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DOING MORE WITH LESS

for Customer Success Leaders who want to expand your network and share actionable ideas

SUMMARY

GAIN GROW RETAIN

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Customer Education Maturity Phases
April 27, 2023

A strong customer education program has huge impact on the customer experience, but it isn't created all at once. There are phases that the program goes through as it develops, and change management becomes a critical component.

Each of these four stages build on each other, strengthening the educational experience you are able to bring to your customer. The first two do not require any technology and rely heavily on the CSM. The biggest change is the quality and consistency of the curriculum, allowing your program to meet the needs of your customers in a repeatable way.

The last two bring a digital component, allowing for more asynchronous training and freeing up the CSM to provide strategic insights and support where needed. There is also accountability through the addition of a project owner.

TRADITIONAL		DIGITAL	
Chaotic	**Developing**	**Scaling**	**Strategic**
• CS team reacting to customer training requests	• Repeatable curriculum	• Customer Edu Leader	• Digital academy supporting the whole customer journey
• No Edu leader	• Manually administered by CSMs or training specialists	• Digital academy but haven't centralized all training on it	• Learning data tied to CRM and Customer Success Platforms
• No curriculum	• Basic attendance tracking	• Reduced training dependency on CS team	
• No tracking		• Learning Engagement Analytics	

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Questions Discussed

- Who owns customer education at your org, and what challenges can this create?
- What challenges are you currently facing in your customer ed program?
- Any goals/changes you are planning to make this year?

Key Insights

The Value

Building a program that helps the customer take ownership of their learning not only provides on-demand learning but removes your CSM from the role of 'information feeder' and frees them up to focus on meeting needs in a strategic way. It is important that the content is clear and easily accessible to make this transition.

Change management also plays a role here as you work to make sure your CSMs are directing customers to the learning material and not continuing to play the role of a 1:1 trainer. Show them the value of freeing up their time to move into the role of 'partner' rather than support.

Moving into the digital realm, your training can become more purposeful. While the customer can move into modules as needed, you can also trigger training and learning opportunities before they realize they need it.

The Ownership and Challenges

There are a wealth of potential ed program owners depending on the maturity of the company.

Early Stage

It isn't always clear who owns the ed program. For some, it is dependent on whether the training is internal or external, and the owners here are often product, support, marketing, and sales.

Challenges here are a lack of communication and education plans and the unclarity of ownership can create confusion and lack of consistency.

Planned but Manual

It is clearer as to who owns the program, with the Success team taking a more active role in execution and often content development.

Without centralized training, the CS team spends a lot of time hand-holding customers with low ROI for customers. Adoption tends to be relatively low and preparation requirements are high, preventing CSMs from moving into the strategic role they need to be playing.

Robust Program

There is often a Learning & Development team that takes responsibility for developing content, making it available, and ensuring quality. This content is often much more robust, including a pathway for success.

It can be challenging to get internal buy-in and engagement, so creating a competition or points system for contributions that demonstrate desired behaviors can be valuable.

Use certification levels in your training that can be shared on social media. Create advocates and spread awareness about the value your product brings to the table in an organic fashion.

The Content

Your content must not only be engaging and easy to find, but it also needs to meet the actual needs of your customers at all stages of their journey.

Quality is much more important that quantity at this stage – spend the time getting it right and making sure each piece moves the customer to the next milestone.

Program Challenges

Regardless of the maturity stage, most found that programs were very time intensive for teams. There is also the problem of change management for customers. It is a process to help them understand the value of these programs and the impact of not prioritizing them.

In early-stage programs, organization can be a problem, creating extra stress and work to locate the appropriate training piece at the right time in the customer journey. A lack of program analytics makes it difficult to show the value of the program and identify potential churn risks for customers who are not moving into adoption through education.

Constant product iteration can quickly make the content you have outdated. Some felt that the needs were quickly outstripping the resources.

As companies more into more mature stages of customer education, the problems move into timing and need. When should new resources be introduced? Should training be a revenue stream rather than a part of the purchase?

Future Plans

A common theme was the need to automate as much as possible while continuing to build valuable content for the program. This was the case regardless of the maturity stage. Some later stage groups are looking at hiring staff, working to use the education process to build customer advocates, and starting the training even before the purchase is complete with an eye towards increased adoption and thus increased retention rates.

Resources

Podcasts
Customer Education in the Software Space
How to keep customers engaged during enablement and education

Discussions
Long Term Customer Engagement & Education
LMS for Client Onboarding
Training and Enablement for Enterprise Customers
Client-Facing Education

Articles

[Business Case for Digital Customer Education](#)

Training Video Creation

[Loom](#)
[Vidyard](#)
[Camtasia](#)
[iorad](#)
[mmhmm](#)
[Warmly](#)
[Davinci Resolve](#)
[WeVideo](#)