Brandon Hall Group

HOW TO BUILD

Your Customer Training Technology Stack From the Ground Up
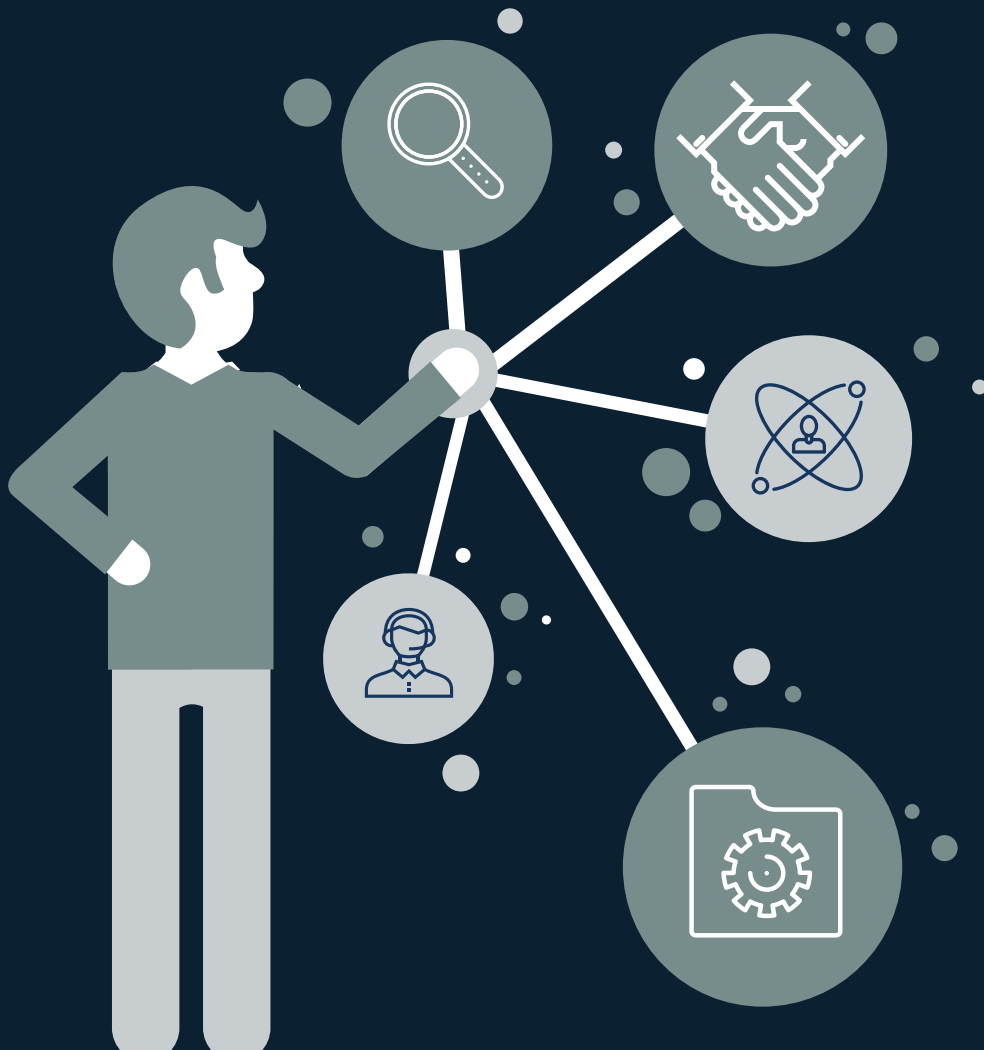
2018

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The Rise of Customer Training and its Impact on Business Performance

Companies in every industry are in a state of disruption. This is especially true for software, technology and subscription-based businesses who must now deliver value at every stage of the customer lifecycle to fend off competition and ensure sustainable recurring revenue.

To remain competitive, companies are turning to education to differentiate themselves and add value to the customer experience. As a result, they are making a substantial investment in customer training.

The importance of training in the customer lifecycle cannot be understated. But how do companies go about the process of building a customer training program? What resources do you need, and what is the role of technology? In this guide, you will find the tools necessary to train your customers and drive measurable business outcomes.

Top Business Priorities for Organizations

1	2	3	4	5
Improving customer experience	Gaining market share	Developing new products/ services	Driving innovation	Improving sales effectiveness

Source: 2019 HCM Outlook Study

Five years ago, customer experience did not make the Top 5 business priorities in Brandon Hall Group's annual HCM Outlook Study. Now it ranks first. Organizations have a better understanding of the impact and importance of a great customer experience and are responding accordingly.

How Training Impacts the Customer Experience

Stronger relationship after the sale

Staying ahead of the informed consumer

Less reliance on customer support

"Customer experience" is expressed as a single thing, but it is really a collection of factors, including:

- A strong post-sale relationship with the customer.
- Access to information that builds on the customer's product knowledge derived from the Internet and social media.
- Meeting customers' needs and expectations to decrease or eliminate reliance on customer support.

Delivering compelling learning to customers can have a big impact on the overall customer experience. Customers must know how best to use your product and have success doing so. Customer training helps them do just that and builds value along the way.

Contextual learning teaches customers how to use or apply the product to solve problems, and is especially effective. Your customer-learning program also can include certifications, providing recognition and rewards for levels of product expertise. This can drive customer engagement further and can also provide ancillary revenue if you charge for the certifications.

What Drives Customer Experience?

Customer expectations are changing

Training is becoming a strategic weapon

Product life cycles are much shorter
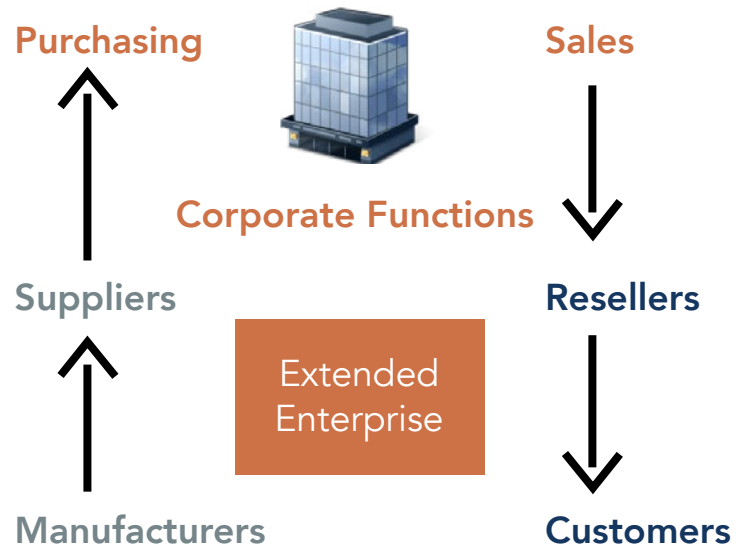
Customer training is a critical step in CX

Distributed and augmented workforces

Increasing pressure of corporate compliance and security

Where Customer Training Fits in the Learning Ecosystem

Customer training is part of Extended Enterprise Learning, as illustrated on the right. People on both sides of the supply chain benefit from the training you deliver. This can include your suppliers, external sales partners and most importantly, the customers who use your products. Brandon Hall Group research shows that 54% of organizations now extend learning beyond employees, and of those organizations, about 70% deliver training on new or existing products and services, or deliver product or service information.

Purchasing

Corporate Functions

Sales

Suppliers

Resellers

Extended Enterprise

Manufacturers

Customers

THE LEARNING ECOSYSTEM
Larger than you think

Public Citizens

Brand Followers

Clients/Customers

Sales Channels
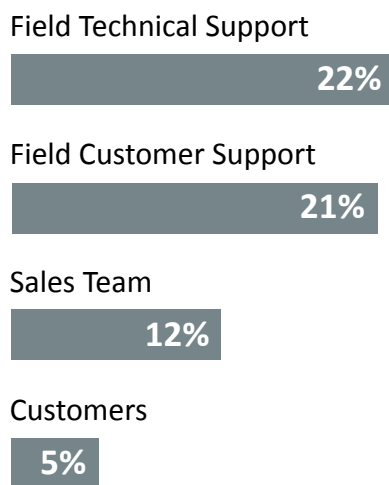
Partners

Contractors

Employees

Taking a closer look at the Learning Ecosystem, you can see that it starts with employees and extends to sales partners, customers and clients, and even "fans" who follow the brand and seek product knowledge. Extended learning can be a good revenue generator, but providing free product training to the general public can also create interest and demand among brand followers and others. The extended-learning ecosystem is tremendously important to retain customers by providing a great experience, attract new ones and give sales partners the information they need to maximize sales opportunities.
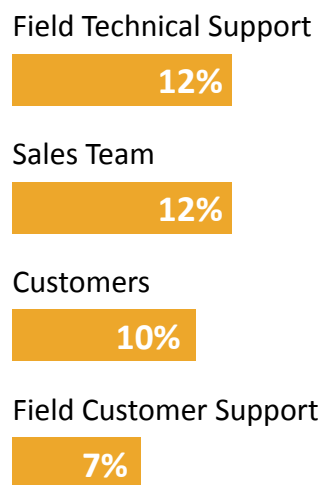
The Role of Frequency in Customer Training

The extended-learning audience is diverse, and there are also significant differences in the frequency of training, depending on who consumes it. As these graphics show, organizations believe that customers should be able to access training on a daily basis, much more often than other groups. Surprisingly, 80% of organizations still provide a lot of in-person instructor-led training, but that is not sustainable when customers demand any-time access to learning. Organizations seeking to optimize the impact of customer training must fulfill that demand through digital technology. But customer training is not the same as training employees. It's important to have systems that also track customer demand, deliver meaningful metrics and measure ROI.

Target Training **Monthly**

Field Technical Support
22%

Field Customer Support
21%

Sales Team
12%

Customers
5%

Target Training **Weekly**

Field Technical Support
12%

Sales Team
12%

Customers
10%

Field Customer Support
7%

Target Training **Daily**

Customer
32%

Field Customer Support
25%

Sales Team
21%

Field Technical Support
19%
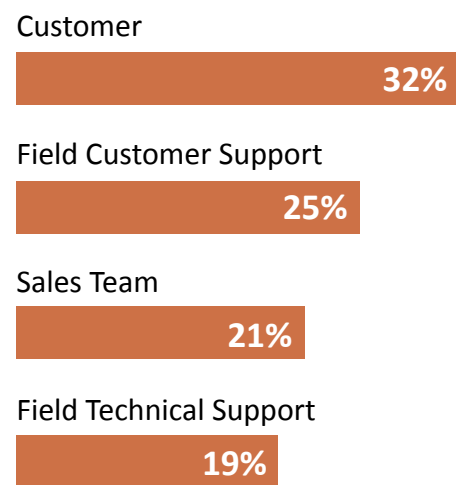
The Anatomy of a Customer Training Technology Stack

The key to maximizing customer-training ROI of is having the right types of software to:

> Oversee the customer lifecycle

> Manage the learning processes

> Facilitate and manage communication between you and your customers.

The LMS lies at the heart of digital customer training. It serves as the gateway for learners—where they head to get their assignments, view alerts, receive notifications, take assessments, receive evidence of learning, and communicate with subject matter experts.

There are several core features that can:

1. Meet learners where they are to create an engaging learning experience.

2. Allow you to turn your customer learning, including certification, into a profit center.

3. Create different types of learning for a wide variety of use cases.

4. Enable subject-matter experts unfamiliar with web-based authoring tools to easily create content.

5. Brand your learning effectively.

6. Capture data and report it in compelling ways to understand whether your learning is delivering desired outcomes and creating the customer experience — and revenue streams — you intend.

The different types of software for customer success and training can be divided into a few broad usage categories:

Customer Lifecycle and Success Management

Training Delivery and Behavior Change

Customer Communication

CORE FEATURES
of a customer-learning technology stack

Native Authoring & Interoperability
Web-based tool to create a highly engaging learning experience

Powerful Commerce Capabilities
Transaction management, optimized conversion, upsell and discount

Customer Segmentation
Manage large volumes of concurrent learning partners

Cloud Hosted & Secure
Scalable platform, no maintenance or development

Brandable and Responsive
White-label experiences across all devices anywhere

Integrated, SSO & APIs
Open and connected to interact seamlessly with your tech stack

Data and Reporting
Deep data, learner engagement and revenue analytics

Engagement Tools

In addition to core features, there are other programs that make a business difference for your customer-learning program. They include:

Meeting Software

This is also known as virtual classroom, videoconferencing or webinar software, or virtual instructor-led training (VILT). Some programs are better suited for pulling people together with video, audio and whiteboards for a virtual meetings, while others are intended for slideshow presentations with audio. Some companies offer both.

Chat

Chat windows, otherwise known as messaging or instant messaging, are common on software home pages, asking if you need help before the purchase. Chat is also a useful mechanism for ongoing customer support. It is essential to the stack because some people would rather "chat" by text on a web page than pick up the phone and speak to a human.

Community Engagement Software

These products serve as targeted forms of social media. They give people a place to ask and answer questions and help each other. Though answers may come from customers, the company should monitor responses to ensure they're correct, or add additional insights and delete spam or other inappropriate content. As the information aggregates, the forum becomes a valuable resource, allowing people to search for information without posing a question at all.

Blog software

Most every company has a blog these days, as a forum for sharing news directly with customers, promoting events, publicizing new case studies, and sharing advice and other information. Blog software has become content-management software, serving as a tool for creating full websites. Often, the functionality of typical blog software is included in marketing automation programs.

You also may want to include additional programs to complete your customer-training stack. Sometimes, the features of these "one-offs" are also included in one of the platforms we've already covered, but that varies by vendor. They include:

Customer Engagement Tools

Survey Software

The ability to run customer-satisfaction surveys is important. You can you quickly set up surveys to learn if people are satisfied with your customer-support. You can also query new customers about why they haven't used their trial product or what it would take to get them to try the latest features you've developed.

Email Marketing

Until you have full-fledged marketing-automation software in place, you may rely on a dedicated email-marketing service. These programs help you stay in touch with training prospects and customers.

Best Practices for Choosing Customer Training Technology

Now that you understand the technology that makes up a winning customer-success and training operation, it's time to start building. But first, here are three stacking tips from the pros that will save you time, money and frustration.

1
Interoperability is Important

All of the programs we've listed here generate their own data, but it's just data in a silo unless you integrate it and learn from it. An advantage of working with the big names in each category is that they follow industry standards to enable you to connect diverse systems. That can be done by a connector, application programming interface (API) or a dedicated third-party tool.

2
Choose Best-of-breed

While some of the companies referenced here may covet your customer-success and training business, they're not all best at what they do. Map your technology needs to cover the big areas of your operation, sort out what your existing software already addresses, identify the gaps and run trial versions of applications that could help close them. Where you see overlap, go with services that appear to have staying power, have clear data-privacy options and play well with the other tools in your stack.

3
Remember: You're a Customer Too

Your customers expect certain things in the training they buy from you: service that's mobile and works on any device; browser-based so it's always available; and modular and video-based so they can quickly learn just what they need. Make sure any service you subscribe to as part of your tech stack provides the same feature set: mobility, browser-based and outfitted with video training.

8 Steps to Building Your Technology Stack

Now you understand the technology needed for successful customer training. But how do you select the right technology to meet your unique needs? Brandon Hall Group has a customized selection process to help you identify the best customer training technology for your organization.

Build the Business Case

Start by identifying your needs. Make a blue-sky wish-list to address the types and frequency of learning you must deliver. Identify — as specifically as possible — business benefits. Conversely, you need to determine the impact if you do not conduct customer training or continue to use technology not designed for optimum customer learning.

Define Your Stakeholders

Will L&D own customer training? Or your sales training organization? Beyond ownership, who else has a stake in educating customers? Marketers? Your retail division (if you have one)? Technology must meet the needs of business stakeholders as well as learners. Make sure you have a firm understanding of who must benefit internally and involve them every step in making the technology business case. They can be your biggest allies — or impediments.

Identify Requirements

Based on the level of learning you intend to provide, what functionalities are required? You may be at one level of customer training now (or in the near future), but you must also look to the future. What will you need in three to five years? Understand where you are headed and ensure your vision is aligned with business stakeholders and business goals.

Create Use Cases

We've covered customer training in a general sense, but to ensure you have the right technology, you must create specific use cases. How will customers interact with the training? What are the goals for the training? How will you measure success? All of these things must be thought through and modeled in use cases.

Scripted Demos

Once you build use cases, leverage them to create scripts for vendor demonstrations. Don't ask a sales rep for a generic demo of functionalities and features. Request demos that address your use cases. You must know how the system accommodates the specific learning needs of your company and its customers.

Use References

Once your vendor choices are down to a couple of top contenders, contact their current clients. Ask questions based on your use cases. Some buyers avoid references because they think vendors would not provide them unless they were going to praise their products. But if you ask specific questions, references will provide you with insights you might not expect. Even the best user experience includes some hiccups and references will tell you about them — if you ask the right questions.

Identify Support Levels

Since no system is perfect, you must know how the technology provider supports their product. Ensure you identify who is responsible for support during and after deployment, and the type and level of training you require to run the system. How much of the training is included at no extra cost? What do you need to pay for? Support can have a big impact on the total cost of technology ownership, so it's wise to ask these questions before making a decision.

Integration

Focus on integration with other customer-facing systems. How will your customer-training technology match up with the company's learning ecosystem? If you are going to sell training, ecommerce functionality is required, as well. You must really understand how the new system will work with all other technology your organization relies on.

Key Takeaways

> Customer training shares some of the same goals and modalities with internal training but has unique elements that require a separate strategy, with technology designed specifically for customer training.

> Ensure you understand how customer training fits into the customer lifecycle, and the types and frequency of training that are best for your organization.

> Focus on finding the right technology fit for your organization. Done correctly, customer training not only engages customers and prospective customers, but creates a revenue stream and delivers great ROI that includes reducing customer churn.

> It's critical to ensure your technology stack includes core features you need to make customer training successful, but pay attention to other critical options, such as chat, community software, surveys and email marketing to optimize your outcomes.

> When it's time to select technology, don't take shortcuts. Ensure you approach selection strategically and make the business case, leverage internal stakeholders and create specific use cases that the technology must address.

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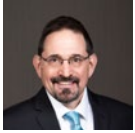
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About Brandon Hall Group

With more than 10,000 clients globally and 28 years of delivering world-class research and advisory services, Brandon Hall Group is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

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Membership
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