



Worked example – a completed assessment

Meridian Systems, assessed 2026-02-10 · what an honest grid looks like

This is the toolkit's filled example of `assessment.md` : the fictional Meridian Systems (Module 2's example universe), scored honestly by two assessors in one 45-minute session. Read it to calibrate your own pass — especially what counts as evidence and what an honest NO looks like. Then note the shape it found: delivery running two levels ahead of governance, the most common and most dangerous configuration this instrument catches.

Dimension 1 – Capture

- ☒ **C1. YES** — Confluence KB exists; agents can create pages. *Evidence: 1,840 published articles.*
- ☒ **C2. YES** — the Zendesk macro requires a KB link or new page on resolved tickets, per a written work instruction. *Evidence: macro config; ~70% of resolved cases carry a link.*
- ☐ **C3. NO** — no AI drafting; agents author by hand when they author at all.
- ☐ **C4.** — (not evaluated past first NO; consecutive-YES scoring)
- ☐ **C5.** —

Capture: 2

Dimension 2 – Curation

- ☒ **U1. YES** — the KB owner reads new pages before flagging them "reviewed." *Evidence: reviewed label on recent pages.*
- ☐ **U2. NO** — there is no written standard to review against; "reviewed" means one person's judgment that day. *The honest answer, even though it felt like a YES in the room.*
- ☐ **U3–U5.** —

Curation: 1

Dimension 3 – System of Record

- ☒ **S1. YES** — Confluence is the designated home. *Evidence: support runbook names it; agents agree.*
- ☐ **S2. NO** — no typed templates; the same problem class appears as five different page shapes. *Evidence: sampled 20 pages, found free-form prose, tables, and screenshot dumps.*
- ☐ **S3–S5.** —

System of Record: 1

Dimension 4 – Delivery

- ☒ **D1.** YES — search works; agents and customers find what exists.
- ☒ **D2.** YES — agent-assist surfaces articles in-ticket; link rate is measurable. *Evidence: Zendesk reporting.*
- ☒ **D3.** YES — the Zendesk answer bot (live since last March) draws on the same Confluence space humans use. *Evidence: bot config.*
- ☐ **D4.** NO — the bot cites nothing, filters nothing, and never refuses. It reads drafts and stale pages alike.
- ☐ **D5.** —

Delivery: 3

Dimension 5 – Telemetry

- ☒ **T1.** YES — page views and search reports exist; the ops analyst reviews them monthly.
- ☐ **T2.** NO — participation and reuse are observed, not tracked against any standard.
- ☐ **T3–T5.** —

Telemetry: 1

Dimension 6 – Governance

- ☒ **G1.** YES — the KB owner is named and known. *Evidence: runbook; everyone points at the same person.*
- ☐ **G2.** NO — cleanup happens when something breaks or before an audit, not on a cadence. *Last sweep: fourteen months ago.*
- ☐ **G3–G5.** —

Governance: 1

Scoring grid

Dimension	Consecutive YES from Q1	Level
Capture	C1–C2	2
Curation	U1	1
System of Record	S1	1
Delivery	D1–D3	3
Telemetry	T1	1
Governance	G1	1

Dimension	Consecutive YES from Q1	Level
Organization level (lowest row)		1
Weakest dimension(s)	Curation · System of Record · Telemetry · Governance (four-way tie)	

Assessed by: **T. Okafor · J. Rivera** Date: **2026-02-10** (*Keep every completed grid; never edit a past one.*)

What the grid told them

Two readings, straight from `levels-and-next-moves.md` :

- 1. **Placement is Level 1** — not the Level 2 the team would have self-reported. The tie-breaks-downward rule did its job twice (U2 and G2 both "felt like" YES until evidence was demanded).
- 2. **The shape is the warning.** Delivery at 3 against Governance at 1 means a machine is already answering customers from an ungoverned corpus — the configuration the rollout playbook flags as "get the sequencing right before speed." Meridian's next moves came from the Level 1 row, not the Level 3 one: standards ratified first (see Module 5's worked example policy, effective 2026-04-30), the gate stood up second, prompts turned on third. The walkthrough that ships with every package — *One Issue, End to End* — picks up the story from there.

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