

# Building Effective Customer Education Programs

How Software Companies Can Use Online Learning to Augment  
Existing Customer Education Efforts

# Introduction

The customer success landscape has changed. Technology companies are producing more complex software, which can often overwhelm customers during the onboarding process.

As a result, it's common for these customers - whether it's a lawyer adopting a new solution to manage his legal practice or the doctor trying to learn new medical software while treating patients - to quickly abandon new platforms.

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If your company is building products that people rely on to boost workplace performance, you can understand the pain from both sides. It's a challenge to make all of your customers happy and successful, especially as your product evolves and your user base grows. It gets even more difficult as your product adds functionality, and with that comes new types of users as well.

To solve this, companies today are turning to customer success training, guided by the logic that well-versed customers who take full advantage of your product will also be more successful. Companies engaging their customers with up-to-date product information and success content are reducing churn, decreasing support costs and improving customer satisfaction. In short, customer training leads to customer retention.

However, since customer training is still in its early stages, there is little consensus on what training methods work best. Most of them are borrowed from old-fashioned internal training methodologies, which don't fully suit the needs of learners today.

Luckily, there is a better way to onboard customers and keep current users updated. In the following pages, we break down the basic tenets of customer training, outline four traditional training methods that companies use today, and present ways to supplement them with online courses to create more effective customer training programs.



## WHAT IS CUSTOMER TRAINING?

Customer training used to involve writing a 300-page user manual and delivering a week-long, on-site seminar for all new users. While these efforts explained, in intricate detail, all of the functionality of the product, they were also ineffective, difficult to scale and very expensive.



**Case in point:** During an executive briefing presented at an event by The Conference Board in Canada, online learning pioneer and Bluedrop founder Emad Rizkalla stated that a massive 85% of every dollar that goes to in-person training is spent delivering it.

Today's forward-thinking companies are using new approaches to customer training, including online webinars, knowledge bases, live chat, and online courses. These are just the tools, however.

Training is not just about the product.  
It's about getting the user to their  
desired outcome.

– **Lincoln Murphy, Founder and Principal at Sixteen Ventures**

Robust customer training programs can shorten what Murphy calls the "time to first value"-the moment when the user sees exactly what she can accomplish with your product. A marketing professional may get excited about creating an email campaign through an email software solution, for example, but she will be very excited when they improve their conversion rates after a simple change to the message.

Sam Mallikarjunan, Marketing Fellow at HubSpot and former Head of Growth at HubSpot Labs, a leader in inbound marketing and sales software, explains that teaching the user in this example to create an email campaign isn't good enough. To be truly engaged and satisfied, she must be able to run a successful email campaign. That includes knowing how to craft subject lines that urge people to open the email and write content that converts well, not just knowing what buttons to click in order to launch the campaign itself.

That's why HubSpot has invested a huge amount of time and effort into its customer training efforts. It not only teach its customer how to use various sales and marketing products, but it helps them improve the execution of their sales and strategies. Said another way, HubSpot is creating great users of its software, but even better inbound marketers who will remain customers for years. It's creating great inbound marketers, with the understanding that it will make them more successful customers.

HubSpot is so convinced that its HubSpot Academy makes customers more successful that they've made training a requirement, not an offering, for their largest engagements.





## HOW DO COMPANIES TRAIN NOW?

Successful companies have largely moved past the 300-page user manual, but many are still operating in the past when it comes to the way they deliver customer training. Let's examine four of the most common ways of delivering training, and learn ways to augment them with online learning.



## One-on-One Consulting

Most customer training efforts begin as one-on-one consulting. When products are new and only have a small number of users, white-glove onboarding and education makes sense.

Add to that the fact that customers appreciate one-on-one consulting. It makes them feel valued, and it can help them come up to speed very quickly, since all of their training is specially tailored to their needs.

One-on-one consulting can benefit the person overseeing the training as well, since it gives them an outstanding view of the real needs of customers. It's not surprising that the first customer trainer at many SaaS startups is the founder of the company. Teaching a new customer how to use your product is an excellent way to shape your product development roadmap.

However, one-on-one consulting has some downsides. It's expensive, and in many cases, you'll need a full-time employee just to handle the training for a single large customer account. Add in the travel costs and scheduling challenges, and one-on-one consulting soon becomes impossible to scale.

### TURN ONE-ON-ONE CONSULTING INTO A PROFIT CENTER



Companies like Zenkeep are changing the landscape of one-on-one consulting in the customer training space. They're delivering training through online courses, and many of them are simply charging customers extra for customized, face-to-face consulting services. This can turn consulting into a profit center for the company, rather than a financial liability.

Balancing online learning and one-on-one consultation is a scalable, more cost-effective approach to handling customer training and support needs. Online training materials can be used to teach customers common functions and success tips for your product, the kinds of concepts that all of your customers should know. Then, save the one-on-one consulting for particularly large or complicated customers that need the attention and are willing to pay for it.



## In Person Seminars (One-to-Many)

Another popular training method involves in-person, one-to-many seminars and training sessions. These carry the benefit of allowing a trainer to teach dozens or even hundreds of people at once.

This method is more scalable for large enterprise products that are rolled out to large user bases within a specific company. For example, if your product is geared toward salespeople working within large organizations, you might hold a group training session once a quarter to teach new users how to use the system together.

Large in-person seminars can also be useful for creating community among your customers, especially if you're training people from different companies simultaneously. Gathering them into a room encourages cross-pollination of ideas.

Unfortunately, when your customers are large companies that need new employees to use your system, you face a timing problem. New employees don't always start at the right time for a scheduled training session, which means your customers might have dozens or even hundreds of new employees who are entirely untrained on a mission critical software installation.

Furthermore, anyone who has ever sat in a large conference room for days listening to a corporate trainer explain how to input information into a system knows it's not the most effective way to learn a new skill. "Salespeople especially get antsy if they're sitting in their seats for too long," says Lynn Hunsaker, Chief Customer Officer ROI Strategist at ClearAction, a company that provides training and consulting for customer experience. She explains that it's better to teach students in short bursts on their own time, so they don't start aimlessly checking their email.

### INTEGRATE BLENDED LEARNING INTO YOUR TRAINING



Instructor-led learning is still a useful way to excite customers about your product, so don't feel pressured to eliminate them. Instead, treat in-person seminars as drill-downs on specific subjects, while driving customers to online courses to consume most of their training.

There are several advantages to doing this. First, the self-paced nature of online training means that people who need more time with certain subjects won't feel left behind as they might when attending a large seminar. Also, the combination of online training with in-person drill-downs makes for an effective approach to learning that allows you to engage customers on two fronts. This is called blended learning.





## Online Webinars

Webinars are a very popular form of training, simply because they offer many of the benefits of in-person training at a much lower cost. Because they don't require everybody to be in the same room, they eliminate the travel time and administrative hassles inherent to in-person training.

Validately, a software startup that helps companies test new products and prototypes, uses webinars effectively. Instead of focusing on how to use the product, its webinars give users tips on how to conduct better usability testing and moderate user sessions.

Unfortunately, webinars are also too often used as marketing tools. "Webinars are huge [among] SaaS [Software-as-a-Service companies]," Murphy explains. "When else do you get to have a 60 minute commercial?"

This is often a huge issue. Companies treat their webinars as 60 minutes of commercial time, while their audience grows bored or just returns to work. Effective webinars should provide value on their own. For example, a webinar teaching users how to be more successful operations managers is more valuable than a webinar that just teaches people how to use a specific task management tool.

In addition, webinars have a fundamental conflict that in-person training does not. While both suffer from the same scheduling challenges - everybody needs to be present to deliver the information live - webinars don't have the benefit of providing users with face-to-face interaction, thus lacking the collaborative opportunities and sense of community provided by both in-person seminars and online courses.

### USE WEBINARS TO SUPPLEMENT TRAINING, NOT DRIVE IT

You don't have to abandon webinars entirely. Having a monthly webinar to deliver short, informative pieces of content can be a great way to keep people up-to-date with your company. It also allows you to have a live Q&A session where people can ask questions or give feedback.

Don't rely exclusively on webinars for core training, though. A productive approach involves taking the material you might otherwise include in a webinar and turning it into an online class, which can engage learners and create the sense of community that webinars can't mimic. This will eliminate many scheduling difficulties and allow new customers to work at their own pace from anywhere in the world. You can also monitor learner progress and identify bottlenecks that can serve as the subject matter for a future, drill-down-style webinar.





## Written Documentation

Written documentation is still alive and well in the form of knowledge bases, FAQs, and in line 'help' documents. High-quality written documentation is searchable, well categorized, and easy for users to access. It can also be delivered right at the point of pain-when users are struggling with a particular aspect of your product, you have a small piece of helpful content available to help them learn how to accomplish their goal.

Unfortunately, most written documentation is dense, out of date, and not very engaging. Poorly written documentation means customers are more likely to call support when encountering a problem, rather than trying to repair it themselves.

Even when written documentation covers every foreseeable loophole and glitch, not all customers learn most effectively from reading printed material.

According to Neil Fleming, a teacher and researcher who observed over 9,000 classroom lessons before creating the VARK model of learning, people adhere to at least one of four key 'learning styles': visual, auditory, reading-writing, and tactile learning. Trying to teach a kinesthetic or auditory learner through written documentation is inefficient at best, thus opening the door for technology to enhance your product documentation.

### REPURPOSE YOUR WRITTEN DOCUMENTATION



A convenient aspect of your written documentation is that you likely have a lot of it and this kind of content is easy to update. Written documentation is also searchable, which makes it good for troubleshooting when users are stuck on a particular task.

However, it could be even more productive if you repurpose your documentation, reworking existing content into courses to use in your LMS.

You will very quickly begin to see a more informed customer base. An IBM study found that a group of online learners absorbed nearly 5x more material than an instructor-led group, so repurposing this written documentation in online course form gives customers a chance to train thoroughly before they even begin using your product



## GETTING STARTED WITH ONLINE LEARNING

When you find yourself spending more and more of your time giving the same talks and training, online courses may be the next logical step. Creating great courses requires an upfront investment of your time, but it will save you a far larger proportion of time and money in the long run.



**According to the University of Pennsylvania's Institute of Management and Administration (IOMA),**



**when they replace instructor-based training with online learning, where courses are generally 25-60% shorter.**

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Best of all, incorporating online learning doesn't mean getting rid of the training materials your company has already created. It simply adds an effective, measurable channel for keeping your customers happy, connected, and successful.

Customer success teams can create multimedia courses that learners complete at their own pace, build out thought-provoking assignments, see what customers have completed coursework to pinpoint where bottlenecks occur, and discover what topics are most often consumed. This is why DeMere thinks online training is the future of education. "It lets you teach the group but look at the analytics on an individual basis to make sure everybody is learning."

The goal is to find commonalities in that data to make your training courses relevant and effective for the majority of your users, who may have different learning styles and preferences. This means experimenting with rich text, video, audio, different kinds of assignments and other entertaining ways to convey learning. Luckily, there are best practices for creating engaging, useful online classes.

Hunsaker used to be a college professor, so she has significant experience creating effective curriculum. Now she creates online classes, because she feels the future of customer training lies in interactive, online learning content that students can review at their own pace. She offers the following suggestions for increasing the return on your online customer training courses.

## Tips for Creating Online Courses



### STRUCTURE IT CORRECTLY.

"Adults learn by connecting something new to something they already know about, so analogies are important," Hunsaker says. She recommends taking whatever topic you're trying to teach and breaking it down into a nugget of information, an analogy, and an example. This allows the customer to internalize the topic, see how it relates to them, and then see how it's applied in the outside world.



### MAKE IT INTERACTIVE.

The days of sitting passively in a lecture hall all day are gone. When she creates classes, she incorporates video, quizzes, images, text, and exercises. "Only about 10% of learning is verbal," she says, which may explain why long lectures are often ineffective. Adding tactile, interactive elements compels learners to absorb information.



### KEEP IT SHORT.

The best courses should also only be about 5 minutes long. Hunsaker explains that the most effective training is delivered in short, 5-minute nuggets that can be viewed separately but still build on each other. By chunking courses into small lessons or activities, it allows customers to take classes at their leisure, when they're ready to learn, and it encourages them to revisit concepts they didn't understand fully the first time.

Caty Kobe, Former Head of Training at FiverBee, agrees that keeping videos short is an effective tactic when creating classes to teach her clients how to be better community managers. "I put everything through my 'squirrel!' test," she says. It's important to keep lessons short so that clients don't get bored and distracted. When she joined FeverBee, she distilled the 6-week community manager training course into 5 hours of on-demand training, delivered in chunks of 8-10 minutes per session, in order to get clients up and running significantly faster.

When Willson of Zenkeep struggled to train his new employees to, in turn, train customers on Zenkeep's accounting software, he decided it was time for a more formal training program. He took the employee training and broke it apart into "belt levels" that employees could earn through taking online classes. The whitebelt level was then turned into a series of online classes, which lets Willson track his employees' progress to ensure they're adopting the concepts.

When creating online courses, it's important to recognize that while each of your customers may have slightly different needs, there will be some shared material that everybody needs to understand. Being able to engage learners via online training to deliver that material will let you spend more time with customers on their unique issues, and that will help scale your customer training efforts.

# Conclusion

As you can see, online learning is incredibly useful in augmenting your current training efforts, and ensuring your customers gain the knowledge they need to succeed. According to a study by WR Hambrecht+ Co, online learning improves retention by 25% to 60% over classroom learners.

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This is because online training allows customers to learn on their own schedules, reinforce topics until they're fully understood, and come up to speed quickly on the exact concepts they need to know.

Without online learning, scaling traditional customer training will become more of a challenge as your company grows. You can make it a smoother transition by incorporating new, smarter educational technology into your training programs as early as possible.

So, if you're concerned about reducing customer churn, increasing customer satisfaction, and making the most of both your training budget and existing training content, online customer education is the most viable option.

Whether used alone or in conjunction with other training methods, online customer education can help you create engaged, well-trained users who meet their product goals. It provides more effective, personalized education for your users by letting them work at their own pace, from any device, anywhere in the world.



**For more information** on how Northpass can help you reduce churn and keep customers satisfied, visit [Northpass.com](https://northpass.com).

#### Produced by Northpass

Special thanks to Lincoln Murphy, Sam Mallikarjunan, Nichole Elizabeth DeMere, Lynn Hunsaker, Dave Willson and Caty Kobe for their contributions.