From Cost Center to Profit Engine: Coupa's Customer Education Project

Coupa and LearnUpon

Best Customer Training Program

November 2024

Company Background

Company-at-a-Glance	
Headquarters	Foster City, CA
Year Founded	2006
Revenue	1B
Employees	3000+
Global Scale	Global, all regions
Customers/Output, etc.	Business Spend Management SaaS
Industry	Procurement
Website	www.coupa.com

Company Background

LearnUpon

Company-at-a-Glance	
Headquarters	Dublin
Year Founded	2012
Revenue	Less than $50 million
Employees	250+
Global Scale	LearnUpon is a global company with an HQ in Dublin (IE), and offices in Philadelphia (USA), Salt Lake City (USA), Sydney (AUS), and Belgrade (SRB).
Customers/Output, etc.	LearnUpon partners with over 1,400 customers to champion simple, learner-centric experiences for over 19 million learners across over 35 countries globally. With 290+ employees and offices in Dublin, Philadelphia, Salt Lake City, Belgrade, and Sydney, LearnUpon LMS makes it easy for businesses to deliver learning that impacts what matters.
Industry	Technology & Software
Website	https://www.learnupon.com

Budget and Timeframe

Budget and Timeframe	
Number of (HR, Learning, Talent) employees involved with the implementation?	5
Number of Operations or Subject Matter Expert employees involved with the implementation?	15
Number of contractors involved with implementation	20
Timeframe to implement	6 months
Start date of the program	January 2021

Fit to the Needs

Coupa is the leading business spend management platform, connecting teams and delivering new levels of performance and purpose. It helps teams collaborate to build more agile and sustainable operations, delivering intelligent and responsible spend strategies to meet their companies' purpose.

The development of the customer training program by Coupa was motivated by several key drivers. Firstly, as the leading business spend management platform, Coupa recognized the imperative to equip its extensive customer base with the necessary skills to leverage the platform effectively in order to drive more agile and sustainable operations. With a global community exceeding 3,000 customers and managing over $5 trillion in business spend, the need for more comprehensive training solutions beyond the current ILT offering led by internal trainers became increasingly apparent.

In response to this need, Coupa established an Education Services Team in early 2021, signaling a strategic shift towards leveraging external perspectives to enhance customer training. This shift involved a deliberate move towards digital learning methodologies, including eLearning and role-based training, to better accommodate the diverse needs of customers while reducing reliance on traditional in-person training methods.

Moreover, Coupa's decision to prioritize eLearning and leverage an out-of-the-box eCommerce storefront solution reflects a strategic focus on revenue generation while simultaneously fostering product adoption. This approach not only enhances the learning experience for customers but also capitalizes on the growing market for online training services.

Overview

To facilitate the development of its customer education program, Coupa leveraged their existing internal experience with LearnUpon, creating dedicated portals for both internal and external stakeholders, and extending the external experience to include an eCommerce storefront, which was available out-of-the-box with LearnUpon. The team continued to expand its offerings, introducing more eLearning modules and role-based learning opportunities, while still providing the option for individuals to enroll in virtual instructor-led training courses. This holistic approach ensured that Coupa's customer training program not only met the evolving needs of its clientele but also remained adaptable and responsive to the changing landscape of business management.

The customer training program offered by Coupa is a comprehensive suite of learning solutions designed to empower individuals and organizations with the knowledge and skills needed to optimize their use of the Coupa platform and drive business success. Through a blend of eLearning, instructor-led training (ILT), and certification programs, Coupa provides flexible and accessible learning opportunities tailored to the diverse needs of its customers, led by its Education Services team.

The success of the program, which today generates between $50-90k in monthly eCommerce revenue and $10M a year in overall training revenue, underscores the effectiveness of this strategic decision. The Education Services Team has a 70% margin, meaning that for every dollar of revenue generated, the business retains $0.70 as profit after covering all operating expenses.
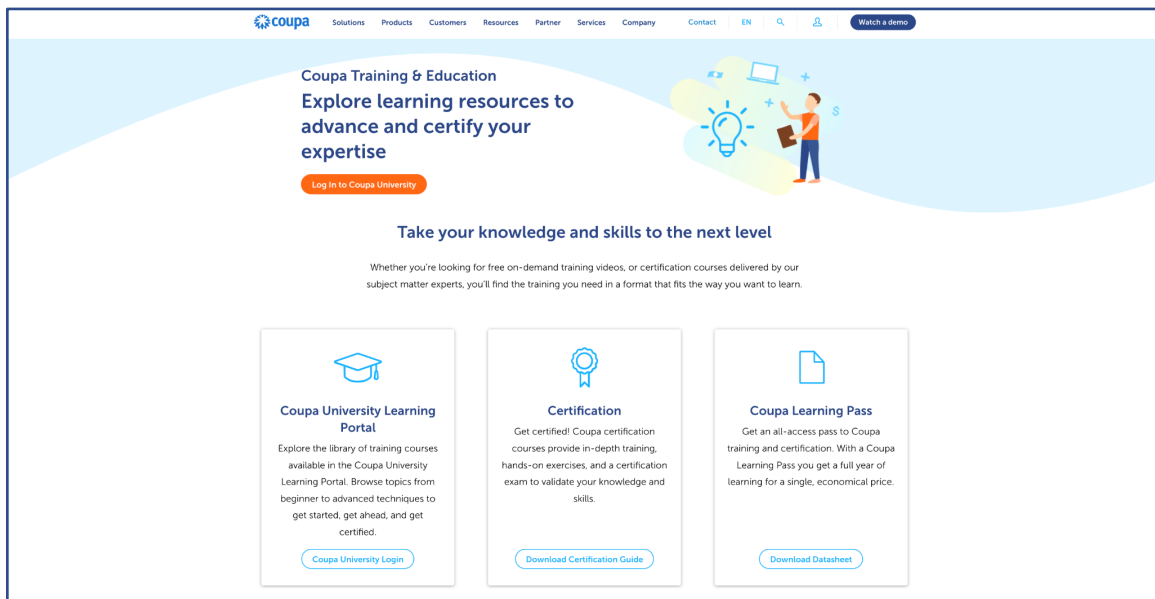

Image: Information about Coupa Training & Education on Coupa Website

Goal 1: Implement a Functional Learning Platform

The initial goal was straightforward: to have a functional learning management system (LMS) capable of delivering content and tracking user progress. With the team's extensive experience of over 20 years in working with LMS systems, the primary focus was on having a solution that simply "worked" and effectively tracked content delivery.

At the heart of the program is Coupa University, powered by LearnUpon, an eLearning engine that hosts a vast library of over 30-40 online certifications and courses. Customers can easily access this content and sign up for partner classes

via an eCommerce storefront. This platform enables individuals to learn at their own pace, from anywhere, and at their convenience.

For those who prefer a more structured approach, Coupa offers various ILT options. Customers can enroll in in-person ILT courses delivered by Coupa Certified Training Partners, either in a public or private setting. Alternatively, they can opt for virtual ILT sessions, benefiting from live instruction without the need for travel. These ILT offerings provide hands-on learning experiences and foster real-time interaction with certified instructors.

Goal 2: Drive Certification Completions

One of the program's highlights is the Coupa Certification (available by role, job function, or product type), which serves as a badge of honor for individuals showcasing their expertise in utilizing the Coupa platform.

Image: Example of certification badge awarded and shared by customer on LinkedIn

One of the most consistent metrics used to measure success was "certification completion", with almost 9,000 certifications issued in FY2024. This metric served as a tangible indicator of customer engagement with the training program. Coupa continuously aimed to drive completion rates, signaling a deeper understanding and utilization of the platform's capabilities.

With a focus on practical, real-world instruction, Coupa certification exams rigorously assess candidates' knowledge and operational proficiency. Upon successful completion, individuals receive digital badges and certificates, symbolizing their commitment to professional growth and excellence within the Coupa community.

Certification Offerings ✷ coupa

Certifications by Role

CATEGORY	COURSE / CERTIFICATION NAME
Administrator	Procure-to-Pay System Administrator Certification
Implementor	Core Implementation Specialist Certification (Partner only)

Special Certifications by Job Function

CATEGORY	COURSE / CERTIFICATION NAME
Procurement	Procurement Specialist Certification
Invoicing	Invoice Management Specialist Certification
Sourcing	Sourcing Specialist Certification
Risk and Supplier Information Management	Risk & Supplier Information Management (SIM) Specialist Certification
Travel and Expense	Travel & Expense Specialist Certification

Certifications by Product

CATEGORY	COURSE / CERTIFICATION NAME
Analytics	Analytics Certification (eLearning)
Contract Lifecycle Management	Core Contract Lifecycle Management Certification (eLearning)
Invoice	Procure-to-Invoice System Administration Certification (eLearning)
	Invoice Management & Reporting Certification (eLearning)
	InvoiceSmash Management Certification (eLearning)
Pay	Digital Payments Certification (eLearning)
	Virtual Card Optimization Certification (eLearning)

Image: Coupa Certification Offerings (Example)

Goal 3: Optimize User Experience for Revenue Growth

To achieve the goal of increasing revenue, Coupa focused on optimizing the user experience and accessibility of the training program. This involved ensuring a seamless online experience, simplifying access to courses, and enhancing the capability of the eCommerce storefront to process enrollments and purchases efficiently.

Moreover, Coupa introduced the Coupa University Learning Pass in 2023, revolutionizing access to expert training. This all-access pass offers unlimited learning opportunities, including premium on-demand courses, all for a single annual price. Learners can explore a rich training curriculum at their own pace, building practical knowledge and certifying their expertise without the constraints of a course-by-course payment model.

Image: Datasheet on Coupa Learning Pass

In a strategic move to expand training accessibility, Coupa transitioned to a partner-led ILT platform, allowing authorized partners to offer ILT classes aligned with Coupa's standards and content. This initiative broadens the reach of training opportunities, enabling customers to enroll in partner-offered classes while maintaining the quality and consistency expected from Coupa's training programs.

The success of the program is reflected in the $10+ million revenue generated by the Education Services team, which represents a significant share of Coupa's overall professional services revenue.

Overall, Coupa's customer training program has made a significant impact on both the customer's organization and Coupa itself. By equipping individuals with the necessary skills and certifications, Coupa enhances the value proposition of its platform, driving deeper adoption and satisfaction among customers. Additionally, the program strengthens Coupa's position as a trusted partner, committed to empowering its community with the knowledge and resources needed to succeed in the ever-evolving landscape of business spend management.

"Our online certification and training offering has increased training consumption, customer loyalty, customer success, product adoption and customer retention, all in one platform. The trick was to build a certification program that customers can get excited about: something that will improve their individual careers and make them a better user of our product. In the meantime, while they get certified, they consume close to 50 percent more training and develop a tighter bond with our product." - Brett Powell, Vice President, Education Services - Coupa

Design of the Program

Coupa's customer training program embodies innovation at every level, meticulously designed to cater to the diverse learning needs of individuals and organizations within the business spend management industry.

At its core is Coupa University, powered by the LearnUpon platform, which serves as a dynamic eLearning engine hosting a comprehensive library of over 30-40 online certifications and courses.

Leveraging LearnUpon enables seamless content delivery and user tracking, ensuring learners have access to valuable resources at their convenience, while providing the Education Services team with valuable insights into usage and revenue.

A Range of Delivery Types That Cater to Different Learning Styles

One of the key innovations of Coupa's training platform lies in its seamless integration of eLearning, instructor-led training (ILT), and certification programs. Through LearnUpon's robust functionality, Coupa offers a flexible and accessible learning experience, allowing users to choose their preferred mode of learning. Whether individuals seek self-paced eLearning modules, hands-on ILT sessions delivered by certified partners, or interactive virtual ILT sessions, Coupa's program caters to every learning style.

Delivery Types

In-Person Instructor-Led

Learn in a hands-on environment delivered by a Coupa Certified Training Partner. We offer two delivery types: Public or private training to meet your delivery needs.

Virtual Instructor-Led

Take advantage of live instruction delivered by a Coupa Certified Training Partner without the expense of travel.

On-Demand

Explore Coupa's eLearning offerings and complete training and certification on your time, from anywhere, at your convenience.
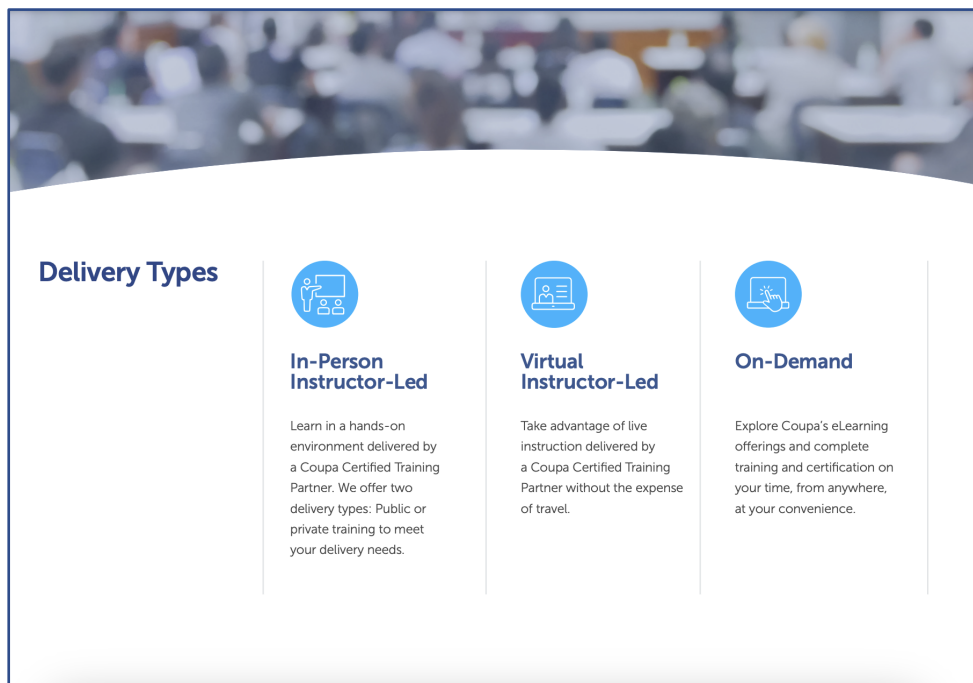
Image: Range of Delivery Types for Certification Programs

Through a partner-led model, customers can enroll in classes with authorized partners. This initiative broadens the reach of training opportunities, enabling customers to enroll in partner-offered classes while maintaining the quality and consistency expected from Coupa's training programs. LearnUpon's ILT Center empowers partners to set up ILT webinars hosted on their own platforms, expanding the reach of training opportunities while enabling oversight for Coupa's Education Services team.

Additionally, customers can choose from a vast library of over 30-40 online certifications and courses to learn at their own pace, from anywhere, and at their convenience. Through LearnUpon's robust course creation tools, including support for SCORM files from platforms like Articulate Rise, Coupa ensures the seamless creation and delivery of engaging and interactive course content.

eCommerce Storefront, powered by the LMS and workflow integrations

A notable aspect of Coupa's training platform is its eCommerce storefront, powered by LearnUpon. This storefront simplifies the enrollment process, allowing users to easily sign up for courses and partner classes.
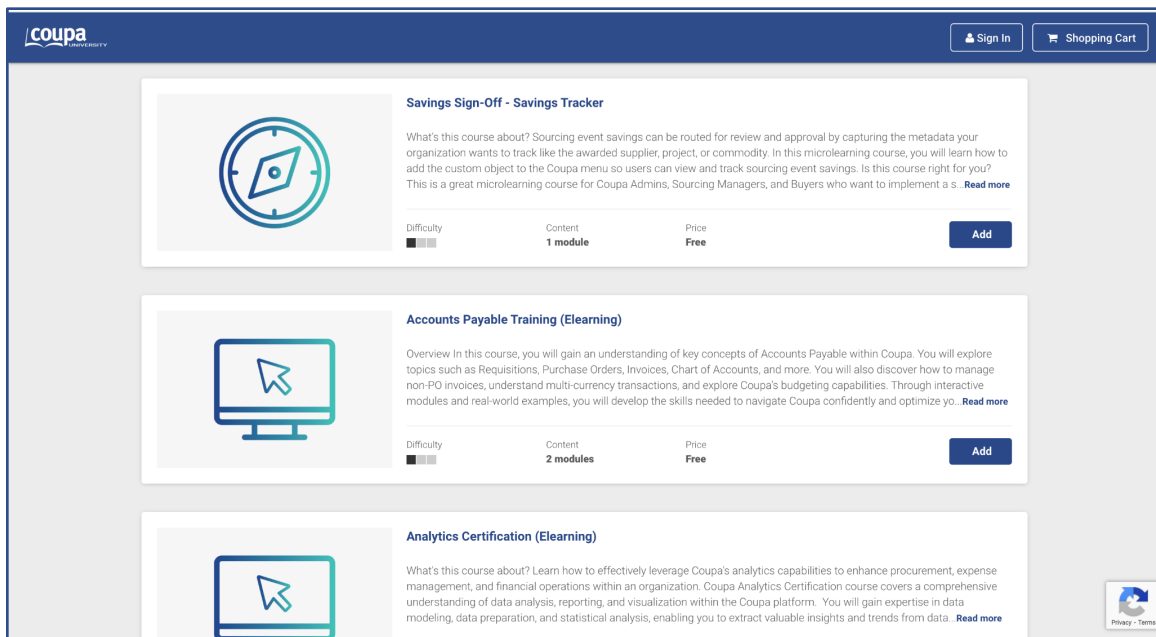

Image: Coupa University storefront

LearnUpon's eCommerce capabilities enable secure transactions and streamline course purchases, enhancing the overall user experience and driving engagement. And, by leveraging Okta SSO, customers gain seamless access to the Coupa University Learning Portal directly from their Coupa Portals Dashboard.

Achieving this involves several steps facilitated by automated workflows and integrations between Salesforce, Okta, and LearnUpon, and invisible to the customer:

1. Firstly, the Salesforce user is linked to the Contact in Salesforce, facilitated through the Salesforce integration. Contacts or designated support contacts also gain the ability to add records through a self-service feature.

2. Each Contact record automatically provides access to the Okta portal.

3. Okta then assigns the new user to various groups, each granting access to different systems, including to the Coupa University Learning Portal powered by LearnUpon.

4. This process includes the creation of the user record in LearnUpon and integration of additional fields, such as user type and Salesforce ID to auto-provision access to relevant customer groups in LearnUpon. Upon creation, the customer receives an activation email containing a link to proceed.
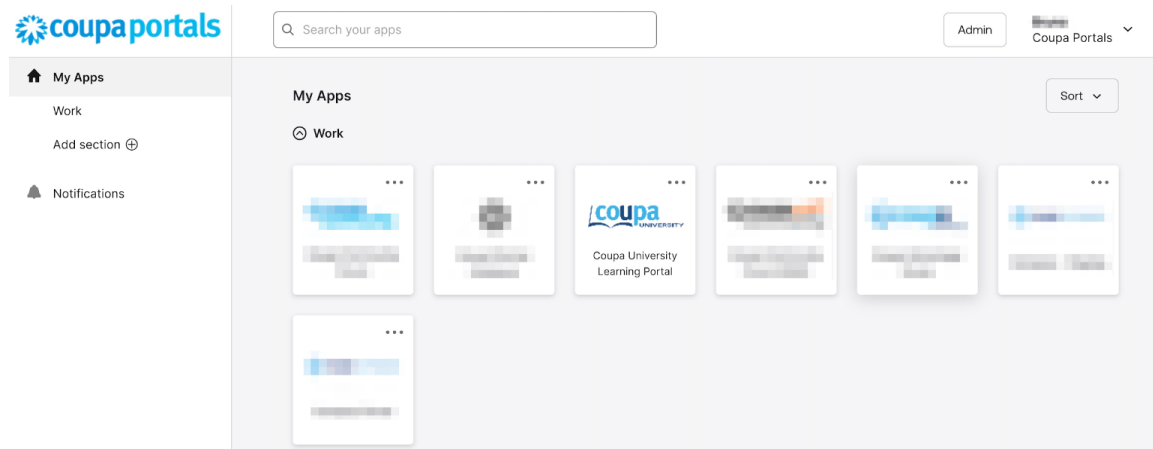
Image: Coupa Portals Dashboard

Introduction of the Coupa Learning Pass

One of the innovations in the design of Coupa's customer education program is the Coupa Learning Pass, an all-access pass offering unlimited learning opportunities. Learners can explore a rich training curriculum at their own pace, building practical knowledge and certifying their expertise without the constraints of a course-by-course payment model.

Customers can access this in one of two ways:

1. Through the eCommerce storefront, or

2. As part of their onboarding process with access provisioned for nominated users by client support agents

To minimize the need for manual intervention, while still maintaining a high level of service and user experience for customers, the team at Coupa leverages Zapier workflows together with several LearnUpon features to automate these processes.

Where a customer wants to purchase a Learning Pass, the process is fully automated and operates in real-time as follows:

1. The customer visits the eCommerce storefront powered by LearnUpon and adds 'Coupa Learning Pass' to their cart. To complete their purchasing transaction they check out using a card.

2. In a matter of seconds, Zapier captures the purchase transaction message (hook) in Webhooks, leveraging a GET API call to read message posted using the Webhook ID from the LearnUpon portal.

3. Filters are applied to ensure that the process continues only if the line item name contains 'Coupa Learning Pass' and matches 'purchase completion'.

4. Date/Time formats are transformed to indicate the expiration date, adjusting for different subscription options such as 12, 24, and 36 months.

5. Branches are created for each subscription option in Zapier, ensuring relevant expiration times are added.

6. LearnUpon is prompted to conduct a User Search, locating the user record created via Okta Single Sign-On (SSO).

7. All information is consolidated and updated in the LearnUpon database through a PUT API call. This includes updating the user's membership type in LearnUpon to 'Coupa Learning Pass', along with custom fields indicating the plan duration (12, 24, 36 months), start and expiry dates, and transaction ID for reference.

8. The Group ID in LearnUpon is searched to assign the user to the relevant 'Coupa Learning Pass' group, with access to associated courses, and triggering a custom notification to inform them of their enrollment.
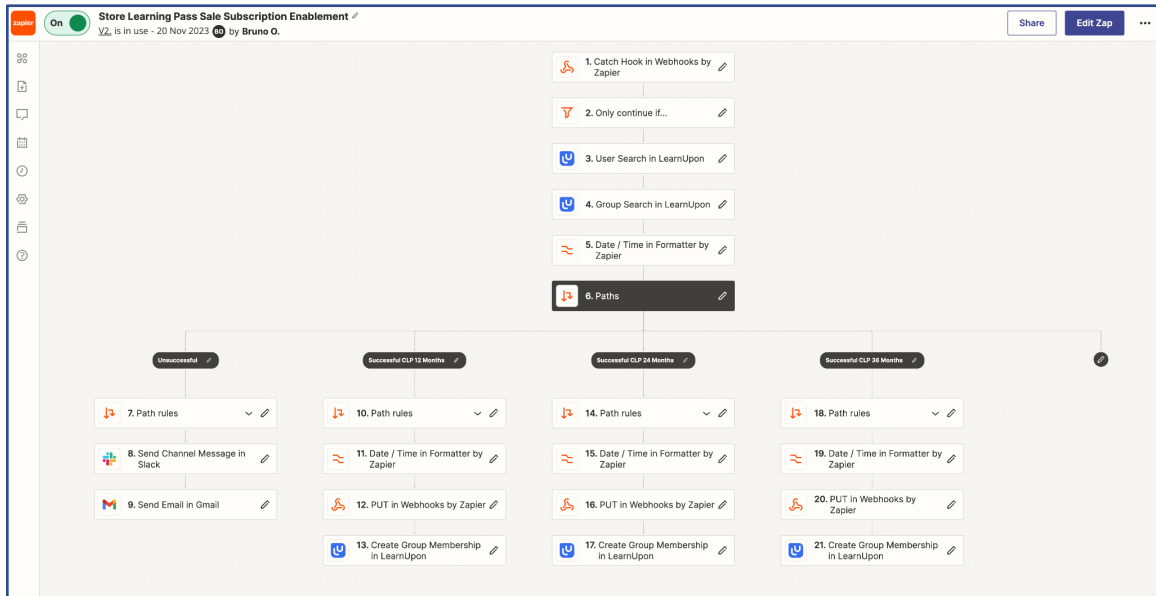
Image: Zapier automation for Learning Pass Sale subscription enablement:

Image: Custom User Data on a learner's profile in LearnUpon, updated through Zapier workflow

Where a customer has access to one or more Learning Passes as part of onboarding, they work closely with their nominated client support agent to create these enrollments at the right time depending on where the customer is in their program. To enable automation whilst still maintaining a really personal service, this process is automated where possible:

1. The agent accesses a pre-formatted Google Sheet to provision learning, they fill out a row with relevant information and select 'Import to LearnUpon'

2. Zapier workflow automation is initiated, connecting to Google Sheets to retrieve the data.

3. LearnUpon is prompted to conduct a User Search, locating the user record created via Okta Single Sign-On (SSO).

4. The course name is provided in an HTML-friendly format, utilizing URL coding, enabling API calls on the course name through a GET call in the API.

5. The workflow splits into two paths:

   a. In the successful path, an enrollment is created in LearnUpon, and the row in the spreadsheet is updated to reflect the success of the job, and triggering a custom notification to inform the customer of their enrollment.

   b. In the other path where the process fails, an email is dispatched to the agent ticketing queue to be addressed.

Streamlined Certification and Badge Reward System

Through seamless integration with Accredible via Zapier, the Coupa team has created an advanced workflow to automates the certification process in LearnUpon.

1. When a course enrollment is completed, Zapier receives a trigger. The data is then filtered to include only successful completions, excluding failed attempts and irrelevant courses. Using the Course Reference Code, Zapier matches the course in LearnUpon with its Accredible identifier.

2. Subsequently, Zapier searches for corresponding groups in Accredible based on the Course Reference Code. If successful, the process proceeds to locate the user's email within LearnUpon.

3. Finally, the system creates a credential by generating a badge in Accredible. It extracts relevant customer data to update the badge and applies tags within LearnUpon for streamlined tracking and management.

This automated workflow ensures accuracy and efficiency in certification management while minimizing manual intervention.

Learners are rewarded with digital badges upon certification, showcasing their expertise and commitment to professional growth. Sharing these badges on social media fosters a sense of pride and recognition among learners, further motivating engagement with the training program.

Image: Example of certification badge awarded

Delivery of the Program

The deployment of Coupa's customer training program to its audience was executed through a strategic and comprehensive approach aimed at maximizing accessibility and engagement. Leveraging the capabilities of LearnUpon's platform, Coupa ensured the seamless delivery of training content to its diverse audience.

Coupa University, powered by LearnUpon, served as the central hub for accessing training materials, offering a wide range of online certifications and courses tailored to the needs of individuals and organizations within the business spend management industry.
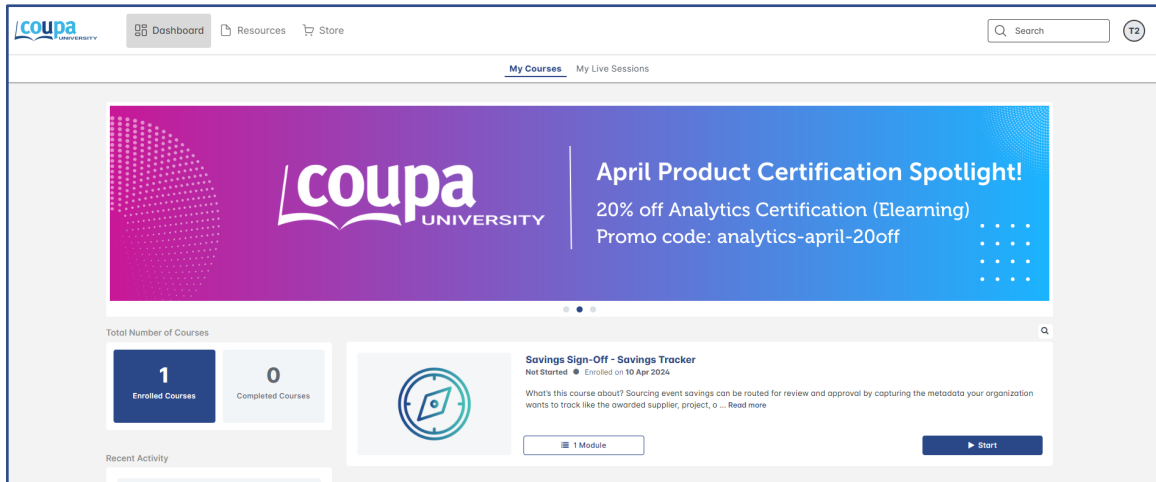
Image: Example of learner's view of Coupa University

Through the Coupa website and dedicated training and education webpage, learners could easily access Coupa University and sign up for courses.

Moreover, the integration of an eCommerce storefront facilitated the enrollment process, allowing users to purchase courses and partner classes with ease. This streamlined approach to enrollment enhanced the accessibility of the training program, enabling learners to engage with the content more efficiently.

The program's deployment strategy also included various delivery options to cater to different learning preferences. Learners had the flexibility to choose between eLearning modules, instructor-led training (ILT) sessions, and virtual ILT sessions, depending on their schedule and preferences. This diverse range of delivery options ensured that the training program could accommodate the needs of a broad audience, allowing individuals to learn at their own pace and convenience.

Coupa also extended the reach of its training program by empowering partners through LearnUpon's ILT Center. Partners could set up ILT webinars on their own platforms, expanding the reach of training opportunities while maintaining oversight for Coupa's Education Services team. This collaborative approach enabled Coupa to leverage its network of partners to extend the reach of its training program, ensuring that it reached a wider audience and maximized its impact.

In addition to the aforementioned strategies, the team implemented a proactive change management approach to effectively communicate with customers during the transition away from the internal ILT offering. Leveraging the LearnUpon platform and direct outreach channels led by the Customer Education Director, a targeted communication campaign was executed, with a particular focus on customers currently undergoing training ("in flight"). Additionally, the Education Services team collaborated closely with the Marketing team to amplify the partner offering, ensuring maximum visibility and adoption.

Despite affecting 500 customers, the transition encountered minimal resistance, highlighting the success of the communication efforts. Customers were notably impressed by the expanded offerings and the seamless transition to eLearning alternatives in LearnUpon. This proactive approach not only facilitated a smooth transition but also reinforced customer satisfaction and confidence in the training program.

"The most useful thing about this course was the structure. The course does a great job of introducing the functionality of the tool and then dives into various use cases that could be leveraged for reporting and analytics needs. Well done!" - Feedback from a Coupa customer

"What I found most useful in this course was learning how to generate and customize reports in Coupa. The clarity of the instructions and hands-on practice with report customization provided me with a solid understanding and confidence in using these tools. Thank you for delivering such practical and valuable content!" - Feedback from a Coupa customer

Measurable Benefits

The organization prioritized several measurable benefits to gauge the impact and ROI of the customer training program. This facilitated informed decision-making and continuous improvement efforts to optimize the program's impact on customer outcomes and organizational goals.

Certification Completions:

Completion rates served as a fundamental indicator of engagement and proficiency among learners, with almost 9,000 certifications issued in FY2024. This metric served as a tangible indicator of customer engagement with the training program. Monitoring the number of enrollments and participation rates across various certifications also helped to identify popular topics and delivery methods.
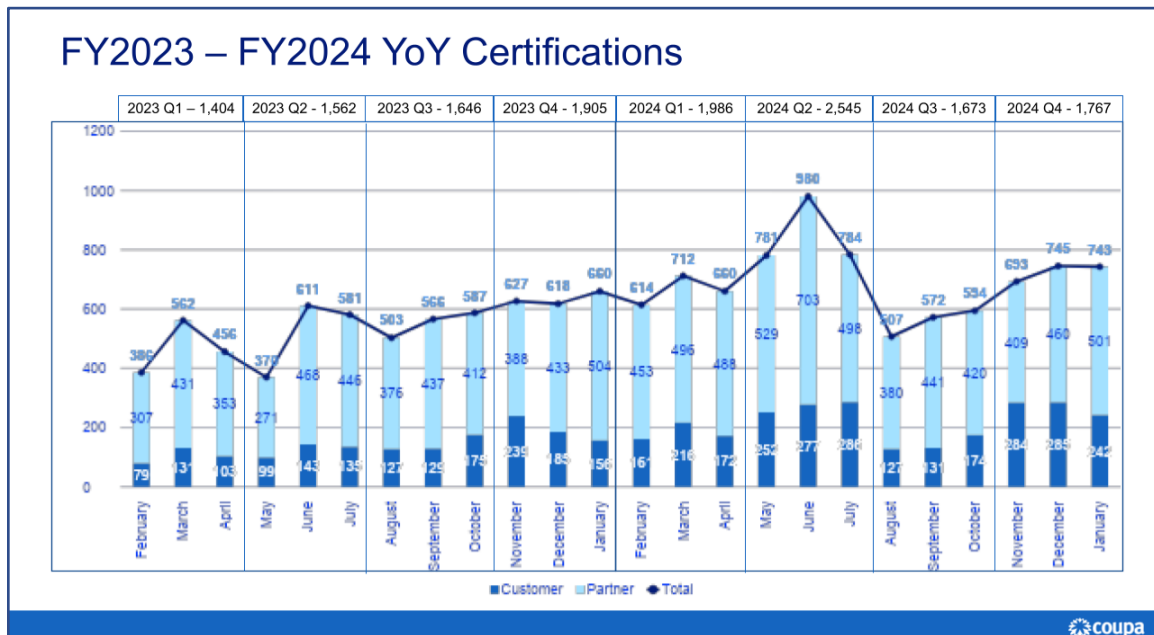

Image: YoY comparison of certifications issued for FY2023 & FY2024
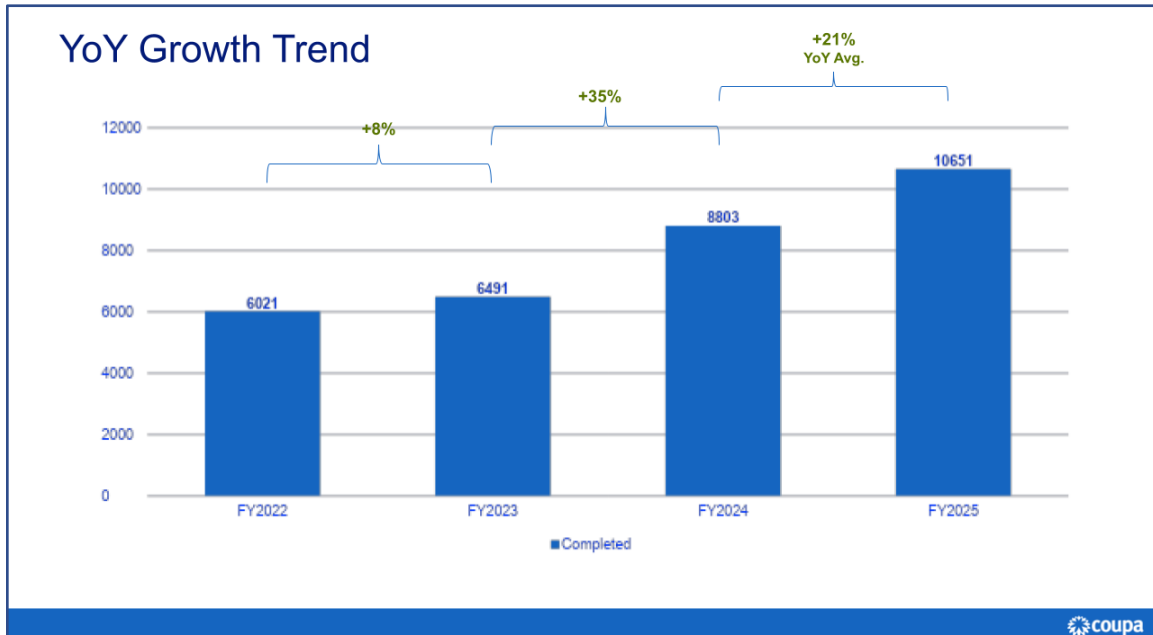
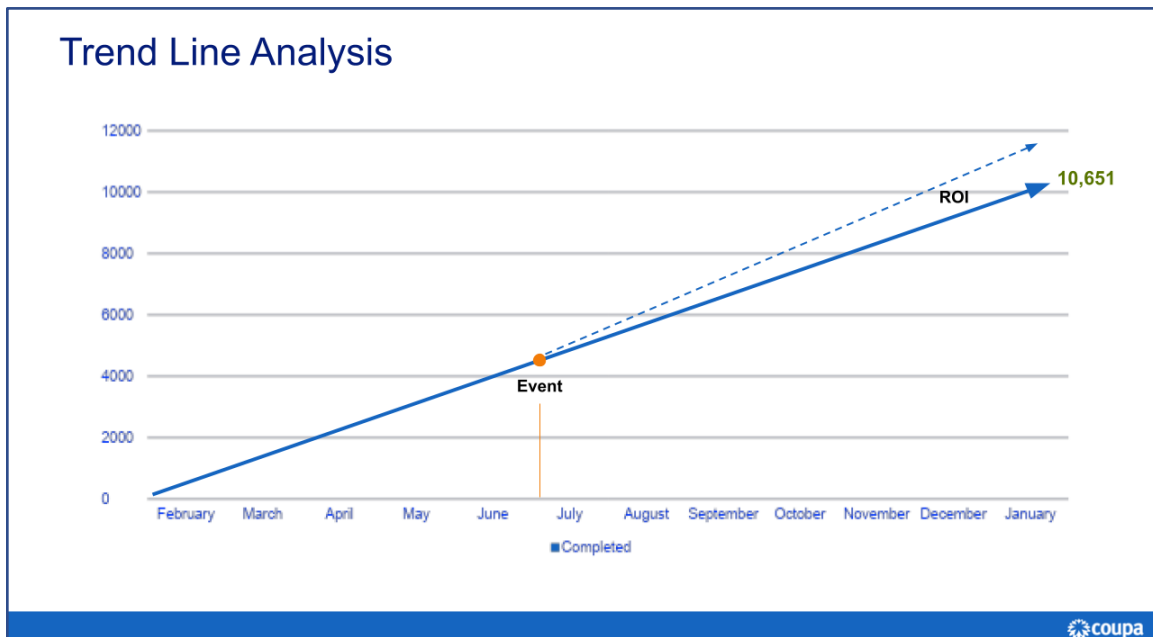Image: YoY Growth Trend for certifications issued

Image: Trend Line Analysis for certifications issued

In addition to monitoring learning completion data in the LMS, leveraging a data feed into Salesforce through LearnUpon's integration links course enrollment data with customer contact records. This integration provides valuable insights into the correlation between course participation and customer interactions, facilitating data-driven decisions to refine training programs and drive organizational growth.
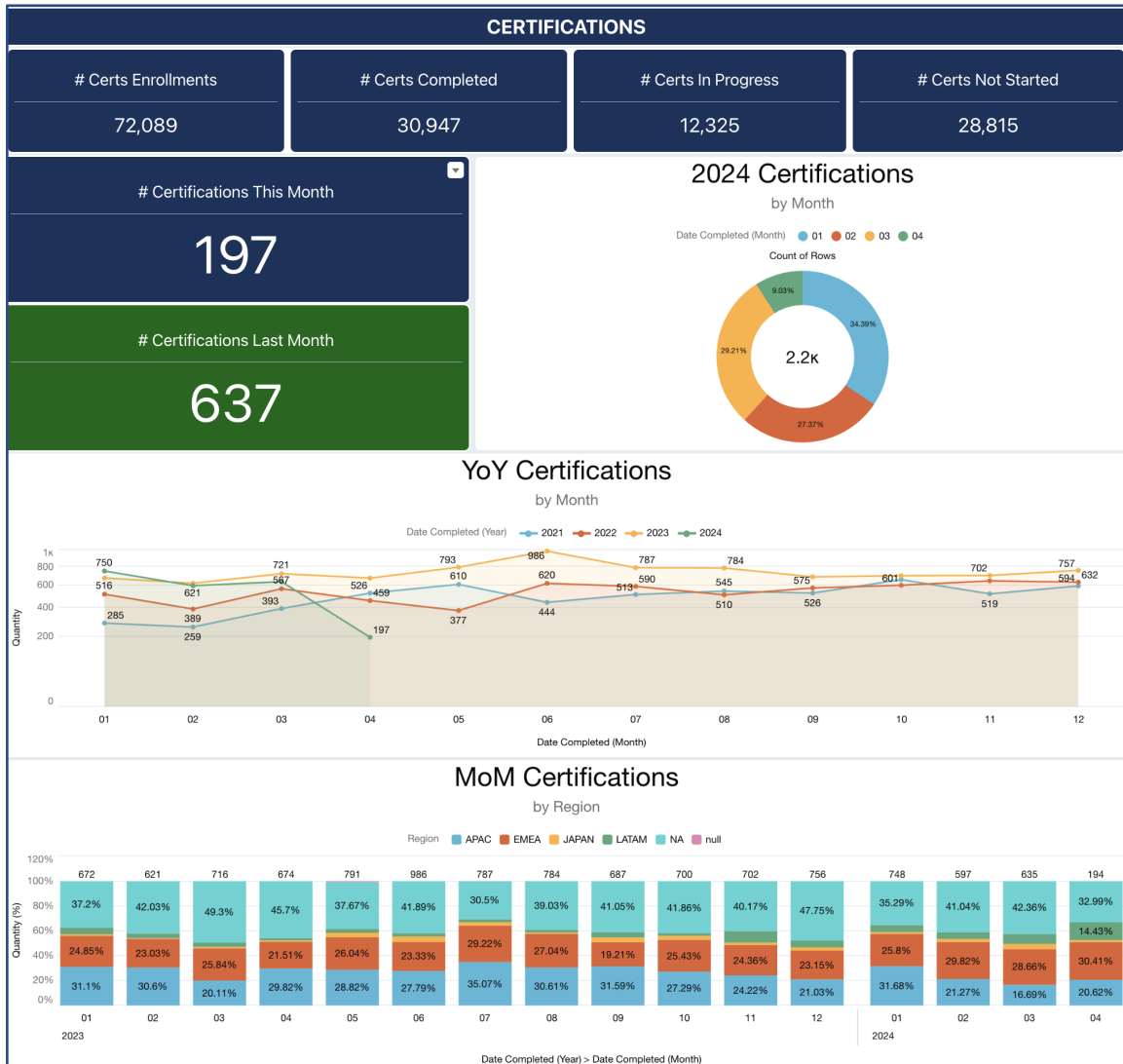
Image: Certifications Dashboard in Salesforce, updated through LearnUpon's integration

Revenue Generation & Financial ROI

Financial metrics, such as revenue generated compared to program costs, were used to calculate the ROI of the training program. Positive ROI indicated that the program was financially viable and contributing to the organization's bottom line.

The success of the program is reflected in the $10+ million revenue generated by the Education Services team, which represents a significant share of Coupa's overall professional services revenue.

Today, the program generates between $50-90k in monthly revenue, and the Education Services Team has a 70% margin, meaning that for every dollar of revenue generated, the business retains $0.70 as profit after covering all operating expenses and is generating revenue for the business.
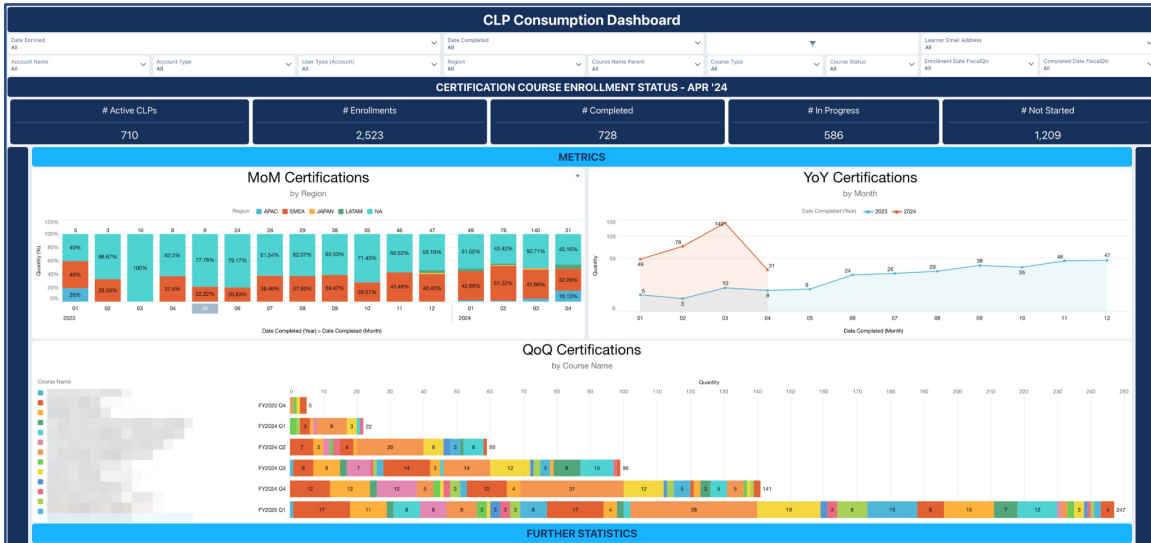

Image: Coupa Learning Pass Dashboard in Salesforce, updated through LearnUpon's integration

Overall

Several valuable lessons were learned through Coupa's experience leveraging LearnUpon for customer education:

1. **Strategic Integration:** Integrating the training platform with existing systems and workflows is essential for seamless operations and user experience. With this in mind, the Education Services team is exploring how they can leverage LearnUpon functionality to embed the platform within the Coupa application itself as a training tab to reach day-to-day users.

2. **Revenue Potential:** Recognizing the revenue-generating potential of customer education can transform the training program from a cost center to a valuable asset, contributing to business growth and success. Not resting on the success to date, one of the avenues they are exploring to drive more revenue is splitting tenants to offer additional portals to Enterprise customers with more complex needs, which would have a more customized look and feel.

3. **Continuous Improvement:** Ongoing evaluation and optimization, guided by user feedback and performance metrics, is imperative for ensuring its

ongoing relevance and effectiveness. To this end, the Education Services Team is committed to enhancing online eLearning content and partner-led ILT sessions, leveraging user insights and available resources facilitated by the LearnUpon platform such as AI functionalities and refined learning pathways.

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