

How to Build a Customer Education Program: A Practical Workflow



- Step-by-step workflow to plan, build, launch, and improve



- Designed for customer education leads and customer success teams



- Focused on creating structured, outcome-driven learning paths



- Walk away with an actionable framework for your own product



Why Customer Education Matters for Retention and Growth



- Educated customers adopt faster and renew more predictably



- Reduces support load and lowers cost-to-serve



- 7.6% average revenue lift and 38.3% adoption increase for trained products



- 15.5% lower support costs and 90–96% report positive ROI



Revenue Lift

7.6% average revenue lift



Adoption Increase

38.3% adoption increase for trained products



Lower Support Costs

15.5% lower support costs



Positive ROI

90–96% report positive ROI

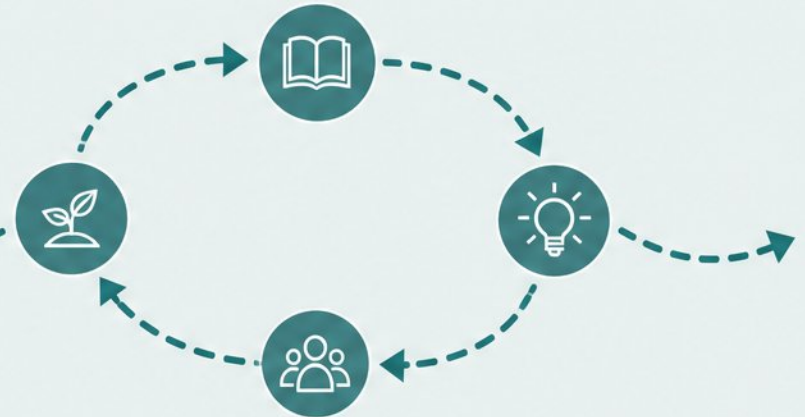
Customer Education vs. Onboarding and Support

Onboarding: One-Time Setup Event



VS.

Education: Continuous, Lifecycle-Wide Development



- Onboarding: one-time setup event



- Education: continuous, lifecycle-wide development



- Support: reactive; Education: proactive deflection



- Distinct positioning secures ownership, budget, roadmap

Typical Pitfalls and Skill Gaps to Avoid



- Disconnected tutorials, no coherent learning journey



- Internal product focus, not customer jobs-to-be-done



- Unclear ownership and content maintenance plan



- No distribution strategy for education content



Defining Learner Segments



- Segment by role, lifecycle stage, maturity, product tier, and entry point



- Separate admins, end users, executives, partners, and prospects



- Each segment has distinct learning needs and desired outcomes



- Move from generic library to measurable, outcome-driven programs

By Role



Admins

By Lifecycle Stage



End Users

By Maturity



Executives

By Product Tier



Partners

By Entry Point



Prospects

Translating Jobs-to-be-Done into Learning Outcomes



- Start with customer jobs, not product features



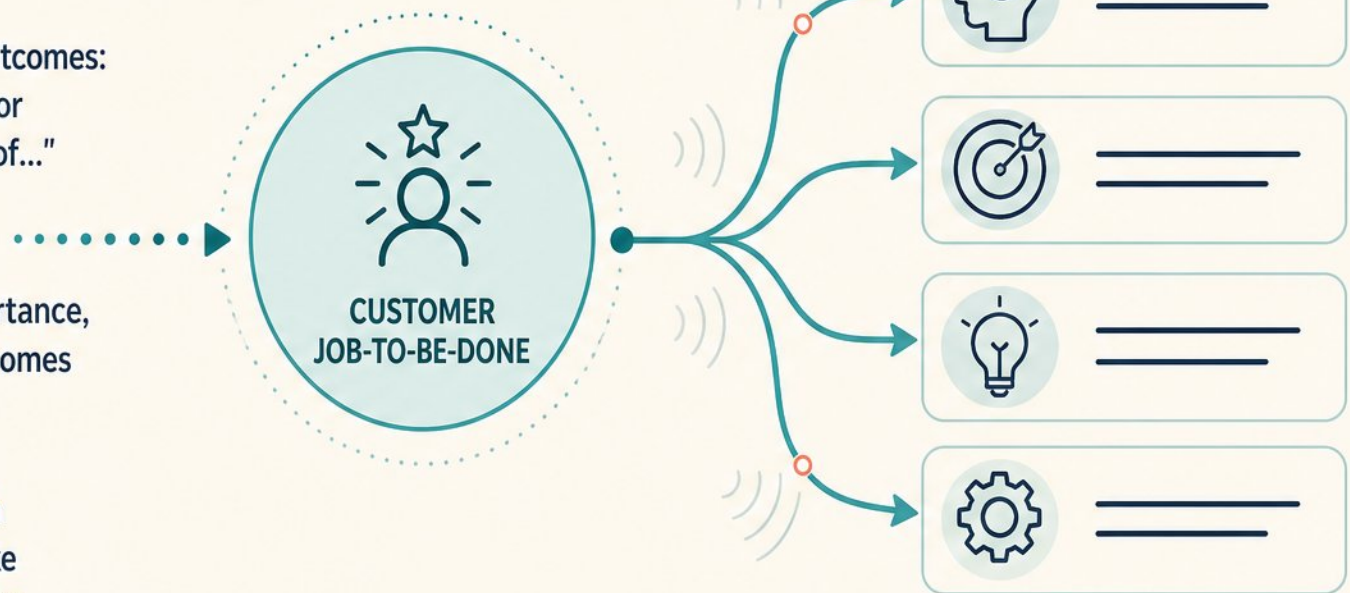
- Write measurable outcomes: "minimize time to..." or "increase likelihood of..."



- Prioritize high-importance, low-satisfaction outcomes



- Align education with business priorities like adoption and retention



Mapping the End-to-End Learning Journey



LEARNING FORMATS



Quick Wins



Guided Labs

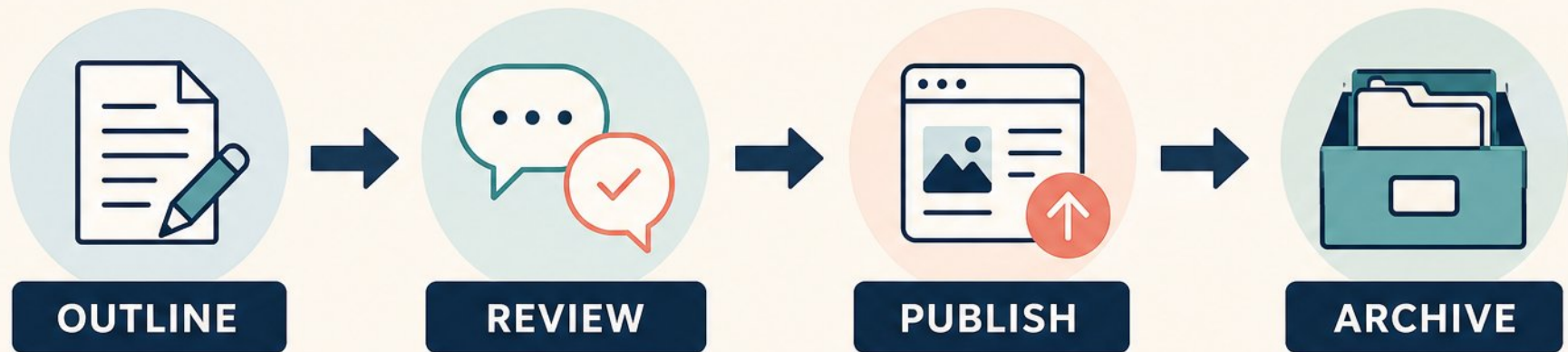


Certifications

- Map education from first login through advanced use and advocacy
- Match formats to lifecycle stages: quick wins, guided labs, certifications
- Connect learning journey directly to customer lifecycle
- Avoid over-producing content with a coherent, staged approach



Designing an Efficient Content Production Workflow



- Create a repeatable workflow: outline, review, publish, archive



- Define roles with lightweight approval steps for speed



- Use templates and office hours to focus SME input



- Set structured review cycles to keep content current



Selecting Tools and Systems for Delivery and Tracking



- Choose platforms built for external audiences, not internal LMS workarounds



- Prioritize native certification, role-based paths, and branded portals



- Validate integration depth with CRM, support, and product analytics



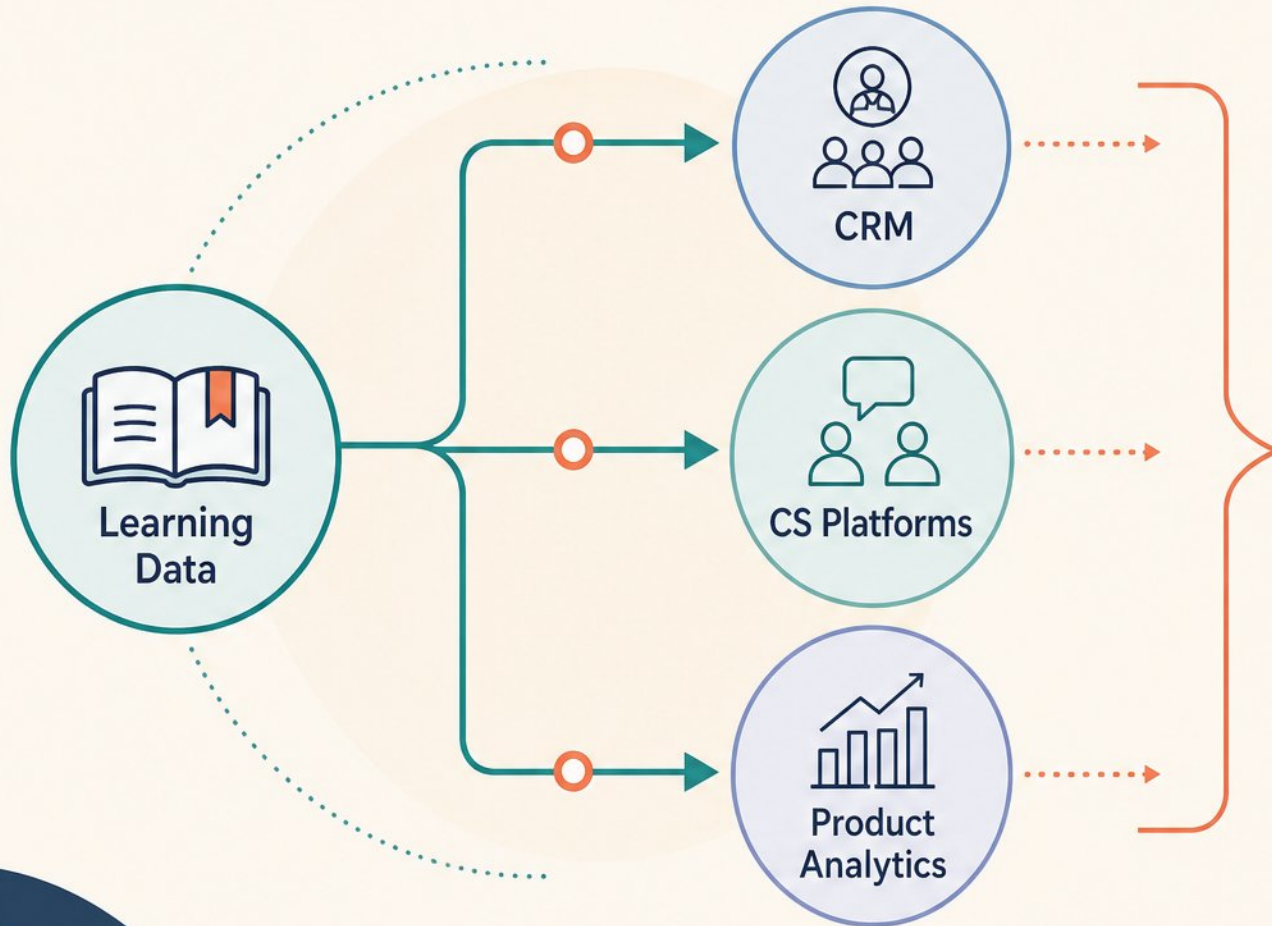
- Confirm operational fit: mobile access, enrollment model, and reporting



- Stress-test total cost of ownership and scalability before signing



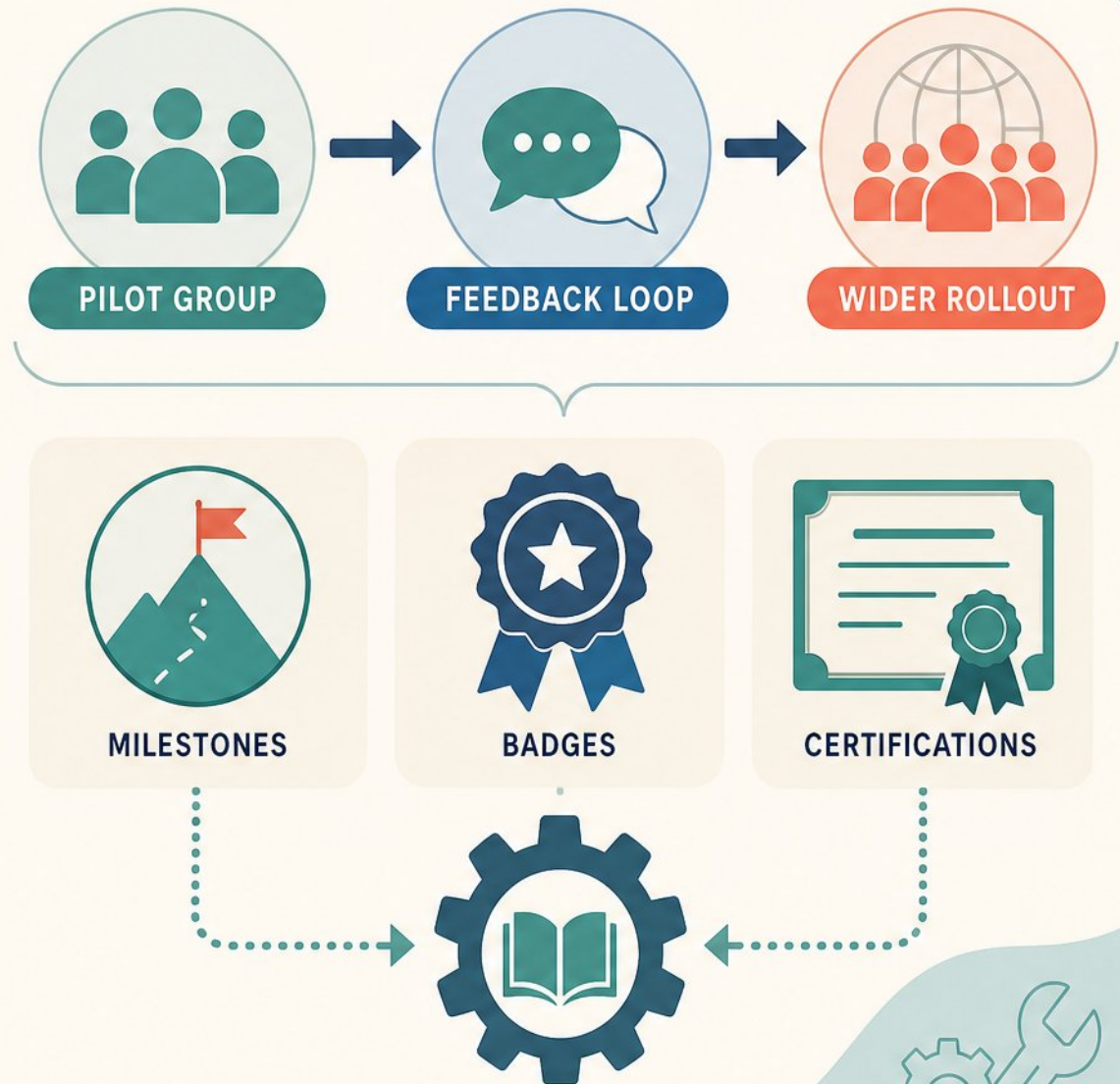
Integrating Education Data with Business Systems



- Connect learning data to CRM, CS platforms, and product analytics
- Use CRM triggers for enrollment, adoption nudges, and renewal-risk alerts
- Feed completion and certification data back to CS teams
- Link training engagement to retention, expansion, and cost-to-serve

Launching and Driving Adoption of the Program

- - Sequence launches: pilot group, feedback loop, then wider rollout
- - Promote through onboarding and customer success touchpoints
- - Use milestones, badges, and certifications to sustain engagement
- - Trigger behavior-based content delivery to keep learners active



Measuring Impact Across Three Tiers



- Track engagement: completion, active learners
- Track behavior: adoption, stickiness, ticket deflection
- Track business: retention, NRR, ROI
- Report business impact to leadership
- Pick one KPI per tier, connect them

Iterating the Program with Data



IMPACT
DASHBOARD



- Run cohort analysis: compare educated vs. non-educated customers on churn and adoption



- Establish a lightweight review cadence to update, retire, or expand content



- Track version history, last-reviewed dates, and content owners



- Use data-driven iteration to move beyond activity metrics toward business impact

Cohort Comparison

Educated vs. Non-Educated Customers

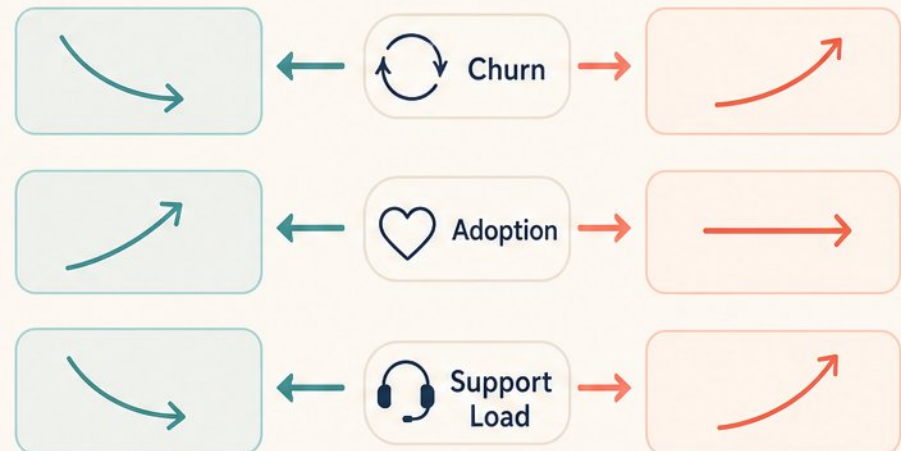


Educated
Customers

VS.



Non-Educated
Customers



Building Your 90-Day Action Plan

-  ▶ - Start with the first-value onboarding path, not the full library
-  ▶ - Pick one segment and one measurable outcome to pilot
-  ▶ - Focus on time-to-value metric to show activation impact
-  ▶ - Deliver early wins for customer success and leadership
-  ▶ - Scale only after the pilot proves the business case



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