meltingspot

EBOOK

Micro-learning, product tours, webinars, checklists: the right tactics to accelerate your customer training

About this guide

In today's ultra-competitive SaaS landscape, **product adoption, user education, and Customer Success** efficiency have become strategic levers to accelerate **customer activation, improve retention, and drive growth**. Yet, many companies stack tools without a clear vision, leading to **overloaded CS teams, limited feature adoption, and a fragmented customer experience.**

Over the past months, one question has consistently come up from our customers and partners:

"Where does MeltingSpot stand compared to Digital Adoption Platforms (DAPs)? And how does our platform fit within an existing stack?"

This guide was born from these discussions. **Our goal: to help you structure a coherent and effective tech stack** by clarifying MeltingSpot's unique role as an **embedded Learning Management System (LMS)**—a solution that complements DAPs and other tools in your ecosystem.

By **bringing customer education directly inside your software**, MeltingSpot offers a holistic approach to product adoption and Customer Success. This guide will help you explore the available solutions, identify synergies, and build an optimized stack for successful product adoption and scalable Customer Success.

WHO IS THIS GUIDE FOR?

Software company leaders, as well as their Product and Customer Success teams, who want to optimize their tech stack to drive both product adoption and CS performance.

We will explore **existing solutions**, break down **their strengths and limitations**, and provide **a clear methodology for building the ideal stack around MeltingSpot (...or not!)**, while integrating with other key market solutions.

Introduction

Why a well-structured CS Stack is essential?

The Reality: a messy tool Stack with no clear strategy

Today, many software vendors rely on a mix of tools to manage product adoption, user training, and customer engagement: **Helpdesk solutions, LMS platforms, Digital Adoption Platforms (DAPs), Knowledge Bases, Community & Forum Platforms, Product Analytics Tools, CRM systems, and more.**

However, these tools are often deployed without a **cohesive strategy**, leading to several key issues:

❌ **Duplication of efforts** – Multiple tools serving overlapping functions.	❌ **Fragmented user experience** – Customers have to navigate between disconnected systems.
❌ **Overloaded CS teams** – More time spent managing tools than actually supporting users.	❌ **Lack of clear oversight** – No consolidated view to measure the real impact of each solution.

An integrated approach for scalable Customer Success

Rather than stacking tools without a long-term vision, a well-structured tech stack should:

✔ **Align CS and Product goals** to maximize adoption impact.	✔ **Reduce data silos and fragmented customer journeys** through smart integrations.
✔ **Enable users to learn in the flow of work** with a *just-in-time learning* approach.	✔ **Give CS and Product teams a unified view of product adoption** with actionable insights.

The Promise of this guide: helping you build a high-impact stack*

*With or without MeltingSpot – Even if you don't choose MeltingSpot, you'll walk away with a clear overview of the solutions available on the market.

This guide will help you:

▶ **Map out existing solutions** and understand their strengths and limitations.

▶ **Structure a tech stack that fits your needs**, based on your specific use case.

▶ **Optimize the integration of a new tool (whether it's MeltingSpot or another solution)** within your existing ecosystem.

Need help structuring your approach?

→ **LET'S TALK**

Part I | Mapping out solutions for Product Adoption & Customer Success

In this section, we'll explore the different categories of solutions used by **Product and CS teams** to improve user adoption, engagement, and training. We'll break down **who does what**, their **strengths and limitations**, and how they fit into a high-performance tech stack.

1.1. The 3 main categories of solutions

To structure a Customer Success & Product Adoption tech stack, **three major solution categories exist**, each addressing specific needs:

1. **Training & education tools** (Guided learning, self-service, and peer learning)

GOAL

Help customers understand and use the product independently.

SOLUTIONS

LMS (Learning Management Systems)
→ Structured training (e.g., TalentLMS, Docebo, 360Learning).

Customer Education Platforms
→ Personalized, automated, and in-app learning (e.g., MeltingSpot, Skilljar).

Community Platforms → Peer-to-peer learning and knowledge sharing (e.g., Circle, Discourse, Tribe).

Helpdesk & Knowledge Bases
→ Self-service documentation and FAQs (e.g., GitBook, HelpScout).

2. **Communication & Engagement Tools** (Guidance, engagement, and customer support)

OBJECTIF

Goal: Enable proactive communication with users.

SOLUTIONS

DAPs (Digital Adoption Platforms)
→ In-app guidance (e.g., WalkMe, Pendo, Whatfix).

Email Marketing Tools
→ Customer nurturing and product communication (e.g., Mailchimp, HubSpot).

Customer Engagement Platforms
→ Automate customer interactions (e.g., Braze, OneSignal, Iterable).

Live Chat & Support Ticketing
→ Reactive customer support (e.g., Intercom, Zendesk).

Product Roadmap Tools
→ Communicate product updates (e.g., Canny, Aha!, Productboard).

3. **Analytics & Optimization Tools** (Tracking adoption and anticipating user needs)

GOAL

Measure product adoption and customer engagement.

SOLUTIONS

Adoption Analytics & Product Usage Tracking
→ User behavior analysis (e.g., Amplitude, Mixpanel, Gainsight PX).

Customer Success Platforms
→ Customer relationship management and churn prediction (e.g., Gainsight, Planhat, Totango).
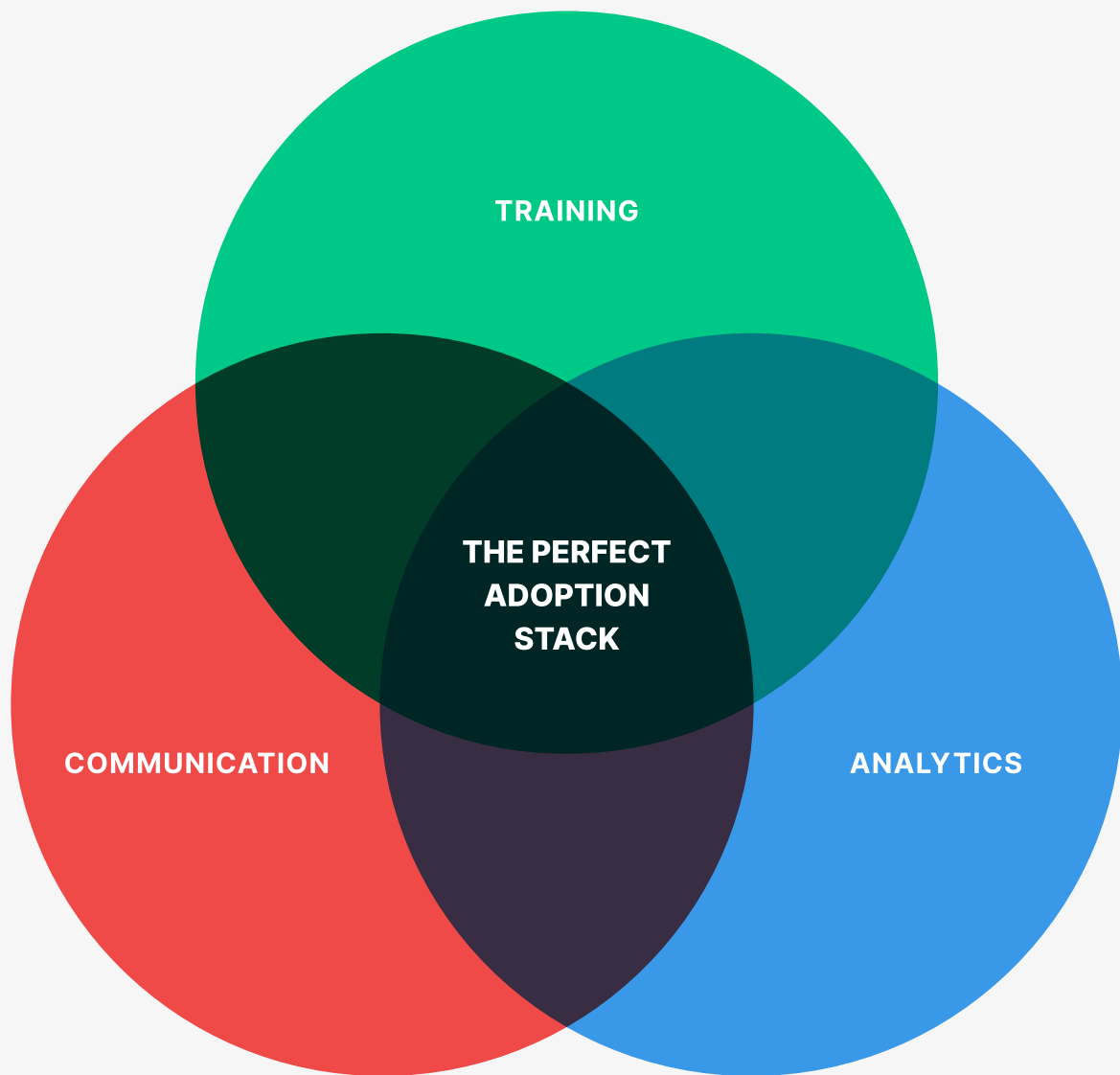
Customer Data Platforms (CDP)
→ Centralize customer data (e.g., Segment, mParticle, Hull).

Feedback & Voice of Customer (VoC) Tools
→ Collect customer insights (e.g., Deel, Qualtrics, Hotjar, AskNicely).

CRM Tools
→ Customer relationship & pipeline management (e.g., Salesforce, HubSpot, Sellsy).

1.2. Mapping out solutions by category

1. Training & Learning Tools

LEARNING MANAGEMENT SYSTEMS (LMS)

GOAL

It's important to differentiate between Corporate LMS and Customer LMS. While both share the goal of providing a structured framework for training and skill development, the former is specifically designed for employee training, whereas the latter emerged from the need to train customers.

CORPORATE LMS

SAP Litmos   moodle   cornerstone

talent lms   docebo   360learning

STRENGTHS

| Training management, certifications, learner progress tracking. | Well-suited for internal training and soft skills development. |

LIMITATIONS

| Not designed for SaaS customer education. | Disconnected from the product, requiring users to leave the tool. |

Some LMS platforms do not include built-in content creation tools and require a **content authoring** tool for course development.

WHAT ARE CONTENT AUTHORING TOOLS?

Content authoring tools allow businesses to create and structure interactive learning content used in online training. They help build engaging e-learning modules with videos, quizzes, animations, and interactive scenarios.

HOW IS MELTINGSPOT DIFFERENT?

Un Corporate LMS platforms **train users outside the product**, while MeltingSpot **integrates learning directly into the software experience.**

LMS platforms are primarily designed for **long-form, theoretical training**, often used for HR compliance and employee learning.

Customer LMS platforms (like MeltingSpot) enable **contextual, interactive learning**, directly embedded in a SaaS product to educate end-users.

Example

Instead of redirecting users to an external learning portal, MeltingSpot provides an in-app, personalized training experience at the exact moment they need it—without disrupting their workflow.

COMPATIBLE WITH MELTINGSPOT?

✔ **IF YOU ALREADY USE A TRADITIONAL LMS (E.G., LITMOS, MOODLE, TALENTLMS)**

You can potentially **keep your Corporate LMS** during the transition, maintaining long and structured training programs while deploying a Customer LMS **to launch short, actionable learning paths directly integrated into your product**. In the long run, you can fully switch everything to MeltingSpot.

✔ **IF YOU USE MELTINGSPOT AS YOUR PRIMARY LEARNING SOLUTION**

You get a **flexible, interactive, and product-embedded training system**, eliminating friction for users.

CUSTOMER LMS

EXAMPLES

meltingspot   **skilljar**   We're nice to mention them, but they don't really compare!

STRENGTHS

Contextualized and immersive training directly inside the software.	Seamless experience that feels natural for users.	**Automated & personalized learning paths** tailored to user needs.
Built-in content creation capabilities.	Anticipates user learning needs and delivers content proactively.	Highly engaging formats: **live workshops, quizzes, forums, on-demand videos.**

LIMITATIONS

You'll still need to **plan your training content**—but don't worry, we've developed an AI Agent to help!

Have questions?

→ **BOOK A CALL WITH OUR TEAM**

→ EMAIL US AT **ARTHUR@MELTINGSPOT.IO**

→ OR ASK US DIRECTLY IN **OUR WEBSITE CHAT**

HELPDESK & KNOWLEDGE BASE TOOLS

GOAL

Provide users with quick access to resources and answers to their questions without relying on a support agent.

EXAMPLES

GitBook   **Help Scout**

STRENGTHS

Allows users to **find answers independently**.	Reduces **support ticket volume**.	Easy to maintain with a dedicated documentation team.

LIMITATIONS

Not personalized → The same content is shown to all users, regardless of their use case or knowledge level.	**Passive approach** → Users must actively search for information themselves.
Low engagement → Reading static articles isn't always motivating.	**No direct interaction with the user** → Does not trigger proactive educational actions based on user context.

HOW IS MELTINGSPOT DIFFERENT?

A knowledge base **answers user questions**, while MeltingSpot **prevents friction by training users in advance**. In other words, a knowledge base operates on a reactive support logic, while MeltingSpot adopts a proactive training approach to reduce support tickets.

A **helpdesk or knowledge base** allows users to **look up articles** to solve specific issues.

MeltingSpot proactively delivers **learning paths** to help users avoid those issues in the first place.

Example

Instead of waiting for a user to search "How do I configure X?" in a chatbot, MeltingSpot automatically offers a training module before they encounter the issue—either at the right time or the most likely touchpoint.

COMPATIBLE WITH MELTINGSPOT?

✔ **IF YOU ALREADY USE A HELPDESK OR KNOWLEDGE BASE (E.G., GITBOOK, HELPSCOUT):**

You can **keep your knowledge base** for async support while **embedding specific articles into MeltingSpot** for contextual access within the product.

Technical documentation in the knowledge base can serve as a **foundation for building training courses or tutorials**.

Want to see how Yal.ia our AI-powered learning assistant, can help?

✔ **IF YOU USE ONLY MELTINGSPOT**

You benefit from **proactive educational support**, reducing support workload and increasing user autonomy. You also get **1:1 messaging** between your CS team and customers, plus community forums for moderated peer support.

COMMUNITY PLATFORMS & CUSTOMER FORUMS

GOAL

Create a space where users can connect, share experiences, and provide peer-to-peer support (User Generated Content - UGC).

EXAMPLES

Circle   Discourse   Khoros   Vanilla

STRENGTHS

Reduces support tickets by up to 50% by encouraging user-to-user problem-solving.

Facilitates knowledge sharing and best practices.

Helps **CS & Product teams identify recurring issues** and uncover gaps where training content is needed to boost adoption.

LIMITATIONS

Heavily depends on **user engagement** to be effective.

Some companies fear giving too much space for **negative feedback**.

Requires **moderation** to prevent misinformation.

HOW IS MELTINGSPOT DIFFERENT?

A community platform **enables discussion between users**, while MeltingSpot **structures those discussions around educational content and guided adoption paths**.

A community platform is mainly an open discussion space where users **ask questions and share experiences.**

MeltingSpot integrates the community into structured learning paths, linking discussions to **educational content** to reinforce product adoption.

Example

Instead of having an isolated forum on Slack or Teams, MeltingSpot allows users to ask questions directly tied to a course, video, or specific feature, fostering both peer support and structured learning.

COMPATIBLE WITH MELTINGSPOT?

MeltingSpot integrates **in-app learning with community discussion**, eliminating the need to send customers to an external platform. However, the two solutions can work together:

✔ **IF YOU ALREADY USE A COMMUNITY PLATFORM:**

You can **keep your external community** for general discussions while **leveraging MeltingSpot to structure learning-driven interactions**. Or, you can disable community forums in MeltingSpot entirely and activate them later if needed.

Example

Users chat on Discourse, while structured learning and educational resources are hosted on MeltingSpot and integrated into your product.

✔ **IF YOU USE ONLY MELTINGSPOT**

You get a **fully integrated forum experience** tied to **learning paths and training content**, keeping everything in one place.

You can **create private discussion forums for specific user groups**, such as employees from the same company using your software. Imagine a scenario where all users from a client's organization can discuss, ask questions, and exchange best practices **directly inside your product**, instead of relying on scattered email exchanges.

Have questions?

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→ **EMAIL US AT ARTHUR@MELTINGSPOT.IO**

→ **OR ASK DIRECTLY IN OUR WEBSITE CHAT**.

2. Communication & Engagement Tools

DIGITAL ADOPTION PLATFORMS (DAP)

GOAL

Guide users within the product using interactive walkthroughs.

EXAMPLES

STRENGTHS

Helps users navigate the product with **tooltips, pop-ups, and interactive guides**.

Provides **analytics on user interactions** to optimize user journeys.

Enables **in-app messaging personalization** for targeted communication.

LIMITATIONS

Often **intrusive**, leading users to close guides quickly (**85% of users drop off after the first step**).

Does **not provide deep learning** or structured knowledge retention.

High pricing vs. actual usage – Most features are used infrequently (e.g., a survey every six months, banners for major feature releases).

Analytics tend to focus more on **communication reach** rather than in-depth engagement tracking per user or segment.

Short-lived user experience that is **easily forgotten**.

Limited engaging formats (e.g., lacks quizzes and interactive content).

No content creation capabilities – DAPs only display tooltips but do not generate **training materials like webinars or micro-learning content**.

HOW IS MELTINGSPOT DIFFERENT?

A DAP **guides users step-by-step through specific actions**, while MeltingSpot **trains them in-depth for long-term adoption and mastery**.

A DAP is ideal for **showing users how to complete an action** through tooltips or pop-ups.

MeltingSpot goes further by helping users **understand the "why" behind actions and gain a deeper mastery of the product over time.**

COMPATIBLE WITH MELTINGSPOT?

MeltingSpot and DAPs are complementary

✔ **IF YOU ALREADY USE A DAP**

You can **keep your DAP** for onboarding and feature discovery while **adding MeltingSpot** for deeper user engagement and ongoing learning.

✔ **IF YOU USE ONLY MELTINGSPOT**

You benefit from a **more structured and educational approach**, ensuring users build long-term skills rather than just clicking through product tours.

You can **deliver training content directly in-app**, just like a DAP does for guided walkthroughs, but with more in-depth learning.

TICKETING SYSTEMS & LIVE CHAT

GOAL

Provide customers with quick assistance via support tickets or live chat.

EXAMPLES

crisp   INTERCOM   zendesk   freshdesk

STRENGTHS

Fast response time
→ Enables quick answers to customer inquiries.

Centralized support history
→ All customer interactions are logged for reference.

Automated responses
→ Chatbots can handle common and repetitive questions.

LIMITATIONS

Reactive approach
→ Does not help prevent user questions.

High workload for support teams
→ Agents deal with a high volume of repetitive tickets.

Does not facilitate learning
→ Users get a solution but do not necessarily improve their product skills.

HOW IS MELTINGSPOT DIFFERENT?

A Ticketing System **responds to issues**, while MeltingSpot **prevents those issues by proactively educating users**.

A **ticketing system** is designed to **handle support requests after a user encounters a problem**.

MeltingSpot **helps users avoid those problems,** guiding and training them **before they hit roadblocks.**

COMPATIBLE WITH MELTINGSPOT?

✔ **IF YOU ALREADY USE A TICKETING SYSTEM**

You should **keep your ticketing system** for handling complex support cases while using **MeltingSpot to automate learning and reduce repetitive tickets**.

✔ **IF YOU USE ONLY MELTINGSPOT**

You benefit from **proactive education**, reducing the need for constant customer support. However, MeltingSpot does not replace a full support system.

Good news! We will soon offer native integrations with ticketing tools to enhance the user support experience.

CUSTOMER ENGAGEMENT PLATFORMS

GOAL

Automate and personalize user interactions across multiple channels (emails, notifications, in-app messages).

EXAMPLES

braze   OneSignal   ITERABLE

STRENGTHS

Omnichannel communication
→ Ability to send messages via multiple touchpoints.

Advanced personalization
→ Segments users and tailors messaging based on behavior.

Improves retention
→ Automatically re-engages inactive users.

LIMITATIONS

Does not train users
→ Sends messages but does not deepen product understanding.

Risk of overloading users
→ Too many notifications and emails can overwhelm them.

No learning measurement
→ Does not track whether users actually adopt the product after receiving messages.

COMPATIBLE WITH MELTINGSPOT?

✔ **IF YOU ALREADY USE A CUSTOMER ENGAGEMENT PLATFORM**

You can **keep your CEP** for general communication while using **MeltingSpot for structured and engaging user education**.

Example

A Braze email announces a new feature → MeltingSpot provides an interactive learning module inside the product to guide users.

✔ **IF YOU USE ONLY MELTINGSPOT**

- You benefit from **in-app messaging features**, allowing your team to send **1:1 and 1:many** messages. Users receive **in-product and email notifications**, but must return to your software to read and interact with them—bringing them back into your platform at key moments.

PRODUCT ROADMAP TOOLS

GOAL

Centralize product development planning and allow users to give feedback on upcoming features.

EXAMPLES

productboard   Canny   Aha!   roadmunk

STRENGTHS

Clear product evolution roadmap
→ Communicates upcoming changes to users.

Customer feedback collection
→ Allows users to vote and comment on the most anticipated features.

Alignment between Product, CS, and Sales teams
→ Helps prioritize development based on real user needs.

LIMITATIONS

Does not improve product adoption
→ A roadmap informs users about updates but does not help them use new features.

Limited interactivity for learning
→ Users see changes but may not have the resources to master them.

No measurement of feature adoption
→ Does not track how users actually engage with new functionalities.

COMPATIBLE WITH MELTINGSPOT?

✔ **IF YOU ALREADY USE A PRODUCT ROADMAP TOOL**

- You **can keep your roadmap tool for communication and prioritization** while using **MeltingSpot to educate users about new features and track their adoption.**

✔ **IF YOU USE ONLY MELTINGSPOT**

- You benefit from **detailed tracking of new feature adoption**, but without the feedback collection and prioritization capabilities of a dedicated roadmap tool.

Example

*A user votes for a feature on Canny → **Once deployed, they receive a MeltingSpot learning path showing them how to use it.***

Have questions?

→ **BOOK A CALL WITH OUR TEAM**

→ **EMAIL US AT ARTHUR@MELTINGSPOT.IO**

→ **OR ASK DIRECTLY IN OUR WEBSITE CHAT.**

3. Analytics Tools

PRODUCT ANALYTICS & CDP (CUSTOMER DATA PLATFORMS)

GOAL

Measure user engagement to optimize product adoption.

EXAMPLES

imagino Gainsight PX segment

CHURNZERO mixpanel Amplitude

STRENGTHS

Tracks **user behavior and product adoption** with precision.

Detects **at-risk users** (low engagement, potential churn).

LIMITATIONS

No direct action on adoption → Provides insights but does not engage or educate users.

Needs other tools to drive user education and retention → Data alone does not change

COMPATIBLE WITH MELTINGSPOT?

✔ **IF YOU ALREADY USE AN ANALYTICS TOOL**

You can **keep your analytics platform** to detect trends while using **MeltingSpot to take concrete actions on product adoption.**

✔ **IF YOU USE ONLY MELTINGSPOT:**

You benefit from **engagement tracking through the Customer Education Score**, giving you an initial measure of how learning impacts product adoption.

Example

Analytics show that 40% of new users are not activating a key feature → MeltingSpot triggers a targeted learning path at the right moment to guide them.

CUSTOMER SUCCESS PLATFORMS (CS PLATFORMS)

GOAL

Manage customer relationships, track engagement, and automate CS workflows.

EXAMPLES

Gainsight planhat skalin CATALYST Totango

STRENGTHS

Centralizes all customer data (product usage, interactions, account health).	**Helps CSMs track churn risks** and prioritize strategic accounts.	**Automates CS tasks** (playbooks, follow-ups, customer health scoring).

LIMITATIONS

These platforms are essentially **"CS-oriented CRMs" or back-office tools** and lack direct **user engagement and re-engagement capabilities.**	**No built-in learning features** → CSMs must manually send content.	**Mostly designed for high touch models**, making them less suitable for **self-serve/ low-touch strategies**.

HOW IS MELTINGSPOT DIFFERENT?

A CS Platform **analyzes and automates customer interactions**, while MeltingSpot **educates users and scales product adoption**.

A CS Platform helps **manage customer accounts and detect churn risks**.

MeltingSpot enables direct action by delivering training and educational content to drive user engagement.

Example

Planhat can detect that a customer is underutilizing a key feature, but MeltingSpot delivers a learning module to address the issue.

COMPATIBLE WITH MELTINGSPOT?

✔ **IF YOU ALREADY USE A CS PLATFORM**

You can **keep your CS Platform** for monitoring customers and detecting weak signals while **using MeltingSpot to take action through user education**.

Example

A customer flagged as "at risk" in Gainsight automatically receives a targeted educational journey in MeltingSpot to re-engage their users.

✔ **IF YOU USE ONLY MELTINGSPOT**

You benefit from **automated and proactive user education**, which helps prevent inactivity and churn before they become issues.

You can also track **user engagement through the Customer Education Score**, helping you identify at-risk users.

FEEDBACK & VOICE OF CUSTOMER (VOC) TOOLS

GOAL

Measure customer satisfaction and gather user insights to improve the product and overall experience.

EXAMPLES

deel.   qualtrics™   ⚡ hotjar   ✿ Ask Nicely

STRENGTHS

Real-time user feedback collection (NPS, CSAT, surveys, heatmaps).

Identifies friction points in the customer journey.

Provides actionable insights for product improvements.

LIMITATIONS

Delivers insights but does not directly take action on engagement or education.

Can overwhelm teams with feedback if there's no clear action plan.

COMPATIBLE WITH MELTINGSPOT?

✔ **IF YOU ALREADY USE A VOC TOOL**

You can **connect these tools with MeltingSpot** to trigger educational journeys based on feedback received.

✔ **IF YOU USE ONLY MELTINGSPOT**

You gain **educational engagement tracking**, which indirectly measures user comprehension and product adoption.

Exemple

If an NPS survey shows users struggling with a feature, MeltingSpot can automatically offer a targeted training module.

CUSTOMER RELATIONSHIP MANAGEMENT (CRM) PLATFORMS

GOAL

Centralize customer information, track interactions, and manage sales opportunities.

EXAMPLES

salesforce   HubSpot   sellsy   pipedrive

STRENGTHS

| **Centralizes customer data** (interaction history, pipeline, scoring). | **Advanced segmentation** for targeted follow-ups. | **Seamless integrations** with email, support, and marketing automation tools. |

LIMITATIONS

| **Does not support user learning** → Tracks customers but does not facilitate educational engagement. | **Risk of information overload** → A CRM alone does not guide users in product adoption. | **Limited direct impact on product adoption** → Organizes customer data but does not train clients. |

2. Solution comparison: Who does What?

Why this comparison, and why these specific solutions?

These solutions are often mistakenly compared to MeltingSpot. Traditional LMS platforms, DAPs, and ticketing systems serve different purposes, yet they are sometimes perceived as alternatives. To a lesser extent, Helpdesk & Knowledge Base tools, as well as Community & Forum Platforms, are also compared to MeltingSpot as they fall into the broader category of customer training solutions.

CRITERIA	🚀 ONBOARDING Helping users reach value quickly	🎓 TRAINING Teaching users how to use the product	📚 TEACHING Educating users on best practices & "why" a feature matters	🛠 SUPPORT Helping users overcome obstacles
CORORATE LMS (Docebo, 360Learning)	✔ Planned training, outside the product	✔ Structured product courses	✔ Theoretical learning & certifications	✘
CUSTOMER LMS (MeltingSpot, Skilljar)	✔ Interactive, in-app onboarding	✔ Progressive learning directly within the product	✔ Best practices training & strategic adoption	✔ 1:1 messaging with CSMs + smart search in forums & technical docs
DAP (Pendo, WalkMe)	✔ In-app guidance via tooltips & checklists	✘ Provides navigation guidance, not training	✘ Only covers "how," not "why"	✔ Quick interface assistance
TICKETING SYSTEM (Zendesk, Intercom)	✔ Product tours	✘	✘	✔ Reactive support via chat/tickets
HELPDESK & KNOWLEDGE BASE (GitBook, HelpScout)	✘	✘	✘	✔ Self-service documentation
COMMUNITY & FORUM PLATFORMS (Circle, Discourse)	✘	✘	✔ User-to-user knowledge sharing	✔ Community-driven support

KEY TAKEAWAYS

Traditional LMS platforms provide **comprehensive training but operate outside the product.**

DAPs guide users, but they **do not offer structured learning** for deeper feature adoption.

Ticketing Systems react to user issues, but they **do not prevent them proactively**.

Helpdesks answer technical questions, but they **do not provide structured training**.

Community Platforms facilitate **peer learning**, but they **lack structured educational content**.

Have questions?

→ BOOK A CALL WITH OUR TEAM

→ EMAIL US AT ARTHUR@MELTINGSPOT.IO

→ OR CHAT WITH US DIRECTLY ON OUR WEBSITE.

Part II | Structuring your Stack based on your growth stage

Product adoption and Customer Success cannot be truly effective without a structured technology foundation. No matter the stage of a company's growth, it is **essential to have three core pillars:**

1. **A learning tool** to educate users on how to understand and leverage the product.

2. **A communication tool** to engage users and facilitate interactions.

3. **An analytics tool** to track product adoption and adjust strategies.

However, **the choice and sophistication of these tools evolve with the size and maturity of the company**. That's why we have identified **three stack levels**, each corresponding to a key growth stage:

STACK LEVEL	🎓 LEARNING TOOL	📣 COMMUNICAT ION TOOL	📏 MEASUREMENT TOOL
MINIMUM PRODUCT ADOPTION STACK SMBs, early-stage startups	• Customer LMS (Why should I use this feature?)	• Email marketing tool for customer engagement	• CRM to track customer relationships
GROWTH PRODUCT ADOPTION STACK (Scale-ups, high-growth companies)	• Customer LMS (Why should I use this feature?) • Helpdesk (How do I use this feature?)	• Ticketing System, • Email marketing tool	• CRM • Product analytics tool to track adoption
FULL PRODUCT ADOPTION STACK (Enterprises, advanced scale-ups)	• Customer LMS (Why should I use this feature?) • Helpdesk (How do I use this feature?)	• Ticketing System, • Email marketing tool, • Digital Adoption Platform	• CRM, • Product analytics tool, • CS Platform to analyze & optimize customer experience

As the number of clients grows, the stack evolves
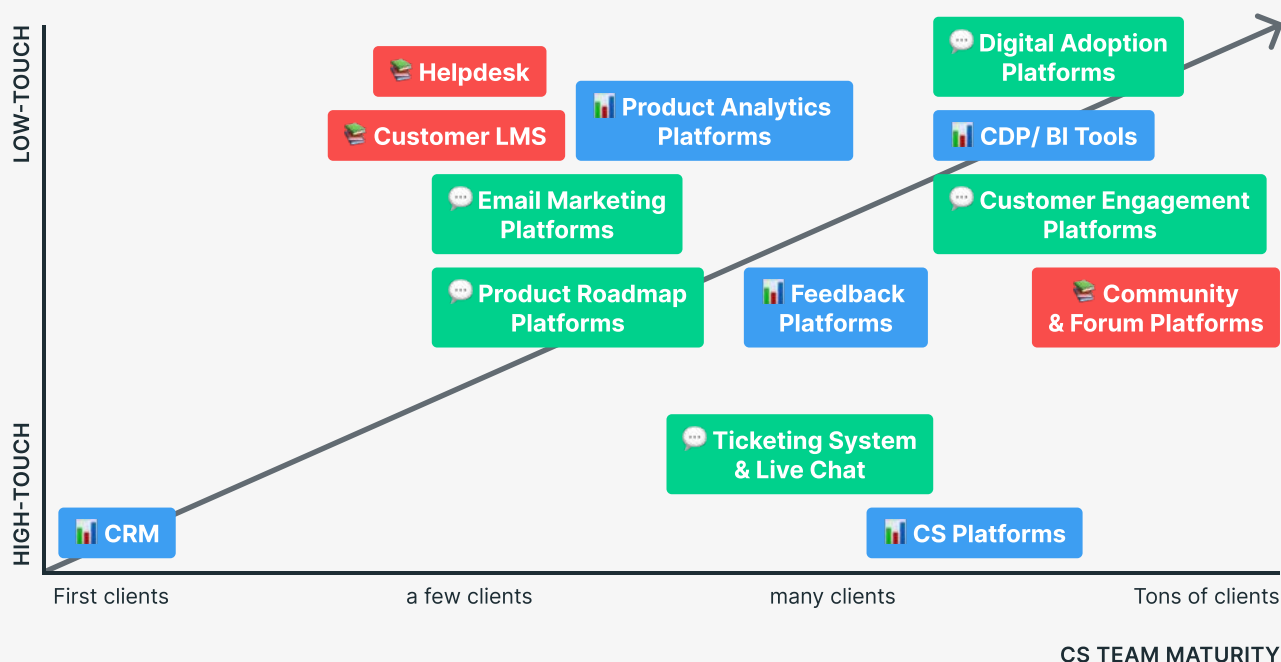
In the next section, we apply the **Full Product Adoption Stack** (the most complete setup) to **various strategic use cases** to demonstrate how **each tool contributes to product adoption and Customer Success**.

For each **use case**, we outline:

1. **The tools used** from the Full Product Adoption Stack.	2. **Examples of industry-leading tools.**	3. **Real-life applications** of each tool to drive product adoption.

1. Ensuring a successful Customer Onboarding

GOAL

Reduce time-to-value and ensure new users immediately understand the product's value.

CATEGORY	TOOL	EXAMPLE COMPANIES	REAL-WORLD APPLICATIONS
🎓 LEARNING	Customer LMS	• MeltingSpot • Skilljar	1. Gamified onboarding journeys with badges & rewards. 2. Personalized courses explaining key concepts, features, and onboarding milestones. 3. Weekly live product sessions introducing new features & best practices, with replays available.
🎓 LEARNING	Helpdesk	• GitBook • HelpScout	1. Dedicated "Getting Started" FAQ available immediately upon activation. 2. In-depth technical articles with embedded tutorial videos.
📣 COMMUNICATION	Ticketing System	• Zendesk • Intercom	1. Automatic ticket creation if a user abandons a key onboarding step. 2. Analysis of the most common tickets to enhance the onboarding experience. 3. Proactive CSM support for new users based on open tickets.
📣 COMMUNICATION	DAP (In-App Guidance)	• Pendo • WalkMe	1. Interactive checklist guiding users step-by-step through onboarding. 2. Contextual pop-ups highlighting key features. 3. A/B testing of tooltips to optimize time-to-value.

CATEGORY	TOOL	EXAMPLE COMPANIES	REAL-WORLD APPLICATIONS
📊 ANALYTICS	CRM	• Salesforce • Sellsy	1. Tracking users who successfully complete onboarding vs. those who struggle. 2. Scoring at-risk accounts requiring human intervention. 3. Automated CSM task creation if a customer is stuck.
📊 ANALYTICS	Product Analytics	• Mixpanel • Amplitude	1. Completion rate tracking for key onboarding steps. 2. Heatmaps to detect where users drop off. 3. Segmentation based on onboarding progress speed.
📊 ANALYTICS	CS Platform	• Skalin • Planhat	1. Engagement scoring based on onboarding interactions. 2. Automatic alerts for high-value customers who lag behind. 3. Cohort tracking to analyze onboarding success rates.

🔗 Optimize your onboarding strategy with our dedicated ebook.

→ DOWNLOAD OUR EBOOK

Have questions?

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2. Driving adoption of key product features

GOAL

Prevent underutilization of critical features and encourage expanded usage.

CATEGORY	TOOL	EXAMPLE COMPANIES	REAL-WORLD APPLICATIONS
🎓 **LEARNING**	Customer LMS	• MeltingSpot • Skilljar	1. Educational modules showcasing advanced use cases. 2. Interactive quizzes to validate feature comprehension. 3. Live training sessions on how to optimize feature usage.
🎓 **LEARNING**	Helpdesk	• GitBook • HelpScout	1. Feature-specific FAQs addressing common questions. 2. Technical documentation with embedded tutorial videos.
📢 **COMMUNICATION**	Ticketing System	• Zendesk • Intercom	1. Identifying customers frequently asking about a feature. 2. Automatically sending training materials to users who submit related tickets. 3. Evolving FAQs based on recurring support queries.
📢 **COMMUNICATION**	DAP (In-App Guidance)	• Pendo • WalkMe	1. In-app pop-ups suggesting relevant features. 2. Unlocking interactive tutorials based on usage level. 3. Personalizing learning paths based on past user behavior.

CATEGORY	TOOL	EXAMPLE COMPANIES	REAL-WORLD APPLICATIONS
📊 ANALYTICS	CRM	• Salesforce • Sellsy	1. Identification of customers who have not activated a key feature. 2. Automatic follow-up by CSMs to offer personalized coaching. 3. Customer maturity score based on product usage.
📊 ANALYTICS	Product Analytics	• Mixpanel • Amplitude	1. Identification of underutilized features versus the most used ones. 2. Tracking feature conversion rates after activation. 3. Detection of user segments that are not progressing.
📊 ANALYTICS	CS Platform	• Skalin • Planhat	1. Health score adjusted based on the usage of strategic features. 2. Alerts on accounts that have never tested a key feature. 3. Tracking customer cohorts and product adoption patterns.

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3. Converting freemium users into paying customers

GOAL

Maximize activation and guide freemium users toward the paid version.

CATEGORY	TOOL	EXAMPLE COMPANIES	REAL-WORLD APPLICATIONS
🎓 LEARNING	Customer LMS	• MeltingSpot • Skilljar	1. Interactive courses explaining premium feature benefits. 2. Weekly live demo sessions of the full product. 3. Premium feature highlights embedded in all micro-trainings for free features ("Go further"). 4. Automated, contextualized onboarding and training paths based on user actions.
🎓 LEARNING	Helpdesk	• GitBook • HelpScout	1. Articles detailing differences between freemium and premium versions. 2. "Upgrade" buttons embedded in help articles.
📣 COMMUNICATION	Ticketing System	• Zendesk • Intercom	1. Auto-creating a ticket when a freemium user asks about pricing. 2. Proactive outreach by a CSM when a freemium user shows high engagement. 3. Invitation to a product discovery session after a support interaction.
📣 COMMUNICATION	DAP (In-App Guidance)	• Pendo • WalkMe	1. In-app banners highlighting locked premium features. 2. Auto-triggered trial when a user frequently interacts with a paid feature. 3. Pop-ups explaining the benefits of upgrading after a certain level of engagement.

CATEGORY	TOOL	EXAMPLE COMPANIES	REAL-WORLD APPLICATIONS
📊 **ANALYTICS**	CRM	• Salesforce • Sellsy	1. Identifying high-intent leads based on engagement thresholds. 2. Segmenting freemium users by usage level. 3. Auto-assigning a sales rep when a user reaches a key activity milestone.
📊 **ANALYTICS**	Product Analytics	• Mixpanel • Amplitude	1. Identifying the most-used features by users who convert. 2. Analyzing behavior differences between paying and freemium users. 3. Tracking the optimal moment to offer an upgrade.
📊 **ANALYTICS**	CS Platform	• Skalin • Planhat	1. Conversion scoring based on user activity. 2. Identifying accounts needing a sales push. 3. Analyzing conversion blockers through support tickets and user feedback.

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4. Scaling Customer Success with digitalization

GOAL

Deliver scalable and efficient CS experiences, especially for low-touch customers.

CATEGORY	TOOL	EXAMPLE COMPANIES	REAL-WORLD APPLICATIONS
🎓 **LEARNING**	Customer LMS	• MeltingSpot • Skilljar	1. Self-guided customer academy with certifications. 2. On-demand recorded webinars. 3. Interactive courses tailored to user needs.
🎓 **LEARNING**	Helpdesk	• GitBook • HelpScout	1. Dynamic FAQs with auto-suggestions. 2. Enriched documentation with videos and demos.
📣 **COMMUNICATION**	Ticketing System	• Zendesk • Intercom	1. Prioritization of tickets based on urgency and impact. 2. Auto-escalation of complex requests to CSMs. 3. Analyzing recurring tickets to enhance self-service resources.
📣 **COMMUNICATION**	DAP (In-App Guidance)	• Pendo • WalkMe	1. Contextual messages reinforcing best practices. 2. Interactive guidance for advanced features to reduce unnecessary tickets. 3. In-app notifications encouraging feature discovery.

CATEGORY	TOOL	EXAMPLE COMPANIES	REAL-WORLD APPLICATIONS
📊 ANALYTICS	CRM	• Salesforce • Sellsy	1. Segmentation of low-touch vs. high-touch customers. 2. Identifying at-risk companies based on product usage. 3. Automating personalized learning recommendations.
📊 ANALYTICS	Product Analytics	• Mixpanel • Amplitude	1. Tracking engagement with training content. 2. Identifying underutilized features requiring more support. 3. Analyzing customer journeys to refine learning resources.
📊 ANALYTICS	CS Platform	• Skalin • Planhat	1. Health scoring based on self-learning resource engagement. 2. Automated alerts for accounts needing human intervention. 3. Detecting high-value customers requiring deeper support.

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5. Monetizing Customer Success (Billable CS)

GOAL

Transform Customer Success into a profit center with premium services.

CATEGORY	TOOL	EXAMPLE COMPANIES	REAL-WORLD APPLICATIONS
🎓 **LEARNING**	Customer LMS	• MeltingSpot • Skilljar	1. Free initial training resources, allowing CS teams to focus on high-touch, paid customers. 2. Exclusive webinars for premium customers (VIP subscription). 3. Paid 1:1 coaching sessions directly accessible via the platform.
🎓 **LEARNING**	Helpdesk	• GitBook • HelpScout	
📣 **COMMUNICATION**	Ticketing System	• Zendesk • Intercom	1. Auto-creating premium tickets for customers on a paid plan. 2. Direct assignment to a senior CSM for personalized guidance. 3. Detailed reporting sent to premium customers, tracking all support interactions.
📣 **COMMUNICATION**	DAP (In-App Guidance)	• Pendo • WalkMe	1. In-app pop-ups offering premium training at key moments (e.g., when accessing complex features). 2. "Premium Training" badges displayed on advanced features to encourage upgrades. 3. Restricted access to certain features until a user completes a paid training module.

CATEGORY	TOOL	EXAMPLE COMPANIES	REAL-WORLD APPLICATIONS
📊 ANALYTICS	CRM	• Salesforce • Sellsy	1. Segmenting customers based on their use of premium services. 2. Predictive scoring for customers likely to purchase premium support. 3. Automated outreach to promote paid training to eligible customers.
📊 ANALYTICS	Product Analytics	• Mixpanel • Amplitude	1. Analyzing engagement rates with paid training. 2. Tracking the impact of premium training on product adoption. 3. Comparing churn rates between free-trained vs. premium-trained customers.
📊 ANALYTICS	CS Platform	• Skalin • Planhat	1. Customer satisfaction scoring for paid training participants. 2. Identifying companies needing additional paid support. 3. Alerts on high-potential accounts for upsell opportunities.

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6. Training & engaging partners (resellers, integrators, etc.)

> **GOAL**
>
> Build an autonomous and high-performing partner network to drive sales and deployments.

CATEGORY	TOOL	EXAMPLE COMPANIES	REAL-WORLD APPLICATIONS
🎓 **LEARNING**	Customer LMS	• MeltingSpot • Skilljar	1. Certification training to accredit partners with an official label. 2. Specialized modules based on partner roles (reseller, integrator, consultant). 3. Quizzes and exams to validate product knowledge before allowing resell rights.
🎓 **LEARNING**	Helpdesk	• GitBook • HelpScout	1. Dedicated partner documentation with technical guides and sales materials. 2. Knowledge base integrating use cases for indirect sales. 3. Partner FAQ accessible via a dedicated portal.
📣 **COMMUNICATION**	Ticketing System	• Zendesk • Intercom	1. Priority support for certified partners to resolve issues quickly. 2. Interaction history tracking partner progress in their learning curve. 3. Automated resource delivery based on partner support inquiries.
📣 **COMMUNICATION**	DAP (In-App Guidance)	• Pendo • WalkMe	1. Contextual reminders on best sales and implementation practices. 2. Interactive support for mastering key features. 3. Direct access to sales materials via tooltips.

CATEGORY	TOOL	EXAMPLE COMPANIES	REAL-WORLD APPLICATIONS
📊 ANALYTICS	CRM	• Salesforce • Sellsy	1. Tracking partner performance and sales impact. 2. Segmentation based on partner engagement and training completion. 3. Identifying high-potential partners for VIP support.
📊 ANALYTICS	Product Analytics	• Mixpanel • Amplitude	1. Comparing customer success rates between direct vs. partner-led implementations. 2. Tracking content consumption by partners to tailor training. 3. Identifying struggling partners to offer additional coaching.
📊 ANALYTICS	CS Platform	• Skalin • Planhat	1. Partner engagement score based on their usage of training and tools. 2. Alerts for inactive partners to trigger a sales follow-up. 3. Analysis of the success rate of projects deployed by each partner.

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Conclusion ▐ Build your ideal Stack!

In this guide, we explored **the essential solutions for structuring an effective Customer Success stack**, detailing **their strengths, limitations, and complementarity with MeltingSpot**. We also demonstrated how this stack evolves **based on company maturity** and adapts to **different strategic use cases**.

By adopting a **structured and scalable approach**, you can build a **stack that truly supports the growth of your SaaS**, maximizing **product adoption, retention, and CS team efficiency**.

Key Steps to building an effective stack

1. Define your objectives

Clarify your priority: accelerate onboarding, reinforce product adoption, automate Customer Success, optimize freemium activation, or monetize customer enablement?

2. Identify the Right Tools

DAPs, helpdesks, community platforms, LMS... each solution serves a specific need. Your stack should always include a learning tool, a communication tool, and a measurement tool.

3. Build a cohesive & scalable stack

Adapt your stack to your company size:
- Minimum Product Adoption Stack for startups and SMBs.
- Growth Product Adoption Stack for fast-growing scale-ups.
- Full Product Adoption Stack for large enterprises and mature SaaS companies.

4. Optimize the user experience

Adoption doesn't happen by itself—it needs to be enabled! Ensure training is contextual, interactive, and directly embedded in the product.

5. Track impact & continuously adjust

Measure the effectiveness of your stack with precise KPIs (engagement, feature adoption rate, customer health scoring) and refine your strategy accordingly.

Why MeltingSpot is a key asset in your stack

✓

Seamless integration in your software

Deliver training content at the right place, at the right time—exactly when users need it, helping them overcome product roadblocks.

✓

Contextual & engaging learning

Unlike external LMS platforms or DAPs limited to tooltips, MeltingSpot embeds learning directly into the user experience.

✓

A modular & complementary tool

MeltingSpot integrates with your CRM, analytics tools, and support platforms for a smooth and scalable adoption strategy.

✓

Measurable impact on product adoption

With the Customer Education Score, you can precisely track how learning influences product usage and retention.

✓

Time-saving for your CS teams

Fewer support tickets, more autonomous customers, and a scalable Customer Success model focused on high-value interactions.

Need help structuring your stack?

→ **TALK TO OUR EXPERTS**

64 %
of customers consider the customer experience more important than price when making a purchase.

Source : YELDA

Now it's your turn to build a high-performance, scalable stack!

Conclusion

Your stack is a strategic growth lever

Product adoption and Customer Success are **not just operational functions**, but **true growth drivers for a SaaS business**. A **well-structured and maturity-aligned stack** allows you to optimize user experience, increase retention, and scale customer enablement efficiently.

With MeltingSpot, you have a **powerful solution to structure** and **enhance your adoption strategy**, providing **contextual, interactive**, and **measurable learning**.

☎️ → TALK TO OUR EXPERTS

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