

AI SEARCH AND COMMUNITY SELF-SERVICE READINESS ASSESSMENT

If you own self-service strategy, your remit now extends well beyond your help center, bot flows, or IVR.

Customers solve problems, form opinions, and make decisions in AI search results, peer communities, and creator content long before they encounter a brand channel. Most organizations lack a clear, executive-level view of how prepared they are for this reality.

This assessment gives you that view.

It allows you to evaluate your organization's maturity, readiness, and situational awareness across the external ecosystems that now define self-service. It is designed for speed, clarity, and honest reflection.

How to Use This Assessment

For each statement, select the rating that best reflects your organization today.

Rating scale

- **1 – Not in place:** No consistent ownership, visibility, or process.
- **2 – Ad hoc:** Some awareness exists, but activity is inconsistent and informal.
- **3 – Defined:** Practices are documented and repeatable, but not yet optimized.
- **4 – Operationalized:** Practices are embedded in workflows and actively managed.
- **5 – Strategic:** Practices are mature, measured, and inform leadership decisions.

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Leadership Visibility Into Where Customers Start

Rate each statement from 1 to 5

- We clearly understand the top drivers of customer self-service demand.
- We know which issues customers resolve without contacting us.
- Leadership has reviewed AI search results for high-volume issues.
- We know which external platforms most influence customer problem-solving.
- We regularly identify where misinformation or partial guidance appears.

Your Total:

Readiness of the Organization's Source of Truth

Rate each statement from 1 to 5

- Knowledge content is accurate and consistently reviewed.
- Articles clearly explain how to resolve issues end-to-end.
- Content stands on its own without internal context.
- Knowledge is structured for AI discovery and summarization.
- Ownership and accountability are formally defined.

Your Total:

Organizational Posture in External Ecosystems

Rate each statement from 1 to 5

- We know where customers publicly discuss our product.
- We have a defined strategy for participating in those spaces.
- Engagement standards are clear and enforced.
- We respond quickly to high-impact misinformation.
- Responsibility for engagement is clearly assigned.

Your Total:

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Use of Distributed Customer and Creator Expertise

Rate each statement from 1 to 5

- We can identify our most influential advocates and creators.
- We provide them with accurate, up-to-date information.
- We proactively share changes that affect customer understanding.
- We equip them with simple reference materials.
- We view community expertise as a strategic extension of service.

Your Total:

Executive Measurement of Modern Self-Service

Rate each statement from 1 to 5

- We track issue resolution outside brand channels.
- We understand our visibility in AI-driven search results.
- We monitor accuracy gaps between official content and public answers.
- We track third-party sentiment shaping intent and trust.
- These insights inform executive CX decisions.

Your Total:

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Scoring and Interpretation

Add your scores across all sections.

Total possible score: 125

- **100–125: Strategic Control:** Your organization actively manages self-service across internal and external ecosystems.
- **75–99: Partial Alignment:** Key practices exist, but exposure remains in high-impact areas.
- **50–74: Reactive Posture:** Customers increasingly resolve issues outside your visibility.
- **Below 50: Structural Risk:** Self-service outcomes largely form beyond leadership control.

EXECUTIVE TAKEAWAY AND NEXT STEP

This assessment surfaces readiness but it does not close the gaps.

Organizations scoring below full strategic control face growing risk in trust, perception, and customer effort. Addressing that risk requires deliberate leadership action, cross-functional alignment, and a clear operating model for AI search and community-driven service.

Metric Sherpa works with senior CX leaders to diagnose exposure, redesign self-service for the external ecosystem, and turn insight into measurable execution. If this assessment revealed blind spots, the next step is not incremental tuning. The next step is a structured, executive-level engagement to take control of where customer experience now begins.

Contact our team at hello@metricsherpa.com for your introductory session.