6 Principles to Building a Customer Education Program
Your Hosts

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Who are we?

We’re two education leaders who had parallel journeys at software companies.

We created the CELab (Customer Education Laboratories) podcast to connect with other Customer Educators, share best practices, and “find the others”.

We emerged largely from Customer Success, but have been charged with helping fast-moving companies stand up their educational programs.

We’ve been lucky enough to see and hear what people are doing in the market and how it’s changing.
20 years ago, you may have purchased this book.
1 million magazines distributed
A ten-city ad campaign
...and that $1.2M Super Bowl ad
Acquiring customers was hard. It still is.

You could make ads.

Now you have search engines and SEO.

You could print brochures and manuals.

Now you have landing pages and online help centers.

You could run expensive classroom training centers.

Now we have to think differently about Customer Education.
But retaining customers is even harder.

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There is churn, and it is pervasive.

No “first value”? Churn.

No maturity or value realization? Churn.

Slow & painful churn.
We have to educate people on not just how to use our product, but quite frankly, that they need the product. And what they’d even do without a product.

Lincoln Murphy, Sixteen Ventures

How many thousands, or millions, of dollars has your company spent to acquire customers and drive adoption?
How much customer marketing?
How many drip campaigns?
How many CSMs?
How many ad-hoc “trainings”?
A simple, uncomfortable truth:

Your customers don’t *succeed* if they don’t *learn*. 
What does this look like from the customer’s point of view?
Learning a new product is like going on a journey without a map.
Some road trips are long, but straightforward.
Some are short, but still utterly baffling.
Some twist, turn, or take a winding path.
Some turn off the four-lane highway into the backroads.
Some go off the road entirely and require new paths.
And many are taken on foot.
Your product can help

Good product design makes the journey easier to follow.
Your CSMs and Support teams can help

Good people can help along the way, but they need to know that the customer needs help.

And can only help so many at a time.
Ultimately, your customers need to find their way

Who are we?

Are we the mapmakers?
Maybe we’re the GPS makers.
The new face of Customer Education

Today, a Customer Education function strategically accelerates **account** and **user growth** by:

- changing behaviors
- reducing barriers to value
- improving the way people work
So why a manifesto?

More new & “accidental” Customer Educators entering the market than ever!

Similar to the Agile Manifesto, we wanted to capture what we value over their tradeoffs.

The Agile Manifesto:

We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

- **Individuals and interactions** over processes and tools
- **Working software** over comprehensive documentation
- **Customer collaboration** over contract negotiation
- **Responding to change** over following a plan

That is, while there is value in the items on the right, we value the items on the left more.
Our Manifesto:

We believe that learning a new product is like taking a journey into parts unknown;

Fundamentally, **customers don’t succeed if they don’t learn.**

We are united in making our customers wildly successful:

Enabling them to **find value earlier**, and realize **more value over time**;

Anticipating and **removing the roadblocks** along their path;

By building educational **programs that scale**.

We believe that modern Customer Educators must:

1. Guide customers to **value**, versus educating them on every feature
2. Build a core program that **scales**, versus customizing every time
3. Lead with **data** tied to business **outcomes**, versus measuring our activity
4. Use **agile** practices to ship solutions **quickly**, versus perfecting our content
5. Design **experiences** we’d actually want to learn from, versus building safe, dry learning
6. Serve busy customers in their **moment of need**, versus making them do the work
#1: We prioritize guiding customers to our products’ value, over educating them on all of our products’ features.
Where do we actually spend our time teaching?

What do our learning programs help people do?

Our job is to guide our customers to value by using our products and features.

Customer Education closes key gaps for the customer such as the gaps between:

- buying a product and getting value from it
- being able to stumble around a product vs. feeling like a power user
- casual, organic usage and strategic usage that makes a real difference
- using a product because it looks interesting and using it because it will advance your career
Example: Salesforce Trailhead

Beyond product training, Trailhead is a learning platform.

It started as “the fun way to learn Salesforce” with developer/lab-oriented courses but has also moved into soft skills.

Trailhead uses different credentials, like badges, certifications, and super badges, to support different skill levels and types.

The Trailhead & Trailblazer branding has expanded into conferences, communities, and more.
We prioritize building programs that will scale over ones that require deep customization.
#2: Start with scale

What formats do we design for?

How do we achieve reach and scale, even in a revenue-generating environment?

Build a foundation of content that will scale before you start customizing via:

- Accurate, user-friendly docs
- An onboarding academy that helps new users looking to find value
- 3-5 minute videos on core concepts
- Webinars or virtual trainings that can serve many customers at once

This delivers a core of solid content to serve your customers who can’t pay for premium services, and you’ll have an approach to customize from when you serve your large customers.
Asana’s learning resources center around the Asana Guide, a centralized property that includes training webinars, articles, videos, and courses.

Asana takes a modular approach to creating content, using the same underlying curriculum and optimizing different resources for pre- and post-sales audiences.

For example, the guide serves “big picture” content for sales/marketing, docs for support, webinars for new users and teams, and Academy for free trial users. Each channel uses the same 2-minute “how to Asana” videos.
#3:
We prioritize connecting and measuring data that will tie our efforts to broader business outcomes, over reporting on activity metrics.
#3: Tie data to outcomes

Where do we focus our measurement efforts?

How do we prioritize our portfolios and programs with an eye toward metrics that affect our whole business?

When our programs are working well, they do more to...

- drive customer adoption
- reduce customer churn
- and aid retention and expansion
- scale and reduce human effort

….than it costs to staff them.

We don’t just measure seats and consumption. We measure the impact we have on our broader business, with an eye toward ROI.

Reach, revenue, and impact are all important but must be prioritized. We use data to focus our activity.
Example: Heap Analytics

Heap University serves customers’ needs for onboarding as well as specific use cases or lines of business.

The company uses its own always-on analytics product to tie training consumption to key product adoption metrics, and to answer key questions with data.

Monitoring correlations helps to show ROI and drives content refinement over time.
We prioritize shipping solutions quickly using agile methods, over perfecting our content.
#4: Stay agile and iterate

How do we build content development processes that reflect our ever-evolving products?

How do we create room for learning and experimentation in our own processes?

In SaaS, our products change faster than we can create or update material.

Although we keep quality in mind while designing experiences, we reject the dragon of perfectionism.

We believe that agile (methods like SAM) are vital to our success.

Philosophically, we:

- Break work into smaller units (chunking)
- Deliver content more frequently and get rapid feedback
- Work in Beta or Prototype states
- Are comfortable with imperfection
Outreach uses modified agile processes to achieve higher-quality on-demand content.

They use longer loops with **attention to quality, standardization, and process to allow for easy updates** -- but still an agile process!

Outcomes include a **pivot from live to on-demand content**, expanded portfolio of offerings, and learner confidence (leading to adoption).
#5: We prioritize designing the types of experiences we’d actually want to learn from, over adhering to safe, dry instructional methodologies.
#5: Learning we’d learn from

How do we build for meaningful engagement, taking a learner-first (not content-first) approach?

How do we design for engagement while avoiding fads that only seem like things learners want?

Instructional Design is now Learning Experience Design. We’re all in the UI/UX business.

We can no longer tolerate multiple-day classroom lectures (which nobody wants). Instead we have to engage the customer. What do they want?

- Clean interfaces
- Easy navigation
- Storytelling
- (some) fun and games
- A touch of emotion
- Shorter, punchier, more digestible content
Example: Twilio

Twilio built a role-playing game experience to teach developer skills, including high interactivity and lab-based environments to promote direct experience.

Through game-based missions, you create project work in a local development environment.

It’s hands on and a fun way to learn development skills for Twilio.
#6: We prioritize meeting customers where they are and serving them in their moment of need, over delivery methods that make them do the work.
#6: They’re busy, not lazy

How do we meet customers where they are, and make sure we’re designing learning to be contextual?

How do we create push and pull strategies?

If you build it, they won’t come.

We believe in bringing our educational materials to our learners by meeting them where they are:

- In our products, by creating sharp in-product tutorials surfaced through tooltips
- When they’re having trouble, by surfacing educational moments
- In places they already look for education, like Google searches and YouTube videos
- Even in their email, through nurture campaigns and promotions

Once our customers find our educational materials, we make it dead simple for them to find the next step.
Example: Intercom

Intercom believes in a strategy of “right help, right place, right time”

They use persona-based and contextual support to guide your experience of using their product, and frequently link out to relevant materials in their Intercom Academy and help center.

They also use a “best next step” approach to nurture campaigns, based on the customer’s actions and timing.

They also take a “less-is-more” approach, having tested a streamlined approach to customer onboarding against a previous 200+ message support model for the first 60 day experience.
Find the manifesto (and it's longer companion piece) at https://customer.education/

It's in the nav bar.

Sign if you agree!

Subscribe in Apple Podcasts, Stitcher, Spotify, Amazon Podcasts, or wherever you listen.

We release bi-weekly and even have an interview with Barry Kelly

We'd love to hear from you and stay in touch.

Use the contact form on https://customer.education or find us on Twitter or LinkedIn!
Thank You!

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