CUSTOMER TRAINING LAUNCH

Phase 1: Foundation and Strategy

Lay the groundwork for a successful training program.

● **Define Goals**

Identify primary objectives (e.g., reduce support tickets, increase feature adoption).

Define measurable KPIs (e.g., CSAT score, number of support cases, product usage metrics).

● **Identify Audience**

Map out primary customer personas.

Determine levels of knowledge and training needs.

● **Select Platform**

Choose a Learning Management System (training platform – e.g., iSpring LMS)

Confirm that the platform integrates with your tech stack (e.g., CRM, SSO).

● **Plan Content Strategy**

Decide on content formats (e.g., knowledge base, video tutorials, webinars).

Create a high-level content roadmap and curriculum outline.

Phase 2: Content Development
Create engaging and effective training materials.

● **Develop Core Modules**

Create product onboarding and setup guides/videos.

Develop "Best Practices and Tips" tutorials.

Build "Troubleshooting FAQs" and knowledge base articles.

Prepare training programs for new features and upgrades.

Create interactive slides and screencasts.*

Develop quiz modules to assess knowledge and engagement.*

Record and produce role-play simulations for complex tasks.*

● **Ensure Quality and Branding**

Apply brand guidelines (logo, colors, fonts) to all content.

Conduct internal reviews and Q&A for all training materials.

Ensure that the content is accessible.

*This can be done quickly and efficiently using iSpring Suite, which allows you to create slides, record screencasts, and build quizzes directly in PowerPoint.

Phase 3: Program Setup and Logistics

Build the structure and pathways for your learners.

● **Configure the LMS**

Set up and brand your training portal (with iSpring LMS, for instance).

Organize content into logical courses and learning tracks.

Configure user roles, permissions, and automated enrollment.

● **Establish Engagement**

Set up certificates and badges for course completion.

Plan an email sequence to welcome and guide new learners.

Phase 4: Pre-Launch Preparation

Test everything before going live.

● **Internal Alignment**

Train the Customer Support and Success teams on the new content.

Brief the Sales team on how to promote training to new customers.

● **Beta Testing**

Invite a small group of loyal customers to a pilot program.

Gather feedback on content clarity, usability, and platform experience.

Make final adjustments based on beta feedback.

● **Final Checks**

Test all links, quizzes, and video playback.

Proofread all public-facing text and instructions.

Phase 5: Launch and Promotion
Go live and drive customer enrollment.

● **Marketing**

Announce the program launch via email and in-app messages.

Promote the training on your website, blog, and through social media.

Equip Customer Success Managers to personally invite key accounts.

● **Go live**

Officially open the training portal for enrollment.

Monitor the platform for any technical issues.

Phase 6: Post-Launch and Optimization
Measure success and continuously improve.

● **Monitor and Analyze**

Track KPIs, as defined in Phase 1, against your baseline.

Use LMS reports (e.g., iSpring LMS analytics) to monitor progress.

● **Gather Feedback**

Send out post-course satisfaction surveys.

Create a channel for ongoing customer feedback and requests.

● **Iterate and Improve**

Update content regularly to reflect product changes.

Use data and feedback to expand and refine the training curriculum.

With iSpring Suite to build interactive training content rapidly and iSpring LMS to deliver it effectively, you have everything you need to ensure that your customer training program is a resounding success.

Book a live demo to see how iSpring solutions can help you achieve your training goals.

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