CUSTOM SAMPLE / PUBLIC-SOURCE DEMONSTRATION

Cognex: a conversation worth qualifying.

Seller: Instruct Clearly · Objective: qualify a customer-training conversation · Scope: corporate account, U.S.-focused outreach.

Research cutoff: September 17, 2026. Independently researched; not commissioned Cognex work, a client relationship, or an endorsement.

Executive read

Recommendation: qualify one narrow post-course task before proposing production. Do not pitch Cognex a new training program.

The strongest finding is also the strongest objection: Cognex already offers short self-guided learning, instructor-led courses and on-demand delivery. OneVision has both an Essentials introduction and a two-day Standard course with guided and final labs. A generic “make your training shorter” message would overlook the account's existing investment. [2][4][5][6]

There is nevertheless a specific conversation to test. Cognex's August 5 results release reports OneVision general availability and hundreds of customers using the platform; management also names customer experience and doubling its customer base as strategic objectives. These are corporate statements, not an instruction to any local team to buy outside training. [3] **Inference:** a useful question is whether customers can repeat one important workflow after formal instruction—not whether Cognex needs education about education.

Instruct Clearly's public offer is to capture real work with process experts and turn it into short, searchable video lessons, organized for onboarding, refreshers and everyday use. [1] That supports a potential production role around an approved workflow. It does **not** establish Cognex product expertise, certification, customer-training references or measurable business outcomes.

Decision today: retain Cognex as a research-qualified conversation candidate, not a qualified sales opportunity. Continue only if an accountable Cognex owner identifies a repeatable learner problem, shows why existing materials do not solve it, and can authorize technical review. Confidence is high in the existence of the public training infrastructure; low in any unmet need or willingness to outsource.

Account context that changes the approach

Growth is context, not a budget signal. Cognex reported $291 million of revenue for the quarter ended July 5, 2026, up 17% year over year. The same release reports operating expenses down 3% and describes efficient scaling as a management priority. [3] **Implication:** make the case for a bounded complement to existing assets, not a speculative content library. Neither revenue growth nor cost discipline proves available training spend.

OneVision is a workflow system, not just a feature list. Cognex describes guided labeling, training and validation; shared assets across teams and production sites; and central deployment with local execution and customization. [7] “Training” here can mean training an AI model. It must not be mistaken for evidence about human learning needs. **Implication:** any human lesson must specify who performs which action, in which product/version, under whose approval.

The learning ladder already exists. Essentials includes navigation, tenant management, user access, collaboration and projects. Standard progresses to application creation and implementing a toolchain in In-Sight Vision Suite using Spreadsheet. The course lists prerequisites and compatibility boundaries. [4][5] **Implication:** inspect the actual relevant lesson before calling anything a gap. This research reviewed public descriptions, not the authenticated course experience.

Entity boundary: these sources describe Cognex Corporation, its public products and global training offer. They establish no site-level initiative, regional backlog, named customer's difficulty, local budget or procurement route. Cognex's customers and channel partners are not interchangeable with Cognex as a potential buyer.

Four hypotheses—with reasons each may be wrong

1. Post-course workflow reinforcement — first hypothesis to test

Basis: two-day OneVision course teaches toolchain implementation in In-Sight Vision Suite and includes hands-on labs. Instruct Clearly offers searchable task walkthroughs. [5][1]

Hypothesis: a short, version-labeled refresher for one already-taught workflow could help an authorized learner repeat it later. An illustrative candidate is returning to an approved toolchain-to-Spreadsheet workflow; this is not a claim that customers struggle with it.

Counterevidence: the existing labs and Essentials-to-Standard pathway may already provide sufficient practice and reference material. [4][5] Public descriptions cannot establish a missing resource.

Test / stop: ask an education or support owner to identify one repeated question after training and show the current answer. Compare a proposed task aid with that answer. Stop if the answer is already effective, the task varies too much, or the cause is product behavior rather than instruction.

2. Find the right refresher, rather than produce another course

Basis: In-Sight Vision Suite Spreadsheet Standard already includes deployment and differences between In-Sight Explorer and In-Sight Vision Suite, with an on-demand option. Instruct Clearly explicitly includes library organization. [6][1]

Hypothesis: the useful work might be task naming, search entry points and links into existing approved resources—not new video. A learner's question could be “which software workflow applies here?” rather than “teach me machine vision.”

Counterevidence: the course already names those differences. [6] Its platform may make the answer easy to find; this research did not test that.

Test / stop: observe a representative learner finding a specific answer in the current library. If discovery is the problem, try a link or index correction first. Reject production if the smaller change solves it. A useful brief should sometimes reduce the seller's proposed scope.

3. Make one cross-team handoff teachable

Basis: OneVision's product page describes sharing reusable assets across teams/sites and central deployment with local customization. Essentials already covers collaboration and user-access concepts. [7][4]

Hypothesis: where a customer-approved operating procedure exists, a role-specific walkthrough might make the boundary between central model work and local authorized action clearer. Instruct Clearly could capture the procedure; Cognex and the relevant customer would need to supply technical and operational authority.

Counterevidence: built-in workflow design and existing instruction may already solve the issue. The actual obstacle might be permissions, governance or integration—not content. No specific cross-site failure was found.

Test / stop: ask which handoff, if any, creates repeated clarification. Establish whether Cognex or its customer owns that process. Stop if no common, approved procedure exists or if the proposal drifts into engineering, safety assurance or unauthorized changes to customer production.

4. Release-specific lesson maintenance — conditional, lower priority

Basis: the Standard course publishes camera/software compatibility constraints, while the seller offers focused process capture and library organization. [5][1]

Hypothesis: a small set of existing lessons might need recapture when an approved workflow changes. A narrowly bounded production assignment could be useful if Cognex supplies the change list, environment, subject-matter reviewer and publishing owner.

Counterevidence: compatibility information is evidence of scope control, not evidence of stale lessons or an internal production backlog. The public seller page does not establish release-management, localization or learning-platform integration capability.

Test / stop: request one actual update example and inspect its ownership and review process. Proceed only if the bottleneck is production that the seller can demonstrate it can perform. Stop if technical validation, missing documentation or product instability is the real constraint.

Public role map—not a buying committee

Public role	Verified scope	Conversation relevance / authority limit
Darren Long — Vice President, Customer Success	Leads global support and service organizations and the customer journey across products and regions. [10]	Most relevant executive remit for a support-to-learning question. No verified training budget, vendor-selection authority or personal interest. Seek the operating owner, not an assumed executive sale.
Carl Gerst — Executive Vice President, Global Sales & Products	Biography describes product development, management and marketing responsibilities. [8]	Potential product-context routing relevance. Not evidence that he owns customer education or approves a pilot.
Matt Moschner — President and Chief Executive Officer	Global engineering, products, sales and operations scope; source of corporate priorities. [9] [3]	Strategy context only. Do not use the CEO's stated priorities as a claim that he sponsors this work.
Customer education/training owner; relevant product SME; publishing owner — identities unverified	Operating roles proposed for discovery, not confirmed titles or reporting lines.	Needed to establish the current answer, technical accuracy, learner access and maintenance. Ask who actually performs these functions.

No personal email addresses, inferred reporting chains or fabricated procurement contacts are supplied. The first useful referral is to the person accountable for the selected learner task.

Conversation card

Purpose: determine whether one unmet, repeatable customer task exists. Not to secure agreement that microlearning is beneficial in general.

Suggested opening—not sent:

> “We reviewed your OneVision Essentials and Standard descriptions, including the existing labs. We're not assuming you need another course. Instruct Clearly captures approved workflows as short, searchable lessons. Is there a task customers still need help repeating after training—or do your current resources already cover that well?” [4][5][1]

Questions that change the decision

1. What is one recurring question after the relevant course, and how do you know it recurs? **Why:** distinguish an observed problem from a plausible story.
2. What resource answers it today, and where does the customer look first? **Why:** separate missing instruction from poor discovery or access.

3. Which learner, camera/software version and operating setting are in scope? **Why:** prevent a generic recording from being presented as universally applicable.
4. Who owns technical approval, learner access and future updates? **Why:** establish a viable maintenance path before producing content.
5. Is the constraint recording capacity, instructional clarity, product usability, permissions or something else? **Why:** disqualify problems that a training producer cannot solve.
6. What observable result would justify keeping a new aid, and what result would tell us to stop? **Why:** agree acceptance before discussing expansion.

Conditional next step: only after a real problem is confirmed, propose a scoped review of one existing resource and one approved task. Request permission before accessing any nonpublic materials. Return one of three recommendations: reuse unchanged, improve discovery, or build a narrowly defined aid. Do not request broad customer data or a full content library by default.

If production is warranted, define one learner audience, one workflow/version, one technical approver, a maintenance owner and a task-based acceptance check. Assess whether learners can find the aid and perform the approved task without extra prompting in a suitable test environment. Do not infer support savings or revenue impact from positive feedback. Any later impact claim needs a baseline, comparable observation and attention to alternative causes. This sample is not a quote or delivery commitment.

Reasons not to buy—and unknowns to resolve

Disqualify if existing instruction solves the problem; if a link/index fix suffices; if Cognex prefers and has capacity for internal production; if no owner can validate the workflow; or if the real problem is engineering, permissions, product defects or unsafe operating conditions. Cognex itself advertises self-service resources and a global expert network—another reason not to presume an external gap. [7]

Pause if recordings would expose customer images, intellectual property or credentials without an approved handling process; if the workflow is changing too quickly to maintain; or if the seller cannot demonstrate the required technical capture quality. These are proposed safeguards, not identified Cognex incidents.

Unknown: training effectiveness, question volumes, resource usage, existing suppliers, internal production capacity, accessibility/localization needs, learning-platform constraints, commercial terms, budget, procurement and willingness to outsource. Public pages cannot resolve them. No missing-demand claim is disguised as an opportunity score.

What this research adds beyond a company summary: it changes the opening from “you need shorter training” to “does one post-course task remain unresolved?”; identifies existing assets that could defeat the sale; distinguishes product-model training from human instruction; separates corporate strategy from local authority; and defines evidence that would justify either a small next step or no purchase.

Copy-ready CRM note

Account: Cognex Corporation. Seller: Instruct Clearly. Objective: qualify a narrow customer-training need. As of September 17, 2026.
Evidence: Cognex already has short self-guided learning and hands-on OneVision courses; management has stated customer-experience and customer-base growth priorities.
Hypothesis: one post-course task may need reinforcement. No unmet need, budget, outsourcing interest, or purchase intent has been established.
Ask: What question recurs after training? What answers it today? Who can validate the workflow?
Stop if existing resources or a small discovery/access fix solves it.
Next step only if warranted: scope one approved task with a named technical reviewer and maintenance owner.
Public-source demonstration, not client work. Sources: https://xobiz.com/vantage/sample#sources

Sources and research boundary

Official sources, retrieved September 17, 2026. Undated pages are marked as such; retrieval is not publication. Publisher claims are not independent proof of effectiveness. Course descriptions were reviewed; authenticated courses were not accessed.

1. Instruct Clearly Training Services — XOBiz
   XOBiz · Undated page. XOBiz / Instruct Clearly public service representation. Not independent proof of outcomes or Cognex-specific capability.

   https://xobiz.com/instruct

2. Training Listing Page
   Cognex Corporation · Undated page. Public global training catalog; no course quality, completion, enrollment capacity or site-level need established. Dynamic course totals are not used as claims.

   https://www.cognex.com/en/tools-and-resources/training-listing

3. Cognex Reports Second Quarter 2026 Results
   Cognex Corporation · 2026-08-05. Consolidated Cognex Corporation and corporate management statements. Strategy is not a local site mandate. Rounded financial values are taken directly from issuer release; adoption and strategy are attributed, not independently verified.

   https://s2.q4cdn.com/773500753/files/doc_earnings/2026/q2/earnings-result/cognex-press-release-q2-26.pdf

4. Cognex Essentials: OneVision
Cognex Corporation · Undated page. Published course description and objectives, not observation of learner experience or instructional effectiveness.

https://www.cognex.com/en/tools-and-resources/training-listing/cognex-essentials-onevision

5. OneVision training | Cognex
Cognex Corporation · Undated page. Published course syllabus, audience, prerequisites and compatibility. No access to gated lessons, proof of unmet need or current seat availability.

https://www.cognex.com/en/tools-and-resources/training-listing/onevision-standard

6. In-Sight Vision Suite Spreadsheet Standard - Training | Cognex
Cognex Corporation · Undated page. Published training scope and delivery choices; no established migration problem, course completion or learner outcomes.

https://www.cognex.com/en/tools-and-resources/training-listing/in-sight-vision-suite-spreadsheet-standard

7. OneVision AI Vision Development Environment | Cognex
Cognex Corporation · Undated page. Publisher product/support representations. Marketing performance figures and customer testimonials are not adopted as verified outcomes or generalized to human training.

https://www.cognex.com/en/products/machine-vision-software/one-vision

8. Carl Gerst | Cognex
Cognex Corporation · Undated page. Public title and biography only; no training ownership, reporting chain, buying authority or interest inferred.

https://www.cognex.com/en/company/about-cognex/leadership/carl-gerst

9. Matt Moschner | Cognex
Cognex Corporation · Undated page. Corporate leadership scope, not identified sponsorship or an implied contact recommendation.

https://www.cognex.com/en/company/about-cognex/leadership/matt-moschner

10. Darren Long | Cognex
Cognex Corporation · Undated page. Role and functional remit only; no budget ownership, personal interest or vendor-selection authority established.

https://www.cognex.com/en/company/about-cognex/leadership/darren-long