Types of Customer Education

63% of companies now invest in customer education (Intellum, 2026)

Education programs can lift targeted product adoption by 38% (Forrester)

Definition: educational activities that guide customers, partners, and prospects toward their goals

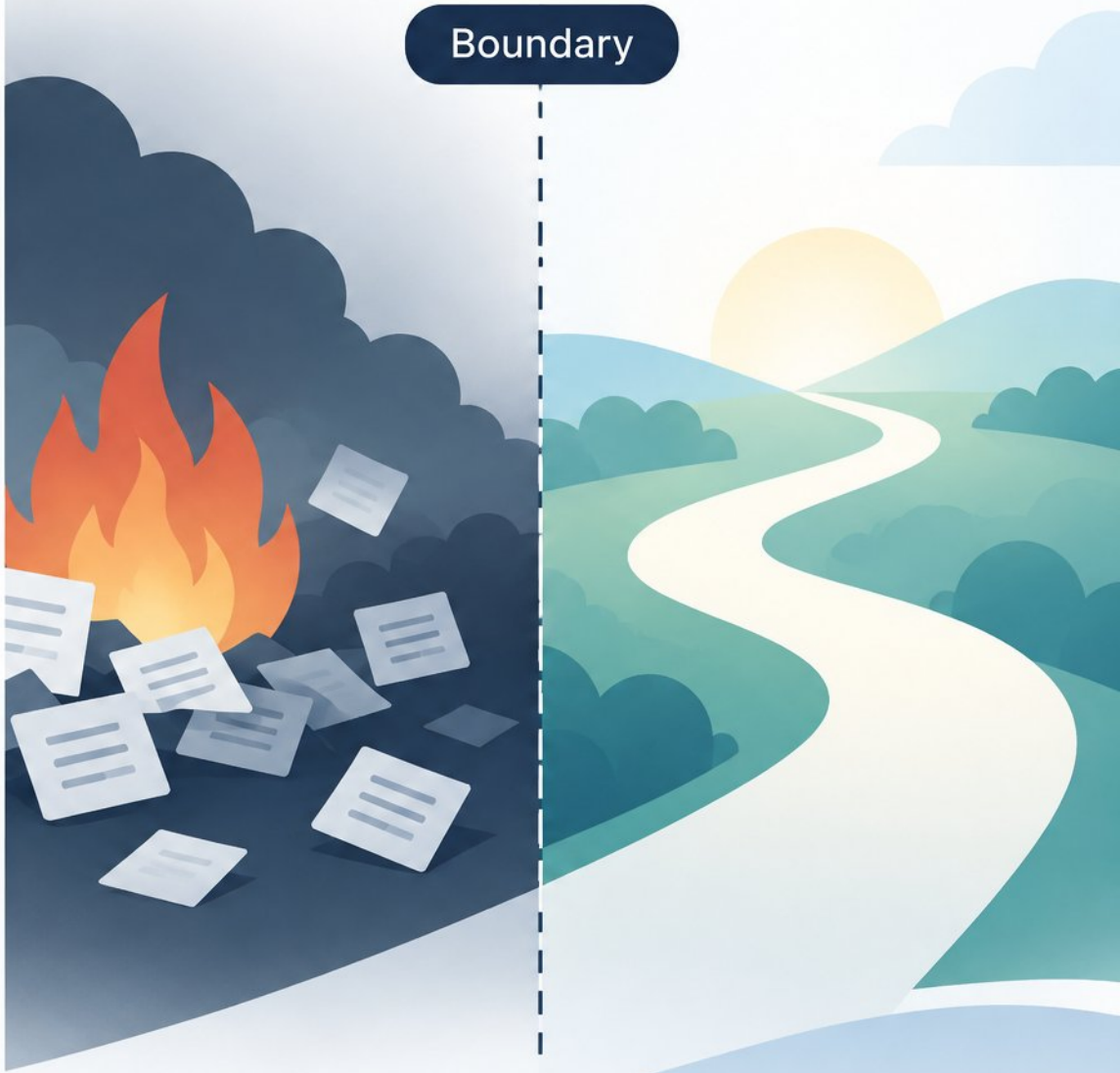
A lifecycle-wide framework: videos, articles, onboarding, workshops, certifications, help centers, community

Today: shared taxonomy, selection framework, and measurement you can apply next week

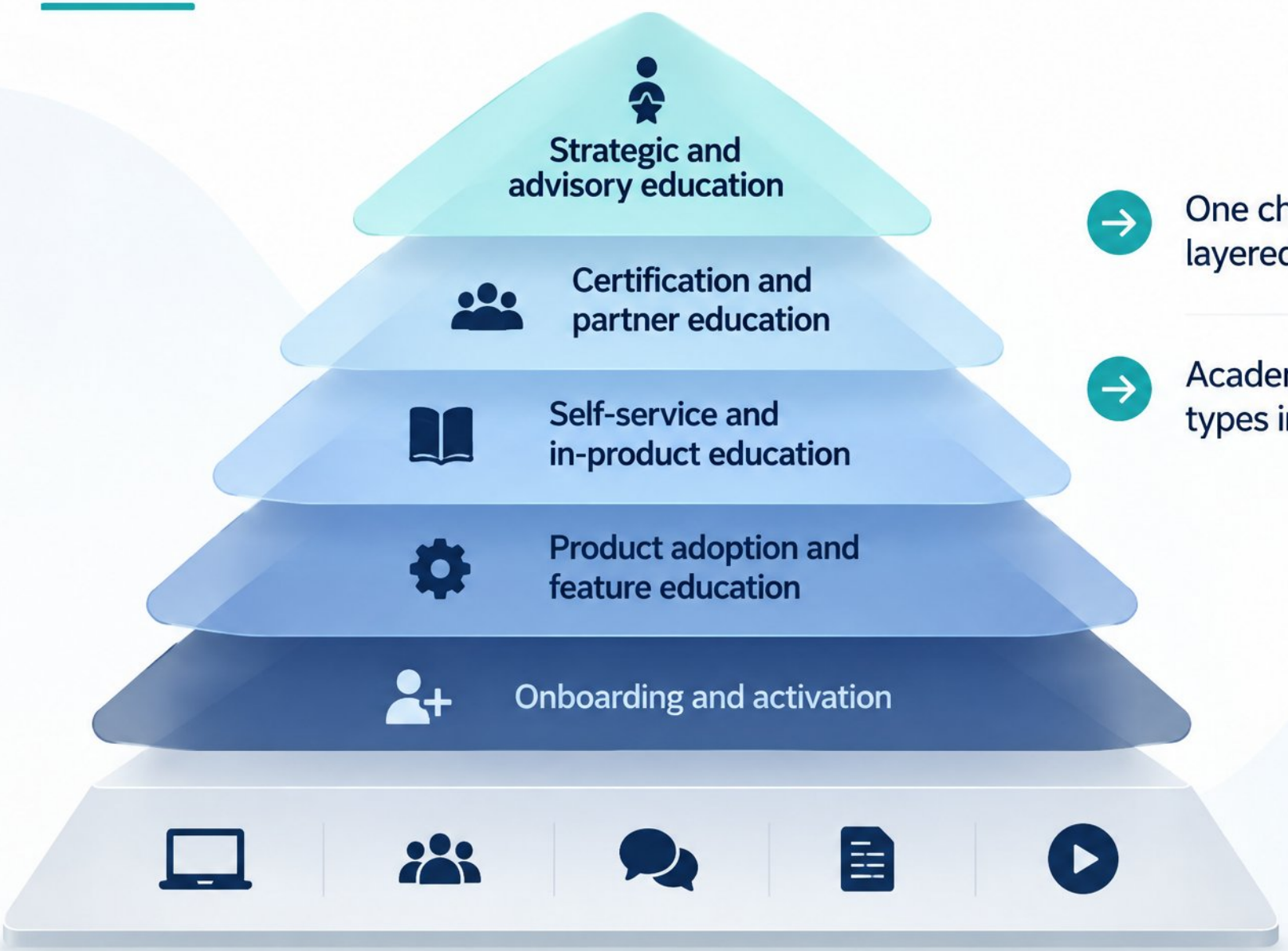


Definitions and Boundary Lines

- Support reacts to tickets; education prevents incidents proactively
- Marketing convinces prospects to buy; education helps buyers use, expand, advocate
- Enablement is the broader motion; education is the content-led subset
- Training teaches a skill to standard; education builds judgment-based competency
- Scope drift is normal — a written definition keeps scope aligned



A Practical Taxonomy of Education Types



- One channel stack, layered over time
- Academy sequences types into learning paths

Onboarding and Activation Education



Design: role-based paths, one activation milestone, quick wins, low first-login friction

Formats: guided setup, live kickoffs, in-app checklists, setup toolkits — keep core onboarding short

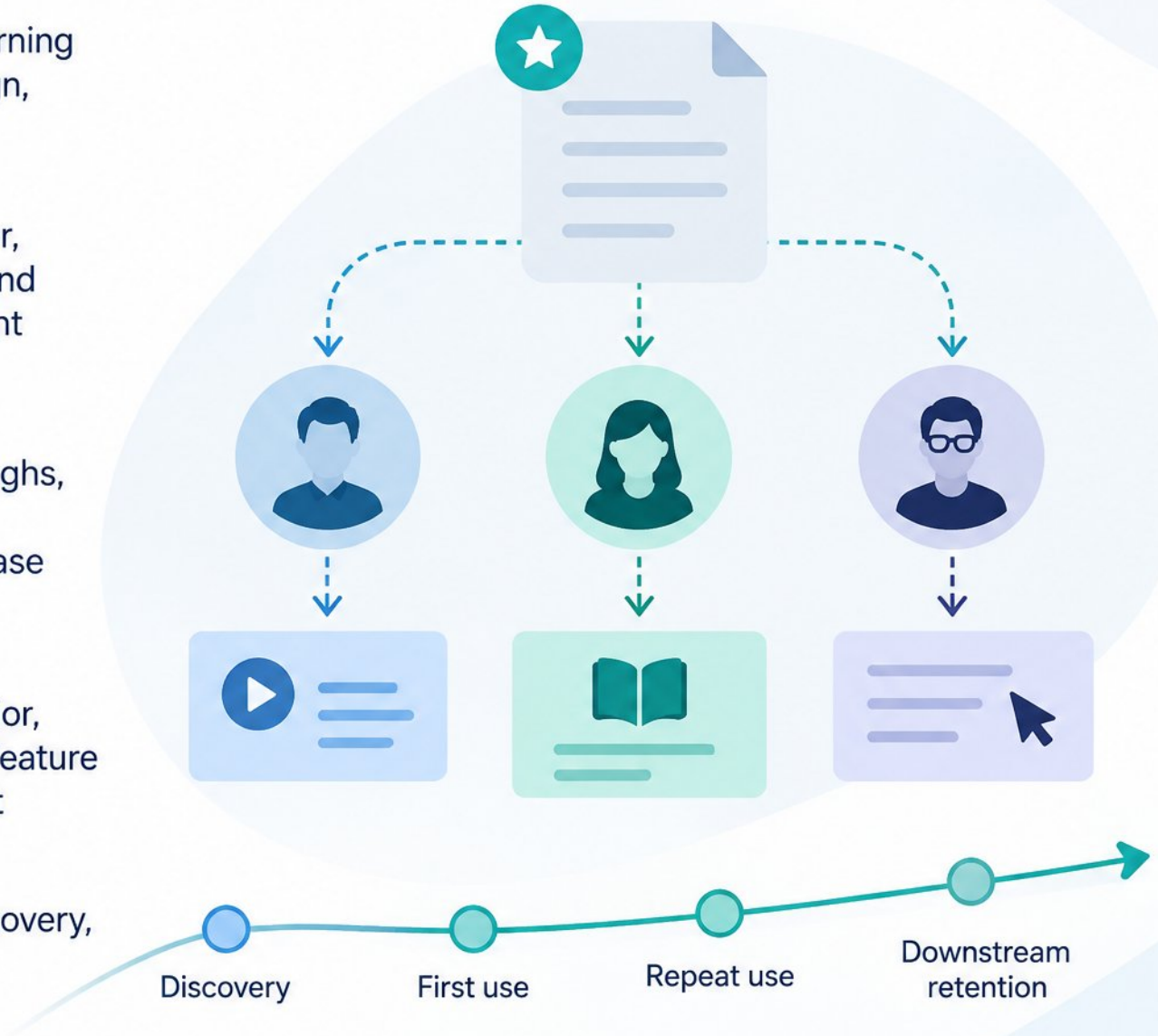
Metrics: activation rate, median time to value, step completion, early retention, ticket volume

Diagnose by step: early drops = relevance; late drops = sequencing; sharp single-step drops = friction

Coordinate implementation, education, and CS clear handoffs — and one owned definition of "adopted"

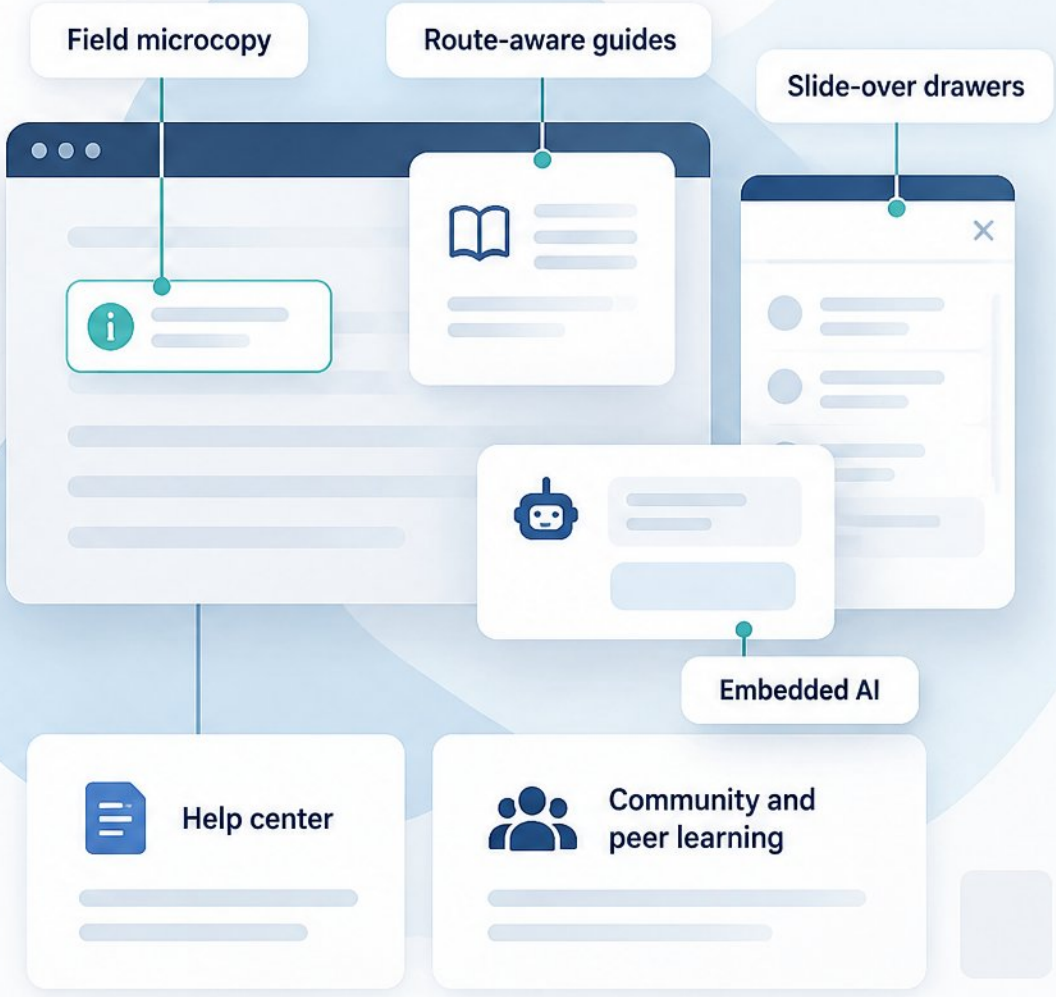
Product Adoption and Feature Education

- Treat release notes as learning content; plan the campaign, not just the ship date
- Segment by role, behavior, and maturity — admins and power users need different guidance
- Use interactive walkthroughs, tooltips at friction points, microlearning, and use-case academies
- Trigger training on behavior, not calendars — demo a feature when a user hasn't tried it
- Measure the journey: discovery, first use, repeat use, and downstream retention



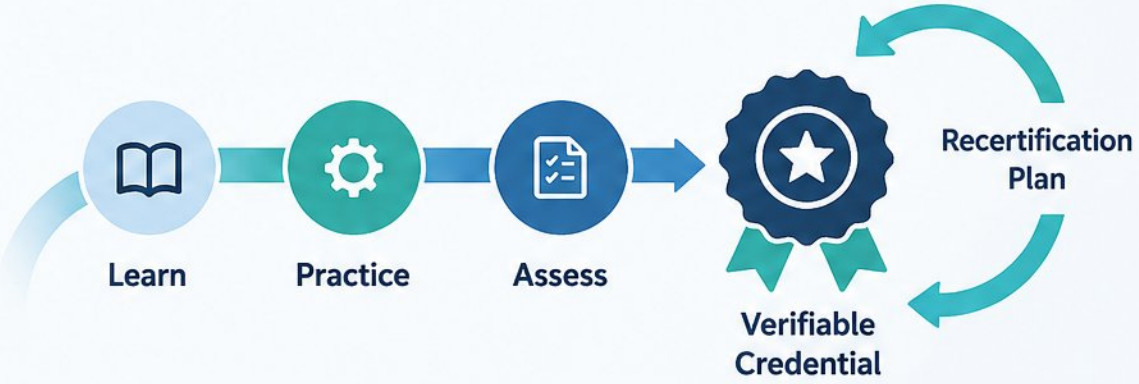
Self-Service and In-Product Education

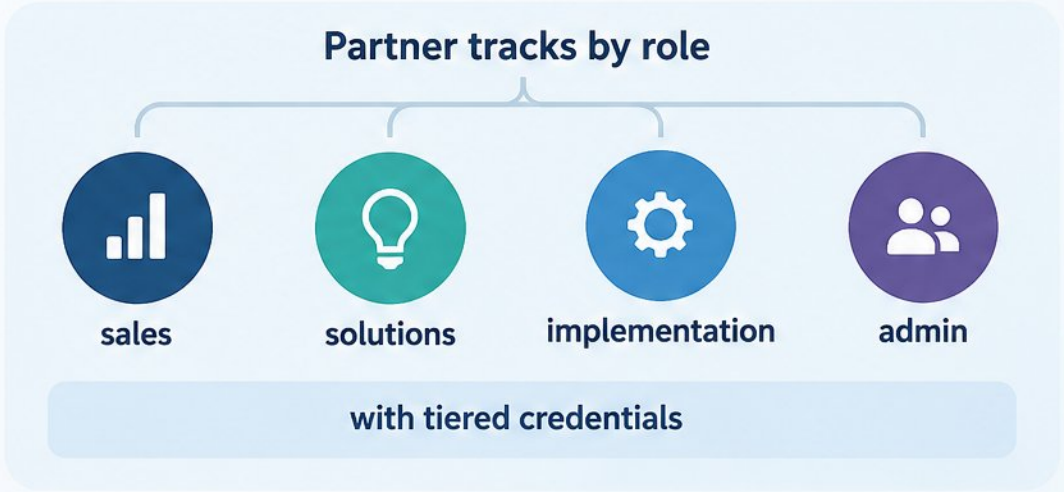
- Help center: prioritize high-ticket topics, optimize search, maintain on a cadence
- Four in-product modes: field microcopy, route-aware guides, slide-over drawers, embedded AI
- Ground AI answers in approved docs; cite sources and escalate when confidence is low
- Community and peer learning: forums and user groups reduce support load
- Only ~14% of issues fully resolve via self-service — measure resolution and deflection honestly

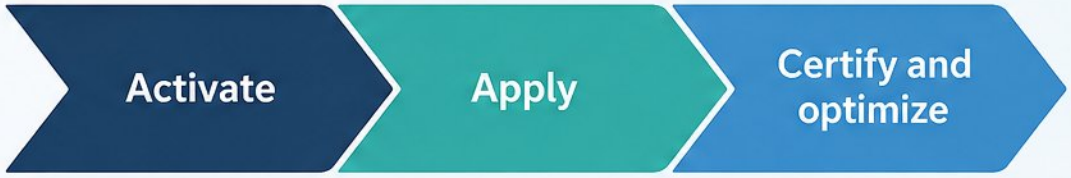


Certification and Partner Education

- Certification = sequenced path + assessment + verifiable credential + recertification plan
- Assess applied capability with scenario tasks and hands-on labs, not recall-only quizzes
- Partner tracks by role: sales, solutions, implementation, admin — with tiered credentials
- 30/60/90 path: activate, apply, certify and optimize
- Credentialing discipline: job-task analysis, item banks, cut scores, exam security, renewal
- Champions programs turn certified experts into peer teachers; track readiness and advocacy







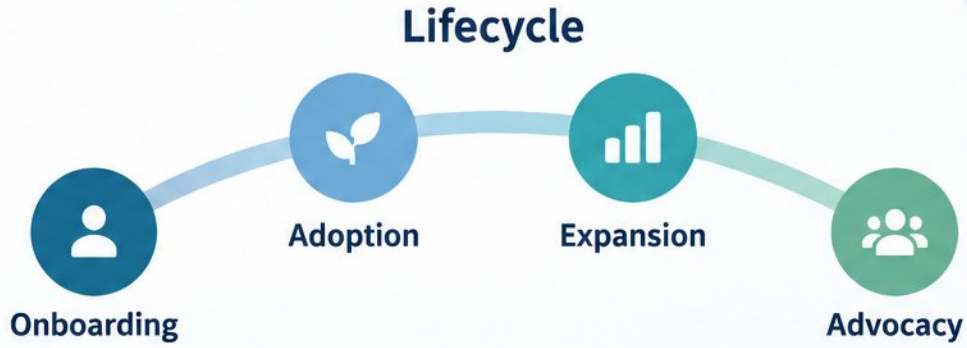
Strategic and Advisory Education

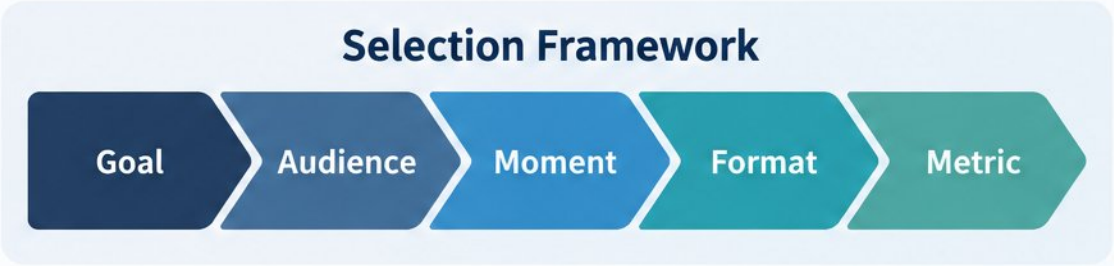
- Teach best practices, industry, and domain expertise — not just UI mechanics
- Executive tracks: business outcomes, reporting, governance, and adoption dashboards
- Advisory formats: optimization workshops, industry playbooks, cohort programs, case studies
- Broader use cases deepen perceived value, expansion, and retention
- Leading teams unify customer and partner education in strategic planning



Choosing the Right Mix by Audience and Lifecycle

- Match **type** to **segment**, role, complexity, and lifecycle stage
- Self-paced for repeatable onboarding and global access
- Live for complex implementation, discussion, and change management
- **Playbooks** for just-in-time reference; courses plus assessments for certification
- Selection framework: goal → audience → moment → format → metric
- Repeated á live session three times? Convert it to a reusable asset
- Prioritize by business goal, reach, cost, time to value, and reuse
- Balance high-touch and low-touch deliberately









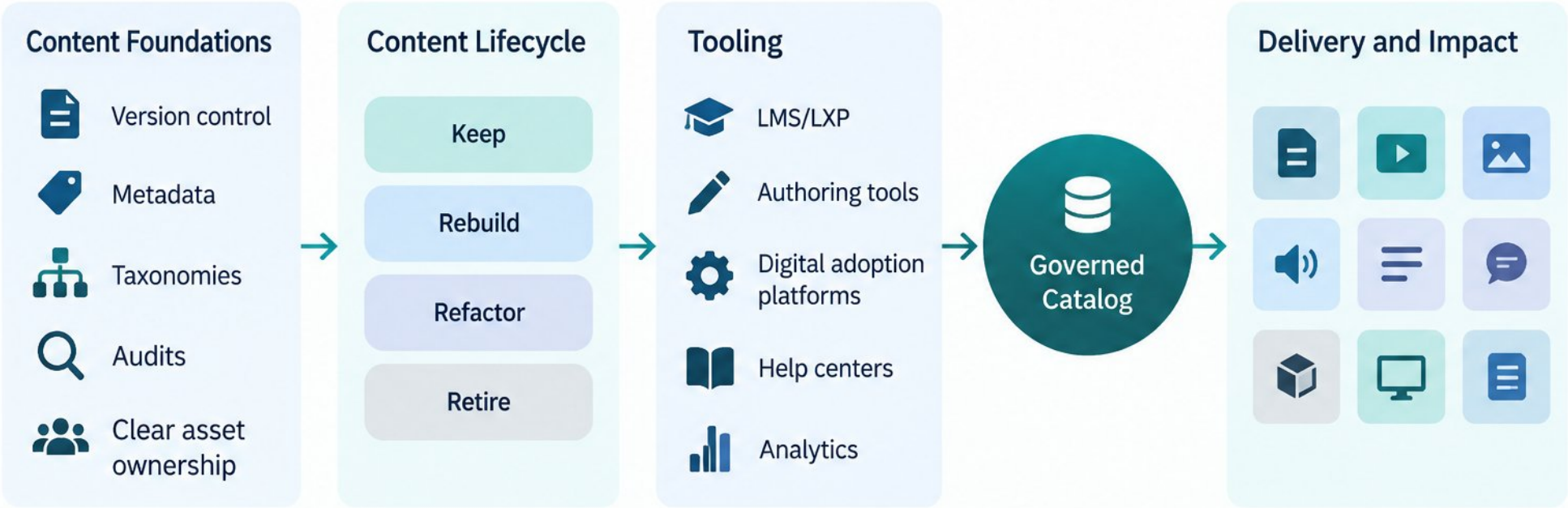
Balance high-touch and low-touch deliberately

Course Creation and Instructional Design



1. Start from learning objectives; align assessments to target behaviors, not existing content
2. Train by job to be done, not feature lists; use progressive disclosure
3. Production models: in-house ID, SME-led authoring, co-created, licensed content
4. Keep content modular and workflow-based; plan localization and captions from day one
5. Accessibility as process: WCAG 2.2 AA policy, author training, publishing gate, annual re-audit

Content Operations, Tooling, and Governance



- Version control, metadata, taxonomies, audits, and clear asset ownership
- Apply keep / rebuild / refactor / retire before adding new formats
- Tooling: LMS/LXP, authoring tools, digital adoption platforms, help centers, analytics
- Localize captions and alt text with audio; test text expansion and quiz logic
- Close the loop between regional delivery teams and global content strategy

Measuring Effectiveness Without Overclaiming

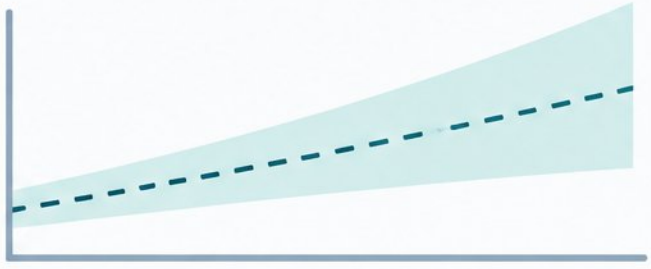
1. **Choose metrics by decision:** reach, task capability, transfer, or financial return
2. **Layer measurement:** engagement and completion → behavior change → retention and expansion
3. **Attribution is imperfect:** compare trained vs. untrained cohorts, match pre-training characteristics
4. **Translate metrics into leadership language:** NRR, GRR, LTV, CAC payback
5. **Sober ROI:** include all costs; run low, central, and high scenarios

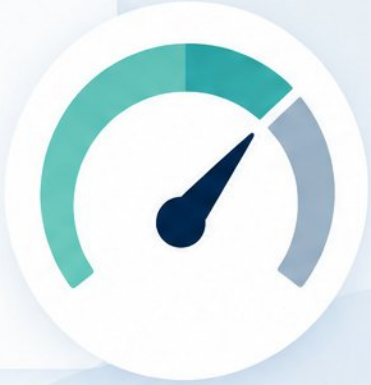


Leadership language

NRR | GRR | LTV | CAC payback

Sober ROI





Common Pitfalls and How to Avoid Them



- **Content sprawl:** without governance, courses, tours, and articles drift from the product



- **Over-indexing on completion rates:** weak evidence that churn or adoption changed



- **The transfer gap:** knowledge delivered in a Zoom room dies when applied later in-product



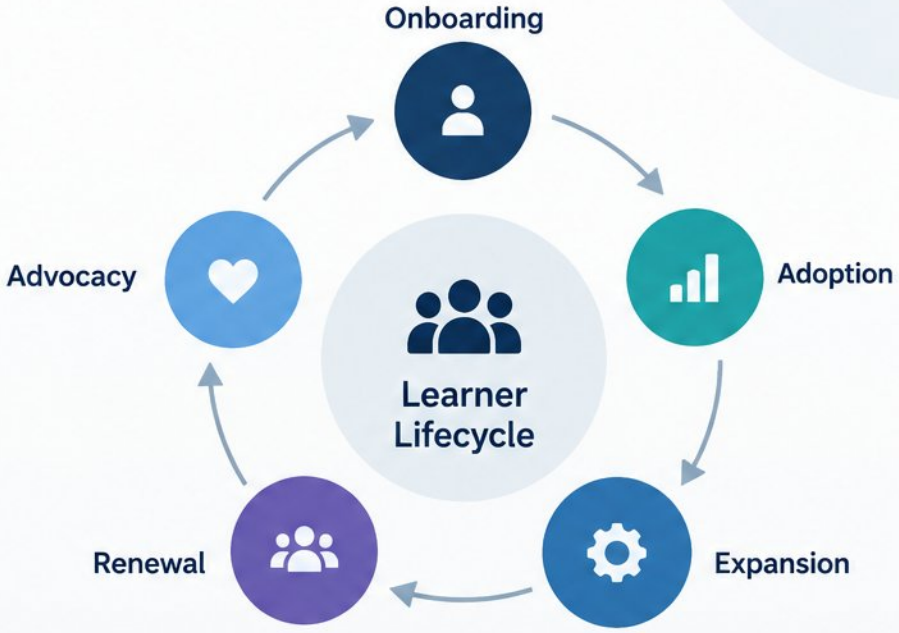
- **Poor handoffs** across success, support, product, and marketing create siloed learning paths



- **Maturity traps:** ad-hoc or live-only delivery, premature certification, measuring activity not impact

Action Plan: Auditing and Expanding Your Portfolio

1. Audit today's programs against the five types, segments, and lifecycle
2. Assign each program a keep, rebuild, refactor, or retire verdict
3. Locate your stage — Build, Operationalize, Transform — and pick one transition
4. Sequence quick wins: onboarding path first, then role paths, certification, community
5. Build a phased 90-day roadmap spanning format, production, tooling, measurement
6. Name owners, review cadence, and shared metrics with CS, support, product, marketing



From Audit to Impact: 90-Day Roadmap



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