

*Workbook*

# Re-Architecting Digital Experience Teams: Skills, Structure & Strategy



## Making Sense of Your Team Structure **(or at least trying to)**

Here's the uncomfortable truth: nobody really knows how your team is "supposed" to be structured—and waiting for someone else to figure it out is a losing game.

If you're in Customer Education, Community, Product Education, or Digital CS, you already live this reality. Titles don't match responsibilities. Org charts shuffle every quarter. Half your job is re-explaining what you do—even inside your own company. And while the chaos can feel frustrating, it's not actually the biggest problem. The real danger is getting stuck debating titles and reporting lines while the business around you is demanding outcomes.

Because here's the backdrop: the board wants profit. The C-suite wants customers to stay. CS teams are running lean and burning out. This is your moment to prove value—but it won't look like a cookie-cutter playbook.

This workbook is here to help you get clear. Not on what your job title says, but on what you actually get done. You'll map your outcomes, your overlaps, and your opportunities to lead like a center of excellence—even if your org chart doesn't say so.

Inside, you'll find exercises to help you:

- Cut through the noise of job descriptions and map your real responsibilities.
- Tie your work to adoption, retention, and expansion—the metrics leadership actually cares about.
- Spot where your role overlaps with Community, Education, or Digital Success, and turn that into partnership instead of turf wars.
- Sketch a Center of Excellence model for your team—something you can use to tell a sharper story to leadership and get resources where you need them.

Because customers don't care what your team is called. They care about getting value. This workbook will help you strip away the noise, claim your lane, and design a structure that works in the real world.



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## What's Inside?

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- 03 Craft Your Function's Narrative
- 04 Prove It—Programs That Matter
- 05 Build Your 'Ah-Ha' Final Pitch



## Assess and Align Your Skillset

You can't build a high-performing team without knowing what skills you actually have—and what gaps are holding you back.

### Why This Section Matters:

This section gives you a practical, no-BS way to evaluate your team's readiness to deliver modern digital experiences.

Because “we're a scrappy team” doesn't scale—and “we'll figure it out” isn't a strategy. This helps you spot blind spots, shift from generalists to specialists (when needed), and get honest about whether you're building the team for today's demands or tomorrow's.

### How It Helps Re-Architect Team Expectations:



**Gives you a skills inventory** to guide hiring, reskilling, or partnering



**Highlights where your team is** over-indexing or under-supported



**Creates a common language** across CE, Community, PX, and CS



**Prepares you for budget asks** and headcount justifications

This isn't a vanity exercise. It's how you stop being reactive and start designing a team that matches your mandate.

## INSTRUCTIONS

For each category below, rate your team's current strength from 1 (nonexistent) to 5 (core competency). Then identify whether your action is to hire, reskill, maintain, or partner.

### Skill Categories + Prompts

#### 1. LEARNING DESIGN & CONTENT OPS

Do we have the skills to build content that drives real learning outcomes—at scale?

Are we able to create, update, and deliver content efficiently?

*If your LMS feels like a dumping ground for old decks, this one's for you.*

#### 2. COMMUNITY MANAGEMENT & MODERATION

Can we drive meaningful engagement and knowledge-sharing within our community?

Are we able to create, update, and deliver content efficiently? Do we have someone who understands how to nurture advocates, not just monitor threads?

*Community is a channel, not a dumping ground. Do you have the human layer to make it work?*

#### 3. DATA FLUENCY & STORYTELLING

Are we able to pull and interpret the data that matters—from platform usage to customer behavior?

Can we tell a compelling story to leadership using that data?

*Data without context is noise. You need someone who can translate activity into business value.*

4. IN-APP ONBOARDING & JOURNEY DESIGN

- Do we know how to build experiences inside the product that help users succeed?
- Are we collaborating effectively with PX or product teams?

*If customers never finish onboarding, it's not always the CSM's fault. Sometimes it's because no one's owning the in-product experience.*

5. AI / AUTOMATION READINESS

- Are we actively exploring how AI can reduce manual effort, personalize learning, or scale support?
- Do we have a plan (or partner) for intelligent content or conversational AI?

*You don't need to be bleeding edge—but you do need to stop pretending AI is "someone else's problem."*

6. CROSS-FUNCTIONAL ORCHESTRATION

- Can we align and influence teams like Product, CS, and Marketing?
- Are we seen as a strategic partner—or just a delivery team

*This is your political capital. Without it, even the best programs can fall flat.*

Example Skills Matrix with Action Items (example)

Skill	Score	Action	Notes
Learning Design & Content Ops	4	Reskill	Add adaptive learning + accessibility best practices
Community Management	2	Partner	Need a dedicated moderator or vendor support
Data Fluency & Storytelling	3	Upskill	Send team lead to a storytelling w/data workshop
In-App Journey Design	2	Collaborate	Work with PX to co-own onboarding flows
AI / Automation Readiness	1	Research	Audit where AI could reduce manual lift
Cross-Functional Orchestration	4	Maintain	Double down on PMM + CS alignment

## Choose Your Org Model

The lines between CE, Community, Product Experience, and Digital Success have officially blurred—and that’s not a bad thing.

### Why This Section Matters:

But if your org structure hasn’t evolved to match that reality, you’re likely feeling the pain: duplicated efforts, unclear ownership, siloed tools, and clashing priorities. This section helps you stop duct-taping your team together—and start building a structure that actually works.

Whether you're growing headcount or just re-mapping responsibilities, this gives you clarity on how modern teams are aligning for impact.

### How It Helps Re-Architect Team Expectations:



**Exposes gaps in collaboration,** not just headcount



**Helps you justify org changes** (or resist them, smartly) with real-world comparisons



**Identifies how ownership and execution are split** (or shared)



**Surfaces inefficiencies** in the “dotted line but accountable” model

This isn’t about reporting lines for the sake of politics. It’s about structuring your team for **speed, clarity, and impact**.

INSTRUCTIONS

Read through the models below and note which structure most closely reflects your team today. Then assess whether that model still serves your goals—or whether it’s time for a shift.

Common Org Models to Consider

MODEL 1: EMBEDDED DIGITAL EXPERIENCE TEAM

CE, Community, PX all roll up under a single “Digital Success” or “Customer Learning” function.

**Good for:** alignment, speed, shared goals  
**Watch for:** over-centralization, lack of deep domain expertise

Pros	Cons
Unified strategy & metrics	Risk of one team’s priorities dominating
Easier cross-collab & tools sync	Hard to maintain specialization
Clear accountability	May lack influence across C-suite

MODEL 2: CENTRALIZED CONTENT + DISTRIBUTED STRATEGY

Core team owns tooling and content systems; strategy sits with each department (CS, PX, etc.)

**Good for:** consistency, platform management  
**Watch for:** backlog issues, “request queue” mentality

Pros	Cons
Content quality & governance	Prioritization becomes political
Specialists stay in their lanes	Strategic alignment gets diluted
Clear ownership of the LMS/academy	Often under-resourced

MODEL 3: COMMUNITY HUB WITH PROGRAM SATELLITES

Community is the primary home; CE and PX feed into it via structured programs and campaigns.

**Good for:** scale, engagement, P2P value  
**Watch for:** light touch on formal training, disconnected metrics

Pros	Cons
Peer support + expert education	May lack structure for deep learning
Lower lift on CS + support	Community data often under-leveraged
Great for advocacy + engagement	Harder to tie to business outcomes

RED FLAGS TO WATCH FOR

- “We own it... kind of.” (Ownership is shared, but accountability isn’t.)
- CE reports into CS, but all metrics are tied to Product goals
- In-app onboarding and Academy aren’t even on the same roadmap
- Everything is a request queue. Nothing gets strategic attention.

Final Output: Org Model Summary Slide (copy format)

SLIDE TITLE: OUR ORG MODEL—CURRENT VS. FUTURE STATE

Current State	Challenges Noted	Future Direction
CE under CS, Community under Marketing	Misaligned goals, lack of tool integration	Move toward Digital Experience umbrella
PX owns onboarding, CE owns LMS	Inconsistent content, duplicated effort	Shared roadmap, unified intake process
LMS managed by Marketing	No training strategy, misaligned messaging	Centralized platform, team enablement

NEXT STEPS

- Share this model with cross-functional leads to realign on scope
- Use it to frame a re-org proposal or headcount request
- Revisit this quarterly as roles shift and tech stacks evolve

## Craft Your Function's Narrative

Most digital experience leaders are still stuck reacting to what other teams ask for —“Can you make a quick training for this?” or “Can you drop this in community?”

### Why This Section Matters:

This section helps you flip the script. It gives you the words—and the clarity—to define your function's strategic role before someone else defines it for you.

Because if you can't clearly explain what your team does and why it matters, don't expect anyone else to.

This is how you shift from order taker to strategy driver. From “the LMS team” to “the team driving adoption, retention, and customer love.”

### How It Helps Re-Architect Team Expectations:



**Aligns cross-functional stakeholders** around shared outcomes



**Resets misconceptions** about your role—internally and externally



**Clarifies what you own** (vs. what you influence or co-create)



**Frames your impact in business terms** (not just content output)

# NOW, **WORKBOOK TIME**

**PROMPT 1: WHAT’S THE PURPOSE OF YOUR TEAM—IN ONE SENTENCE?**

<b>EXAMPLE</b>	<i>“We deliver digital experiences that help customers adopt faster, expand smarter, and succeed independently.”</i>
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This should be simple, punchy, and focused on outcomes, not deliverables. Don’t say “we create trainings.” Say what those trainings actually enable.

**PROMPT 2: WHAT DO YOU OWN AND WHAT ARE YOU INFLUENCING OR CO-CREATING?**

<b>EXAMPLE</b>	<b>We influence or co-create:</b> <ul style="list-style-type: none"><li>• In-app journeys (with Product)</li><li>• Lifecycle comms (with Marketing)</li><li>• Customer success workflows (with CS)</li></ul>	<b>We own:</b> <ul style="list-style-type: none"><li>• Customer onboarding strategy</li><li>• Scalable training programs (Academy, LMS, webinars)</li><li>• Community engagement + moderation</li></ul>
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Use this to draw some much-needed lines around responsibility—while showing where you collaborate.

**PROMPT 3: WHAT BUSINESS OUTCOMES ARE YOU TIED TO?**

<b>Pick your top 2–3. Be ruthless. Don’t list 12 metrics—focus on what matters to execs.</b>		
<b>EXAMPLE</b>	<ul style="list-style-type: none"><li>• Time to First Value</li><li>• GRR (Gross Revenue Retention)</li><li>• NRR (Net Revenue Retention)</li><li>• Support deflection</li></ul>	<ul style="list-style-type: none"><li>• Feature adoption</li><li>• Onboarding completion rates</li><li>• CSAT / NPS</li></ul>

This is your north star. These are the numbers that justify your team’s existence and future growth.



**PROMPT 4: WHAT ARE THE TOP 3 PERCEPTIONS OF YOUR FUNCTION TODAY**

**Pick your top 2–3. Be ruthless. Don’t list 12 metrics—focus on what matters to execs.**

**EXAMPLE**

- “They’re the LMS people.”
- “They make stuff look nice but aren’t strategic.”
- “They handle new user onboarding, right?”
- “They’re the content creators for CS.”

Why this matters: until you surface these perceptions, you can’t shift them. Some will be totally off. Some will have a kernel of truth. You need to name them before you can reframe them.

**Final Output: Internal Positioning Starter Kit****Slide 1: Who We Are**

We’re the team driving scalable customer success through education, community, and in-product guidance.

We reduce support volume, accelerate onboarding, and increase product adoption—without adding headcount.

**Slide 2: What We Do & Why It Matters****Own**

Customer training strategy

Community engagement

Academy + certification programs

**Co-Create**

In-app journeys (with Product)

Lifecycle comms (with Marketing)

Support workflows (with CS)

**Impact**

Faster onboarding (TTV)

Higher feature adoption

Support ticket deflection

## Prove It, Programs That Matter

Let's be real: most teams are still tracking output, not outcomes. "We launched X courses." "We hosted Y webinars." That's fine for an activity log—but it won't move the needle with leadership.

### Why This Section Matters:

This section helps you connect the dots between what you're running and why it matters to the business.

It's also how you earn more resources, justify your strategy, and defend your priorities. Not everything you run will have a straight line to revenue—but every program should earn its keep.

### How It Helps Re-Architect Team Expectations:



**Shifts focus** from tactical execution to strategic impact



**Aligns digital programs** with core business metrics like retention and expansion.



**Builds credibility** with CS, Product, and Marketing by showing shared outcomes



**Clarifies what's working**, what needs tweaking, and what should get cut

This turns your team from a "training provider" into a business partner.

## INSTRUCTIONS

For each program your team runs or contributes to, map out:

- What it is
- Where it lives
- Who owns it
- How you measure success
- What business outcome it supports

Then step back and look at the whole picture. Are your programs laddering up to the right goals—or just keeping you busy?

## Program-to-Outcome Mapping (Template)

Program	Channel	Owned By	Key Metric	Business Outcome
Academy	Web	Education	Course completions	Feature adoption
Certifications	LMS	Education	Cert completion rate	Expansion readiness
Office Hours	Community	Community	Attendance rate	Support deflection
In-App Guides	Product	PX	Guide completion %	Faster onboarding (TTV)
Lifecycle Emails	Email	Marketing	CTR, engagement	Churn reduction
Help Center	Web	CS / Support	Self-serve deflection	Ticket volume reduction
Success Plans	In-product	CS	Task completion %	Retention (GRR)

## Additional Prompts to Push Thinking

- Which programs drive revenue retention (GRR)?
- Which programs reduce support burden (tickets, time)?
- Which are designed for scaling human effort (CSMs, onboarding)?
- Are any of your programs measurable by adoption or engagement data?

## Final Output: Roadmap View + Prioritization Grid

Split your initiatives into 3 buckets:

1. **Keep** (proven impact, strategic value)
2. **Optimize** (working, but needs better targeting or measurement)
3. **Rethink or sunset** (low ROI, unclear goals)

Then build your **quarterly priorities slide**:

### Slide 2: What We Do & Why It Matters

Program	Status	Focus Area	Owner
Academy	KEEP	Cert expansion	CE Lead
Office Hours	OPTIMIZE	Improve post-session NPS	Community Mgr
In-App Guides	RETHINK	Drop low-engagement flows	PX + CE

### Next Steps:

- Share your program-to-outcome map with leadership
- Use the roadmap to say no to one-off requests that don't ladder up
- Start tracking one new **business-level** metric for each major program

## Build Your 'Ah-Ha' Final Pitch

You can run the best programs, structure your team perfectly, and crush your goals—but if you can't articulate that value in exec-speak, you'll keep getting deprioritized.

### Why This Section Matters:

This section helps you stop explaining and start influencing.

CE, Community, PX—they're still misunderstood by a lot of execs. Your job is to help them connect the dots: what your team does, why it matters, and what needs to happen next.

### How It Helps Re-Architect Team Expectations:



Positions your team as a **driver of strategic outcomes**, not a delivery team



Equips you with messaging that lands in **budget conversations and QBRs**



Gives you a **reusable pitch deck** to align your team and influence others



Translates your impact into **language the CFO won't roll their eyes at**

Let's get you off the defense—and into the driver's seat.

## NOW, **WORKBOOK TIME**

### Part 1: Messaging Fill-Ins for Execs

These are meant to be stolen, tweaked, and dropped into board decks, OKRs, or 1:1s with leadership.

**Our team contributes to GRR by:**

“Helping customers adopt key features within their first 30 days through structured onboarding and in-app guidance.”

**We reduce support costs by:**

“Shifting Tier 1 inquiries to self-serve education and community-driven answers.”

**We influence expansion by:**

“Training users on premium features through certifications that drive upsell readiness.”

**We improve product adoption by:**

“Delivering in-product journeys tailored to role and plan, increasing daily active usage by 15%.”

### Part 2: Your 3-Slide Internal Pitch Deck (copy-ready)

**Slide 1: What We Do**

Our team delivers scalable digital programs—training, community, in-product education—that guide customers from onboarding to renewal.

We reduce manual CS effort, increase product engagement, and create the path for expansion.

## Slide 2: Why It Matters

Our programs directly impact:

- **GRR** → Faster onboarding = lower early churn
- **Support Costs** → Academy + Community = 30% fewer basic tickets
- **Expansion Readiness** → Feature certs + use case training = increased product stickiness

***We're building** not just for today's users —but **for tomorrow's revenue.***

## Slide 3: What's next

### **Next priorities:**

- Launch new onboarding flow for enterprise accounts
- Map certifications to product tiers for upsell motion
- Embed CE + PX planning into the Q1 product roadmap

### **What we need:**

- 1 headcount for automation + in-app guide ownership
- Dedicated analytics support to track education impact on NRR

***Goal:** Make digital experience a **non-negotiable** part of **post-sale strategy.***

## Bonus: CFO-Friendly Metrics to Use

If your audience loves numbers, use these:

- Time to First Value (TTV)
- Certification to expansion conversion rate
- Ticket deflection rate from trained users vs. untrained
- Active users post-30 days (vs. baseline)
- CSAT uplift tied to education completion

## Final Takeaways:

- Keep this pitch tight: 2–3 slides max, focused on business value
- Use it proactively—don't wait for someone to ask
- Update quarterly so your narrative evolves with your impact

### 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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