Customer Education Guide

The 2024 CE Pro Playbook

7 Must-Have Plays to Pivot from Cost-Center to Revenue-Driver



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First thing's first

Let’s get started with one of our favorite things: a quiz. Are you ready?

How many corporations in North America offer some level of customer education?

- 20%
- 45%
- 75%
- 100%

The answer is... **C**.



Luckily, there are no ‘wrong’ answers here—they all still grant you access to this playbook. If you answered D, you’re the CE champion we need. While we’re not quite at 100%, we know we can get there.

Within the past decade alone, the speed at which companies adopted customer education as a must-have rather than a nice-to-have has taken our industry by storm. As John Leh recently noted,

> **“Over 75% of North American corporations offer some level of customer education. Why is customer education so popular? As I’ve said for years, it is measurable. It’s also easy to observe and prove that customer education helps improve business performance.”**

What does that mean? You’re in good company.

Momentum & Maturity

More and more customer educators have shared their experiences, challenges, and insights into what sets a CE strategy up for success. And companies have taken note that they can’t keep their competitive edge if their customers aren’t trained (alas, retained).

But not only has the industry grown rapidly in a decade, the world around it has, too. Whether it’s shifting CS models, digital-first experiences, AI advancements, economic shake-ups, and so the list goes on—one thing’s for sure: advice can get stale pretty quickly. Especially with the pressure on profits: your playbook has to adapt to prove impact first.

While ‘ideal’ program advice printed on the pages of a book 5-10 years ago may still ring true, the practicality hasn’t kept up.

Spoiler: That’s why we created this playbook.

The leap from cost-center to revenue-driver

We're going to get straight to it: 75% of companies doing 'some sort of customer education' implies that within that bucket, there's a massive opportunity for growth.

After talking to thousands of customers over the past decade, there's been a common trend in the past year. They've outgrown 1.0 approaches, or are feeling that they're on the cusp of something bigger. Think content 'everywhere', lackluster analytics, off-brand experiences, missed monetization, 'one-size-fits-all' learning journeys, and a slew of other hang ups that stand between you and the potential your program could tap into.

We're seeing a brewing shift from what we consider CE 1.0 to CE 2.0, and we see CE pros just like you ready to jump into that journey.

How CE drives impact:

Enable personalized experiences across multi-format types and multiple users—keeping both educators and customers in one learning loop

Reduce CS overload, increase CS time for strategic conversations, and create scaled & automated experiences

Transform churn management from reactive to proactive, creating a consistent experience across the entire journey

Turn your educational content and curriculum into a revenue generating product of its own—a product that drives more success with a product (lots of product, huh?)

Ultimately, cement CE's seat at the table by connecting learning to revenue—proving that trained customers reduce support tickets, increase NPS, reduce churn, increase TCV, and ultimately, safeguard your hard-earned logos and grow revenue.

Sounds great in theory, right? The incredible potential of a well-oiled CE machine is undeniable. After all, we love home makeover, car restoration, and cooking shows for a reason—they skip to the good part pretty fast.

7 Plays Built for Reality over Rhetoric

In this playbook, we promise we won't fast-forward to the good part without showing you how you can get there. While your program may not be fully revamped in 30 minutes, you'll walk away with 8 actionable plays in the same time you could have watched an episode of your favorite show.

Whether you're dipping your toes into customer education, or you're ramping up to monetize and scale, this playbook goes at your own pace.

PLAY 1 Hyperspeed Time-to-Value

PLAY 2 Prevent Churn with Product Training

PLAY 3 Create Champions that Retain & Expand TCV

PLAY 4 Syndicate Content for Extended Reach

PLAY 5 Certify Users for Advocacy and Loyalty

PLAY 6 Fund Your Own Growth With Monetization

PLAY 7 Scale Efficiency with Automation & AI

Given we have a passion for learning just like you, this playbook will offer a repeatable framework for each play that's easy to digest. Consider this your blueprint—something you can come back to when you need to get back on course or test out something new to take you to the next level. Each play will cover:

- Why CE pros need this play
- How CE pros can take action—tactics, tips, & tricks
- Examples from pros just like you
- Tech Take on how you can leverage your tools to get it up and running

Jump into your first play →

PLAY 1

Hyperspeed time to value

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PLAY 1

Hyperspeed time to value

Accelerating Time to Value Through Onboarding: A Strategic Playbook for Customer Education

Why Is Customer Education Critical During Onboarding?

Facilitating Rapid Product Adoption:

Customer education, when seamlessly integrated into the onboarding process, significantly reduces the learning curve associated with new products or services. This facilitates rapid adoption, enabling customers to quickly leverage the full suite of features and capabilities, thereby accelerating the realization of value.

Enhancing Customer Engagement and Satisfaction:

Educational content tailored to the onboarding phase can significantly enhance customer engagement by providing clear, actionable insights into product utilization. This heightened engagement not only boosts satisfaction rates but also fosters a positive initial experience with the brand.

Reducing Support Costs and Friction:

A well-structured customer education program during onboarding can preempt common questions and challenges, reducing the reliance on support services. This proactive approach minimizes friction, ensuring a smoother customer journey and optimizing resource allocation.

Building a Foundation for Continuous Learning and Growth:

Initiating customer education early in the customer journey establishes a foundation for continuous learning, encouraging customers to explore advanced features and functionalities over time. This ongoing engagement can lead to higher product utilization, increased loyalty, and opportunities for upselling and cross-selling.

Cheat Sheet: Tips to Get Started

Assess Customer Needs and Expectations:

- Conduct customer research to understand the common challenges and questions new users face.
- Tailor onboarding content to address these needs, ensuring relevance and impact.

Develop Targeted Educational Content:

- Create a variety of content formats (videos, articles, tutorials, webinars) to cater to different learning preferences.
- Focus on delivering concise, actionable information that empowers customers to start using the product effectively.

Integrate Education into the Onboarding Flow:

- Seamlessly incorporate educational content into the onboarding process, using automated emails, in-app messages, and personalized learning paths.
- Leverage an LMS like Skilljar to facilitate easy access to educational resources and track engagement.

Enable Self-Service and On-Demand Learning:

- Provide customers with on-demand access to educational content, allowing them to learn at their own pace and revisit materials as needed.
- Implement self-service resources such as FAQs and knowledge bases to further support autonomous learning.

Measure Impact and Gather Feedback:

- Track key metrics such as time to first value, product adoption rates, and customer satisfaction scores.
- Regularly solicit feedback to refine the onboarding experience and educational content.

Iterate and Personalize the Onboarding Experience:

- Use data and customer insights to continuously improve and personalize the onboarding process.
- Explore opportunities to segment customers and tailor onboarding paths based on their specific needs or industry.

Tech Tips: Technical and Strategic Considerations for Educational Onboarding

Streamlined Content Delivery and Tracking:

- Setup: Employ an LMS that integrates with your product ecosystem to deliver personalized onboarding experiences and track progress.
- Outcome: A tailored, efficient learning journey that accelerates time to value.

Analytics and Performance Monitoring:

- Setup: Utilize analytics tools to monitor engagement with educational content and its impact on onboarding success.
- Outcome: Insights into content effectiveness and opportunities for optimization.

Feedback Loops and Continuous Improvement:

- Setup: Implement mechanisms for gathering real-time feedback during the onboarding process.
- Outcome: Enhanced content and strategies based on direct user input, fostering a customer-centric approach to onboarding.

Expected Outcomes:

- Accelerated time to value through rapid product adoption and proficiency.
- Enhanced customer satisfaction and engagement from the outset.
- Reduced support costs and increased operational efficiency.
- A strong foundation for continuous learning and customer retention.

By prioritizing customer education during the onboarding stage, you can significantly reduce the time it takes for customers to realize value from their products or services. This strategic playbook provides a comprehensive framework for embedding educational initiatives into the onboarding process, ensuring a seamless, informative, and engaging experience for new customers.



Ready for some inspiration? Here's how Automox made the leap

AUTOMOX

Who

Automox

Industry: IT operations

Headquarters: 100% distributed

Integrations:
Salesforce

> "This is my first time working as an LMS Admin. I was able to get our learning portal up and running by taking courses in Skilljar Academy. I think this ease of use is a huge advantage for Skilljar."
> — Sara Anderson, Customer Education Manager

Challenge

- With exponential growth, 1:1 onboarding, support, and training weren't enough
- Automox needed a scalable solution to improve onboarding and increase usage of their more complex product features

How they optimized

- Automox rolled out with an onboarding program and have added more feature-oriented courses each month to allow time to gather feedback
- They completed their implementation in under 90 days

3X new user enrollment in first months

Customer Success can now facilitate deeper discussions

75% reduction in manual onboarding training hours

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PLAY 2

Prevent Churn with Product Training



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PLAY 2

Prevent Churn with Product Adoption

Elevating Product Adoption and Feature Activation Through Customer Education: A Lifecycle Approach

Why Focus on Customer Education for Product Adoption?

Tailoring Learning to Diverse Customer Roles:

Customer education that considers the unique needs and challenges of different roles within an organization ensures that each user finds relevant, actionable content. This tailored approach accelerates the adoption process by directly addressing specific use cases and pain points.

Highlighting Value Across the Product Lifecycle:

Continuous education helps customers discover and understand the full spectrum of product features, including those that may not be immediately apparent. By showcasing the utility and benefits of both new and core features, education drives deeper engagement and product loyalty.

Facilitating Feature Activation and Proficiency:

Educational initiatives empower users to activate and proficiently use features, transforming passive users into active, proficient product advocates. This not only enhances the user experience but also contributes to the overall success of the product for customers.

Supporting Continuous Learning and Adaptation:

A lifecycle approach to customer education fosters an environment of continuous learning, encouraging users to explore advanced functionalities and adapt to product updates seamlessly. This ongoing engagement keeps the product relevant and maximizes customer value over time.

Cheat Sheet: Tips to Get Started

Identify Learning Needs Across Customer Segments:

- Analyze user data and feedback to understand the diverse roles and learning requirements within your customer base.
- Segment users based on roles, industries, or experience levels to tailor educational content effectively.

Develop Role-Specific Educational Content:

- Create a variety of content formats (tutorials, case studies, interactive guides) designed to resonate with different user personas.
- Focus on practical applications and real-world scenarios that highlight the value of features for each role.

Integrate Education Throughout the Customer Journey:

- Embed educational touchpoints at critical stages of the customer journey, from onboarding to renewal.
- Utilize automated workflows and personalized learning paths to deliver timely, relevant content.

Leverage Technology for Personalized Learning Experiences:

- Employ an LMS like Skilljar to facilitate scalable, personalized education across the customer lifecycle.
- Use data analytics to track engagement and adjust content based on user behavior and feedback.

Promote Feature Discovery and Experimentation:

- Encourage users to explore and experiment with features through gamification, challenges, and rewards.
- Highlight success stories and best practices to inspire adoption and creative use of features.

Measure Impact and Refine Strategy:

- Monitor key metrics such as feature adoption rates, user proficiency levels, and customer satisfaction.
- Continuously gather user feedback to refine educational content and delivery methods.

Tech Tips: How to Operationalize with Your Tools

Dynamic Content Delivery and Adaptation:

- Setup: Implement a dynamic LMS that supports the creation and distribution of personalized, role-specific content.
- Outcome: A responsive education platform that evolves with customer needs and product developments.

Analytics for Insight-Driven Education:

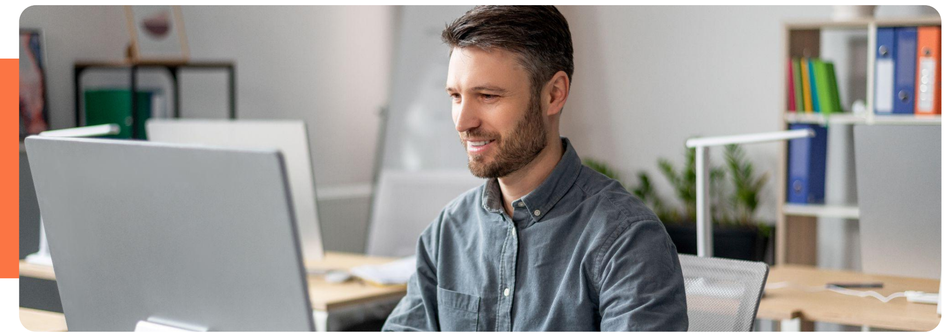
- Setup: Utilize comprehensive analytics to understand how different segments engage with educational content and features.
- Outcome: Data-informed decisions that enhance content relevance and effectiveness.

Community Engagement and Peer Learning:

- Setup: Foster a community platform where users can share experiences, ask questions, and learn from peers.
- Outcome: Enhanced peer support, accelerated learning, and increased product advocacy.

Expected Outcomes:

- Increased product adoption and feature activation across diverse customer roles.
- Enhanced user proficiency and satisfaction, leading to higher retention rates.
- A culture of continuous learning and adaptation, ensuring long-term product success and customer value.



By embracing a customer education strategy focused on product adoption and feature activation, you can guide users through a personalized learning journey that not only highlights the immediate value of features but also supports their evolving needs throughout the customer lifecycle. This strategic approach ensures that every user, regardless of their role or experience level, can fully leverage the product's capabilities, driving both individual and organizational success.

Ready for some inspiration? Here's how Zywave increased product usage 200%

ZYWAVE

Who

Zywave

Industry: Insurance Technology

Headquarters: Milwaukee, WI

Integrations:
SSO
SAML
Webex

> **"I wasn't happy with other learning management systems we used. I found them to be outdated and lacking in customization and integration capabilities resulting in a poor user experience. We were able to get Skilljar up and running in less than four months -- which was the best decision ever. "**
> **— Eryn Baudo, Instructional Designer**

Challenge

- Previous LMSs would not scale as Zywave made seven corporate acquisitions
- With four business lines, Zywave needed the ability to segment groups and provision training

How they did it

- Created a seamless end-user experience with SSO
- Built flexible training option based on job roles, specific products, or workflows
- Partnered closely with Skilljar to find solutions to their specific needs and use cases

200% increase in product usage

71% increase in course registrations

51% increase in users

skilljar

PLAY 3

Create Champions that Retain & Expand TCV

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PLAY 3

Create Product Champions that Expand TCV

Why Prioritize Customer Education for Retention and Expansion?

Enhancing Product Value Perception:

Education elevates the perceived and actual value of your product by demonstrating its depth, flexibility, and potential to solve complex problems, thereby solidifying the customer's investment decision.

Building Customer Confidence and Competency:

Well-designed educational programs empower customers with the knowledge and skills to use the product more effectively, leading to higher satisfaction rates and a deeper commitment to your solution.

Identifying and Addressing Churn Risks Early:

Continuous education provides insights into customer engagement and proficiency levels, enabling you to proactively address potential churn risks with targeted interventions.

Fostering Advocacy and Expansion:

Educated customers are more likely to become brand advocates, sharing their positive experiences within their networks. This advocacy naturally leads to expansion opportunities through referrals, testimonials, and case studies.

Cheat Sheet: Tips to Get Started

Segment Customers Based on Usage and Needs:

- Analyze customer data to segment users by product usage patterns, industry, role, and proficiency level.
- Tailor educational content to address the specific challenges and opportunities within each segment.

Create Engaging, Outcome-Oriented Content:

- Develop educational materials that focus on achieving tangible business outcomes, showcasing how your product can solve real-world problems.
- Utilize a mix of formats such as video tutorials, interactive simulations, and live webinars to cater to diverse learning preferences.

Embed Education in the Customer Experience:

- Integrate educational touchpoints throughout the customer journey, from onboarding through renewal.
- Use automation and AI to deliver personalized learning recommendations at critical moments.

Leverage Education for Customer Success and Support:

- Equip Customer Success Managers with educational resources to help them guide customers more effectively.
- Integrate educational content into support channels to enable customers to self-serve, reducing support tickets and increasing satisfaction.

Implement Feedback Loops and Continuous Improvement:

- Collect and analyze feedback on educational content and its impact on customer satisfaction and product usage.
- Regularly update and refine educational offerings based on customer feedback and product updates.

Identify and Nurture Expansion Opportunities:

- Use education as a platform to introduce customers to advanced features, new products, or services that could add value to their existing solutions.
- Recognize and reward customer achievements and milestones with certifications, badges, or access to exclusive content, encouraging further engagement and loyalty.

Tech Tips: How to Operationalize with Your Tools

Personalized Learning Paths and Analytics:

- Setup: Utilize an LMS that supports personalized learning paths and detailed analytics to track engagement and learning outcomes.
- Outcome: Enhanced understanding of customer engagement levels, enabling targeted interventions to reduce churn and identify expansion opportunities.

Community and Peer-to-Peer Learning:

- Setup: Foster a community platform where customers can exchange knowledge, solve problems collaboratively, and share success stories.
- Outcome: Strengthened customer relationships, increased product stickiness, and a vibrant community that drives retention and identifies expansion leads.

Customer Success Integration:

- Setup: Seamlessly integrate educational content and insights into Customer Success workflows to inform engagement strategies.
- Outcome: Proactive, informed customer interactions that enhance satisfaction, reduce churn, and uncover opportunities for upselling and cross-selling.

Expected Outcomes:

- Increased customer retention through improved satisfaction, confidence, and product mastery.
- Reduction in churn by identifying and addressing customer needs proactively.
- Unlocked expansion opportunities through education advocacy and deepened product engagement.

By strategically embedding customer education within the customer lifecycle, you can not only enhance retention and reduce churn but also lay the foundation for meaningful expansion. This playbook provides a comprehensive approach to leveraging education as a tool for nurturing a loyal, engaged customer base ready to explore the full breadth of your product ecosystem.

PLAY 4

Syndicate Content for Extended Reach



PLAY 4

Harnessing Content Syndication in Customer Education: A Strategic Framework for Broadening Reach and Revenue

Why Incorporate Content Syndication?

Expanding Educational Reach:

Course syndication allows you to distribute their educational content beyond their immediate digital premises, enabling access to a broader audience. This expanded reach not only enhances brand visibility but also opens new channels for customer acquisition and engagement.

Strengthening Brand Presence Across Platforms:

By syndicating courses across partner platforms, you can reinforce their brand presence in the market, making their educational content more accessible and increasing touchpoints with potential and existing customers.

Leveraging Partnerships for Market Penetration:

Strategic partnerships for course syndication can serve as a powerful lever for penetrating new markets and demographics, offering a pathway to untapped customer segments.

Generating Additional Revenue Streams:

Course syndication introduces opportunities for additional revenue through licensing fees, revenue-sharing models, and expanded sales of related products or services.

Life before Content Syndication vs. Life after Content Syndication

Without Syndication

- Share individual training assets and/or SCORM packages with a content consumer
- The content consumer uploads each individual asset/piece of content to their LMS
- The content consumer collects all enrollment completion data and feedback data to send to you

  If updates to any content or course material is required, the process has to start from scratch

With Syndication

- Enable content syndication and share entire course package with a content consumer
- The content consumer uploads entire course package to their LMS of choice
- All enrollment/completion data is available within your Academy analytics and the other LMS
- Edits to any of the content or course materials will be updated automatically and synced to each learner's instance

Cheat Sheet: Tips to Get Started

Assess Your Course Portfolio:

- Conduct a comprehensive review of your existing course materials to identify high-demand, syndication-friendly content.
- Ensure that the content aligns with potential syndication platforms and partner audiences.

Identify Potential Syndication Partners:

- Whether it's internal, customer, or partner's that need access to your content—get clear on the use case
- Evaluate the compatibility of potential partners in terms of content delivery, audience overlap, and strategic goals.

Negotiate Syndication Agreements:

- Establish clear terms for content syndication, including licensing arrangements, revenue-sharing models, and intellectual property rights.
- Define the scope of the partnership, including content updates, branding guidelines, and performance tracking.

Optimize Content for Syndication:

- Adapt your courses to meet the technical and branding requirements of partner platforms.
- Consider localization or customization needs to maximize relevance and engagement across diverse audiences.

Launch and Monitor Syndicated Offerings:

- Coordinate with partners for the launch of syndicated content, ensuring alignment with marketing and promotional activities.
- Implement tracking mechanisms to monitor engagement, performance, and revenue generation across syndicated platforms.

Gather Feedback and Iterate:

- Solicit feedback from partners and learners to gauge the effectiveness of syndicated content.
- Use insights to refine content, adjust syndication strategies, and explore new partnership opportunities.

Tech Tips: How to Operationalize with Your Tools

Seamless Integration with Partner Platforms:

- **Setup**: Ensure that your LMS or content management system supports efficient syndication and integration with partner platforms.
- **Outcome**: Smooth, consistent delivery of educational content across multiple channels.

Performance Tracking and Analytics:

- **Setup**: Leverage analytics tools to track engagement, completion rates, and revenue generation from syndicated content.
- Outcome: Data-driven insights for optimizing content and syndication strategies.

Marketing and Promotional Alignment:

- **Setup**: Collaborate with syndication partners on co-marketing efforts to maximize visibility and enrollment.
- Outcome: Enhanced promotional reach and increased enrollment in syndicated courses.

Expected Outcomes:

- Broadened educational reach and increased brand visibility across platforms.
- Strengthened market presence and access to new customer segments.
- Additional revenue streams through diversified syndication models.

Syndication In Real Life

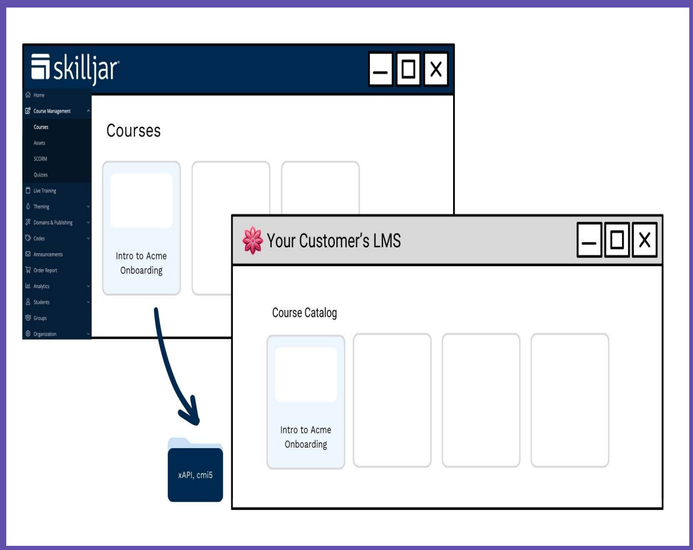
“Content Syndication is a game-changer for us at Visier. It's a fantastic win-win–for me and our customers. I'll be able to significantly grow my learner base, reaching those we couldn't before.

Embedding our Visier courses right into our customers' LMSs is nice but more importantly it's also a direct boost to our revenue, as we sell our courses. And for our customers? It's all about making learning more accessible.

We're bringing education to them, in a familiar environment, which really helps them engage, grow, and succeed. It's a big step forward for everyone involved."

-Debbie Smith, VP of Visier University, President of Customer Education Management Association (CEdMA)





PLAY 5

Certify Users for Advocacy and Loyalty

PLAY 5

Certify Users for Advocacy and Loyalty

The strategic inclusion of certifications within customer education programs represents a pivotal shift towards enhancing customer engagement, loyalty, and revenue generation. As encapsulated by industry leaders, the value of certifications extends beyond mere knowledge assessment; it's a vehicle for professional advancement, brand advocacy, and market differentiation.

Clarity Corner: Certificate v Certification

Before we dive into certification, let’s address a hot topic in Customer Education.

Certificate

A certificate is typically a document provided to a learner upon the completion of a course or a series of courses.

It serves as proof that the individual has completed the specific educational or training content outlined in the course.

Certificates are often used to recognize the achievement of the learner and can be based on simply completing the course or upon achieving a certain score in a final assessment or quiz.

Certification

A certification, on the other hand, is generally a more formal recognition of a learner's expertise or proficiency in a specific area or skill set.

Certifications often require the learner to pass a comprehensive exam or meet certain professional standards or criteria. They may also require ongoing education or re-certification to maintain the status.

Certifications are commonly recognized in professional industries and can be critical for career advancement or maintaining professional licenses.

Why Incorporate Certifications?

Creating Recognized Professional Value:

Certifications serve as a tangible recognition of skill proficiency and knowledge acquisition, enhancing the professional stature of learners. By offering certifications, you can not only elevate the perceived value of their educational content but also empower customers to advance their careers.

Enhanced Product Expertise and Usage:

Certifications ensure customers gain a comprehensive understanding of your product or service, fostering better utilization and leveraging of its features. This not only leads to higher satisfaction but also amplifies success with the product. A study by TSIA underscores the impact of effective training and certification programs on increased product usage and engagement, reinforcing the link between knowledge and product mastery.

Increased Customer Loyalty and Retention:

Investing in certification reflects a deep commitment to your product, translating into long-term loyalty and reduced churn. Research by Bain & Company corroborates this, showing that heightened customer education and engagement significantly boost retention rates. Customers who undertake the journey to certification often exhibit a stronger allegiance to the brand, diminishing the allure of competitors.



Cheat Sheet: Tips to Get Started

Step 1: Setting the Stage

Align Goals with Business Strategy

- Objective: Define clear business goals for the certification program.
- Action: Collaborate with stakeholders to align the certification program with overarching business objectives, such as enhancing product adoption, improving customer retention, or establishing a competitive edge in the market.

Step 2: Crafting Your Blueprint

Designing the Curriculum

- Objective: Develop a comprehensive and engaging curriculum for the certification program.
- Action: Work with instructional designers and subject matter experts to create a curriculum that not only educates but also engages learners. Include a mix of learning methods such as self-paced courses, interactive modules, and assessments.
- Bonus: This is where the use of AI can come in handy—take a crawl, walk, run approach and use your best-performing courses to inspire curriculum.

Step 3: Execution and Enhancement

Launching the Program

- Objective: Successfully roll out the certification program to your target audience.
- Action: Implement a robust marketing strategy to promote the program. Utilize various channels like social media, email campaigns, and partner networks to increase awareness and enrollment.

Measuring and Refining

- Objective: Continuously improve the program based on feedback and performance data.
- Action: Use analytics tools to track engagement, completion rates, and learner feedback. Regularly update the content and structure of the program based on these insights to keep it relevant and effective.

Step 4: Establish Community & Revenue

Building Community and Advocacy

- Objective: Foster a community of certified professionals and leverage them as brand advocates.
- Action: Create exclusive groups or forums for certificate holders, encourage sharing of digital badges, and spotlight success stories to nurture a community of skilled advocates.

Dipping Into Monetization

- Objective: Begin to ‘self-fund’ your CE program, using certifications as a first step
- Action: Skip to the next play to learn all about dipping your toes into monetization.

Tech Tips: How to Operationalize with Your Tools

Implementing Secure Assessments:

- Setup: Utilize robust LMS features for secure, proctored exams to maintain the integrity of the certification process.
- Outcome: Reliable certification that employers and professionals trust.

Managing Certifications and Renewals:

- Setup: Track certification status and renewal dates within your LMS to facilitate ongoing engagement.
- Outcome: Continuous learning and skill validation among certified professionals.

Integrating with Professional Networks:

- Setup: Enable badge or certification sharing on professional networks like LinkedIn.
- Outcome: Increased visibility for both the learner's achievements and your brand.

Key Actions:

- Learner Support: Provide comprehensive resources and support to help candidates prepare for certification assessments.
- Market Alignment: Continuously align certification offerings with evolving industry standards and employer needs.
- Community Building: Foster a community of certified professionals to enhance networking, learning, and brand advocacy.

Expected Outcomes:

- Enhanced customer engagement and loyalty through recognized professional development.
- Differentiated market position through high-value certification offerings.
- Increased revenue streams from certification enrollments and renewals.

Incorporating certifications into customer education programs is a strategic move that benefits both the organization and its customers. By providing a structured path to professional advancement, you can deepen customer engagement, differentiate your offerings, and open new revenue channels. This strategic blueprint offers a comprehensive approach to designing, implementing, and scaling a successful certification program.



Ready for some inspiration? Here's how Procore made the leap

PROCORE®

Who

Procore

Industry: Industrial Manufacturing Software
Headquarters: Carpinteria, CA

> Skilljar enables our customers to easily go through onboarding at their own pace and allows us to deliver training in an easy-to-use and intuitive environment "
> — Director of Documentation and Certification

Challenge

- Needed an efficient and scalable approach to onboarding new clients
- Customer Success team was spending countless hours scheduling training

Certification Solution

- Built interactive, self-paced training with hand-on labs
- Created a large ecosystem of Procore Certified Users
- Provided a seamless experience with Procore, incorporating branding and an SSO connection

Granted more than 700,000 certifications with >5M quizzes passed

Launched a LinkedIn community of 2,200+ certified users

Developed 5 job-related task simulators

skilljar

PLAY 6

Fund Your Own Growth with Monetization

PLAY 6

Monetize Courses for Extended Reach

Why Shift Towards Monetization?

Creating Sustainable Revenue Streams:

Diversifying income sources ensures stability and resilience. By offering subscription-based access to specialized training content, you can build a steady revenue stream that supports growth and innovation.

Enhancing Customer Value Perception:

There's a psychological aspect where paid services are often perceived as more valuable. Introducing premium courses or advanced support tiers can elevate the perceived value of your offerings, encouraging deeper engagement.

Fostering Increased Customer Commitment:

A financial investment signifies a higher level of commitment. Encouraging course completion through paid certifications can lead to more engaged and loyal customers.

Differentiating in Competitive Markets:

In a sea of sameness, unique offerings set you apart. Developing exclusive, advanced training modules for paying customers can be a key differentiator.

Cheat Sheet: Tips to Get Started

Assess Current Training Resources:

- Inventory existing materials and identify gaps.
- Set clear monetization goals aligned with organizational objectives.

Understand the Target Audience:

- Conduct market research and create learner personas to guide content development.

Develop a Content Strategy:

- Plan a curriculum focused on high-value topics.
- Determine the mix of content types to cater to diverse learning preferences.

Choose the Right Technology Platform:

- Select an LMS like Skilljar that supports e-commerce integration and provides valuable analytics.

Set Pricing Models:

- Decide on pricing strategies and consider a mix of free and paid content.

Create and Launch Initial Offerings:

- Roll out an initial set of courses and use early adopter feedback for refinement.

Implement Marketing and Sales Strategies:

- Develop campaigns to promote courses and train the sales team to bundle training with product offerings.

Measure and Analyze Performance:

- Track key metrics and regularly survey learners for feedback to continuously improve content.

Iterate and Scale Up:

- Use data and user feedback to expand course offerings and explore additional revenue streams.

For example, a company could start with high-demand VILT courses, leveraging Skilljar for purchase and access. Offering courses at a discounted rate initially can help gauge market response and gather insights for future expansion and pricing adjustments.

Tech Tips: How to Operationalize with Your Tools

Options for Monetizing:

- Implementing Promo Codes:
  - Setup: Create targeted promo codes for specific courses or events.
  - Outcome: Increased sign-ups and engagement.
- Utilizing Training Credits:
  - Setup: Sell training credits in bulk for organizational training.
  - Outcome: Streamlined sales and access.
- Adopting Direct Payments:
  - Setup: Integrate a payment system for individual course purchases.
  - Outcome: Direct revenue from sales

Key Actions:

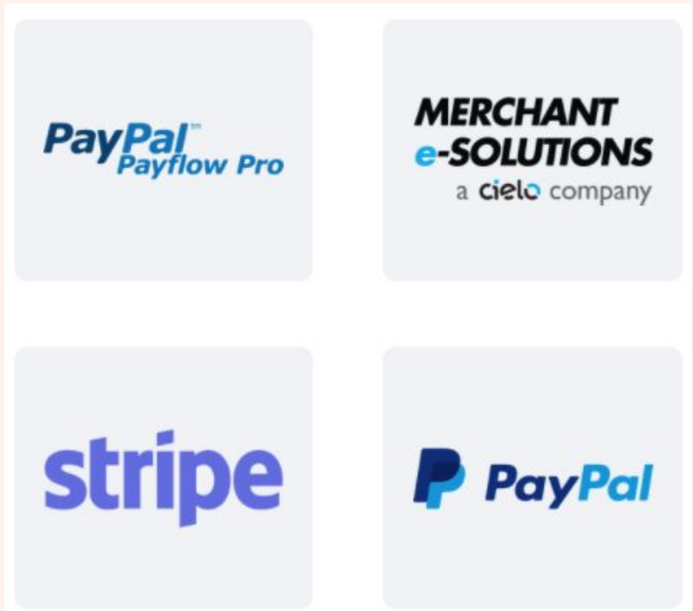
- Payment Integration: Set up the right eCommerce for you
- Corporate Partnerships: Target organizations for bulk sales.
- Customer Support: Ensure a seamless helpdesk for payment and access queries.

Expected Outcomes:

- Increased enrollments and a steady revenue stream.
- Enhanced user experience with flexible payment options.

By meticulously planning and implementing a monetization strategy, you can transform your customer education programs from cost centers into valuable revenue-generating assets. This strategic approach not only supports organizational growth but also enhances the value delivered to customers, fostering a culture of continuous learning and commitment.

Integrations to Make Life Easier



Ready for some inspiration? Here's how MRI made the leap

Who

MRI

Industry: Real Estate Software

Headquarters: Cleveland, OH

Integrations:
Salesforce
Webex
SSO

> **We blew our revenue target for paid eLearning content out of the water, exceeding it by 18% with Skilljar.**
>
> **— Collin Bensinger, Director, Education Services, MRI Software**

Why monetize?

- MRI was expecting significant growth and realized their current 1:1 training model was unsustainable
- Training content from acquired companies was spread among legacy LMS systems

How they did it

- Consolidated LMSs to host 700+ courses in their Training Academy
- Implemented four academy domains localized by region–North America, UK, South Africa, and APAC
- Offer a mix of free and paid trainings, including public ILTs, and learner certifications

38% increase in YoY eLearning revenue

Migrated ~60 courses from other LMSs

Exceeded monetization goal by 18%

skilljar

“Being revenue-generating allows you to fund your own growth.”

–Maria Manning Chapman, Distinguished VP Education Services Research, TSIA

PLAY 7

Scale Efficiency with Automation & AI

skilljar

PLAY 7

Remove friction and manual work

Why automate & use AI?

First, it helps with every other play

There's a reason we saved this for last—automation & AI are key tools in your arsenal to help scale. Creating complex customer education programs is no easy feat, and that's where you can lean on tech to remove the burden on your day-to-day. The win? Frees up your time to focus on more strategic work.

Scale

As your company grows, so do your customers. Whether you're introducing new product lines, new verticals, or new languages — you need tools that help you meet the needs of many without expanding headcount at the same rate.

Speed

With AI, you can simply work faster. That doesn't mean AI is the thought leader in the room—that's you. It means it can take core work you've already done and create short descriptions, or automate quiz questions, or simply help you get more 'life' out of the content you already created.

Synchrony

When you have automation and tech at your fingertips, you're making sure that each customer has a personalized yet consistent journey. Rather than customers having vastly different learning experiences depending on their CSM, automation creates a uniform flow that's seamless.

How to Use Automation In Your Day-to-Day

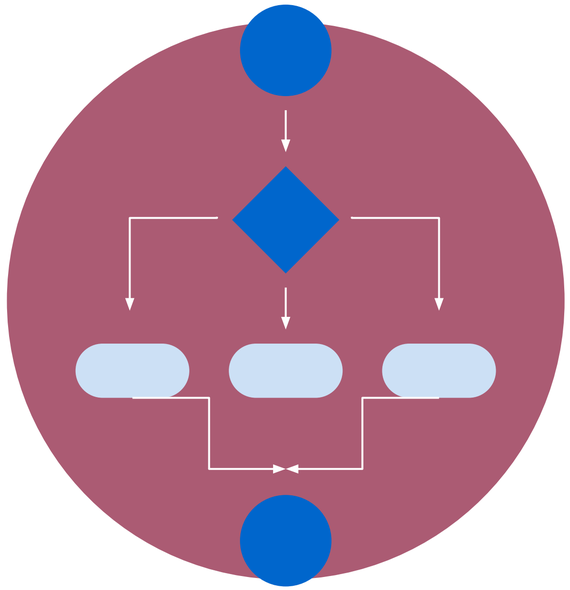
RECERTIFICATION: Pre-schedule enrollment in a recertification exam or course when a learner certification expires

PERSONALIZED ONBOARDING: Unlock advanced courses, a new academy homepage or an exam for learners only after they complete onboarding or preparatory modules

ADAPTIVE ONBOARDING: Place learners in the optimal learning path or course after an initial placement exam or based on course progress

GROUP ANALYTICS: Automatically put learners in a “certified” or “non-certified” group and see how key metrics differs to self-serve, reducing support tickets and increasing satisfaction.

COOL DOWN PERIODS: Temporarily hide an exam retake after an exam failure

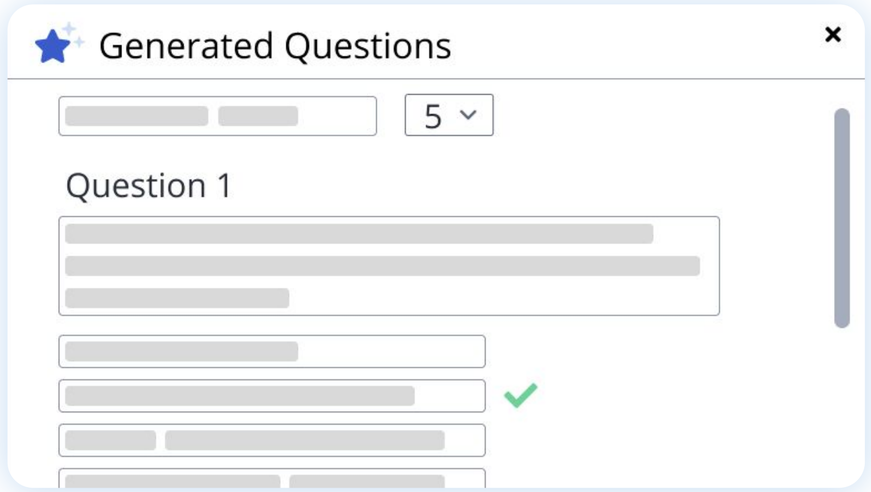


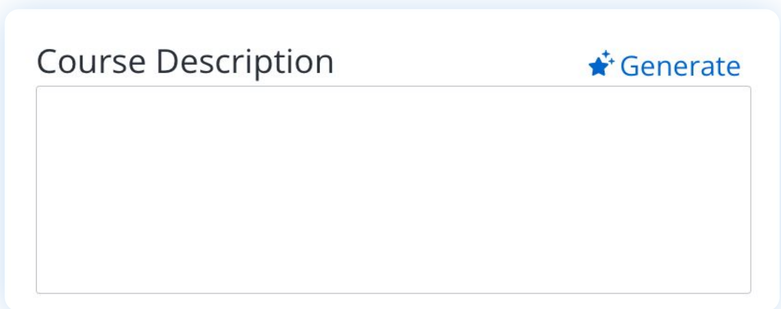
How to Use Automation In Your Day-to-Day

COURSE DESCRIPTIONS: Using the existing content in your course and lessons, we suggest a concise and compelling short description with just a single click.

QUIZZES: With the click of a button,, AI can automatically generate a set of five to ten quiz questions using your course and lesson content. You can review the questions, edit answers, and seamlessly import the questions as a quiz or question bank.

AUTOMATIC LEARNING OBJECTIVES: Create a list of learning objectives to include in your long description, automatically crafted from your course content.

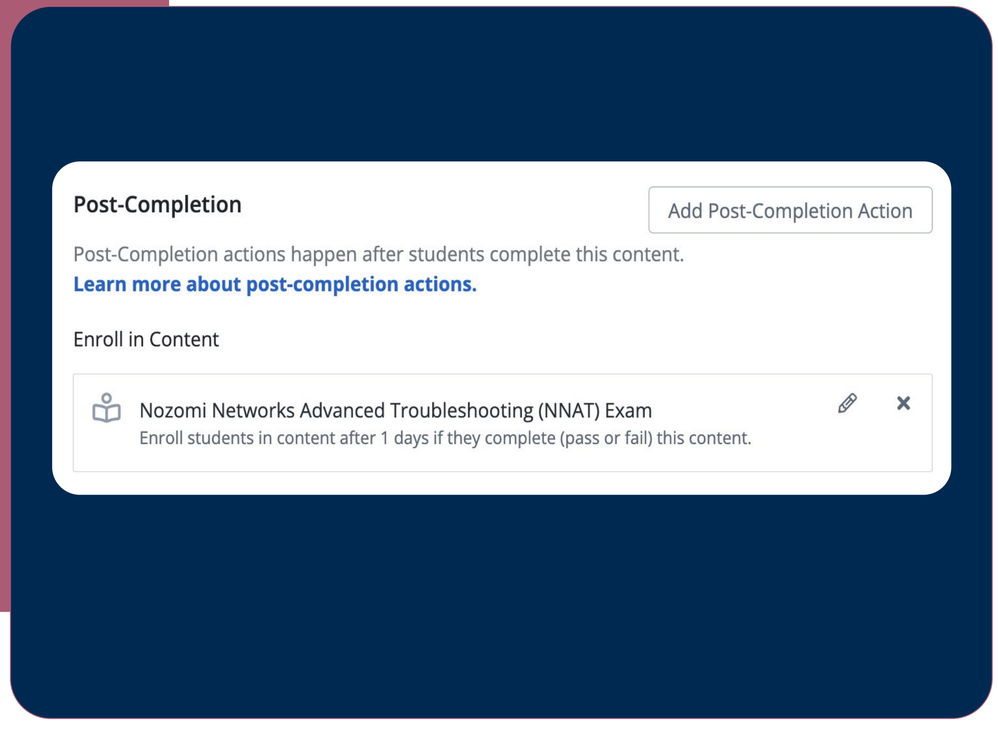




"Skilljar Actions was a huge time savings for us—we now automatically enroll students in an exam if they pass our prep course. Before Actions, it was a headache to manually send out enrollment codes for exams."

Amy Vujanich, Learning Experience Designer





Ready to put your plays into practice?



skilljar

Finally, connect learning to revenue.

Putting plays into practice can seem daunting if you don't have the right foundation to start with. At the end of the day, it's all about delivering personalized learning experiences that help you deliver value and revenue. But, you don't have to do it alone. With the right external LMS, turning customers into experts is just a few clicks away.

Want to learn more? Take a Skilljar product tour to set your CE in motion.

PERSONALIZED

LEARNER EXPERIENCE

- Asset library to categorize and search content types
- Curated learning paths
- Single-Sign-On

BUILT FOR EXTERNAL CUSTOMERS

with monetization and certification

- Integrated billing and payments
- Subscriptions, promo codes, bundled packages and plans
- Salesforce revenue tracking and training credits

IMPACT-FIRST

ADMIN EXPERIENCE

- Native insights and analytics
- Salesforce integration
- Industry and peer benchmarks

> ***"I've never had this kind of love affair with my LMS before. I didn't realize how easy and accessible an LMS could be until I found Skilljar."***
>
> **Carin D'Oliva**
> **Customer Education Program Manager, Asana**

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