

# CedMA CONFERENCE 2021

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## Secrets from World-Class Customer Education Programs

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*Thought Industries*

# AGENDA

## **No 01**

The Customer Education Playbook

## **No 02**

Helping Customers Achieve Success

## **No 03**

Focusing on Customers as Learners

## **No 04**

How Great Customer Learning Programs Grow

## **No 05**

Mindsets of Great Customer Learning Leaders

## **No 06**

The Future of Customer Learning

# Thought Industries At-a-Glance

Thought Industries is driving the future of on-demand learning systems for customers, partners and professional training organizations.

Customer Learning Management

Headquarters: Boston, MA

EMEA Headquarters

Dublin, Ireland

Founded 2013

+50% YoY Growth Since 2014

500+ Clients

8.6M Registered Learners

Challenger

CATERPILLAR

Dale Carnegie

THE LINUX FOUNDATION

h HR CERTIFICATION INSTITUTE™

INCRAM MICRO

3M

ebay

GALLUP®

EBSCO

//CODiE//

2021 SIIA CODiE WINNER

Best Customer Learning Platform





# What We Care About



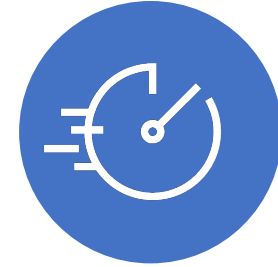
**Community and industry research**  
that advances  
the learning  
professional



**Scalability,**  
so customers  
never run out  
of runway



**Practical Innovation** that  
puts the latest  
technology at  
your disposal



**Professional Services and Customer Success**  
focused on time-  
to-value

# The Customer Education Playbook

## The Framework

(1) Define your goals for customer education

(2) Define success for your customer

(3) Determine what your customers need to know to achieve success

(4) Create a customer education development plan

(5) Identify the optimal format for educating the customer

(6) Determine the content to include in the education

(7) Educate the team who will deliver customer education

(8) Create the content and the experience

(9) Distribute the content

(10) Assess the success of the education

(11) Improve the education

(12) Report on customer success and revenue metrics

# The Customer Education Playbook

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# Helping Customers Achieve Success



Success is... improving productivity and collaboration.

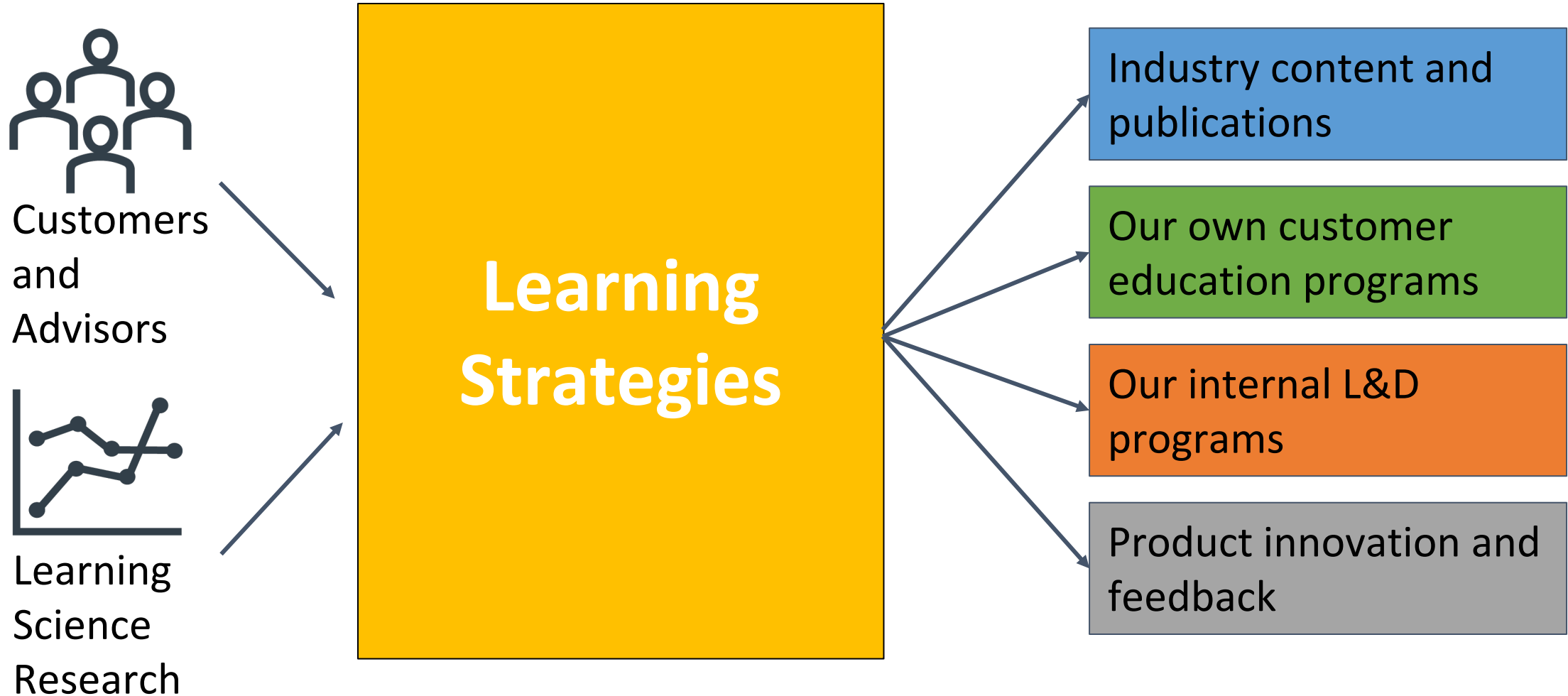


Success is... achieving lift through experimentation.



Success is... delivering exceptional customer learning.

# Learning Strategies at Thought Industries





# Thought Industries Academy

Thought Industries

Thought Industries  
Launches On-Demand  
Academy for Customer  
Learning

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# Not all customers are the same!



## Camilla Course Author

- 3-5 years experience
- Works in training or Customer Education

Camilla has been creating learning content for a few years now, but is new to Ti and to our authoring tool. She's also just picked up her understanding of learning on the job and would love to learn best practices.

### Goals

- Make this change worth our time
- Simplify workflows
- Offload administrative duties to others
- Teach others to use the tool
- Manage questions and issues easily

### Needs

- Easy authoring that saves time
- Course troubleshooting that's easy to follow
- Well-designed training to take



## Sydney Site Designer

- 3+ years design strategy
- Works in Marketing

Sydney knows their way around a website and the company's branding and has specific ideas about how they'd like the learning site to work. They've had some unhappy experiences with platforms in the past, but are willing to learn and adapt.

### Goals

- Sell the training (or get people to use it)
- Create a simple, intuitive, beautiful site
- Avoid maintenance work as much as possible
- Prove the customer value and impact the bottom line

### Needs

- Training designed around their specific use cases
- Hands-on experiences
- Handy information about site specific (asset sizes, CSS, etc.)



## Aubrey Admin

- 3-5 years experience
- Works in training department

This is Aubrey's first job as a system administrator, so she wants things to run smoothly from the get-go. She needs to please internal and external audiences and feels the pressure to make training successful.

### Goals

- Learn about designing great learning
- Build and test content easily
- Show that the learning works/creates value
- See what works and replicate where possible

### Needs

- Solve issues quickly
- Simplify workflows
- Hands-on assistance, especially at beginning
- Assistance onboarding others



## Ian IT person

- 5+ years experience
- Works in IT

Ian wears a lot of hats and has many competing deadlines. He's here to help the team set up SSO and/or other integrations and to get the site launched securely. He wants to help, but also needs to move efficiently and effectively to get work done.

### Goals

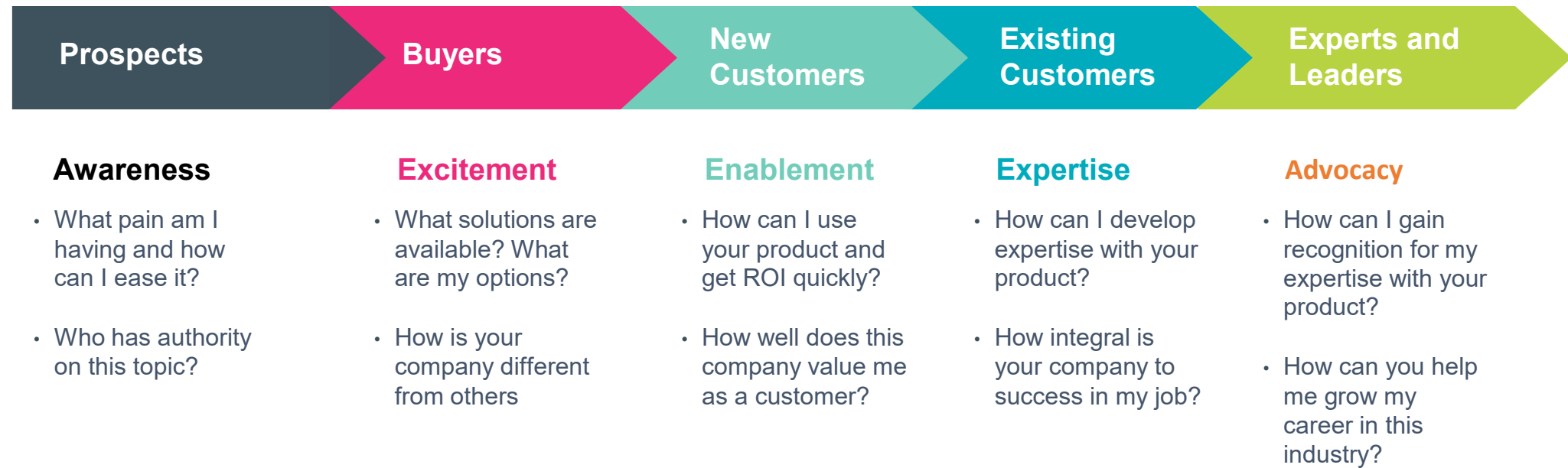
- Get this done quickly and efficiently
- Leave system administration to someone else
- Secure interactions
- Save time through solid integrations

### Needs

- Clear, concise instructions
- Key information about Ti system that's easy to find with search
- Direct help when something doesn't work as expected

# Focusing on Customers as Learners

Left to their own devices, customers will often struggle throughout the learning process.



# Thank You to Our Advisors

Aaron Christensen, Manager of Product, **Korn Ferry**

Adam Avramescu, Director of Enterprise Customer  
Learning & Enablement, **Slack**

Alison Hunt, Technical Program Manager, **The Linux Foundation**

Andrea Seal, Digital Strategist for Product Enablement, **Forcepoint**

Ben Hartfield, Sr. Director of The Hackett Institute, **The Hackett  
Group**

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Bill Cushard, General Manager, **Service Rocket**

Cary Self, Global VP of Education & Program Development,  
**CustomerGauge**

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**Onshape/PTC**

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Tynan Fischer, VP of Training & Technology, **United Training**

Tom Studdert, VP of Customer Onboarding &  
Implementation Education, **ZoomInfo**

# How Great Learning Programs Grow

## Five-Step Roadmap to Competitive Advantage

1

**Keep up with the Training Backlog**

- ➡ (Most) learning is live
- ➡ (Lots of) one-off customization

2

**Build Digital Foundation for Scale**

- ➡ Learning platform(s) up and running
- ➡ 80/20 of learning requests met on-demand

3

**Personalize Learning**

- ➡ Learner personas, differentiated paths
- ➡ Content-effectiveness dashboard

4

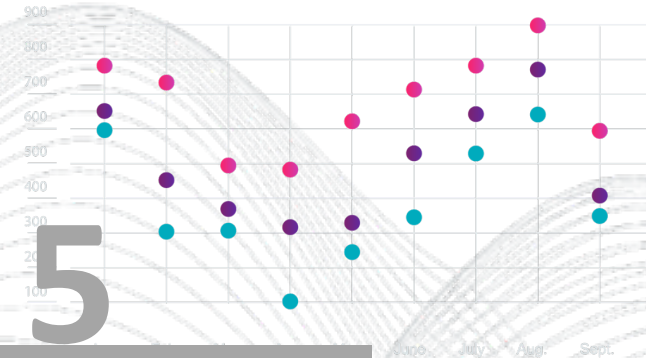
**Deliver Business Impact**

- ➡ Learning drives performance gains
- ➡ Business-impact dashboard

5

**Pioneer Best-in-Class Learning**

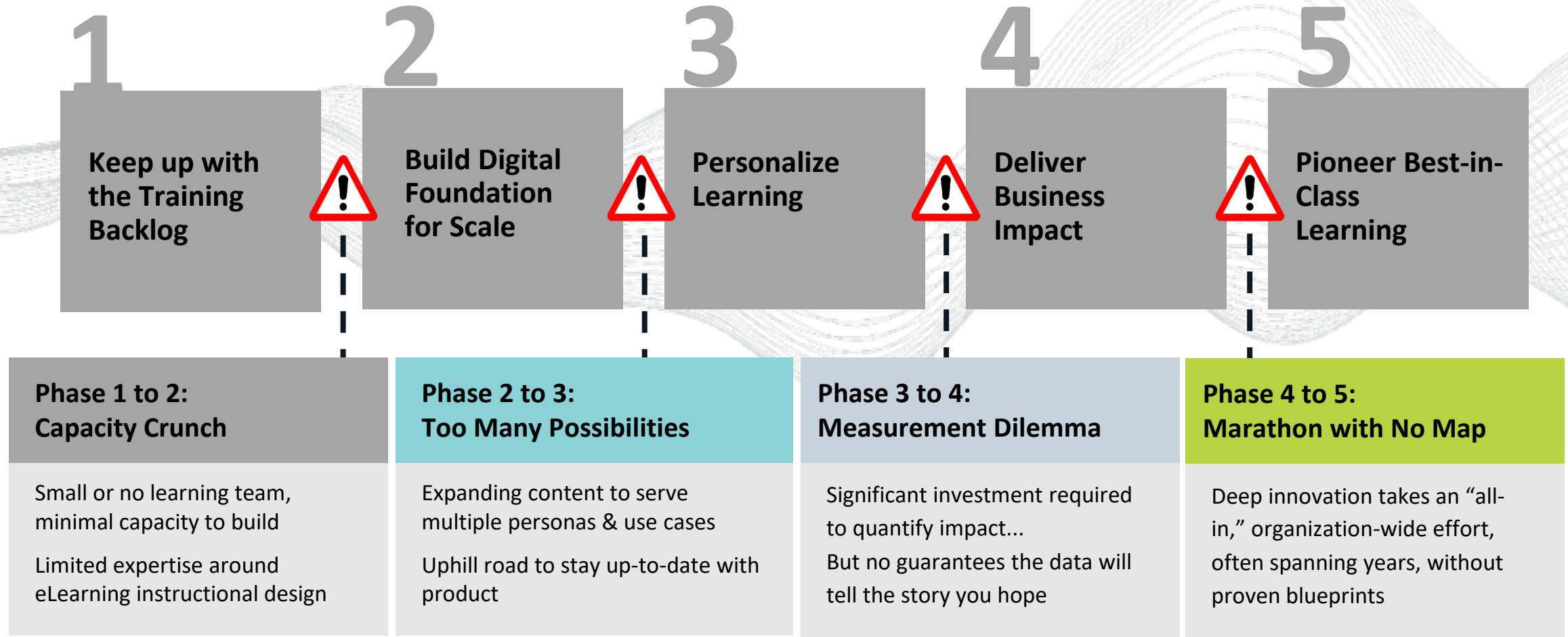
- ➡ Category-beating learning experiences
- ➡ Educate the market, own the category





# How Great Learning Programs Grow

## Major Barriers Along the Path



# Four Mindsets of Great Customer Learning Leaders

## Think Backwards

Start with **impact metrics**  
Identify **high-impact learner segments**,  
and needs  
Build learning to **solve problems**,  
not teach features



## Build an Engine, not a Backlog

Align **content & product cycles**  
All teams have **defined roles**  
**Agile** approach to development



## Orchestrate a Whole-of-Org Learning Strategy

Learning isn't a "silo"  
**Sync closely** with cross-functional leaders  
Power performance gains **across teams**



## Focus on Change Management Every Day

**Uncover concerns** early  
Create **win-win vision**  
**Celebrate** progress  
Over-**communicate**



# Best Practices for Growing a Customer Learning Enterprise

## Enterprise

## Barriers to Maturity

## Best Practices

Phase 1 to 2:  
Capacity Crunch

Phase 2 to 3:  
Too Many Possibilities

Phase 3 to 4:  
Measurement Dilemma

“Office Hours”  
Content Engine at  
Thought Industries

Customer Empathy  
Audit at Dodecahedron  
Technologies

Daily Impact Interviews at The  
Advisory Board Company

Six-Week Content  
Sprint at  
Kelly Consulting

Agile Content Development at  
AlphaHorizons

Outcomes-First  
Content Strategy at  
Data Architects



## CASE IN BRIEF

# Thought Industries

Software  
100+ Employees

### Best Practice

Live group support sessions  
recorded & repurposed

### Impact

# 55+

hours of learning content  
generated in 1 year

## “Office Hours” Content Engine

# 1-2

**Barrier** To scale onboarding, needed to scale on-demand content library (but no learning team)

### Component 1

Weekly open “Office Hours” held live on Zoom and are recorded. Topics are **mapped out** in advance, and published.

### Component 3

Office hours cover product **updates**, yielding updated on-demand content.

### Component 2

Recordings translated into multi-format, on-demand content. Topic-specific segments become support articles, videos, and eLearning.

## CASE IN BRIEF

### Kelly Consulting

Research, Analytics, Consulting  
13,000 Employees

#### Best Practice

Learning team switches from  
“fishing support” to “teaching  
teams to fish”

#### Impact

**Multiple** business lines launch  
MVP on-demand customer  
learning content post-sprint

# Six-Week Content Sprint

# 1-2

**Barrier** 4-person learning team a bottleneck in launching on-demand customer learning for 10+ business lines

## Component 1

“Content academy” for business lines, covering:

- Content strategy
- Measuring success
- Development practices + templates
- Customer communications and content marketing

## Component 3

**Monthly content huddles.** Live gatherings of leaders across business lines, featuring leaderboards, to mark progress, address problems, and share best practices.

## Component 2

**Summer content sprint.** Defined six-week period with minimal customer obligations to focus on building MVP learning for each business line.

## Overcoming the Capacity Crunch

# 1-2

### Challenges at this Stage

Small or no education team,  
**limited capacity to build**

Lack of **instructional design expertise**

Tech **learning curve** and  
**administrative time-suck**

### Selected Best Practices

- **“Office Hours” Content Engine**  
Live sessions do triple duty to build out your content library with low lift
- **Six-Week Content Sprint**  
Build on-demand “teach-to-fish” support for internal teams and coordinate a rapid development sprint
- **Customer Education Charter**  
Shine a spotlight on the vision for learning and win-win outcomes across functional teams
- **Outsourced Production**  
Take pressure off overburdened SMEs by inexpensively outsourcing voiceovers, graphic design, video production
- **Walking-Around Deck**  
Simple, 1-3 slide case for customer education investment to quickly & easily present to executives & key stakeholders

## CASE IN BRIEF

# Dodecahedron Technologies

SaaS  
1,000+ Employees

### Best Practice

Survey sent to CSMs & customers; gap analysis

### Impact

# 250%

Content adoption  
Increase over 2 years

## Customer Empathy Audit

# 2-3

**Barrier** Users frustrated on-demand offerings don't solve their problems, well

### Component 1

**Two-sided 18-question survey**  
administered to 20+ customers and 20+ customer-facing roles. Measured learning needs, frustrations, preferred education formats.

### Component 3

**Rapid, focused response**  
Built out learning offerings for high-priority needs. Reorganized academy, and conducted training for customer-facing teams.

### Component 2

**Gap analysis identified unmet learning needs** for customers (concepts and use-cases). Surfaced “blind spots” where enablement missed customer pain points.

# Agile Content Development

# 2-3

## CASE IN BRIEF

### AlphaHorizons

Software  
2,300+ Employees

#### Best Practice

Embedded learning content development in agile product sprints

#### Impact

# 18x

Faster release cycles, for content virtually in-sync with product releases; 7x fewer support requests from trained users

**Barrier** Learning content lags up to 6+ months behind product release

#### Component 1

##### Embed in product sprints

Enablement team “in the room” for agile sprint planning. Key SMEs hand off requirements for new content

#### Component 4

##### Shared dashboards

Team utilization/capacity, risks, development output

#### Component 2

##### 3-Phase content release

“MVP” used for internal enablement, “beta” deployed to partners, “production” content released to customers

#### Component 5

##### Bi-weekly huddle

Heads of engineering, product management, & enablement to track priorities and progress

#### Component 3

##### Templates for common content types

From micro-learning to certification journeys

## Narrowing in on Impact

# 2-3

### Challenges at This Stage

**Deciphering what content will be highest-impact**

requires deep understanding of customers & user personas

**Need to expand learning content** to address multiple personas, use cases

**Need to update all offerings** at the speed of product releases

### Selected Best Practices

- **Customer Empathy Audit**

Triangulate unmet customer needs and pain points with a two-sided survey

- **Agile Content Development**

Embed learning development in product sprints and build cross-functional infrastructure

- **Multi-use Content Modules**

Construct interlocking persona-specific, general-purpose, free, and fee-based learning modules, maximizing content re-use

- **Community-Centered Learning Needs Discovery**

Source customer feedback from many channels; cross-functional team members participate in 2 client calls per month

## CASE IN BRIEF

# The Advisory Board Company

Research & Consulting  
3,000+ Employees

## Best Practice

25/mo user interviews to continuously surface barriers, needs, impact

## Impact

# 300+%

Product adoption following implementation

# Daily Impact Interviews

# 3-4

**Barrier** Easy to measure “learning”, hard to measure “impact”

## Component 1

**Build a pipeline of 25 user interviews per month**

Mix of “high-utilizers” and “non-users”

## Component 2

**Structured multi-focus interviews**

Product team interviews customers on barriers + incentives to adoption, key insights from learning, and specific value achieved.

## Component 3

**Customer stories documented, feedback channeled across business**

to content, product, success, and sales teams

# Outcomes-First Content Strategy

# 3-4

## CASE IN BRIEF

### Data Architects

Data & Software  
500+ Employees

#### Best Practice

Use cases are determined pre-content development, then whole org is enable

#### Impact

Education function's profile and purview raised within the org

#### Barrier

Despite high-utilization, gap to goal for learning “impact”

#### Component 1

##### Weekly executive prioritization meeting

Education lead meets weekly with CEO + CMO to identify priority use-cases for learning support

#### Component 2

##### Whole-of-org content reuse strategy

Learning labs used in sales + product demos, usage dashboards tee up high-value customer success interactions

#### Component 3

##### High-impact learning marketing campaigns

Academy landing pages, federated search, and customer success “bingo” cards



# Overcoming the Measurement Dilemma

3-4

## Challenges at This Stage

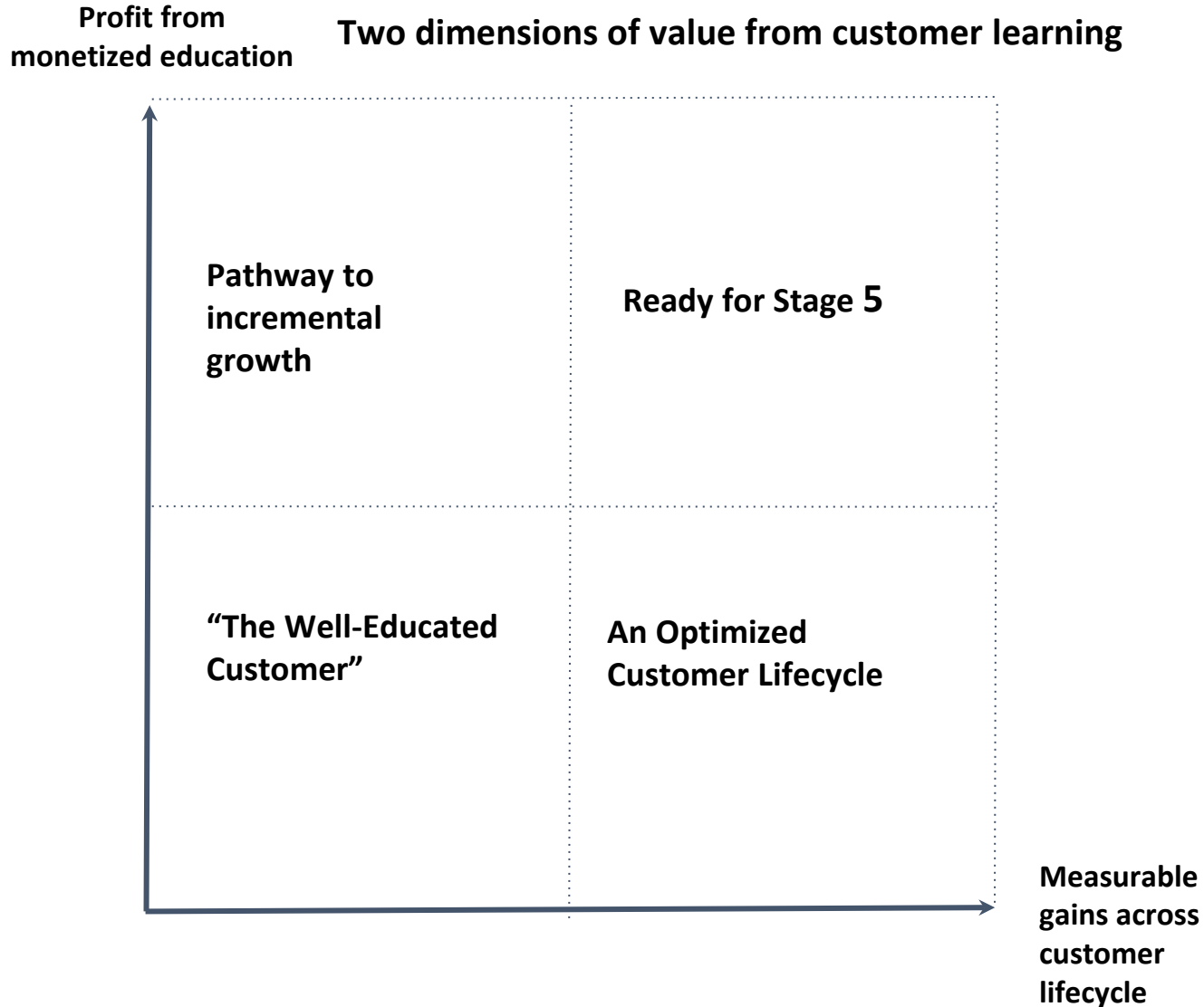
**Difficult to quantify impact** (through integrated data architecture and/or analysis)

To make an impact, **learning must solve real customer problems**, not just “educate”

### Selected Best Practices

- **Daily Impact Interviews**  
Customer value/impact interviews occur every day, feedback is funneled into product update roadmap
- **Outcomes-First Content Strategy**  
Focus learning development (and marketing) on priority use cases; distribute learning content & tools to enable many internal teams
- **Time-Released Learning Content**  
Learning & enablement “automatically” launched at key moments in the customer lifecycle - right message, right time, right audience

# The Monetization Matrix



## Three Benefits of Monetization

1

Fees create accountability for learning

2

Revenue supports additional growth and innovation

3

Profit gives education leaders a seat at the table

# The Future of Customer Learning



**Individual Learning Needs  
Prediction**



**Moment-of-Need  
Learning**



**Simulation  
& Immersion**



**Global Scale**



**Portable Credentials**

# Building the Future, Together

1

Keep up with the  
Training Backlog

2

Build Digital  
Foundation  
for Scale

3

Personalize  
Learning

4

Deliver  
Business  
Impact

5

Pioneer Best-in-  
Class  
Learning



**Merlin**  
Create quickly



**Helium**  
Maximum extensibility



**Atlas**  
Moment-of-need  
learning (anywhere)



**Pulse**  
Data-driven insights

Community, Expertise, Best-Practices

# Opportunities for Partnership

## Participate in our research

Share your expertise and flag your “burning questions”

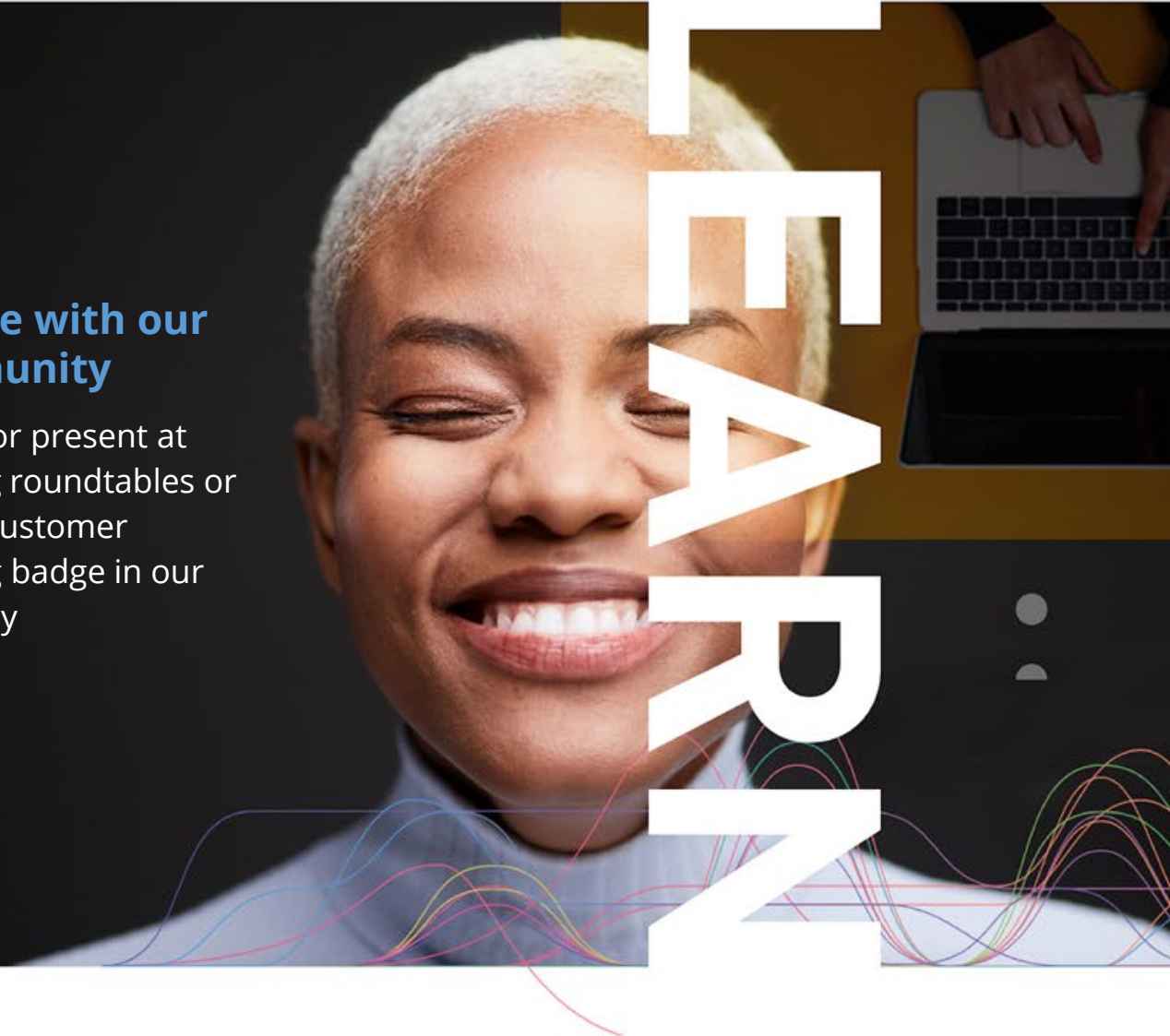
Connect with us! [hello@thoughtindustries.com](mailto:hello@thoughtindustries.com)

## Connect for a strategy chat

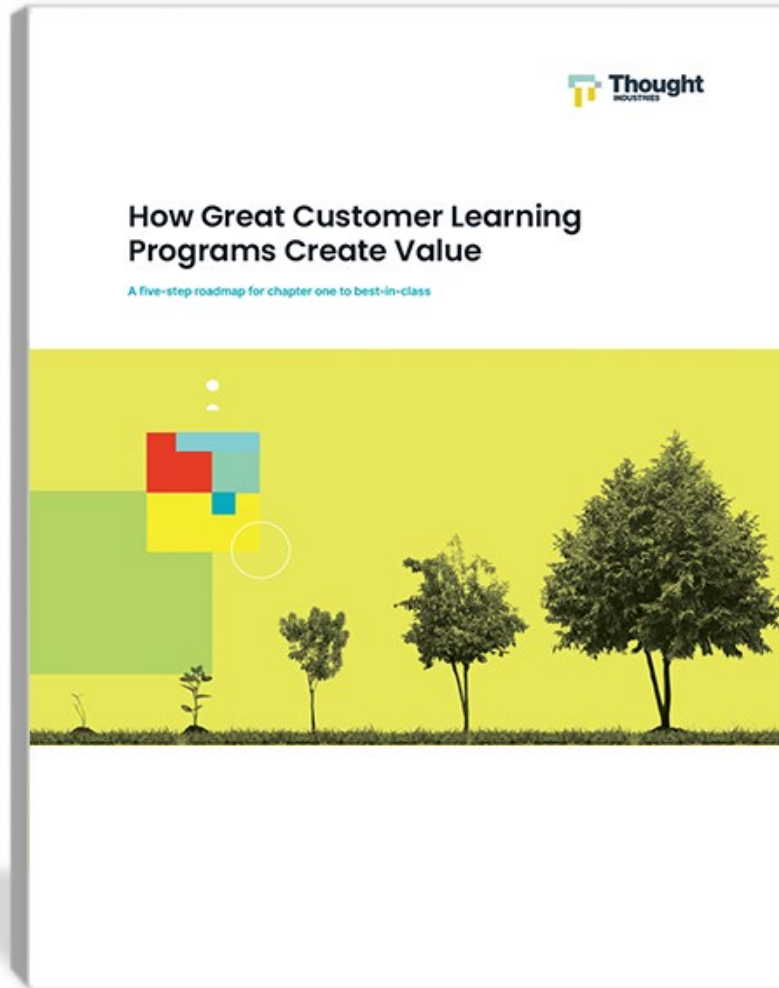
Share your current challenges and explore possible next steps

## Engage with our community

Attend or present at ongoing roundtables or earn a customer learning badge in our Academy



# What's Next?



# What's Next?

WEBINAR

## How to Level Up: Growing your Customer Education Program Maturity

[Read More](#)





# What's Next?

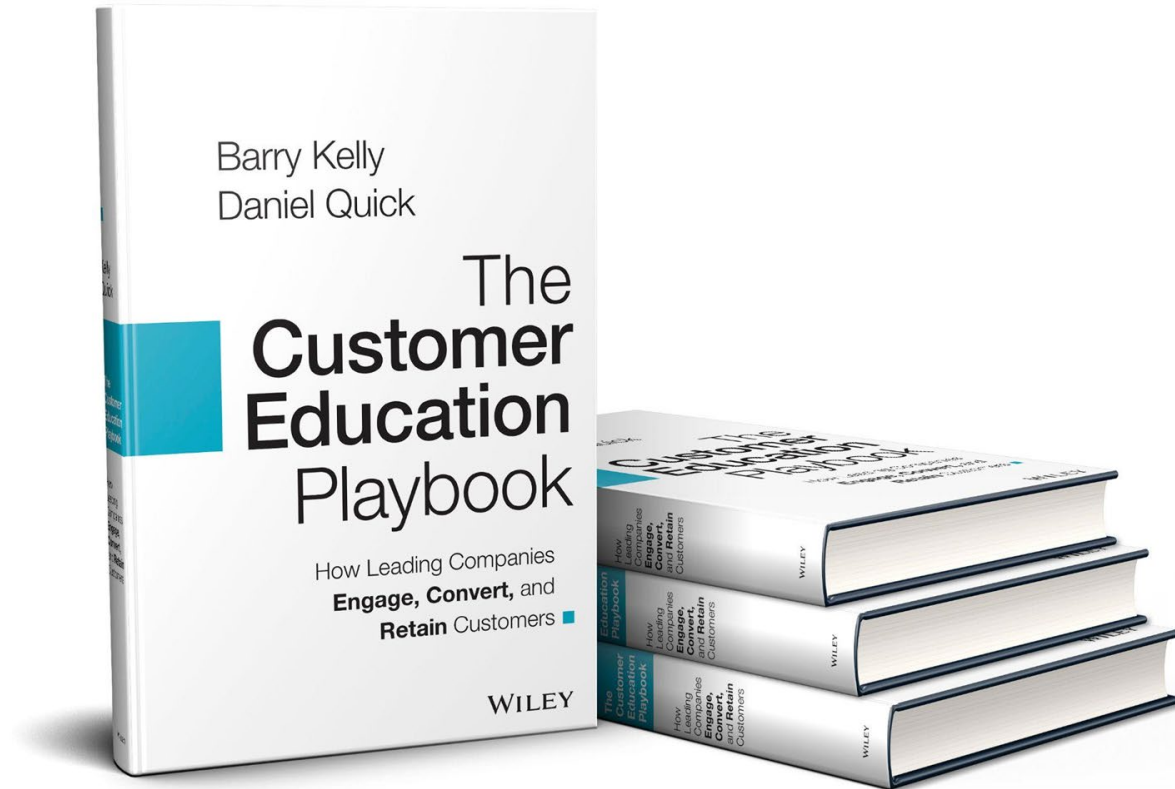


## Customer Education Certificate Program

Phase One: Strategy



# Coming Soon!



# QUESTIONS & DISCUSSION

# THANK YOU

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[cedma.org](http://cedma.org)