

# 4 Steps

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To Creating A Successful  
And Empowering Customer  
Education Program



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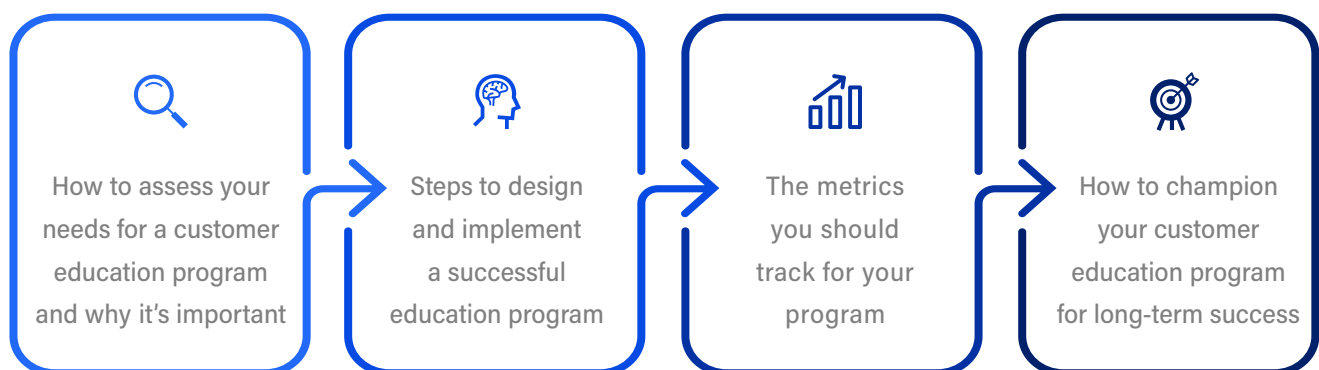
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# Onboard, Engage, And Retain

Customer education is the strategy designed to onboard, engage, and retain your new and existing customers. Sometimes, it's also referred to as customer training and it's designed to **help users of your product or service better understand and find value in your offering.**

Regardless of what industry you're in, customer education is already happening in your organization. This may be done 1:1 with a customer success team or through a training program designed to help your customers succeed.

In this guide, we'll help you build an effective business case to implement a successful customer education program while setting expectations with stakeholders. Specifically, you'll learn:



# Step 1

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## Assess Your Needs For A Customer Education Program And Why It Matters





# What is a customer education program?

Before you dive into the details of building your customer education program, it's necessary to understand

WHAT  
IS IT?



COMPANY  
NEEDS



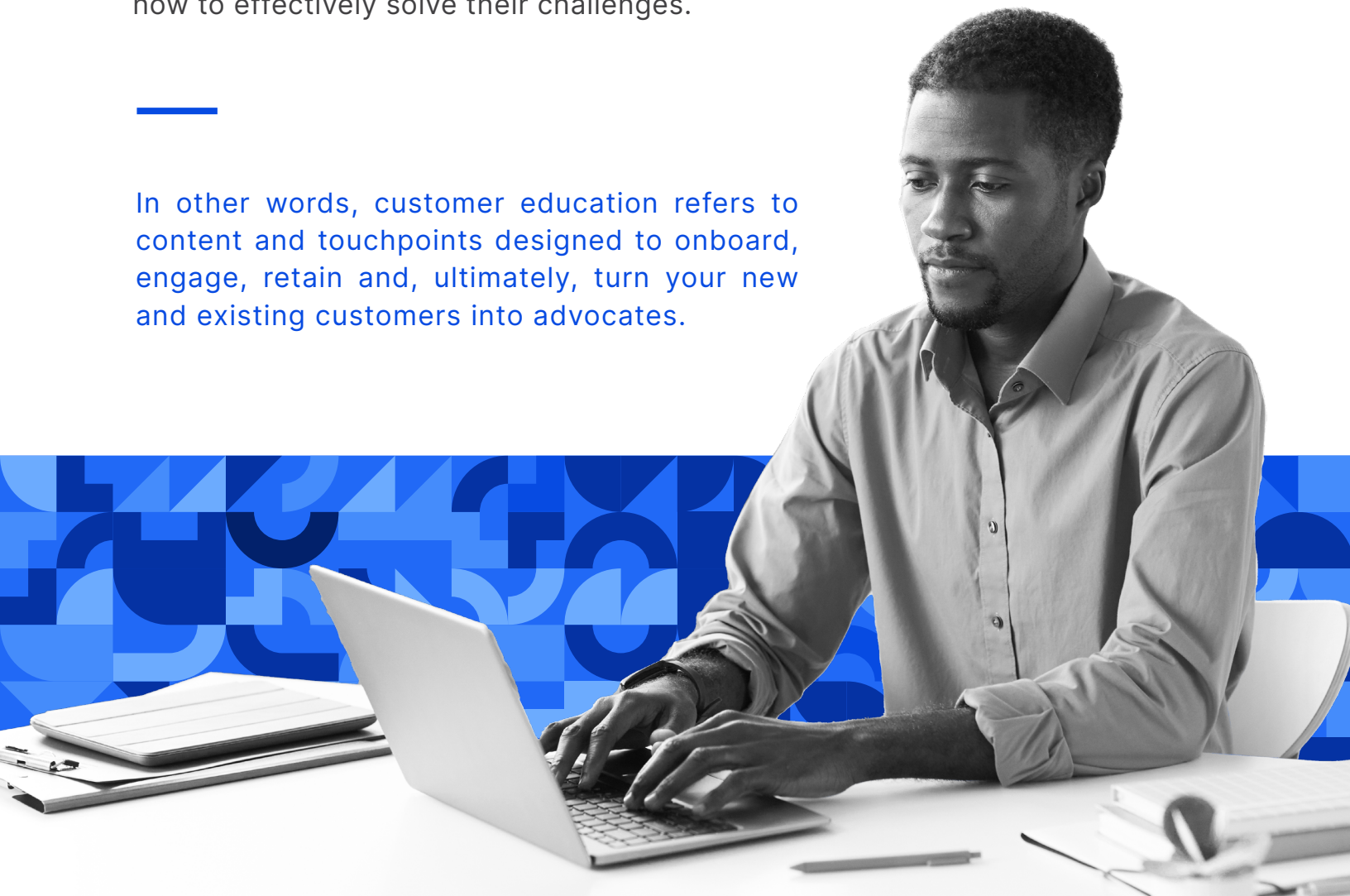
WHY IS IT  
ESSENTIAL?

Customer education is the information a company provides to teach customers how to use and find value in products and services — and it plays a key role in your overall business strategy.

Before a sale, you teach buyers about the market and how your product can help them solve their pain points. After the sale, you educate customers on maximizing their investment in your product or solution to make sure you're showing them how to effectively solve their challenges.

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In other words, customer education refers to content and touchpoints designed to onboard, engage, retain and, ultimately, turn your new and existing customers into advocates.





## Why is it important?

A successful customer education program can have a significant impact on long-term business goals — from increasing customer satisfaction scores and improving product/service adoption, to driving lead generation, scaling, and boosting revenue.

Companies of all sizes need effective customer education, especially when they start to experience increased growth. As the company grows, you may need to move away from 1:1 trainings and start thinking about leveraging the technology you'll need to implement a program and customer education engagement at scale. Why? Because the easier it is for customers to understand your offering, the more likely they are to engage and quickly realize the potential gains and benefits it brings to them.

With that in mind, you'll want to create a program that evolves over time and is easy to deliver. As you expand, consider the value of building a portfolio that includes an online academy, a help center, videos and webinars, in-product education sessions, certifications, and more.



## When is it the right time to start investing in a formal customer education program?

Whether you're seeking executive buy-in and resources to create a new program or looking to expand your current customer education offerings, there are some relevant things to consider. To help you make the best decision for your company, we've listed [3 signs that indicate it's time to start investing](#):

### + **Rapid Company Growth**

Your growth rate is an important metric for allocating your resources. If your business is growing with a healthy number of new customers in addition to existing ones, you may be having difficulties keeping up with customer onboarding and servicing. This is a good indicator that you need to start looking for a solution that will allow your training to scale along with the business.

### + **Rate of Product Innovation**

Rapid software delivery is a good problem to have, but it also means that customers may not be able to keep up with all the new features and functionalities that come out. And while being able to allocate several hours to provide personalized learning experiences would be ideal, training customers 1:1 is not feasible for every business or team. Consider the rate of product innovation and how that may affect your ability to train customers.

### + **Learning Investments**

Invest in your customers, and they will invest in you. You may have invested in training for other areas of the organization (onboarding employees or upskilling with career development), and customers deserve the same love! Your business relies on strengthening long-term relationships with your customers, so it's important to offer an inviting experience. This includes an easy way to communicate and an efficient system to address their questions. As companies integrate new software into their operations, you can stay ahead of the pack and offer more value than your competitors by having the right resources to accelerate learning.

Now that you've learned to recognize these indicators, you're probably wondering what the benefits of a customer education program are. Let's look at [what companies gain by investing more in customer education](#).

# Benefits Of Customer Education

Providing a strong customer training program offers many benefits to your organization:



## Increasing Revenue And Decreasing Costs

Great customer training can lead to increased revenue. The cost of acquiring a new customer is **5 to 25 times** higher than retaining and growing an existing one. The value provided by customer training can contribute to a more positive customer experience, increased loyalty, and retention —boosting revenue.



## Increasing Engagement With Your Product/Service

When customers understand the value of a product or service, they are more likely to engage with it and become potential advocates, internally and externally. Education programs can ramp up your customers quickly so they become aware of product releases, best practices, and the benefits and impact your company brings to them.



## Increasing Time To Value And ROI

The faster a solution solves a problem, the better the customer experience. When it comes to technology, customers are looking for a quick return on investment Time To Value (TTV), so consider this when evaluating your approach. The value created by a product or service is proof that it works. Fast TTV fulfills the promises made in your sales pitch. When you deliver value time and time again, you build trust with your customers—making them more likely to become your brand advocates.



## Strengthening Customer Retention And Creating Upsell Opportunities

Around **46%** of businesses invest in customer experience, and that number is growing. If you want your customers to have a positive experience, you need to invest in it. Having a customer education program helps you build relationships over time by maintaining ongoing interaction with your customers. A training program will pay off at renewal or upsell because it won't be the first time they hear from your team. By then, they'll have realized the benefit of your offerings in their ongoing success—allowing the sales team to leverage this opportunity and giving your business a chance to increase the overall lifetime value of customers.



## Reducing Customer Support Costs

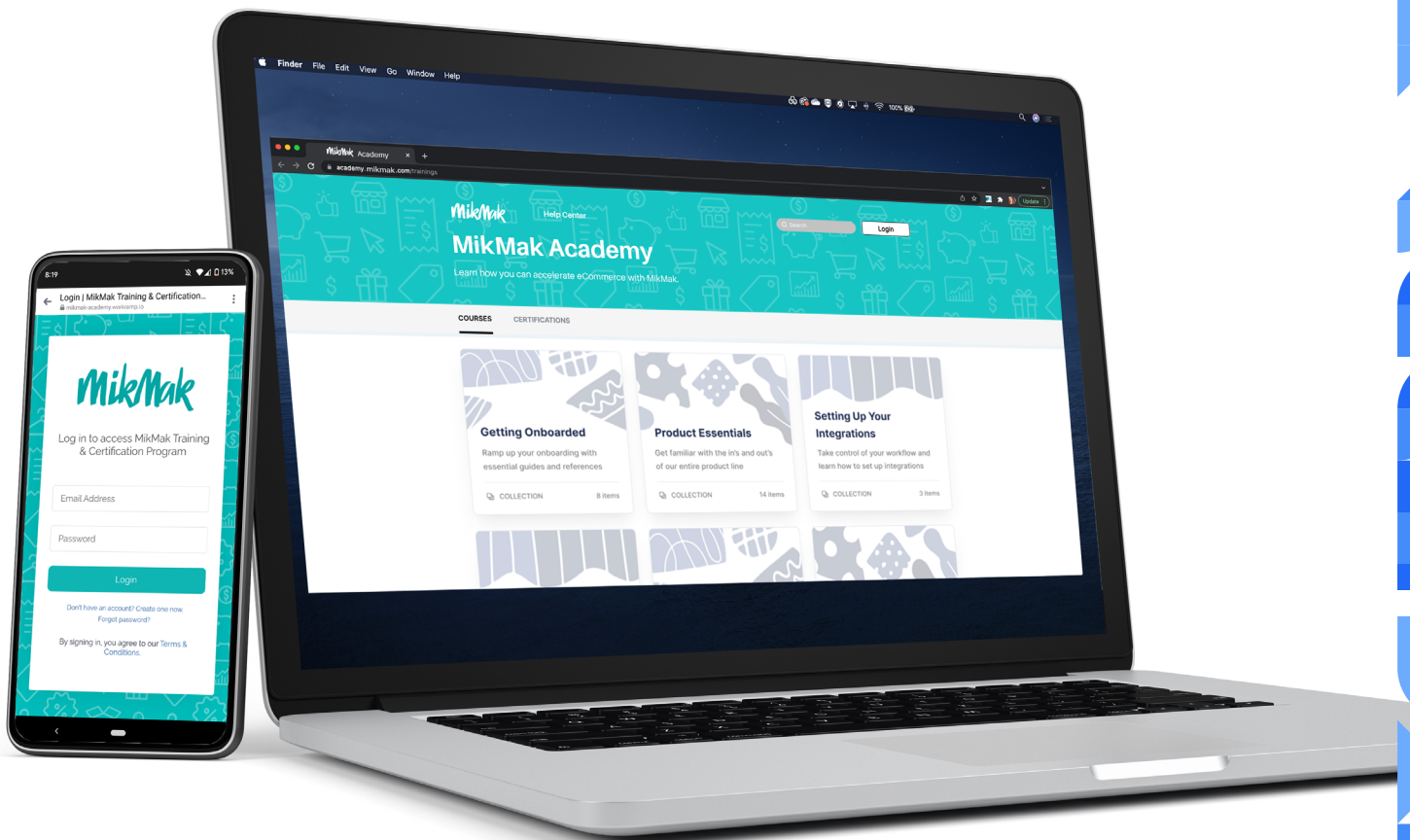
Without a customer training program, all inquiries that come after a company purchases, from onboarding to ongoing usage of your product or service, may overwhelm your customer support staff, especially as you scale. Customer training helps you ease the burden to your team while facilitating the process for your customers. Remember that they expect an easy and efficient onboarding experience, so well-organized customer onboarding programs that are scalable and help new clients quickly get up to speed will reduce your costs and improve their experience.

# Why **MikMak** Invests In Customer Training

“ We’re really looking to increase retention and renewals, to maximize the value of our customers over time.

By encouraging customers to become MikMak certified with WorkRamp, we’re helping them get maximum value from their investment, building brand equity within our buying centers and inspiring customer loyalty. ”

— **Sabena Carim**, Director of Effectiveness and Enablement at MikMak

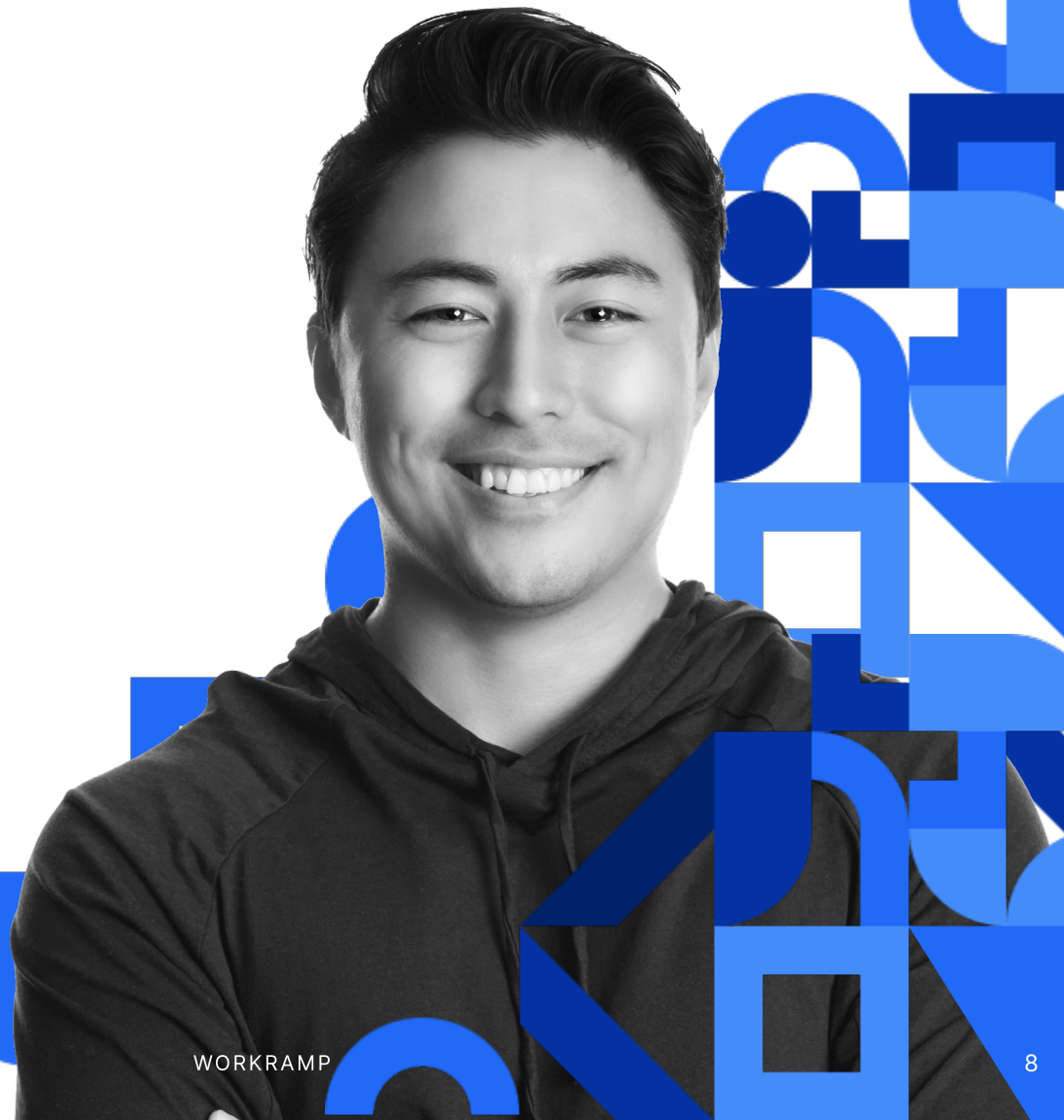




# Step 2

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## Steps To Design And Implement A Successful Education Program



Now that we've established the benefits of customer training, let's talk about how to implement your own.

## 01 **Assess your unique customer onboarding needs**

Have you heard the phrase “read the room”? When thinking about what type of content you'll create, the key is to know your customers. Companies often create training material that is difficult to understand or consume. Consider who your customers are, what content will make them more effective at their job, and how to deliver content engagingly and effectively. You'll need to know the audience you're targeting so that your customer training program sticks to the point and serves its purpose.

### **Interview your customers for decision-making**

Make decisions by planning and executing effective customer interviews. These interviews don't have to be formal, scary, or very long. They're just an opportunity for you to get a glimpse into how your customers interact with your product and brand. It's also a great way to discover and understand the customers' pain points. You can use these interviews to understand the biggest gaps they have in onboarding with your product, the best practices they are most interested in learning, and other insights. Though it may seem like a lot of work to get started, once you have and establish a formula that works, you can use it again and again.





## Identify who interacts with customers and when

## Establish the North Star goal of the program

- Is it improving product adoption rates?
- Improving customer satisfaction scores?
- Improving time-to-value? Improving net retention or renewals?



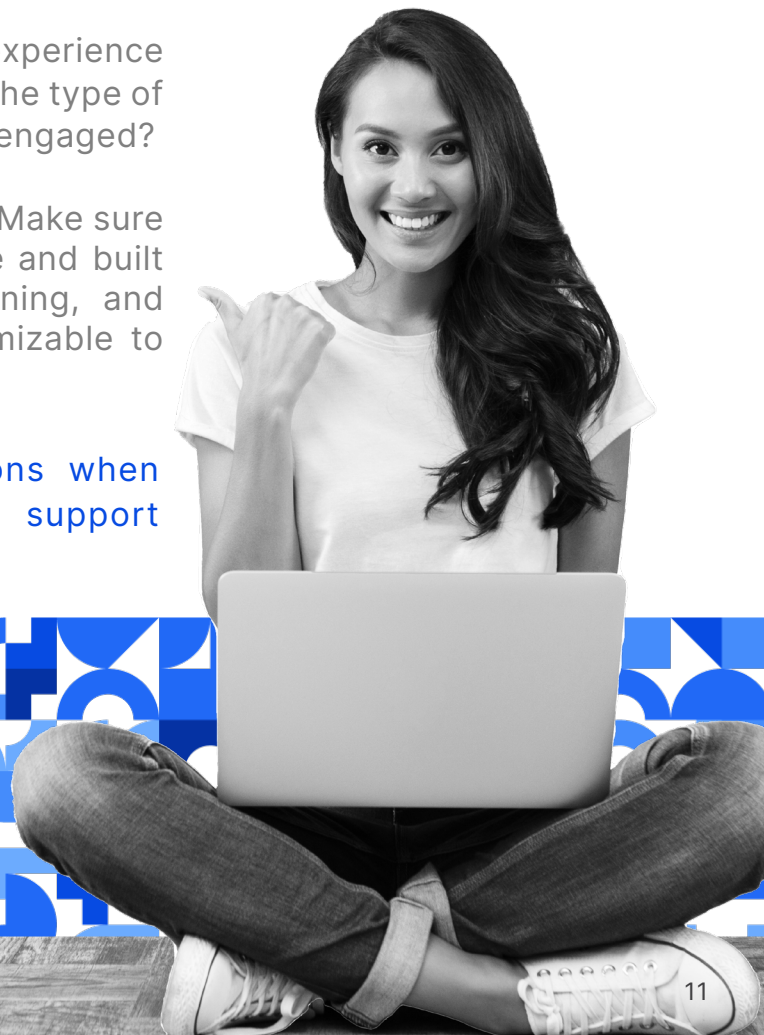
# 03

## Consider the technology you need to make your program successful

Picking the right technology to support your program will be key to success and scale. Consider some of these questions when determining which learning platform to invest in:

- + How quickly can you get your content up and running for customers? Days, weeks, months? Consider how long it takes to get the technology to be ready for customers as part of your purchase decision. Long implementation times can add weeks and months to your project.
- + Can it help you bring your brand to life/does the solution have branding capabilities? When looking at the benefits of the technology you're acquiring, consider whether it can help you position your brand and message.
- + What are the reporting capabilities of the platform? Does it integrate with your CRM, like Salesforce for more in-depth reporting? Is it built to serve different audiences within your customer base? For example, can it support one track for managers and one track for superusers?
- + Can you keep content organized and fresh? Since content will be so critical to your program, make sure you can easily manage content on the backend as part of your decision-making process.
- + Is it built to provide a positive learning experience for your customers? How will this impact the type of content you create? Will it keep learners engaged?
- + Is it built to scale with your organization? Make sure that the software you choose is scalable and built for you to create content, deliver training, and measure impact in a way that is customizable to meet your needs.

Think through each of these questions when considering different technologies to support your program.





# Why Customers Choose WorkRamp

The benefits of WorkRamp's All-in-One Platform  
for employee, partner, and customer education



"Workramp provides a singular, centralized platform that allows us to build training that can be deployed internally (for onboarding and employee training) and externally (for customer training, certification, and enablement – our "Branch University"). WorkRamp also has an amazing team that's very dedicated to taking care of their customers!"

— **Tim Chingos**, Sr. Director of Business Operations at Branch



"Enablement is in our DNA. At Quantum every employee is required to be product-certified—including our Finance, People, and Operations teams. Our passion is people. Our platform empowers everyone with a single version of the truth—data that is centered around the customer, their human stories. That's why when WorkRamp for customers became available, we were thrilled to bring our customers, partners, and all employees into one space, Quantum Metric University."

— **Chauncy Ford**, Director of Enablement at Quantum Metric

# Step 3

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Which Metrics Should You Track For Your Program?



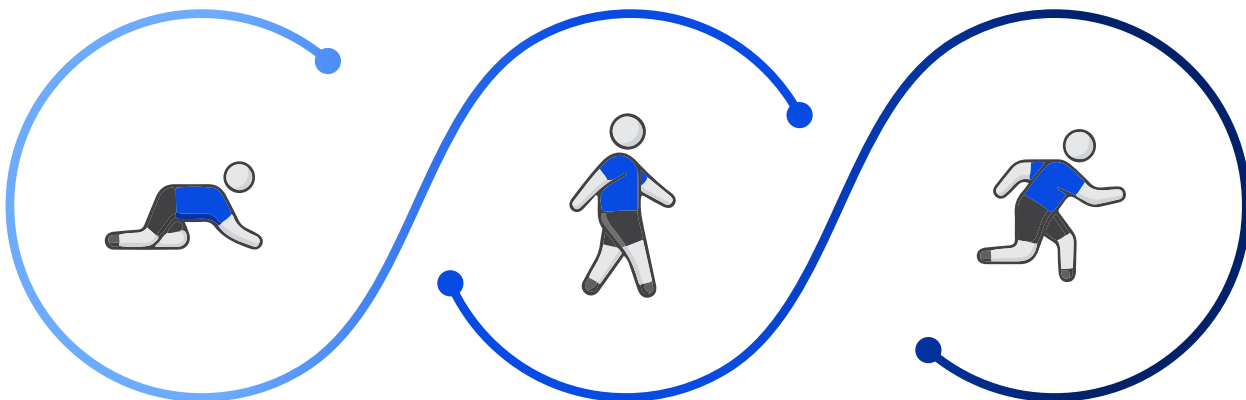
As you get your program up and running, there will be different metrics that will be important to track at various stages to prove the program impacts business results.

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**Spoiler alert:** You won't be able to tie improved retention rates or customer expansion back to the program during the first six months of launching. Getting to long-term business impact results takes time, but you can prove value fast and early.

So, how should you think about validating the value of the program?

Picture it as a “**crawl, walk, run**” approach.



## In the first 6 months of the program, it's all about getting customers engaged and understanding what's resonating with them.

- + How many customers register for your program as a percentage of total customers in your base? Which courses are your customers taking? And, how many courses per customer?

Keep in mind that the types of courses customers are taking can give you insight into any knowledge gaps or areas where they need more help. This can help you tailor your approach to fit their needs and prompt future engagement or lead to upsell opportunities.

- + Are customers satisfied with the content they're consuming?

In addition to the volume of courses taken by customers, satisfaction with the content is another great place to start measuring success. Ask customers to rate each course upon completion to get a sense of how useful the content is for your audience.

- + Are support tickets decreasing for customers engaged in your program?

As customers leverage your program to onboard, measure the volume of support tickets coming in from those accounts. Is it less than customers who didn't go through this onboarding experience? If so, that's a positive sign that your program is having an impact.



**CRAWL**

## **Months 6-12 is all about understanding shorter-term Key Performance Indicators (KPIs), which help you measure account health and customer happiness.**

### **+** What are the NPS scores telling you?

Tie NPS scores back to those engaged in the academy to show a high correlation to happier customers. You can aim to measure NPS at every touchpoint to move beyond legacy customer feedback collection and start conversations via more interactive mediums such as email, SMS, chatbots, and personalized service—depending on your company's resources.

### **+** Has product adoption risen for customers who are engaged?

Engaged customers are happy customers—and they are far more willing to use your company's products or services repeatedly. They also respond to upselling and cross-selling most often, generate more revenue, and are more loyal and forgiving. Show your customers how to get the most out of your technology. Make sure you're measuring metrics such as the increase or decrease of daily/monthly active users using the platform, average time spent interacting with the product, and the percentage of users that are performing key actions for the first time. With this, you'll be able to calculate how engaged your customers are and open opportunities for them to provide valuable feedback about how your business can improve its offerings and the overall customer experience.



**WALK**

## Month 12 and beyond **show long-term business impact and customer lifetime value and retention.**

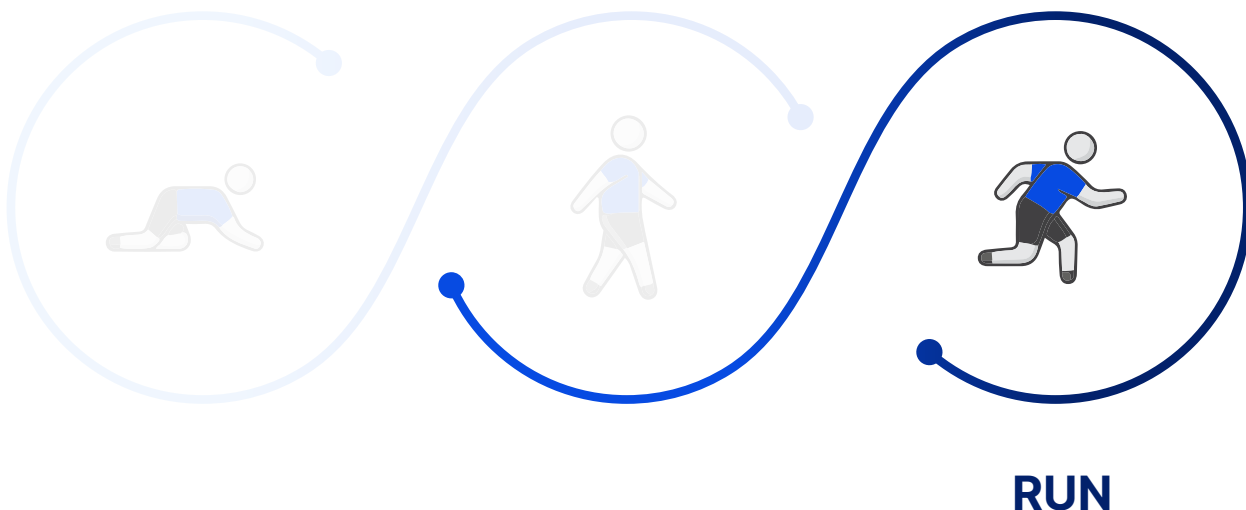
- + Do customers who have engaged in your program have higher retention rates? Have you seen higher upsell or cross-sell rates?

After a customer has engaged in the program for a longer period, you'll be able to tie retention and expansion rates back to engaged customers. If those who engage in your program have higher retention and expansion rates, you know you've hit a winning formula and you'll be able to show the program's ROI clearly.

- + Are customers advocates for your company brand?

The ideal state for any business is for customers to become long-standing partners and to be advocates for your brand. In the long-term, measure if the customers engaged in your program talk to others about their experience with your organization's product and customer service. You'll gain valuable insights into how you're performing.

Now that you know which metrics to track and when, let's look into the best way to champion an ongoing business case in front of executives and internal stakeholders so your program is set up for long-term success.







"I've seen a lot of LMS software in my day, and WorkRamp is by far the best: easy-to-use, great product, fantastic team, and scales for growing companies. Don't overthink your LMS vendor selection process. Just do yourself a favor and implement WorkRamp."

— **John Ley**, Director of GTM Enablement at Brex





# Step 4

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## Championing Your Customer Education Program For Long-Term Success

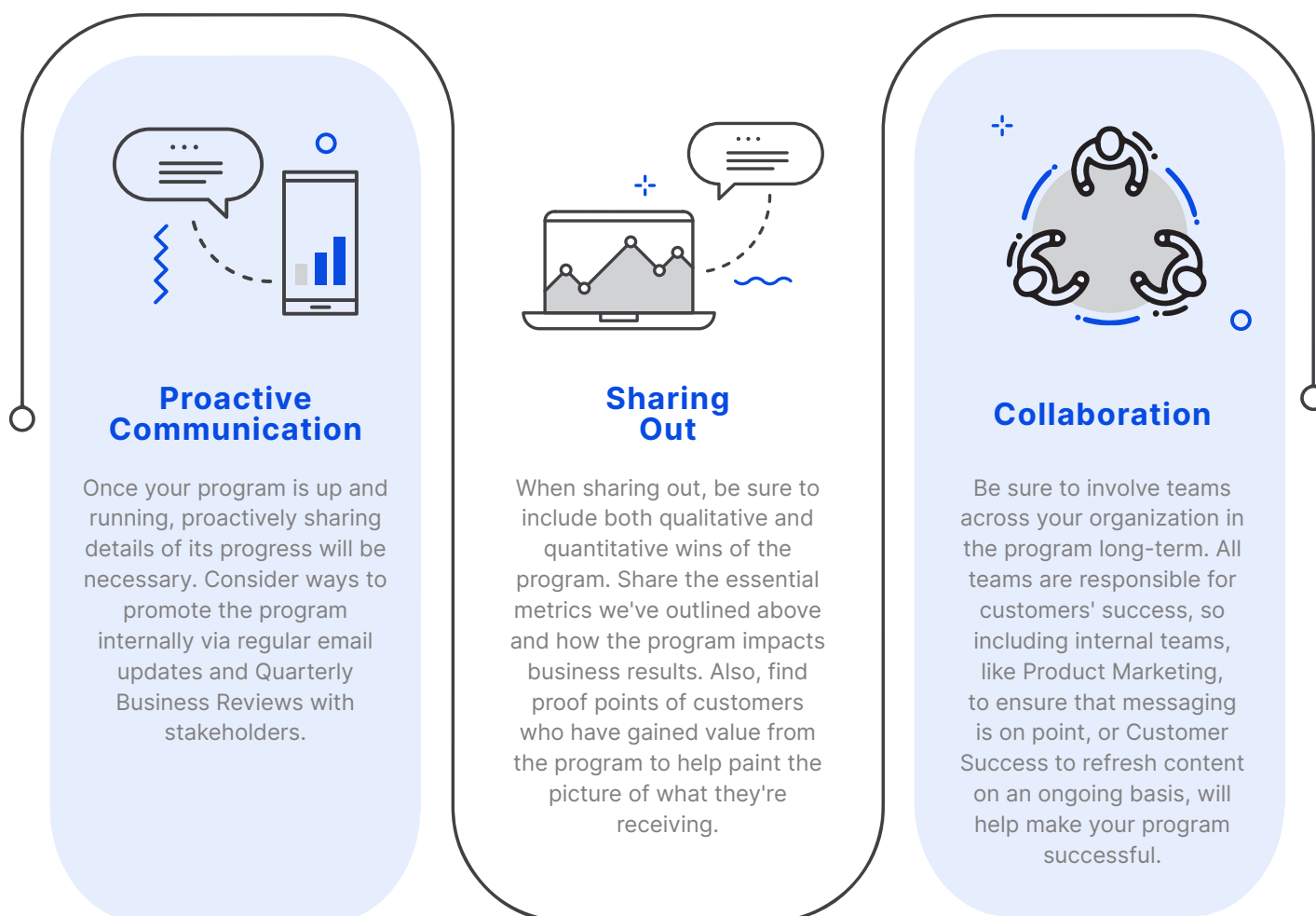


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To prove the value of the program, you need to show executives that different metrics will become measurable and available as the program evolves and progresses.

Showing that you can implement an effective education program from the ground up will give you the knowledge and notoriety needed to participate in impactful decisions that may affect the future of your company. This is the time to flex your strategic muscles and align to bigger business goals, which will undoubtedly accelerate your career.

Here is how you can take ownership and excel:



Developing an effective customer education strategy isn't easy. Once you've decided to implement one, opinions on the best approach will differ; internally, people will have ideas on how to go about it and, as with any wide-reaching strategy, there will be many moving parts. That's why you need to present a compelling case to executives and stakeholders that highlights the benefits and business impact of the program in a way that sets the right expectations from the beginning.

We hope this guide has given you insight into building an effective customer education program, what to expect long-term when assessing your company's needs, and the questions to ask when considering the type of technology you may need. Keep this in mind as you begin to discuss your program with decision-makers and stakeholders within your organization.

Remember that even as you highlight the potential for cost savings, the value of retention, and the benefits to your team, you may still encounter challenges when navigating internal discussions. Continue the conversation and equip yourself with the knowledge you need to have your answers ready.





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employees, and customers will love.

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