# Customer Education Maturity Models Explained

- Customer education is shifting from documentation to a growth, adoption, and retention lever
- A maturity model is a developmental framework for building capability—not a compliance checklist
- Session arc: foundations, 2026 landscape, model anatomy, assessment, roadmapping, operating model
- Learning outcomes tailored for education leads, enablement, customer success, and L&D
- Use this deck to diagnose where you are and leave with a 30/90/180-day action plan

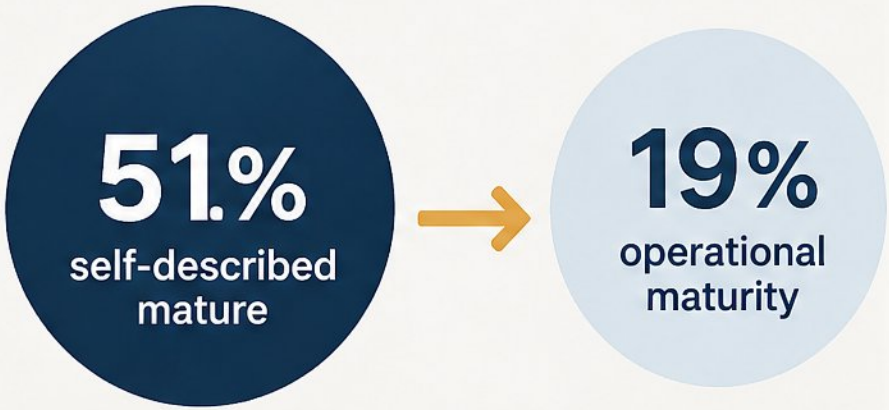


# Why Customer Education Needs a Maturity Lens

- Shift from ad hoc training to lifecycle-based education
- Maturity drives onboarding speed, adoption, retention, expansion, and support deflection
- Reality check: 51% claim maturity, only 19% meet the four-pillar benchmark
- Low maturity symptoms: scattered content, no owner, no measurement
- A structured roadmap beats staying ad hoc
- Education connects customer success, enablement, and L&D



# The 2026 Landscape: What the Data Says




- Retention is the stated goal (57%), but 42% of spend goes to onboarding
- 52% are confident in ROI; many still report measurement gaps
- Sponsor plus budget: 72% strategic positioning, 74% ROI confidence
- Only 29% see significant AI change, mostly in content drafting
- Training-as-product: 62% have an accountable sponsor, versus 33%

# Core Concepts and Vocabulary

SHARED LANGUAGE
STRONGER PROGRESS

- Maturity levels, stages, dimensions, and capability areas: from CMM/CMMI lineage
- Staged maturity levels: organization-wide progression; continuous capability levels: one process area at a time
- Canonical five-level ladder: Initial, Managed, Defined, Quantitatively Managed, Optimizing
- Customer education dimensions: strategy and governance, program design, technology and analytics, AI leverage, activation
- Maturity is a diagnostic yardstick — not readiness, not performance, not a ladder to climb for its own sake




**Maturity level**

**Stage**

**Dimension**

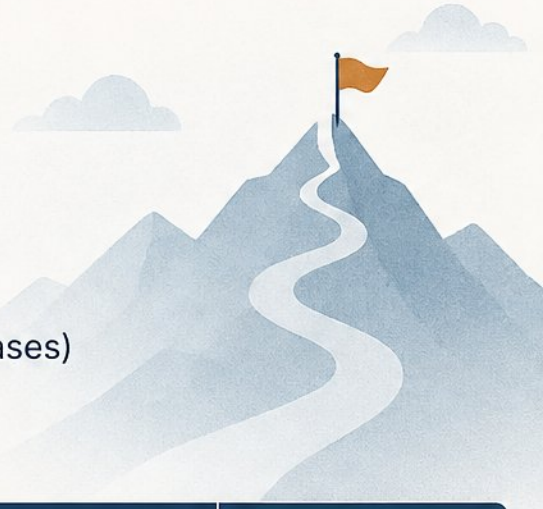
**Capability area**

**Readiness vs maturity**

COMMON CONCEPTS. CLEARER CONVERSATIONS.

# Survey of Major Maturity Models

- CMM/CMMI: five-level staged ladder, still the backbone of later frameworks
- Everest Group CEMA: four stages, six dimensions, 150 organizations surveyed
- Program models: Trainn's 6 stages, Thought Industries' 5, LearnUpon's scale
- Adjacent: customer success models (Build/Operationalize/Transform; TSIA's four phases)
- Compare on scope, dimensions, assessment method, evidence, and intended use



| Comparison Area | CMM/CMMI | Everest Group CEMA | Trainn | Thought Industries | LearnUpon | Customer Success Models |
|---|---|---|---|---|---|---|
| Scope | | | | | | |
| Dimensions | | | | | | |
| Assessment Method | | | | | | |
| Evidence | | | | | | |
| Intended Use | | | | | | |

# Anatomy of a Maturity Model

**Levels:**
observable plateaus, from reactive answers to a measured, self-serve system

**Dimensions:**
strategy, people, process, content, technology, and measurement

**Indicators and evidence:**
live-only delivery versus tiered certification and cohort analysis

**Scoring:**
checklist simplicity versus weighted rigor — balance usability against precision

**Descriptors mapped to next actions,**
so a rating becomes a plan



# Assessing Your Current Maturity

Pick or blend a model

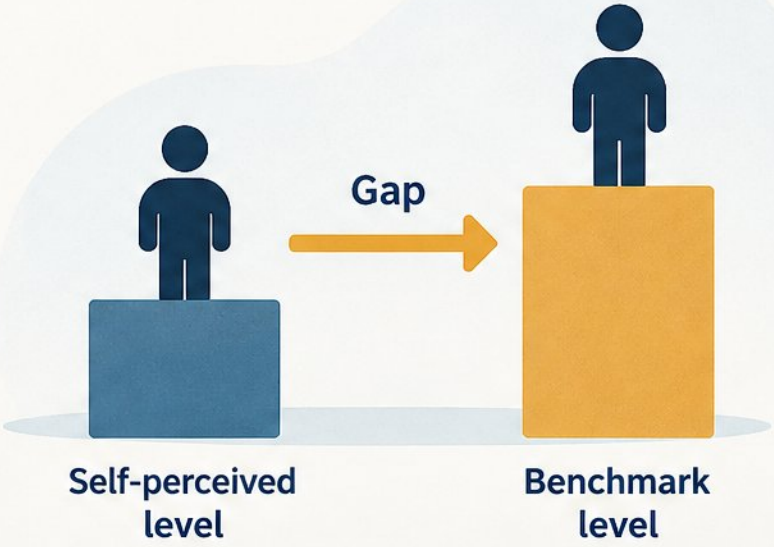
Gather inputs and perspectives

Involve key stakeholders

Guard against inflated self-ratings

Create a prioritized gap map

- Pick or blend a model that fits your business question
- Combine self-assessment, interviews, content audits, and customer feedback
- Involve CS, enablement, L&D, product, support, and RevOps
- Guard against inflated self-ratings: 51% claim maturity, only 19% qualify
- Convert results into a gap map ranked by impact, effort, and dependencies



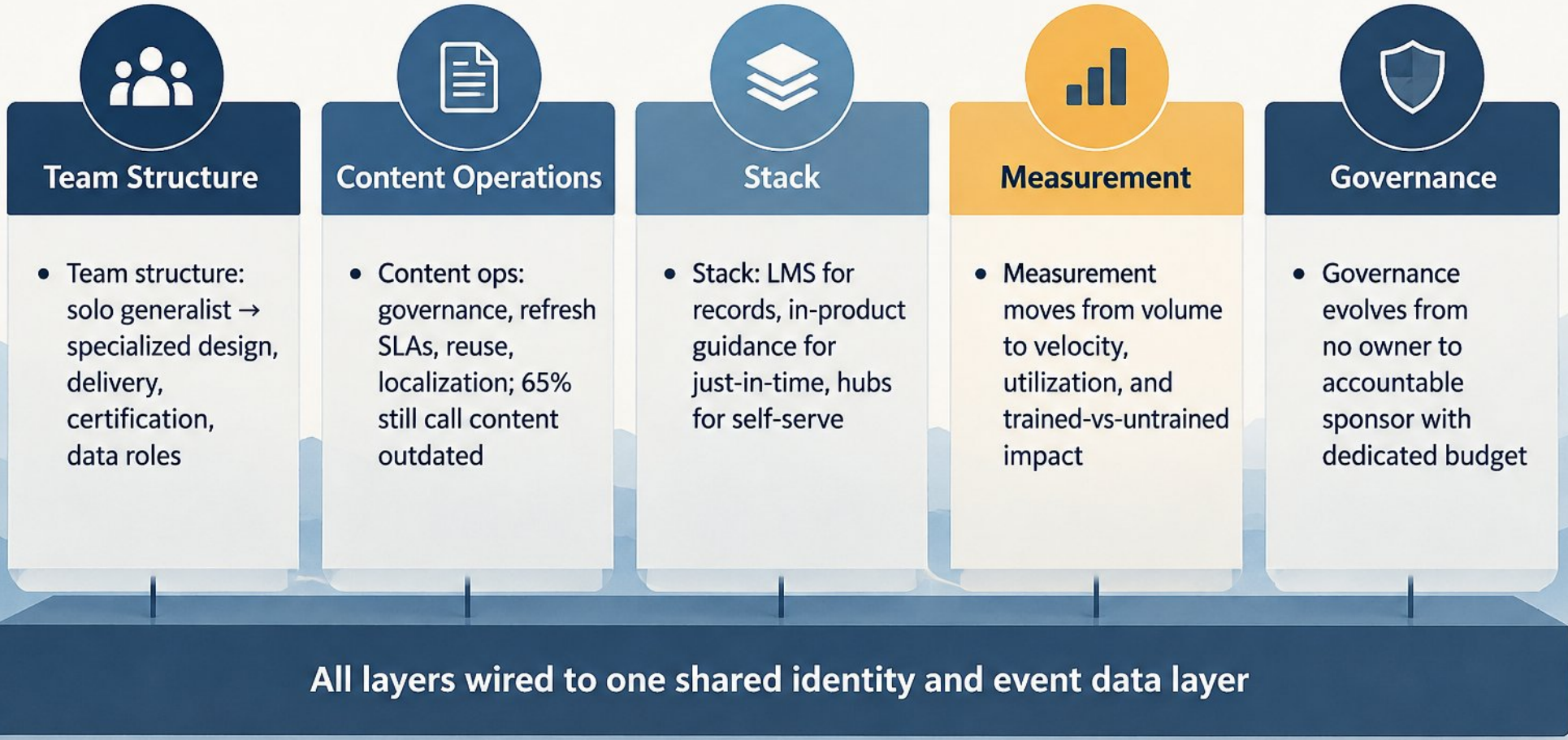
# From Assessment to Roadmap

- Prioritize gaps by business impact, effort, and dependencies
- Set 12–18 month targets matched to context and sponsor appetite
- Sequence quick wins for credibility, then foundational capability builds
- Align with product, CS, marketing, and L&D release cycles
- Define success metrics and a quarterly review cadence



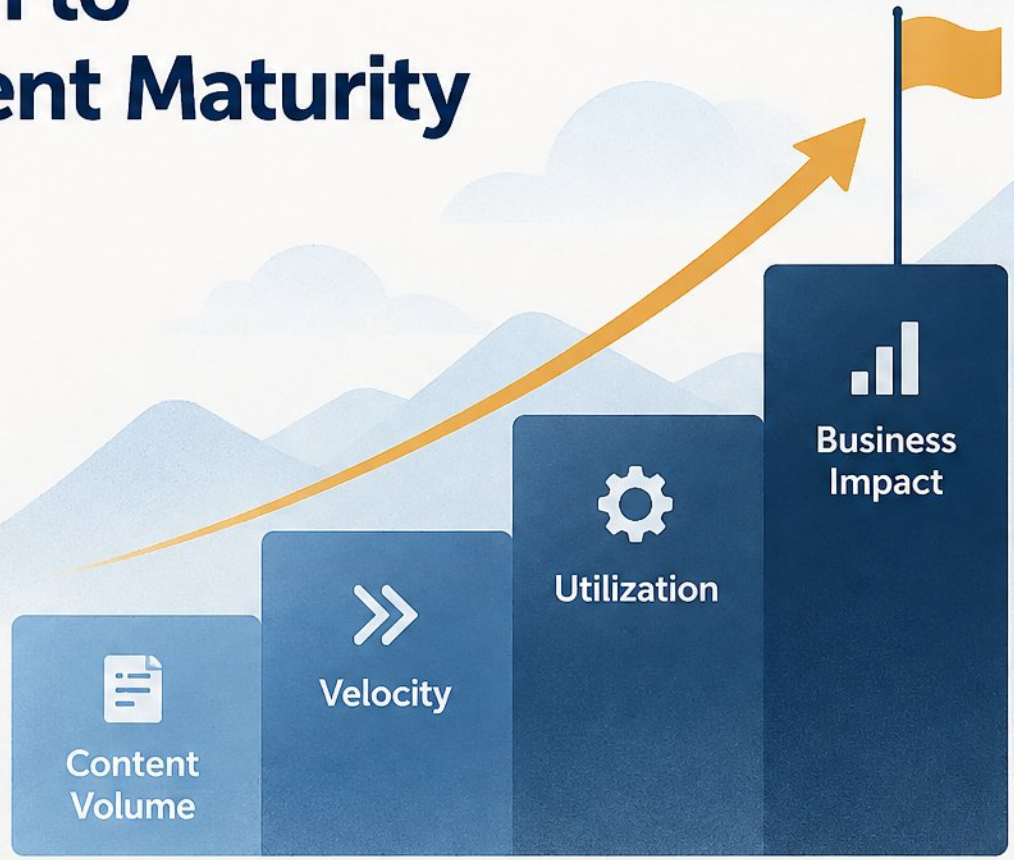
# Operating Model and Capabilities by Maturity Stage

Building the people, content, technology, measurement, and governance to scale learning impact.



# Connecting Education to Revenue: Measurement Maturity

- Four stages: content volume, velocity, utilization, then business impact
- Completions are vanity; feature adoption and ticket deflection are signal
- Sync LMS with product analytics, CRM, and support for trained-vs-untrained analysis
- Speak executive language: NRR, GRR, time to value, support cost per ticket
- Avoid claiming causation without controls, cherry-picking, and over-engineering models






# The AI Dimension of Maturity

- **AI leverage** is now a distinct capability area in CEMA, alongside program, technology, and governance
- **Adoption is early:** only 29% report significant or fundamental change, mostly in content drafting
- **High-value uses remain largely untapped:** personalized paths, adaptive learning, and measurement infrastructure
- **AI lowers the cost of content creation,** accelerating early-stage programs but sharpening governance needs
- **Start with one deliberate, high-impact, low-risk experiment;** define success criteria, then systemize
- **Treat AI literacy** as a **core team capability** and a maturity signal in its own right







**Adoption is early:**
only 29% report significant or fundamental change, mostly in content drafting

# Common Pitfalls and Critical Success Factors

FROM CHALLENGES TO LASTING IMPACT

## Common Pitfalls

- Treating maturity as a ranking exercise, not a learning and planning tool
- Over-investing in content volume before strategy, governance, and measurement exist
- Underestimating change management and buy-in across CS, enablement, product, and L&D
- Stopping at activity metrics leaves ROI claims fragile under budget scrutiny

## Critical Success Factors

- Clear ownership
- Executive sponsor
- Dedicated budget
- Current content
- Proactive lifecycle engagement
- Learning mindset



BUILD KNOWLEDGE. ENABLE PROGRESS.

# Building a Continuous Improvement System

- Run maturity assessment annually or semi-annually; review quarterly
- Tie progress to retention, adoption, and revenue so investment compounds
- 78% of organizations already review customer education quarterly
- Evolve the model as products, teams, and customers change
- Use peer benchmarks carefully; respect cohort and methodology differences
- Commit to 30/90/180-day actions with named owners and evidence



# Workshop: Your 30/90/180-Day Action Plan

ASSESS / ACT / REVIEW / MAKE PROGRESS




- **30 days:** rapid self-assessment across core dimensions; name the gap with clearest business impact
- **90 days:** select your model or hybrid; secure the sponsor conversation; instrument one measurement baseline
- **180 days:** sequence two or three initiatives; define success metrics; set review cadence
- **Share the plan** with partners in CS, enablement, product, and L&D
- **Key takeaways:** benchmers studies, framework sources, and a reusable one-page plan template



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