

Customer Education Platform: Selection, Architecture, and Tradeoffs



2026: customer education is a growth lever for retention, adoption, and expansion



Platform choice, content, data, operating model, and commercials are one joint decision



Covers requirements, build-vs-buy, architecture, analytics, POC, TCO, rollout, risk



Deliverables: scored shortlist, architecture blueprint, 3-year TCO, tradeoff register



Roles: education leads, CS ops, enablement/L&D, IT and procurement each own a piece



The Business Case and the Decision You Are Actually Making



Education is measured on outcomes, not attendance: adoption, retention, expansion, NRR



The benchmark evidence: ~7–22% retention lift, ~20–38% adoption, ~15% support savings



Maturity gap: 44% treat education as a growth lever, only 19% have the foundation



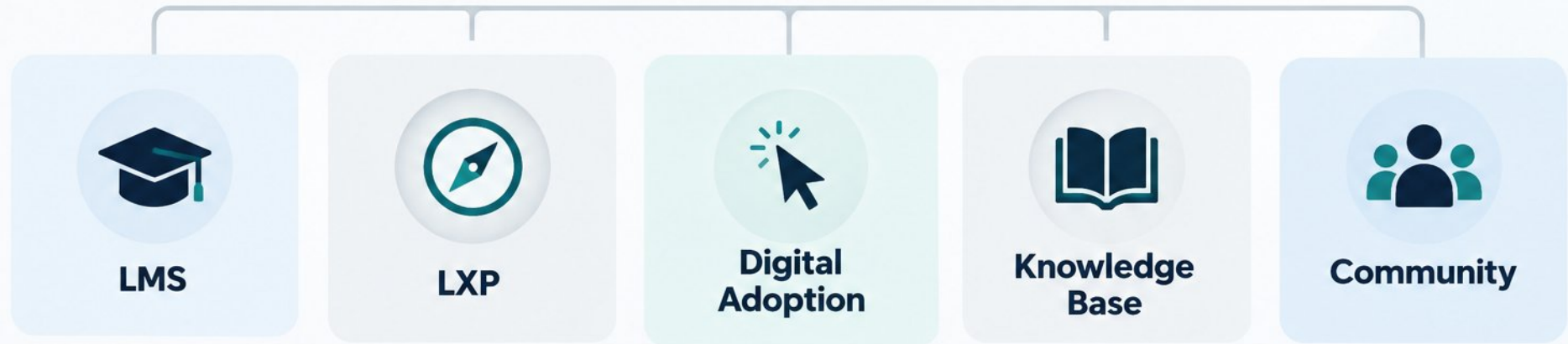
Failure pattern: retention is the goal, yet spend stays in onboarding



One joint decision across four teams — not four separate purchases



Platform Categories: LMS, LXP, Digital Adoption, Community, and Knowledge Base



- > LMS administers and tracks; LXP drives discovery and self-directed engagement
- > DAP delivers in-product guidance; knowledge base answers; community handles peer learning
- > External learners self-enroll, lack corporate email or managed device, judge login friction
- > Most expensive error: employee LMS or course-commerce tool for a B2B academy
- > Multi-audience needs isolated tenants, not a logo swap on one shared user database



Translating Business Goals into Testable Requirements

CLEARER
REQUIREMENTS
STRONGER OUTCOMES

Business Goals (start here)



time-to-value



adoption



deflection



renewal



Requirement Gate



Work backwards from a named metric: time-to-value, adoption, deflection, renewal



Tag every requirement must-have, should-have, or nice-to-have



Keep must-haves to 5–8; if all are critical, none are



Testable Requirements



Functional needs must be specific and testable, not category labels



Non-functional needs drive cost: SSO, SCIM, RBAC, audit logs, residency, SLA



Accessibility: name WCAG 2.2 AA plus a dated ACR on VPAT 2.5Rev

FROM STRATEGY TO VALIDATION

Build vs. Buy vs. Compose: Archetypes, Fit Patterns, and Where AI Fits

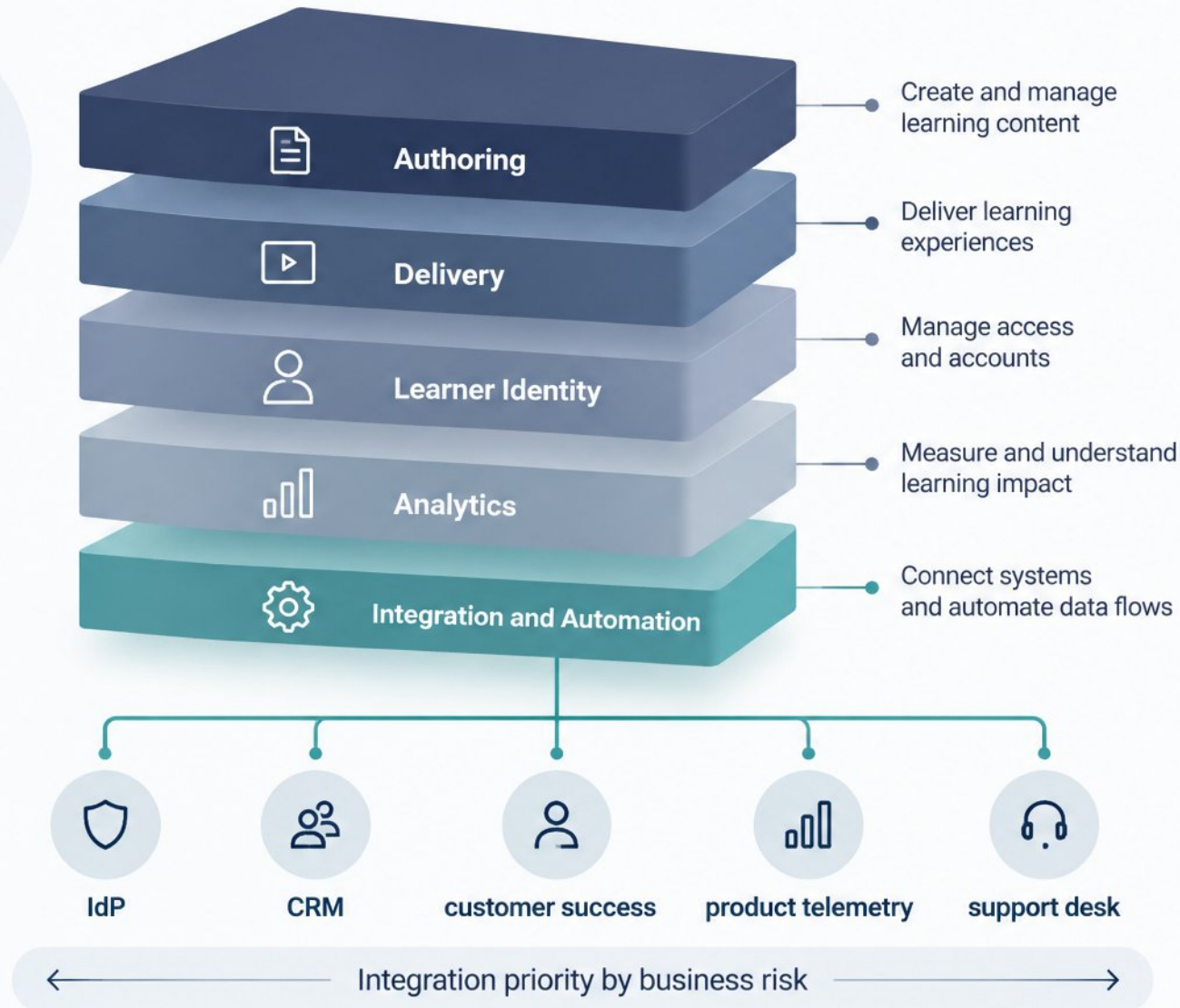


- Four paths: build, general LMS, dedicated customer education platform, or compose best-of-breed
- Pricing anchors (2026): Skilljar ~\$38,972/yr; LearnUpon ~\$30,100/yr; Docebo ~\$35,900/yr
- Multi-portal separation, CRM depth, and APIs matter once channels and certifications appear
- AI helps with drafting, translation, search, and guidance — not governance or data architecture
- Only ~29% report significant AI change: score it, don't gate on it



Target Architecture Blueprint and Integration Priorities

A secure, integrated foundation for learning at scale



- Five layers: authoring, delivery, learner identity, analytics, integration and automation
- Academy is system of record for learning; model layer stays replaceable
- Identity first: SSO controls login, SCIM 2.0 controls whether the account exists
- SSO without SCIM leaves the deprovisioning and stale-license gap open
- Integration priority by business risk: IdP, CRM, customer success, product telemetry, support desk
- Data flows: APIs for current state, events and webhooks for state changes, batch for reconciliation
- Decide explicitly: point-to-point vs. iPaaS vs. event streaming; name an owner per shared field

Identity, Provisioning, and Security Requirements for External Learners

VERIFY EARLY. REDUCE RISK. MAKE CONFIDENT DECISIONS.

- 1 Eight table-stakes items to verify in writing before scoring any vendor
- 2 SSO is now a license-tier question — confirm SAML 2.0 or OIDC sits in your tier
- 3 SCIM 2.0 governs whether the account should exist; SSO only governs login
- 4 Evidence, not assertion: SOC 2 Type II under NDA, observation window within 12 months
- 5 Data residency names region and subprocessors — and must cover backups
- 6 Test time to revoke access after directory deactivation; verify idempotent user handling

KEY RELATIONSHIP



KEY EVIDENCE



PEOPLE.
ACCESS.
OPPORTUNITY.

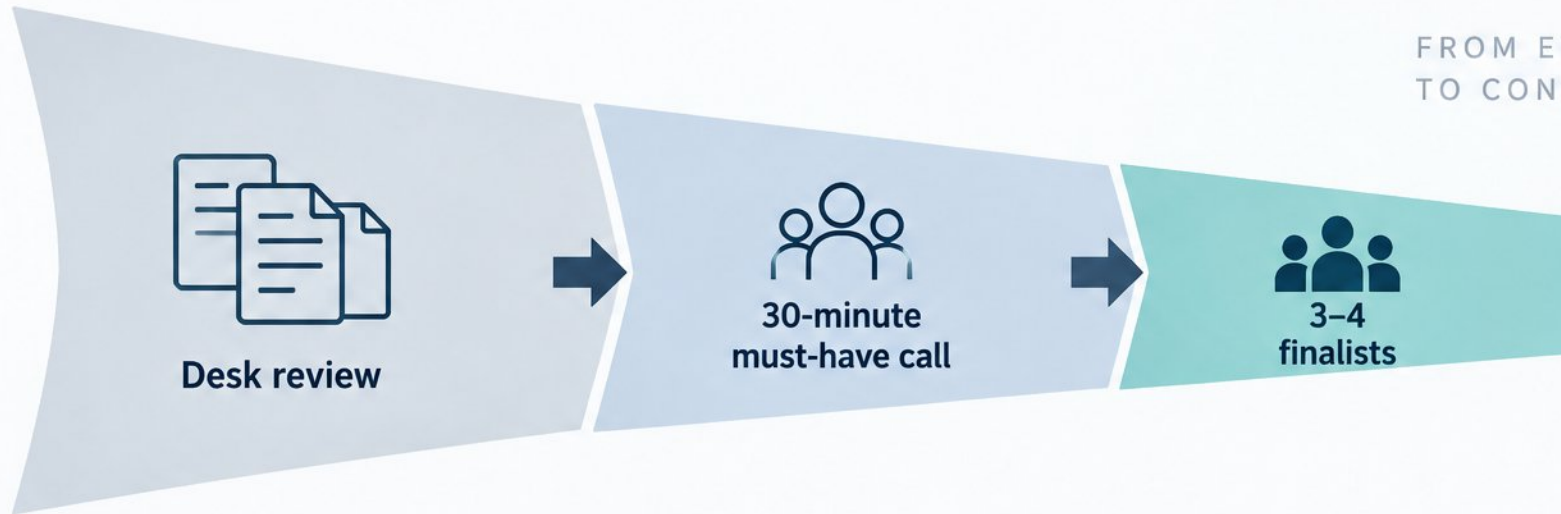
Data, Analytics, and Proving Business Impact

- Climb the five-rung evidence ladder: learning activity, learning performance, product behavior, customer health, business outcome.
- Completion rates are rung one — the starting point, not the finish line.
- Instrument two headline metrics from day one: time-to-value and net revenue retention uplift.
- Compare trained vs. untrained cohorts, matching on account size, segment, usage, and CSM attention.
- Report contribution and correlation language — never causation.
- Govern learner data: consent, retention windows, cross-border transfer, PII masking, DPA coverage.



Evaluation, Scoring, Proof of Concept, and Decision Governance

FROM EVALUATION
TO CONFIDENCE



- Two-stage cut: desk review to 5–8 vendors, then 30-minute must-have call to 3–4 finalists



- Lock scoring weights before vendor responses arrive; reweighting after demos is rationalization



- Run a PoC only for environment-dependent risks a scripted demo cannot resolve



- PoC charter: pass/fail thresholds, real messy data, half the sessions vendor-free, one forced failure



- Document the decision and convert POC findings into contract acceptance criteria before negotiation

Commercials, Licensing, and Three-Year Total Cost of Ownership



Never compare headline prices across different billing units



Model active population under MAU, YAU, and RAU, and check overage unit prices



TCO includes subscription, implementation, migration, authoring, localization, integrations, admin, and support



Hidden risks: overages, 5–12% renewal uplift, per-connector fees, internal labor 10–80+ hrs/month



Negotiate term length, volume tiers, price caps, exit terms, and 60–90 day warranty



Compare every option on an equal three-year footing



Three-Year Total Cost of Ownership

Implementation, Migration, and the Operating Model

PEOPLE | PROCESS | LASTING IMPACT

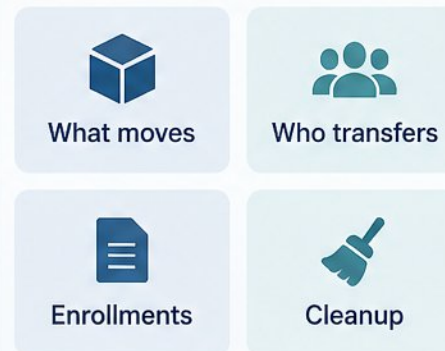
FROM PLANS TO PROGRESS

- Rollouts stall on ownership, migration prep, and change management — rarely on software
- Name one project owner with decision rights; staff six roles
- Timeline drivers: readiness, audiences, integrations, content volume, data quality
- Four migration decisions before kickoff: what moves, who transfers, enrollments, cleanup
- Phased rollout: internal first, then customer pilot, then 2–4 week expansions
- Define the operating model: authors, reviewers, admins, analytics owner, refresh cadence

Project Ownership and Roles



Migration Decisions Before Kickoff



Phased Rollout



LIFECYCLE LOOP



Risk, Governance, and Future-Proofing the Decision

DISCIPLINE TODAY. OPTIONS TOMORROW.



Score lock-in on five mechanics: export format, lookback limits, workflow portability, model dependency, contract shape



Test portability during the POC while the contract is still empty



Content lock-in is separate: missing item banks and scoring logic means redesign, not transfer



Stand up a steering committee, review cadence, and risk register



Re-evaluate when renewal uplift outpaces demonstrated value

Risk Register



export
format



lookback
limits



workflow
portability



model
dependency



contract
shape

Steering Committee

Guide
strategy



Make
decisions

Steering Committee

Review cadence and risk register

Lifecycle Loop



Identity



Data



Impact



Renewal

Decision Workshop: Scoring a Shortlist and Committing to Tradeoffs

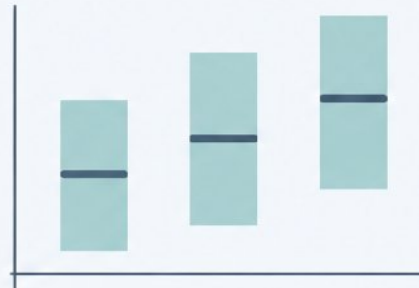
- 1 State your primary metric, 5–8 must-have gates, constraints, and sign-off stakeholders
- 2 Score 2–4 vendors on one locked weighted model; mark native, configurable, custom, add-on, or roadmap
- 3 Remember: "custom and chargeable" predicts budget overrun
- 4 Draft two artifacts live: five-layer architecture sketch with ranked integrations; three-year TCO range
- 5 Commit to top three accepted tradeoffs in the tradeoff register
- 6 Leave with next steps, owners, and evidence required

Weighted Shortlist Scoring

Five-Layer Architecture Sketch



Three-Year TCO Range



Tradeoff Register

Recommendation Package and 90-Day Path Forward



One-page recommendation memo: platform, requirements met, tradeoffs accepted, 90-day success



Review all artifacts together and confirm a named owner for each



Lock pre-negotiation checklist: POC acceptance criteria, export terms, warranty, notice window



Days 1–30 activate first cohort; days 31–60 expand; days 61–90 formal adoption review



Executive readout asks one question: are trained customers retaining and expanding more?



FROM ALIGNMENT
TO LASTING IMPACT

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