



EXECUTIVE SUMMARY

The Customer Education Playbook: A Methodology for Developing Impactful, Engaging, and Measurable Customer Education Programs

WHY READ THE PLAYBOOK

No matter your industry, your customers expect a quality product that is intuitive and easy to use. The last thing they want to do is to contact your customer service center for help, or worse, be delayed in using their new product. Many organizations struggle with overwhelmed contact centers, low customer satisfaction scores, and customer churn. To improve customer experience and their bottom line, organizations of all types are turning to customer education programs.

You may be wondering what exactly is the value of a customer education program? A thoughtful learning strategy not only helps to ensure your customers understand how to get the most out of your product or service quickly, but will provide them with a continuous opportunity to elevate their industry expertise and grow their business. This type of program can offer tangible benefits for your organization like building your brand reputation before and during the sales process, improving customer satisfaction, and reducing customer support costs.

As the leader in B2B customer training, Thought Industries has developed a research-backed Customer Education Playbook. This comprehensive guide offers twelve considerations for building a world-class customer education program. Getting started can be overwhelming and leave you unsure of how to pull together a program and know if it will deliver your desired results. This Playbook offers practical guidance on what to consider and how to be successful when you create this type of learning program.

KEY TAKEAWAYS

- ✓ Discover the key considerations for creating a powerful customer education program
- ✓ Find out what it takes to get organizational support for a formal program
- ✓ Learn how to drive customer experience and brand awareness through learning programs
- ✓ Deliver measurable results in customer education that will impact your business goals

Highlights of the Playbook

Design for Impact:

A challenge for many organizations is determining if a customer education program would support their business strategy. The Playbook helps to clarify the right questions to ask yourself to understand your customer's needs, develop a plan, select the best format, and choose learning content that will deliver results.

Content Development:

The right learning content and delivery methods will impact the success of a customer education program. The Playbook outlines what needs to be considered regarding who will deliver the materials and how they will put it together. It also covers considerations for the types of content your learners will require to gain mastery along with a deliberate approach to the timing of content distribution.

Measure and Refine:

A careful examination of the program performance is key to making improvements and showing a return on investment. The Playbook helps you to ask the right questions for your organization to effectively measure success, make improvements, and report on the most important metrics.

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Think of your customers, prospects, channel partners, dealers, suppliers, franchisees, developers, as well as your contract workforce. Every business ecosystem depends on some combination of these constituents. **And the more they know about your products and services, the more profitable those relationships are likely to be.**”

– JOHN LEH,
CEO & LEAD ANALYST,
TALENTED LEARNING

ABOUT THE RESEARCH

The Customer Education Playbook was developed out of a need for greater insights into building a compelling customer education program. Thought Industries used a detailed methodology to develop, test, and validate each of the twelve considerations within the Customer Education Playbook. Over 200 B2B customer education industry experts participated from training, customer support, customer success, sales, and marketing. The Playbook is just the beginning as we lay the groundwork for this journey and will continue to survey industry experts and update as new methods and innovations are developed to support the discipline. Our goal is to ensure it remains accurate and provides a roadmap to continued growth through customer education.



[Click here](#) for the complete version of the Customer Education Playbook and discover your pathway to improving customer success and business outcomes.

ABOUT THOUGHT INDUSTRIES

Thought Industries powers the business of learning by providing the world's leading B2B customer training platform. Founded in 2014, we believe that online learning experiences should be modern, intuitive, engaging, and scalable. We offer the only learning solution with completely native tools and integrations that drive higher engagement, learner proficiency, and retention rates for our customers.

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