

empowerED25



The GTM Mindset: Monetizing the Customer Lifecycle

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**Learn how to make your
team indispensable!**

Today's Learning Objectives

In today's session, you will learn:

- What a go-to-market mindset is and why it's important
- How to link to and drive revenue at every stage of the customer lifecycle
- Actionable tips to begin your GTM conversion



Agenda

- The GTM mindset
- Monetizing the customer lifecycle – for each stage:
 - How to apply GTM mindset
 - GTM impact metrics
 - Content engagement strategies
 - Real-life case studies
- 5 key actionable tips to convert to a GTM mindset
- Next steps



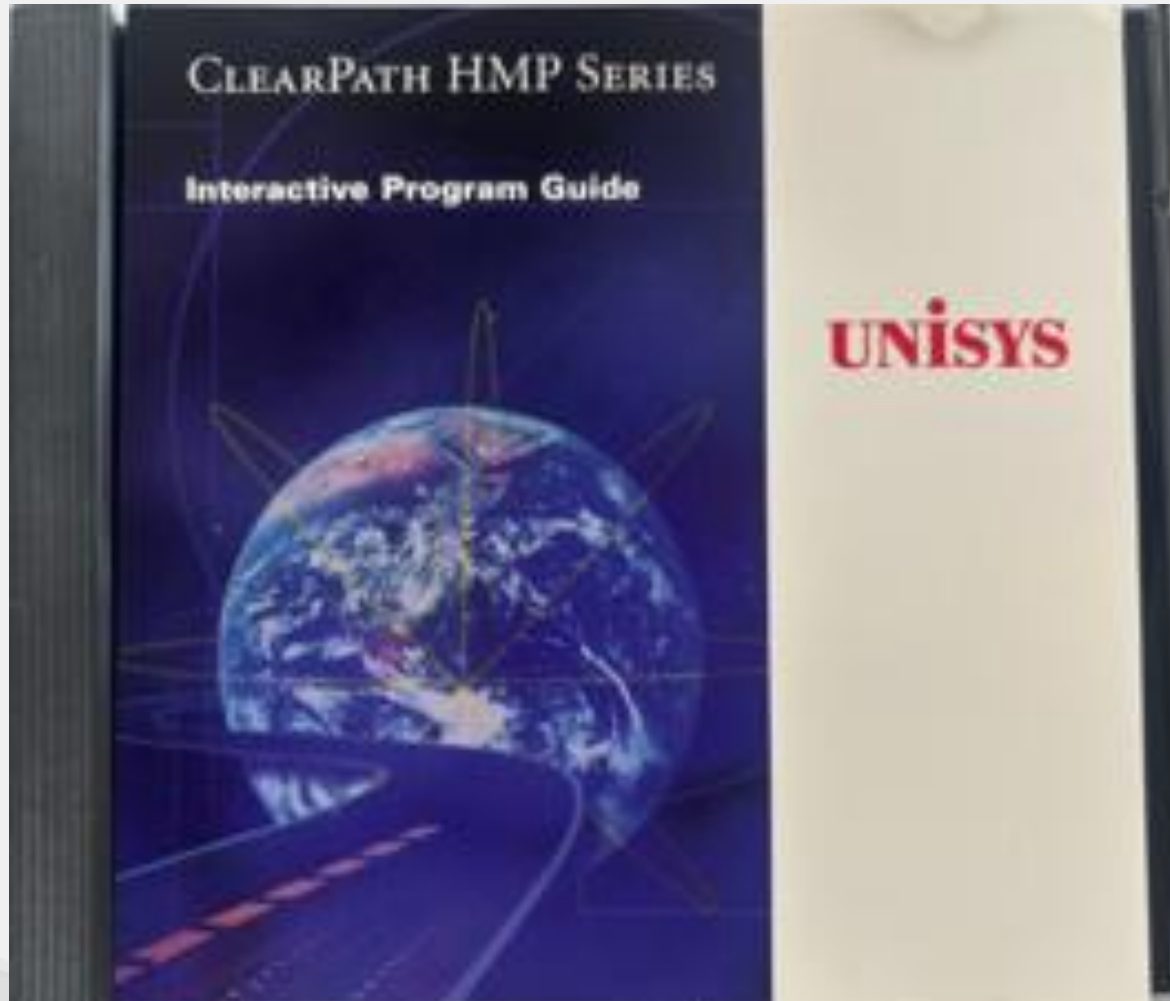
The Customer Ed Professional? Quick Poll

Your path to become a customer education professional?

- Customer service or support
- Direct or channel sales
- Operations
- Marketing
- L&D, HR,
- Other



1998 – Discovered GTM Learning



2000 – Discovered GTM Was Universal



2001

The Dot-Com Bust

The Rise and Fall

The Nasdaq Composite Index, daily close



**And Again in
2008**

**And Again in
2020**



When Times are Tough...

*Cost savings
personnel are
expendable, those
who impact revenue
are not!*



*To make yourself and your customer education team
indispensable in good times and bad...*

Develop a GTM Mindset

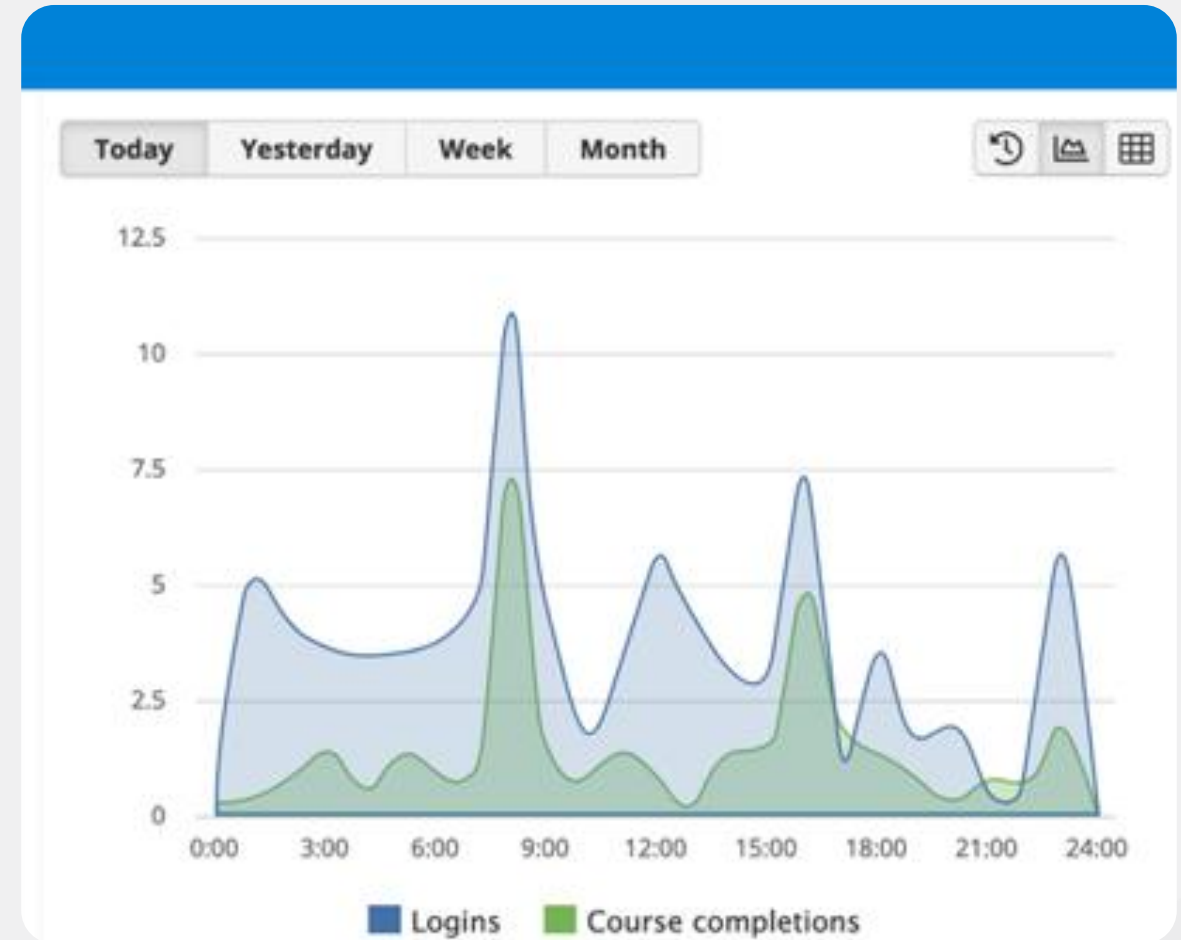
Characteristics of a GTM Mindset (Individual or Team)

- Strategic
- Revenue-Focused
- Data-Driven
- Influential
- Impactful
- Growth-Oriented
- Customer-Centric



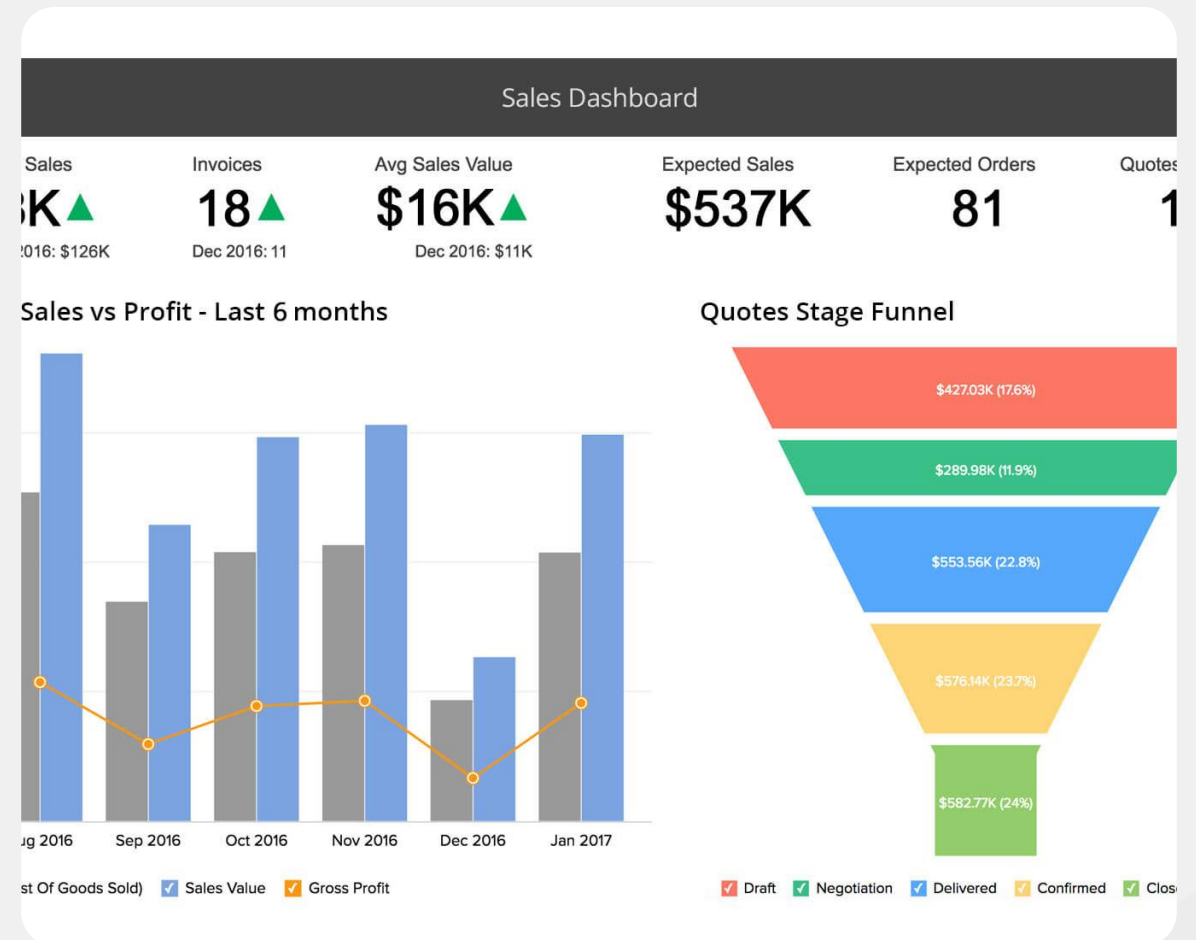
Training Progress Reports – Any LMS

- New accounts / inactive accounts
- Login attempts
- Content purchase
- Registration and attendance
- Individual and group training progress
- Certifications
- Time in system or content
- Social interactions
- Test scores
- Engagement score
- Skills and competencies



Business Data Sets

- Marketing and Lead Conversion
- Sales Performance
- Customer Support and Service
- Product Usage
- Customer Retention
- Partner and Channel



The 8-Step Data Shuffle

Learning to Earning – Make Step Move Count

1. Get access to business data
2. Pick your training data metric
3. Create equal groups of learners who have or who have not done something
4. Compare same two groups on business performance metrics
5. Calculate your GTM impact
6. Become indispensable
7. Be loud about it
8. Repeat



GTM Impact of Customer Education



Improve Business Processes

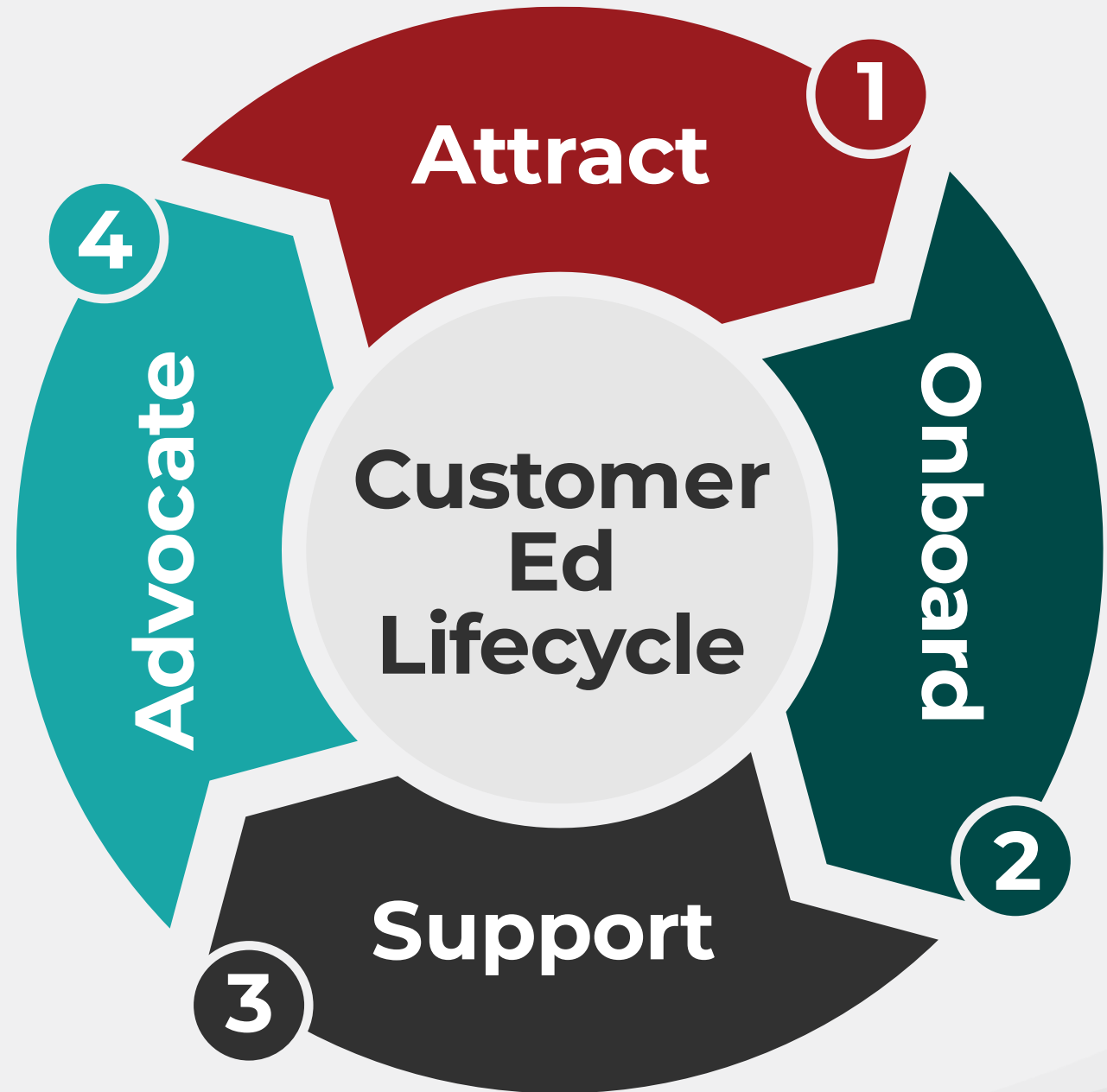


Reduce Costs



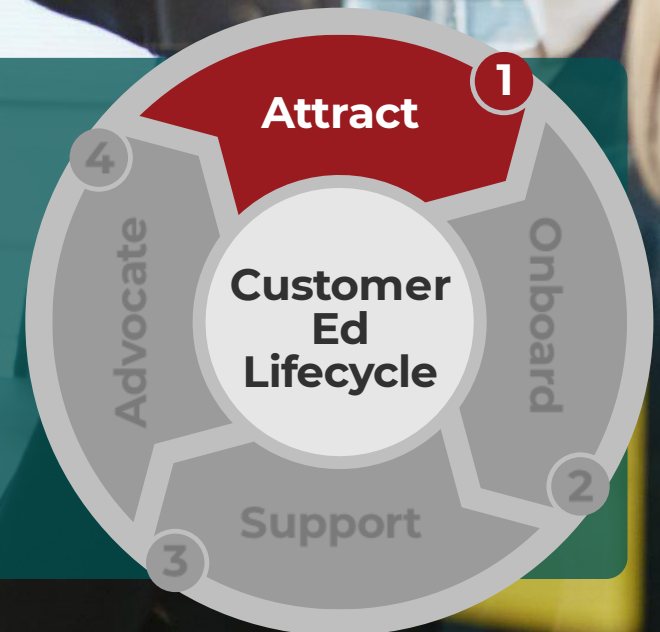
Increase Revenue

GTM Mindset Throughout the Lifecycle



ATTRACT NEW CUSTOMERS

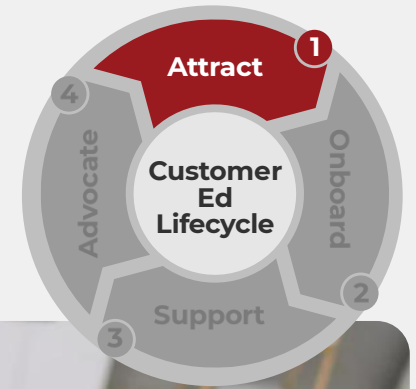
Drive pipeline growth by using education to attract, qualify, and accelerate deals.



Attract – Key GTM Impact Metrics

Indirect Impact Metrics

1. Educated qualified sales leads
2. Sales accepted leads
3. Sales revenue
4. Average sales price
5. Sales cycle duration
6. Win rate %
7. Customer acquisition cost
8. Cost per lead
9. Revenue per rep
10. Upsell/cross sell revenue



Attract – Content Engagement Ideas

- Provide education programs to universities and high schools
- Free and frictionless content for all
- Paid certifications and labs
- Content syndication
- Nurture marketing campaigns based on training or any interaction





Overview: LI-COR Biosciences is the leading innovator in systems for plant research, drug discovery, protein research, and small animal imaging.

Strategy: Create a centralized university with tailored lead generation and outreach for customers, partners and prospects.

Metrics: New Leads, hours content consumption

Technology: Skilljar LMS, Marketo

[LI-COR Website](#) | [Case Study](#)

In 2.5 years:

4000+
New Leads

2800+
**Hours
Content
Consumed**



Overview: B2B sales training company with 41,000 individual, SMB and enterprise learners

Strategy: Move to commercial LMS, new product lines, ecommerce focus

Metric: Revenue, Retention Rate

Technology: Thought Industries

[Sales Gravy Website](#) | [Full Case Study](#)

10x

Increase in
Revenue

93%-100%
Retention
Rate



Overview: #1 most used database with 54K organizational customers. Many started out as free learners or users

Strategy: Free and frictionless content for all. Among others outreach program /certifications to high schools and universities. Get them hooked early, use to get a job become an influencer or eventual buyer.

Metrics: Leads (new developers), certification and proctored exam direct revenue, product adoption

Technology: Ecosystem of 21 integrations!

175K

Developers join every month
(future leads)

Direct Training
Revenue

[MongoDB Website](#) | [Case Study](#) | [Podcast Interview](#)

ONBOARD NEW CUSTOMERS

Accelerate time-to-value to reduce churn risk and open the door for expansion revenue

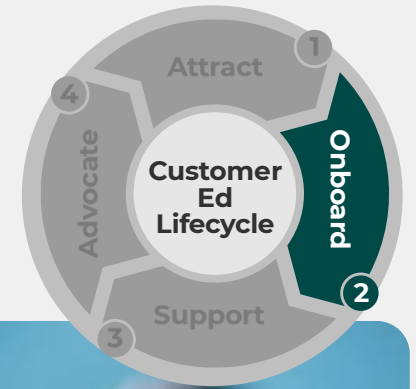


Onboard – Key GTM Impact Metrics

- Upsell and Cross Sell Opportunities
- Time to First Value
- Early Churn
- Support Ticket Volume
- Support Ticket Resolution Time
- Adoption rate
- Customer satisfaction score
- Net Promoter score



Onboard – Content Engagement Ideas



- Adaptive training plans
- Quick win tutorials
- Use case scenarios
- Interactive walk throughs
- Customer stories
- Incentive and reward program
- Actual product usage drives content
- Virtual office hours
- Certification programs



GENCAT

Overview: Leading provider of support services to companies engaged in road transport and commercial vehicle drivers working in the sector

Strategy: 10 modules targeted at customer learners to teach driving techniques to reduce maintenance and fuel consumption.

Metric: Fuel savings, maintenance costs, trees saved

Technology: [Eurekos LMS](#), Marketo

[GenCat Website](#)



CO2 saved

4,411,572 kgs =

Equivalent Carbon
dioxide saved by
210,074
trees in a year

\$1¹⁸/liter

=

\$1,942,408

fuel savings

Fuel Savings

Fuel SAVINGS

6.4%

Millions of Litres Saved

1,646,109

Millions of Kgs of CO2 Saved

4,411,572



Overview: 750M organization supply chain software org serving over 3,000 customers, sells courses that educate and support its users, helping them get the most out of the platform.

Strategy: Incremental product line of 30+ certifications and courses that support the Coupa product line sold via LMS ecommerce

Metrics: Direct Revenue, Certifications

Technology: LearnUpon LMS

[coupa Website](#) | [Case Study](#)

\$10M

**in revenue generated from
selling courses**

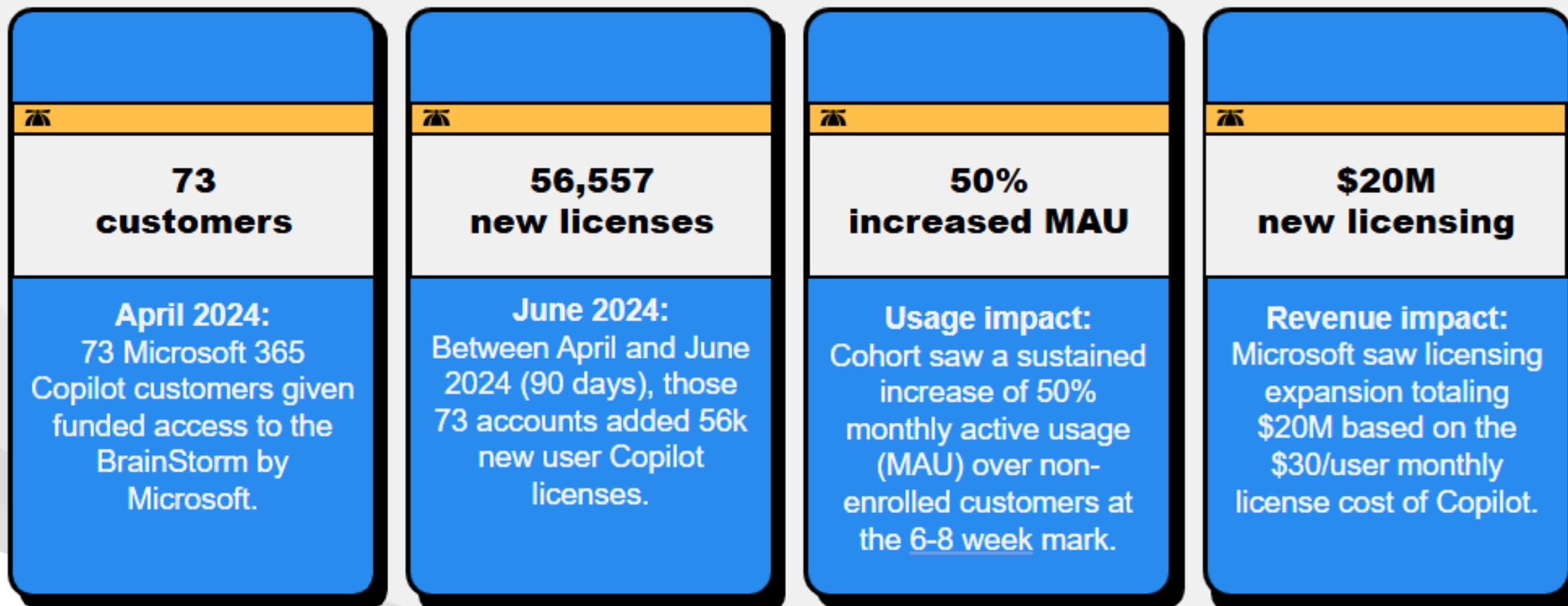
9000+

**customers and partners
certified annually**



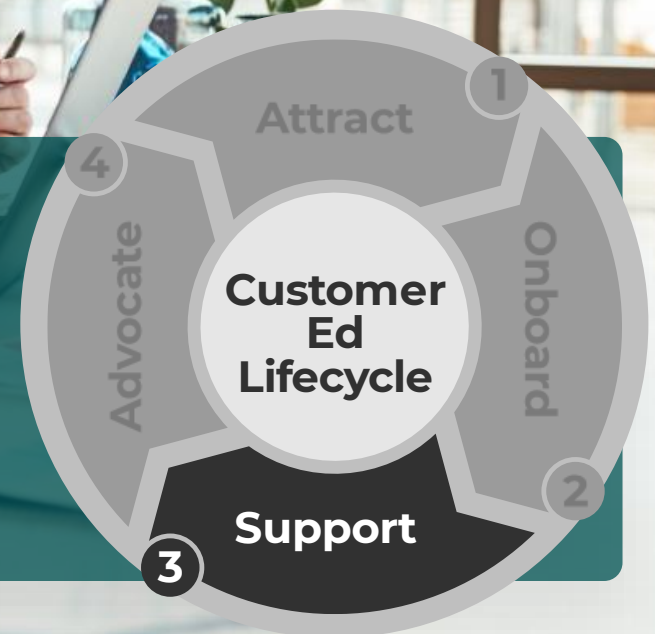
CE Program Drives \$20M in License Expansion in 90 days

Participating 73 account cohort sees marked Microsoft 365 Copilot MAU increase and license expansion after enrollment in BrainStorm-embedded CE program.



SUPPORT CUSTOMERS

Maximize the lifetime customer value of every customer.



Support – Key GTM Impact Metrics



Direct Revenue

- Upsells and cross sells
- Customer retention
- Reduced churn
- Activation rates
- Support calls
- CSAT
- NPS
- Training completions



Support – Content Engagement Ideas

- Advanced training & certifications
- Personalized learning paths
- Peer-to-peer learning
- Community engagement
- User group or community
- Product adoption campaigns
- Gamification & incentive programs
- Chatbot
- Marketing drip campaigns





Overview: SaaS solution that automates payroll, HR, benefits for 400,000 SMB clients

Strategy: Sell personalized training based on customer type and offer courses, certifications and CPEs

Metric: AAR, CPEs, Certifications, NPS

Technology: Intellum, Salesforce

[gusto Website](#) | [Case Study](#)

\$200K

increase in AAR

\$800K

CPE Value

81 NPS

On Flagship Certification



SPS COMMERCE

Overview: SPS Commerce simplifies the retail process by providing cloud-based supply chain software services for suppliers, retailers, third-party logistics providers, and partners.

Strategy: Deliver personalized training to 40K customers to increase product adoption and retention

Metric: Customer Retention

Technology: Gainsight Customer Ed

[SPS Website](#) | [Case Study](#)

$$CLV = \frac{\text{Average Revenue per Customer per Year} \times \text{Gross Margin}}{\text{Churn Rate}}$$

$$\text{Revenue Impact} = \text{New CLV} - \text{Old CLV}$$

30%
increase in
customer retention

DEVELOP CUSTOMER ADVOCATES

Grow, enable and identify advocates to drive leads and sales



Advocate — Key GTM Impact Metrics

- New leads
- Referrals
- Engagement
- Questions answered
- Events attended
- Advocate identification
- Social mentions
- Upsells, cross sells
- New markets



Advocate – Content Engagement Ideas

- Customer certification & ambassador programs
- Customer storytelling (case studies, video testimonials)
- Exclusive access to beta features for engaged learners
- Advocacy rewards (badges, swag, leaderboard rankings)
- Gamified referral programs





UNIVERSITY

Overview: Oracle's learning community, launched within Oracle University, serves as both a support system for learners and a strategic tool to attract new users. The community was built to bridge the gap between formal learning (delivered through their LMS) and informal, peer-driven learning.

Strategy: Blended learning, Q&A, crowdsourcing knowledge,

Metric: Users, discussions, comments, badges, product ideas

Technology: Homegrown

1,000,000

Learners in 1 Year

[Website](#) | [Kris Ann Nansen of Oracle U Interview](#)



Overview: leading American manufacturer specializing in products and solutions that manage and conserve the flow of fluids and energy into, through, and out of buildings.

Strategy: Deployed an incentive and reward program that encouraged contractors to consume a course/content and then get Watt's dollars that can be converted into swag for the job site where the circle continues.

Metric: Revenue, New Customers

Technology: Icentli, Totara LMS

[Website](#) | [Case Study](#)

Customer registrations
surged by over

1500%

New Customers/Year Via
Referral

1000+

Revenue skyrocketed by

\$600M
in just 4 years



LEARN & EARN

- 1 Fast, one-time registration at training.watts.com
- 2 Earn tokens by completing modules
- 3 Redeem tokens for a variety of lifestyle merchandise

Start Earning *FREE* Lifestyle Merchandise Today!

Look at What You Can Earn with Watts Works!
See more great rewards at training.watts.com



Bento Box



Camping Chair



Water Bottle



Expandable Cooler



Hear what other
industry professionals
LOVE about
Watts Learn & Earn



The screenshot shows the Totara user interface. At the top, the navigation bar includes the Totara logo, 'Home', 'Learn', and a user profile for 'Jeff Campbell' with a notification badge showing '15'. Below the navigation bar, the breadcrumb trail reads 'Dashboard / My Learning (Main)'. The main content area features a large 'Refer a Friend' banner with a person icon and a plus sign. A modal window titled 'Refer a friend' is open in the center, containing the text 'Refer a friend and earn coins when they enroll.', a form for 'Your friend's email', 'Send invitation' and 'Cancel' buttons, and a note: 'The intended recipient of the email must have consented.' Below the banner, the user's profile is displayed with a coin balance of 2,410, a 'Spend' button, a 'Leaderboard' button, and a 'Refer a friend' button. The 'Level' section shows 'Level 5' and a progress bar towards 'Next level in 455'. The right sidebar contains sections for 'Last Course Accessed' (Monitoring Performance), 'Latest badges' (No criteria), and 'Upcoming events' (No criteria). The bottom section, 'Current Learning', lists 'Analytical Thinking Foundations' and 'Coaching', both with 'No criteria' buttons.

Refer a friend

Refer a friend and earn coins when they enroll.

Your friend's email

Send invitation Cancel

The intended recipient of the email must have consented.

2,410 Spend

Level 5

Next level in 455

Leaderboard Refer a friend

Info

Monitoring Performance

No criteria

Latest badges

You have no badges to display

Upcoming events

There are no upcoming events

Go to calendar... New event...

Current Learning

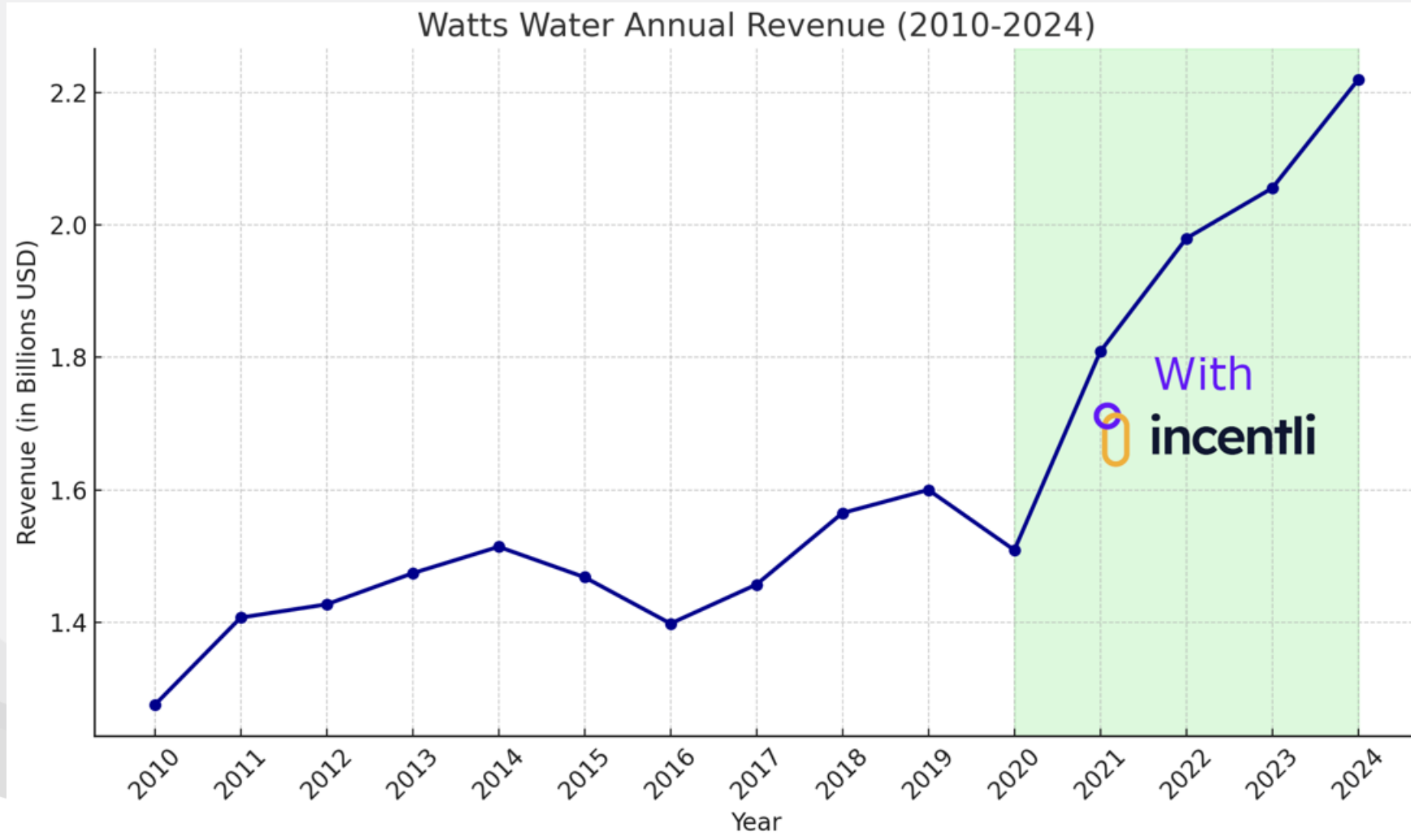
Analytical Thinking Foundations No criteria

Coaching No criteria



*Started using Incentli





Tip #1: Think Like a Revenue Generator

Customer education is about influencing buying decisions, increasing customer lifetime value and reducing churn.

Actionable Steps

1. *Data Shuffle* training progress goals into revenue-driving goals
2. Build relationships with sales, marketing, and customer success teams to understand how education can help attract sales leads, accelerate the sales cycle and expand sales.
3. Learn and use business terms like pipeline acceleration, ARR expansion and retention impact

Tip #2: Get the Business Data!

*Without business data,
you have nothing.*

Actionable Steps

1. Identify the key sources of data in ecosystem -- LMS, CRM, marketing automation, customer success platforms, sales enablement platforms, user communities, other LMS
2. Determine who owns the data and create a strategy to meet and gain access
3. Connect LMS + business data and measure, measure, measure
 - Native LMS integration
 - API connections
 - Data warehouses
 - BI Tools

Tip #3: Data Shuffle, Shuffle, Shuffle

Revenue driven CE leaders focus on financial outcomes. Learner engagement is just the first step in the process.

Actionable Steps:

1. Determine which metrics are most important to your organization
2. Identify current training efforts that could be “converted” to an impact on those metric
3. Create a regular process, routine for measuring
4. Be loud about your success

Tip #4: Monetize Training Where It Makes Sense

Not all customer education should be free.

Paid training can drive direct revenue and position your program as high-value.

Actionable Steps

1. Identify premium learning opportunities (e.g., certifications, advanced courses, or exclusive masterclasses)
2. Use a hybrid model: Free basic training to drive adoption, paid training for in-depth expertise
3. Offer training bundles with product purchases, renewals, or premium support packages
4. Track customer retention and expansion revenue for users who pay for training vs. those who don't

Tip #5: Create Advocates

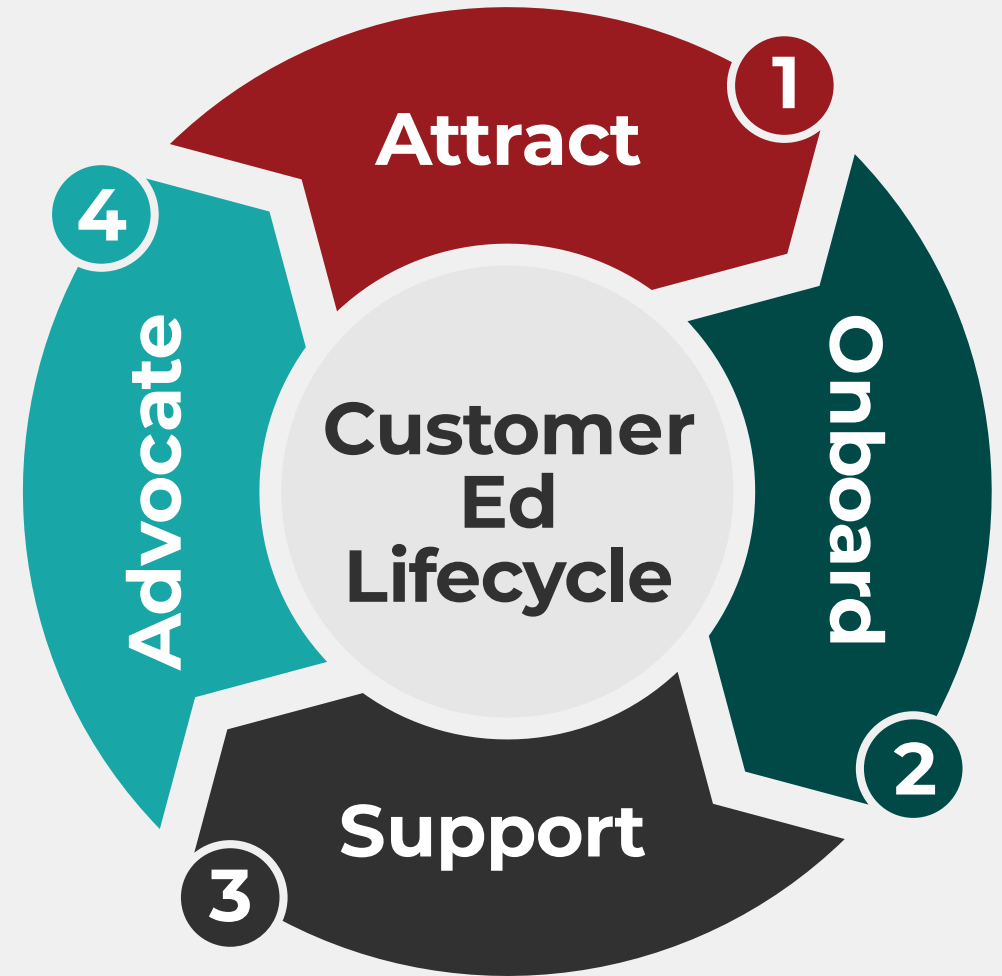
Your best marketing tool is a trained, empowered and vocal customer.

Actionable Steps

1. Study existing user groups to identify potential advocates
2. Develop a certification program that positions customers as industry experts
3. Measure how many certified customers contribute to referrals, case studies, and upsell opportunities.
4. Recognize top learners and advocates in customer communities to drive organic word-of-mouth growth.

Final Takeaways

- The GTM mindset is a way to transform from cost center to GTM
- Opportunities to link to and drive revenue at every stage of the customer lifecycle
- Driving revenue never goes out of style
- Be indispensable
- Be loud about it



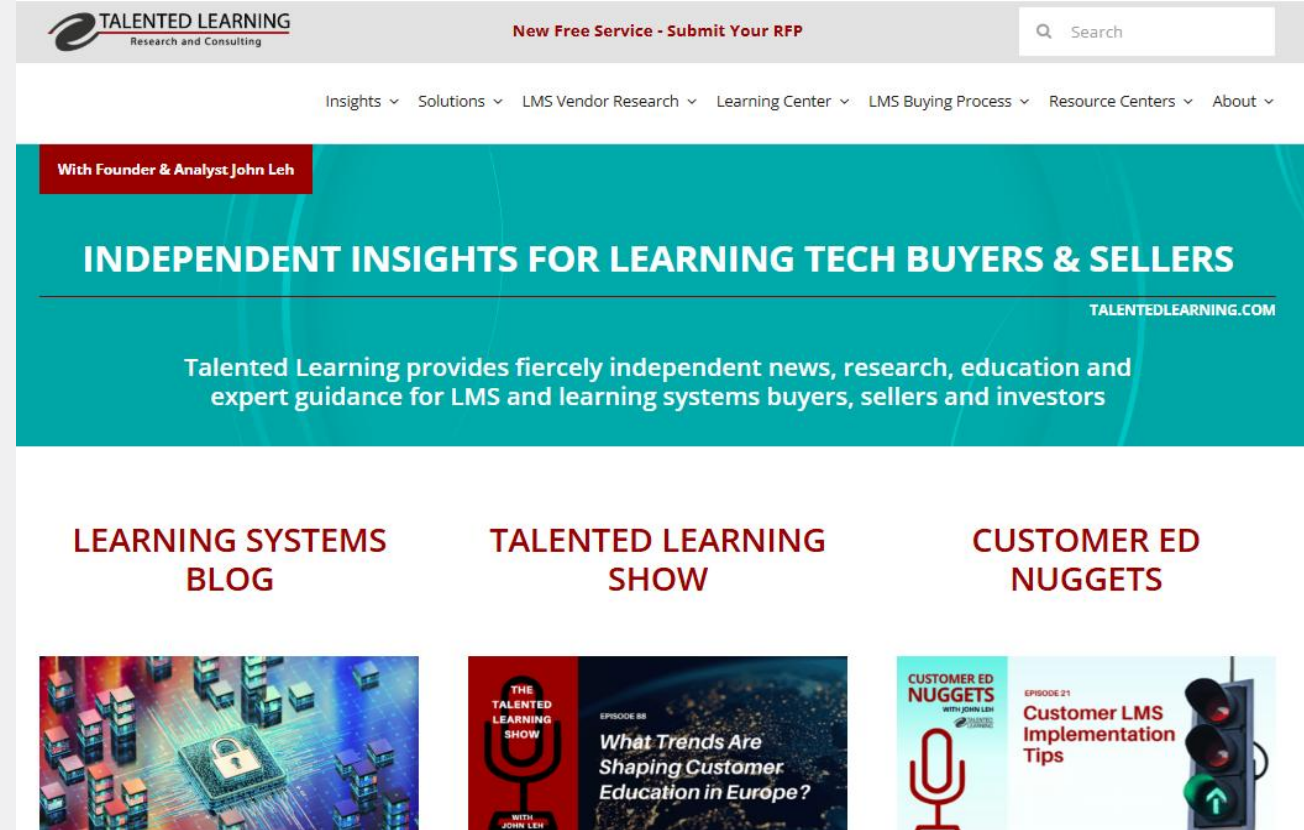
About Talented Learning

Learning tech independent research, analyst and consulting firm

- Founded in 2014 by John Leh
- Focus on the business of learning
- Cover hundreds of LMS and learning systems
- Helped organizations find their best LMS

Thought Leadership Content:

- [Learning Systems Blog](#)
- [The Talented Learning Show Podcast](#)
- [Customer Ed Nuggets Podcast](#)
- [Customer Ed LMS Capabilities Report](#)



The screenshot shows the Talented Learning website. At the top is the logo and a navigation bar with links like Insights, Solutions, LMS Vendor Research, Learning Center, LMS Buying Process, Resource Centers, and About. A search bar is on the right. Below the navigation is a teal banner with the text "INDEPENDENT INSIGHTS FOR LEARNING TECH BUYERS & SELLERS" and "Talented Learning provides fiercely independent news, research, education and expert guidance for LMS and learning systems buyers, sellers and investors". Below the banner are three sections: "LEARNING SYSTEMS BLOG" with a server rack image, "TALENTED LEARNING SHOW" with a podcast cover for "What Trends Are Shaping Customer Education in Europe?", and "CUSTOMER ED NUGGETS" with a podcast cover for "Customer LMS Implementation Tips".

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Thank You! Questions?

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