

# Customer Education Metrics: **Measurement** and **Interpretation**



- From activity data to actionable adoption signals



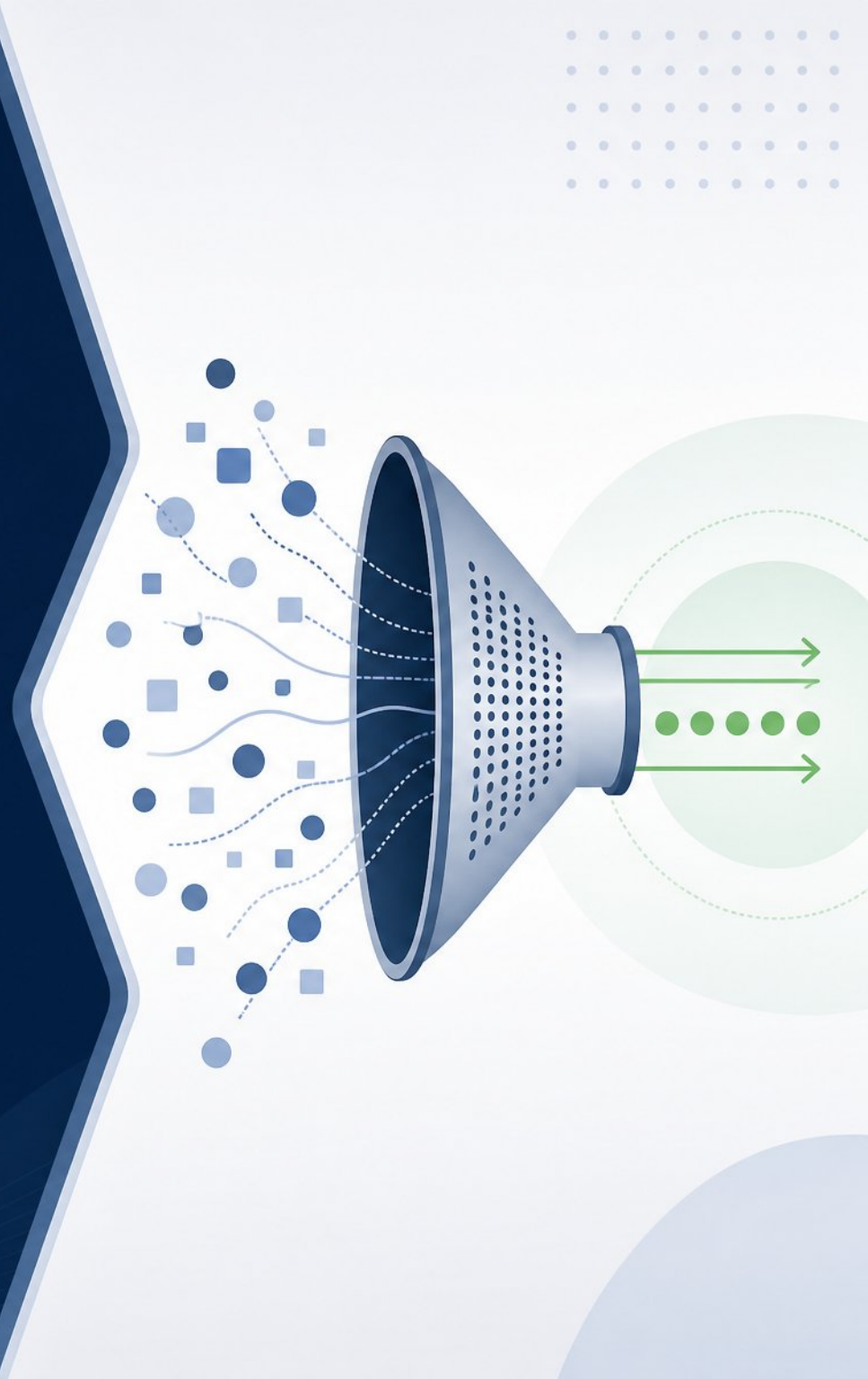
- Core challenge: distinguishing activity from value signals



- Three metric tiers: engagement, behavior change, business impact



- Progression: from measurement to interpretation to action



# Why Completion Rates Mislead Leaders



- Completion measures attendance, not competence, retention, or behavior change



- High completion can coexist with unchanged product usage



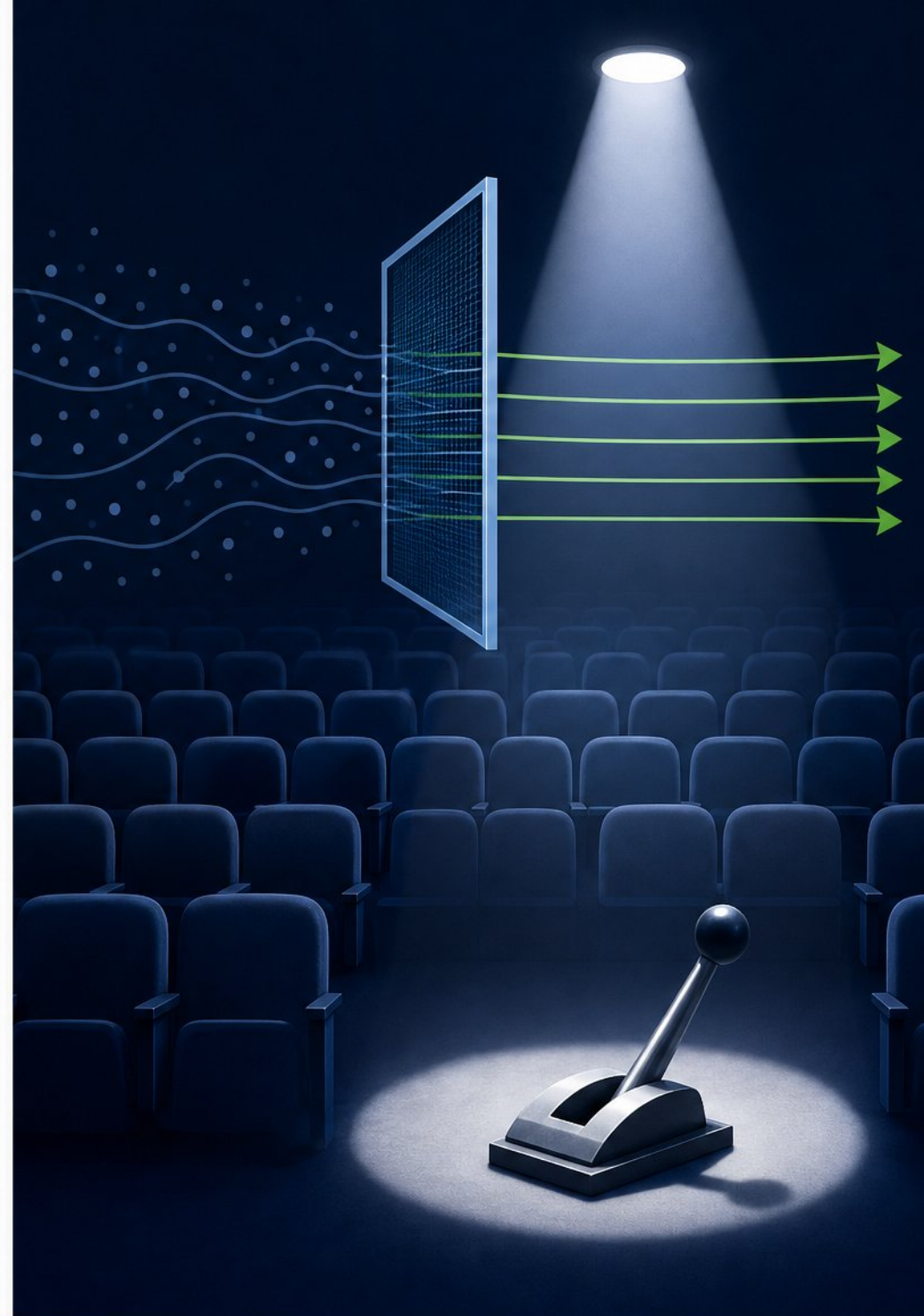
- Completion is a compliance metric, not a performance metric



- Easy-to-pull LMS data displaces useful outcome data



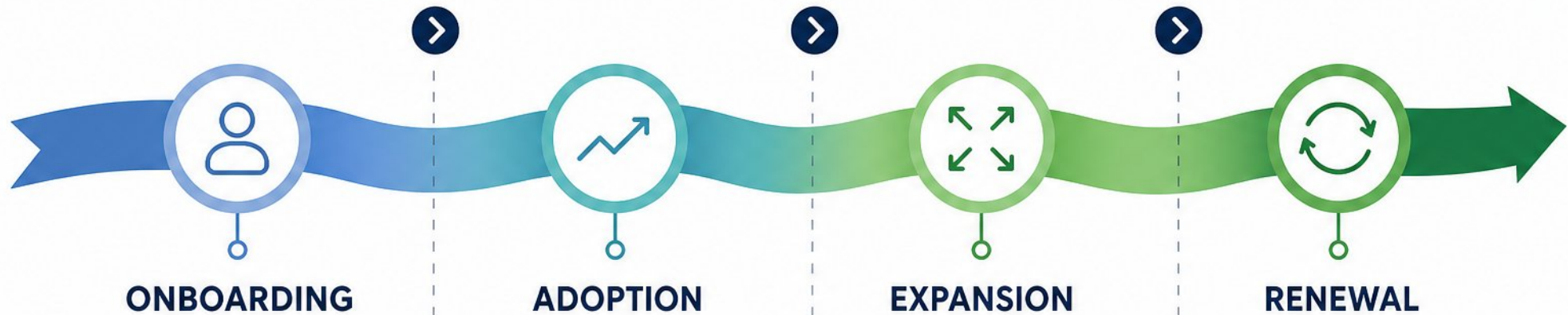
- Vanity metrics: visible, but disconnected from real business value



# The Three Tiers of Customer Education Metrics



# Mapping Metrics to the Customer Lifecycle



- ✓ Align metrics to lifecycle stages: onboarding, adoption, expansion, renewal
- ✓ Connect learning data to health scores for a coherent CS read
- ✓ Use a metrics maturity model to level-set your program
- ✓ Each stage answers a distinct question and needs its own metric
- ✓ Stage 4 maturity: education appears on CEO dashboards

# Activation and Adoption Signals That Predict Retention



- Track moment-of-value: first build, report, or workflow



- Certifications link to feature adoption lifts and usage



- Time-to-first-value (TTV): shared leading indicator



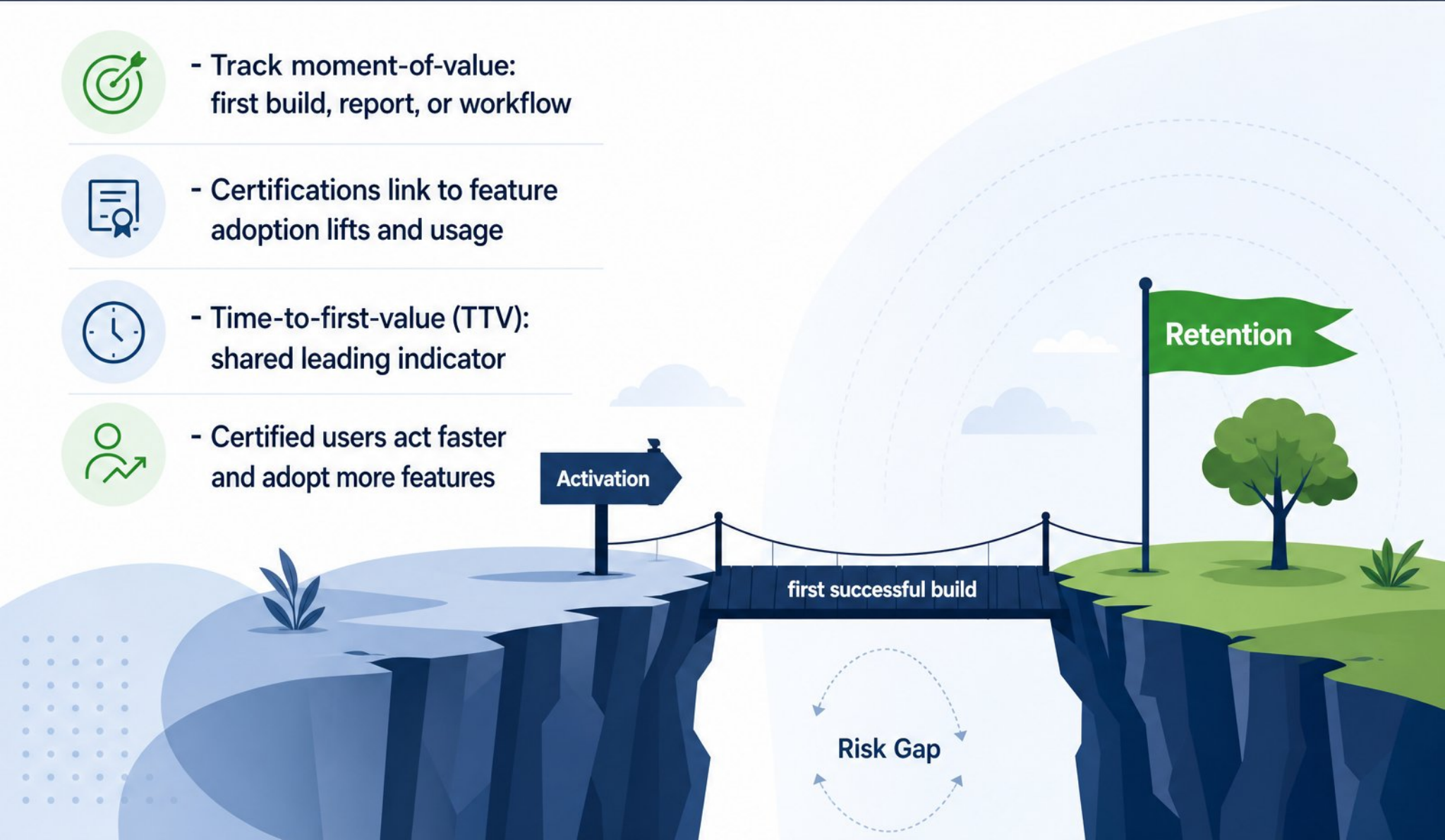
- Certified users act faster and adopt more features

Activation

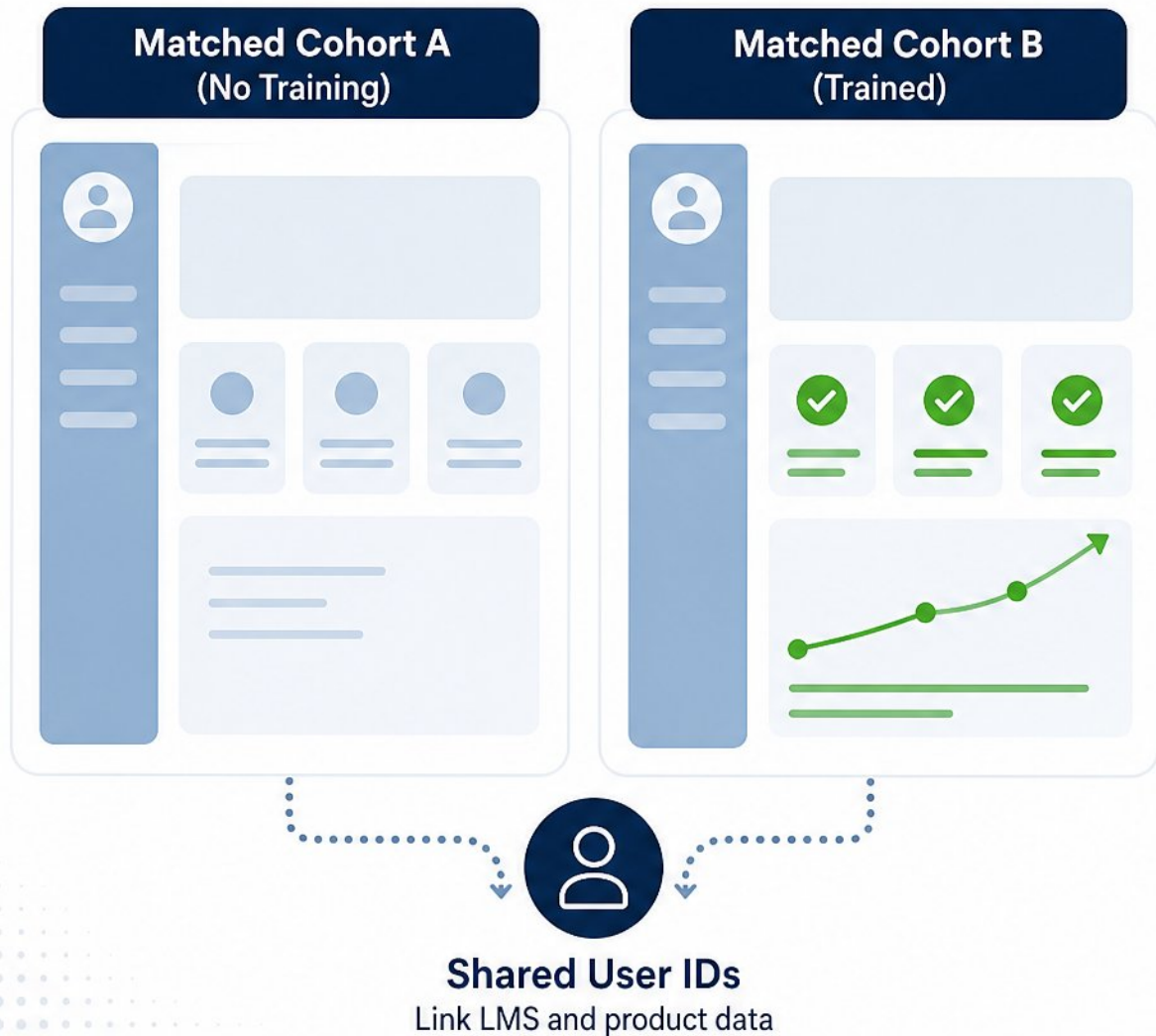
first successful build

Risk Gap

Retention



# Linking Course Completions to Product Adoption



- KIN ESSO: 900% more certifications, 44% faster time-to-value



- Quickbase: 86% renewal rate for trained customers



- Certifications raise key action rates 3x

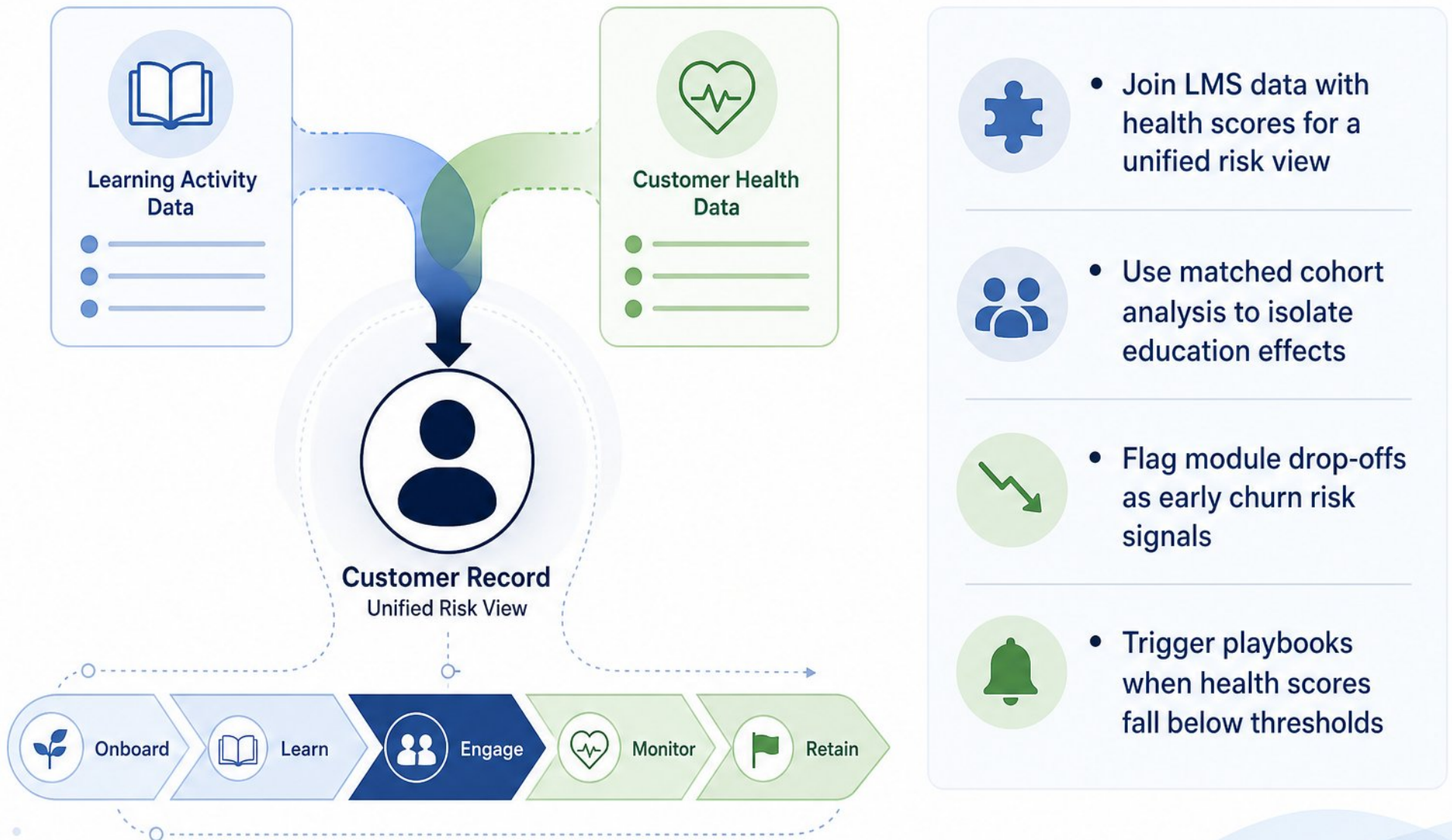


- Link LMS and product data with shared user IDs



- Align every course to a measurable product milestone

# Correlating Learning Data with Customer Health



# Building a Defensible Cohort Analysis



- Define cohort anchors; match educated and non-educated accounts on ARR and lifecycle stage



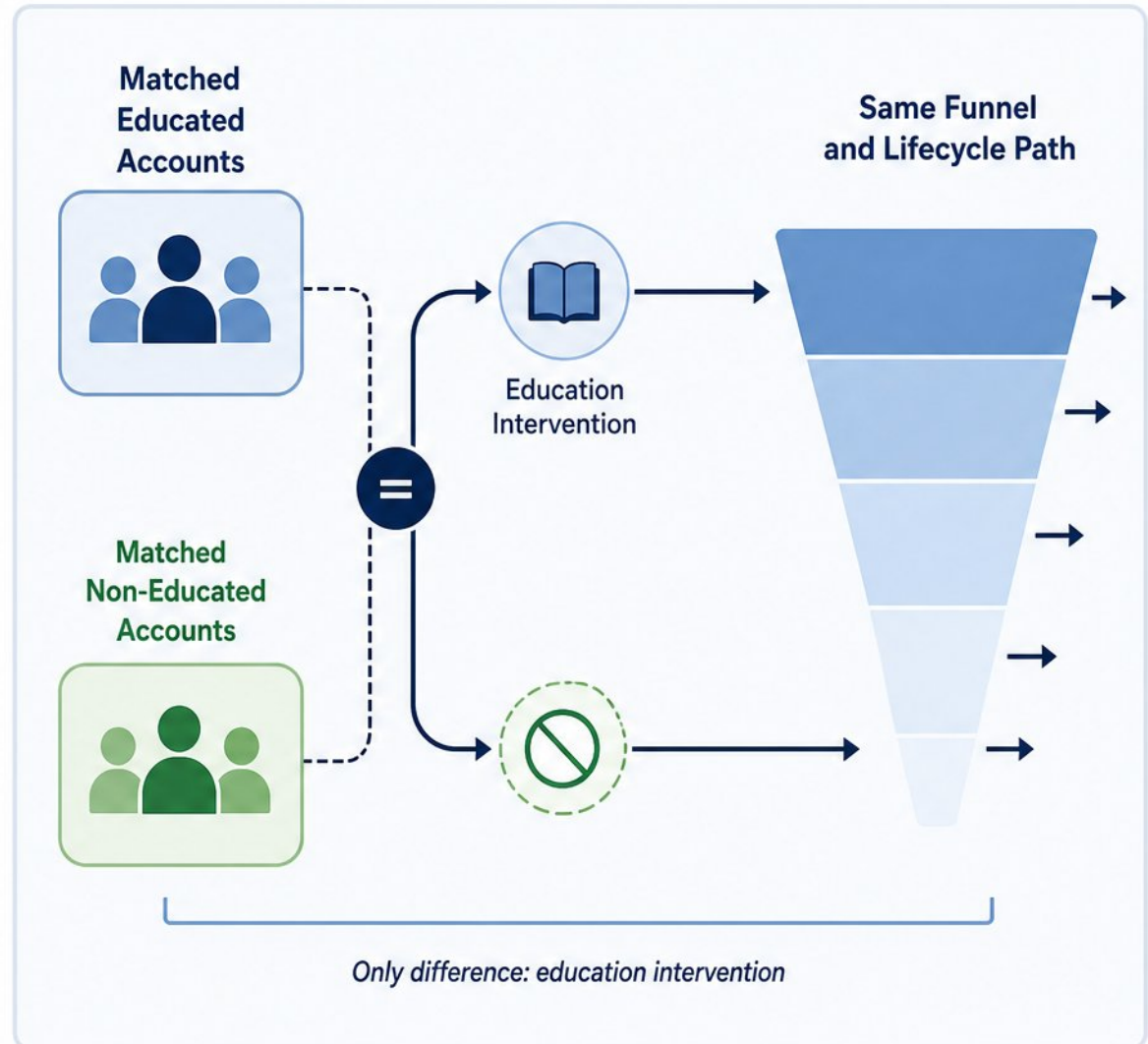
- Apply bias controls: matched cohorts, timing controls, propensity scoring



- Convert outcome lifts into credible ROI inputs for finance-ready reporting



- Measure behavior changes, not just course completions, in the target cohort





# Selecting the Metrics That Matter



- Pick 3-5 metrics tied to board priorities



- Avoid drowning stakeholders in numbers



- Leading indicators forecast; lagging confirm outcomes



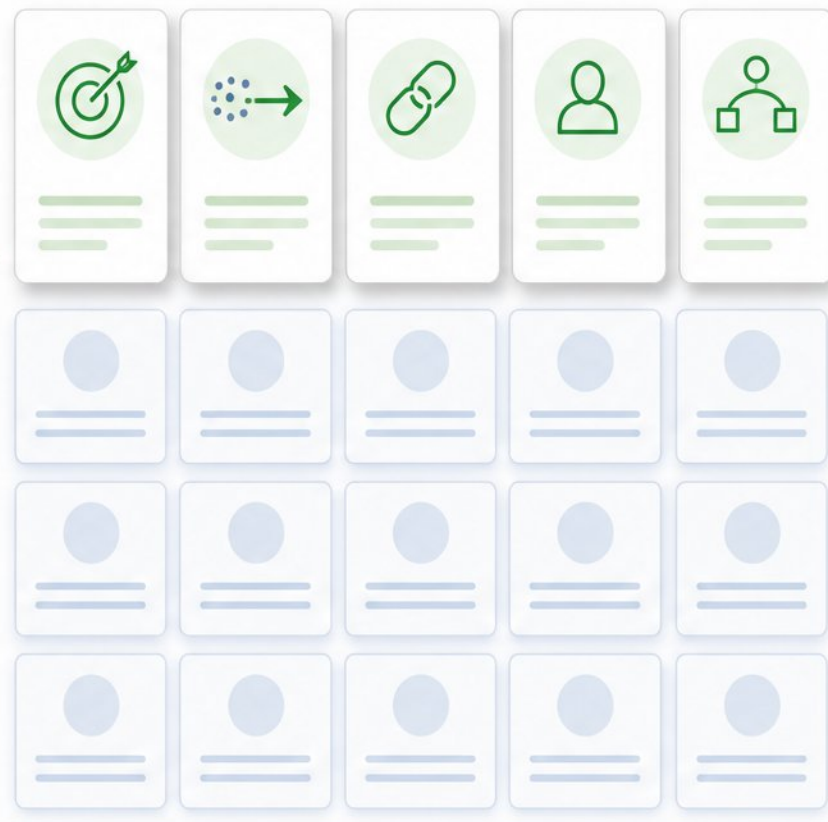
- Link completion and adoption to retention



- Every metric needs an owner and a decision



## PRIORITY METRICS



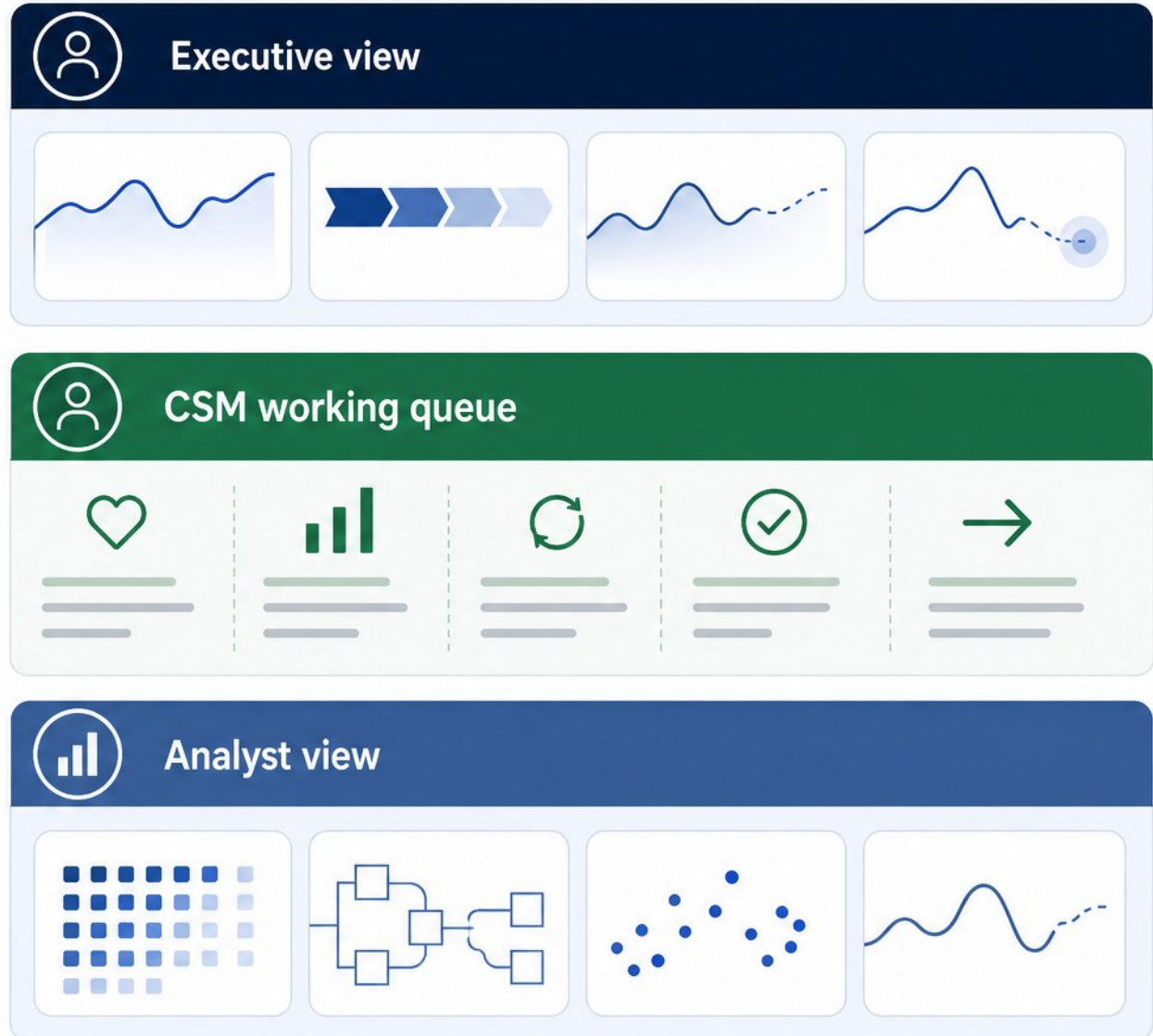
# Interpreting Data: From Analysis to Action

- Diagnose: check for agreeing, contradicting, or regressing signals
- Trigger playbooks for falling engagement, stalled adoption, rising support volume
- Speak revenue, risk, and cost to stakeholders

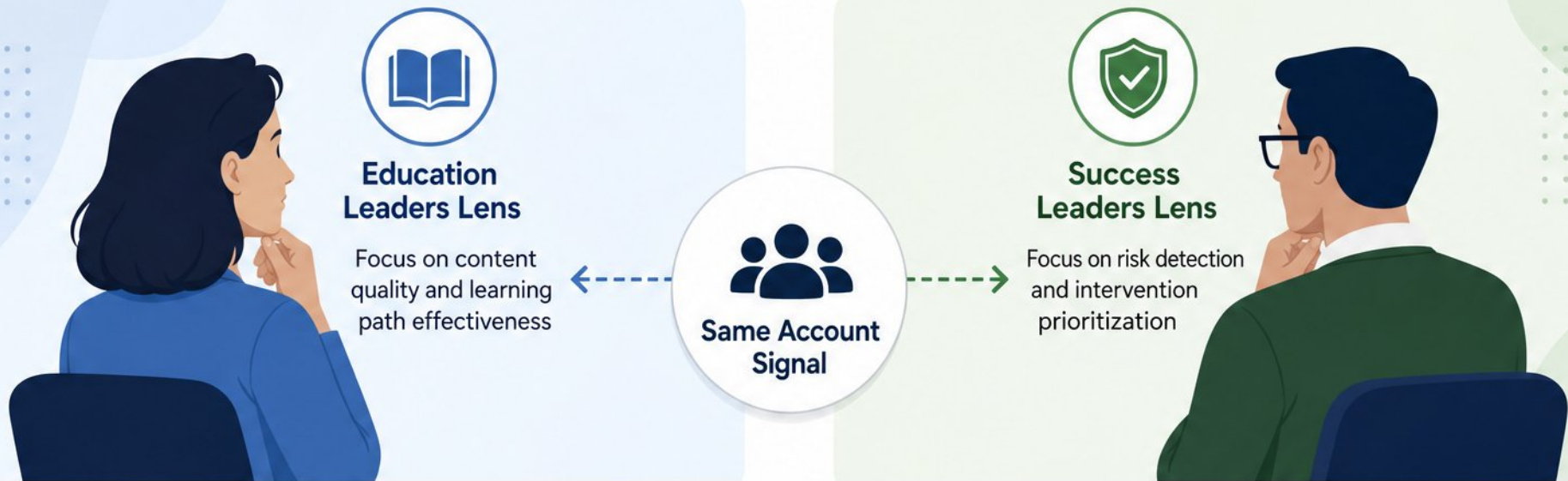


# Designing Dashboards and Reporting Cadence

- Executive view: NRR, churn, renewal pipeline, revenue at risk
- Monthly/quarterly: focus on exposure and trend
- CSM working queue: health, adoption, renewal status, next action
- Daily: prioritize which account needs action now
- Analyst view: cohorts, metric lineage, score validation
- Bi-weekly: test which signals predict outcomes
- Every metric needs an owner, threshold, and documented next action



# Role-Specific Interpretations and Shared Language



-  - Education leaders: content quality, drop-off fixes, learning path effectiveness
-  - Success leaders: account segmentation, risk detection, intervention prioritization
-  - Align on behavior and outcome metrics — not activity data
-  - One shared vocabulary between Education and Success

# Making Customer Success Segmentation Work with Learning Behavior



- Segment by learning behavior, adoption, and risk, not firmographics alone



- Route at-risk accounts to intervention playbooks by risk tier



- Automate triggers: re-engagement, training outreach, expansion talks



|                |        | Learning Behavior                                                                             |                                                                                                   |                                                                                                |
|----------------|--------|-----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
|                |        |  Low       |  Medium        |  High       |
| Adoption Level | High   |            |                |             |
|                | Medium |            |                |             |
|                | Low    |          |              |           |
|                |        |  High Risk |  Medium Risk |  Low Risk |

# Immediate Priorities and Next Steps



**Audit current metrics;  
stop reporting vanity numbers**



**Set up first cross-functional  
review between Education and CS**



**Commit to a pilot cohort  
to test the interpretation model**



**Establish a baseline  
before scaling**



**Link every metric to  
a decision and owner**

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