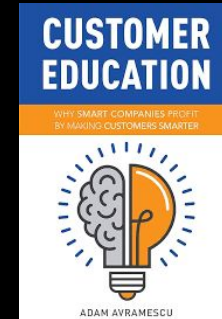
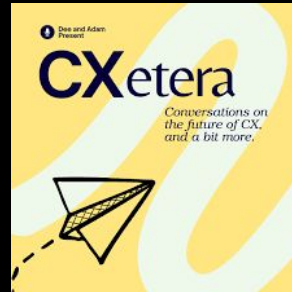


Customer Education in a Scaled CX World

Lessons learned from building
educational ecosystems

ADAM AVRAMESCU

Journey to success



01

Background

This is

a bit of a

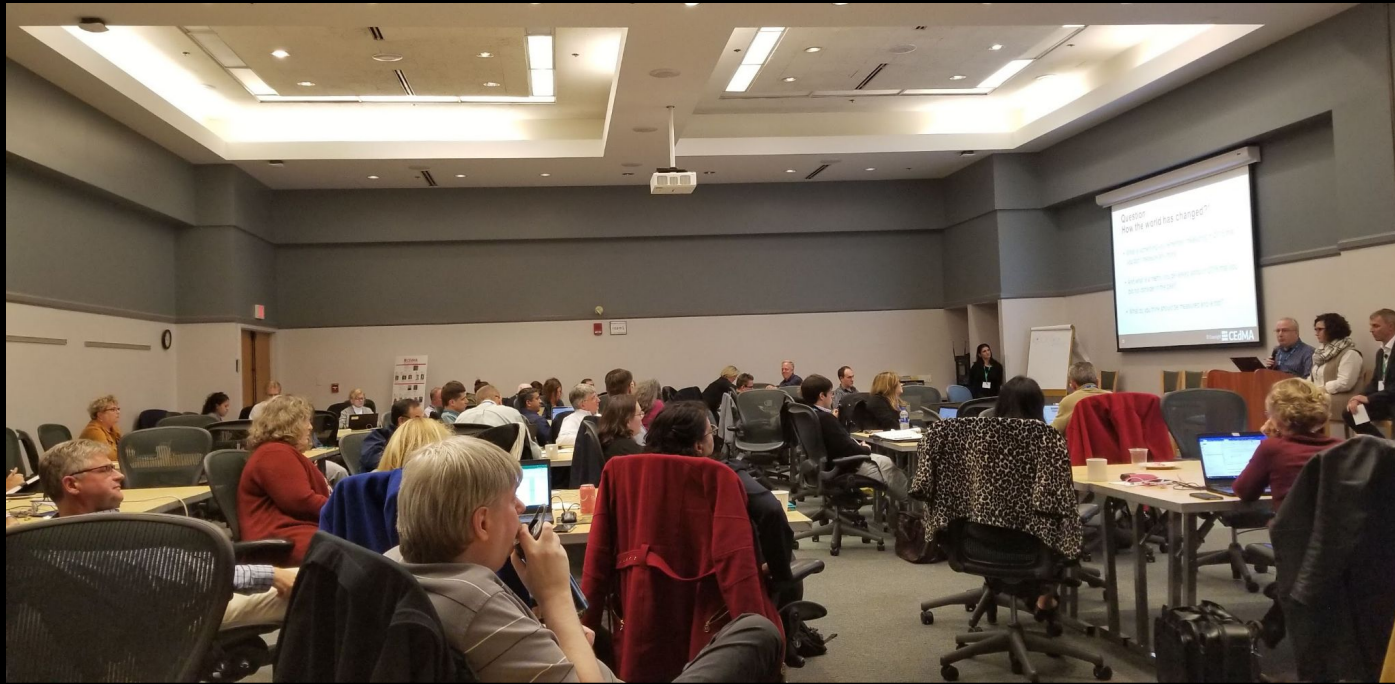
**FULL CIRCLE
MOMENT**

Me at the CEdMA
conference

(ca. 10 years ago)

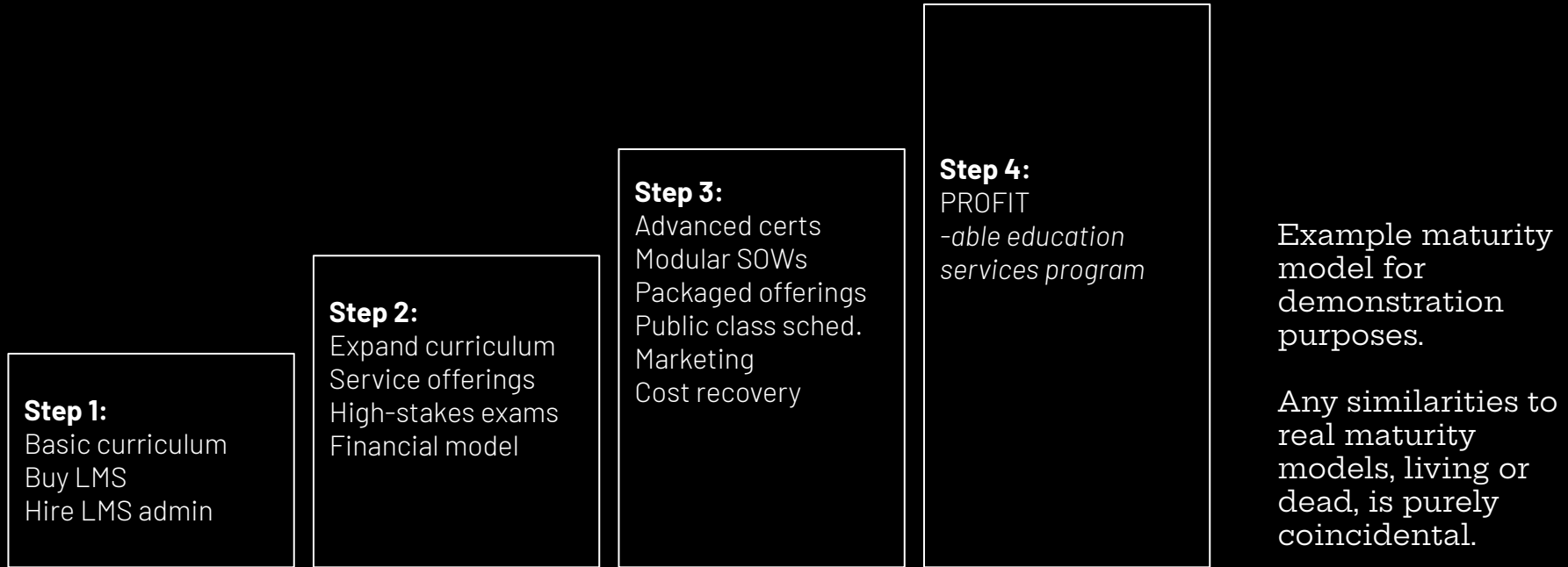
((no I do not know what this
hairstyle was supposed to be))



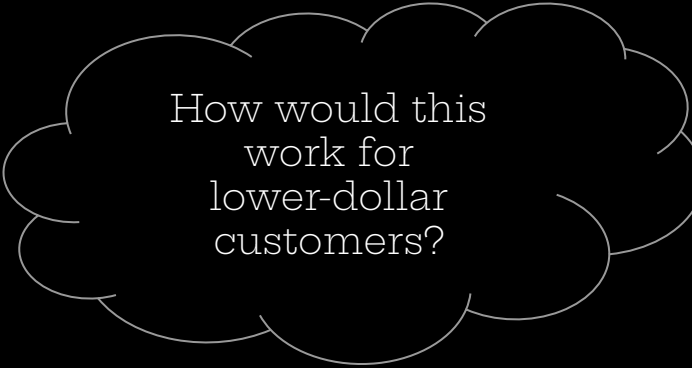


We were still in a world where
maturity = a healthy Educational Services P&L

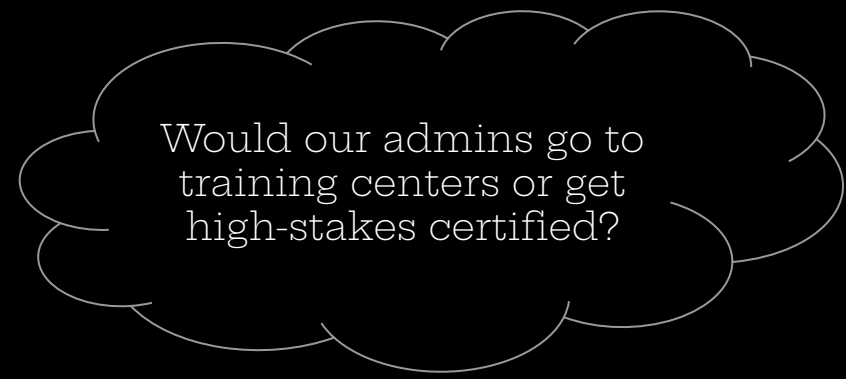
The path looked pretty linear




I had questions:



How would this
work for
lower-dollar
customers?



Would our admins go to
training centers or get
high-stakes certified?



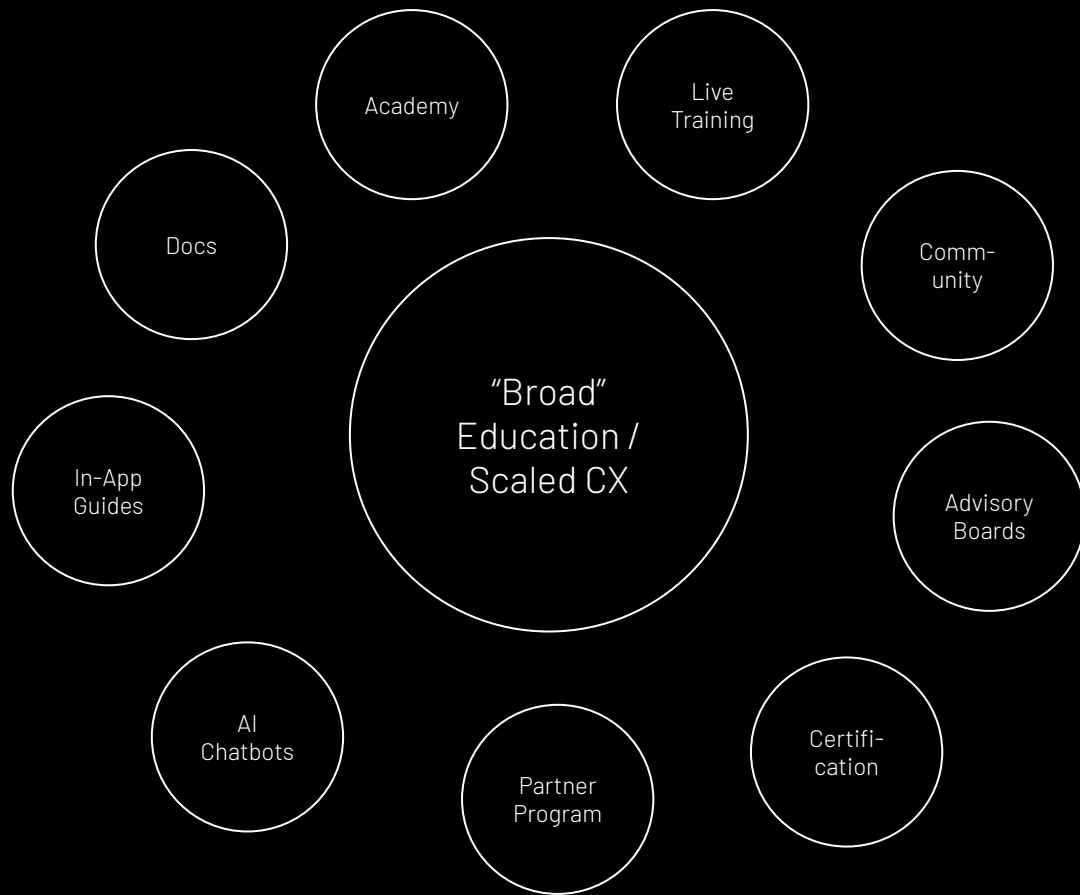
Does a profitable
edu services org fit
our business
strategy?

That dream is still possible,
given complexity, demand, and
sponsorship.

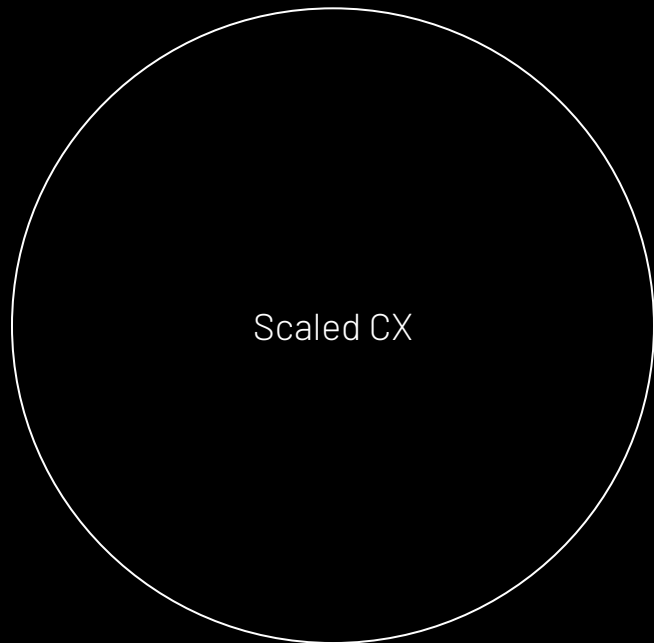
But it's not the only path.

If your education program is meant to scale the path to customers' success, that implies a range of programs.

Education can be an ecosystem



Education can be an ecosystem



- Branded
- Connected UI
- Unified Goals and Ops

This isn't rinse and repeat.

Each ecosystem is different,
based on your customer profile,
business goals, and skills
needed to achieve them.

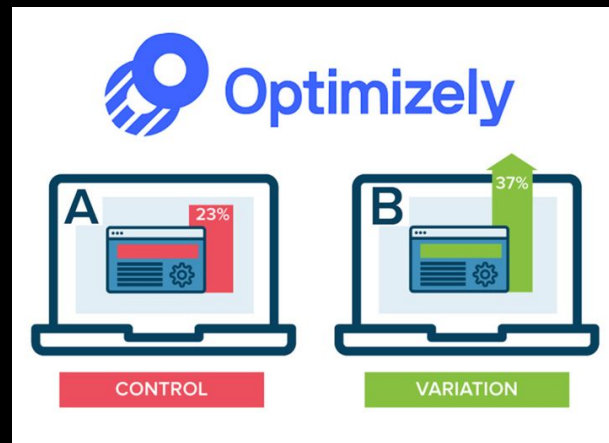
02

What's in an Ecosystem?

Optimizely

The company when I joined:
Product-led A/B testing for
marketers


The company when I left:
Enterprise experimentation
for web and product teams





The Hook for Customer Education


Over time, I heard...


- “We have a large unmanaged SMB segment who don’t know how to use the product”
- “We have expert Technical Account Managers and Optimization Consultants delivering trainings but that doesn’t scale”
- “Self-serve customers are churning because they never get to value with the product”
- “We need to be the organization that democratizes people’s ability to do web experimentation”



Home



Community



Knowledge Base


Academy


Support


Optimizely




Search the Optiverse... 

New here? [Join now](#) [Log in](#)


Welcome to the Optiverse

A place to learn, explore, and connect around experience optimization.

**Community**


Join the conversation: Ask questions, share your expertise, get Optimizely product support, and connect with other like-minded professionals.
[Learn more >](#)

[Visit the Community](#)

**Knowledge Base**


Get strategy and support knowledge: Browse help topics, FAQs, Optimizely feature documentation, and strategy best practices for testing and personalization.
[Learn more >](#)

[Visit the Knowledge Base](#)

**Academy**


Build your skills: Learn optimization essentials at your own pace through interactive, step-by-step courses.
[Learn more >](#)

[Visit the Academy](#)




Developers are an incredibly important audience to Optimizely.

Developers are an incredibly important audience to Optimizely. We want to make it as easy as possible for you to reference documentation and share code



Posted on 07/21/15 in Product What's New



Varun_Luthira

Ecosystem: The Optiverse

Anatomy of the ecosystem

Docs

Academy

Community

In-App

Help Center

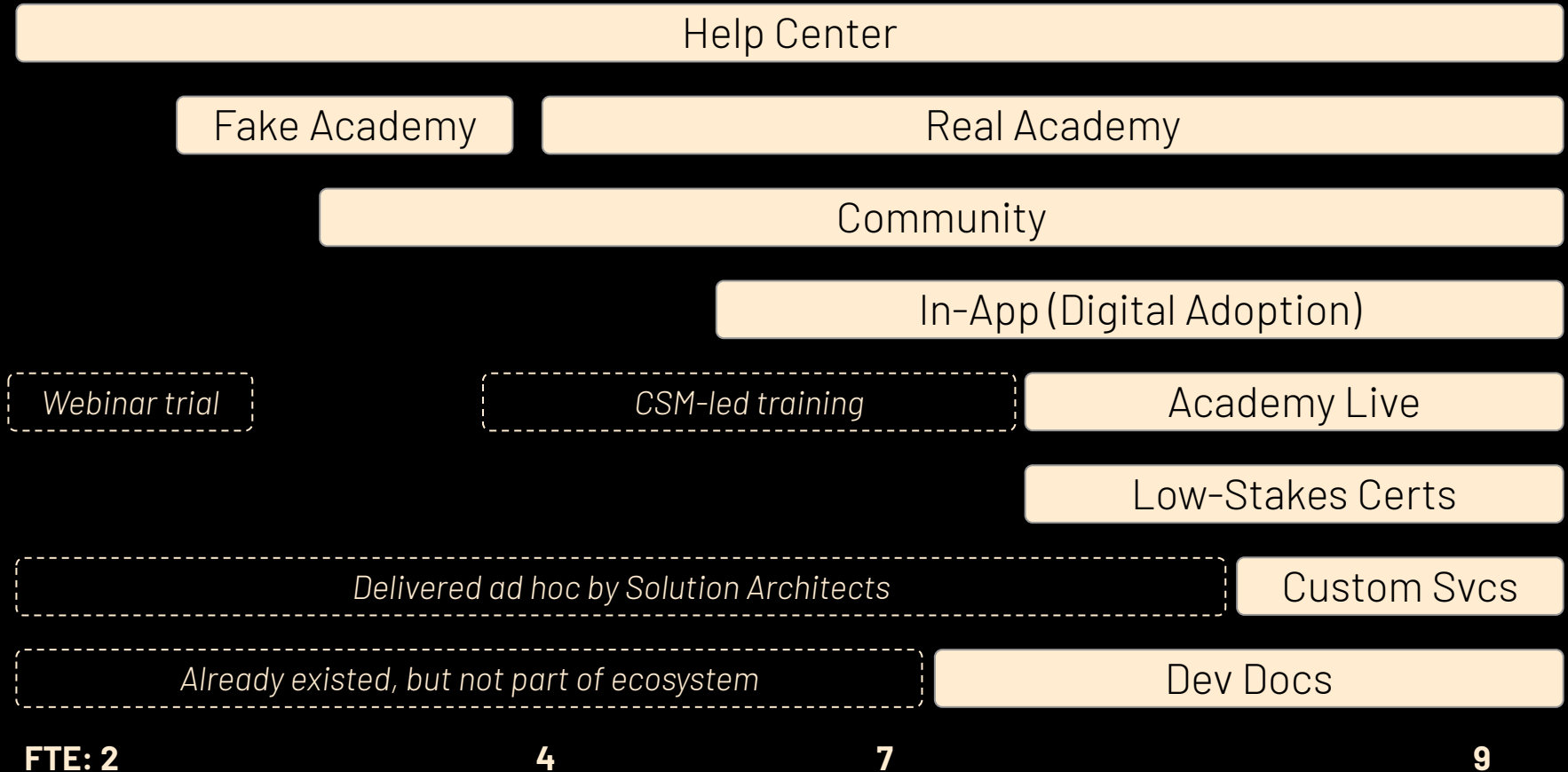
Online Courses

Dev Docs

Academy Live

Low-stakes Certs

My Optimizely timeline (4 years)



Impact

From early on, we tracked support ticket deflection.

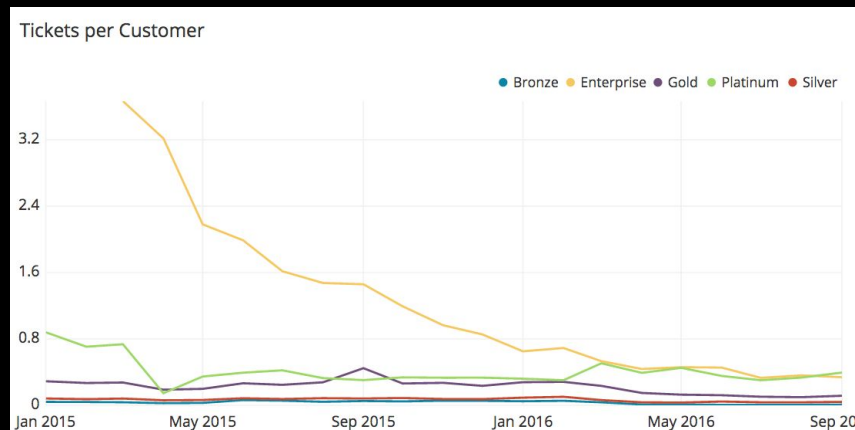
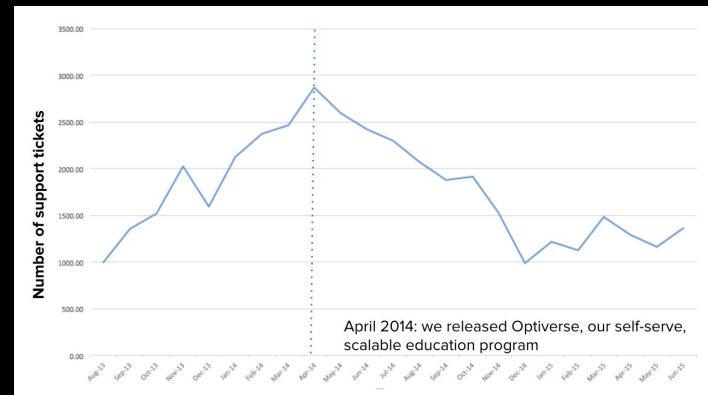
What probably worked?

Empathy. I would sit with the support team and work the queue during backlog spikes.

Discoverability. We measured it as an operational metric and designed federated search around it.

Community. Investment in a Community Manager to ensure p2p support coverage.

Marketing. Co-sponsoring with Customer Marketing drew attention & unlocked design resources.



Impact

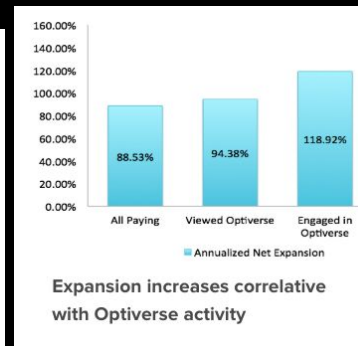
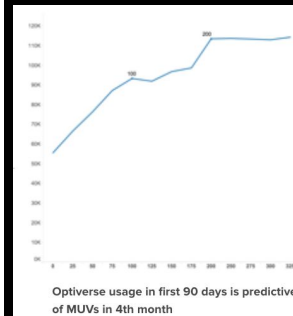
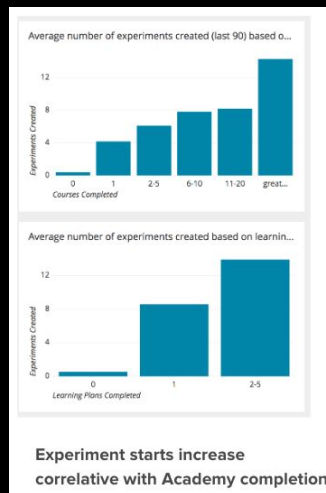
Each time the company developed a definition of adoption, we correlated Optiverse activity to it.

What probably worked?

Language of the business. This is how senior leaders viewed customer health.

Content relevance. We had the content to support the idea that we contributed to these metrics.

Correlation vs causation. We didn't claim that we *caused* adoption, but that we enabled it.



	Use the KB vs. those who don't	Complete Academy vs. those who don't	Use the Community vs. those who don't
Logins	3x	13%	26%
Experiments	8x	22%	40%
StatSig90	13x	44%	66%

Impact

When we had specific programs that could be tied to measurable impact, we did that.

What probably worked?

Collaboration with Product. We had their sponsorship to take this work on.

Measurable hypothesis. We were close enough to the intervention and the result.

Product analytics. Less debatable than web analytics.

Web Experimentation Onboarding in Pendo (pages & events) experiment results:

271%
INCREASE

Page
Creation



317%
INCREASE

Event
Creation



Set up Pages & Events

Approximately 15 min.

Pages and Events tell Optimizely where you'll run experiments on your site and what metrics to track. You'll create and manage them in this *Implementation* dashboard.

This guide helps you set up a Page and an Event.

Pages and Events are reusable. You'll use them later to build your experiments.



Not now

Get started

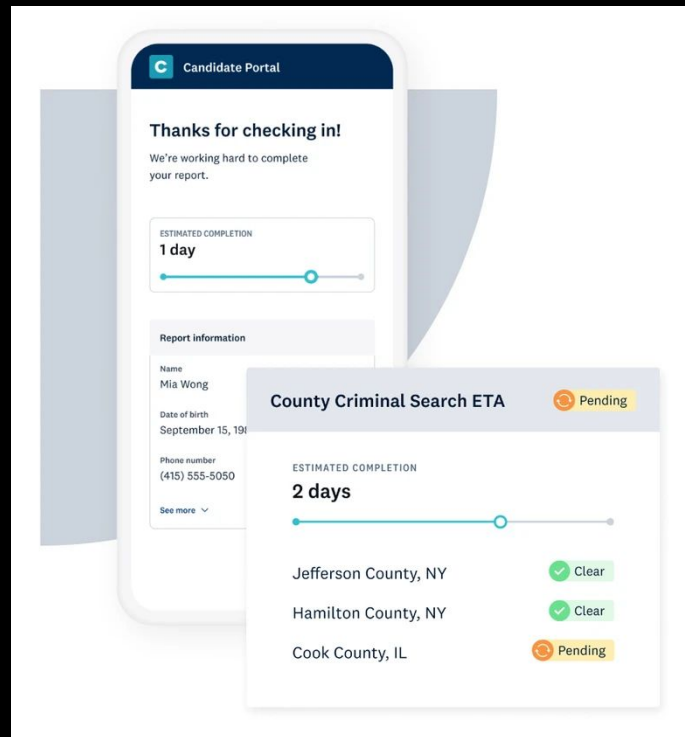
What didn't work?

- Eventually, exec sponsors changed!
- Grew the ecosystem to larger than we could support
- Always added, didn't deprecate
- Failed to argue for key additional headcount - not perceived as critical
- Possibly fell into a ROI trap - correlating after the fact

Checkr

API-driven background
check product focused on
on-demand apps, moving
into staffing & enterprise

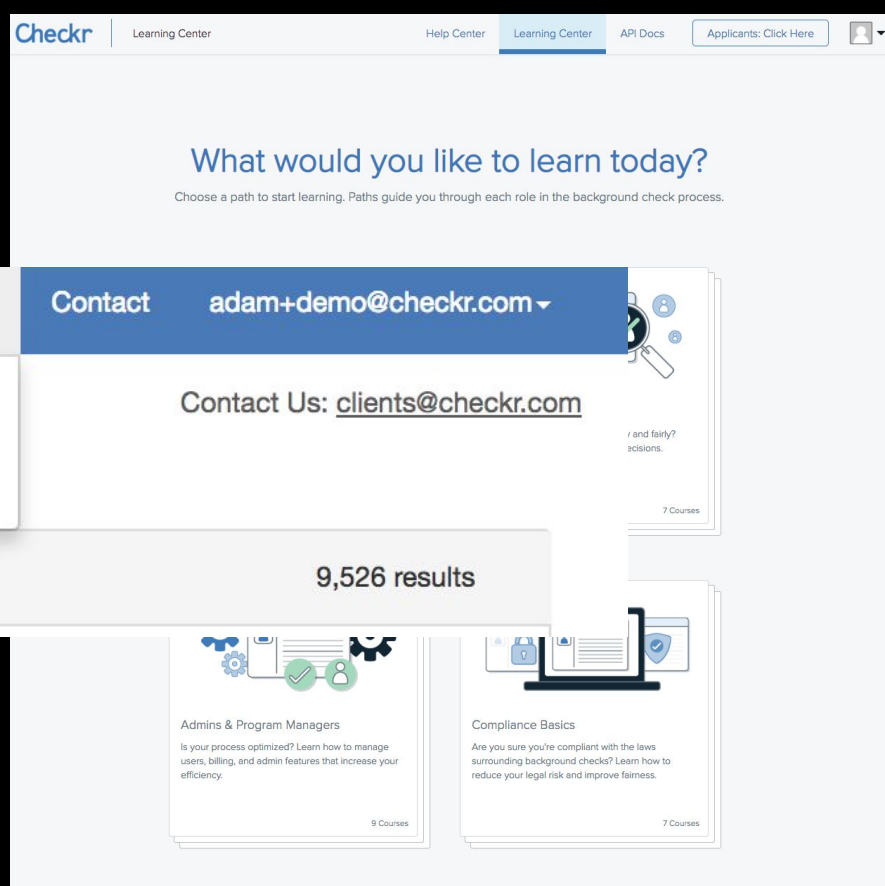
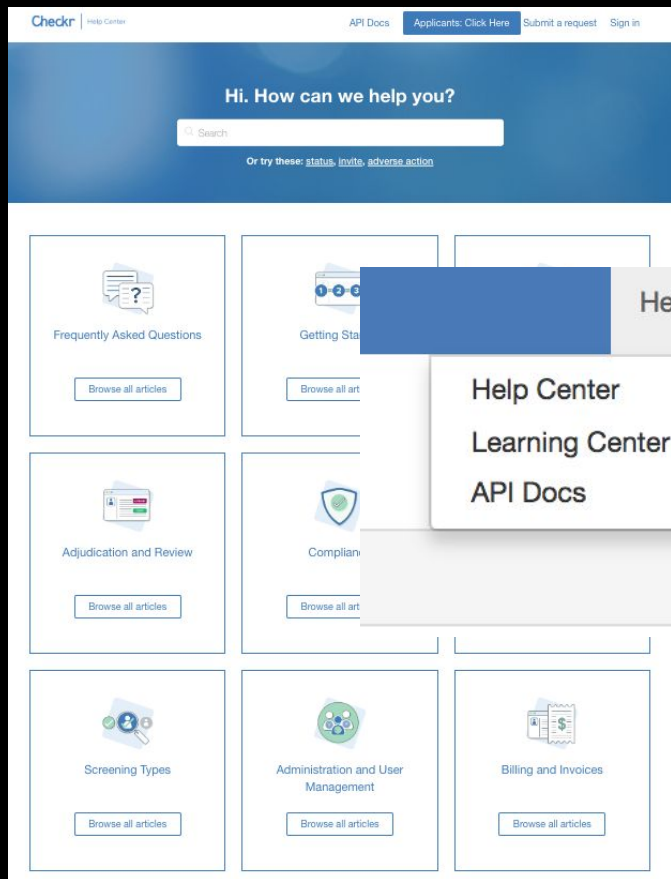
Simple UI for smaller
companies and candidates



The Hook for Customer Education

Over time, I heard...

- "Our customers have a legal and compliance obligation for their background check processes"
- "Our CSMs are spending too much time answering basic questions from customers"
- "Even our larger customers have many recruiters and evaluators who need to know how to use the product"
- "We can differentiate ourselves through our mission of enabling fair-chance hiring"



Ecosystem?

Anatomy of the ecosystem

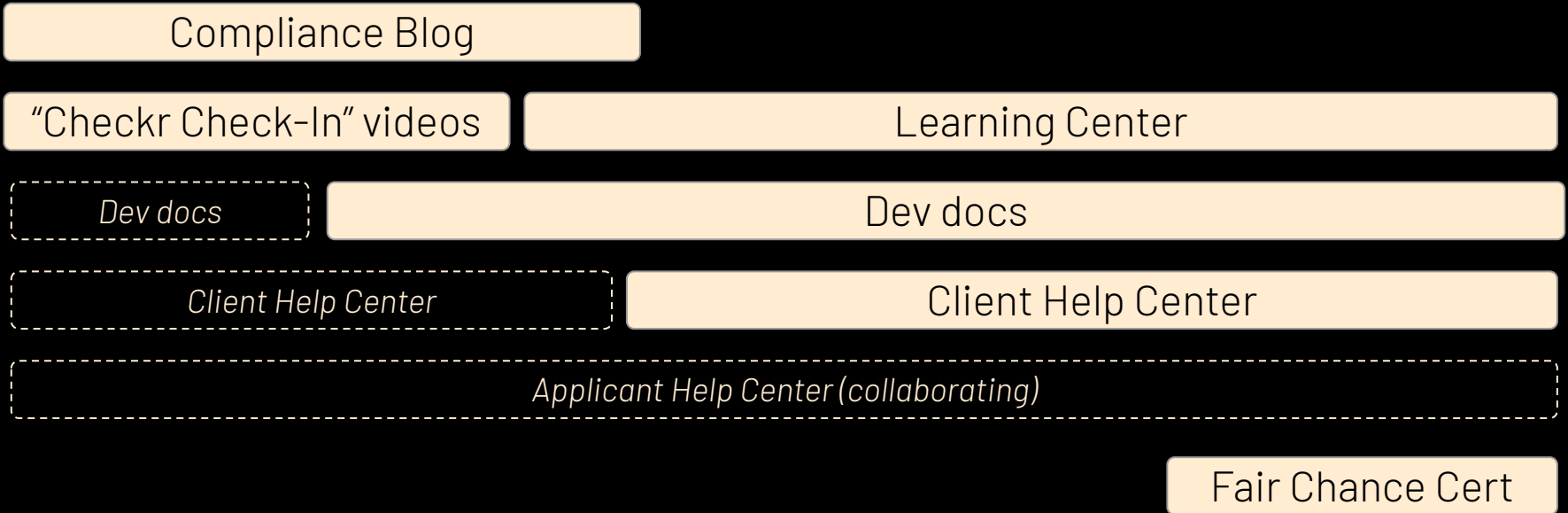
Client Docs

Applicant Docs

Dev Docs

Academy

My Checkr timeline (1 year)



FTE: 1

2

4

5

Impact

I started in pure build mode. The Learning Center only measured activity and account penetration.

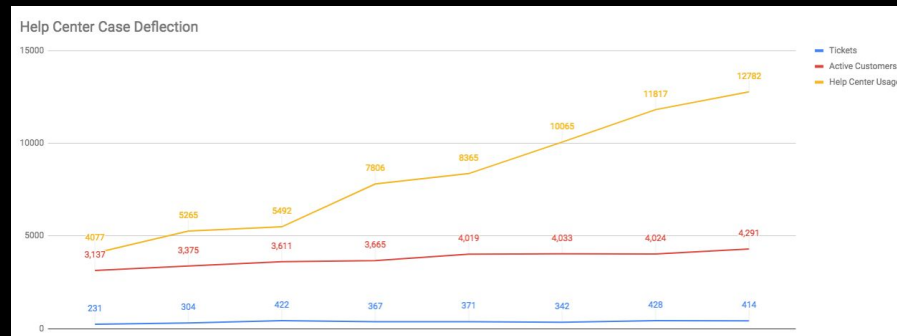
Once we started working on help docs, we achieved a 12% decrease in contact rate (on a 10% goal).

What probably worked?

Bias for action. I didn't start with elaborate curricula; I started making videos.

Vision. I shared the ecosystem vision early and pushed for key UI/reporting elements that would get us there.

Consulting around the business. I didn't actively try to take things over; people came to me to solve problems. Headcount & program growth came from that.



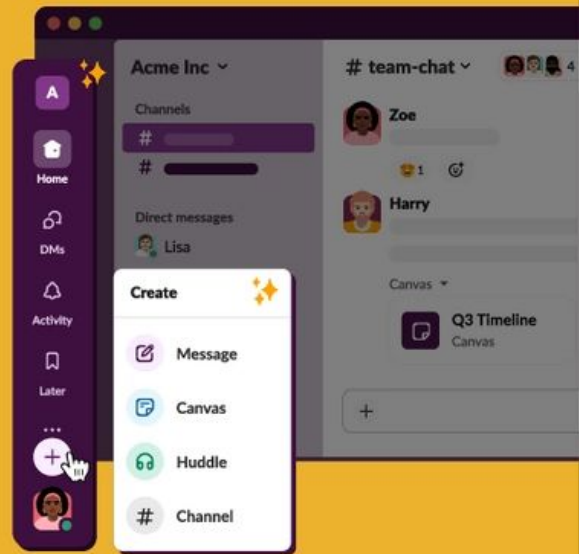
What didn't work?

- Not enough time to see the programs through

Slack

When I joined: Product-led collaboration platform building a GTM motion for large global enterprises.

When I left: Multiplayer, “wall-to-wall” with high end user adoption. Acquired by Salesforce.



My Slack timeline (3 years)

Help Center, User Education, Developer Relations, Scaled CS, Champions, Community

Learning Services

Slack Certified (high-stakes certs)

Slack Skills (low-stakes badges)

Partner Academy

The Hook for Customer Education

Over time, I heard...

- "Enterprise customers need more change management and enablement to roll out Slack across the company"
- "Specific business units need to use Slack in specific ways, and we need to show them the art of the possible - then enable it"
- "We need a network of qualified admins and developers who are loyal to Slack and bring it with them from company to company"
- "We need a network of partners who can deliver Slack services and set up apps"

Slack Certified

Grow your Slack skills and prove your knowledge to the world.

Slack Skills

Take courses to earn badges and become a specialist in Slack.

[Earn badges →](#)

Slack Certified Admin

For Slack admins at organizations of all sizes, unlock the full functionality of Slack and verify your proficiency as a Slack Certified Admin.

[→](#)

Slack Certified Consultant

Prove you have the skills to implement Slack and set clients up for long-term success.

[→](#)

Slack Certified Developer

Take your skills to the next level and help build the future of work as a Slack Certified Developer.

[→](#)

Join a Slack Community Chapter

Get involved in a local chapter, where you can meet up, join events, and exchange tips and tricks with people in your city. Chapters are open to all.

[JOIN A CHAPTER](#)

Slack Community chapters are meetup-style groups run by dedicated volunteers who want to spread their passion for Slack to their local community. Join us to connect, share and create the future of work with other beginners, experts, developers, designers and more.

Thrive

Level up your skills, grow your career, and work with others to invent the future of work.

Inspire

Indulge your curiosity, find new ways to solve problems, and harness your creativity while empowering others to do the same.

Give

Share your expertise with the community to foster new ways of thinking, working and collaborating.

Connect

Find allies to innovate, network and grow with. Make friends and have fun!

Tutorials & videos

Learning Slack made simple: tutorials, videos and tips to get up to speed and get work done.

[Getting started](#)
[Using Slack](#)
[Your profile](#)
[Connect tools](#)
[Administration](#)
[Tutorials & videos](#)

Tutorials

- Find and start conversations
- Collaborate effectively in channels
- Find information that you need
- Keep work organised with channels
- Focus on what matters to you
- Run a productive meeting
- Finish projects faster
- Work with external partners in Slack

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[REQUEST A DEMO](#)
[GET STARTED](#)

TABLE OF CONTENTS

- [Become a Slack Champion!](#)
- Slack Champions are change agents and advocates who take action to amplify the success of Slack within their organization.
- [Join the Slack Champion Network](#)
- [Champion Training Center](#)
- [Upcoming Events](#)
- [Past Events](#)

2 min read

Become a Slack Champion!

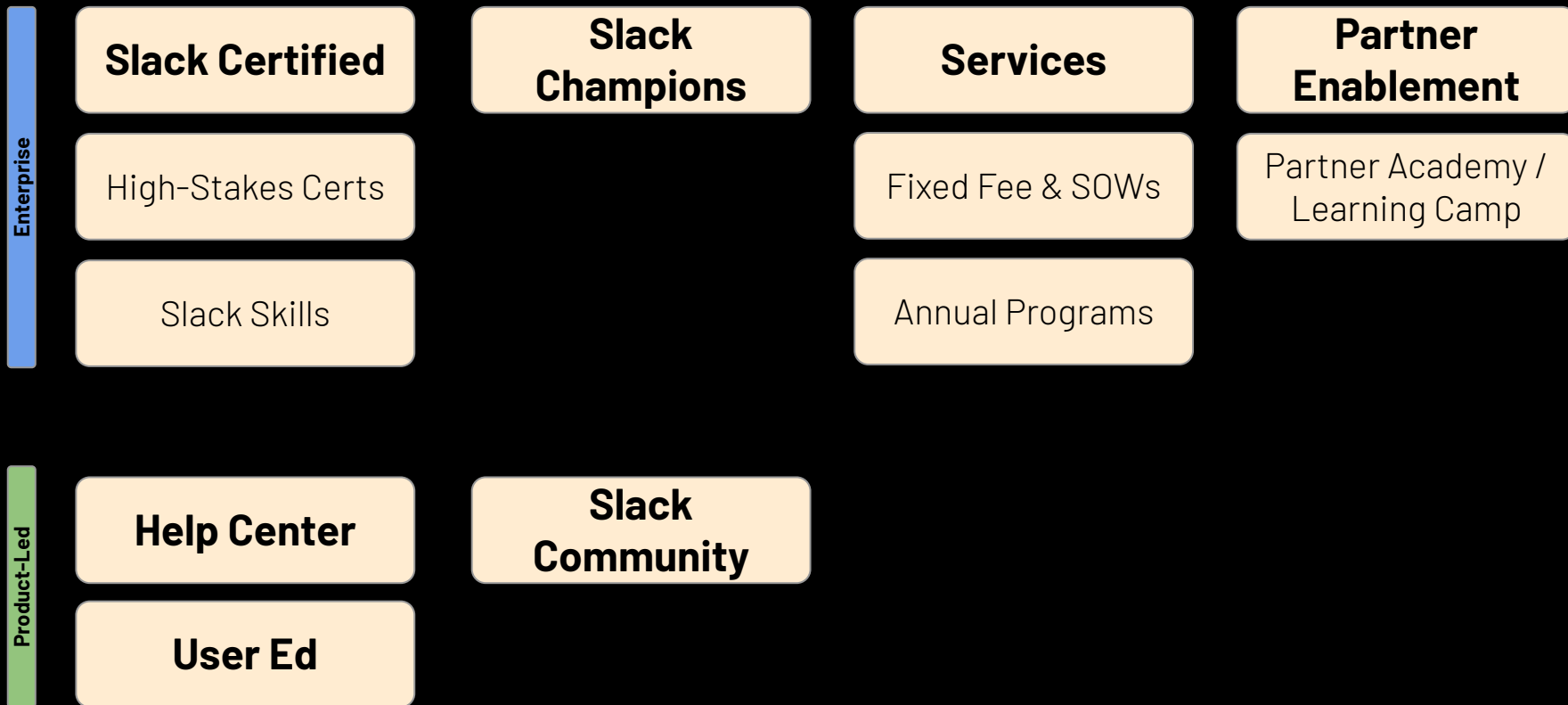
Slack Champions are change agents and advocates who take action to amplify the success of Slack within their organization.

Do you speak Reacti? Prefer Clips over typing? Does a completed workflow or the clean slate of a new Canvas give you goosebumps? If you're passionate about elevating performance through Slack's communication and productivity features, then the **Slack Champion Network** is for you!

Not sure where to get started? You're in the right place!

Ecosystem? Kind of?

Anatomy of the ecosystem



Impact

Building services was slow and steady, and largely investment-based. Two years in, Slack Certified achieved modest revenue but grew reach via enterprise customers and partner networks, after passing Salesforce's evaluation standards post-acquisition.

What probably worked?

Cross-functional collaboration. I considered User Ed, Scale CS, Dev Relations, etc. key partners – and we often relied on them for curriculum.

Distinguishing high-stakes and skill badges. This gave us a way to distinguish requests.

Piloting. We embraced the “sketchy baby” before scaling.

Triangulating reach, revenue, impact. Forcing a choice.

Customers Agree!

“Slack’s administration course gave me the know-how and confidence to begin running Slack at an enterprise level.”

Corey Smith
System Dev Engineer, Ring

“I would absolutely recommend the course, because there’s no better place to learn from than the experts themselves.”

Brittany D. - 2nd 🏆
Project Manager at Nielsen

“I found the program very valuable—to get a clear perspective of various use cases and how to handle them, to understand Slack best practices and get comprehensive guidance in tackling admin solutions and overall Slack configuration.”

Swarna Mani
Manager, Guidewire

“While I had been using Slack for years, the Slack Certified Admin program helped me hone my skills and confirm Slack best practices. With this new confidence, I’ve been able to onboard and teach other Slack admins!”

Tahishia Simmons - 2nd 🏆
Principal Product Analyst at Robots and Pencils

What didn't work?

- Quite a bit of “shipping the org chart” vs true ecosystem
- Starting with high-stakes meant heavy builds and lower reach (including partners)
- Spending so much time on revenue recognition and revops
- We aligned curriculum but didn't truly scale CSM-led training
- It took a mental toll!

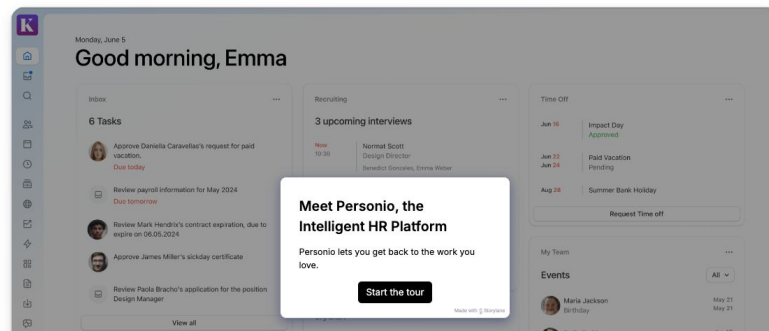
Personio

Leading HR software in Europe focused on SMB. Many low-ACV accounts who have low HR knowledge but a need for compliance.

Get back to the work you love with the Intelligent HR Platform

Personio is powered with smart automations, dynamic adaptability, and proactive insights to help HR teams prioritise their people.

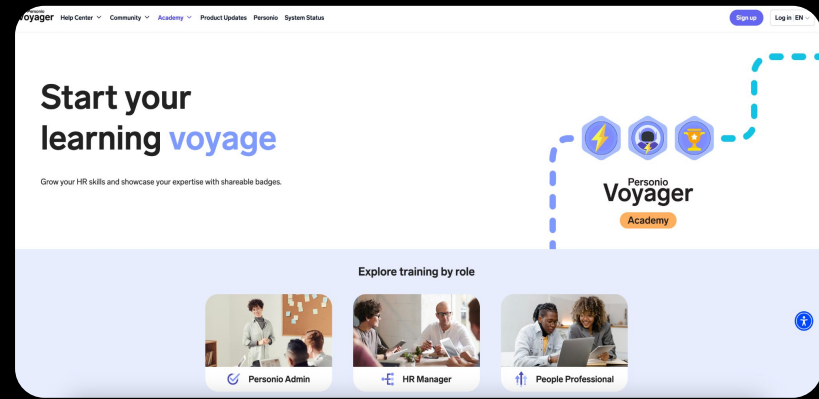
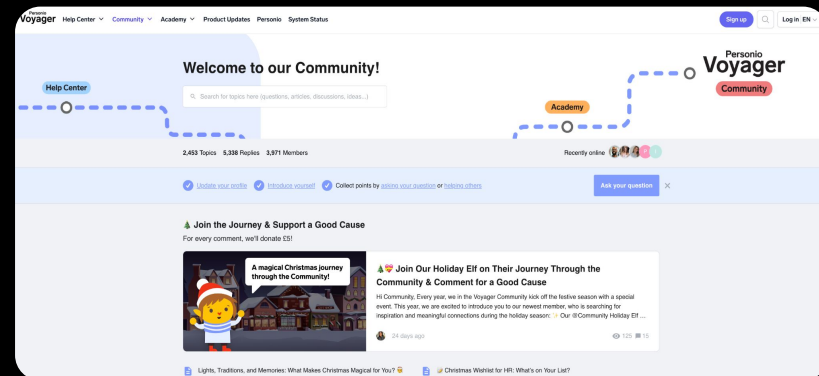
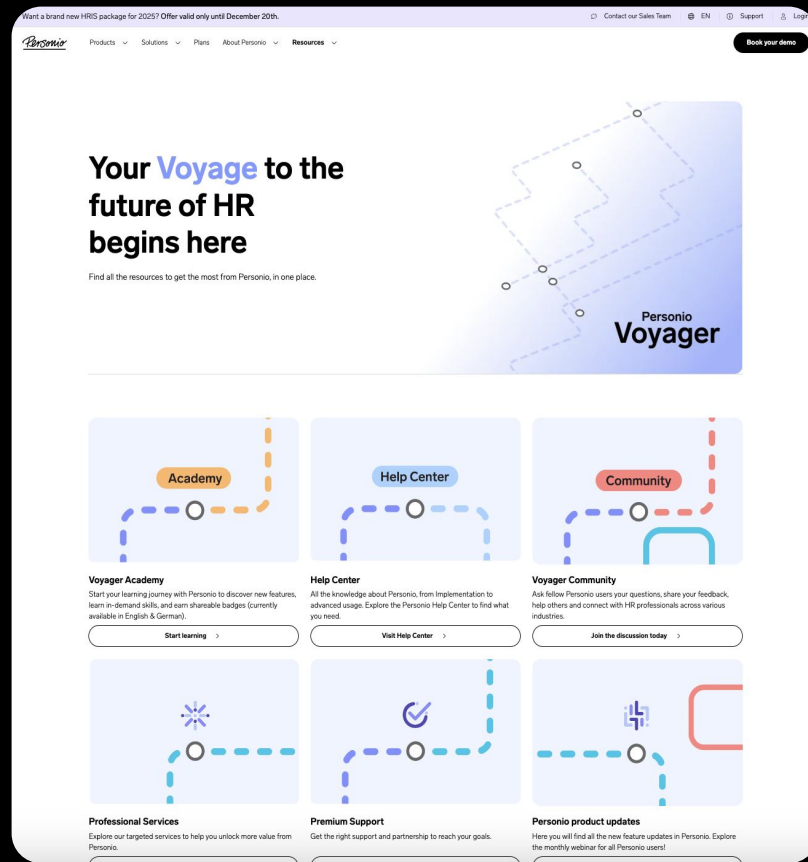
[Book a demo](#)



The Hook for Customer Education

Over time, I heard...

- "We're making a proactive investment in scaling support"
- "We already have a help center and community and want to unite them and grow"
- "Our implementation managers spend too much time on repetitive tasks"
- "We need to support more efficiently - driving Contact Rate and Handling Time"
- "We need to make activation more predictable and customer-friendly"



Ecosystem: Personio Voyager

Anatomy of the ecosystem

**Docs & Content
Ops**

Academy

Community

Digital CX

Help Center

Online
Community

In-App

"What's New"

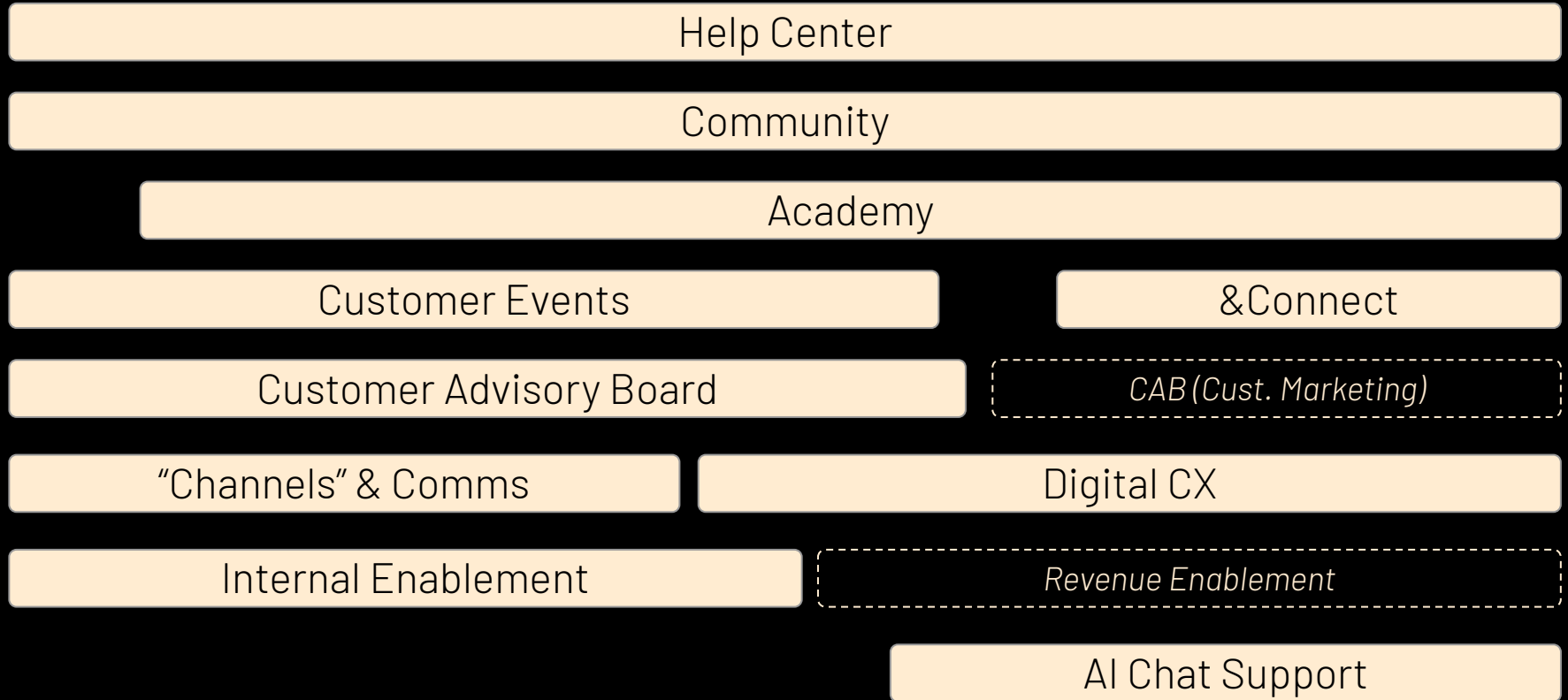
Customer Events

Email

Video

Advisory Board

My Personio timeline (3 years, so far)



The strategy is consistent

We started with a focus on operational efficiency and contact rate. That's become even more important in today's economy!

But we also know the "frontiers" we should move for, and that informs which initiatives we prioritize.

Our strategy

(updated for 2025+)

Because we help customers at scale, we build operational efficiency via lower contact rates & handling times.

With the right content and programs at the right time, we increase activation, adoption, retention and ultimately NRR.

If we build this right, we'll differentiate Personio in the market by being the #1 educational brand in HR.



Power the Personio Economy (longterm)

Drive **career success** for HR/Payroll professionals and a competitive moat for Personio, creating brand advocates.

Grow the brand (ongoing, increase focus)

Through the Voyager ecosystem, drive **higher engagement** with our product, yielding activation rates, customer satisfaction and ultimately retention.

Build the base (ongoing)

Drive **operational efficiency** via customer self-service and contact rate deflection, and reducing manual efforts around activation/adoption.

Impact

Our first goal has always been Contact Rate and driving efficiency through scale. With Digital CX, we're also driving activation and adoption for smaller customers.

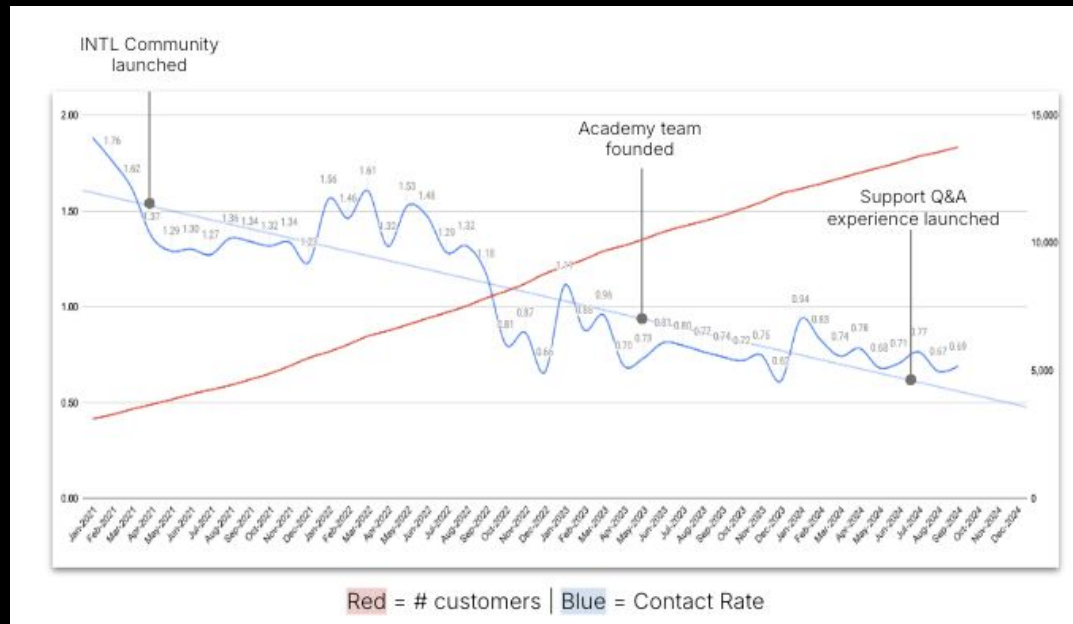
What probably works?

Voyager brand vision. We have a vision anchored on an educational brand.

Cross-functional collaboration. Constantly aligning with Product, Marketing, and CSM to drive common goals.

Taking a number. Commitment to Contact Rate holds us accountable to protect the bottom line.

Team identity. We show up together and move toward the vision, even if not everyone agrees.



-0.78

Total Self Serve Volume vs Contact Rate:

consumption of our self-serve resources is a strong predictor of **lower** the Contact Rate



0.89

Total Self Serve Volume vs Adoption Health Score:

consumption of our self-serve resources is a strong predictor of **higher** Adoption Health Score

03

The future

The ecosystem structure isn't
the important part.

This could all look different

Docs

Source of truth will still be important, but creation and distribution more automated. Design for AI distribution.

Training

Content dev will become more accessible, but stronger divide between “microlearning” and “training services.”

Community

People and connections will still be important, but how long will online forums remain?

Digital CX

May just become “CX” - not an adaptation of high-touch CSM practices

Paying attention to your
business is the important part.

Pay attention to what your business needs.

Position your unique solutions and get in the mix.

Take a number that ties to revenue.

Build a track record and make the case for a right-sized team.

And keep questioning.

Things will keep evolving.

THANK YOU