

Learning  
Technology  
Use Case:

# Customer Education



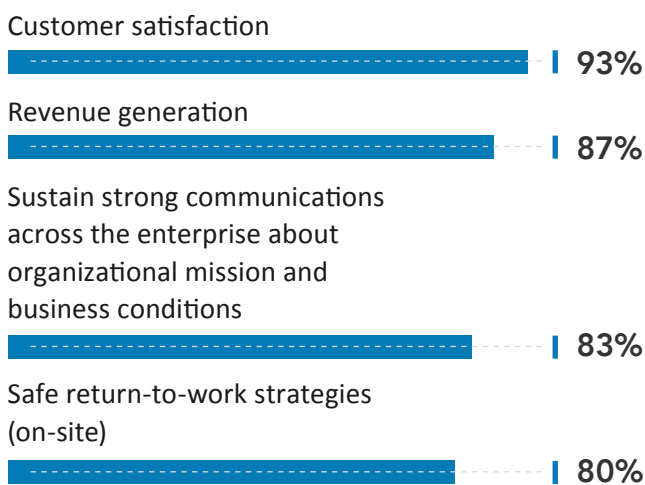
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## Current State

Organizations live and die by their customer experience. In Brandon Hall Group's *HCM Outlook Study*, customer satisfaction is by far the number-one business strategy as companies recover from the impact of the COVID-19 pandemic. The study also shows that improving the customer experience is the number-one business priority overall.

### Top 4 Post-Pandemic Business Strategies (Ranked 4 or 5 on a 5-Point Scale)



### Top 5 Business Priorities



Source: 2020 Brandon Hall Group, HCM Outlook Study

More companies are discovering that a big part of the customer experience is communication, support and training from the business. However, customer training is often regarded as an afterthought and add-on to the sale, and in many cases handled by functions outside learning. In many cases, it has more to do with “save the sale” than helping the customer.

**Nearly half the companies (45%) in Brandon Hall Group's *Extended Enterprise Learning Study* say they deliver training to customers.**



## Complexities

Training for internal audiences comes with a full set of challenges. Managing a process focused entirely on external audiences only exacerbates and extrapolate those challenges and adds a few new ones for good measure. Customer training difficulties often begin at the top; the process can be owned by the Sales function, Marketing, Education Services, Customer Success or even a Customer Experience department if it exists. These groups don't always have the same insights as the Learning function on what makes great training. Beyond that, customer training is typically delivered to widely diverse, dispersed audiences, leading to one of its biggest challenges: measuring effectiveness.

Another challenge presented by diverse learning audiences is that many organizations take a one-size-fits-all approach, pushing the same content with the same look and feel to everyone. For true customer engagement, companies must be able to

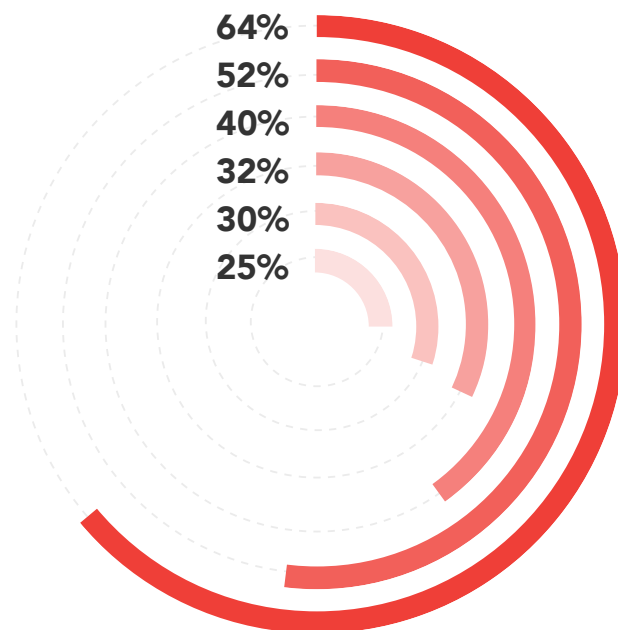
deliver personalized content and use targeted campaigns to drive engagement.

These challenges underscore why it makes sense to look to the Learning function

for solutions. Learning understands how to measure learning outcomes, understands what makes great training content and usually has the right technology to make it all happen.

### Customer Training Challenges

- Difficulty measuring effectiveness
- Content development
- Lack of the right technology
- Managing/securing intellectual property
- Cost structures
- Lack of insight into external groups



Source: 2020 Brandon Hall Group, Extended Enterprise Learning Study



## Consequences

Customer training can serve many needs for an organization. For the most part, the goals of customer training align very well with the overall goals of the entire customer experience.



**Increasing product adoption**



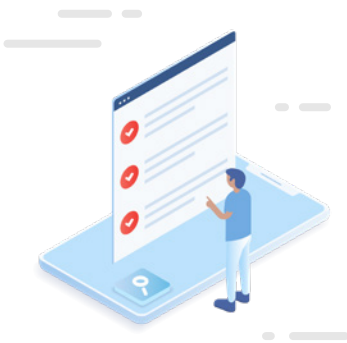
**Reducing client attrition/churn**



**Increasing brand loyalty**



**Increasing customer lifetime value**



Strong customer training ensures customers can quickly get up and running with their products, starting the relationship off on the right foot. Customers who received effective training can get the most from their products, which means they are more likely to remain customers. And, of course, customers rely less on help and support channels when they are well-informed about their purchases.

Brandon Hall Group's *Extended Enterprise Learning Study* found that companies that deliver customer training are recognizing multiple benefits:

### How Customer Training Helps the Business:

Increases awareness of products/services



Improves customer relations



Meets compliance requirements



Reduces training travel time



Maximizes client retention



Helps meet/exceed corporate objectives



Reduces training costs



Increases sales



Reduces client support interactions



Generates revenue



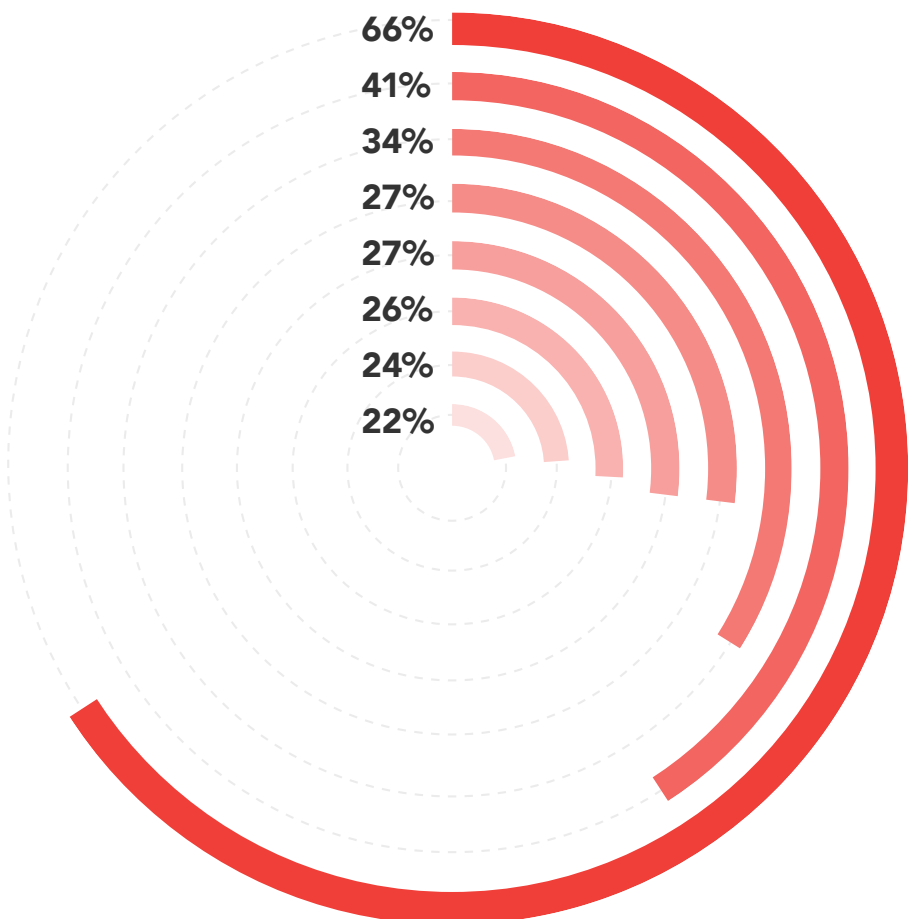
Source: 2020 Brandon Hall Group, Extended Enterprise Learning Study

These objectives are confirmed when we look at the benefits organizations say they achieved through their extended enterprise learning efforts. Many companies are increasing awareness of their products and improving customer relations, among other outcomes.

Overall, about 58% of companies that deliver customer training say they are either satisfied or very satisfied with the effectiveness of their efforts. A big driver of effectiveness, though, is technology. More than three-quarters of companies say that technology is the main reason for the effectiveness of their customer training. Most companies use an LMS for customer training.

## Systems Used for Customer Training

- Learning Management System
- Website
- Social/collaboration platform
- In-house learning system
- YouTube channel/video server
- SharePoint or other content management system
- Learning Content Management System
- Training software platform (other than LMS)



Source: 2020 Brandon Hall Group, Extended Enterprise Learning Study

## Critical Questions

Organizations that seek to improve the customer experience must address these key issues:

- How do you retain your top customers?
- How do you sustain customer satisfaction and reduce support inquiries?
- What metrics do you use to align product teams with sales?
- How do you keep customers invested in your products or services?
- Do you have the right technology in place to deliver engaging customer training?



## Brandon Hall Group POV

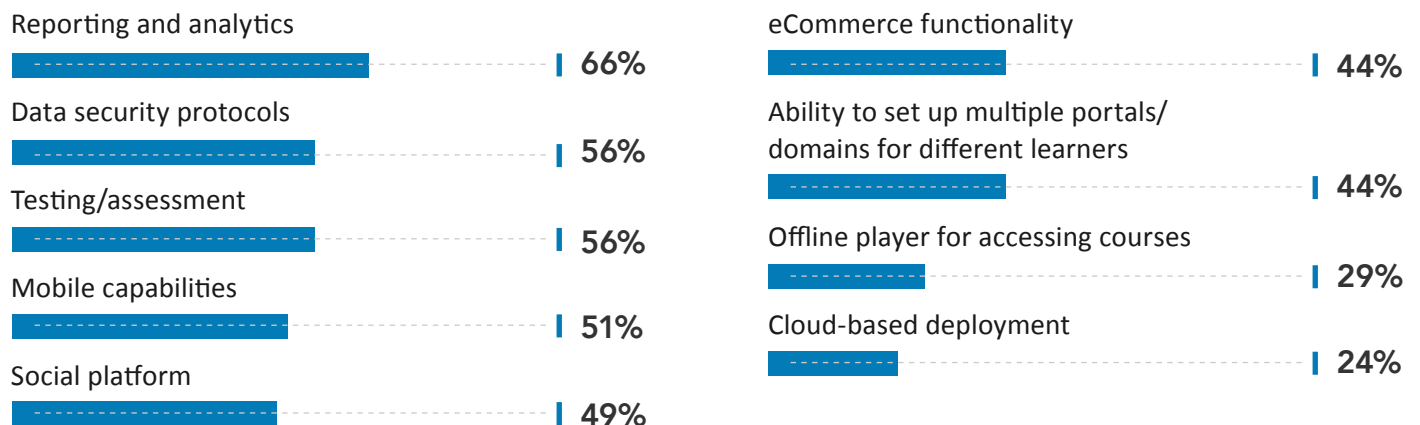
### Leveraging the Right Technology

Most companies that do any sort of customer-facing communication are likely to use a content management system (CMS), though not one designed specifically for learning. The biggest issue with this is that these systems are built to deliver relatively static experiences; pushing out documents, videos or other content for the customer to consume. This puts too much reliance on the customer to identify and request the training for themselves. A learning platform makes it easier to deliver the training a customer may need, when and where they need

it and make the training part of the customer experience, rather than something requiring additional effort.

Another challenge related to CMS platforms is that they don't provide insight into what customers are consuming and how they do so. This is critical to ensure the experience is effective and can be adapted if consumption patterns change. Brandon Hall Group's *Extended Enterprise Learning Study* found that reporting and analytics were the most important technology characteristics for delivering customer training.

### Most Important Technology Characteristics in an LMS for Customer Education



Source: 2020 Brandon Hall Group, Extended Enterprise Learning Study



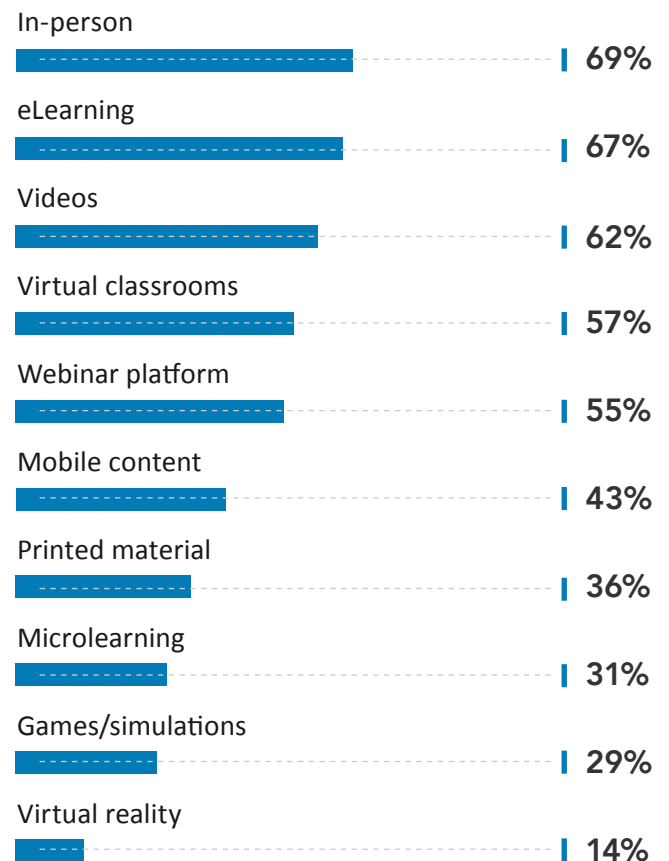
## It's All About the Experience

Having the right technology in place allows a company to provide a much stickier, engaging customer experience when it comes to training. In the data for technology characteristics, we see that social and mobile capabilities are important. These elements help create a better training experience and one that customers will want to engage with in the future as well.

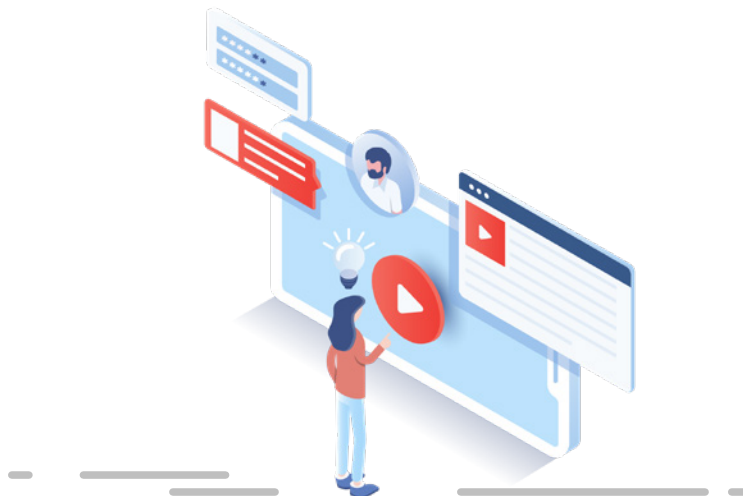
While Customer Experience and Sales professionals are mainly focused on engaging customers, they might not have the skills or technology to implement a training program at scale. They should partner with L&D teams and leverage their experience, skills and technologies.

While a great deal of customer training has traditionally occurred in-person, companies that say their processes are effective use a variety of modalities. This has become critical as the COVID-19 pandemic has put the brakes on most face-to-face training.

## Learning Delivery Modes Used for Customer Education



Source: 2020 Brandon Hall Group, Extended Enterprise Learning Study



### ■ Training is the Brand

The customer experience is also very heavily reliant on the right branding. It can be difficult to keep branding consistent while delivering unique experiences to a wide variety of customers. Here again is where the right learning-focused technology helps. A single platform that allows for multiple variations of themes, branding and experience is critical. The right technology provides the ability to create customized, branded experiences without overburdening admins and content creators.

The biggest advantage to this approach is scalability. Using customer feedback, profiles and activity, the system can deliver the right training to the right audiences when and where they need it, while providing the proper look and feel for each group. This level of personalization enhances the customer relationship and provides opportunities to engage them in new sales opportunities.



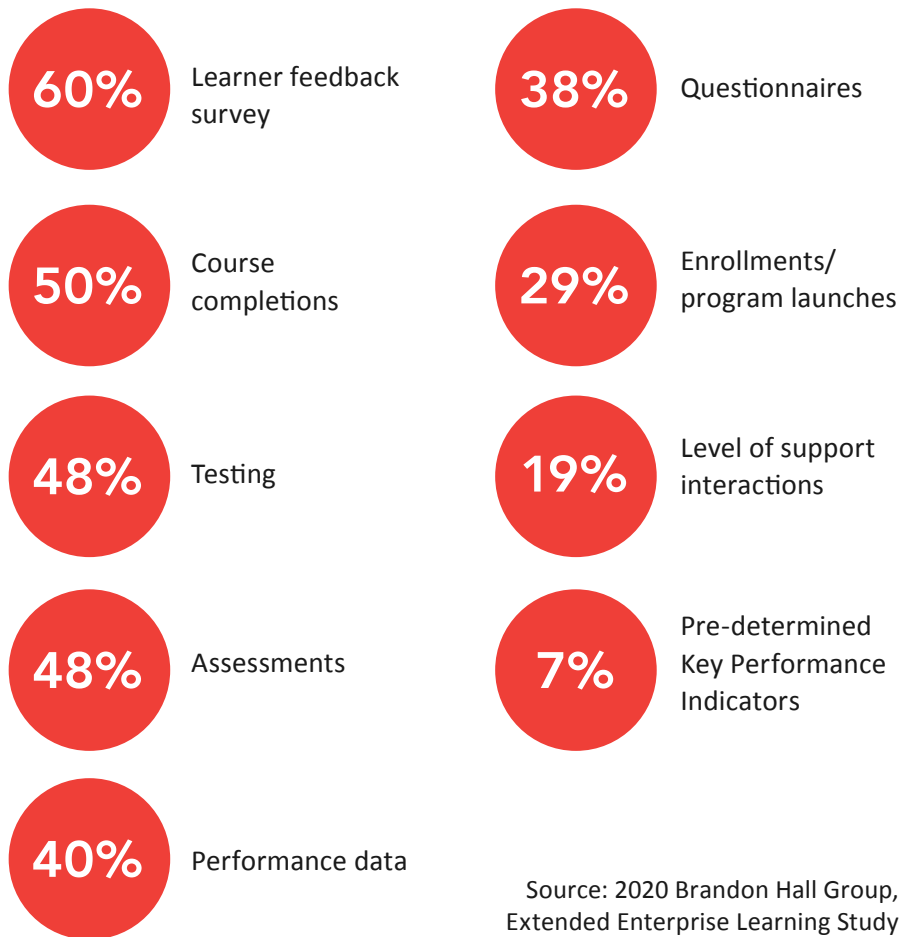
## Track, Measure, Repeat

No data is more valuable to an organization than customer data. Their training is a rich source of data. Companies gain insight into how they use products as well as their future wants and needs. A system that can track the consumption of customer training and provide insights is critical. As we have seen in the data, measuring effectiveness is the top challenge for companies and reporting/ analytics is the number-one technology need.

This highlights the importance of deriving as much data as possible from customer training. It is not always easy and many of the customer training methods companies employ do not really have the mechanisms in place to do it.

With learning-focused technology, there are several ways to collect different kinds of data:

## Methods Employed to Measure Customer Training



The data collected by the learning platform can then be integrated with data from other systems throughout the business; a content management system, customer relationship management system or

anything else. This lets companies begin to glean deeper insights based on customer interactions with training and how that relates to things such as client retention, upselling, support usage and more.



## Key Takeaways

- The customer experience has taken on heightened importance in the face of a disrupted, volatile economy.
- Customer training can no longer be looked upon as ancillary to the product but should be seen as an indispensable part of the sale.
- Done properly with the right strategy and technology, customer training can generate revenue through the sales process and reduce costs from a decreased need for support services.





## Authors and Contributors



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## About Adobe Captivate Prime

Train employees, partners, and customers effectively with a modern digital learning platform. Deliver a personalized learning experience that encourages discovery and consumption. Take advantage of rich analytics that enable effective decision making. Embed learning in the flow of work by integrating the LMS with other enterprise platforms via a robust API framework.



To learn more, please visit:  
[www.adobe.com/products/captivateprime](https://www.adobe.com/products/captivateprime)



For inquiries, contact:



[captivateprimesales@adobe.com](mailto:captivateprimesales@adobe.com)

## About Brandon Hall Group

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