Subject: Opportunity to consolidate vendors + reduce CS tech spend

Body:

Hi [CFO Name],

I wanted to flag a strategic opportunity we're exploring that could improve our Customer Success efficiency *and* reduce our tech stack costs.

Today **[Acme Academy/University],** plays a key role in lowering Customer Success and Support overhead by allowing our customers to educate on their own time. We're proud of the work we've done but there's so much more we could do.

We have been considering switching to **Skilljar** to power **[Acme Academy]** given it is a best-in-class Learning Management System (LMS) for Customer Education. Now that Skilljar has been acquired by Gainsight—which our CSMs already use daily to manage customer relationships—it's worth exploring more seriously.

There are three key opportunities here for us:

1. **Vendor consolidation:** We could streamline our training workflows into Gainsight via Skilljar and phase out our current LMS or onboarding tools that are not best-in-class. With tight budgets, we should be exploring bringing more tooling under one vendor.

2. **Monetization:** We're seeing education teams using Skilljar to create new revenue streams through training. Smartsheet sells premium certifications and role-based learning paths, driving millions of dollars in revenue while also increasing customer retention. They use purchase and engagement data to understand which personas and industries are willing to pay and optimize offerings accordingly. We could do this too.

3. **Support ticket deflection:** Support teams are leveraging education to drive meaningful ticket deflection. My peers at Shopify are using Skilljar to reduce inbound support volume by making answers and training more easily accessible through a self-serve academy. They are then using insights from course engagement to identify common friction points and proactively improve product documentation and onboarding experiences. Skilljar would allow us to automate onboarding and education, reducing manual effort and limiting the need to grow CS headcount.

Happy to share more details or loop in a rep from Skilljar if you're open to a quick conversation. The potential ROI from consolidation + automation looks promising.

Best,
[Your Name]
[Your Title]