

Well **CEd!**

Customer Education Experts' Insights For 2026



Meet our panel of experts



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Senior Learning Experience Designer, Personio



Steven Carr

Director, Education Development, Delivery and Operations, Infoblox Inc.



Lynn Marie Viduya

Vice President, Global Education Services, OneStream Software



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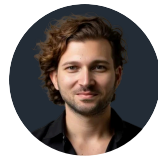
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Dan Braithwaite

Senior Director of Product Training, Mediaocean

Good things come in threes.

Welcome to the third edition of “Well CEd,” CloudShare’s annual collection of fresh perspectives from Customer Education thought leaders and practitioners. The goal of this publication is simple: to provide practical insights to inform your Customer Education strategy. **Training providers, cybersecurity professionals, sales teams, and beyond will benefit from the wisdom shared in the following pages.**

While this year’s contributors, both returning and new voices, share a broad range of observations, several common themes have emerged. Customer Education continues to evolve to meet shifting customer expectations, tighter business goals, and emerging technologies while maintaining training quality, accessibility, and speed.

One thing our experts agree on: the teams that succeed are those who stay focused on outcomes. When your business aligns on the ‘who’, ‘what’, and ‘why’ of customer training, your programs can deliver a better customer experience directly impacts business outcomes.

Inside, you’ll find frameworks for tying training metrics to business results, honest takes on where AI is (and isn’t) delivering, and advice for choosing tools that actually serve your objectives.

Thank you to our contributors for sharing your experience and opinions; your voices are what make this release a must-read for the Customer Education community.

Happy reading!

Sincerely,
The CloudShare Team

CEd ROI lies below the surface.

“The connection to business outcomes becomes clearer when learning data is read together with product and customer data.”

Roberto Aiello

Senior Learning Experience
Designer, Personio



In WellCEd 2.0, we highlighted Customer Education's undeniable role as a profit center. However, the results of successful CEd programs do not always translate into clear metrics. All too often, companies need to dig deeper into the data to link business outcomes back to investments in training.

We wanted to get to the bottom of the ROI question, so we asked CEd leaders:

Q. What training metrics are companies measuring, and how do they tie these metrics to business outcomes?

Most companies still track what's easiest to measure, but the experts overwhelmingly agree that the most valuable insights come from connecting learning data to product usage and customer behavior.



Most companies still measure surface-level training metrics like completions, attendance/engagement, and satisfaction.

Those are easy to track, but they don't reliably connect to business outcomes.

The teams doing this well focus on leading indicators.

- **Time to value** – Are customers gaining confidence quickly and reaching an early milestone or “aha” moment?
- **Product adoption** – Are customers using the features tied to their role and core job to be done? This is one of the strongest predictors of renewal and expansion.
- **Support deflection** – Can customers self-serve when they hit friction? Strong education reduces cost to serve while improving the overall customer experience.

The ability to tie training to business outcomes comes down to measuring the right leading indicators and designing learning interventions and workflows with those outcomes in mind from the start - not after the content ships.



Kristine Kukich’s CEEd Metrics to Outcomes Chart

CEd Metric Category	What It Proves	Business Outcome
Participation	Coverage	Faster Onboarding
Engagement	Relevance	Adoption and usage
Knowledge Gain	Capability	Fewer errors, fewer tickets
Product Usage	Behavior change	Retention and expansion
Support Deflection	Cost Reduction	Scalable growth
Retention/MPS	Customer value	Revenue protection
Monetization	Direct ROI	New revenue



Many organizations still use few meaningful training metrics beyond completion rates, cost per employee, and basic CSAT. Those enlightened organizations that do apply meaningful metrics look at three core aspects of training: efficiency, effectiveness, and business impact.

Efficiency is addressed by the aforementioned metrics. Effectiveness encompasses knowledge gain, accreditation attainment (badges and certification) and behaviour change.

Determining business impact as ROI is very challenging. However, metrics such as time to competency, performance impact, and employee retention rates are more attainable.



From our experience, companies typically measure training performance across three primary categories: **participation and engagement, learner perception, and learning effectiveness**. Each category provides indicators that can be directly tied to business outcomes.

Participation & Engagement Metrics

We track how many learners start a course, complete a course, and complete multiple courses. When these indicators are aligned with product adoption and support data, they help us **understand correlations between training participation and customer outcomes**. For example, by comparing churn and retention rates for learners who complete courses versus those who do not, we can assess the impact of training on customer longevity and overall product usage.

Learner Perception Metrics

Using surveys, we measure CSAT, NPS, and perceived value of training. These scores allow us to compare product CSAT, NPS, and perceived product value between trained and untrained customers.

This analysis helps determine whether training influences broader customer sentiment and satisfaction with the platform.



From what I see, many companies still begin by measuring what is easiest to track.

Common metrics include enrollments, completion rates, time spent in training, and satisfaction or helpfulness scores. These mainly describe training consumption. They tell us whether content is being used and how it is perceived, not whether it is making a difference.

More experienced Customer Education teams treat these numbers as signals, not as proof of success. At Personio, for example, we use a helpfulness score that answers a simple question: Do I feel confident using the product after this training? Confidence is not a business metric, but it is a meaningful proxy for readiness.

When learners report high helpfulness, it usually indicates they are prepared to move forward, not just that they liked the course.

The connection to business outcomes becomes clearer when learning data is read together with product and customer data.

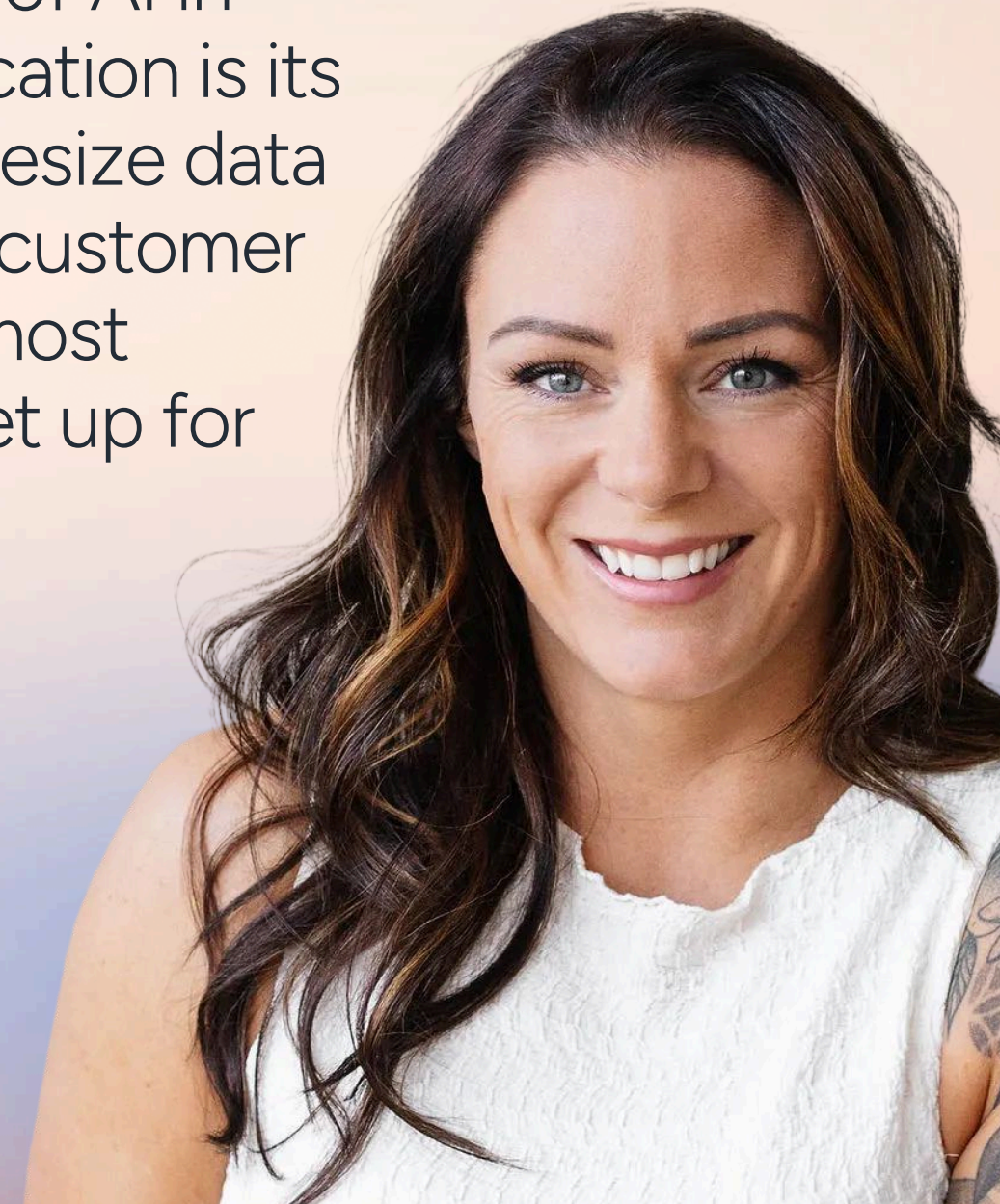
Learning Effectiveness Metrics

Assessment scores, pass rates, and badges earned provide insight into how well learners are absorbing key concepts. We can then compare feature adoption and usage patterns between participants and non-participants to identify whether training contributes to more effective use of the platform. **Pre- and post-training comparisons also help us understand how behavior changes as a result of training.**

AI expectations meet reality.

“The real value of AI in customer education is its ability to synthesize data across the full customer lifecycle, and most teams aren’t set up for that yet.”

Samantha Murray
Founder and CEO,
AlignedCX



AI remains a hot topic in Customer Education, but sentiment is shifting. As more companies experiment with different AI use cases for learning, expectations don't always align with reality.

Last year, many of our experts predicted AI would vastly improve speed of support and the level of personalization. We asked them to revisit those predictions:

Q. In 2025, how have you seen (or not seen) these projected benefits in practice?

The overall consensus is clear: we are still in the early stages of AI-powered support speed and personalization, with high potential for transformation as these capabilities continue to develop.



Samantha

In practice, I don't think we've fully seen those predictions materialize yet.

AI has improved speed at the margins with basic support automation. But true personalization remains rare. Most "personalized" learning today is still rules-based or segmented, not genuinely adaptive. To get there, organizations need to invest in data architectures that turn fragmented signals into coherent, actionable insights that can actually drive orchestrated experiences. The real value of AI in customer education is its ability to synthesize data across the full customer lifecycle—product usage, support interactions, learning activity, and success milestones—and most teams aren't set up for that yet. That's the gap between the promise of AI and what we're seeing in practice today.



Shannon

AI is certainly transforming the education landscape, but I don't think quite at the pace we thought it would.

There are a lot of barriers to adoption—lack of governance, security reviews, budget, know-how, and data integrity. So we are starting to see some of the impact around speed of support and personalized learning experiences, but I think we'll actually realize more of that in 2026.



Roberto

The projected benefits of AI have materialized, but in a more incremental and practical way than many initially expected.

On the support and delivery side, the biggest improvement I've seen is in content velocity, rather than a radical shift in how education works. In the product itself, AI-generated overviews for reports make it easier for customers to understand their data quickly, which indirectly reduces the need for support and explanations. In that sense, AI improves support not by answering more tickets, but by preventing some questions from being asked in the first place. Truly impactful, low-effort personalization is rare in practice. I haven't yet seen personalization mature enough to be broadly transformative without adding complexity for teams.



Dave

I'm seeing the emergence of tooling that can personalize content.

An example is SundaySky, an application initially more targeted toward CS teams. But imagine taking some stock learning content that your Customer Education team produces and embedding it into a personal video, which pulls in information from your CRM, adds a video message from a CSM, and delivers that to a customer's inbox. With tools like this, we can actualize workflows around common patterns.



Lynn

The path to AI personalization in learning is very much a goal for us. We want to offer our learners predictive, individually-optimized learning experiences that directly correlate with business performance metrics where learning objectives, competencies, and outcomes are intrinsically linked.

We have a lot of elements to support this with our catalog today: role-based, structured learning content and virtual labs that provide guidance based on learning results. Our next step is to explore how AI can dynamically adapt learning pathways based on real-time performance data and behavioral patterns.

While AI-powered support speed and personalization have yet to reach their full potential, AI has proven useful to Customer Education teams in other processes, like content creation. To capture the full spread of use cases, we asked our contributors:

Q. Have you found any major, unexpected benefits of AI in CEd?



Roberto

One less talked-about benefit I've seen this year is how AI supports decision-making.

When aligning learning paths with activation milestones, AI is useful in synthesizing inputs, comparing options, and stress-testing assumptions.



Using AI to generate initial learning objectives, course outlines, and transcript drafts allows instructional designers and subject matter experts to start from something concrete rather than a blank page.

This has significantly reduced iteration cycles and helped us keep pace with rapidly evolving SaaS products.

AI-driven **video creation** has also been a major productivity win. Tools like avatar-based video generation have reduced development time by around 60 percent, allowing us to clear backlogs and publish updates much faster.



Lots of content creation tools, and some of these are good for speeding up production of simple 2-3 min product videos.

We have also begun leveraging Copilot for analysis — for instance, to analyze whether factors like class size and implementation impact NPS scores.



The latest AI capabilities have enabled us to design much more scalable programs in less time, helping us deliver greater impact without increasing resources.

For example, using Guidde AI, ChatGPT, and NotebookLM, our team of just two people created 90 how-to video tutorials in only 3 weeks, compared to just 34 videos over 3 months using our previous tools.

The scale tips toward self- paced.

"On-demand, self-paced learning is very scalable. But not everything is best learned through self-paced, and some tools and technologies are so complex that it can be hard to learn the nuances through on-demand learning."

Shannon Howard

Head of Thought
Leadership, Intellum



Conversations about which digital training delivery method remain top of mind for Customer Education professionals. Self-paced (on-demand) training is often a more scalable, flexible, and cost-effective format than VILT. But the right delivery method depends on the training's audience and objectives; there is no one-size-fits-all solution.

To continue the debate, we asked CEd leaders:

Q. What trends are you seeing, and what should customer education teams consider when deciding on a training delivery method?

Opinions vary, with some leaning heavily toward self-paced, others advocating for live instruction, and a few recommending a hybrid solution.



At Mediaocean, demand is still large for VILT and we look to prioritize it where possible when building solutions.



The C-Suite usually prefers self-paced training because it's cost-effective.

When you're dealing with international customers, it's easier to do self-paced training across all time zones. But the reality is, people still want human contact. They get that through VILT because, when it's done right, they can talk to each other. Customers love talking to other customers to learn how they are doing a similar job. Social learning is becoming more important in the age of AI.



The overwhelming trend is toward self-paced, on-demand learning.

In our environment, only around 5–10 percent of consumption is VILT, with the rest being on-demand. Learners increasingly want immediate access to a specific piece of information at the moment of need, rather than committing to a scheduled session.



I see very little instructor-led training in the mid-size and enterprise spaces where I work, because of the scalability factor.

When I do see it, it's more for the white glove tier of customers that are often paying for customized material and personal delivery. I still see organizations moving from VILT to self-paced, and of course now there's the introduction of agentic delivery, which I expect to see more and more of over the coming years. In any case, choosing delivery methods should always depend on the "who, what, and why" of your program, as each method has unique benefits and challenges.



One of the biggest trends we are seeing is that customers do not want to choose between VILT and self-paced education.

They want a blended learning experience that gives them the flexibility of self-paced courses for foundational skills, live sessions for hands-on application, community spaces for peer reinforcement, and ongoing micro-learning for updates and quick refreshers.



What I have observed is that some businesses lean on VILT for working with Enterprises when focusing on adoption or re-engagement.

The caveat is that I also see these businesses neglect the role of on-demand material. To be bold, we should always start with on-demand and use VILT for more intricate engagements where we want learner participation. If you're not scaling, you're failing, and VILT does not scale.



On-demand, self-paced, learning is very scalable.

But not everything is best learned through self-paced, and some tools and technologies are so complex that it can be hard to learn the nuances through on-demand learning. With VILT, you have this real-time learning environment with other people who are doing the same job as you, and you're able to learn from each other. Giving people opportunities to ask questions and interact keeps them engaged.



The broad trend I'm seeing is a continued shift toward self-paced education as the default.

A self-service academy scales better, removes scheduling friction for customers, and reduces the operational load on the education team. It also makes it easier to keep training aligned with product changes. That said, live delivery still has a role. In many organizations, VILT is chosen when: the audience is small enough to justify the effort, or strategically important; there is a need for higher-touch enablement (complex workflows, high stakes use cases, change management); the goal is not just "knowledge transfer" but confidence-building through interaction, Q&A, and real-time troubleshooting.

Learning by doing drives adoption.

“We actually learn best by making mistakes—not by clicking a bunch of boxes in your learning, but by actually doing it in product and making mistakes. That’s what’s really going to drive adoption.”

Debbie Smith
President, CEdMA



Training that doesn't change behavior won't improve adoption. The question today is how to make learning stick, driving lasting behavior change. We asked the experts:

Q. What best practices can you share for making learning memorable and improving adoption?

While views on micro-learning and personalization differ, everyone agrees that improving adoption starts with understanding your customer and what they're trying to accomplish.



To ensure learning is effective and fully adopted there are some basic principles CEd teams should follow.

- **Fully understand your audience.** Learn their skill levels and pain points and apply practical and meaningful use cases.
- **Set clear goals and metrics.** Identify the objective of the learning and determine how you will know if it has been achieved or not.
- **Incorporate micro/bite-sized learning.** This reduces information overload and enables individuals to learn at their own pace, around their work commitments.
- **Include hands-on practice that reflects real life.** Approaches include quizzes and capstone projects, ideally with rewards and recognition, such as 'badges' that are visible to peers and managers.
- **Provide continuous and ongoing support.** Learning should not be a single event at a point in time. On-demand resources, such as FAQs, tutorials, support guides etc, plus follow-up sessions and feedback opportunities should be applied.



Use micro-learning, real-world practice, and spaced repetition to keep skills fresh and prevent decay over time.

Adaptive learning. Use data signals—like declining assessment scores, reduced engagement in practice activities, or performance gaps in on-the-job metrics—to identify when a learner’s proficiency is slipping. AI can then trigger targeted refreshers, simulations, or recommendations to help learners revisit and strengthen those specific skills before erosion takes hold.



It's vitally important to create modular content which can be leveraged to articulate custom programming.

Some learners don’t need “everything and the kitchen sink”. You can keep customers engaged by delivering what they need, not everything all at once. And speaking to that, I strongly advocate for campaign-like programming. That means you may have drip campaigns, targeted campaigns, etc. just like Marketing would do. If you have the tools to craft automated, targeted campaigns that learners actually need, you can often get their attention.



Making content memorable and making learning stick are different things.

You can make really cool, fun videos that people remember, but videos are passive learning. Reading is active learning because you have to process and think about the words. But what really solidifies learning is hands-on activities. We actually learn best by making mistakes—not by clicking a bunch of boxes in your learning, but by actually doing it in product and making mistakes. That’s also what’s really going to drive adoption.



Today, most learning still focuses on knowledge transfer rather than behaviour change.

Moving toward performance-based assessment and validation is key, even though it requires more effort. Passive consumption alone does not drive adoption. Personalization is frequently overhyped. While recommendations can help learners discover relevant content, fragmenting courses too much undermines instructional design and learning objectives. In many cases, clarity and relevance are more important than choice.



One of the most important best practices is keeping the focus on business outcomes.

Learners need to understand what they will be able to achieve as a result of the training, not just see a collection of disconnected learning pieces. Time has always been a challenge, and it is becoming even more critical now. This means we need to create early value and strong needs alignment. Micro-learning, personalization, and ongoing support beyond the course itself are key ways to do that. When learners feel that the content fits their goals, respects their time, and continues to help them after the course is done, adoption naturally improves.



There are rumblings that micro-learning may not be the best solution for creating memorable experiences that improve adoption. My discussions this year have focused on segmenting audiences into at least three bins: casual users that leverage in-app tools best, power users that may never leave an application from the start of their day, to the end, and system administrators that set up and implement applications. Starting there allows for personalizing the learning paths based on the tasks required.

AI presents challenges and opportunities in 2026.

"The most successful learning leaders today will be those who become strategic translators, connecting emerging technologies to measurable business outcomes."

Lynn Marie Viduya

Vice President, Global
Education Services,
OneStream Software



Predicting what the future holds for customer education is no small feat. However, clear patterns emerge in the experiences of the people providing training every day. So, we asked our experts:

Q. Please share your 2026 Customer Education forecast. What challenges and opportunities do you anticipate in the next year?

Two themes surfaced repeatedly: the ongoing challenge of proving ROI and securing resources, and the question of how to use AI in ways that actually move the needle.



I don't foresee the challenges changing too much. We are still in the era of proving value, educating the business on the impact of customer education, and trying to "do more with less."

"Opportunity-wise, we have just begun to scratch the surface of what AI can do for our programs. Yes, we can use AI for content creation. But we can also use it to identify high-impact opportunities for education, for data analysis, to personalize learning. The applications are vast, and we are just getting started.



Teams will still see challenges related to resources.

AI will continue to evolve and change the way we practice, and people will still be the heart of what we do, but finding the right size for teams to thrive and help an organization thrive will still be difficult.



Customer education has a long standing challenge of proving its value. I think that in 2026 we need to ensure that AI helps to drive that value and not detract from it.

Customer education is sometimes viewed as just developing content, and the value of the content is overlooked. If we are going to continue using AI for speed and amount of content development, and we're looking at the wrong type of metrics, we will detract from what education provides: real behavior change for your audience.



The convergence of AI capability and market pressure creates a unique window where training and enablement can establish itself as a strategic business function. Organizations that successfully balance innovation velocity with learning rigor will capture market share by enabling faster time-to-competency for their teams and customers. The key challenge is developing AI-augmented learning frameworks that first meet learner outcomes while delivering the speed and scale that business demands. Companies that master this balance will create sustainable competitive advantages through effective knowledge transfer and application.



- AI-enabled automation roles coming to Customer Education teams
- Smaller in-house CE teams
- Decreasing engagement with formal material
- New tools and more confusion about which ones to use
- More use of in-house AI and teams navigating how to effectively use it to build programming



Let's move beyond the "AI will replace me" mindset, and focus on how we can leverage AI tools effectively and focus on the real value, which is in learning how to adopt and apply AI in strategic ways and positioning ourselves as AI tool adoption experts.



We have an opportunity to really start doing true personalization, but that opportunity brings some challenges.

We need to understand what data we can use and where we can get the data. This becomes especially important as we start building Agentic AI. More companies will hire for this type of systems thinking. We also cannot wait until we have perfect data; we have to start developing differently now. We need to build all content in small reusable blocks that can be used in courses, community, customer emails, and in-product.



Challenges for CEd, which are not necessarily new, include the need to be relevant, effective, and impactful.

These challenges stem from quickly changing technology, increased remote work, and unvalidated (by a human) AI-generated content. CEd has many opportunities in 2026: hyper-personalization via AI, proactivity through adaptive learning systems, shifting from a 'content first' to a 'skills first' approach, and designing learning 'in the flow of work.'

Choose your CEd tools intentionally.

"Getting people's hands on the product is vital, so VILT and simulation solutions should be on your list of must-haves."

Dan Braithwaite

Senior Director of Product
Training, Mediaocean



Customer Education teams have no shortage of tools available for content creation, learning delivery, analytics, and other essential functions. But not every tool adds value, and an abundance of tools can become a distraction.

We wanted to cut through the noise, so we asked the experts:

Q. What tools do you think will become or continue to be important for Customer Education teams in 2026?

The biggest takeaway here? Choose tools that tie directly to your Customer Education strategy and objectives.



Content management tools will become important as we look to centralize our content for easy distribution across our solutions. Getting people's hands on the product is vital, so VILT and simulation solutions should be on your list of must-haves.



Content creation and maintenance tools remain must-haves, but the emphasis shifts from producing new formats to keeping content accurate, consistent, and easy to update.

Another essential area is visibility and analytics. Not complex dashboards for their own sake, but tools that allow learning signals to be read together with product and customer data.

Simulation tools also deserve more attention. In contexts where customers cannot safely experiment in a real product environment, even lightweight simulations with hotspots or guided interactions can be very effective. They allow customers to feel "inside" the product without the risk of breaking something in a production instance.



A robust LMS remains foundational, alongside a hands-on lab platform that allows learners to work with real environments.

AI-based video generation tools and a general-purpose LLM for drafting and proof-reading content have become essential to operate at scale.



Must-haves are platforms that centralize content and knowledge so it can be reused and published across multiple surfaces in the customer journey: in-product, help centers, onboarding flows, support, and increasingly AI-powered experiences. Just as important is the ability to extract performance insights from that content to understand what's driving adoption, time to value, and self-serve success.



Community will continue to move from a nice-to-have into a true must-have for Customer Education teams in 2026.

Community gives learners a place to go beyond the course itself and connect with real use cases, shared solutions, and peer collaboration. This is critical for helping customers move from simply completing a course to actually applying what they learned in meaningful ways.



Any tech should really be in support of what you're delivering.

If, for example, you have a program that would best be served by delivering virtual labs, you should have the right virtual labs software. If you need to upskill partners across multiple languages, multiple regions, you need a solution that can handle that localization at scale. Start with identifying which outcomes you need to drive before deciding which tools to implement.



The current tooling landscape reflects a critical strategic inflection point. While content creation tools like Rise and Synthesia accelerate content creation, and practice environments like CloudShare enable experiential learning, the real value emerges from integrated ecosystems rather than point solutions.

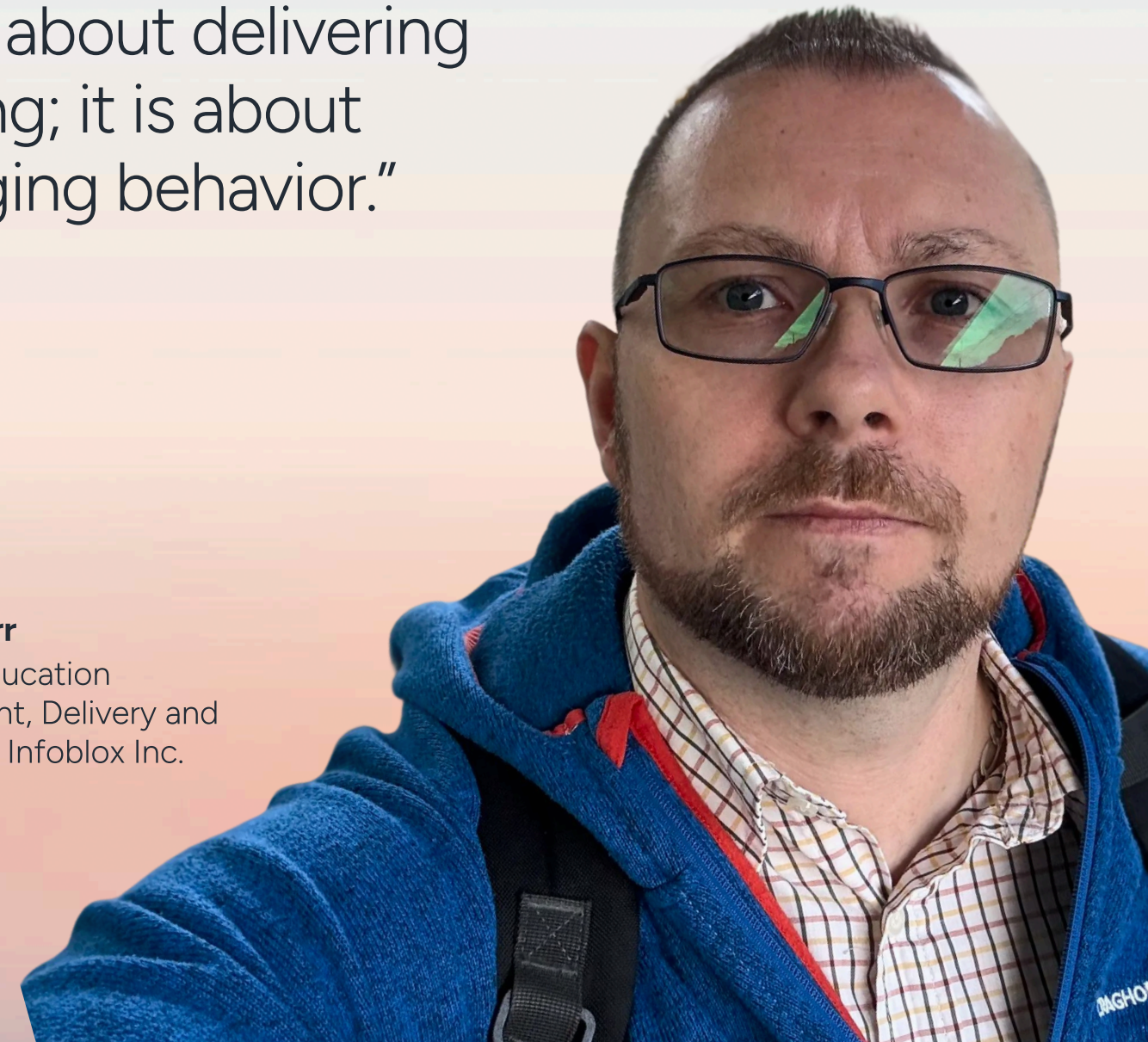
The strategic imperative is building technology stacks that scale with organizational complexity while maintaining the learner-centered design principles that drive engagement and retention. This approach positions learning teams as strategic business enablers rather than operational cost centers.

Advice Column

"Customer Education is not about delivering training; it is about changing behavior."

Steven Carr

Director, Education
Development, Delivery and
Operations, Infoblox Inc.



Every one of these Customer Education experts stays sharp by constantly learning, problem-solving, collaborating, and sharing their knowledge and findings.

We asked each influencer to leave readers with a piece of advice, and here's what they said:



Design learning as part of the customer journey, not as a separate destination.

Start from what the customer needs to do next, help them do it with as little friction as possible, and be comfortable saying no to anything that doesn't serve that goal. Clear priorities, good structure, and respect for the learner's time will always outperform more content, more features, or more complexity.



If you haven't already, get involved within communities to listen to and learn from others.

Customereducation.org and CEdMA are fantastic spaces. People in the CE community are great at sharing what works, but also—and sometimes more importantly—what didn't work or what went wrong.



Customer Education is not about delivering training; it is about changing behavior.

Content, modality, and technology only matter insofar as they help customers adopt products faster, use them more effectively, and realize measurable value. Teams that stay focused on outcomes rather than activity will be the ones that succeed in 2026.



Know the problem you're solving with education and target your programs accordingly.

If you're targeting a program to drive certain results, then you know what material to train on, who you're educating, the metrics you're looking for, the type of tools to use. Everything else fits into place when you target your programs around specific business problems or opportunities.



Don't stop telling the story and building internal relationships.

Yes, you need to produce meaningful, impactful work and prove the impact. But relationships and storytelling help position customer education as an invaluable, irreplaceable function. This is a key part of the role—don't let it take a back seat to other projects & initiatives!



Yes, we can tie customer education to retention.



If you're resisting using AI, please stop and invest your time in learning what's out there.

Businesses are not going to have patience for those who continue to use traditional methods to create learning material.



While embracing the diversity of learning modalities and the application of tools such as AI within CEd it is essential, with all the 'razzle dazzle' these bring, to not lose sight of the key considerations that underpin learning.

Learning must align with business strategy and goals. You must identify and focus on the critical skills and competencies needed to achieve business objectives. Regularly evaluate and refine learning offerings to ensure they are effective and meet customers' needs. Finally, encourage employee participation in learning and development programs to foster a culture of continuous learning.



Stop measuring learning. Start measuring the behaviors that lead to value.

The teams seeing real impact treat education like a product: they experiment, measure behavior change, and iterate. With the right frameworks and tools, learning becomes something you continuously optimize against outcomes, not something you hope customers remember later.



Really tie your learning to the jobs to be done. Focus on tasks, not on topics.

If you're focusing on topics, you're focusing on knowledge, not on what a user needs to do. This is not actually helping anyone learn.



The most successful learning leaders today will be those who become strategic translators, connecting emerging technologies to measurable business outcomes.

Rather than chasing technological trends, focus on building learning organizations that can rapidly evaluate, pilot, and scale innovations based on learner impact and business value. Establish clear success metrics that tie learning interventions to revenue, retention, and other performance indicators. This evidence-based approach to innovation positions you as a strategic partner while ensuring that technological advancement serves human potential rather than supplanting it.



One of the most important things I have learned recently is that Customer Education leaders need to be thoughtful about how we integrate new technology.

AI can help us scale and work faster, but we still need human guidance and mentorship in the moments where it truly matters. The real magic happens when we blend both.

Key Takeaways

Measure what matters, not what's easy.

Completions and satisfaction scores are easy to measure, but don't tell the full story. Metrics like time to value, product adoption, and support deflection reflect actual behavior change, which drives renewal and expansion.

Content relevance beats volume.

More content doesn't necessarily lead to better outcomes, and too much can create distractions that negatively impact your customers' learning experience. Content tailored to your customers' roles and specific objectives is what moves the needle.

Speed is the current AI advantage.

While AI-powered personalization and support are still developing, the real wins are in velocity. AI speeds up essential functions such as ideation, content production and delivery, and data-informed decision-making.

Tools serve strategy.

As new tools constantly become available to Customer Education teams, discerning which ones will truly add value is imperative. Choose tools that directly support your strategic objectives, and ignore the rest.

Self-paced scales and VILT connects.

On-demand training is an efficient and cost-effective choice for large-scale learning in globalized organizations. However, VILT continues to play a role in complex software training, real-time problem-solving, and community building.

Successful Customer Education is outcome-driven.

Customer Education is a strategic investment, and training programs should reflect that. Start with who you're training, what they need to accomplish, and how that outcome will drive business results. Tools, content, delivery method, metrics, and the rest of your strategy will follow.



About CloudShare

CloudShare is a trusted virtual hands-on labs platform that has powered training and sales environments for the world's largest Enterprise companies since 2007. With CloudShare's flexible, browser-based platform, global organizations enable participants to gain hands-on experience in immersive software environments, resulting in deeper retention, higher engagement, and real business outcomes.

CloudShare's industry-leading set of instructor tools, including over-the-shoulder view, participation and activity metrics, in-app chat, and guided content journeys, reflects its proven track record of technological excellence, innovation, and reliability serving global software companies such as Salesforce, Atlassian, Motorola, Palo Alto Networks, and Ping Identity.

To learn more, visit www.cloudshare.com.