

Customer Education Checklist: A Step-by-Step Review



A repeatable review process, not a one-time audit



Seven domains: strategy, audience, content, delivery, measurement, governance, improvement



Use it as a diagnostic, planning tool, and quarterly review instrument



Built for education, enablement, success, and content teams



2026: 51% call themselves mature; only 19% truly are



Why a Structured Review Matters



Unreviewed programmes show content debt, stale screenshots, low completion, unclear ownership



Self-paced libraries plateau in the low double digits after onboarding push ends



Every product release breaks at least one screenshot, workflow, or module



Stale content generates support load instead of deflecting it

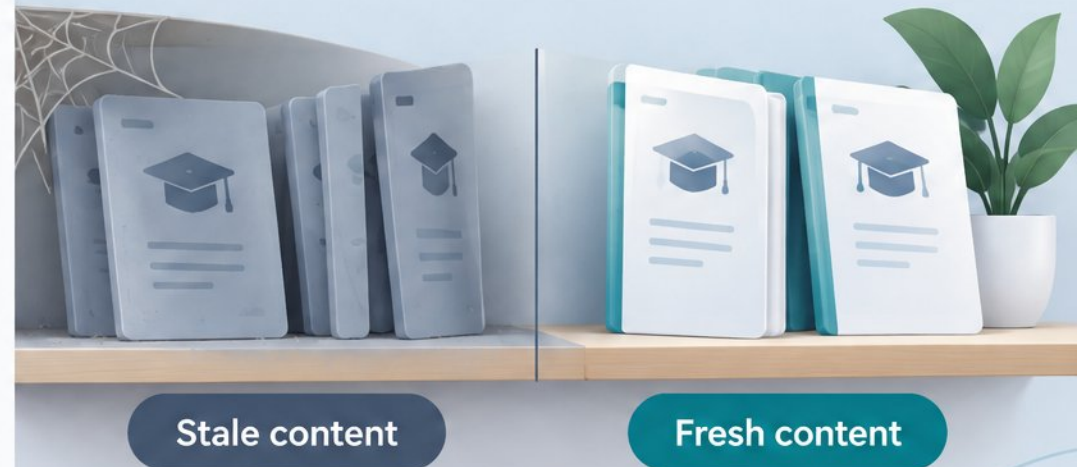
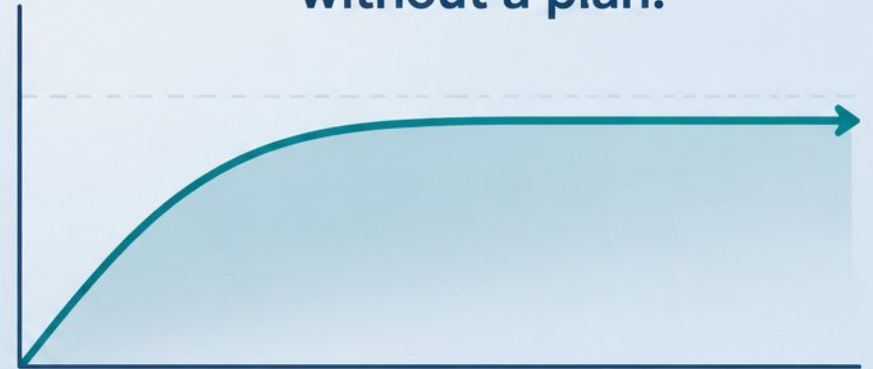


44% now seen as strategic growth levers; 78% get quarterly leadership review



Yet a third still have no executive sponsor

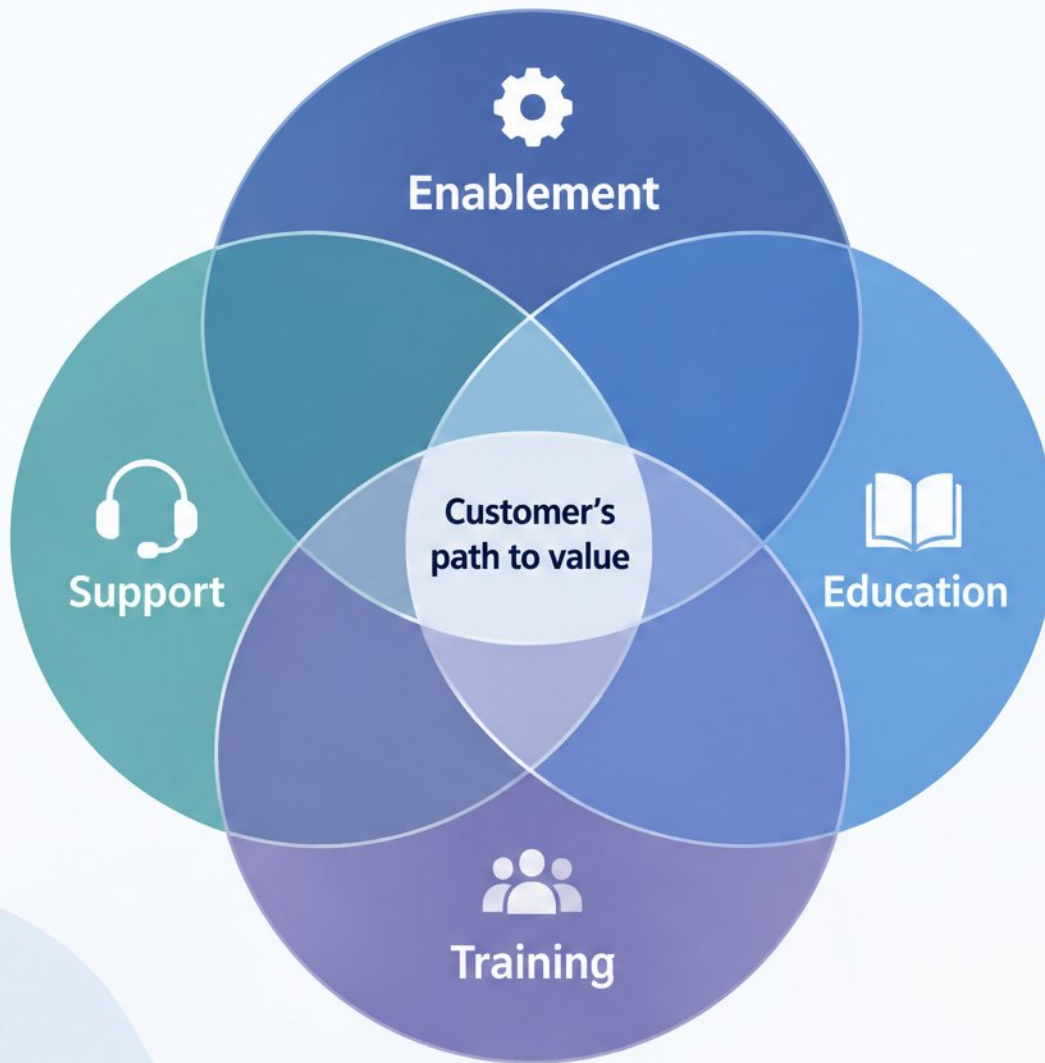
Momentum fades without a plan.



Stale content

Fresh content

Definitions: Education, Enablement, Training, and Support



Enablement: the umbrella—everything that equips customers to succeed after purchase



Education: the structured, programmatic subset that delivers learning content



Training: the delivery side—courses and sessions customers actually take



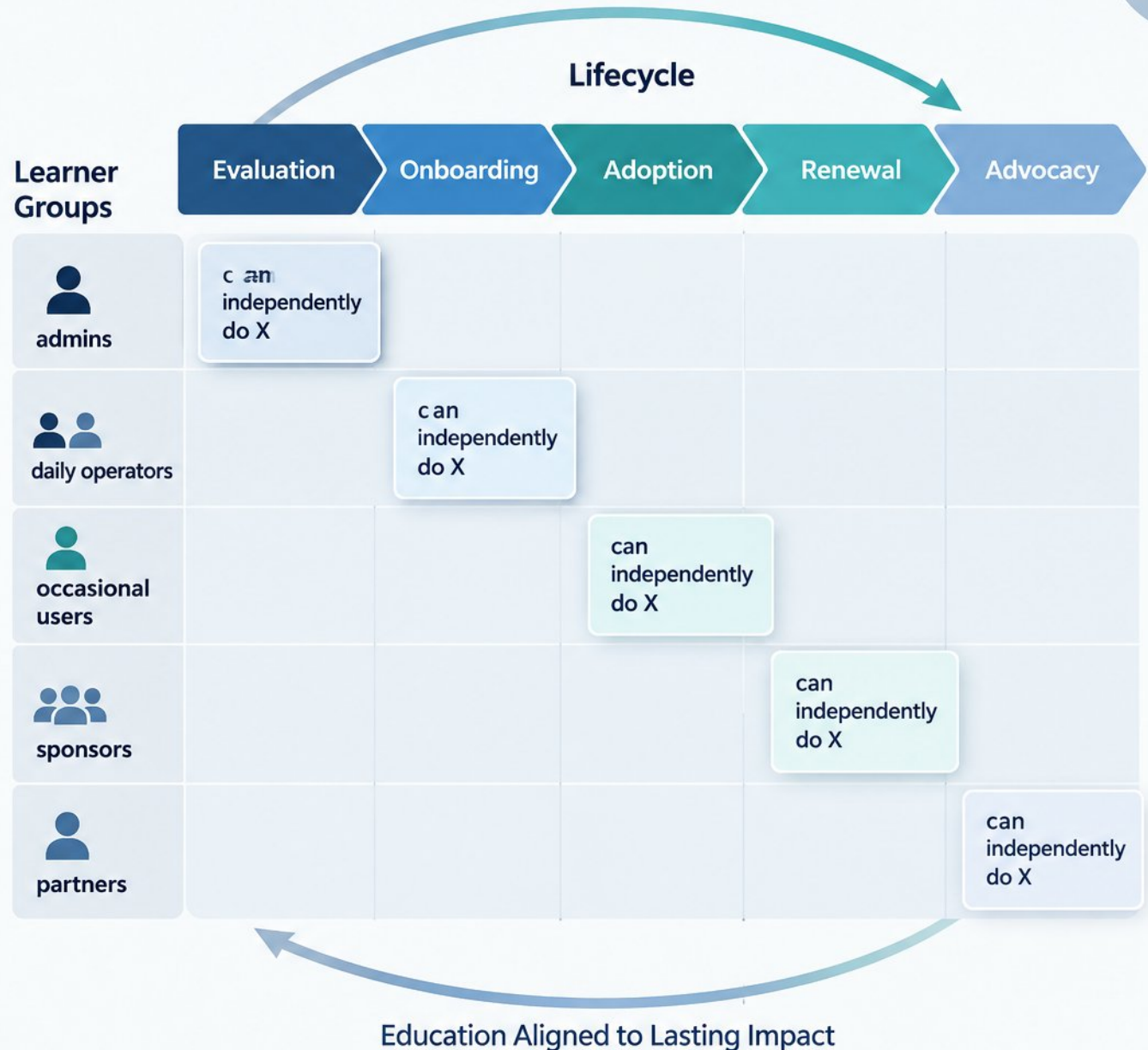
Support is reactive; success manages relationships; education sits proactive between them



Small teams run enablement and education under one person; larger orgs split them

Start With Scope, Audience, and Programme Goals

- 1 Define scope first:**
segments, products,
lifecycle stages covered
today
- 2 Identify learner groups:**
admins, daily operators,
occasional users,
sponsors, partners
- 3 Map education to
lifecycle:**
evaluation, onboarding,
adoption, renewal,
advocacy
- 4 Translate business goals:**
time-to-value, adoption,
lower tickets, retention
- 5 Write five to eight
competencies per role:**
“can independently do X”



Review the Goal-to-Metric Link Before Content

1

Pick one or two target metrics before auditing any assets

2

Name retention, time to first value, ticket deflection, or expansion

3

Use SMART objectives or OKRs; name a business owner per target

4

Baseline first: without pre-programme data, nothing is provable

5

Stakeholders differ: CS wants retention, product wants activation

6

Reality check: 57% name retention, yet 42% spend on onboarding

From Goals to Metrics



Retention



Time to first value

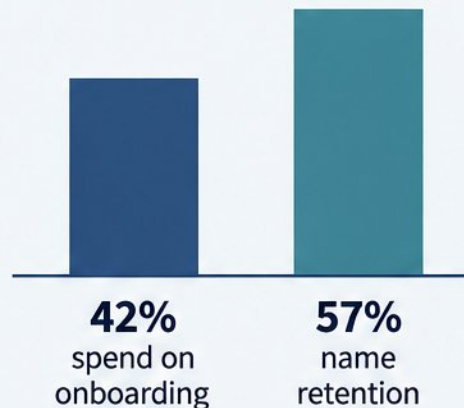


Ticket deflection



Expansion

Spend vs. Objective



Align spend with the metrics that matter.

Content Inventory: Build the Single Source of Truth



Gather every asset first: courses, guides, videos, webinars, decks, wiki pages, old LMS modules



Tag each asset by audience, product area, lifecycle stage, format, owner, last reviewed date



Visibility comes before organisation: don't aim for a perfect structure on the first pass



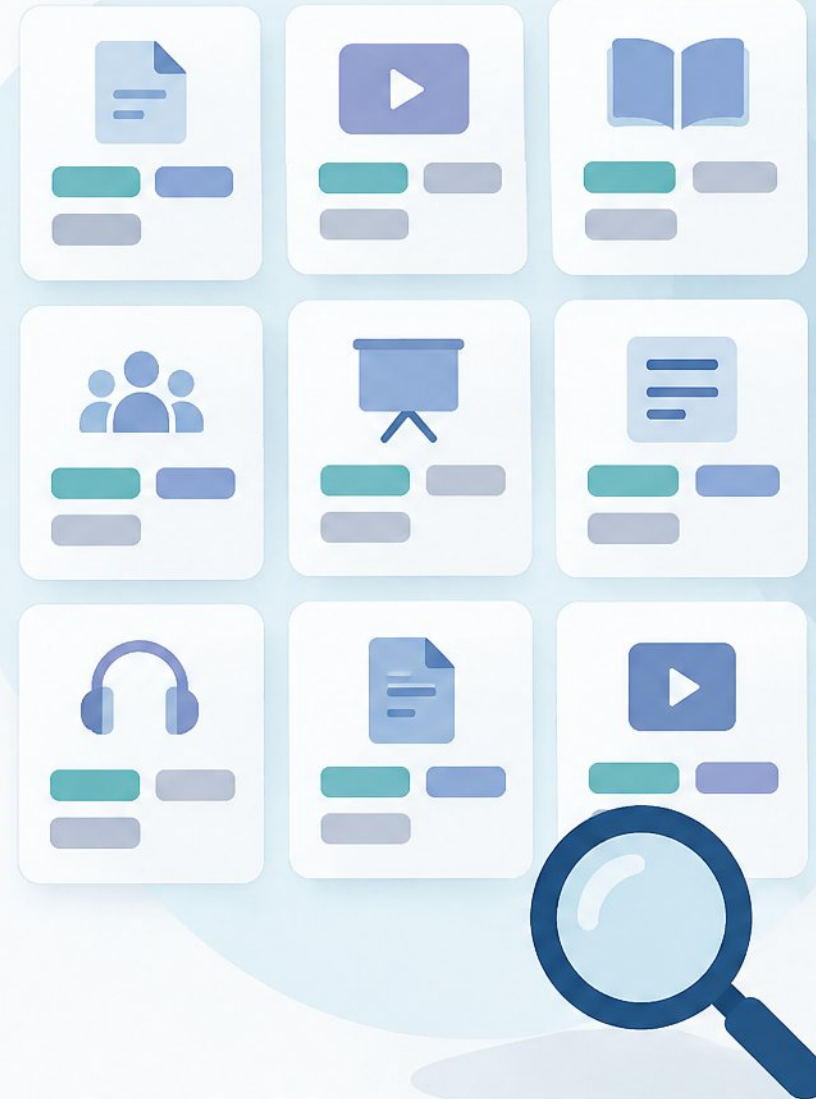
The first-value onboarding path matters more than catalogue size



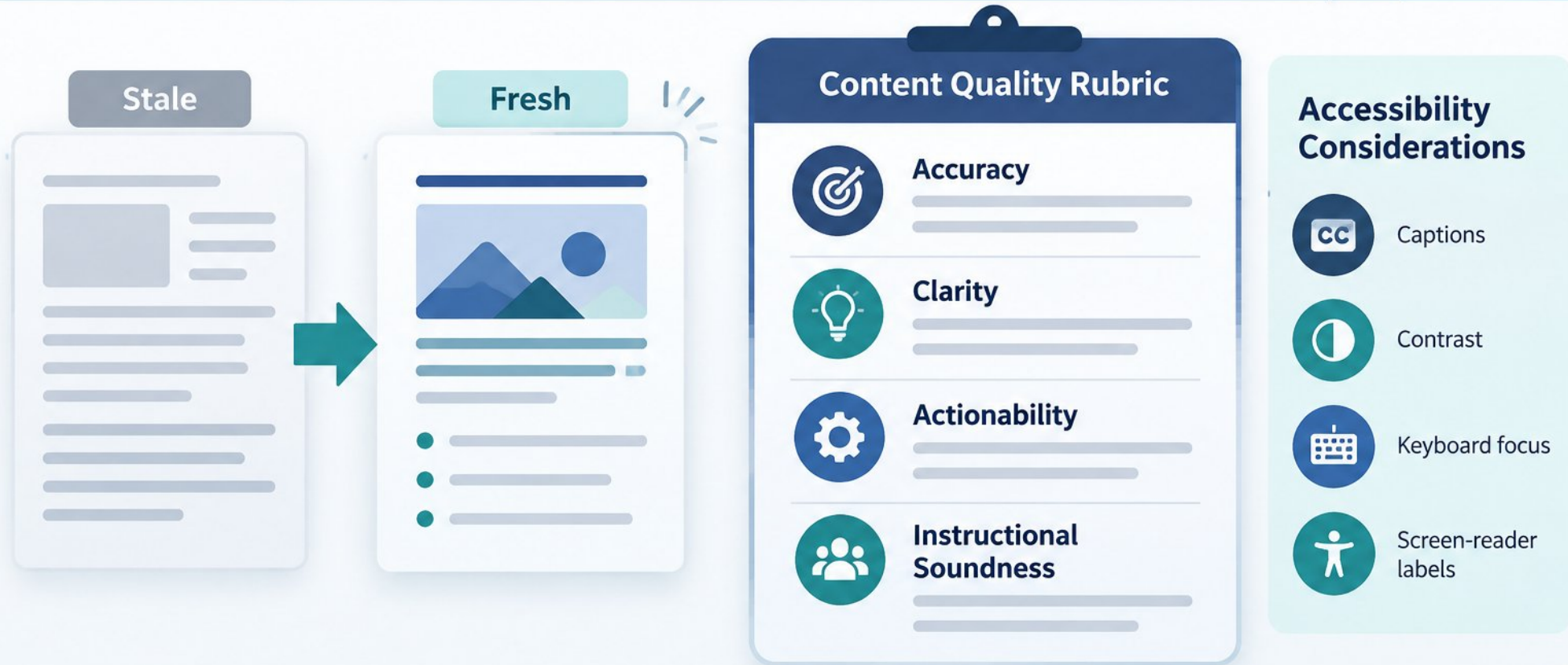
Flag duplication: support, docs, and education often keep three versions of one answer



Reality check: 21% of programmes lack defined success measures; 31% lack analytics



Content Quality: Score Accuracy, Clarity, and Instructional Soundness



- Score every asset: clarity, specificity, actionability, and modality alignment
- Check objectives: specific, measurable, observable learner behavior
- Cover WCAG basics: captions, contrast, keyboard focus, screen-reader labels
- Proofread line by line, not just spell-check; keep terminology consistent
- Run QA at storyboard, alpha, beta, and pre-launch — not one final checkpoint

Sort Assets: Keep, Patch, Convert, or Retire



Bucket every asset: keep, patch, convert, or retire



Run a visual drift check on your top ten most-viewed assets



Confirm navigation, icons, and critical paths still match the product



Use analytics and tickets as stale-content signals: completion drops, quiz spikes



Prioritize top 20% most-viewed lessons; they carry the most trust



Track retirement explicitly so removed content never resurfaces



Delivery Channels and the Learner Experience

- Map access points: LMS, help center, in-product guidance, community, live sessions, CSM talks
- Each channel has a narrow strength; none does everything well
- In-app guidance wins at the moment of need; docs win on search and depth
- Courses and certifications win on role mastery; webinars surface questions but don't scale
- Trigger learning per seat, not per account, so every new user gets the same start



SAME START.
BRIGHTER PROGRESS.

Accessibility, Localization, and the Busy-Professional Learner

CLEARER
LEARNING
BRIGHTER
POSSIBILITIES

- ✓ Treat accessibility as part of delivery: captions, contrast, keyboard focus states, mobile
- ✓ Verify localization coverage; confirm translations get human review, not machine-only output
- ✓ Keep each asset to one idea: a two-minute video beats a forty-minute course
- ✓ Break courses into 90-second learning spotlights: one goal, one workflow, one response
- ✓ Atomic design is a maintenance strategy: update one spotlight, not the whole curriculum

A 90-second learning spotlight



Accessibility

Captions, contrast, keyboard focus states, mobile



Localization

Translations get human review, not machine-only output



Measurement: Climb the Ladder From Activity to Business Outcome



Five rungs: activity, learning performance, product behavior, customer health, business outcome



Track at least one metric from engagement, behavior, and impact tiers



Report the impact tier to leadership; views and logins do not defend a budget



Compare educated vs. non-educated cohorts: retention, adoption depth, tickets, expansion



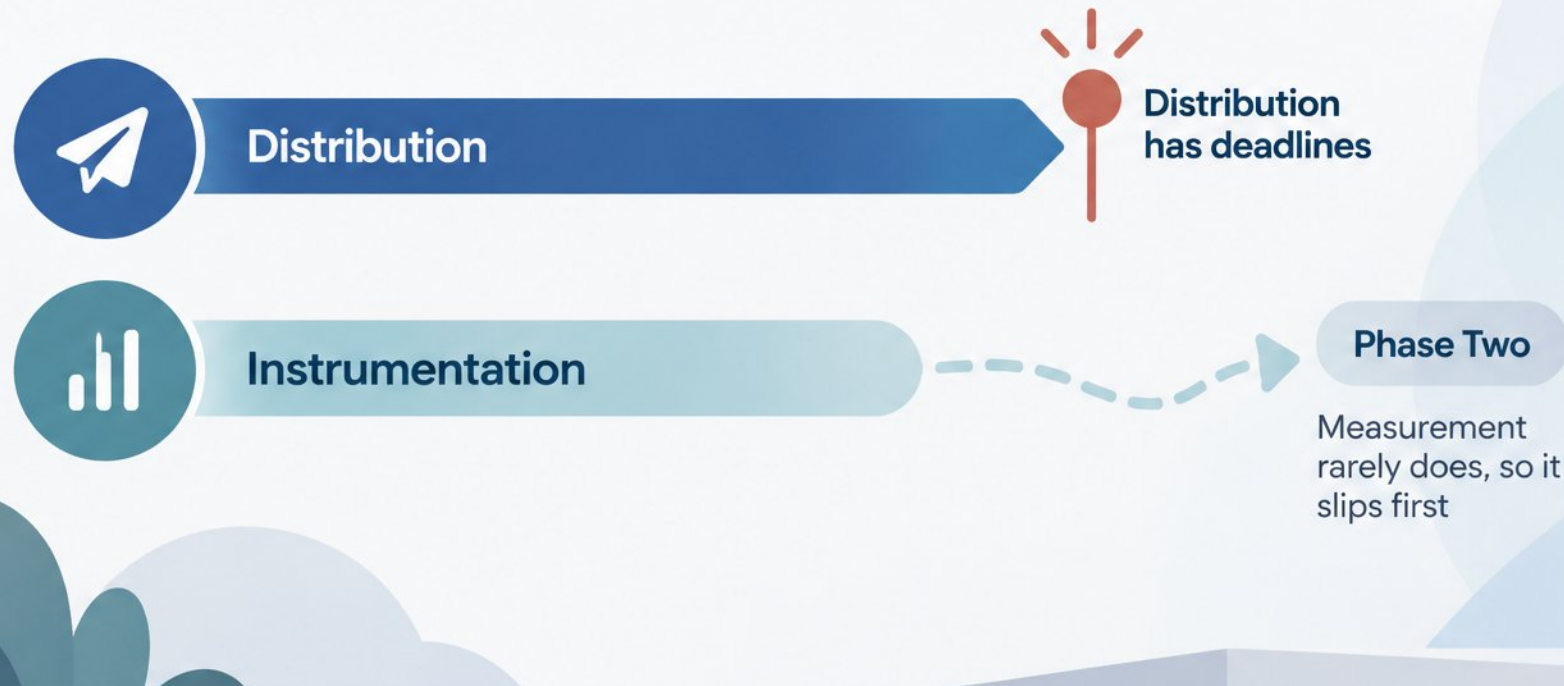
Segment deflection by role and lifecycle stage; averages hide what improved



Forrester: 38.3% faster adoption, 26.2% higher CSAT, 15.5% lower support costs

Instrument Before You Distribute

- Most common failure: shipping content before the measurement layer
- Distribution has deadlines; measurement rarely does, so it slips first
- Pull metrics design forward to ship alongside the content
- A programme is done when you can report what it did
- 20% report disconnected systems; 42% cite LMS-to-CRM barriers



Operations, Ownership, and Governance

- ✓ Named owner with budget, roadmap, and cross-functional ties
- ✓ No owner means education defaults to nobody
- ✓ Three-tier maintenance triggers: scheduled, release-based, data-driven
- ✓ Core onboarding audited quarterly; secondary modules semi-annual or annual
- ✓ Lightweight RACI: content owner, SME, auditor, programme owner
- ✓ Intake and prioritization stop loudest-voice requests
- ✓ Document governance so programmes survive reorganizations

Three-Tier Maintenance Triggers



Scheduled



Release-based



Data-driven

Lightweight RACI



Content
owner



SME



Auditor



Programme
owner



Run the Review: A Step-by-Step Workshop



Pre-work: inventory, metric baseline, stakeholder input ready before the session



Facilitate in checklist order: scope, content quality, delivery, measurement, governance



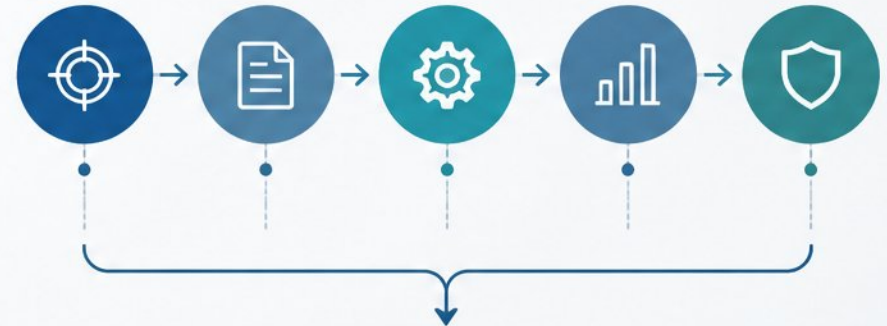
Score each domain for transparent, comparable, defensible decisions



Two reads: programme maturity and cross-team communication bridges



Output: prioritized action plan with owners, timelines, success criteria



Common Pitfalls, Small-Team Adaptations, and Next Steps

Common Pitfalls



Guard against: one-time audits, volume over value, vanity metrics, stale content.



Content unconnected to business goals cannot be defended to leadership.

Small-Team Adaptations



Under 100 customers: strong docs, top-20 FAQ, a few short how-to videos.

Cadence



Weekly pulse



Monthly freshness



Quarterly metrics



Annual strategy

Next steps



Schedule review



Assign owners



Baseline two outcome metrics.

PersonWise.

PersonWise • AI digital-human course platform



Scan the code or click anywhere to watch this course live, with voice Q&A

personwise.ai/t/7b83cb12/public