

Customer Education Program Checklist

Customer Company Name: _____

Customer Point of Contact: _____

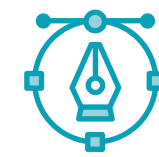
Program Starting Date: _____



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

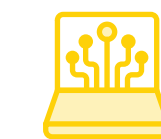
- Communicate the program’s launch date with the entire company, including leadership.
- Onboard customers (if applicable).
- Launch!



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.