

Handshake's Human + Hybrid Model

A “Learning Everywhere” Playbook



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Welcome to Your “Learning Everywhere” Playbook

You’ve seen them—those stat-packed, feature-focused case studies that show results but skip the how. Or maybe it’s the theoretical frameworks that sound great in one slide, but don’t reflect the day-to-day of a lean CE team juggling onboarding, activation, and proving value with one eye on the roadmap.

In Customer Education, no two teams look alike. Some are early-stage, some are decentralized, some are scaling fast. But what they all share is this: lessons to learn from each other.

That’s what this playbook is.

It’s a real look at how Handshake is adapting to the “learning everywhere” era—where education isn’t a destination, it’s embedded in the moments that matter most.

Education is Everywhere

- **CE now spans countless channels, formats, and touchpoints.**
 - **53%** contribute to help centers
 - **86%** design onboarding programs
 - **28%** manage communities
- **Education isn’t confined to a single platform anymore.**
- **The days of the LMS being the sole home for learning are long gone.**

CE is Embedded Across Functions

- **The siloed idea of CE no longer reflects reality**
 - **30%** report to Customer Success
 - **15%** report to Customer Enablement
 - **8%** report to Marketing, Product, or Professional Services
- **Education pros aren’t just “educators” anymore**
- It doesn’t just matter what team we sit on, but **what outcomes does the business need us to drive?**

Handshake especially focuses on the deep tie between Customer Education and Customer Success —because after all, aren't they both trying to get to the same thing? Less churn, faster time to value, and ultimately, more revenue.

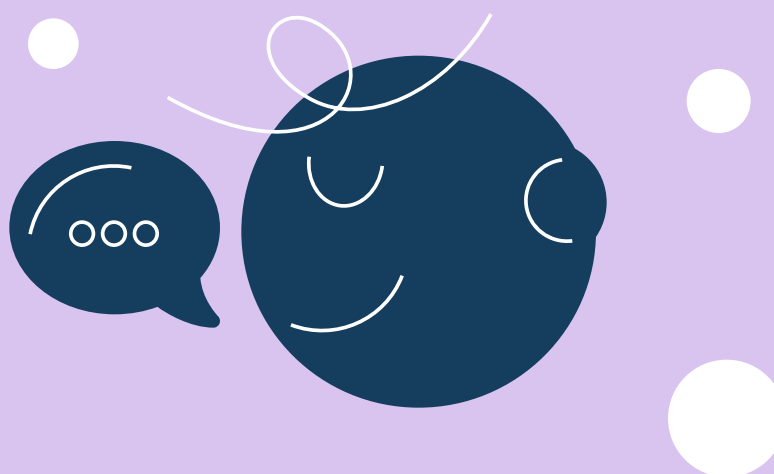
It's how they're putting CE at the center of post-sale outcomes, influencing metrics the C-suite cares about.

You'll find behind-the-scenes decisions, learning curves, implementation strategies, and even mistakes. And for every lesson learned, we've included "How You Could Do This" guides to help you apply the logic—not the logo—to your own reality.

So, I'll let their story do the talking. Then, use this playbook to shape your own.



CAROLINE VAN DYKE
HEAD OF CONTENT,
SKILLJAR BY GAINSIGHT



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Meet Your Education “Teacher,” Tiffany Taylor of Handshake

Tiffany Taylor leads the Customer Education function at Handshake, the leading career platform connecting students and employers. She built and scaled the CE team to serve hundreds of higher education institutions with a model rooted in empathy, data, and cross-functional collaboration.

“We don’t build training to check a box. We build to make sure people are confident in their next action—because when they are, outcomes follow.”



Her team serves a complex audience—academic institutions with seasonal workflows, distributed stakeholders, and high turnover. Tiffany’s focus is on enabling learning at scale while preserving relevance, personalization, and measurable impact.

“Every part of our education model is designed around our customers’ reality, not ours. We meet them where they are, then scale what works.”

The goal? Faster onboarding, smarter adoption, and a program that translates learning into proof of value. Let’s see how she does it.

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1. From Sales to Success: A Hybrid Learning Flow

Handshake's implementation flow is more than a process—it's a repeatable blueprint. Every customer starts with a sales-to-CSM handoff, but what happens next isn't one-size-fits-all. Learning is paced through structured milestones and responsive CSM guidance.

Expanded Implementation Flow

Kickoff Call: Sales hands off to the CSM. This includes a shared implementation brief and a first look at the Academy, where customers are invited to complete a "Pework" bundle in Skilljar.

Milestone 1 (On-Demand): Skilljar courses are auto-assigned based on customer role and segment. This could include topics like "Appointments 101" or "Setting Up Career Fairs."

CSM Midpoint Review: At this stage, Gainsight data triggers a human touchpoint. The CSM reviews completion data (live in the Gainsight dashboard) and tailors the strategy conversation accordingly.

Milestone 2 (On-Demand): Learners continue asynchronously with Skilljar content, targeted by feature area.

Final Strategic Alignment: A final call with the CSM ensures goals are aligned and long-term metrics are mapped to future education and usage.

Because our Gainsight instance pulls Skilljar data directly into the CSM dashboard, we're able to see % completion, last access, and even time spent in session. That means we can say with confidence that 6 hours in the Academy = 2–3 hours saved on 1:1 calls.

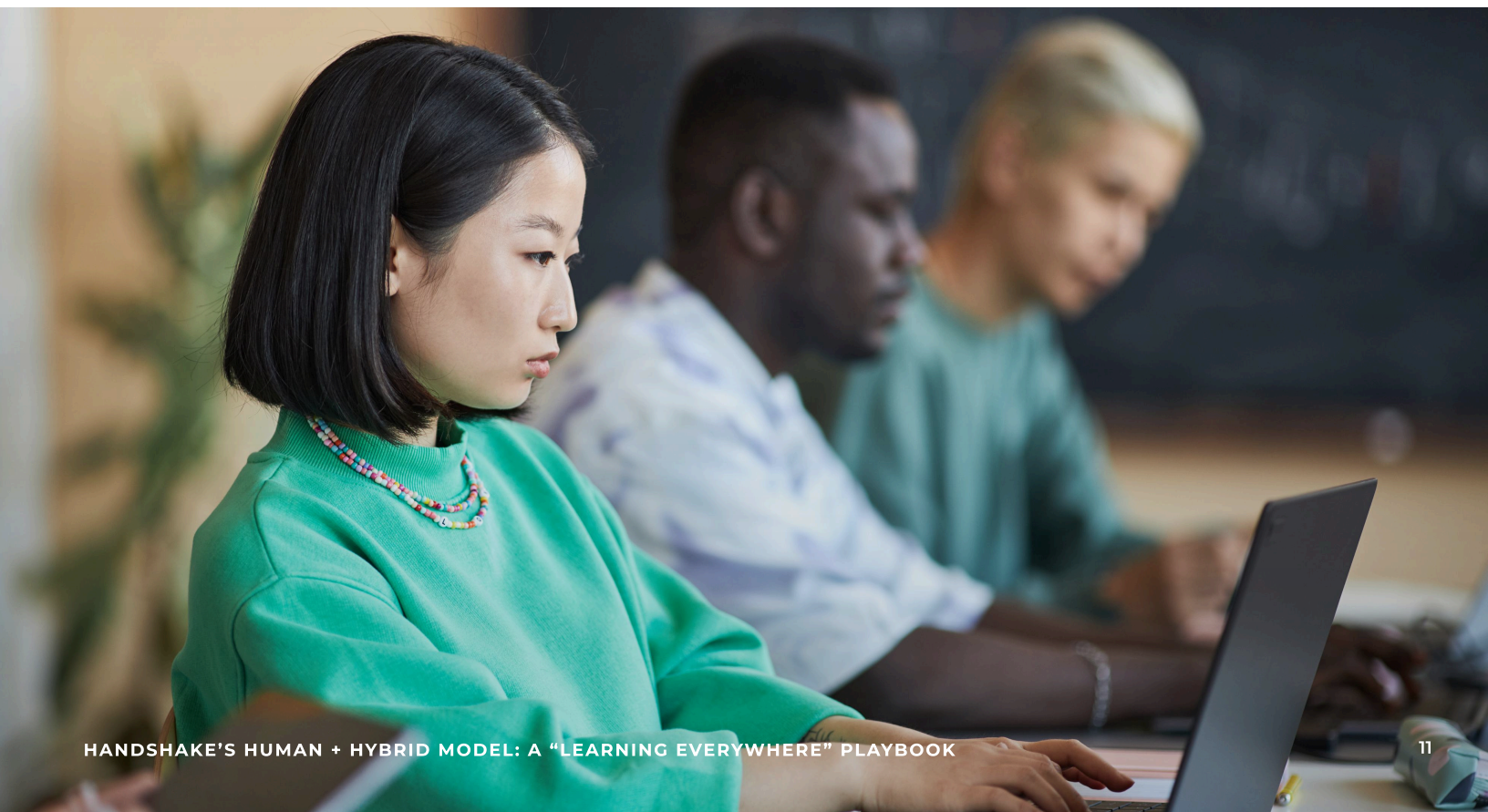
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Handshake's Milestone Builder Template

Milestone	Delivery Method	Assigned Courses (via Smart Groups)	Data Trigger	CS Action
1. Kickoff	Live	N/A (CSM introduces Academy)	Opp Marked as Closed-Win	CSM schedules call and shares CE overview
2. Pework	On-Demand	"Platform Overview" "Login & Navigation"	Course assigned based on role	CSM monitors assignment in LMS or CRM
3. Milestone 1	On-Demand	"Appointments 101" "Profile & Visibility Settings"	50% of core content complicated	CSM prompted to send check-in email
4. Strategy Review	Live	N/A (draws on prework insights)	Triggered by 75% + course completion OR login	CSM holds review session and confirms outcomes
5. Feature Deep Dives	Hybrid	Choose-your-own: "Reporting"/"Career Fairs"/"Events Management"	Enrollment triggered by product usage	CE sends invitation, CSM reinforces in touchpoint
6. Wrap-Up	Live or Email	"Post-Launch Toolkit"	Final module completion OR time-based (30d)	CSM sends transition email + links to support

How You Could Do This in 5 Steps:

- 1 Identify what customers need to know and when they need to know it.
- 2 Break your onboarding journey into logical, outcome-focused milestones.
- 3 Tag key triggers in your LMS and CRM for automation.
- 4 Build review moments that use education engagement as a conversation driver.
- 5 Use embedded course data in Gainsight or Salesforce to personalize support.



2. Designing with Modularity and Seasonality

Handshake's approach to modular design was both a philosophical and operational shift. Rather than designing monolithic courses that tried to cover everything, they focused on flexible, outcome-oriented segments.

**"We had to move away from 'here's everything you might need' to 'here's exactly what gets you through today's task.' That's how we won time, trust, and results."
— Tiffany Taylor**

This became especially important in a landscape where seasonal fluctuations were real—fall hiring cycles, spring campus events, summer transitions. Learners might need training in bursts, not in a linear path.

Handshake's Seasonal + Modular Strategy

- ✓ Learners could complete just one section of a course.
- ✓ Institutions with multiple roles could assign different modules by staff function.
- ✓ Courses were updated quarterly to reflect product evolution and customer calendar rhythms.

Handshake's Template: Modular Content Builder

Module Title	Intended Audience	Time to Complete	When It's Most Relevant	Format	Optional Asset
Managing Appointments	Career Advisors	12 min	Start of Academic Year	Video + Quiz	Downloadable Guide
Creating Fairs & Events	Events Coordinators	12 min	Fall/Spring Hiring Cycles	Interactive	Checklist
Using Reports	Admin Roles	10 min	End of Term	Video	Excel Template

How You Could Do This in 5 Steps:

- 1 Catalog all the core features, workflows, and tools your product supports.
- 2 Break content down into use-case-based microcourses (10–15 minutes).
- 3 Tag content to seasonal needs (e.g., reporting in December, onboarding in July).
- 4 Assign content dynamically using if you have Skilljar Smart Groups.
- 5 Include checklists or printable assets for quick desk-reference usability.

3. Embedded Learning (Everywhere It Matters)

Handshake knew that learners were not going to visit an Academy on command. Instead, they designed for an ecosystem approach—embedding content into the product, support workflows, and regular enablement events.

“We’ve made it so every part of the customer journey is a learning moment. Macros link to Academy, webinars align with feature launches, and our beta programs include guided learning.” — Tiffany Taylor

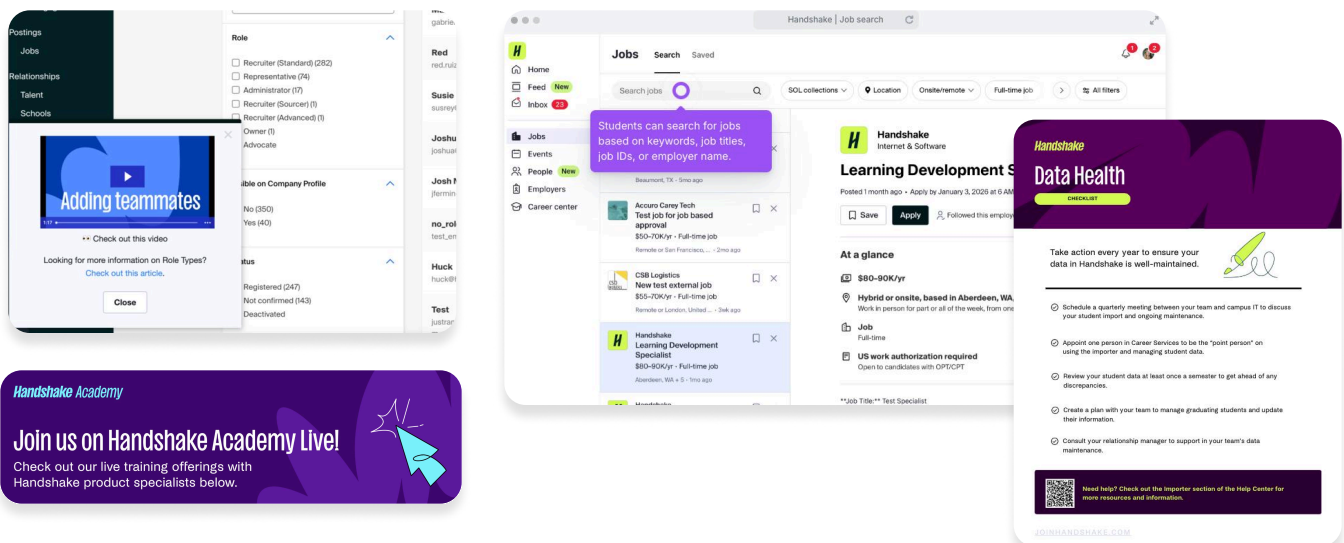
Embedded Channels and Tools

Support ticket flags link to just-in-time Academy content.

Product cues guide learners to training when activating features.

Webinars act as reinforcement and community anchors.

Closed courses are used for beta testers to help guide product feedback.



Handshake's Template: Learning Touchpoint Planner

Channel	Education Asset Linked	Triggered by	Format	Metric to Track
Support Ticket Flags	"Appointments 101" Course Link	Ticket Topic = Scheduling	Link	Click-through Rate
In-App Message	Reporting Module Walkthrough	User Opens Reports Tab	Tooltip + Video	Engagement Rate
Quarterly Webinar	New Features Playlist	Feature Launch	Live Sessions	Attendance + NPS

How You Could Do This in 5 Steps:

- 1 Conduct an audit of all customer-facing surfaces: where can education live?
- 2 Integrate learning into help articles, ticket responses, in-product tips.
- 3 Coordinate webinars to follow major product updates.
- 4 Syndicate content where customers already are (internal LMS, shared drives).
- 5 Build a shared tagging system to link learning assets to product modules.

And That's a Wrap—But Don't Forget the Impact

At the end of the day, all the workflows, playbooks, and tech stack decisions serve one larger purpose: measurable, meaningful business outcomes.

What Handshake built isn't just a cleaner implementation process or a tighter CE-CS loop. It's a new way to talk about the value of Customer Education—backed by data and grounded in outcomes.

“The best part isn't just watching more learners get certified or seeing course completion go up. It's when a CSM says, ‘Because they did this course, I didn't have to spend that call on setup—I got to spend it helping them launch something bigger.’ That's the win.” — Tiffany Taylor

When education works, it frees up CSMs to be strategic. When education works, it helps customers go live faster, use more product, and renew with confidence. When education works, it proves its place—not just in the customer journey, but in the revenue engine.

Before

- Inconsistent delivery of product updates
- Inconsistency in showcasing time to value
- CSM load: hours and hours spent on calls varied
- No standardized way to measure proof of learning
- Budget buy-in: breach of acceptable ratio

After

- **Consistent** delivery of product updates
- **Consistent**/faster time to value
- Lowered CSM load without sacrificing connection
- Validated proof of learning
- **Budget buy-in:** cost of a new tool vs. additional headcount

And Handshake has the data to prove it:



Learners who took onboarding training went live with Handshake 50% faster



Trained accounts were 54% more likely to have a 'Green' customer health score



Handshake CSMS reviewing Skilljar data in Gainsight CS saved up to 2-3+ hours per account

You do all this setup—you build the courses, configure the LMS, partner with CS, and dig into reporting. But eventually, you get to tell the story of what you've actually achieved. That's what gets you budget. That's what gets you headcount. And that's what makes this work feel impactful.

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So whether you're just starting or rethinking your strategy, use this playbook as proof: great education isn't just instructional. It's influential. And it's essential to the future of post-sale growth.

Your learners—and your execs—will thank you.

ABOUT GAINSIGHT

Gainsight empowers businesses to drive durable growth with customer-led, product-led, and community-led strategies. Trusted by leaders like GE Digital, SAP Concur, and Box, Gainsight helps scale efficiently, boost adoption, prevent churn, and grow through renewals and expansion.

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