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From Core Metrics to Impact Metrics

Creating ROI for Customer Education

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Tom Studdert

Vice President,
Customer Support & Education

Therapy Brands

Agenda

01. Welcome & Introduction
02. The Evolution of Your Customer Education
03. Customer Education ROI Matters
04. Align Metrics with Maturity Level
05. The Link Between Customer Education & ROI
06. Case Study in ROI
07. Final Thoughts
08. Q&A | Discussion

Introduction

I Started in the Classroom.

My Background.

- All three degrees in Education
- Focus on Learning Theory
- 20+ years working in Higher Education
- Orientation & First-Year Experience
- Adjunct Professor

Pivoted to Tech.

- Transitioned to Tech in 2015
- First role was to build out employee learning & development and sales enablement function at DiscoverOrg (ZoomInfo)
- Within 4 months, was asked to build out customer education program

Since Then.

- Three SaaS companies: ZoomInfo, Payscale, Therapy Brands
- Oversaw/oversee multiple areas of the customer lifecycle
- Customer Education always in portfolio
- Currently manage support & education

And Pivoted Into Tech.

zoominfo

The Company

- Established in 2001 | Acquired in 2019
- Go-To-Market Intelligence Platform
- Sales, Marketing, Talent, Operations
- 35K customers and over 350K users
- IPO in 2020

My Role

- Vice President, Customer Onboarding & Education

payscale

The Company

- Established in 2002
- Compensation software and services
- HR, Compensation, Employees/Job Seekers
- 20K customers
- Private Equity: Francisco Partners

My Role

- Senior Vice President, Customer Experience

Therapy Brands

The Company

- Established in 2013
- End-to-end solution for mental and behavioral health professionals
- 200K therapists | 20,000 practices
- Private Equity: KKR

My Role

- Vice President, Customer Support & Education

The Evolution of Your Customer Education

Your Maturity Matters.

Customer Education ROI Matters

Create Strategic V.A.L.U.E.

Vision . Advise . Lead . Utilize . Experience .

Create Strategic V.A.L.U.E.

Vision.

Create a dynamic plan, using your experience, imagination, knowledge, and wisdom to guide the customer on the path toward the best possible manifestation of their desired outcomes.

Advise.

Use your voice and empathy to represent our customers to internal stakeholders, moving forward their initiatives and always acting in their best interest.

Lead.

Make sure that the customer always knows what is next in their journey, and give them the tools they need to be successful.

Utilize.

Be the mastermind behind their Customer Journey and their experience. Create a program that is customized for every customer and that is positioned to serve their specific needs, structure, and use cases.

Experience.

Create an experience that meets and exceeds the needs of the customer.

Customer education isn't just training.

It's an investment in the long-term success of the customer and the company.

And Drive Business Impact.

1 

Tactical Adoption
What are the key things that must be completed for a customer to use your product(s)?

2 

Functionality Adoption
What are the foundational functions and where are they accessed in your product(s)?

3 

Feature Adoption
What are the primary features across your product(s) that enable a customer to do his/her/their job?

4 

Workflow Adoption
How does the customer put all of the components together to automate their day to day using your product(s)?

5 

Full ROI
Is the customer maximizing the full suite and is he/she getting ultimate value out of the functions, features, and workflows?

Strategic Value + Business Impact.

Training = Retaining.

- Increased Product Adoption
- Drive upsell/cross-sell opportunities
- Enhance Retention
- Reduce Churn

Align Metrics with Maturity Level

Train Your Customers.

Help customers get value, faster.

Train Your Customers 1

Primarily live training & person-to-person interactions.

Overview

Train Your Customers

- Delivered primarily live
- ILT
- VILT
- Basic record keeping

Imperatives

Strategic

- Win executive support
- Make learning content digital
- Measure satisfaction

Metrics

Core

- Number of trainings offered.
- Number of accounts trained.
- Number of users trained.

Build Foundation for Scale.

Free team bandwidth for more strategic work..

Build Foundation for Scale 2

Learning platforms to free success, support, and learning teams.

Overview

Foundation for Scale

- Digital foundation for learning
- Investment in e-learning
- On-demand content

Imperatives

Strategic

- Launch LMS
- Streamline content
- Reduce friction for SMEs

Metrics

Satisfaction

- Smile sheets
- Evaluations
- CSAT
- NPS
- Qualitative surveys

Personalize Learning.

Increase product adoption and customer success.

Personalize Learnings 3

Persona-based learning with content to allow for more efficiency.

Overview

Personalize Learning

- Strategic and personalized learning
- Persona based learning and training

Imperatives

Strategic

- Persona-based user journeys, built around customer pain points
- Establish push and pull learner strategy
- Develop subscription content

Metrics

Engagement

- How often learners engage with content
- Time on task
- Completion of learning content (courses, etc.)
- Registrant vs participant data

Deliver Business Impact.

Demonstrate program value and unlock investment for innovation and growth.

Deliver Business Impact 4

Quantify performance gains to make the case for investment.

Overview

Business Impact

- Shift from user impact to business impact
- Impacting business metrics across the customer journey

Imperatives

Strategic

- Measure the impact of learning on business KPIs
- Source learning from experts, partners, and community
- Use learning to enable internal teams

Metrics

Usage

- Product adoption
- Product usage
- Relationship between training and usage (trained vs untrained users)

Elevate the Brand.

Supercharge demand generation.

Elevate the brand 5

Market-facing learning offerings strengthen ownership of your category.

Overview

Brand Elevation

- Focus on innovation
- Go beyond your customers to the larger market

Imperatives

Strategic

- Launch public-facing learning to generate demand
- Use of thought leadership as a part of education
- Define and measure EQLs (education-qualified leads)

Metrics

Impact

- Correlation to renewals and retention
- Correlation to upsells and cross-sells
- Demand generation (EQL)

The Link Between Customer Education & ROI

What is ROI in Customer Education?

Quite simply: the financial return on investing in education.

Key Metrics

- Customer retention rates
- Increase product usage
- Decreased churn
- Customer lifetime value
- Upsell & cross-sell opportunities
- NPS & CSAT

Customer Education Impacts ROI.

But how?

FASTER ONBOARDING

Reduces time to value for customers leading to quicker ROI.

HIGHER PRODUCT USAGE

Educated customers use the product more effectively and frequently.

REDUCED CHURN

Training increases product engagement decreasing the likelihood of churn.

SELF-SERVICE SUPPORT

Fewer support tickets, saving time and operational costs.

Building a CE Program to Drive ROI.

Steps to a successful program.

1 **Define Goals & Objectives**

Align education initiatives with business objectives..

2 **Create Engaging Content**

Develop varied resources like videos, webinars, courses, and FAQs.

3 **Target the Right Audiences**

Tailor education to your customer segments and personas..

4 **Offer Personalized Learning**

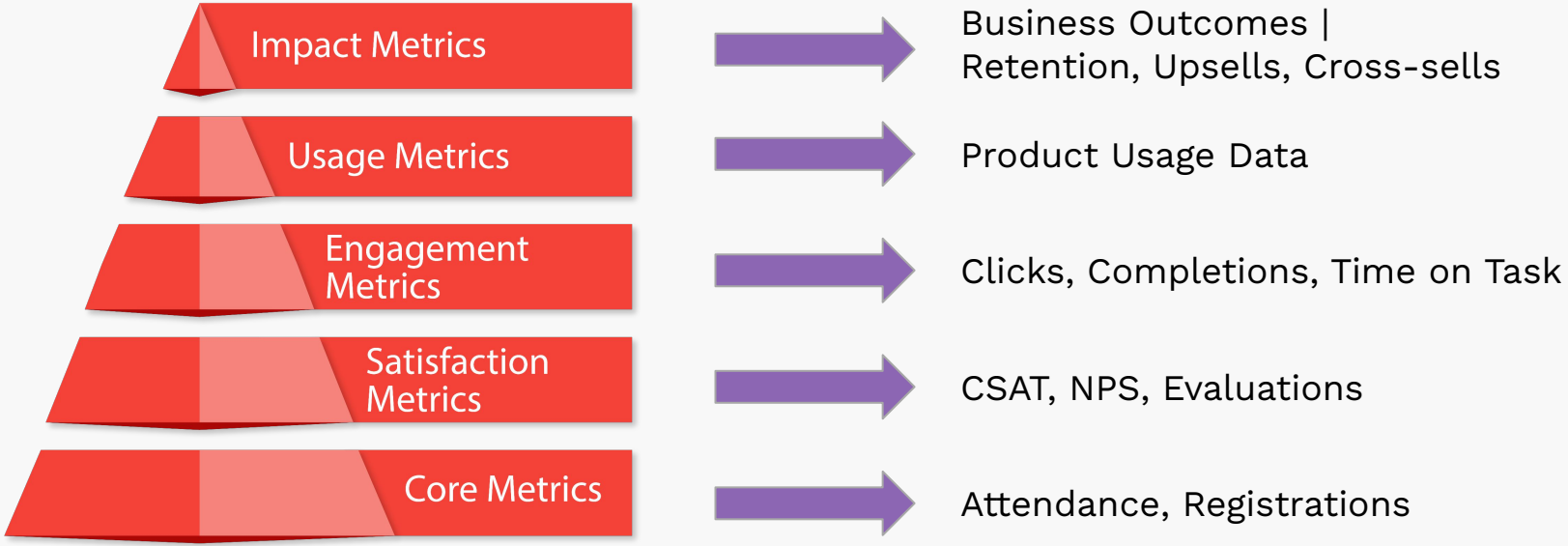
Provide customized learning that meets the needs of the customer.

5 **Leverage Technology**

Use LMS to track progress and BI tools to correlate data.

Tracking and Reporting ROI.

Utilize data.



Quantify ROI.

Link education to revenue.

Customer per Training vs Benefit

Calculate the cost of delivering education compared to the value it brings (increased revenue, decreased churn, reduced support costs)

Customer Lifetime Value (CLV)

Demonstrate how education programs can increase CLV by improving customer satisfaction, retention, and product usage.

Showcase how education leads to upsells, renewals, and referrals.

Case Study in ROI

How ZoomInfo Grew Customer Education

ZoomInfo CE Grew Due to ROI.

But it took time.

2015

Team Members.

3

Tech Stack.

2023

Team Members.

57

Tech Stack.

We Built an Adoption Framework.

This framework allowed us to think about what to measure and when.

1

Tactical Adoption
What are the key things that must be completed for a customer to use ZoomInfo?

2

Functionality Adoption
What are the foundational functions and where are they accessed in ZoomInfo?

3

Feature Adoption
What are the primary features across ZoomInfo that enable a customer to do his/her job?

4

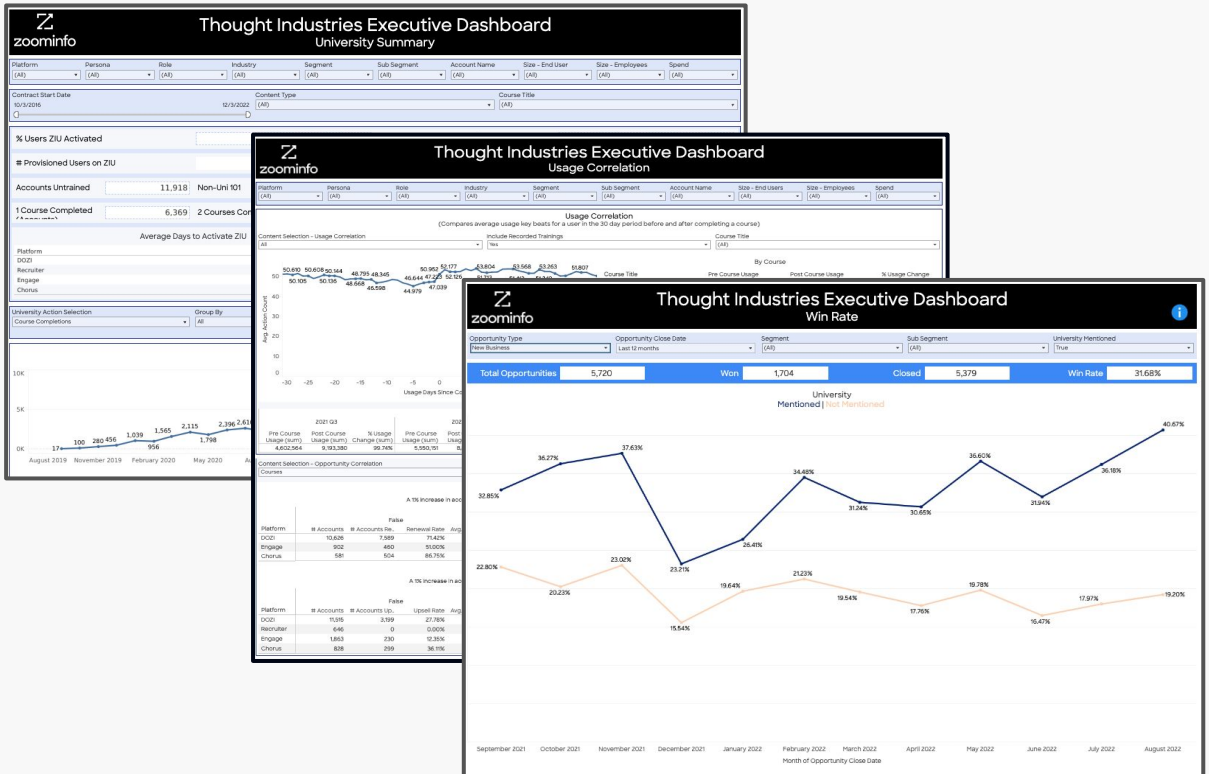
Workflow Adoption
How does the customer put all of the components together to automate their day to day using ZoomInfo?

5

Full ROI
Is the customer maximizing the full suite and is he/she getting ultimate value out of the functions, features, and workflows?

We Built Executive Dashboards.

Proved out a correlation with usage, renewals, upsells, and win-rates.



EXECUTIVE DASHBOARD

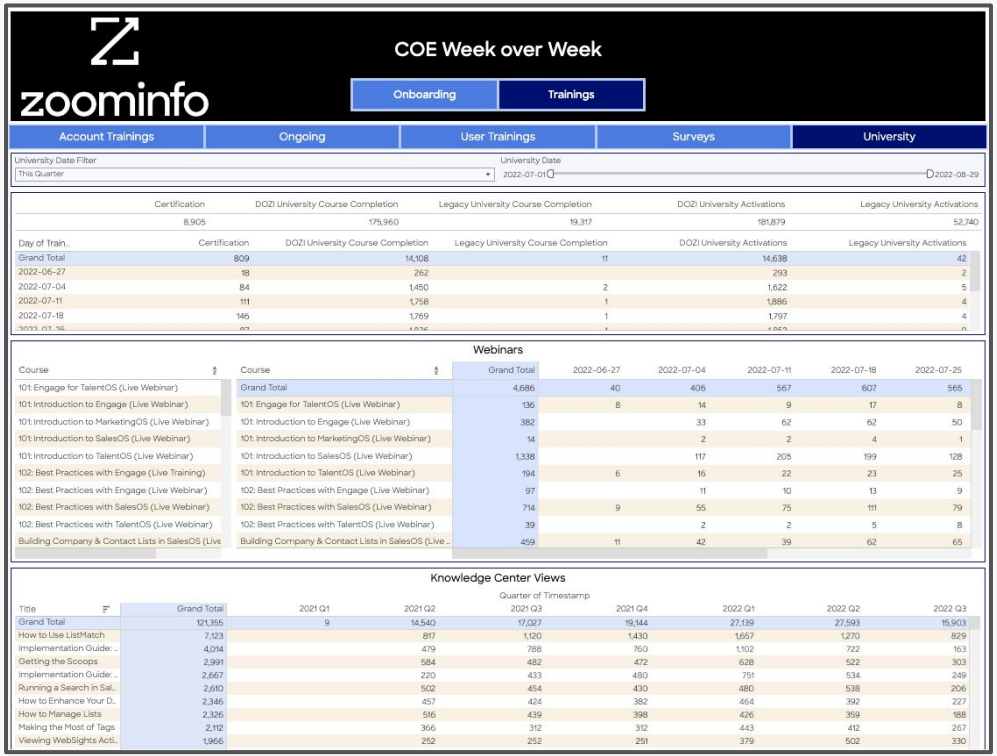
- Correlation to platform usage
- Correlation to renewal and upsell
- Correlation to win-rate
- Activation stats (account & user)
- Login stats (user)
- Course completion stats

10-12% | Renewals

4-6% | Upsells

We Built Weekly Dashboards.

Allowed the team to track key training stats across all educational offerings.



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COE Week over Week

Onboarding | Trainings

Account Trainings | Ongoing | User Trainings | Surveys | University

University Date Filter: This Quarter

University Date: 2022-07-01 – 2022-08-29

	Certification	DOZI University Course Completion	Legacy University Course Completion	DOZI University Activations	Legacy University Activations
	8,905	175,960	19,317	181,879	52,740

Day of Train..	Certification	DOZI University Course Completion	Legacy University Course Completion	DOZI University Activations	Legacy University Activations
Grand Total	809	14,108	11	14,638	42
2022-06-27	18	262		293	2
2022-07-04	84	1,450	2	1,622	5
2022-07-11	111	1,758	1	1,886	4
2022-07-18	146	1,769	1	1,797	4

Webinars

Course	Course	Grand Total	2022-06-27	2022-07-04	2022-07-11	2022-07-18	2022-07-25
101: Engage for TalentOS (Live Webinar)	Grand Total	4,686	40	406	567	607	565
101: Introduction to Engage (Live Webinar)	101: Engage for TalentOS (Live Webinar)	136	8	14	9	17	8
101: Introduction to MarketingOS (Live Webinar)	101: Introduction to Engage (Live Webinar)	382		33	62	62	50
101: Introduction to SalesOS (Live Webinar)	101: Introduction to MarketingOS (Live Webinar)	14		2	2	4	1
101: Introduction to TalentOS (Live Webinar)	101: Introduction to SalesOS (Live Webinar)	1,338		117	205	199	128
102: Best Practices with Engage (Live Training)	101: Introduction to TalentOS (Live Webinar)	194	6	16	22	23	25
102: Best Practices with Engage (Live Webinar)	102: Best Practices with Engage (Live Webinar)	97		11	10	13	9
102: Best Practices with SalesOS (Live Webinar)	102: Best Practices with SalesOS (Live Webinar)	714	9	55	75	111	79
102: Best Practices with TalentOS (Live Webinar)	102: Best Practices with TalentOS (Live Webinar)	39		2	2	5	8
Building Company & Contact Lists in SalesOS (Live	Building Company & Contact Lists in SalesOS (Live ..	459	11	42	39	62	65

Knowledge Center Views

Quarter of Timestamp

Title	Grand Total	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3
Grand Total	121,355	9	14,540	17,027	19,144	27,139	27,593	15,903
How to Use ListMatch	7,123		817	1,120	1,430	1,657	1,270	829
Implementation Guide: ..	4,014		479	788	760	1,102	722	163
Getting the Scoops	2,991		584	482	472	628	522	303
Implementation Guide: ..	2,667		220	433	480	751	534	249
Running a Search in Sal..	2,610		502	454	430	480	538	206
How to Enhance Your D..	2,346		457	424	382	464	392	227
How to Manage Lists	2,326		516	439	398	426	359	188
Making the Most of Tags	2,112		366	312	312	443	412	267
Viewing WebSights Acti..	1,966		252	252	251	379	502	330

COE WEEK OVER WEEK

- Account & User training data
- Weekly data on course completions
- Weekly data on certification completions
- VILT Attendance
- Knowledge Center Views
- Tied back to SFDC Account & Contact Record

Final Thoughts

Customer Education is a Strategic Investment.

Show the impact on customer success and business growth.

1. Customer education is a long-term investment.
2. Core and satisfaction metrics don’t tell the whole story.
3. Impact metrics drive meaningful business outcomes.
4. Align education program with business goals and track the right metrics to prove success.

The 5 Stages Take Time.

Understand where you are in your journey and push to the next level.

Nothing happens overnight, so **be patient** and accept you're on a journey. At ZoomInfo, a **1% increase** in university activity drove **66 additional users** through upsell. A **1% increase** in accounts who are actively engaging with education content drove the user-base by **52 new renewals**. That's not what it was like at the start! Set the vision. Track the **metrics**. Present your case. Show the **ROI**.

Q & A | Discussion

tom.studdert@therapybrands.com

linkedin.com/in/thomaspstuddert

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Thank You!

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