



# Peter's Perspective: Imagine the Possibilities of a Well-Educated Customer

A few years ago, I was thirty minutes away from delivering a presentation in front of an internal audience of senior leaders. My boss finally found a moment to review and critique the slide deck I sent to him a week before. His only words?

## **"Don't bury the lede"**

I wanted to bury him because he'd had a ton of time to review the content but hadn't. But, hey, no time for whining... we need to be nimble! So, I reworked it during the countdown to the top of the hour and delivered it on time to what ended up being a very receptive audience. I decided to bury the hatchet with (not in) my boss (apologies for the macabre tone here) and recognize that what he offered as feedback in that moment, while grating, was actually pretty valuable and has stuck with me to this day.

Burying the lede is a journalistic expression meaning you should make sure your main point or argument isn't situated too far into your story (or your PowerPoint deck, in my case). By putting it upfront, you reduce the risk of losing the attention of your audience. Still with me?

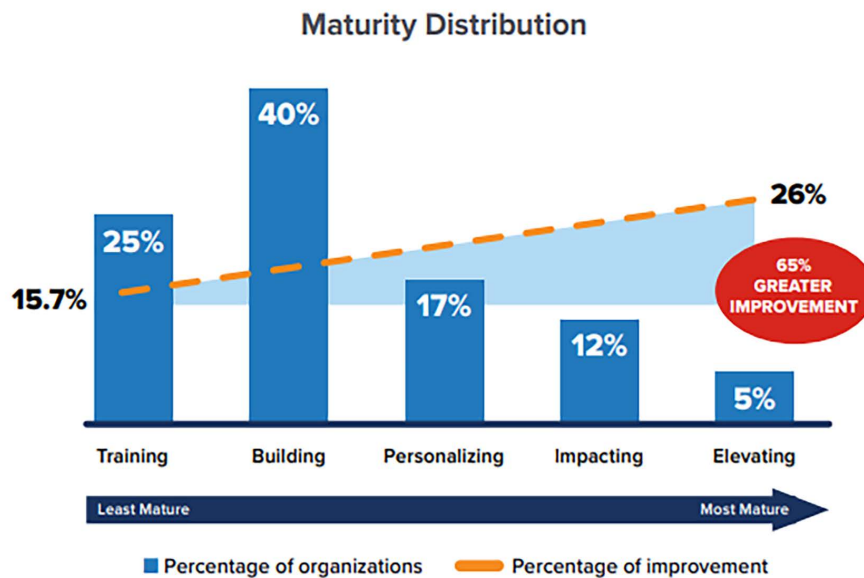
So, I won't bury the lede of this piece. Here it is and it's only halfway down the first page.

***Investment in customer and extended enterprise education is rewarded with accelerated growth in key metrics.***

- ***Companies across industries are realizing 10% to 16% increases in performance on key metrics across every segment of the customer life cycle, from demand generation through sales, onboarding, renewal, and growth.***
- ***Roughly one-quarter of the change in those business measures was attributed to customer and extended enterprise training.***
- ***In the most important measures influenced by customer and extended enterprise education firms saw improvement between 19% to 22%.***

**Impact is felt across industries, including manufacturing, software, technology, and telecommunications. As customer and extended enterprise education programs expand and mature, the benefits compound.**

That's just the opening salvo in Thought Industries' [The 2022 State of Customer Education Report: Investments in Customer Education Lead to Growth Program](#) and the scope of impact that section communicates is startling. It's also head clappingly obvious. Think about it... being trained on how to use complex products should be a given, no? Isn't it a no-brainer that a well-trained individual will have a much better chance to extract value from a product than an ill-trained or untrained individual? Well, apparently, it's not because in the same report, the following graph shows up.



n = 260 Source: Customer Education Survey, IDC, February 2022

65% of organizations are in the lower ranks of maturity around the education that they provide to their clients. So, companies are struggling to educate their clients and have some way to go before they will begin to see the improvement in business KPIs that come from educated clients.

## Who has time for instruction?

I do. I'm a guy who reads the instructions for every product I buy. And before you conclude that I'm a dim bulb, I have accomplished the minor feat of clearing dense woods, and designing and building, to code, my own 800 sq. ft. off-grid cottage. Manuals? Yes, please. Especially when the task involves lethality, like using a chainsaw for the first time, or making gas connections for a water heater.

I'm also a fan of [Marcus Aurelius](#) who once said, *"The art of living is more like wrestling than dancing, because an artful life requires being prepared to meet and withstand sudden and unexpected attacks."*

Deploying and utilizing most software usually doesn't put you into the lion pit at the Colosseum or see you holding a shrieking chainsaw that is designed to inadvertently kick back at your head. But in business, deploying and utilizing software will likely put you somewhere along the path of revenue. And, in some cases, that could be a matter of career life and death. Education helps in all these scenarios.

Recently, I've come back to a decades-old observation about customers and their product knowledge that I acquired during my earlier years in Customer Success, and even earlier when I was a demo-jockey Solutions Engineer in Sales organizations. It was obvious to me that the most successful customers were those that were best educated about the product. And I don't mean self-educated customers. Stumbling one's way to success is really just a testament to dumb luck, not preparation. And as your first cardigan-clad university prof mumbled once, maybe twice, but never again, "Prepare for all the tests and exams because I guarantee you will fail otherwise."

## Who else buries ledes?

Ah, of course, software vendors do all the time. They bury ledes - often intentionally - during the sales process when they de-emphasize the criticality of the educational component. It's as if they want to portray how easy it will be to realize value. Too often though, they obscure the amount of effort that customers will experience when adopting products. Of course, their motivation is fear. Fear that knowledge about training expectations will slow the sales process or scare the prospect off all-together. Ask any Customer Success professional in the world whether that strategy works [over the course of the customer's lifecycle](#).

In the subscription economy, transparency is a key enabler of trust. And one way a vendor can start off on the right foot is by properly positioning customer education upfront. It makes no sense to avoid it because doing so will inevitably come back to bite in the form of customer churn. It should be like basic arithmetic so let's use this equation.

## Success = Product + Will + Knowledge

The math of success fails for any product that requires the uneducated user to perform actions. Which is to say, almost all products. If Sales deliver on the Product variable, and the customer delivers on the Will variable, what entity should be responsible for ensuring the Knowledge variable is delivered? Shouldn't that be Customer Success? Of course, and in many ways that group is already doing that. My concern is that it's generally not following through enough to ensure that sufficient training is consumed. I get it. No one wants to be a nag. But it's not nagging to explain to customers that the fastest way to reach their stated goals through the product is by acquiring knowledge and then putting that knowledge into action.

To help you out, I've come up with what I refer to as a...

## Customer Success Governance Framework for Customer Education

1. CS leaders must work with Sales leadership to ensure that the sales process provides clarity for the prospect before the contract is signed of the educational requirements for the product (an unsurprised customer is the best customer)
2. CS must advise the Sales team about the appropriate amount of education credits that should be included in the contract (for mature companies, this is almost always automatic and part of the product packaging)
3. As part of the kickoff communication, include an education outline (lay it out upfront so that the customer can incorporate it into their planning and scheduling)
4. After sale, Customer Success should monitor the customer's consumption of education and make a point of regularly reporting on it to the customer leadership (the critical point here is to make the connection for the customer between education and pace of adoption)
5. As the renewal date approaches, CS should ensure that education is positioned as one of the reasons for success or, in the case of low education credit consumption, as a reason why the customer might not be enjoying the success they expected (clarity of communication throughout the customer lifecycle is a hallmark of great CS teams and is a foundational element of customer advocacy)
6. If the customer is realizing great success with the product, CS should start planning for expansion and – again – ensure that steps 1 – 3 are developed (long-term customer relationships are essentially a series of concentric loops made possible only through trust, credibility, and reliability)

One of my favorite high school teachers taught biology and was a former pitcher for the Chicago Cubs. He was also the assistant coach of the varsity basketball team I captained in my senior year. So, I saw a lot of him. He liked to say to the class, "High school is like baseball. There are all kinds of ways to strike out and drop the ball. But there's only way to hit and catch. Practice. Don't come crying to me if you fail the exam. I've given you everything you need to succeed. You've got the easy job. You just have to listen and study what you just heard and read, and maybe ask a few questions along the way as they occur to you."

Engage your customers with education. Encourage their curiosity. Fire their imagination.