Customer Education Program Checklist

Customer Company Name: ____________________

Customer Point of Contact: ____________________

Program Starting Date: ____________________

STEP #1

Set Program and Business Goals

- [ ] Set business metrics (e.g., CLTV, customer retention, revenue, etc.).
- [ ] Set program metrics (e.g., time-to-value, NPS, reduce support tickets, etc.).
- [ ] Communicate goals and secure leadership buy-in.
- [ ] Create “learner personas” and understand learning needs.
- [ ] Select content medium(s) and delivery method(s).
- [ ] Determine ongoing support needs and set expectations.
- [ ] Agree on a feedback loop.
- [ ] Set an implementation timeline.

STEP #2

Create (or Update) Relevant Content

- [ ] Perform a content audit to determine needs.
- [ ] Meet with subject matter experts (SMEs) to update existing content or outline new content.
- [ ] Start creating or updating content with designers.
- [ ] Take content through multiple iterations to ensure accuracy and impact.

STEP #3

Prepare to Launch

- [ ] Communicate the program’s launch date with the entire company, including leadership.
- [ ] Onboard customers (if applicable).
- [ ] Launch!

STEP #4

Measure With a Microscope

- [ ] Measure business and program KPIs.
- [ ] Look at learning paths, courses and other elements to determine learning impact (or lack thereof).
- [ ] Source feedback from customers.
- [ ] Gather insights and discuss with internal teams.
- [ ] Game plan for next steps based on the insights and update goals/KPIs.

STEP #5

Evolve

- [ ] Make necessary adjustments.
- [ ] Return to steps #3, #4 and #5.

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