



The Secret to Scale Digital Customer Experience

9 Tips for Boosting Customer Outcomes with Customer Education



Let's Face It: CX Needs a Reboot

Customer success teams are facing some steep challenges in 2024. You're operating with tighter resources and higher expectations, so efficiency and high return on investment are absolute must-haves.

Thankfully, there's one initiative that can relieve all kinds of burdensome tasks for customer success, while empowering customers and improving growth and retention: customer education.

Time-consuming tasks	Solutions provided by customer education
Hours spent individually onboarding new customers	Self-serve online courses
Tall stack of customer tickets	Robust guides addressing priority pain points
Creating courses that never get viewed	Incentivized course completion



Beyond time drains, we've identified four major challenges facing customer success teams in 2024. While technology and expectations are evolving, teams' challenges stay consistent: churn, upgrade rate, usage/expansion, and time to value.

But for each challenge, we've found an investment that can provide lasting change. Rather than spreading out your tight budget over dozens of initiatives, narrow your spend into these investments that can directly impact your major challenges: self-serve resources, upsell-oriented courses, improved onboarding, and data-informed educational guides.

Top 4 Challenges for CSTs	Top 4 Investments
Churn rate	Self-serve resources
Upgrade rate	Upsell-oriented courses
Usage/expansion	Improved onboarding
Time to value	Data-informed educational guides

How Customer Education Can Help

We hosted a webinar covering the topics discussed in this eBook and, at the start of the presentation, we took a poll about our audiences' priority pain points. For 75% of the webinar attendees, "Growing need for efficient growth & proving impact" was a primary concern.

Scalability is a massive challenge for customer success teams in 2024, who are trying to do more with less. Your CSM headcount may be going down, your business might be organizing, and you have to spend time strategically. The question then becomes: what can be automated or placed in the hands of customers?

Customer education.

What we're seeing	What you can do
<ul style="list-style-type: none">• Broad restructuring of CS orgs & team focus	<ul style="list-style-type: none">• Re-imagine the traditional CS model & tap into new resources
<ul style="list-style-type: none">• Demand for 1:many, digital, & scaled CS	<ul style="list-style-type: none">• Evolve into a self-serve customer engine
<ul style="list-style-type: none">• Desire for always-on & multi-media learning	<ul style="list-style-type: none">• Explore new content formats & delivery methods
<ul style="list-style-type: none">• Rapid overload of automation & AI	<ul style="list-style-type: none">• Establish 'smart' uses & ignore the rest
<ul style="list-style-type: none">• Growing need for efficient growth & proving impact	<ul style="list-style-type: none">• Build a clear dashboard & prove cost savings



Customer education has proven to be a powerful investment for customer success teams looking to grow and improve processes on a tight budget. Here are the stats¹:



Clearly, thorough training is an impactful driver of usability and retention. Not to mention, educated customers become product champions. When they understand how to fully employ your tool, they're far more likely to expand their usage of the tool and recommend others to engage with it.

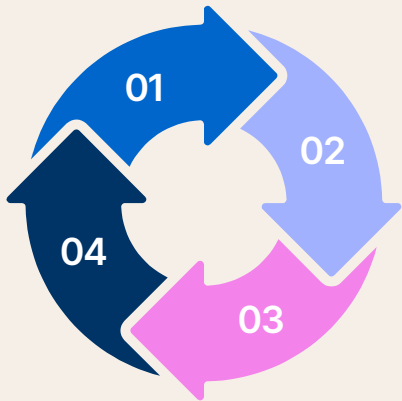
Before we dive into the content, there's one important prerequisite: you need to access your data. You can't create an optimized self-serve experience for your customers without data on their usage and behavior.

¹Source: TSIA



The Measurable Results Loop

At Skilljar, we take advantage of something called the Measurable Results Loop to guide our customer education development. This loop can be broken down into four parts that make our customer education initiatives click:



Define your user funnel.

Identify the event that defines conversion for your company and pick which metric you'll use to measure it.

Analyze training event data.

Look at the data of users who have completed the funnel and compare it to those who haven't. What are the differences in the segments? What about the usability? For example, where in the process are customers exiting the funnel?

Build programs to support the funnel.

Ask yourself: what drives your customers toward the conversion event?

Take action.

Once you've collected data, you'll want to bridge the gap and make changes to your process.

Now that we know the basics of implementing a funnel-based customer education initiative, let's dive into the tips. These tips are organized into buckets tackling three of the major challenges facing customer success teams: onboarding, product usage, and retention.

Bucket 1: Optimize Onboarding and Accelerate Time to Value

The first application of customer education we'll be looking at tackles one of the main challenges facing CS teams in 2024: time to value. These three tips will help your team accelerate the pace of onboarding, tackling these guiding questions:

- How do you speed up time to value?
- How do you ensure CSMs have properly onboarded users?
- How do you personalize the experience without extra work?



Tip 1: Validate your assumptions with data

When launching a customer education initiative to help accelerate your time to value, you'll want to prioritize data in your decision-making. Returning to our funnel recommendation, capture data at each point along the funnel and, specifically, about funnel conversion.

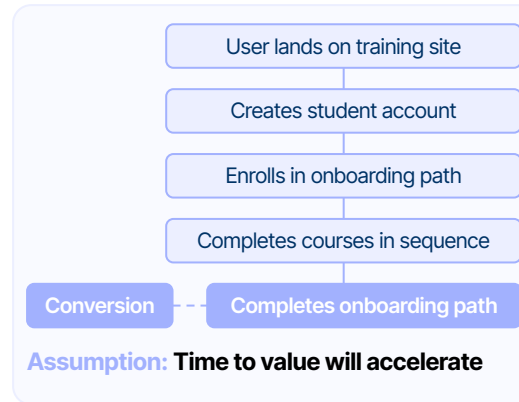
Start by selecting a conversion rate which, in many cases, will be the completion of onboarding. As your program guides people down the funnel, you'll be able to measure results compared to the metrics of your prior model.



How we're doing it

When Skilljar first created the Skilljar Academy, it was based on a hunch that providing a self-serve resource would speed up our customers' time to value while lowering the amount of time our CSMs spent in the onboarding process. Users were spending 6 hours, on average, with our CSMs. We decided to create this funnel instead.

We validated our assumptions with data and discovered that using self-serve resources shrunk time to value significantly, from 120 days to 90 days. We also shrunk the amount of time CSMs spent training customers from 6 hours on average to 0. Our initiative was a success — and we could back it up with data.





Tip 2: Use automation to reduce barriers to entry

Learning a new piece of technology can sit on a customer's to-do list for a while. When you reduce barriers to entry, you make it easier for the customer to take the initiative to get started with onboarding.

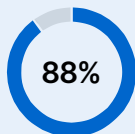
Reducing barriers is all about lessening friction. Consider what might make customer education difficult for your customers and brainstorm how you can tackle it. You'd be surprised by the way small changes can have an impact on your customers. And, because you're using data, you'll be able to measure how successful each change is.

Here are some tweaks you can make to reduce barriers to entry:

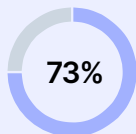
- Implement single-sign-on (SSO) to make it faster and easier to enter your course
- Simplify the registration process to just the information you need
- Send a welcome email with a direct link to onboarding. If they haven't clicked it after a week, automate a follow-up message with direct access to your course.



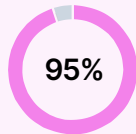
Tip 3: Personalize onboarding content by segment



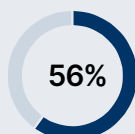
Of customers state that "the experience a company provides is as important as its products or services."



Expect companies to "understand their unique needs and expectations".



Want companies to "anticipate their needs" before they even express them.



Desire "personalized offers" reflecting a demand for customization.



Users have a growing interest in personalized content, as shown in the chart above. Your customers don't want to have to siphon through a lot of content that isn't relevant to their use case. Instead, group your customers by segment and then leverage automation to personalize onboarding so it speaks directly to their needs.



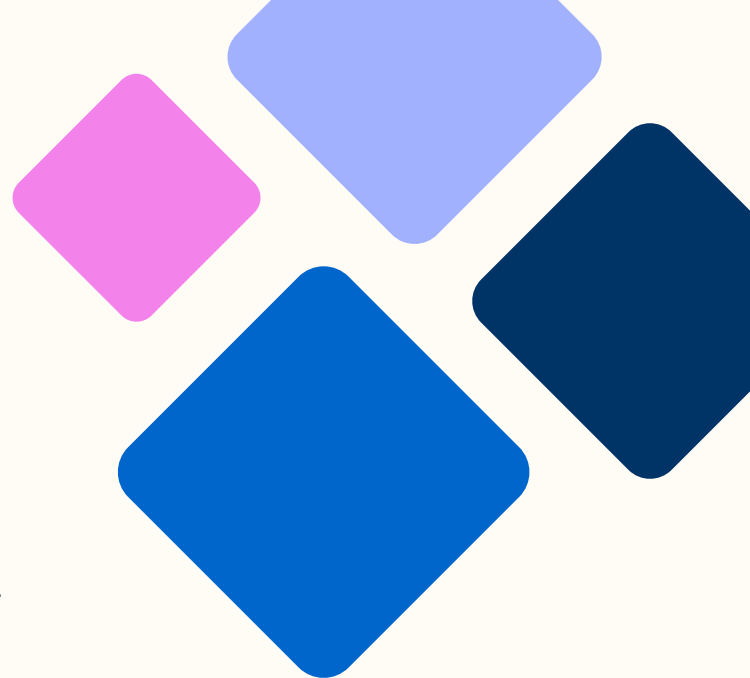
How we're doing it

You'll likely find that some courses are relevant to everyone. At Skilljar, we have four courses that are automatically assigned to all participants. Then, our modules are tailored to the needs of each of our user segments. The result has been an increase in course utilization — because people don't need to navigate a complicated library on their own.

Bucket 1: Filled!

To close the gap between becoming a customer and completing onboarding, use data to power your assumptions, take advantage of automation to reduce barriers to entry, and personalize your onboarding by segment.

We've found there's a significant benefit to streamlining the onboarding process for CS teams and their customers. At Skilljar, 68% of our customers use the product more once thoroughly trained. One of the customers using our tools has seen a 75% reduction in customer onboarding time by implementing our customer education tools.



Bucket 2: Amplify Product Usage Activation

Once your customer is onboarded, you want to ensure they're taking full advantage of your tool. To amplify the product usage activation, we're covering three tips that help address these guiding questions:

- How can education improve feature activation and increase biz outcomes?
- How do you identify and adapt activation strategies for different users?
- How do you measure the increase in product adoption?



Tip 4: Create Modular Training for Core Product Features

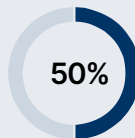
One of the best ways to improve feature activation is to create a modular training course. A modular training course features bite-size components where users can quickly learn something new about a feature.

You'll want to ensure your modular course library is searchable and easily accessible. If you're unsure where to start with your modular training library, start by looking at the #1 cause of questions and tickets being submitted by customers. Create a module that addresses what most people are asking about and, from there, you can connect additional modules, creating a modular path, which guides users through more complex activation.



How we're doing it

At Skilljar, we created a modular course library, beginning with high-priority tickets and moving outward into more complicated applications of our tool. We also made our modular trainings multi-content so that you can email a module to someone and, if they've got SSO enabled, they can access it quickly without even knowing they're in the Skilljar library.



Our modular content library reduced tickets on our #1 most inquired-about topic by 50%.



Tip 5: Embrace AI to fuel content at scale

The availability of AI makes it easier than ever to amplify your impact as a customer success manager. You can use a generative AI tool to brainstorm, develop solutions to recurring problems, and course descriptions. AI doesn't replace customer education experts — but it enhances their ability to scale their initiative faster.



How Skilljar can help you take advantage of AI

Skilljar offers native AI features that enable CSMs to create things like course descriptions and quizzes in seconds. Talking with a GenAI bot is also a great way to get some inspiration for new projects, so if you're wondering where to grow your customer education, you can start with a quick chat.



AI prompts:

"What does a project manager need to know about a project management software?"

"What learning objectives are most relevant for a chief technical officer who just purchased a new project management software?"

"Imagine you're an instructional designer, take this outline and turn it into a video series for an admin using WorkFast, Inc.' "



Tip 6: Create measurable product certification funnels

Customers love the satisfaction of knowing they've completed a training. Certifications incentivize completion and allow opportunities for customers to share their achievements with other team members and higher-ups.

And not only that, but measurable product certification funnels provide you with excellent data about your customer's product activation. Spot bottlenecks in your course progression or compare completion rates against feature activation within your actual tool.

The screenshot displays a user interface for a certification exam. At the top left, a blue banner reads "Earn a Certificate" with a sub-header "Show your industry knowledge by earning your certificate in the Foundations of Customer Education or show off your Skilljar Dashboard acumen with the Skilljar Admin Professional Certificate." Below this is a "Show what you know!" section with a challenge: "Think you have what it takes as a professional in Customer Education and Enablement? Are you a Skilljar Dashboard aficionado? Earn a certificate for both by completing these free exams and earning your certificate!"

Two exam options are listed:

- Foundations in Customer Education**: Learn what you need to know to build an amazing Customer Education. 45 Min. Earn Certificate.
- Skilljar Admin Professional Exam**: Demonstrate your Skilljar knowledge. Complete this exam to earn your Admin-level Skilljar Admin Professional certificate. 45 Min. Earn Certificate.

The right side of the page features the "Skilljar Admin Professional Exam" details, including a "Register" button, an "About this exam" section with a "Before you begin" link, and a "Curriculum (~60 min)" section.

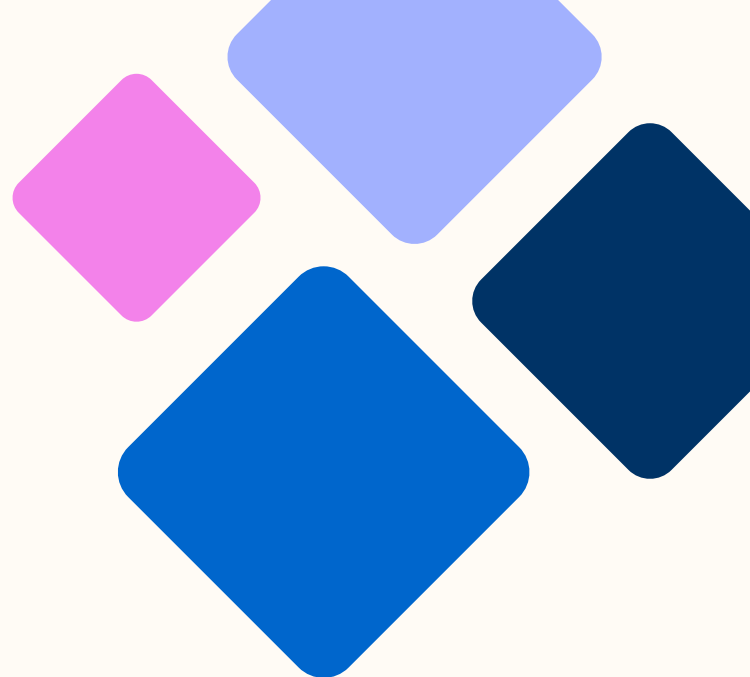
At the bottom, a "Badges Earned" section shows a table with the following data:

Badge Name	Date Earned
Skilljar Advanced Analytics	2021-Jan-18

Bucket 2: Filled!

To increase your activation, you'll want to create modular training courses that use AI to help you scale, and then provide incentives for completion and opportunity for measurement with product certification funnels.

When we implemented these techniques, we saw an 87% rise in customers using the product more independently. For one of our clients, they saw an increase in product usage of 200% after taking advantage of our product activation approach.



Bucket 3: Retention

Finally, the last major concern of customer success teams is retention. It's no good to onboard your customers, only for them to leave shortly after. We'll deliver three tips that'll help you address these guiding questions about retention:

- How do I spot churn risks? Are there any trends?
- How do I automate getting ahead before it's too late?
- How do I not just prevent churn, but boost expansion?



Tip 7: Create thought leadership content

One way to keep customers engaged and subscribed to your tool is by providing them with thought leadership that goes beyond the application of the tool. One way to do this is by creating courses that certify industry expertise and build customer advocates. When you empower education in this way, your customers truly benefit from your work and are more likely to go out and tell their colleagues about your tool.



Skilljar Quick Tip!

Our completion certifications are totally shareable, so when customers complete their training, they can post about it on LinkedIn. When users click their LinkedIn post, they'll be directed back to a Skilljar landing page.

You can also engage with your audience through other types of thought leadership, like blog posts, guides, and podcasts. You can even host your customers for a chat and ask them about their industry and the application of your tool to promote engagement. Get creative.



Tip 8: Offer advanced training modules mapping to stages in your customer journey

Another great way to retain customers is by engaging them with other products in your company portfolio. One way to do that is by training them on additional products before they buy them. If users can see the impact of a product they don't yet have, they're far more likely to purchase it themselves.

You can also connect your sales team to your course structure so that they can see when customers engage with a course about a tool they haven't yet purchased. Then, your sales team can time their engagement with your customer to maximize potential conversion.



Tip 9: Use consumption data to optimize content over time and increase engagement

Keep track of in-platform data that monitors who's accessing what content and how far they're getting into it. And be careful not to just set it and forget it — return to it and let it inform your course development.

Start by asking yourself: where are users spending the most and least time? Consider splicing the content into multiple modules for long videos that many users watch. If you have a low-engagement course, gamify it or add some other engaging qualities.



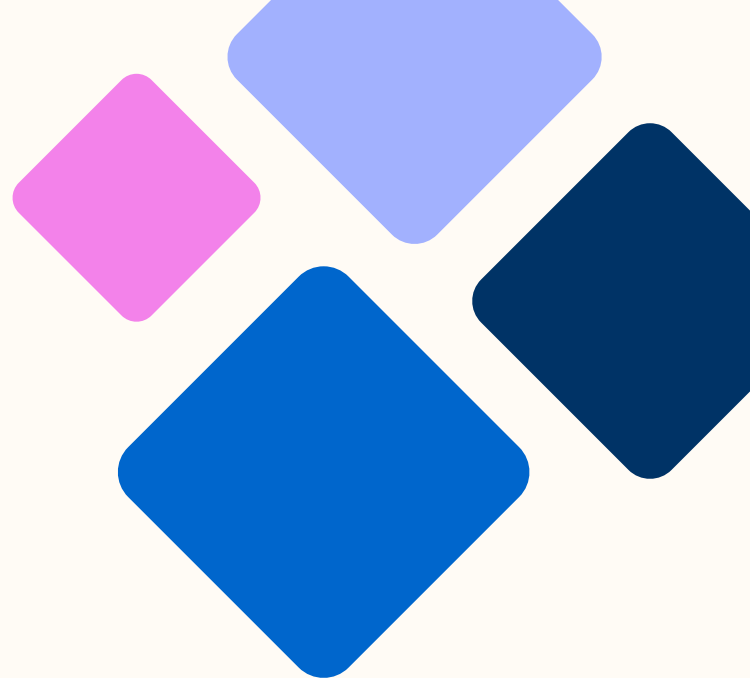
How we're doing it

We're adding clickpaths to some of our courses at Skilljar. Engagement skyrockets because people can interact with the course as they learn. But, as with anything, there are many ways to attack engagement. Don't be afraid to get creative with it.

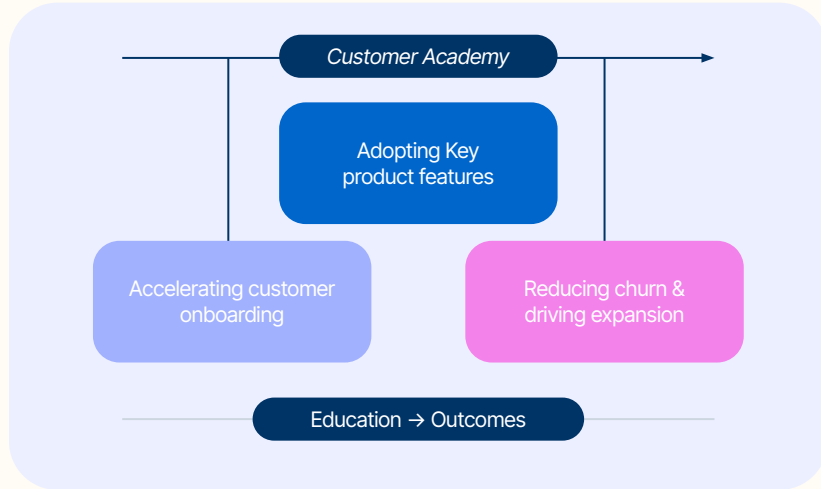
Bucket 3: Filled!

Retention can feel like a difficult metric to improve, but with thought leadership, advanced training modules, and diligent data analysis and optimization over time, you can expect a rise in engagement and retention.

Our training adjustments have revamped retention for Skilljar. 92% of our customers renew their contract once they've been thoroughly onboarded. And our customers are seeing great results, too — one of our clients saw a 95% increase in customer retention.



Wrapping it up



We aren't just advocates for customer education at Skilljar — we're advocates for strategy. When you implement specific, strategic education for your users, you create opportunities for impact along the entire customer journey. When you're not sure which direction to take your initiative, return to these 9 tips for our best practices.

Accelerate Onboarding

1. Validate your assumptions with data
2. Use automation to reduce barrier to entry
3. Personalize onboarding content by segment

Amplify Product (Usage) Activation

1. Creating modular training for core product features
2. Embrace AI to fuel content at scale
3. Create product certification funnels and measure results

Reduce Customer Churn

1. Create thought leadership content
2. Offer advanced training modules mapped to stages in your customer journey
3. Use data to Optimize Content Over Time (interactive learning)

And before you go... we have a surprise.

A bonus tip!

Increase productivity

We covered the benefits that launching a customer education initiative can have on easing onboarding, increasing product activation, and improving retention — but we didn't fully cover the way that a great initiative can save you and your customer success team time.

One of our partners, Qualia, was able to implement a simple and effective online training program for their customer base. It has a built-in Salesforce integration, as well, making it easy to track account-level performance between customers. The result was a 30% increase in the CS team's productivity at Qualia.

To learn more about how Skilljar can revolutionize your customer education, [schedule a demo](#) with our team. We can't wait to hear from you.

