it prematurely creates titles without function.

4. Publish a one-page domain-specific content supplement

What it is. The enterprise content standard applies as the base for every team. The supplement is a single additive page on top of it — not a rewrite.

- Title patterns that are findable for your specific customer audience
- When to author a hub article versus a leaf article
- How to handle backend- or platform-specific symptoms in titles
- Any vocabulary conventions unique to your domain

Why this matters even in month one. Title-pattern problems compound over time. A young knowledge base's most-used article is often a generic title that snared traffic by accident — exactly the kind of early-corpus problem the supplement is designed to prevent. Fix it before the team has two thousand articles, not after.

5. Build a recognition loop, not a scoring loop

What it is. When an article climbs into the emerging-issues view, surface it in a team channel or weekly digest with the author named. Low effort, high signal.

The inverse of PAR. Process Alignment Review measures whether practitioners handled existing knowledge well; recognition measures whether the knowledge they wrote landed. For a team in this phase the latter is the right reinforcement mechanism, because the former is barely formed.

6. Treat the dashboard's monthly refresh as a content event

The cycle. Each month: pull fresh data, push the updated dashboard, briefly note in the team channel what climbed and what is new.

Why this works. The cadence keeps the tool feeling living rather than static, builds the habit of looking at signal, and gives the team an artifact to point to when leadership asks how things are



going — without forcing leadership to read practitioner-level detail.

7. Communicate the activation trigger for mature-team practice — openly

What it is. Tell the team explicitly when you will move from this playbook to the mature-team practice: Process Alignment Review cycles, proficiency-model progression, formal coaching.

The trigger. Data-driven, not calendar-driven: the team's article cohort reaches at least 80% adoption — the share of articles with any recorded use. For most emerging teams that takes 9–18 months from the playbook starting, depending on team velocity and product visibility. This threshold is the author's own operational measure; it is not a KCS® measure, and the Consortium sets no numeric target for it.

Why openly. Naming the trigger signals respect for the team's current stage — no premature judgment — and creates a concrete forward expectation they can plan against. It also defuses the natural anxiety that comes with “you are not in PAR yet”: the team knows when and why they will be.

III. What to leave on the bench

Things to specifically avoid imposing on an emerging team. Each one looks reasonable in isolation, and each one would damage the program if applied prematurely.

ON THE BENCH

Five mature-team plays that don't belong in this game yet

×

BENCH

EVALUATION

Formal PAR cycles

Sampling on early-stage data measures noise. The team will recognise the metrics as illegitimate.

×

BENCH

METRIC

Reuse Accuracy scoring

The denominator - articles being reused - is barely formed. Scoring it produces statistical noise.

×

BENCH

PROFICIENCY

Proficiency-model progression

Built for per-practitioner volume an emerging team doesn't have. Activates alongside PAR, not before.

×

BENCH

STRUCTURE

Formal coaching structure

Coaching emerges from case volume. Informal review works at this scale; titled coaches don't.

×

BENCH

COMPARISON

Cross-team metric comparison

Apples-to-oranges against the established portfolio. Hold off until your team has graduated.

***Better to say
"not yet" cleanly***

*than dilute the model
with watered-down variants.*

BENCH · v. 2

- **Formal Process Alignment Review cycles.** PAR assumes a per-practitioner monthly case sample, a mature article corpus to reuse from, and a coach-to-practitioner relationship graph.



Emerging teams have none of these. PAR sampling on early-stage data measures noise, and the team will correctly recognise that the metrics are illegitimate. Avoid “PAR-lite” and modified PAR variants too — better to say “not yet” cleanly than to dilute the model with a watered-down version.

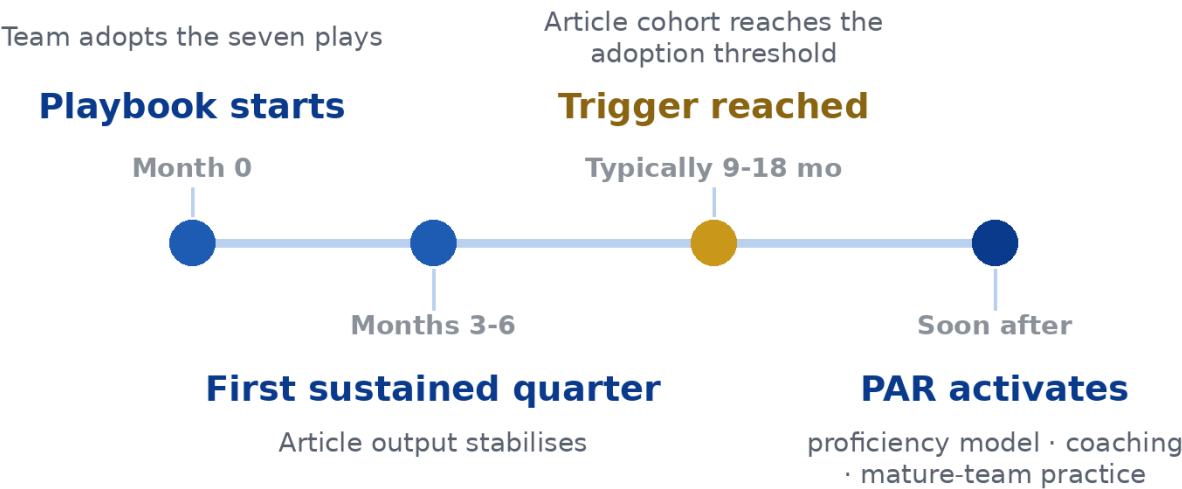
- **Reuse Accuracy scoring.** Same issue: the denominator — articles being reused — is barely formed for an emerging team. Scoring against it produces statistical noise dressed up as a metric.
- **Proficiency-model progression.** The KCS® proficiency model — Candidate, Contributor, Publisher, Coach — is built for per-practitioner volume that emerging teams do not have. Assigning levels across a 5–25 person team where most are writing their first articles is overhead without payoff. The proficiency model activates alongside PAR: same trigger, same timeline.
- **Formal coaching structure.** Coaching as a defined role emerges from case volume — there has to be enough handling to coach against. An informal “senior reviews newer” practice works at this scale; titled coaches do not.
- **Cross-team metric comparison against the established portfolio.** Comparing an emerging team's reuse rate, once it eventually has one, to an established team's is apples-to-oranges — corpus age, case volume, and audience all differ. Hold off on cross-team comparison until the emerging team has graduated into the same maturity band.

IV. When you graduate — what changes

Once the activation trigger is met — when your team's article cohort reaches at least 80% adoption — the mature-team practice activates.

THE ACTIVATION TIMELINE

When does a team graduate from playbook to PAR



Data-driven, not calendar-driven.

The trigger fires when the corpus reaches the threshold - not on a fixed date.

Element	Emerging-team posture (this playbook)	Mature-team posture (graduation)
Primary feedback mechanism	Dashboard, monthly stand-up, recognition loop	Process Alignment Review cycles, monthly per-practitioner sample, formal coaching
Domain-expert structure	One informal Knowledge Domain Expert, no second tier	Designated KDE plus a role-defined domain-support tier
Coaching	Informal peer review	Designated KCS® Coaches with assigned practitioners; PAR-integrated coaching
Measures applied	Recorded article use, emerging-	Reuse Rate, Reuse Accuracy, Solve

	article rate, author recognition	Loop Index
KCS® proficiency model	Not applied	Practitioners progress Candidate → Contributor → Publisher → Coach
Cross-team rollup	Excluded from cross-team comparisons	Included in portfolio-wide rollups
Dashboard role	The team's primary working tool	Complement to PAR, not a replacement

The transition is not abrupt. The dashboard the team has been using through the emerging phase stays in place — it becomes the demand-side complement to PAR's handling-side view. The KDE role they have been doing informally becomes a formal program role. The monthly stand-up either continues, if it is working, or folds into the PAR review rhythm.

■ *Graduation is not an end-state. It is entry into a different phase of work.* ■

The mature-team practice is itself evolving. Graduation means joining that conversation, not finishing one.

V. Worked examples — two emerging teams in this posture

Two real applications of the playbook, anonymised and with corpus figures given as bands rather than counts. They are deliberately different in size and shape so the calibration point comes through.

WORKED EXAMPLES

Same playbook, calibrated to the data each team actually has

EXAMPLE A

Single-product team, young technical domain

SHAPE

A few hundred articles, low-teens author base, and total uses in the same order as the article count. Median article birth inside the most recent quarter. Highest orphan rate in its portfolio. Distinct domain vocabulary unlike neighbouring teams.

POSTURE

Full playbook applies. Designate one KDE; informal peer review; recognition loop on emerging articles. Domain content supplement still to be authored.

ACTIVATION TARGET

Roughly 18 months out - once the current article cohort has 12 months of case-attach history.

EXAMPLE B

SaaS product family with multiple sub-products

SHAPE

Under a thousand articles, an author base in the high double digits, and uses several times the article count. Four sub-products, one dominant member carrying the large majority of articles and use.

POSTURE

Full playbook applies, with one nuance - the larger author base means a second domain-support tier could emerge sooner, but probably still doesn't earn formal definition until the per-product corpora mature.

ACTIVATION TARGET

Same approximate window as Example A.

The plays are universal. The numbers are local.

Example A — single-product team in a young technical domain



Shape. A few hundred articles, a low-teens author base, and total recorded uses in the same order as the article count. Median article birth inside the most recent quarter. Highest orphan rate in its portfolio. Single-product knowledge base, with distinct domain vocabulary unlike neighbouring product teams.

Posture. Full playbook applies. Designate one KDE; informal peer review; recognition loop on emerging articles. Domain-specific content supplement still to be authored.

Activation target. Once the article cohort reaches at least 80% adoption — typically 12–18 months for a team at this size.

Example B — SaaS product family with multiple sub-products

Shape. Under a thousand articles, an author base in the high double digits, and recorded uses several times the article count. Four sub-products, with one dominant member of the family carrying the large majority of articles and use.

Posture. Full playbook applies, with one nuance — the larger author base means a second domain-support tier could emerge sooner than in a smaller team, but probably still does not earn formal definition until the per-product corpora mature.

Activation target. Same approximate window as Example A.

Both teams demonstrate the principle: same playbook, calibrated to the data each team actually has. The plays are universal; the numbers are local.

VI. Resources and where to start

- **Your dashboard.** Ask your knowledge program manager or your team's leadership to provide one. Standing up the dashboard, configuring the data extraction, and hosting it are program-level responsibilities — not work the team itself has to do. What the team does need to do is use it once it is there (play #1). If your organisation does not yet have a support-to-development dashboard pattern in place, that is the first conversation to have with program management before applying this playbook.
- **Your content supplement.** Your organisation's enterprise content standard is the base. Your one-page supplement should cover title conventions for your specific customer audience, when to author a hub versus a leaf article, how to handle backend or platform-specific symptoms in titles, and any vocabulary unique to your domain. The KDE writes it; knowledge program management reviews and signs off.
- **Activation trigger criteria.** The trigger is your article cohort reaching at least 80% adoption — the share of articles with any recorded use. Practically, that puts PAR activation 9–18 months after the playbook starts, depending on team velocity. Track the adoption rate on your dashboard; once it crosses the threshold reliably, you are ready.
- **The methodology itself.** The KCS® Practices Guide, the Principles and Core Concepts pages, the KCS® Coach Reference Guide and the KCS® Glossary are published free by the Consortium for Service Innovation at library.serviceinnovation.org. Read the source rather than a second-hand summary — including this one — wherever the two differ.
- **Where to go for help.** Your knowledge program manager owns the program-level scaffolding — dashboard, content standard, PAR cadence, proficiency model — and is the right escalation point when anything in this playbook needs interpretation against your team's specific data. If your organisation has no designated knowledge program manager, the role most likely holding this responsibility is your knowledge manager, support operations lead, or most senior KCS®-trained practitioner.

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What is the author's. The seven plays, the bench list, the activation trigger and its threshold, the emerging-versus-established comparison, the worked examples, all five figures, and every word of the text are the author's own work. The adoption-rate threshold in particular is an operational measure of the author's, not a KCS® measure.

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