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Well CEd! II

INSIGHTS FROM TODAY'S CUSTOMER EDUCATION EXPERTS

Meet our panel of **experts**

Roberto Aiello
Senior learning experience designer, Personio

Ran Barzilai
Director of technical support and training, Thales

Dan Braithwaite
Senior director of product training, Mediaocean

Josh Cavalier
Founder, JoshCavalier.ai

Dave Derington
Senior manager, learning solutions and programs, Atlassian CELab podcast

Shannon Howard
Director of customer and content marketing, Intellum

Vicky Kennedy
CEO, Echtus

Kristine Kukich
Owner, The Training Sherpa

Samantha Murray
Founder, AlignedCX

Shai Raz
Global technical training director, Algosec

Gaurav Shah
Senior software specialist, Trimble

Julio Granda
Training program manager, Trimble

Debbie Smith
Senior director, Visier University; President, Customer Education Management Association

Heather Wendt
Senior community strategist, Higher Logic

Dirk Braune
Director, Kardex Academy

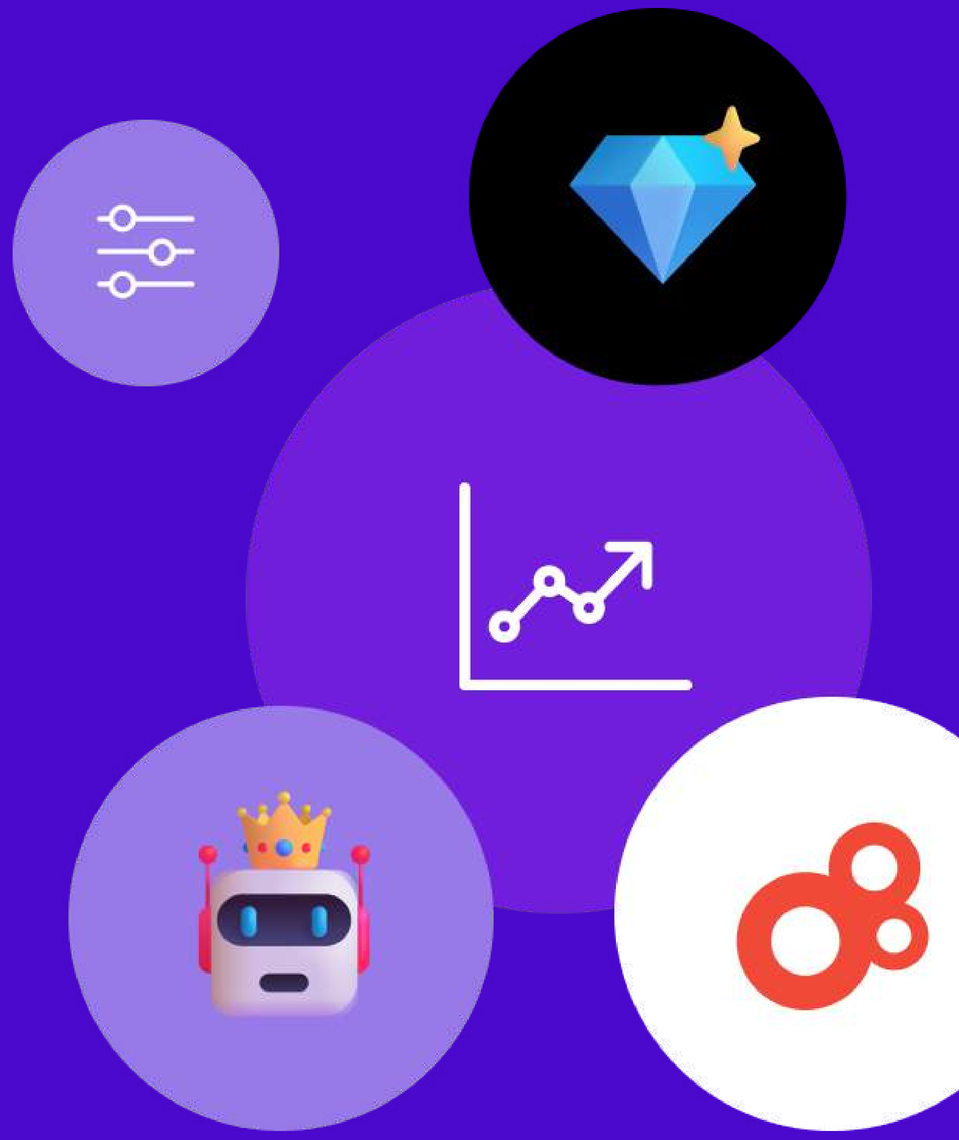
Well CEd, again.

A year ago, we interviewed thought leaders and customer education practitioners to collect their opinions on the state of our industry, publishing them in an informative and widely read eBook titled “Well CEd.”

We got such great feedback on the title that we’ve done it again and proudly present **Well CEd II**, a no-hold-barred assessment of the ever-changing state of customer education in enterprise software. In the pages that follow, a panel of 15 industry professionals examines where we are, where we’re going, and how customer education now fits into the growth plans of the most forward-looking software providers.

I’m happy you’ve decided to take a few minutes to check out what your peers in software training have to say about the continued ascent of customer education and its perpetual evolution. Enjoy.

Annie Reiss
Chief marketing officer, CloudShare



CEd is shining brighter in the boardroom.

“Over the past year, there’s been a growing recognition that customer education isn’t just about delivering content—it’s about driving tangible business outcomes.”

Roberto Aiello

Senior learning experience designer, Personio

A big story has emerged for educators in the software space. What we do is vital. Call it what you will—a practice, function, or department—in any case, customer education has proven how valuable it can be and now shines brighter than ever.

We asked our experts:

Do tech companies now value customer education more than in the past?

Survey says… Yes.

Allow me to share what some of our industry experts think.

Dave

Yes, customer education drives customer outcomes. Connections are now made to important metrics including adoption, retention, revenue, onboarding time (or time-to-value), support tickets, and more.

Dirk

Value comes more from the ROI and impact of education. And I think that visibility is better today than it was a couple of years ago. What's the impact on customer satisfaction? What's the impact on renewal rates? What's the impact on the net revenue return?

Heather

It is becoming more recognized as a foundation of customer success. Without effective customer education, you must rely on increasingly strapped teams to help customers overcome product roadblocks, identify areas for growth, gain more confidence, and ultimately, increase adoption.

Debbie

The reality is the customer experience and customer success teams are understanding it more, but we still have a way to go with the C-suite. I think partner education is really where there's going to be more focus. It's easier to show how it is affecting the company's bottom line.

Vicky

The industry is hungry for a greater understanding of customer education and how to invest in it. I'm pushing to get to the next stage where we're not just showing loose correlations but connections between engagement metrics and efficacy metrics and how that actually impacts business.

Roberto

Yes, and I’ve noticed technology providers increasingly recognizing the unique needs of customer education. I see more providers acknowledging that customer education teams require different solutions than the tools used for internal L&D to deliver value: solutions tailored for onboarding, driving adoption, and supporting long-term engagement with external audiences.

Shannon

I think more companies are thinking about customer education as a form of scaled customer success, digital customer engagement—whatever you want to call that—customer success or customer experience.

Ran

For us, customer education is now an acknowledged profit center. The currency of customer education is rising.

Kristine

We're seeing a lot of conversations around how customer education is impacting retention in the post-sales customer journey.

We must move the needle.

“If you don’t align everything you do with business objectives, you have no reason to exist in the business.”

Debbie Smith

Senior director, Visier University
President, Customer Education Management Association

Customer education professionals may do things differently, but they share a common goal: to make a positive impact on the bottom line.

The essential question we asked here was:

Are we making strides in aligning customer education objectives with business objectives?

As you'll read, everyone said some form of "yes," but connecting overarching company KPIs with customer education objectives isn't always smooth sailing.

Dan

A lot more people were talking about tying the team's objectives to the overall business ones and company metrics. We've been able to show support ticket deflection for trained customers. However, disconnected systems make this process very manual and time-consuming.

Shannon

I don't know a single person who isn't familiar with this concept. But execution-wise, it's very difficult, even for some of the world's largest companies and learning organizations. Over the past year, I've become more aware of how many organizations don't communicate their business objectives, so nobody knows how their work ties to company goals.

Ran

Call deflection is now a key business objective. Effective customer education means less resources have to be invested in technical support. If a support engineer identifies a customer's knowledge gap, they can help them and then direct them to a learning portal.

Shai

I came up with a slogan: business-driven training. When we talk about business-driven training we're looking at the full lifecycle of the customer and identifying the learning needs throughout that journey.

Julio

We want to evaluate how our training supports the customer journey, such as whether it drives faster and better product adoption, improves renewals, or enhances overall customer success. This requires connecting training outcomes with key unified customer metrics to demonstrate its real impact. It's easier said than done, as some of the impacts are also long-term.

Samantha

Aligning customer education objectives with business objectives is critical for CE leaders to get a seat at the table. But more often than not, CE leaders don't have enough context on business priorities. CE leaders should get a handle on the business's top challenges and goals by building relationships with cross-functional leaders and stakeholders. This is where you learn how to maximize your impact.

Heather

This is something that I have focused on for years now due to the importance of tying back to organizational goals. Looking at retention, expansion, and usage for customers who are engaged in the educational offerings versus those who aren't, has been a valuable method of showing the impact of customer education on CSAT and the overall customer experience.

Debbie

Some of the objectives are shifting. We're seeing more objectives around efficiency. How does customer education affect efficiency? We can use AI to streamline our processes, but we can also help other teams increase efficiency. We should be looking for efficiency measures such as decreasing support tickets, decreasing time to resolution, and decreasing the amount of time the CS team spends training.

Roberto

At Personio, we are making a concerted effort to align our customer education KPIs with key company goals like product activation and adoption. As customer education becomes more integrated into the customer experience, it's clear that aligning with company objectives isn't just a best practice but a necessity for driving long-term value.

What flipped our switches?

“The biggest idea that guided our education efforts this year was the knowledge that the customer learning journey is not the same for everyone.”

Heather Wendt

Senior community strategist,
Higher Logic

We strove to have our experts explain any big ideas with this open-ended question:

Can you describe any new thinking, techniques, or strategies that impacted how you approached customer education in 2024?

Unsurprisingly, many of the answers included insights about how AI was being applied, but a handful of other interesting ideas also came to light.

Kristine

2024 was the year of AI. I spent much of the year focused on the five key parts that impact customer education: personalization, gamification, assessments, content development, and data analytics.

Dirk

Two areas stand out for me: customer training and customer education are becoming more and more integral to an overall customer success approach, and there's a clear long-term trend toward education services as subscriptions: what some call learning-as-a-service.

Dave

AI, AI, and AI! It's starting to affect every aspect. So, be cognizant of the capabilities of AI beyond just a chat agent, or chatbot. Now it's agentic AI and different tools with AI embedded.

Josh

With the backdrop of generative AI, there were opportunities to create new experiences for customers, specifically around personalization or chatbot-based activity.

Heather

The biggest idea that guided our education efforts this year was the knowledge that the customer learning journey is not the same for everyone. This meant looking at the information the customer needs to know to progress in product adoption and usage. We aimed to create resources in a variety of formats and then present them in a less guided manner so customers could choose where to focus based on their needs.

Julio

To deliver impactful training, it's essential to measure its effectiveness at multiple levels. This includes assessing learner satisfaction, relevance of the training, knowledge acquisition, practical application of skills, and alignment with our objectives. Achieving this requires strong internal alignment and robust technology implementation to track these metrics effectively at scale. This year, we introduced this model and will continue to enhance and expand it in the coming year.

Roberto

One of the biggest ideas that shaped my approach to customer education in 2024 was using AI tools to make collaboration with subject matter experts more efficient. For example, when creating our compensation training course, I used AI to draft the initial structure. This allowed our expert to focus on adding their expertise without spending extra time on drafting or formatting, making the process much smoother and less time-consuming.

Vicky

I started my business at the end of 2023. So, moving to 2024, it was heavily around showing the impactful ROI of education programs. One of the things that I look at is the holistic use of strategic education, not just specifically like a granular customer education initiative, but how education fits in across a lot of initiatives strategically at an organization.

AI is fast-tracking educational content.

“Now we can actually base training on the individual and not just the individual’s persona.”

Kristine Kukich

Owner, The Training Sherpa

When we got to the topic of AI, we wanted to get some insights regarding how it's been applied to date—and where it's headed. The first question:

AI caused a big buzz in 2024. How has it impacted customer education so far?

The answers we got from our experts make it clear that AI has helped content creators save tons of time and has an amazing ability to generate useful audio and video—with immensely smaller spending.

Josh

Velocity—AI gives us the ability to get updated information out to the customer base faster and in more formats. When you have software updates, you need to communicate them and then get the appropriate support out there. AI became a huge part of increasing the velocity of all that.

Julio

We have started leveraging AI to assist in content and assessment creation. This includes using AI for voiceovers, adjusting text tone, and generating test questions. We are still testing it and have not yet implemented specific metrics to measure the impact of AI on customer education.

Shai

Mainly content generation. I heard a radio show, and they were talking about a new Google AI tool that takes a web page or document, it could be anything, and translates the content into a seven-minute podcast of two people discussing it. So, I took our technical documentation about what's new in our new release. Within minutes, it generated a podcast of two people speaking to each other about how cool the latest version of Algosec is.

Dave

Customer education practitioners and leaders are actively learning how to use new tools based on ChatGPT-like technology. For instance, tools like Google NotebookLM can rapidly allow us to collect, organize, and ask questions of a small language model that anybody can create with ease. This accelerates the velocity at which instructional designers can subsume, validate, and rationalize information and structure coursework.

Kristine

We branched out a bit this year into more personalization options and some analytics. We've been creating personas forever, but now we can actually base training on the individual and not just the individual's persona.

Vicky

We're seeing it with video. That's a big one, and kind of an interesting one because I always thought that those were kind of cheesy, but I'm seeing a lot more AI videos that are believable and useful in self-paced courses.

Dirk

It's having a major impact on end-to-end processes. We're creating a massive amount of content and there are tools which help us to create and localize content in various languages.

Samantha

So far, we're seeing a big impact on content ideation and creation, and what I would consider entry-level personalization (recommended content, tailored search results, etc.).

Ran

AI is excellent at spinning up presentations, but the content still has to be closely monitored for accuracy. It will take time before it's fully trusted. Another use case that's a no-brainer is voiceovers for courses. We pay 100 times less than we used to for a professional voiceover service.

AI promises next-level personalization.

“We are talking about a future where content is automatically generated and served in context to meet the customer exactly where they’re at.”

Samantha Murray

Founder, AlignedCX

Next question:

How will AI affect customer education going forward?

The plot thickens. CEd professionals agree the ability to deliver contextual, right-time/right-place product support will be a game changer. Personalization too, is well on its way to changing learning experiences.

With AI being embraced far and wide, it appears the “answers-on-demand” generation is arriving. Say hello to adaptive learning, a new reality for 2025.

Dirk

The ideal use case for AI is to recognize how fast a learner is progressing through a certain module, whether they have questions, and if they need to repeat something, or skip a section entirely. By adapting the content to the person, we’ll be able to shorten training duration.

Heather

AI will help to increase personalization, surfacing the right information for the right customer at the right time. This increased relevance will help make the customer ed process more valuable to customers, which should result in stronger participation.

Josh

Look at automation in modalities that were either time- or cost-intensive. That would be voice, video, potentially avatars. I think you're going to see the next level of support based upon these new models that are coming out. Information will show up in a more consumable fashion, depending on the audience and how they like to consume content.

Debbie

We're going to start thinking about AI differently. The advent of AI agents is going to change us in ways that we can't even understand at this point. The agent piece is going to help us serve customers faster because it is going to pull things from our learning management systems to give instantaneous answers.

Julio

AI will continue to mature, and as it learns from individual users, it will be able to deliver the most relevant and useful content precisely when it's needed. This will make training more targeted, efficient, and impactful by eliminating unnecessary information and streamlining content delivery for a better learning experience.

Vicky

Adaptive learning. The idea is to get any learner from A to Z and some learners may be starting at Q and some learners may be starting at A. It's just about getting them to Z in the most efficient way. Making more interactive personal experiences for our learners at scale is something I can see AI being used for.

Roberto

In analytics and assessment, AI will offer deeper insights into learner behavior, helping to identify gaps and measure outcomes more effectively. AI-driven coaching tools will also evolve, offering more engaging and efficient alternatives to traditional knowledge checks.

Dan

Reporting and analytics tools are desperately needed. Hopefully, new tools will help teams analyze their efforts across various systems.

Samantha

I believe the biggest opportunity with AI lies in its ability to synthesize massive amounts of data to personalize an experience for the customer. Think about all of the touchpoints and interactions a customer has with a brand. If you can then use this data to create experiences on the fly—think customized landing pages and just-in-time in-app guidance—then you start to get into real personalization at scale. We are talking about a future where content is automatically generated and served in-context to meet the customer exactly where they're at.

Small is beautiful.

"We need more just-in-time content surfaced to people where and when they need it."

Shannon Howard

Director of customer and content marketing, Intellum

We continued looking forward with the following question:

What technology trends or educational approaches will set the tone for the training industry in 2025?

While each of our experts offered a unique point of view, a theme clearly emerged. The big idea: think small. That is, software education professionals will better serve the needs of their customers by delivering “microlearning” to resolve issues on the spot.

Kristine

Microlearning and AI will stand out as tools and techniques for 2025. Everybody is now working toward micro-learning in the process of creating content, regardless of who owns that content—marketing, success, support, education or community. The challenge is building it in small enough chunks so it can be leveraged in multiple ways to make sense for whichever audience we're trying to design for at that moment in time.

Dave

I hope to see more microlearning, particularly smaller social media content, which will help bring a bigger funnel to our learning fabric. It's not just your academy, right? As we go further out from the core of something big like that, what are the little pieces that I could seed out in social media that are “marketing/education material? That's going to help generate more EQLs - education qualified leads.

Gaurav

Bite-sized microlearning modules will become more popular which will cater to the exact need of the user. More interactive learning will be preferred by learners which might make use of Virtual Reality (VR) and Augmented Reality (AR) technologies providing immersive learning experiences.

Samantha

In-app chatbots will continue to rise, and I anticipate many more content creation tools. New-style LMSs built on fresh architecture will shake up the market. In some cases, education teams will move away from LMSs entirely to try to deliver content as quickly as possible to a user in the moment of need.

Roberto

Three key trends will shape the training industry in 2025: (1) seamless integration of learning within products, (2) advanced personalization, and (3) AI-driven content creation and assessment. Personalization will take center stage as learners now expect training that adapts to their specific roles, needs, and skill levels.

Vicky

I want to see an increasing focus on building competency that drives measurable results—more focus on using education for long-term change. But as for tech trends, AI is obviously continuing to move forward. It'll be interesting to see how it drives real change and how customer education can get real business results.

Shannon

We need more just-in-time content surfaced to people where and when they need it. And I think we'll see a return to social learning. I mean, that's literally what school is. But I don't think we've thought about the role social learning plays in adult learning and especially workplace learning. How are we getting customers to share what they're doing and answer each other's questions? We have to find a way to open the door for them to share those answers.

Josh

AI-generated audio. I think it's the low-hanging fruit because of the natural sound to it and because of the live bidirectional capabilities that are now out there. I believe that we're going to see acceleration with audio-based solutions.

Ran

Self-paced will set the tone this year. On-demand, subscription-based modular learning for specific topics and issues is what customers want. Moving to self-paced learning will enable organizations to automate huge amounts of manual work and dramatically reduce support costs.

Shai

Tailoring the right solution to the specific status of your learner. That is challenging, and I must say I still don't see how we actually do it to that level, but with AI and additional technical tools, we are getting there.

When all's CEd and done, it's time for educators to **take a stand.**

Putting this eBook together hasn't only been illuminating - it's also been inspiring. It's crystal-clear that CEd is at an inflection point. AI is enabling an evolutionary explosion in how we create content. The demand for on-demand is radically reshaping how we deliver it. And Education teams are now recognized as both key revenue generators and strategic value drivers.

My biggest takeaway from this eBook is that there's a growing awareness of learners' unique wants and needs. We must continuously embrace the technologies and techniques that help us to help them.

We've come to realize our mission has become increasingly essential to the mission of the enterprise software company at large. And a final piece of good news is we've validated the mark we make on customer success.

Annie Reiss
Chief marketing officer, CloudShare

About CloudShare

CloudShare is a leading software experience platform that helps software companies increase customer acquisition and retention by creating highly engaging hands-on virtual training, POCs, demos, and testing environments in minutes.

Our virtual environments are easily replicated in the cloud and purpose-built to generate user engagement that ultimately impacts key business metrics such as customer retention, repeat purchase rates, lower support costs, higher win rates, faster sales cycles, and more.

To learn more about how we can help you improve customer acquisition and retention in your organization, contact us here.