



Customer Education Fundamentals



- Structured program teaching customers to get value—not just docs



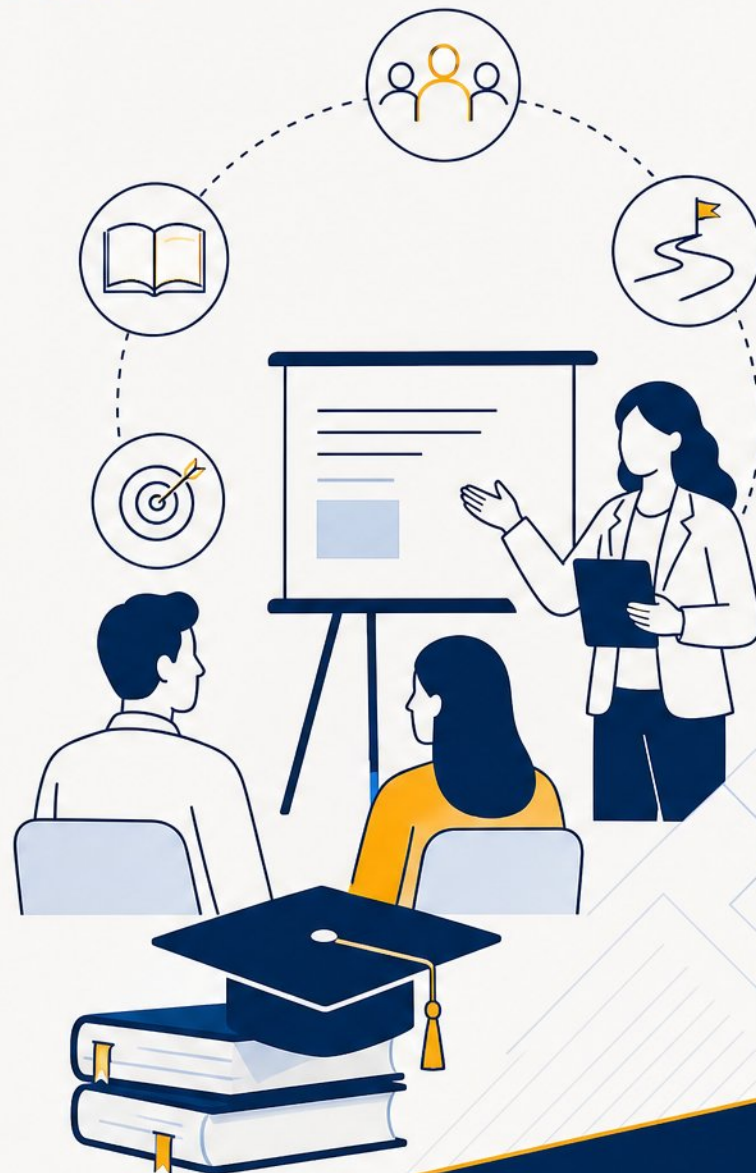
- Program has owners, roles, curriculum paths, and success metrics



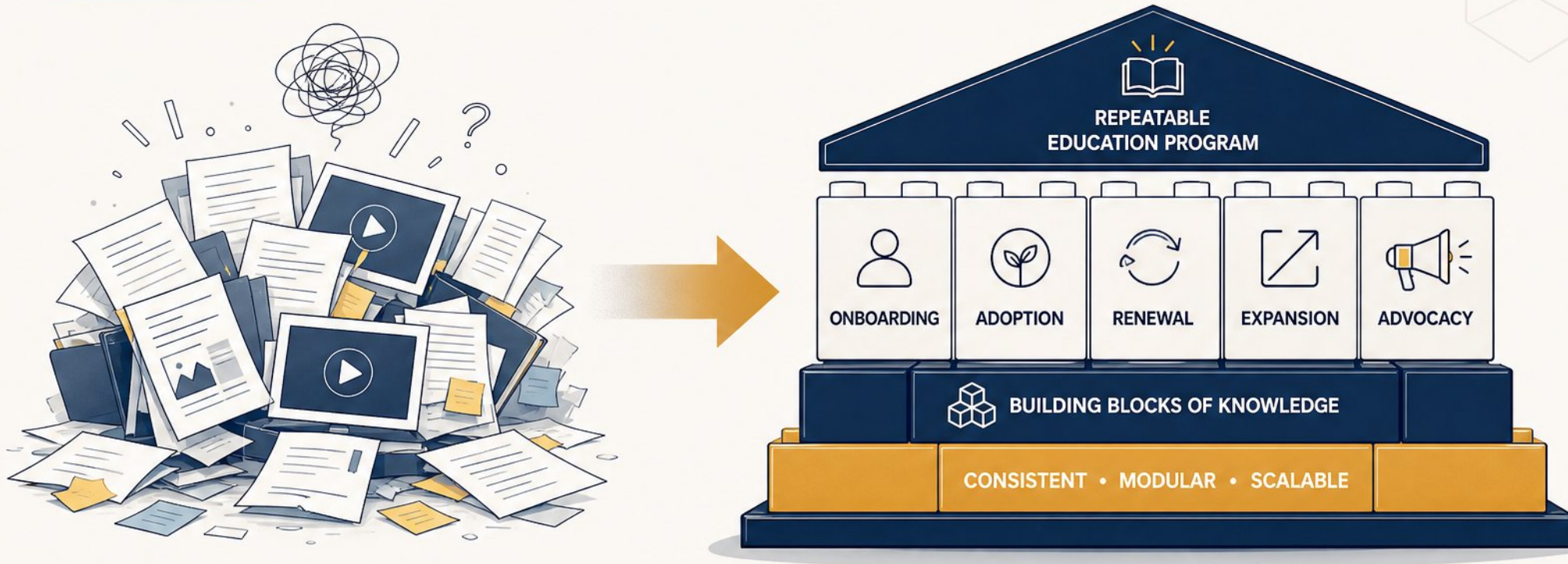
- Course promise: map audiences, design measurable learning, build roadmap



- Tied to CSAT, retention, adoption, expansion, and reduced support load



Why Customer Education Needs to Be a Program



- Move from reactive Q&A and one-off webinars to a repeatable system



- Connect learning to onboarding, adoption, renewal, expansion, and advocacy



- Education influences time-to-value, support load, and retention—not sole cause



- Use contribution language like 'can reduce' and 'tends to shorten'

The Business Case Behind Customer Education



- Frame as a claim on outcomes execs already track, not a course catalog



- Use support tickets, CSM hours, renewal rate, and time-to-value



- Anchor on three tiers: business impact, behavior change, engagement



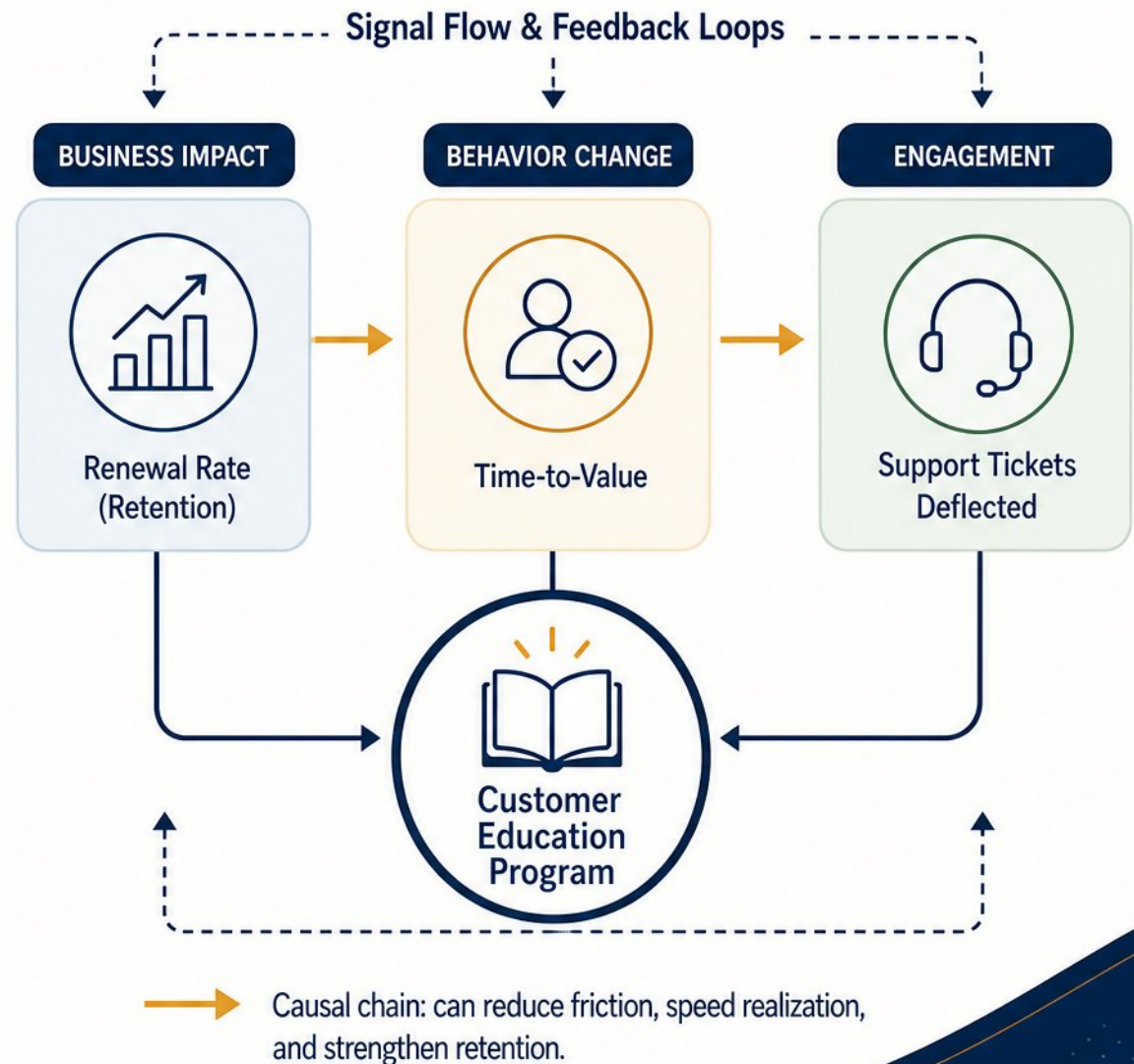
- Connect one metric from each tier to show the causal chain



- Use contribution language: 'can reduce', not 'causes'



- Name assumptions before stakeholders challenge them





Core Concepts and Maturity Stages



Reactive
answers



Reusable
base



Contextualized
delivery



In-product
learning



Measured
scale



- Curriculum, learning paths, certification, just-in-time learning, self-serve onboarding



- Maturity: reactive answers → reusable base → contextualized delivery → in-product learning → measured scale



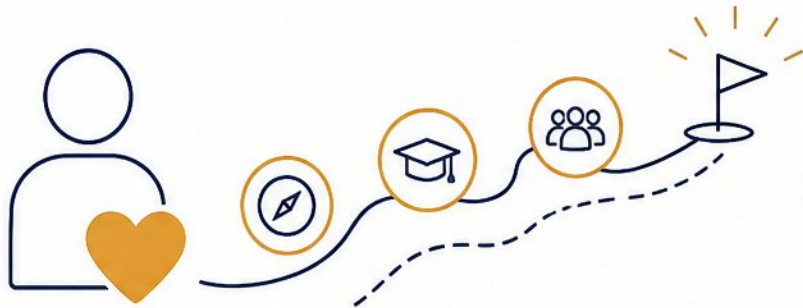
- Match maturity to realistic team size, tooling, and measurement expectations



- Three jobs: create, deliver, scale—most teams underinvest in delivering and scaling

Who Needs Customer Education

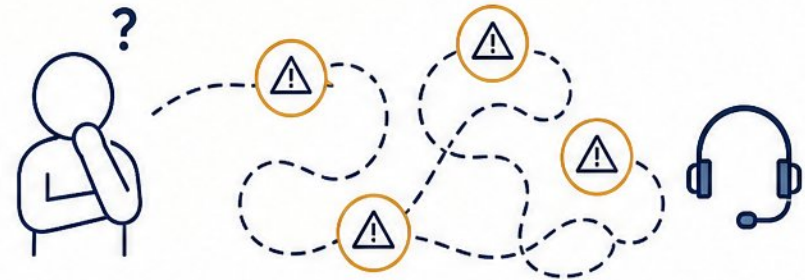
HIGH-TOUCH ACCOUNT BEHAVIOR



Proactive learning, confident usage,
and strong outcomes.

VS

TYPICAL ACCOUNT BEHAVIOR



Repeated friction, more support tickets,
and inconsistent outcomes.



- Repeated support tickets signal a teaching gap



- High awareness with low adoption reveals a training problem



- Multi-step workflows and role-based mastery need formal education



- Sponsors: Customer Success, Support, Product, Finance



- Education supports outcomes—it doesn't replace product clarity



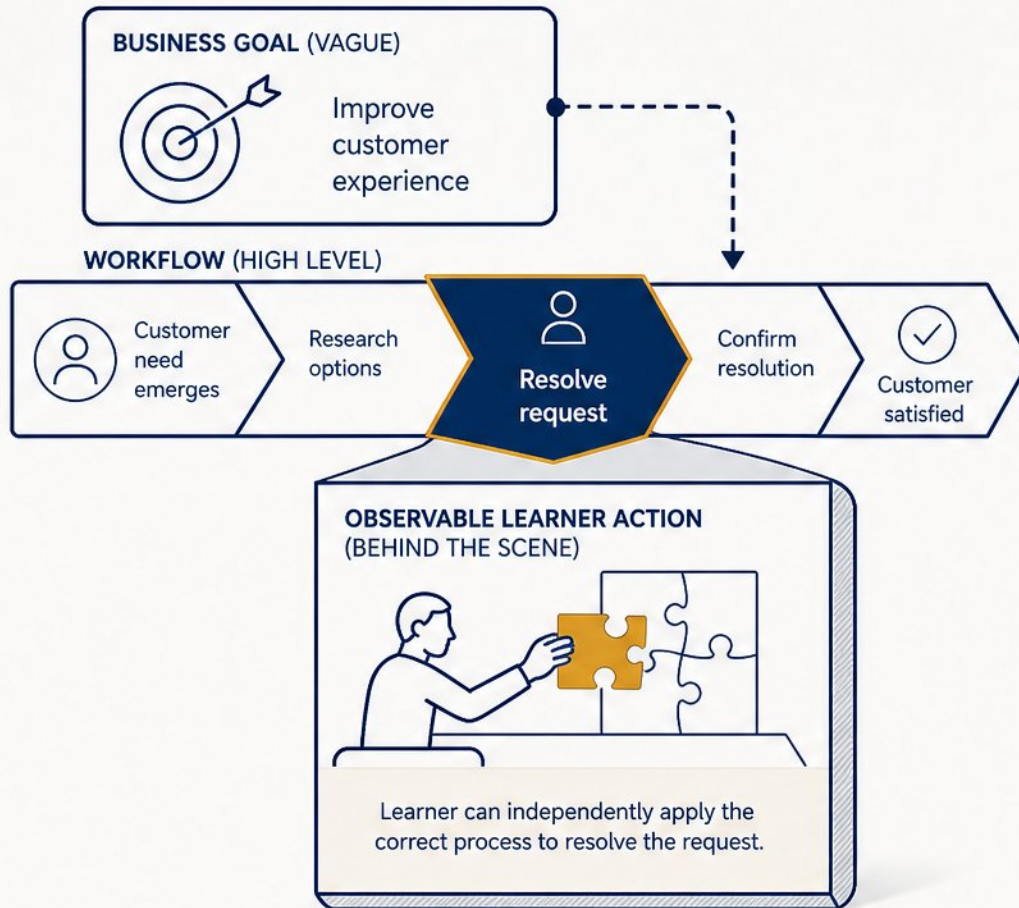
Segmenting Audiences by Role and Context

- Group learners by job role, goals, workflow context, and lifecycle stage
- Target segments: admins, end users, occasional users, decision makers, partners, power users
- Write five to eight 'can independently do X' statements per role
- Prioritize audiences by business impact, learner pain, support load, and expansion potential

Ecosystem of Roles



Defining Measurable Learning Outcomes



- Translate business goals into observable, workflow-based learner outcomes



- Define competencies as "can independently do X" actions



- Pair completion data with adoption, deflection, and time-to-value evidence



- Track one metric from each tier: impact, behavior, engagement



- Avoid vanity metrics by comparing educated versus non-educated cohorts

CUSTOMER JOURNEY BLUEPRINT



Customer need emerges



Research options



Resolve request



Confirm resolution



Customer satisfied

Choosing Content Formats and Delivery Channels



- Match format to the job, not to fashion



- In-app guidance: first-time tasks and moment-of-need help



- Documentation: searchable reference and edge cases



- Courses and certifications: structured role mastery



- Avoid asking one channel to do everything

LEARNING MOMENTS / BEST FIT				
 IN-APP GUIDANCE	 DOCUMENTATION / KNOWLEDGE BASE	 COURSES	 CERTIFICATIONS	 COMMUNITY
 First-time tasks and moment-of-need help	 Searchable reference and edge cases	 Build foundational knowledge and skills	 Validate mastery and structured role growth	 Peer support, shared insights, and discussion
 From immediate help to deep mastery				

In-App Learning and Just-in-Time Support



- Guidance layered directly on the product interface



- Tooltips, checklists, tours, embedded videos, contextual help



- Reaches users who never visit a separate academy



- Best for procedural, urgent, or rapidly changing tasks



- Builds task fluency; certification still needs structured learning

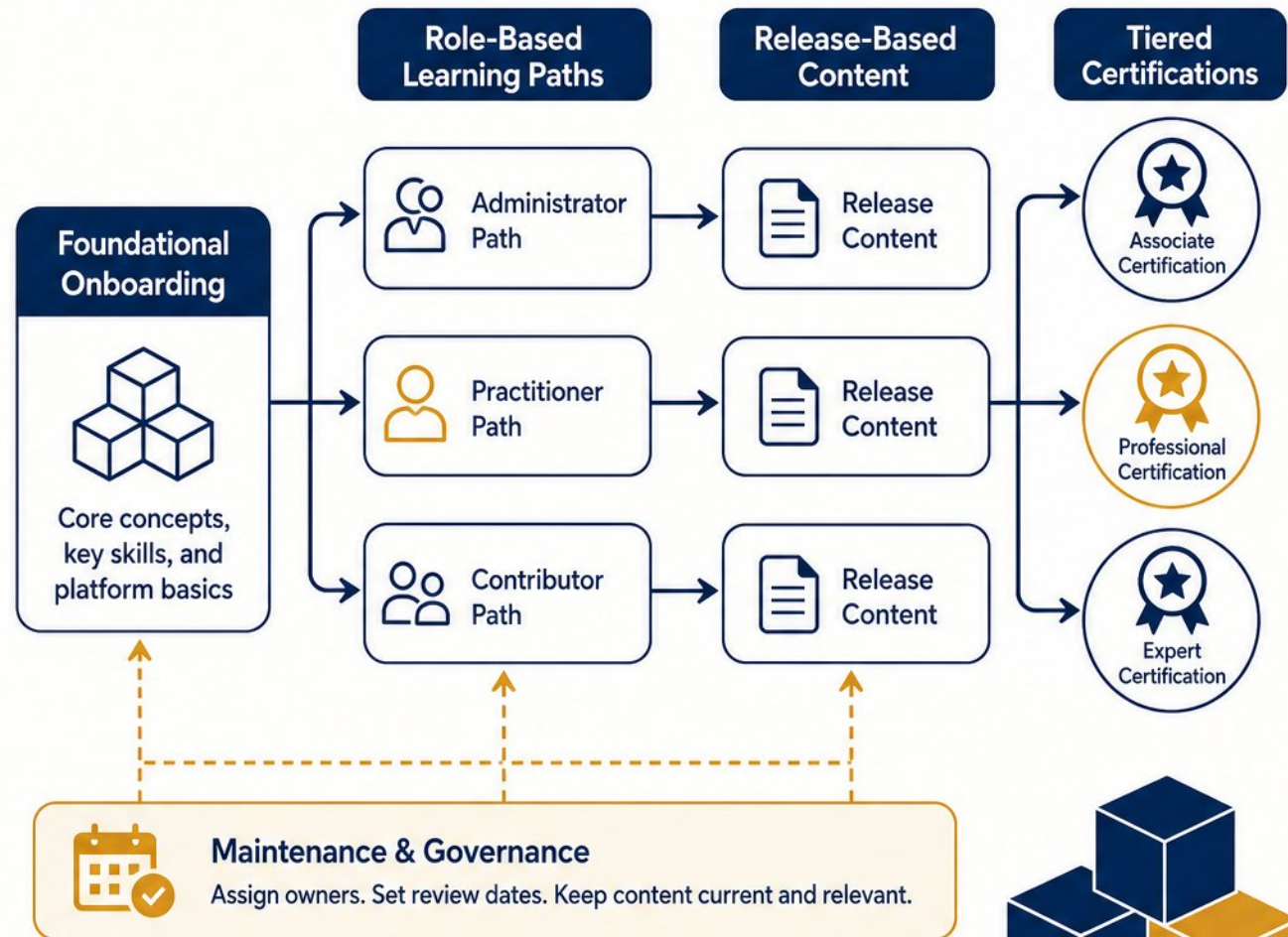


— Signal Flow & Feedback Loops —



Building a Scalable Curriculum

- Structure content into modules, role-based learning paths, and tiered certifications
- Balance foundational onboarding with role-specific and release-based material
- Plan maintenance from day one: assign owners and set review dates
- Sequence by competency, not internal feature organization



Measuring What Actually Matters



- > Connect three metric tiers: impact, behavior, engagement
- > Track leading signals: completion, adoption, time-to-value
- > Compare educated vs. non-educated cohorts to show cause
- > Report executive impact metrics; use behavior as evidence

Running a Pilot That Proves Value



- Start focused: one competency for one high-impact role



- Pick from repeated tickets or feature awareness gaps



- Define upfront behavior-change success criteria



- Measure adoption or deflection, not content views



- A working walkthrough beats an unused course library



ONE SUCCESS METRIC:
ADOPTION OR DEFLECTION,
NOT CONTENT VIEWS



From Pilot to Ongoing Operations



- Define roles, workflows, and tools for a repeatable operating model



- Match platforms by job: KB for reference, DAP for in-app, LMS for certification



- Adopt high-performing habits: refreshed content, tiered certifications, proactive re-engagement



- Plan maintenance at the source to prevent broken tours and outdated steps



Action Plan and First 90 Days

- Audit current metrics; choose one pilot, align one sponsor
- Month 1: define roles, success metrics, and decision framework
- Month 2: create and ship one focused piece of content
- Month 3: measure behavior change, then expand
- Track one impact, one behavior, one engagement metric



30 DAYS

Month 1: define roles, success metrics, and decision framework



One impact metric



One behavior metric



One engagement metric



60 DAYS

Month 2: create and ship one focused piece of content



One impact metric



One behavior metric



One engagement metric



90 DAYS

Month 3: measure behavior change, then expand



One impact metric



One behavior metric



One engagement metric



STAKEHOLDER CHECKPOINTS



PersonWise.

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