



The 5 Point Checklist to Kickstart Your Customer Education Program

Best practices to onboard new customers and keep users up-to-date.

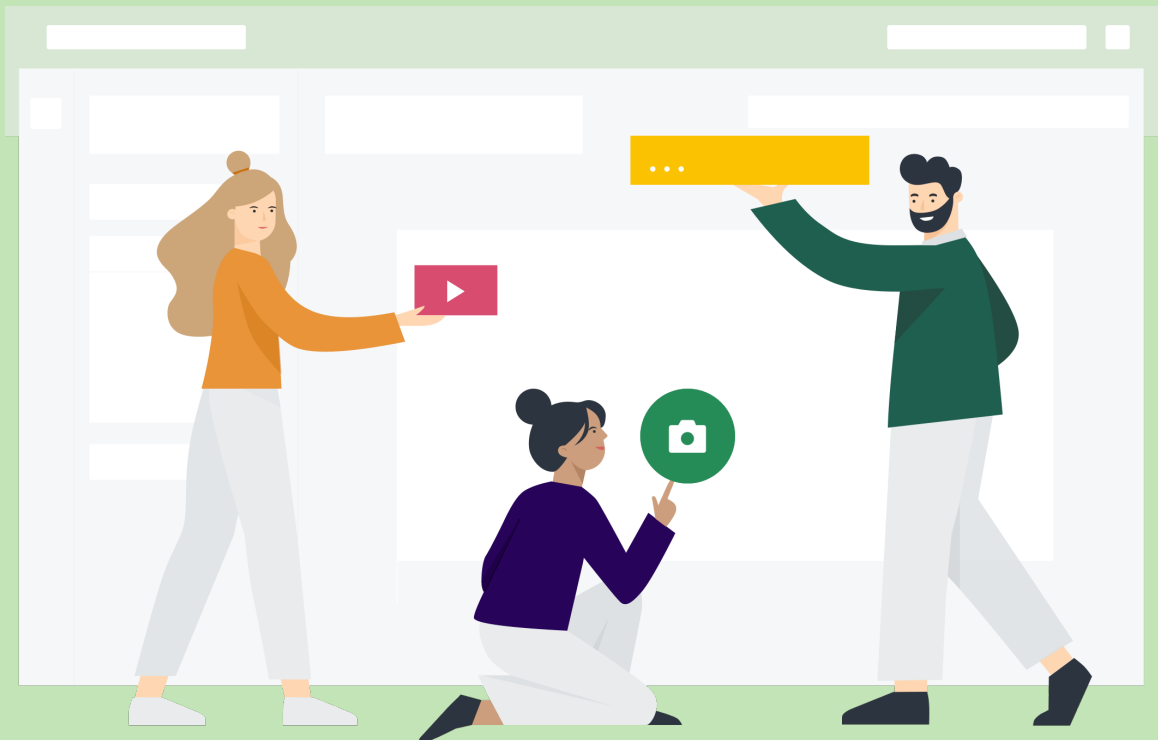


Table of Contents

Pg 3. An Introduction to This Checklist

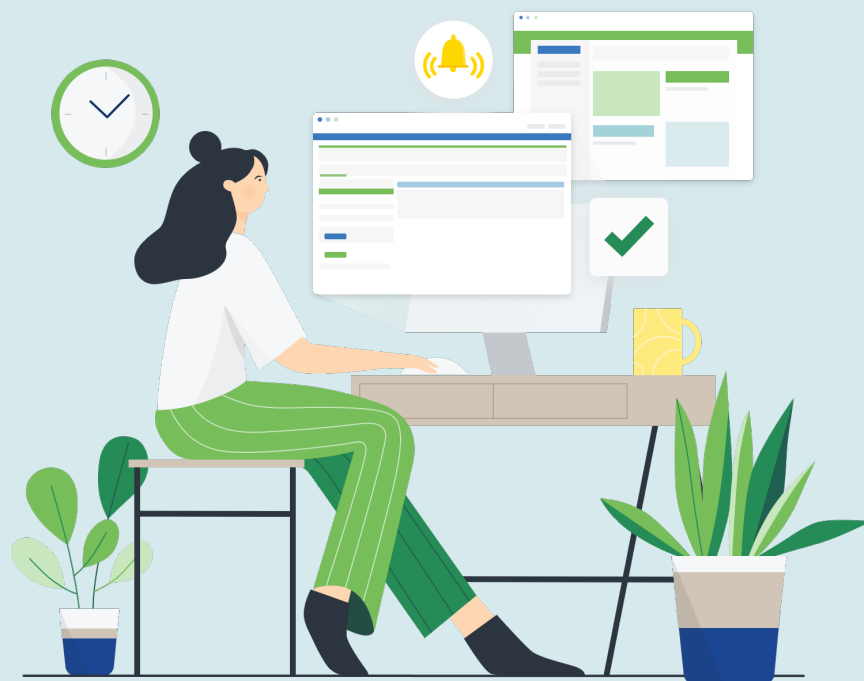
Pg 5. Understand the Costs and Tradeoffs

Pg 7. Determine the Program Scope and Implementation Strategy

Pg 9. Establish Clear Metrics

Pg 12. Form Your Team, Define Roles and Set Realistic Timeframes

Pg 14. Choose a Strategic Partner



An Introduction to This Checklist

People today are used to moving at their own pace and on their own terms. Consider this the “new normal.”

For your customer education program — and company — to succeed, you need to meet your learners when and where they want to hear from you. Today, people are learning online, on-demand and increasingly using a mobile device. Have you adjusted to these all-new requirements?

According to the Research Institute of America, online training [improves retention rates by up to 60 percent](#) over traditional methods. The asynchronous nature of well-designed, online training programs enables users to access learning material when and where they are best able to focus on the learning process.

Another major benefit of online training is its scalability. Instead of repeatedly tying up your subject matter experts with in-person training sessions for a finite group of people, an advanced online customer education program allows you to build highly compelling digital learning experiences.



With a proper online learning program in place, you can drive product adoption, improve customer retention and, ultimately, help deliver a best-in-class customer experience. This document will help you check off the five critical items needed to establish your own program:

-
- 1 Understand the costs and tradeoffs
 - 2 Determine your program scope and implementation strategy
 - 3 Establish clear metrics
 - 4 Form your team, define roles and set a realistic timeline
 - 5 Choose a strategic partner

“

With a proper online learning program in place, you can drive product adoption, improve customer retention and, ultimately, help deliver a best-in-class customer experience.



Understand the Costs and Tradeoffs

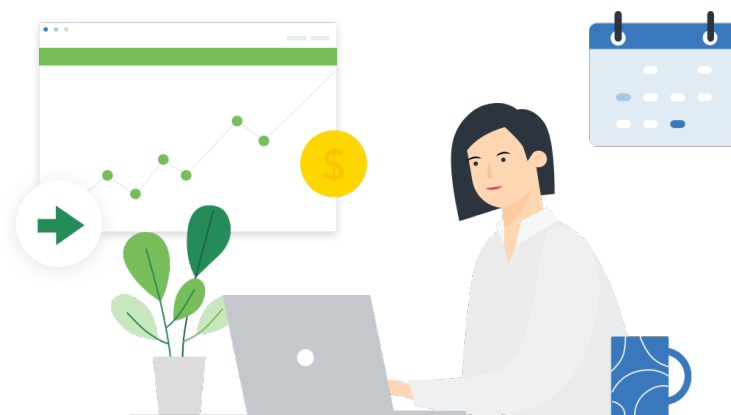
Begin by understanding the important costs and tradeoffs associated with various approaches. Consider, for instance, the unprecedented costs of operating an in-house system. Trying to launch and manage a comprehensive learning program using a hodgepodge of spreadsheets, disparate file formats, separate databases and suboptimal authoring tools is a recipe for disaster.

When content is not delivered seamlessly, users — especially customers — will disengage and lose interest. And when your tools and processes are limited in their ability to scale, your learning program will inhibit your businesses' growth. Without establishing the proper foundation, the time and energy you sink into building your program will result in waste.

Another aspect to consider is the cost of maintaining and expanding your online learning programs. Once you've made the upfront investment in a customer education program — regardless if you're investing time, money or both — you need to protect your investment. You want to avoid the deployment process stalling out, and you don't want a program that requires constant tweaks as it scales alongside your business.



If your tools and processes can't scale, your learning program will inhibit your businesses' growth.



Content is another critical component of a learning program that can impose significant costs, and become a significant bottleneck, when poorly planned or designed. The tools and processes you use to create and store content will have inherent limitations. Your goal is to aim for a system that enables agile maintenance and empowers you to scale for growth.

Your program is only as good as the content it's built around.

Finally, perhaps the biggest cost to consider is the risk of your customer education program failing to engage learners. In order to gain customer buy-in and effectively promote knowledge building, the end-user environment must be intuitive, engaging and easy-to-use. Aim to make their journey as frictionless as possible. Do this by providing a consistent interface and by having seamlessly integrated learning experiences. Learning needs to be fun – It should feel like an adventure, not a chore.



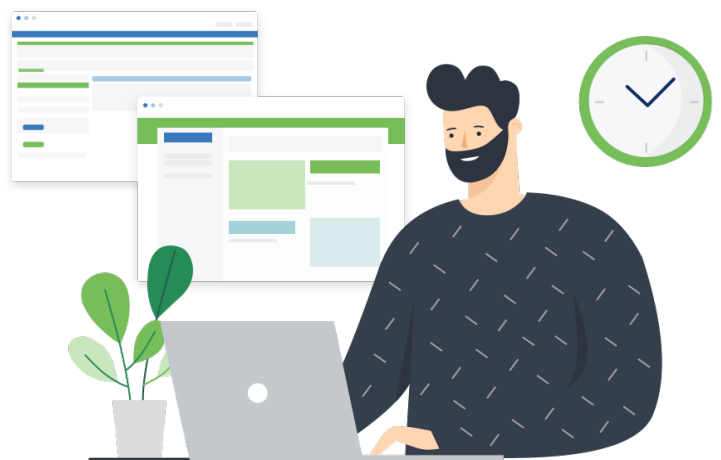
Determine Your Program Scope and Implementation Strategy

As is the case with any new program implementation, it's important to establish clear goals at the outset. Your customer education program is no different. It requires a purpose and well-defined outcomes. In our experience, the number one reason learning programs fail is that they fail to deliver tangible results. By focusing on outcomes from the beginning, you'll have a north star to guide your efforts and the ability to prove return on investment (ROI).

You'll also need to consider stakeholders throughout the business. We're talking about people beyond those who are directly involved in the creation and deployment of training. For example, instituting a new [customer onboarding](#) program directly involves product managers and customer service, but it also has implications for sales, operations, product development and finance. All of these orgs need to be brought together to drive success.

“

By focusing on outcomes from the beginning, you'll have a north star to guide your efforts and the ability to prove return on investment (ROI).



For companies with diverse product families, consider the importance of maintaining brand consistency across your training initiative. Launching an online learning program represents a major factor in your overall branding and customer-facing strategies. As with any program, you want to leverage this opportunity to reinforce corporate imagery and messaging. It is a best practice for your learning program to have cohesion that aligns with the larger corporate narrative and brand.

Once you have determined your program's goals, scope and objectives, as well as the organization-wide stakeholders, it's time to begin implementation. Depending on your internal bandwidth and experience, this can be handled in-house or through a third party. Regardless, it's important to designate an in-house coordinator to work with both internal and external teams to keep the project on track and resolve any issues that may arise.



Establish Clear Metrics

If your team is going to invest time and effort to design and deploy a customer education program, it's essential to establish key performance indicators (KPIs) in order to measure success and, ultimately, deliver a positive ROI.

Not all learning platforms connect to your internal systems or allow the tracking of metrics needed to [measure the effectiveness](#) of a learning program. In fact, not all the metrics you may need can be measured through learning analytics alone. In order to know how users are doing, during and after a course, successful program managers sometimes have to think outside of the box.

So, what should you track? Below are some examples.



What to track: Product adoption

How to track it: Sync learning data with product data

Why you should care: For Software-as-a-Service (SaaS) companies, few metrics shed light on the health of your business than product adoption rates. To determine how your customer education program is impacting product adoption, you'll need to map your learning data against your product data. Look at the difference in product adoption rates among learner-users compared to standard users.



What to track: Customer retention

How to track it: Sync learning data with customer data

Why you should care: It's no secret that knowledge is a key component to success in any endeavor. Customers who are informed and highly proficient users of your product are more likely to achieve success, thereby increasing their loyalty. Sync your learning data with your customer data to determine whether your customer education program is driving customer retention.



What to track: Learner satisfaction

How to track it: Surveys

Why you should care: This is one of the most common assessments used in customer education courses. An electronic survey is distributed to customers who have completed a course and participants are asked to evaluate it. While it may seem like a hassle to ask your customers' opinion of your course, these surveys contain valuable information as you look for opportunities to improve your learning program.



What to track: Completion rates

How to track it: Your training platform's built-in analytics

Why you should care: Sometimes the best metric is the simplest one. Tracking completion rates and monitoring where learners "fall off" can provide qualitative data to complement survey data. Look for bottlenecks and "off ramps" where engagement is lost. As you adjust the course, you'll be able to see how those changes impact completion rates. If you want to dive deeper, look for the completed courses that have an impact on higher-level customer and product data.



What to track: Skills and knowledge

How to track it: A knowledge check at the beginning and/or end of the course

Why you should care: Assessments are a powerful tool for validating if information is being absorbed and gathering information about customers before/after they engage in learning programs. For example, LiveseySolar Practice Builders – a healthcare marketing organization in the U.K. which runs a course on telephone sales – tests its learners before and after the course with a series of mystery calls. These calls enable the organization to understand what skills their learners lack, as well as how effective their course was.

Tracking your customers' progress through a course is important, but these metrics are just the start. Every learning initiative is different and each organization needs to improve in different areas. Before you start tracking any metrics, think long and hard about your organization's strategic priorities. Then, make a list of your goals and the metrics you can tie to them.

Form Your Team, Define Roles and Set Realistic Timeframes

For a customer education program to succeed, it's important to involve stakeholders from across your organization. No two customer education programs are the same, so the ideal team will differ from business to business. On leaner teams, one person may wear multiple hats – or all of them.

Still, there are a few key roles all customer education programs should consider. We've outlined them below.



Customer Education Lead: It's this person's responsibility to get the customer education program off the ground and fully operational. They'll need to coordinate internal and external resources, assemble a cross-functional team, develop a technology stack and gain executive buy-in. This person may or may not have prior learning and development (L&D) experience. If you're reading this, there's a pretty good chance this is you.



Executive Sponsor: Never launch or operate a customer education program without an executive sponsor. This person should serve as a guide to ensure your program is fully aligned with the business' strategic priorities. This guidance is absolutely essential. The most successful learning programs drive results that are discussed in executive meetings and board presentations.



Subject Matter Expert: Every customer education program is built to communicate information. Your team's subject matter expert is the one with all the knowledge you're trying to enable your customers with. This person is the brains behind all of your content. The subject matter expert must identify all of the information your program needs to encompass.



Instructional Designer: If the subject matter expert is the brains behind content, the instructional designer is the person that helps make it real. This individual knows how to deliver information in a way that will keep learners engaged. They translate the concepts identified by your subject matter expert into content and courses that will enable your customers to successfully learn.



Technical Lead: For many companies, especially those in the SaaS space, customer education has increasingly technical considerations. If you want to deliver a fully integrated learning experience, you'll need someone to handle the nuts and bolts. Some programs call for entire technical teams, including product owners, data engineers and developers.

Once you've got your team in place, you'll want to develop a timeline to launch. The amount of time required will depend on your specific goals, budget and resources' capacity. It will also be heavily influenced by the quality of the tools, platform and partners you select.

This plan should provide time for ideation, wireframing, prototyping, experimentation and optimization. Ideal plans initially launch with one or two courses, then learn from their target audience, and then optimize or expand their learning program going forward.

Choose a Strategic Partner

As you consider an external partner to help ensure the success of your customer education program, there are two key traits you should look for:



The Platform: A technology vendor should have a great product. Be sure to choose a platform that offers you the flexibility and scalability you need to make learning work at your company.

It should also be able to connect to your existing technology ecosystem – isolated learning environments underperform compared to fully integrated environments. Additionally, the platform needs to offer the features and infrastructure necessary to scale your customer education program over time as you add use cases and expand the program alongside your business' growth.



The Expertise: A true strategic partner will offer more than just technology. Find a partner that knows their craft. Not only should they be masters of instructional design – the art of translating complex information in learnable content – they must also be students of business. The best partners have worked with businesses like yours before and they know how to build a customer education program that drives tangible impact.

If you choose the right partner, the right platform and implement the right strategy, your efforts will promote adoption, retention and operational efficiency, while preserving the brand you've worked so hard to build.

Are you ready?

Let Northpass kickstart your learning program, today!



northpass