



Brandon Hall Group
**EXCELLENCE
AT WORK**

Executive Interview

with **Jen Jackson**,
SVP, Customer Service
Litmos

The Pivotal Role of Reskilling and Upskilling
Customer Experience Teams

About Litmos

Litmos develops learning solutions for top-performing companies. An established leader in the market since 2007, Litmos offers the world’s easiest-to-use LMS, comprehensive learning content libraries, integrations with top workflow tools and services to support success. Thousands of companies trust the solutions to create, curate and connect learning content to employees, customers and partners. The solutions are used by more than 20 million people in 150 countries, across 35 languages. Find more information at www.litmos.com.

Recognition

A Brandon Hall Group™ Platinum Smartchoice® Preferred Solution Provider, Litmos won 11 awards in the 2023 Brandon Hall Group™ Excellence Awards®, including two in HCM Excellence and nine in Excellence in Technology.

EXCELLENCE IN HCM AWARDS



Learning and Development 2 Bronze Awards

EXCELLENCE IN TECHNOLOGY AWARDS

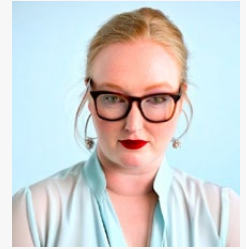


Learning and Development 6 Gold Awards | 2 Silver Awards
Sales Enablement 1 Silver Award

The Brandon Hall Group™ Preferred Provider Program is specifically designed as a single source of truth that can validate your technology selection decisions.

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About Jen Jackson



Jen Jackson is a seasoned Senior Executive in Customer Success with over 20 years of experience in building and optimizing post-sales teams for private equity and venture capital SaaS organizations. She has a proven track record of decreasing costs, increasing efficiency, and retaining customers through strategic planning and cross-functional collaboration with a focus on the customer experience.

Jen is an expert in developing processes and procedures that enable effective teamwork across functions to deliver outstanding customer outcomes. She has a keen eye for identifying opportunities for improvement and implementing change management initiatives to drive sustainable results. Her analytical skills and strategic mindset have enabled her to translate customer research into actionable strategies that have consistently delivered high levels of customer satisfaction.

Prior to joining Litmos, Jen held senior customer success roles at KnockCRM, Dialpad, Serenova/Lifesize, Reachforce, Kinnser, Neverfail, and reaching far back to Dell and Apple, where she led teams that achieved remarkable results in improving customer retention rates, reducing churn and increasing revenue through upsell and cross-sell initiatives.

In Jen's free time, she enjoys her grandchildren and many animals on the Ranch.

About Michael Rochelle



Michael Rochelle is Chief Strategy Officer and Principal Analyst at Brandon Hall Group™. Michael leads a wide range of advisory support and strategic engagements for Fortune 1000 and small- to medium-sized organizations as well as leading and emerging solution providers across the HCM industry. Michael has more than 30 years' experience in HR, IT, sales, marketing, business development, and strategic and financial planning in Fortune 500 and venture-backed start-up organizations.

Q **MICHAEL**

Jen, can you tell us a bit about yourself and what you're doing at Litmos?

A **JEN**

I joined Litmos about 15 months ago as part of a divestiture, leading the entire customer experience organization from services, success to support. We had to look at our customers, how we wanted to engage, and whether our success organization needed to be a revenue growth engine and partner with Sales.

In looking at the skills and talents of our team, some had experience with revenue generation, while others did not. So we had to do some upskilling, identifying the most important things like listening for opportunities, growth opportunities and value extension, and putting together training plans to help them.

Q **MICHAEL**

What are the things your customers bring to you in terms of trying to understand how to be the most successful?

A **JEN**

We really start with the "why" — what are you looking for in terms of your teams, your customers, and your customers' customers? We think about it in use cases, like training your department for a larger initiative around compliance or regulatory requirements, or training your customers on new product releases, or working with external partners.

We try to talk through what kicked off this journey to explore learning and capabilities, and then discuss the business model as a whole to capture all the use cases and build a program that can work internally and potentially be replicated externally.

Q **MICHAEL**

It's a complex challenge to enable these teams and help them feel strongly connected to the business's success. How do you address that with what you offer at Litmos?

A **JEN**

It seems that you have a good understanding of your Ideal Customer Profile (ICP) unless you're a business that is just starting out. Your ICP refers to your ideal customer — who you are targeting externally, what your value and selling points are, and how you can align with your sales organization and revenue enablement.

We have to talk about your content — do you have it, or do you want us to help you create it? Gathering all this information and learning about the business really helps us set them up for success.

Q **MICHAEL**

You mentioned that there are some core foundational things that are consistent across verticals and business sizes. Can you elaborate on that?

A **JEN**

I'd say there are a lot of foundations that do go across all verticals and business sizes. For example, Sales teams need training on negotiation, value selling and customer engagement. Support teams need training on process, transactional work, responsiveness and KPIs.

It's when you start to drill down in the discovery and planning that you identify where there are niches or custom needs specific to the industry, vertical, or the organization's way of doing business.

Q **MICHAEL**

What have you found to be the best recipe for helping these teams in terms of learning modalities like coaching, simulations, gamification and microlearning?

A **JEN**

I think I would say that before you get into talking about measuring, you have to talk about the content and your goals there.

If you have a program where you need them to watch a video or take a test or review some content and then some coaching for some real-life scenarios, I think you have to think about that when you're defining your learning path and what that looks like. That's a part of it.

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When you talk about gamification, that's really at a higher level where you can create that for your teams to have that natural competitiveness. Our CEO is the proud owner of the massive amounts of badges that we have because he is a lifelong learner. He is the epitome of a lifelong learner. And so he spends the majority of his time checking and testing our new content, defining and working in our new learning paths and things like that. So if we were to log into our product right now, he would be the top of our leaderboard and he holds that title.

Training can be sometimes a little dry and digestion, but if you break up the content and the delivery and you add in the different modalities where we're not just reading pages, where we're not watching video after video, where we're kind of putting all of these things together to keep me engaged, then we can create some fun with it and we can create some just natural competitiveness, which I think helps also get your team.

Q **MICHAEL**

Do you describe this practice the same way as "upskilling" and "reskilling"?

A **JEN**

I'd say more often we hear about career pathing and the evolution of skills, versus using the terms "upskilling" and "reskilling." In go-to-market organizations, we see a lot of "reskilling" when you have different roles like SDRs, BDRs, account reps, etc., and you're moving people around.

When it comes to more specific content related to career pathing, it's more about building additional skills and education as a whole.

Q **MICHAEL**

Do you find that time constraints and location constraints are chief challenges for this unique group?

A **JEN**

Well, because we're cloud-based, we've actually been able to, and I think this would be true just in the industry itself, move away from on-premise or live training that requires bringing people into one location. Training has evolved to interactive live sessions, virtual sessions and hosted webinar-style trainings.

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This approach reduces training spend and provides much more versatility. For example, when I train my organizations, I am in three different regions and multiple different time zones. I am able to create a training that can be accessed across the different time zones, so everybody gets the same training instead of one person attending a training and then somebody else getting a readout of the training and having to go through it. It's a recorded session that everybody can watch.

After that, I do coaching and scenario sessions in each region to ensure the content and messaging are being delivered effectively. So the cost of training your organizations has reduced significantly.

The value you can bring and the ability to reach international team members, different time zones, and deskless workers has really elevated the evolution of training to follow the way we work today.



MICHAEL

Do you find that these teams like to see their learning management system integrated with their CRM?



JEN

In a sales organization, the time when you hire an employee or decide they will move into a

new role is critical, especially if the company is growing quickly. The goal is to get new hires identified, trained and productive as quickly as possible.

Historically, if a sales organization had multiple locations, they would have to bring new employees into one central location for training. This was operationally costly and the timing wasn't always ideal, which could impact the business. For example, it could take up to two quarters before a new sales rep was fully effective.

One customer was experiencing this issue. We met with them, defined their needs, and created a program that reduced their time to value for new hires by 22%, directly tied to the training and onboarding process.

A similar challenge exists in support organizations, which often have a tiered structure with level 1 and level 2 support. Traditionally, new support hires would go through 3-6 weeks of in-person training in a group setting. But with more remote work, that is no longer feasible.

Virtual training, whether self-paced or instructor-led, can significantly cut the time to productivity for new support hires — often in half, to 3-4 weeks. This virtual training can also be integrated with onboarding, so new employees can get up to speed on the organization, systems and core competencies more efficiently.

When measuring support agent performance, the focus is often on CSAT. But it's also important to track new hires in their first 45 days, looking at metrics like engagement time and survey results. By tying this data back to the initial training content, you can measure the effectiveness of your onboarding and training programs.

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Overall, the goal is to use virtual and integrated training approaches to bring new hires up to speed faster, with less operational cost, and tie that directly to quality and performance metrics. This allows organizations to do more with less and continuously improve their training effectiveness.

Q **MICHAEL**

How difficult is it to make the connection from learning to specific business metrics like employee satisfaction, productivity, customer service, cost savings, and NPS?

A **JEN**

In my previous experience, I've purchased Litmos three times to bring into my customer organizations for a very specific reason. When you buy Litmos, you get the platform, but you also get access to their content. So instead of having to buy a platform and then create my own content or source it elsewhere, I can do it all in one system.

Beyond that, if I do want to create my own content, Litmos provides a content authoring tool that allows me to easily create the specific content I want to express to customer experience organizations. This includes the way we engage with customers, the outcomes we deliver, and how we measure success for our customers.

While I generally enjoy creating my own content, I do sometimes find the technology a bit challenging. However, I'm the type of person who likes to figure things out on my own rather than asking for help.

Over the years, as Litmos' product has evolved, their knowledge content and customer support has also improved. This means that today, I can go in and create a course, publish it into existing learning paths, and push it out to my teams - and I can usually do all of that within 20 minutes, even if I'm multitasking.

For me, the key benefits of Litmos have been the stability of the platform, the quick and easy access to their content, the ability to create my own custom content, and the integration with the other systems I use to track the skilling and up-leveling of my team.

Here are some ways to listen to the interview on Brandon Hall Group's Excellence at Work Podcast:



About Brandon Hall Group™

With more than 10,000 clients globally and more than 30 years of delivering world-class research and advisory services, Brandon Hall Group™ is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.



Professional Certifications

Self-paced certification programs. Virtual group sessions for companies. In-person conferences and summits.

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Individual and Enterprise Membership Options: Includes research assets, advisory support, a client success plan and more.

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Custom Research Projects, including surveys, focus group interviews and Organization Needs Assessment for Transformation, Technology Selection and Strategy.

Excellence Awards

Three annual programs recognize the best organizations that have successfully deployed programs to achieve measurable results.

ENTERPRISE EXCELLENCE CERTIFICATION PROGRAM

Recognizes the best HCM programs that transform their organization and achieves breakthrough results. This designation is a step above the HCM Excellence Awards® which focuses on one program within a company. Enterprise Excellence is a hybrid of award winners who are also members.

SMARTCHOICE® PREFERRED PROVIDER PROGRAM

Uniquely places HCM service and technology companies at the top of organizations' consideration list of vendors. It adds an unmatched level of credibility based on BHG's twenty-eight-plus years of experience in evaluating and selecting the best solution providers for leading organizations around the world.

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