

Outsourcing Knowledge Transfer Survey Template

All questions are optional. Follow each question's directions.
Write your answers to the open questions in the space provided.

Think about the named IT service transition and your direct experience during the past two weeks. Every question is optional. Do not enter passwords, system addresses, customer information, confidential incident details or individual colleagues' names.

1. Which side of this transition are you contributing from?

- ☐ Client team
- ☐ Service provider team
- ☐ Shared or joint team
- ☐ Another participating team
- ☐ Prefer not to say

2. How clear is the knowledge your team needs to receive before the next handoff checkpoint?

- ☐ Very unclear
- ☐ Somewhat unclear
- ☐ Neither clear nor unclear
- ☐ Somewhat clear
- ☐ Very clear
- ☐ I do not know the next checkpoint

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3. How easy was it to locate the current documentation you needed in the past two weeks?

- ☐ Very difficult
- ☐ Somewhat difficult
- ☐ Neither difficult nor easy
- ☐ Somewhat easy
- ☐ Very easy
- ☐ I did not look for documentation

4. After the most recent walkthrough, how ready did you feel to carry out the task it covered?

- ☐ I could not begin
- ☐ I could begin with substantial help
- ☐ I could complete it with occasional help
- ☐ I could complete it independently
- ☐ I did not attend a walkthrough
- ☐ The walkthrough did not cover a task I perform

5. When knowledge was missing, how easy was it to reach someone authorized to clarify it?

- ☐ Very difficult
- ☐ Somewhat difficult
- ☐ Neither difficult nor easy
- ☐ Somewhat easy
- ☐ Very easy
- ☐ I did not need clarification

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6. How clear was who would retain the needed knowledge if a contributor left or changed roles?

- ☐ Very unclear
- ☐ Somewhat unclear
- ☐ Neither clear nor unclear
- ☐ Somewhat clear
- ☐ Very clear
- ☐ Not discussed
- ☐ Not sure

7. What one knowledge gap should be addressed before the next checkpoint?
