

Why Customer Education Matters



- Structured, proactive learning that helps customers achieve true product value



- Transforms reactive support into scalable, proactive enablement



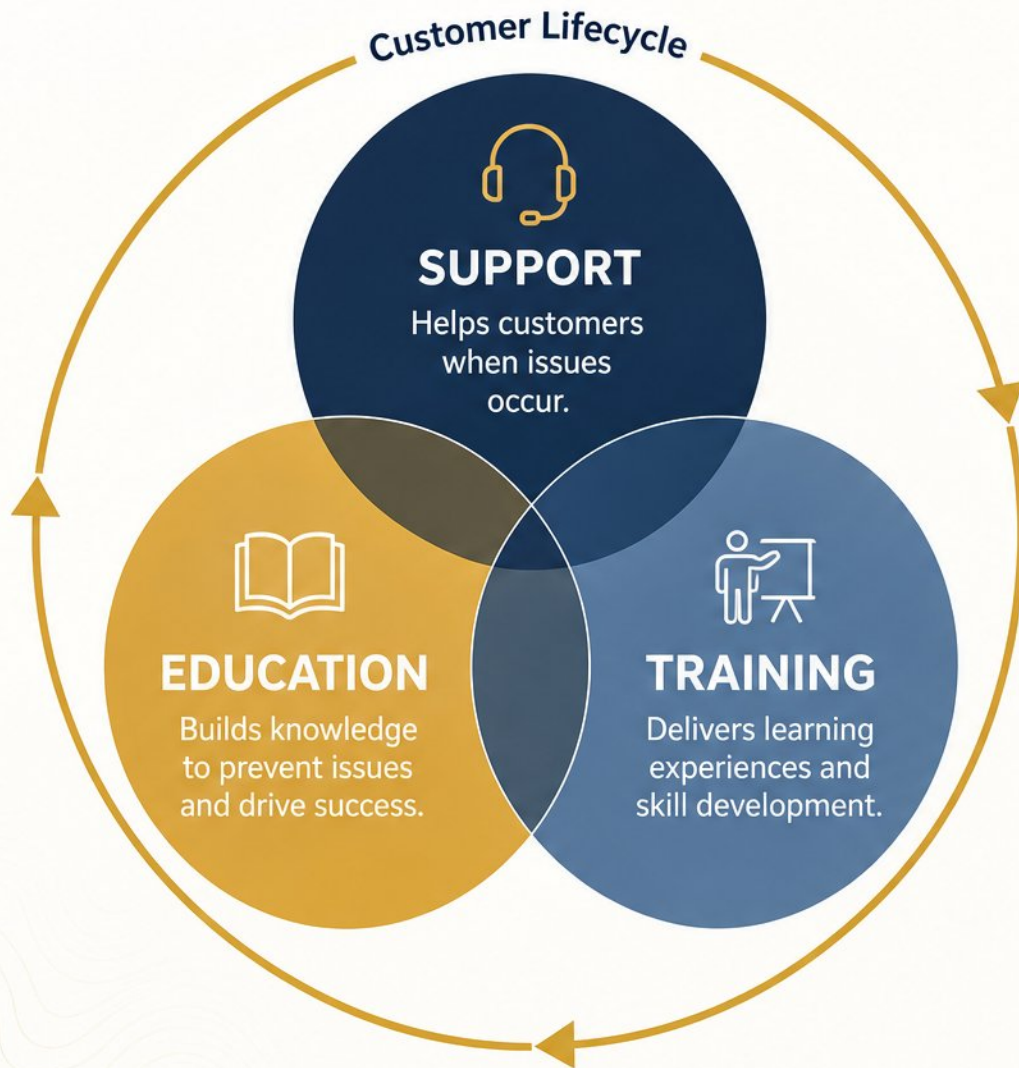
- Proven business results in adoption, retention, support costs, and revenue



- Directly connects customer success, training, and content to business outcomes



What We Mean by Customer Education



- Education prevents issues; support solves issues after they occur
- Spans onboarding, certifications, webinars, in-app guidance, and community
- Education is the strategy; training is the delivery layer
- Typically owned by Customer Success or a dedicated education team
- Requires cross-functional collaboration with product and support



The Cost of Not Educating Customers



- Roughly 20% of churn happens in the first 30 days



- Repetitive questions become tickets and inflate support costs



- Customers miss advanced features and fail to expand usage



- Growth is capped when every new cohort needs more headcount



- Average support desk ticket costs about \$22



Business Impact: Adoption, Retention, and Expansion



- Formal programs show a 38.3% average lift in product adoption



- Trained customers renew at higher rates and expand usage



- Education drives faster onboarding to renewal and advocacy



- High-maturity programs compound revenue, retention, and expansion benefits



Adoption



Retention



Expansion



The Revenue and Cost Case for Executives



- Executives prioritize revenue, retention, efficiency, and growth—not course completions.



- Education lowers cost-to-serve and accelerates time-to-value.



- Strong programs improve net revenue retention.



- Position education as an activation and growth motion, not a cost center.



- Tailor the case for CROs, CPOs, CMOs, and CFOs.



What Strong Programs Get Right



- Anchor education to outcomes the business already tracks, not just learning activity



- Maintain current content with tiered certifications and repeat participation via Customer Success



- Embed education in-product; trigger learning per user, not just per account



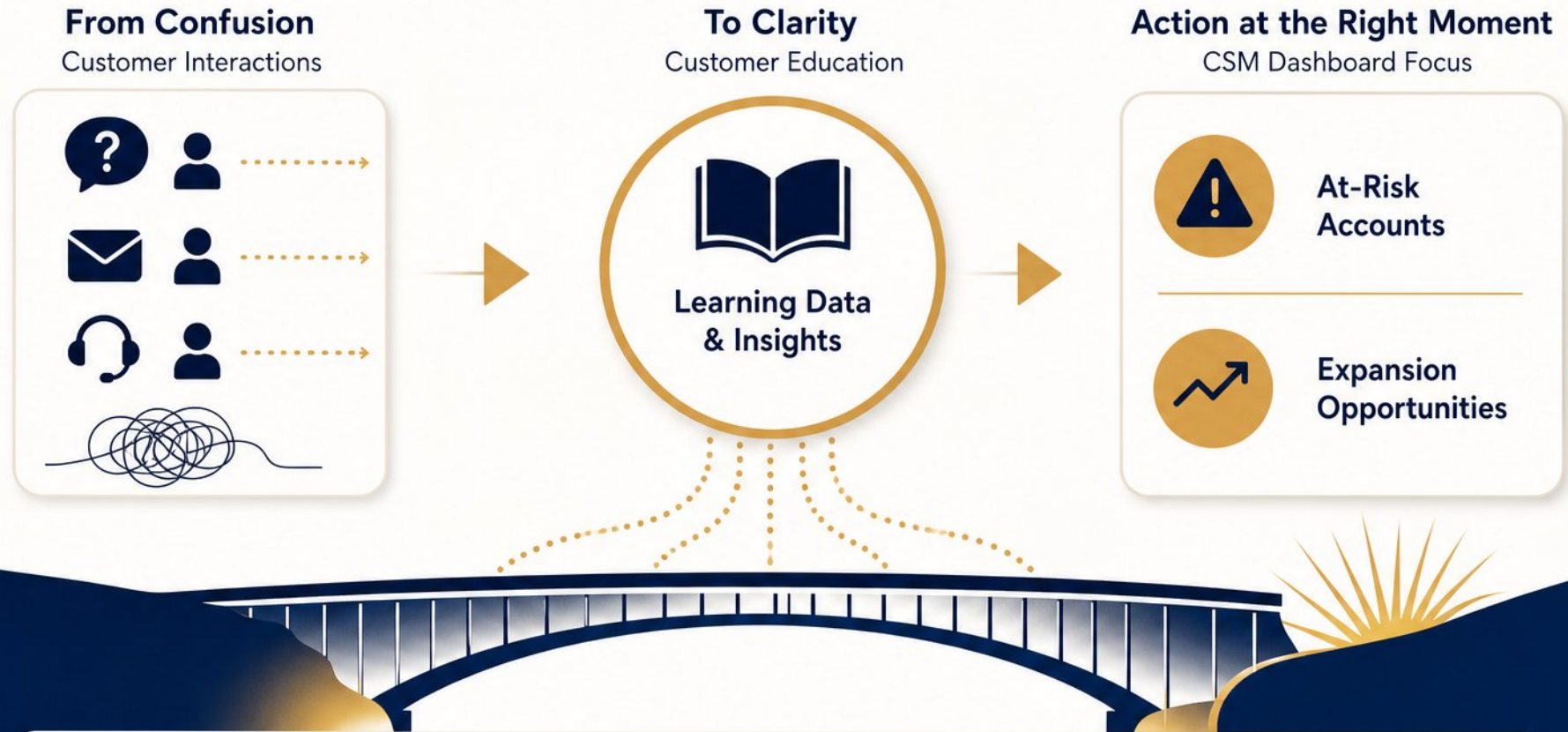
- Mature from reactive support to revenue-aligned impact



- Top programs prove value: only 1 in 6 reach true maturity



How Customer Education Supports Customer Success Teams



- Scales onboarding without high-touch calls for every customer
- Learning data flags at-risk accounts and expansion opportunities early
- Content targets recurring adoption barriers from customer conversations
- CSMs intervene at the right moment, not after churn signals appear

Designing Effective Learning Paths



- Build paths by role, stage, and outcome—not by feature list



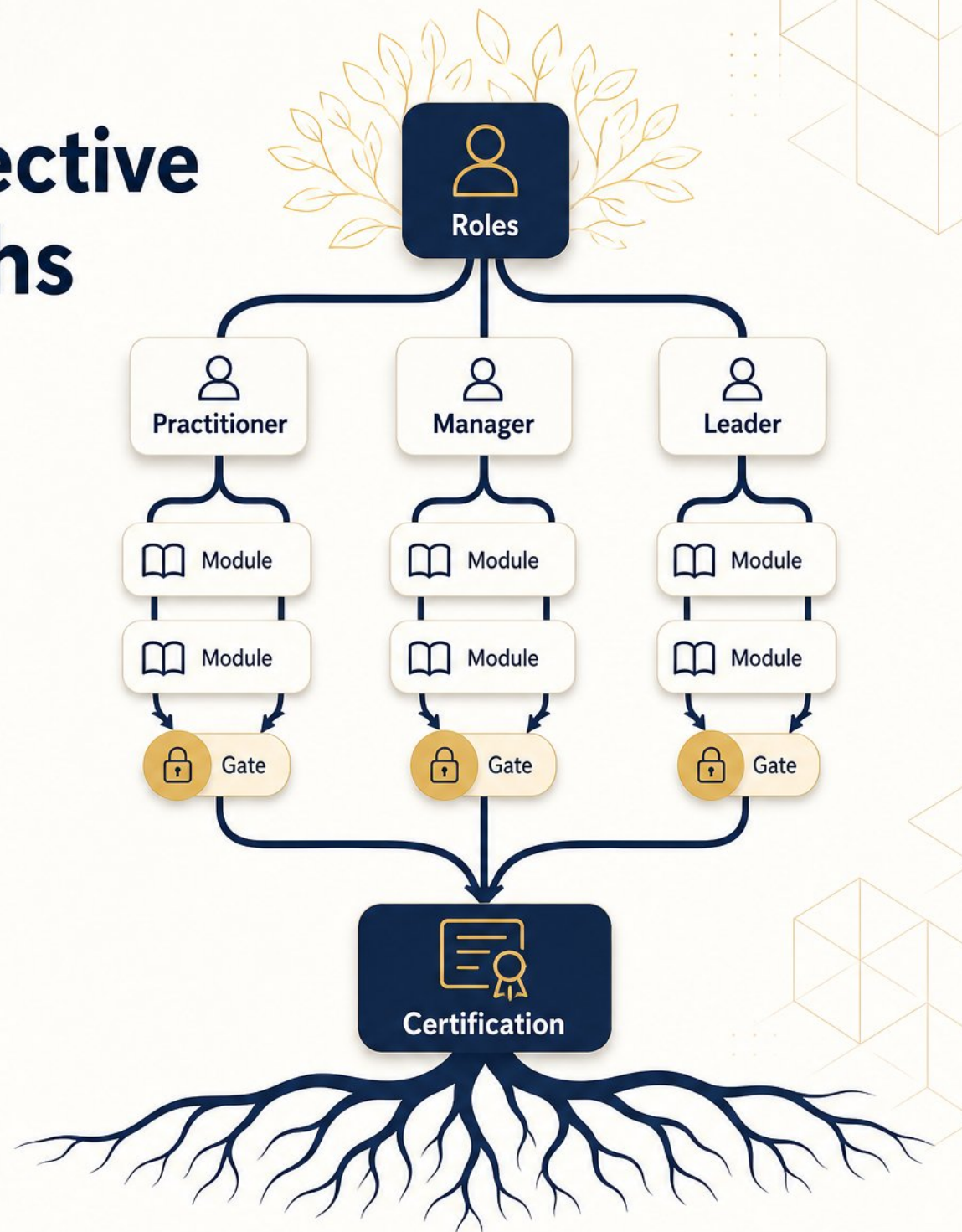
- Define competencies: "can independently complete workflow X"



- Keep modules short, focused, and sequenced with progression gates



- Use certification and assessment as adoption signals and readiness checks



A Content Creator's Role in Customer Learning

Help customers succeed by delivering the right content, in the right way, at the right time.



1 Create task-oriented content aligned with real customer jobs.

- Start with the customer job to be done.
- Focus on outcomes, not features.
- Keep it concise, clear, and actionable.

EXAMPLES



How-to guides



Step-by-step walkthroughs



Checklists & templates



2 Match format to learning moment: in-app, docs, courses, live sessions.

- Meet learners where they are in their journey.
- Use the right format for the right moment.
- Make content easy to find and consume.

FORMATS



In-app: tooltips, modals, guides



Docs: references, how-tos, FAQs



Courses: self-paced learning paths



Live sessions: webinars, Q&As, office hours



3 Maintain content as a living system with owners and review dates.

- Keep content accurate, up-to-date, and useful.
- Assign clear ownership.
- Review and refresh on a set cadence.

CONTENT HEALTH CHECK

Content	Owner	Last Review	Next Review
Getting Started Guide	A. Lee	May 1, 2024	Aug 1, 2024
API Quickstart	J. Kumar	Apr 15, 2024	Jul 15, 2024
Feature Tutorial: Reports	M. Chen	May 10, 2024	Aug 10, 2024
FAQ: Billing	S. Patel	May 5, 2024	Aug 5, 2024

Review. Refresh. Improve. Repeat.



4 Collaborate with SMEs, support, and product teams for accuracy.

- Leverage subject matter expertise.
- Validate for accuracy and relevance.
- Close the loop with feedback and insights.

KEY PARTNERS



SMEs: ensure technical accuracy



Support: surface real questions and pain points



Product: stay aligned on roadmap and changes

HOW WE COLLABORATE



Discover
Understand jobs, pain points, and context



Align
Work with SMEs, support, and product



Create
Build clear, accurate, and actionable content



Validate
Review with partners and iterate



Measure
Track usage, feedback, and outcomes



IMPACT: Empower customers to learn, solve, and achieve more—driving adoption, retention, and satisfaction.

From Content Library to Measurable Program



- Completion rate is a leading indicator, not proof of impact



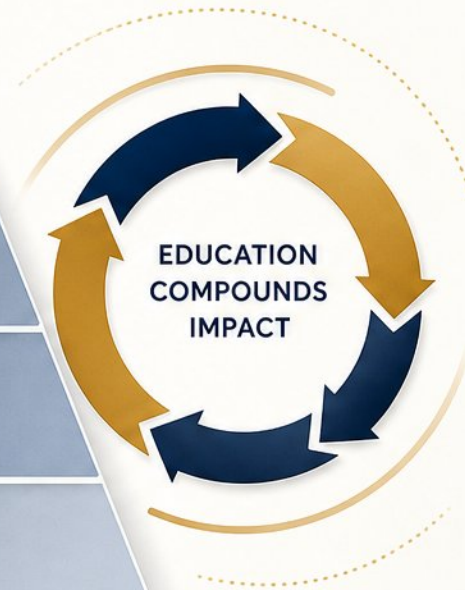
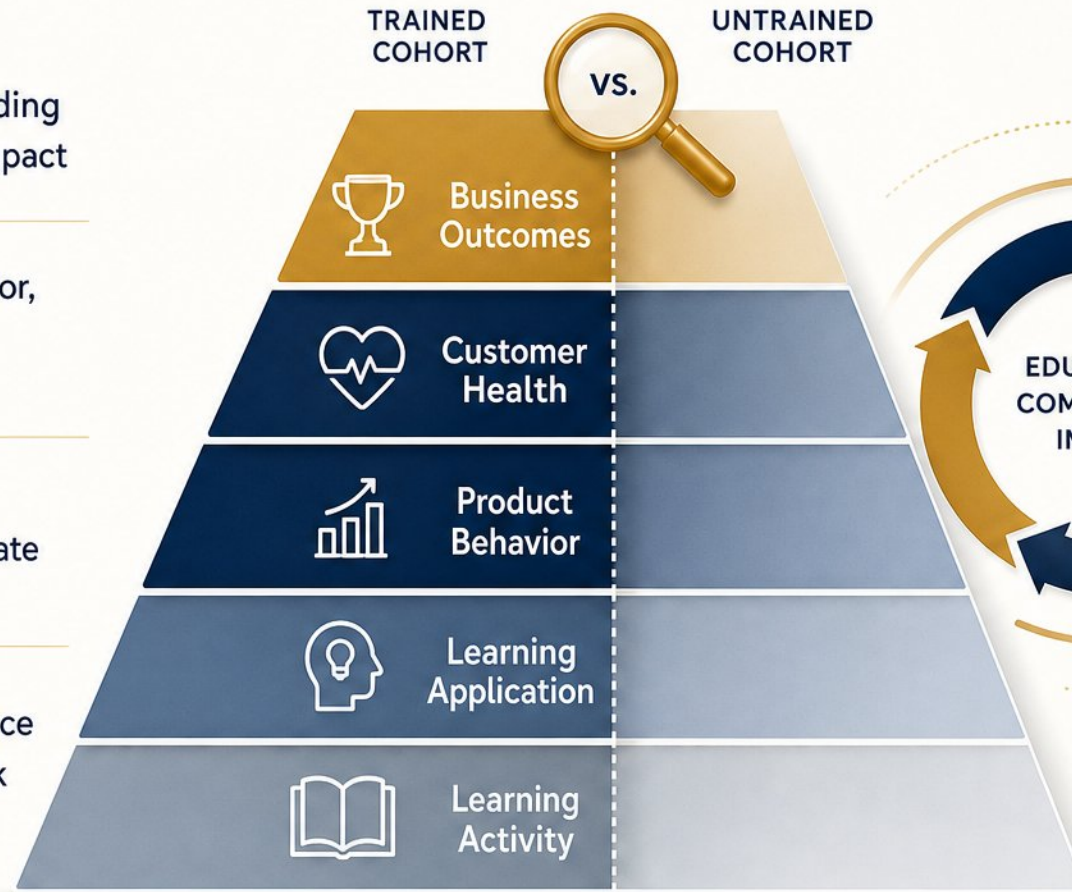
- Measure product behavior, customer health, and commercial outcomes



- Compare trained vs. untrained cohorts to isolate education's effect



- Use the five-rung evidence ladder as your framework



Metrics That Move Business Decisions



- Track time-to-first-value and activation milestones to prove faster onboarding



- Track ticket deflection and first-contact resolution to show reduced support burden



- Track feature adoption and stickiness to demonstrate real behavior change



- Track retention, expansion, and ROI to connect education to leadership's existing numbers



- Compare trained vs. untrained cohorts to isolate education's contribution



Common Barriers and Practical Solutions



- Low engagement: content too long, irrelevant, hard to find



- Break courses into 10-30 minute focused experiences



- Use multiple formats to match different learner needs



- Content silos need clear owner, governance, review cadence



- Proving impact requires LMS connected to CRM and analytics



Launching or Improving Your Program



- Start with a minimum viable academy for one high-impact audience



- Prioritize top support questions and best-to-typical account gaps



- Use a 30/60/90-day roadmap to show early progress



- Name a single owner and define governance from day one



30-Day



60-Day



90-Day



Action Plan and Next Steps



- **Customer Success:** identify top onboarding friction points and adoption questions

- **Training leaders:** define measurable outcomes and baseline metrics before launch

- **Content creators:** map top questions to formats, assign owners and review dates

- **Within two weeks:** set success metrics, ownership, and governance

- **Start with** a minimum viable academy for one high-impact audience

OWNER

REVIEW DATE

PersonWise.

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