

THE 5 METRIC REPORTING FRAMEWORK

How to use this workbook

Customer education teams are under pressure to prove ROI. Whether you're just starting your academy or scaling a mature education function, you need a simple yet comprehensive framework to align with the business and prioritize what matters.

Kevin Dunn from Airtable laid out a crystal-clear model used to guide everything from team focus to executive reporting.

Instructions

- Fill in the blanks as you go.
- Use it as a reporting dashboard template
- Share insights with your executive team to drive buy-in

Repeat every quarter to track progress and adjust priorities

Step 1: Creator Capacity

What it is:

Are you consistently producing and maintaining high-quality content?

Key Metrics:

- number of new courses/videos/tutorials created this quarter
- number of updated/refreshed materials
- % of planned vs. delivered assets

Your Inputs:

- Quarterly content output target: _____
- Actual content shipped this quarter: _____
- of SME collaborations initiated: _____
- Notes on bottlenecks (e.g., approvals, video editing): →

How to Improve:

- Template your production process
- Use iorad to speed up walkthrough capture
- Automate internal communication (e.g., Slack + Airtable workflows)

Step 2: Learner Sentiment

What It Is:

How do users feel about your learning experience?

Key Metrics:

- CSAT / NPS for each course or learning path
- % of users who would recommend your academy
- Qualitative feedback



Your Inputs:

- Average CSAT across all learning paths: _____
- Lowest-rated course (title + CSAT): _____
- Top 3 quotes from feedback:
 - a.
 - b.
 - c.
 - d.
 - e.

How to Improve:

- Automate feedback collection (e.g., end-of-course survey forms)
- Use AI tools to sort, summarize, and prioritize qualitative feedback
- Fix low-rated courses before adding new ones

Step 3: Learner experience

What It Is:

Are users completing courses and taking the right next steps?

Key Metrics:

- Course enrollments → completions (%)
- Average time to complete a learning path
- of multi-course learners

Your Inputs:

- Avg. course completion rate: _____
- Drop-off point for most learners: _____
- % of users enrolling in 2+ courses: _____

How to Improve:

- Break up long videos into bite-sized chunks
- Add loraad tutorials for high-friction steps
- Embed next-step CTAs at key moments

Step 4: Credentials Growth

What It Is:

Are users engaging deeply enough to earn certifications or badges?

Key Metrics:

- Total certifications issued (MoM or QoQ)
- Multi-certified user growth
- Certifications by role/industry (if tracked)

Your Inputs:

- Certifications this quarter: _____
- % of users certified more than once: _____
- Industries/personas with highest cert rate: _____

How to Improve:

- Add certification incentives (e.g., swag, LinkedIn shoutouts)
- Surface success stories in your community
- Create role-specific certification paths

Step 5: Revenue Impact

What It Is:

Is your education content actually impacting business KPIs?

Key Metrics:

- Renewal and retention rates (for trained vs. untrained users)
- Expansion revenue tied to certified accounts
- Sales velocity (how fast educated prospects convert)



Your Inputs:

- % of closed-won deals where users engaged with Academy: _____
- Avg. renewal rate for trained users vs. untrained: _____
- Expansion revenue from certified users/accounts: \$ _____

How to Improve:

- Work with SalesOps to overlay education data with revenue
- Turn Academy into a pre-sales asset (don't gate it)
- Highlight positive trends in exec reports

Scorecard & Action Plan

Use this quick visual tracker to assess where to focus next:

Category	Green	Yellow	Red	Top Priority Action
Creator Capacity	☐	☐	☐	
Learner Sentiment	☐	☐	☐	
Learner Experience	☐	☐	☐	
Credentials Growth	☐	☐	☐	
Revenue Impact	☐	☐	☐	

Final Notes

Start small, iterate fast. You don't need a BI team to get started—just pick two categories, run a pilot, and use the data to justify resourcing and team expansion.