



# The Customer Education Playbook

A Methodology for Developing Impactful, Engaging, and Measurable Customer Education Programs





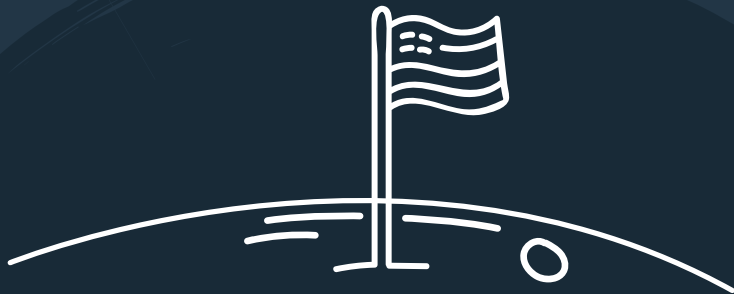
## Abstract

The Customer Education Playbook provides a validated methodology for developing, implementing, and evaluating a customer education program. Whether you're looking to scale onboarding, grow your brand, drive customer engagement, or become the new professional standard, this methodology is your guide to engaging and impactful customer education.

## Key Takeaways

By adopting the Customer Education Playbook into your education strategy, you'll be able to:

- Connect customer education to broader business goals
- Develop, implement, and distribute a dynamic content strategy
- Get organizational buy-in and engage your SMEs
- Identify opportunities to improve and maintain relevance
- Measure the impact of training on customer success and revenue



## INTRODUCTION

# Finding Our Way to the Customer Education Playbook

You know the feeling you get when you sit down to a project and you don't know where to begin? You head one direction, then backtrack and head another, until you're wandering aimlessly and feeling lost.

We hear from many customer education professionals who feel this way. It's not always clear where to begin, and it's tempting to rush to doing the things we're most comfortable doing. For some, it's creating content. For others, it's brainstorming ideas.

We developed the Customer Education Playbook to provide a beacon for anyone who wants a clear and structured methodology for success. We conducted nearly 200 interviews with professionals like you, and we found that the common goal is to:

## Educate Customers to Achieve Success

We discovered that to accomplish this goal, you must follow 12 measurable steps tied to your business goals to help you accomplish the ultimate goal of customer education—help your customer achieve their success.

Within the Customer Education Playbook you'll get the details of each step to guide you through your organization's customer education strategy.

Are you ready to take your customer education out of this world?

# 1

## Define Your Goals for Customer Education



Think of your customers, prospects, channel partners, dealers, suppliers, franchisees, developers, as well as your contract workforce. Every business ecosystem depends on some combination of these constituents. **And the more they know about your products and services, the more profitable those relationships are likely to be.**

– [John Leh](#)

CEO & Lead Analyst, Talented Learning

When seeking executive buy-in to stand up a customer education program, they will ask how much it's going to cost them and how much of a return on investment they'll earn.

They know it's important to educate your customers, but in order to validate the spend, they need to know the financial benefits.

When setting your goals for customer education, you need to look at the company's overall goals for success, evaluate where exactly customer education fits into those goals, and then identify any metrics that can be tied back to your initiative. For example, will training create a new revenue stream? How will it impact product adoption, or deflect support tickets?

To get your gears in motion, consider these questions as a jumping off point:

- ▶ What are your company's business goals?
- ▶ What does 'customer success' mean for your organization?
- ▶ What are the different metrics that should tie back to your customer education program's success?
- ▶ What are the cost metrics for customer education?

Asking these questions help you:

- Identify the organizational impact
- Tie it to revenue metrics which enables you to provide a clear cost-benefit analysis

Once you've identified those answers, you'll want to evaluate whether to monetize this content, and if so, determine the price. Consider the [pros and cons](#) of a "free" vs. "fee" customer education content strategy.

# 2

## Define Success for Your Customer



The ultimate goal of your education program is for your customers to succeed not only with your product, but also with the primary job your product serves.

For example, at Thought Industries, we don't just want you to know how to use our learning platform—we also want you to feel confident delivering outstanding training.

Start by deciding how your organization defines success—think about the problem your product or services are helping a business solve. It's important you put a clear definition here as it will tie into every step after. Not only does this ensure you develop good education materials, but it also ensures those materials resonate with your audience.

Consider these questions as you define success for your customers:

- ▶ What are their goals outside of your product?
  - Consider what job your customers are trying to achieve—how is their success measured?
- ▶ Then, flip it inward, what are their goals as it relates to your product or service?
  - How can your product or service align with your clients' overall goals?
- ▶ What metrics do your customers use to measure success with your product?
  - How do they know whether your product is helping them achieve results?
- ▶ Do your customer's goals vary based on different segments or demographics?
  - If so, ask the above questions for each segment.

Most importantly, ask these questions about your customers regularly throughout their journey. You need to understand your customer's needs early in the process, and continue to check on their progress over time. Their goals will likely evolve, and you need to ensure your program continues to meet those goals.

# 3

## Determine What Your Customers Need to Know to Achieve Success



When it comes to your content development plan, resist the temptation for perfection and obey the 80/20 Rule because Speed is everything. Every day that passes is another day your customers struggle (or rather, call their CSM or Support!)”

– Dave Derrington  
Senior Manager, Customer Education, Outreach  
Founder of CELab (The Customer Education Lab)

Once you understand your customers’ goals and your broader business goals, you can evaluate what your customers need to know in order to reach those goals. Take the time to segment your audience into learning personas, and then identify who needs to know what by when.

Core attributes you might consider in these personas include:

- At what point in the customer lifecycle are these learners? Prospect, onboarding, growth?
- Are they team leaders, content creators, or technical administrators?
- What segment are they in? What are the unique challenges for that segment?

Then, you can start unpacking what they need to know.

- ▶ What unique challenges does each learning persona experience?
- ▶ What areas of your product are core for helping your customers achieve success?
  - These are probably your product’s core functions, or most used features, and where you will want to focus your initial training efforts.
- ▶ What can you teach your customers that will make their outcomes with your product better?
  - For example, with HubSpot Academy, they aren’t just teaching you how to build a landing page with their platform. They also teach you how to build high-converting landing pages that bring results.
- ▶ Where are there gaps in what your product actually does vs. what your customers expect it to do?
  - It’s extremely important to align expectations with reality to minimize friction and frustration.
- ▶ Where do you know or anticipate customers to struggle? Most products have areas that cause some friction—sometimes, they are glaring, and other times they are harder to pinpoint.
  - We recommend you ask your product or support teams where customers have the most questions or support tickets.

**⚠** Once you’ve identified what your customers need to know, it’s tempting to start creating content. However, before you do that, you need to formalize your content strategy and development plan.

# 4

## Create a Customer Education Development Plan



So, you now have clarity on how your customers define success, and what your customers need to know to achieve it. That's an awesome start! Time to pull out the whiteboard: You now need to formulate all of this information into a development plan.

Developing a plan for your customer education program is complex work, so we recommend you tackle it in smaller buckets to ensure you cover everything. Let's start with the groundwork:

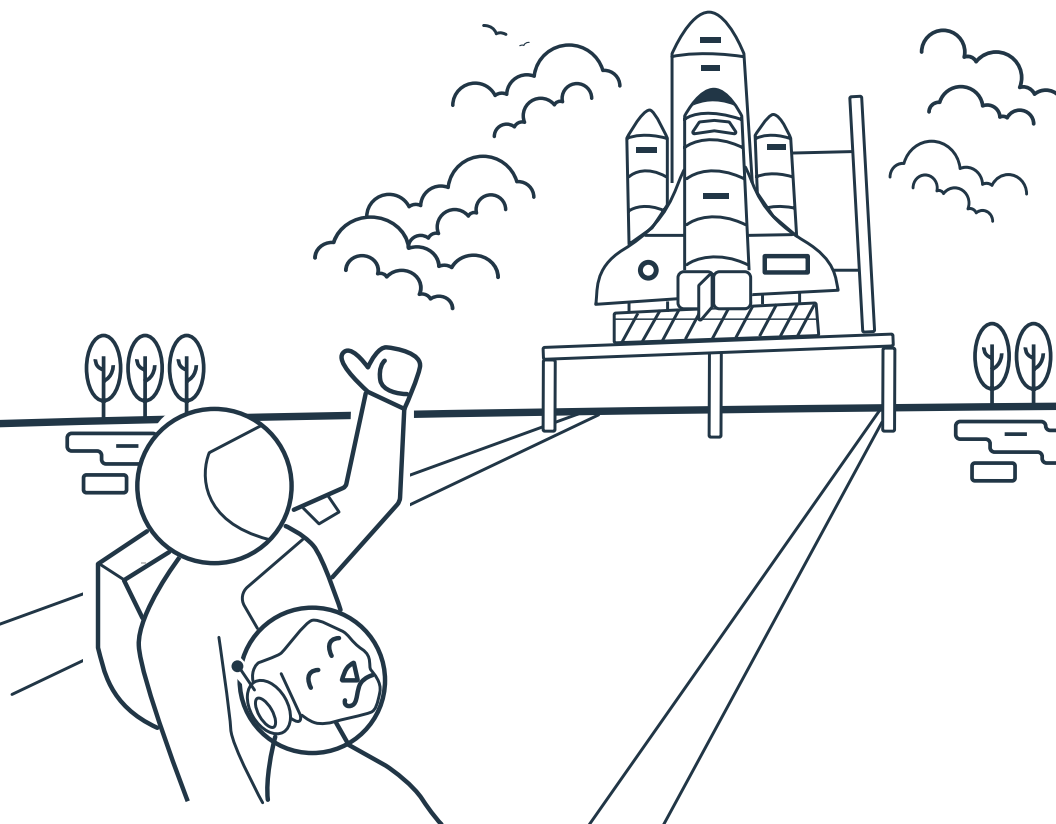
To get your gears in motion, consider these questions as a jumping off point:

- ▶ **Timeline**
  - How long will it take to curate and/or develop the content your customers need to learn?
- ▶ **Tech Stack**
  - Which tools do you need to stand up your initiative?
    - E.g. video recording tool, slide creator, gamification generator, etc.
  - Do you need to implement a new tool? How will this impact your timeline?
- ▶ **Assemble the Team**
  - Who is creating the content? Who is reviewing it? Who is approving it?
- ▶ **Budget**
  - Based on the plan and resources needed, what is the program going to cost?
- ▶ **Return on Investment (ROI)**
  - What outcomes do you hope to achieve? Are you monetizing content?
  - Are you planning to generate the ROI from customer retention, upsell, and expansion rates?
- ▶ **Organizational Buy-in**
  - Present the development plan, budget, and ROI to your executive stakeholders for final buy-in.

Once you have organizational buy-in, you're ready to get a lot more tactical in your planning process.

# 5

## Identify the Optimal Format for Educating the Customer



When you're determining the actual content creation side of your strategy, you'll need to consider the options. Is it best to use a video? Should this be live or self-paced? You want to ensure your training is in the right format to ensure the best experience possible.

When determining the optimal content format, consider the following:

- ▶ What are the most appropriate formats for the different types of information you're providing? For example, video is great to illustrate a concept or show 'how' to do something, but not as appropriate for verbal explanation.
- ▶ What are the production times and costs associated?
- ▶ How long will it take for the learner to consume the content in that format?
- ▶ Which formats are the most engaging without taking away from the lesson?
- ▶ Are you developing a single course, or a broader curriculum? Do you require blended learning with ILT or vILT embedded within the experience?
- ▶ Is the learning continuous or linear?

### Common Content Types:

- ▶ SCORM
- ▶ ILT
- ▶ Video
- ▶ Learning Paths

[Learn More](#)

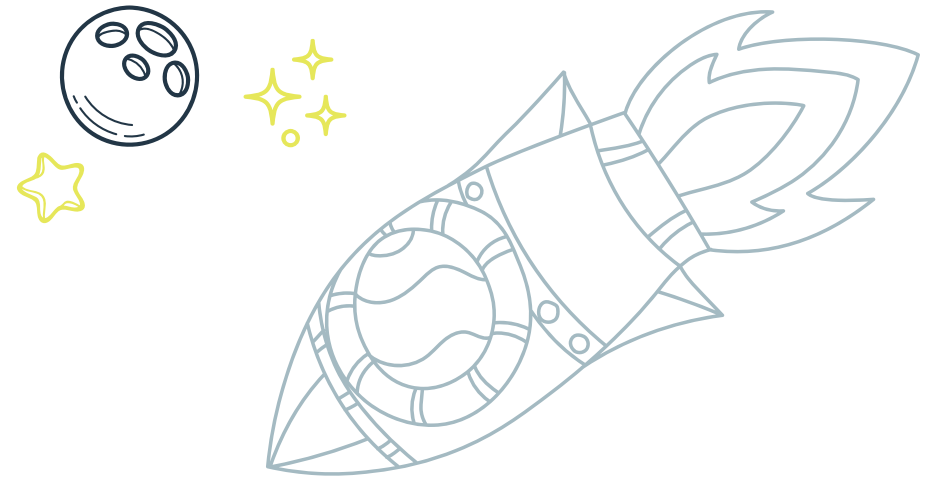


# 6

## Determine the Content to Include in the Education

“  
Learning doesn't stick with a single in-person experience.  
When we can reinforce that learning experience and create a  
continuum of learning... it deepens our impact.”

— Ellen Lempereur Greaves  
Life is Good Playmakers



It's very easy to overcomplicate the learning experience—just because a piece of content might help your customer achieve success doesn't mean it has to be included in your training program. We recommend you evaluate the relevance and importance of that content in relation to the learning objectives, and eliminate anything extraneous. Aim for a learning experience that is concise and engaging.

When determining the content to include, here are some questions you'll want to consider:

- ▶ How does your content align to expected learning outcomes?
- ▶ How can you curate and repurpose existing content, and what new content must you create?
- ▶ How will you ensure your content is accurate and up to date?
- ▶ How can you make the content more engaging?
- ▶ How will you keep this content within budget?
- ▶ Which customer questions do you anticipate?

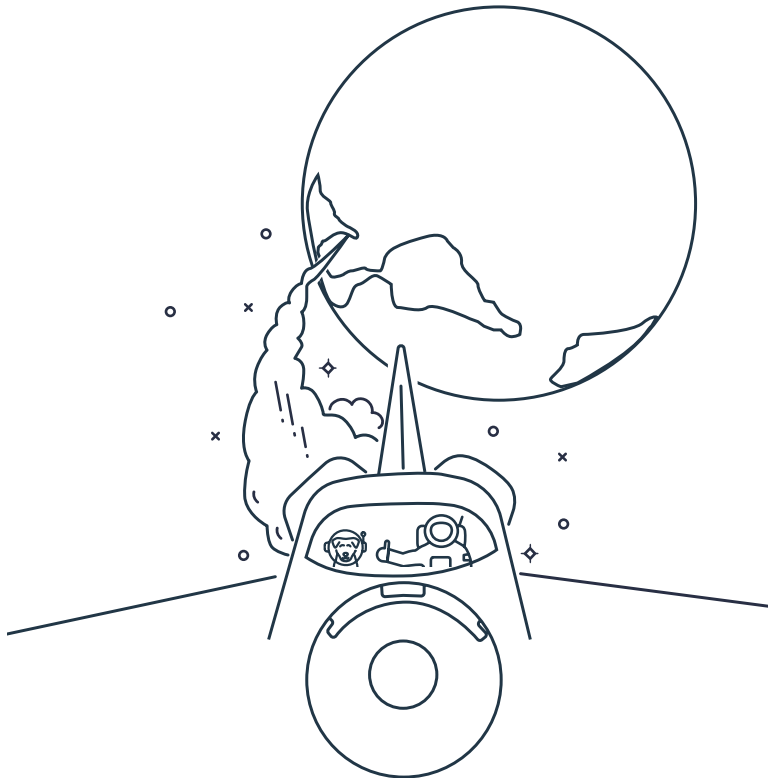
We recommend you build a modular content strategy that teaches the fundamentals that every customer needs to know, and from there build into your learning personas.

Then, consider how to evolve the curriculum to include topics that align with customer goals outside your product or service.



# 7

## Educate Your Team Who Will Deliver Customer Education



In order to teach your customers how to be successful with your product, your education team will first need to understand your product and how it will help your customers achieve their goals. You'll need a strategy to educate your own team!

Some key things to keep in mind, especially if someone has recently joined your team:

- ▶ How well do your teammates know your product? Where are there gaps in their knowledge? How are they staying current on product changes and updates?
- ▶ Do members of your team interact directly with customers? If so, do you have a strategy in place to train them on customer-facing interactions?
- ▶ Can members of your training team accurately check for understanding and evaluate whether customers understand the information?
- ▶ Is your team familiar with the content development plan and how you have outlined the who, when, where, and how the content should be delivered?
- ▶ Is everyone aligned on where and how to respond to customer questions and feedback?

Most importantly, you'll want to ensure you and your team are aligned on the ultimate goals of the customer education program. Ensure everyone understands how education will help your customers achieve success with your product, and why their success is critical to your business.

# 8

## Create the Content and the Experience

“Learners today are looking for dynamic learning experiences that are fun, practical, easy to consume, and help do their job. They want training that tells them why they should be doing something, not just how to do something.”

– Samma Hafeez  
Customer Success Leader

You've done a lot of thinking and planning in steps 1-7. Now, it's time to roll up your sleeves and get to the fun job of creating awesome learning experiences you know your customers are going to love.

There are 3 core areas of the step:

1. **Author the content**
2. **Build the experience**
3. **Test the content experience**

Let's break them down keeping in mind the goals and format you outlined in earlier steps:

1. Author the content
  - Determine the **instructional design** and organization of the content.
  - Draft the content and create accompanying visuals.

**⚠** Avoid internal language and confusing acronyms and ensure the content is concise and understandable to an outsider. If needed, translate the content into relevant languages for your learning personas.

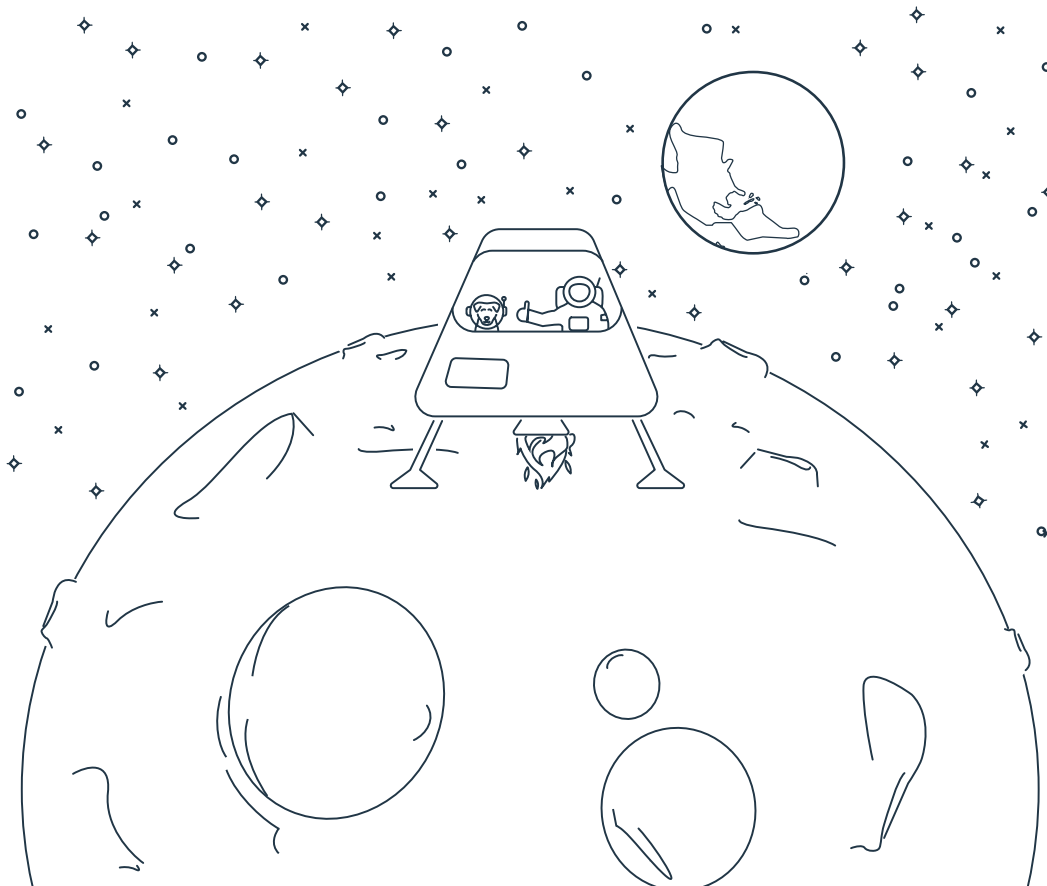
2. Build the experience
  - Identify where you want the content displayed (i.e. is it accessible from within your technology or a third-party tool as well).
  - Develop gamification opportunities to drive engagement.
  - Design the on-brand learner experience.
3. Test the experience and content
  - Ensure the flow of content works and you've avoided any internal terminology.
  - Validate your content strikes the balance between enough information without overwhelming.

Depending on your platform, you might need to consider questions like:

- ▶ What tools are needed to build the content?
- ▶ Where will the content be hosted?
- ▶ Who will do your translations and how will they get into the platform?

# 9

## Distribute the Content



You've created and tested this awesome content and experience. It's time to roll it out to the world. During this step, you really want to focus on your learning personas to ensure you're delivering the right content to the right audience at the right time within their journey.

There's probably a lot of information to teach, so you have to find the right balance between what your customers could know and what they need to know—otherwise, you risk losing their attention with irrelevant nuances. You might also consider the learner's "moment of need." What feels especially relevant to teach at that moment, and what content can be taught at a later time? It's easier to pinpoint the learning journey when you refer to the plan you laid out in steps 3-6.

During this step, consider the following:

- ▶ Will your content be gated through a sign-in wall or broadly available?
- ▶ How are you communicating to customers when new content is available?
- ▶ Once someone has completed a learning experience, how can you make it simple for them to know what's next or what else is available?
- ▶ Do you need to incorporate the content into other channels? For example, surface the content within your own product, or in a marketing campaign?
- ▶ What is your strategy for provisioning content to specific segments of your audience so that everything they're learning feels relevant?
- ▶ Are you pacing the content so that the topics feel contextually relevant for where the customer is in their journey?
- ▶ How will you address challenges with accessibility for people with disabilities?
- ▶ Have you considered distributing different content formats for learners who might have distinct preferences (a transcript that accompanies a video, for example)?

Once you distribute the content, it's time to start analyzing and iterating on it to keep the experience engaging and relevant to your audience.

# 10

## Assess the Success of the Education

“While the impulse is always going to be to continue to build, to add more, customer training needs to step back and think about a portfolio of content. When you do that, you see that some of the content needs to be retired.”

– Adam Avramescu

Head of Global Enterprise Customer Enablement & Training for Slack  
Founder of CELab (The Customer Education Lab) Podcast



Critical to evaluating a 'job well done' is assessing the job and evaluating the impact. With customer education, we look to assess not only the business impact, but also the individual impact on the customer.

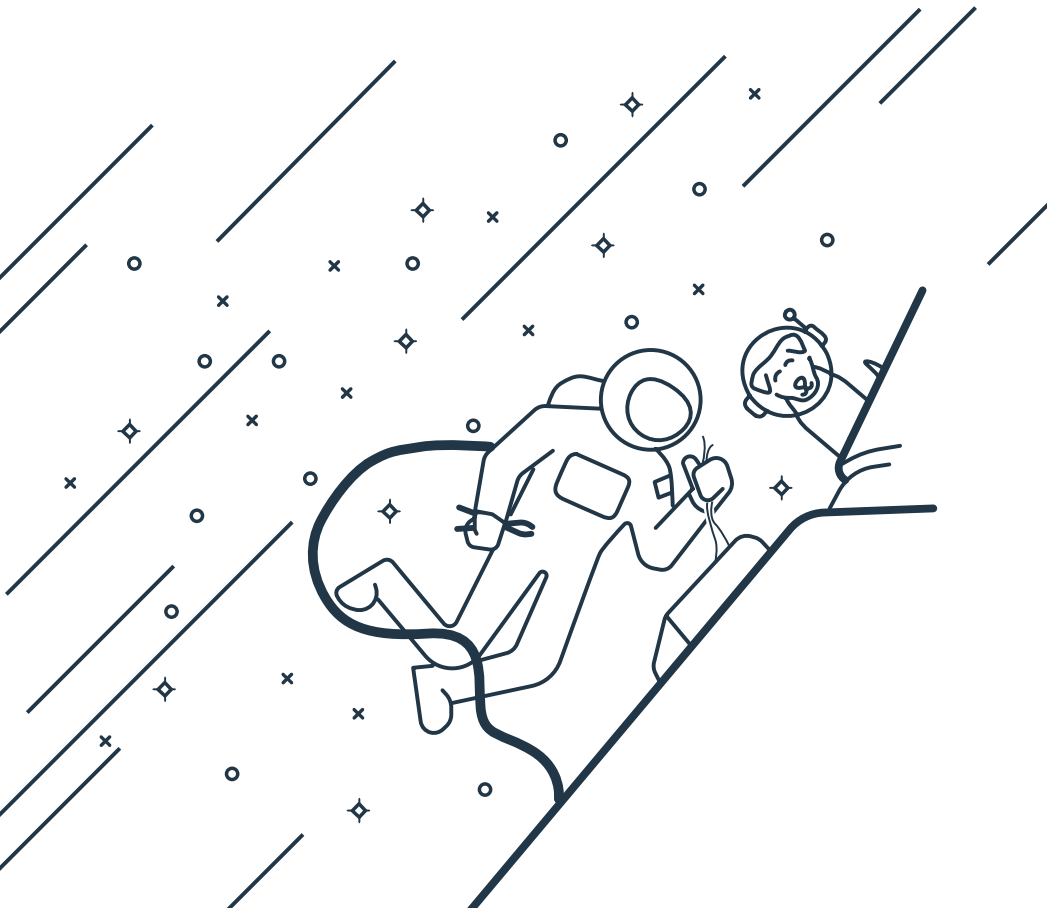
To assess the success of the education, you'll want to:

- Confirm your success metrics (outlined in step 2).
- Analyze the metrics using data from customers who participated in the education program.
- Compare the performance to your baseline metrics.
- Measure customer engagement with the content.
- Determine the completion rates of the education and how long it took to complete.
- Determine the degree to which the content was understood through assessments, simulations, and/or surveys. If possible, also measure how training has influenced the behavior of your customers in your product.

Once you've evaluated the success of your education, you're ready to identify how you can improve it.

# 11

## Improve the Education



It's often a challenge to balance improving your current learning experiences with creating new ones. For many of us, it's tempting to leave content alone once it's in the wild, and move on to something else.

The most successful customer education programs, however, have adopted a content cycle that continuously measures the success of the education and implements changes to iterate it. For example, they might have dashboards to continuously monitor content performance, or they might analyze qualitative feedback from Customer Satisfaction (CSAT) surveys to look for opportunities for improvement.

Remember, while the content you created last year might feel "old" to you, many of your customers are engaging with it for the first time today! To help you with your own process for improving content, we recommend starting in the following areas:

- Work with Support to identify common pain points or frequently asked questions and create content to address them.
- Ask Product if they can help you understand where there might be "consumption gaps." That is, which features in your product are your customers NOT using? Consider creating content to promote these features.
- Continuously update the education. This is not a one-and-done job, but a consistent process in your program. For example, you might hold regularly scheduled sessions with your team explicitly focused on content improvement.
- Learning should be in sync with product or industry updates. Being in lock-step with the broader organization helps you ensure the program fits the needs.
- Identify which content should be retired based on lack of engagement and/or value. Removing content can feel challenging because you put a lot of thought and work into it, but it's necessary to maintain an engaging online learning environment.
- Pivot and tweak to stay within budget and/or allow for an increase in budget. Have we mentioned monetization?

Focusing on these areas supports your effort to keep education engaging and relevant to your customers, and builds a stronger alignment with your business goals. Your customer education program also provides insights and opportunities to test ideas from your organization against the market (i.e. new technology or methodologies) before you invest the money and resources to develop them.

# 12

## Report on Customer Success and Revenue Metrics

“In our business, we’ve been able to draw a line between customer training, and customer usage of our platform. When increased usage ultimately decreases customer churn, that’s how we can say customer training is providing an opportunity for customers to be sticky with us.”

– Tom Studdert

Vice President of Learning & Development  
ZoomInfo Powered by DiscoverOrg

For many customer education professionals, establishing a causal relationship between training and revenue is “the holy grail.” However, short of running A/B experiments, it’s notoriously challenging to quantify the exact impact of customer education on your business. Nevertheless, it’s usually fairly simple to find correlations between customer education and revenue metrics. These correlations can go a very long way in helping you understand the relationship between your training programs and customer behavior.

To help you get started, we suggest the following:

- Create at least two cohorts of customers: Those who are “trained” and those who are “untrained.” You might also want to create additional cohorts to reflect a continuum of content engagement (e.g., a cohort who completed one course and a cohort who completed 2+ courses).
- Review the goals you set for your customer education program and the metrics you identified as key to achieving success.
- Now, analyze the data on these metrics to discover the “average” for each cohort. How does your “trained” cohort compare to your “untrained” cohort?

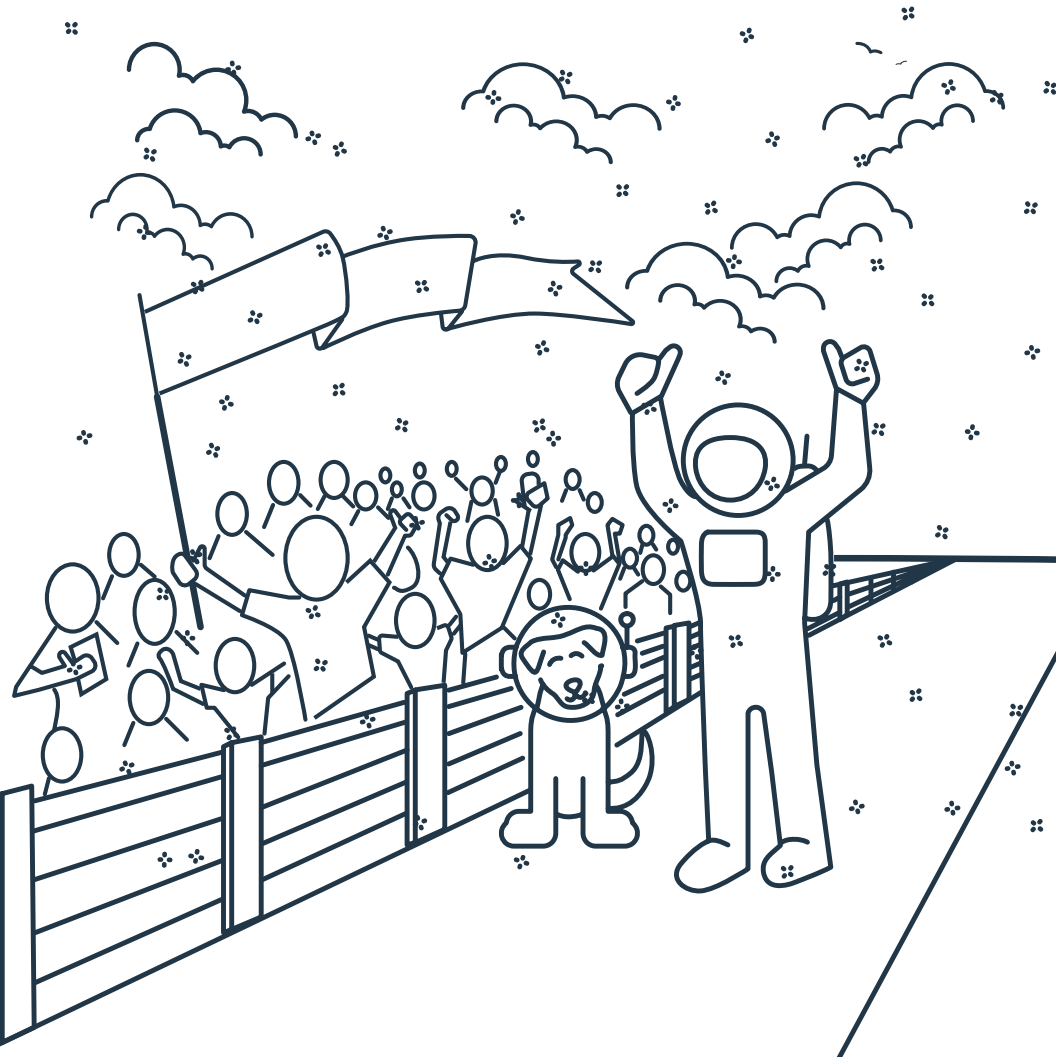
Depending on your business model, you might be looking at:

- Customer upsells and retention
- User activation rates and product adoption
- Customer support efficiency, or time to resolution (TTR) for support tickets
- NPS or another similar “customer satisfaction” score

As important as it is to report to your stakeholders the impact of education, you also must report back to your customers. This serves as motivation for them to continue engaging with your program because it validates that by doing so, they are gaining more value from your product and a higher return on their investment.

# One Small Step for your Customers, One Giant Leap for your Business

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This playbook is the start to communal knowledge sharing of experiences and best practices. Now that you know the basics of each step, you can start putting them into practice within your business.

We designed this methodology to be iterative and referential. We recommend that you revisit these steps regularly to confirm that you're still meeting the expectations from your organization, and from your customers. At the end of the day, customers are dynamic humans whose goals change, and your customer education program needs to adapt and serve as a catalyst in those changes. By clearly understanding your learners, you truly will build a program that is ever-relevant to the evolving world.

Put this into action, realize your training program's true potential, and share with the community lessons learned.

“Companies with resilient, future-ready business models positioned to ride these trends have pulled further away from their industry peers, while those with legacy business models have, for the most part, fallen further behind.”

— McKinsey & Company

## APPENDIX

Thought Industries followed a comprehensive methodology to develop, test, and validate each step within the Customer Education Playbook. This included surveying nearly 200 people across Training, Customer Success, Customer Support, and Sales/Marketing roles within B2B companies. Thought Industries continues to survey and validate the methodology to ensure it remains accurate to the job: Educate Customers to Achieve Success.

This Playbook is just the beginning of a series of content that will continue building upon the narrative in collaboration with you, thought leaders, and other key stakeholders in customer education. Together we're building the methodology that paves the way for continued growth through customer education.

We're developing additional collateral to help you execute each step within your own program.



**Interested in sharing your  
feedback on the steps?**

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Contact our [marketing team](#)  
and share your feedback!



**Need a platform to scale your  
customer education needs?**

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Let's [connect you with an expert](#)  
on our team to see if we're a  
good fit together.

### About Thought Industries

Thought Industries provides the world's #1 software platform for customer learning management (CLM). CLM empowers businesses to create compelling learning experiences for customers, partners and professionals. These experiences help businesses grow revenue, increase customer loyalty, and ensure customer success across technology, manufacturing, healthcare and other industries with complex products and training requirements. Thought Industries was founded in 2014 around the core belief that online learning experiences should be modern, intuitive, engaging, and scalable. Headquartered in Boston, Thought Industries has offices across North America and Europe.

[thoughtindustries.com](https://thoughtindustries.com)

