

7 WAYS TO DRIVE CUSTOMER EDUCATION PROGRAMS  
WITH ADOBE EXPERIENCE MANAGER SITES, ADOBE  
CAPTIVATE PRIME AND MARKETO ENGAGE

||Engage your customers|| Use a personalized approach ||  
Increase customer retention and renewal|| Decrease  
support costs||

**ABSTRACT**

Engage your customers with personalized training content. Equip them to better adopt your products/services, thereby driving predictable retention and upgrades. Use Adobe Experience Manager (AEM) Sites, Adobe Captivate Prime and Marketo Engage to drive more effective marketing of training for your customers. Track consumption behavior to generate insights, score leads and drive stronger upsell and retention marketing campaigns.

[Adobe Captivate Prime Product Management](#)  
A 2020 White Paper



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# Customer Education and Product Adoption

Organizations the world over are increasingly moving to a business model that is driven by a subscription/annual recurring revenue mindset. In this kind of business scenario and with the rise of competition brands, customers always have the option to walk away from you unless they are happy with your product /service and are satisfactorily using it. Therefore, it is critical for organizations to drive product adoption, and eventually recurring revenue as a critical business goal.

A critical component of driving product adoption is providing customers with appropriate “education” that ensures they are well equipped with the knowledge they need to derive maximum value from your products/services. This becomes even more important as your offerings develop and increase in complexity, and more attention needs to be paid to how customers get started and adopt and evolve alongside.

Driving product adoption through targeted personalized customer education initiatives has the following benefits:

- 1. Increased customer renewal rate (as satisfied customers stay loyal).
- 2. Increased customer satisfaction and improved referral opportunities.
- 3. Improved brand health when you send the message that you are invested in customer success.
- 4. Increased upsell and cross-sell opportunities amongst your customer base.
- 5. Decreased product support & customer success costs as customers learn to help themselves.





## Benefits of Customer Education to You

- Better adoption and use of your product
- Increase in subscriptions
- Customer retention
- Ability to upsell and cross-sell
- Brand loyalty and enhanced brand perception
- Increase in recurring revenue

**Brand building:** Use customer education to create awareness and promote your products.

**Increase adoption of product:** Educate customers in the use of the product and so increase usage.

**Upsell & Cross-Sell:** An educated customer who engages well with your product is more open to trying or adopting newer versions of the product

or other related products in your repertoire.

**Customer retention:** A customer who is familiar with your product is more likely to stay with it and with your brand.

**Subscription renewal:** Shift of focus from constantly generating new leads, to retaining and renewing old or existing customers using the subscription model.

It can be frustrating when you have a variety of products and/or product features that your customers cannot or do not use well. If you have a product that requires a little extra comprehension of its depth and complexity, then it behooves you to educate your customers about the benefits, the uses and the values it can deliver.

When you educate or train your customers, you give them an in-depth knowledge of your product(s) and help them build a relationship with your brand. Powerful training programs teach your customer best practice uses of your product therefore better enabling them to do what they do. Carefully and simply structured customer education can earn you customer loyalty, customer retention, and increased revenue. Retaining customers is not only beneficial for a brand's public image, but it also directly reduces the need to invest in attracting new customers, while simultaneously increasing revenue.





## Customer Education Lifecycle

Generally, customer education occurs post sales. Once you sign your customer, you educate them on the best ways to use your product. This usually leads to opportunities to identify product usage behavior and upsell and cross-sell other products and benefits.

In certain industries customer education can work well in the pre-sales motion too – where the intent of the prospect can be measured and scored based on their consumption behavior of educational content. This information can be used to prioritize the prospects and close deals faster.

Once the product is bought, post sales customer education becomes a part of the package. Give customers paid subscriptions to your education portal where they can regularly seek and gain training.

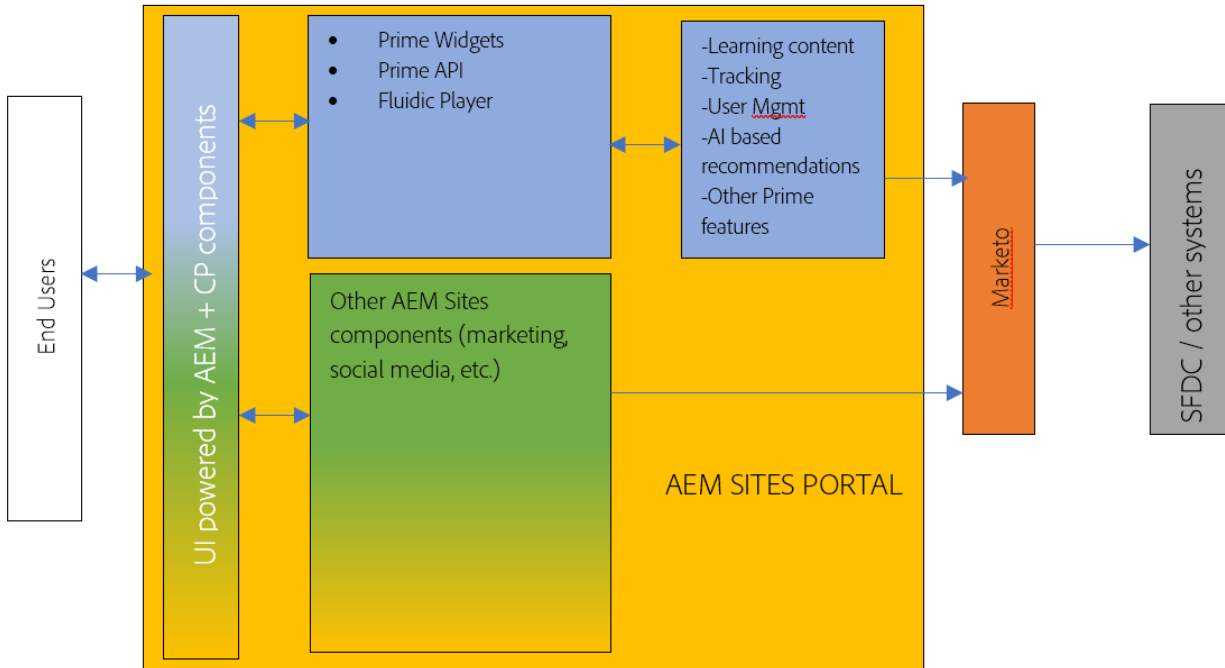
Whether you use customer education pre- or post-sales, the goals are the same: to drive product adoption, create brand awareness, increase customer subscriptions, retention, and brand loyalty, and ultimately to increase revenue.

## How can Adobe help?

Traditionally, customer education initiatives have typically involved some basic non-interactive content such as videos or blogs or static content like a brochure delivered to customers using a static portal, SharePoint or other repository-based approach. This approach has several limitations when it comes to addressing the need for personalization, integrated marketing solutions, and several other customer focused strategies.

Adobe now offers a comprehensive customer education solution built with Adobe Experience Manager Sites, Marketo Engage and Adobe Captivate Prime LMS. AEM Sites is the world leader in building great custom digital experiences that organizations leverage to drive marketing initiatives that deliver tailored experiences to their customers. Marketo Engage is the industry standard in marketing automation software that intelligently scores leads and delivers marketing campaigns with a very high degree of personalization. Adobe Captivate Prime is an award-winning learning platform that helps you design, deliver and manage personalized learning experiences. A combination of these enterprise systems working in tandem provides a comprehensive solution to building a customized training portal. Adobe Captivate Prime acts as the central content and data repository, with AEM Sites offering the front-end experience and Marketo Engage powering campaigns based on insights that flow seamlessly across these systems.

Captivate Prime can be integrated within AEM Sites in a “[headless LMS](#)” avatar. Here is an architectural diagram to explain how the systems work together to deliver powerful customer learning experiences:



## 1. Integrate Captivate Prime

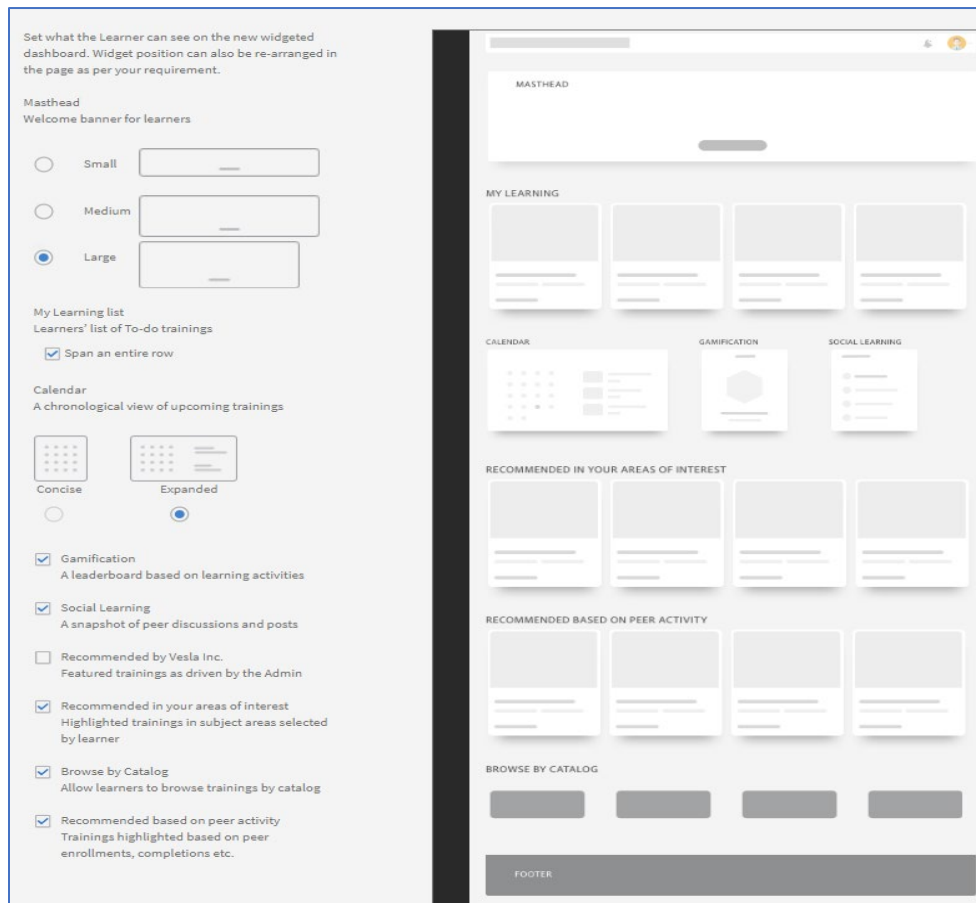
Let us explore the two possible approaches in leveraging Adobe Captivate Prime:

1. [A granular approach](#) that involves the use of Prime API to power any and all possible workflows such as Search, Browse, Get Recommendations and even consume trainings within the native website built with AEM Sites.
2. Integrate Captivate Prime building blocks natively with Adobe Experience Manager Sites using custom UI components which allow an AEM Sites author to simply drag and drop Captivate Prime widgets into any AEM Sites environment.

Captivate Prime widgets that you could embed right within the AEM Sites portal are:

- Personalized Masthead – like a welcome banner with multimedia options. A masthead can be specific to user groups and customized by the Admin.
- My Learning – this widget is a summary of Trainings recently viewed by a learner.
- Calendar – shows upcoming Classroom/Virtual Classroom Trainings.
- Gamification – displays the leaderboard with top achievers amongst the peer set

- Social Learning – shows activities and discussions involving users who are similarly grouped.
- Recommended by organization – Trainings recommended by management and targeted at specific user groups, with specified timelines.
- Recommendations based on area of interest – driven by Machine Learning algorithm that curates Trainings based on learner’s areas of interest.
- Recommendations based on peer activity – driven by a Machine Learning algorithm that curates Trainings based on what a learner’s peers take up.
- Browse by Catalog – catalogs of Trainings are displayed as tiles on the learner homepage.



Your AEM Sites portal can be completely driven by the branding and marketing considerations of your organization. Users do not have to leave the portal to achieve all necessary business benefits. And, above all, you can get started with this integration in a matter of hours rather than weeks or months.

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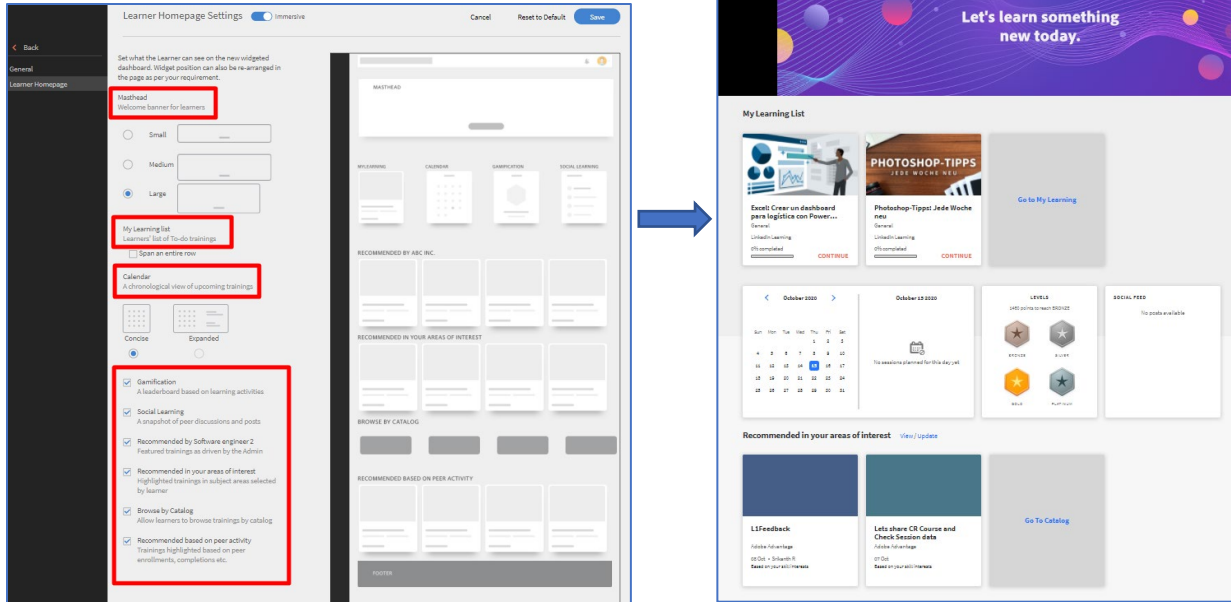


## 2. Use Adobe Captivate Prime to deliver an out-of-the-box user experience

You could completely customize the end user experience when you leverage AEM Sites and the headless avatar of Captivate Prime, OR you could implement an out-of-the-box, native user experience without the need to integrate with AEM Sites or any other CMS. You do not need coding skills to implement the native UI, just a "configuration" method. Using a "Netflix style" approach, the native UI offers learners personalized strips of recommendations based on a user's choices, peer activity, and even admin-driven "featured courses" powered by Machine Learning algorithms.

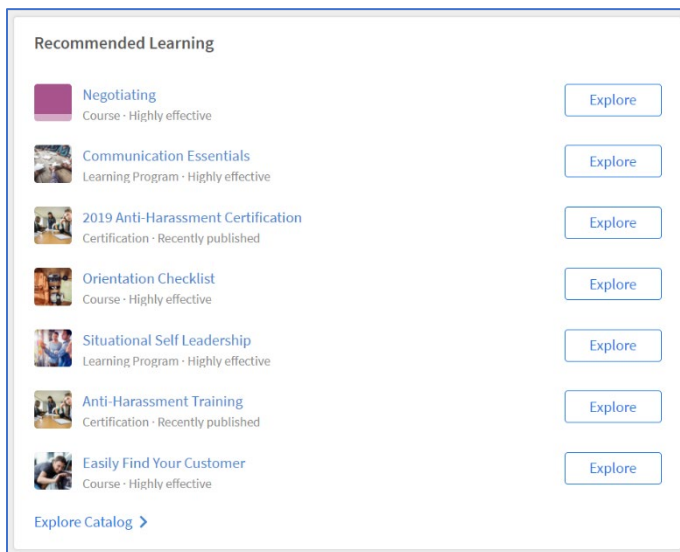
Admins can customize and personalize various elements of the native UI, e.g. you could personalize the core Masthead for different user groups, and customers from Org A see Banner A, and customers from Org B see Banner B etc. The colors of this interface can be customized to match your branding and logo, and video "Announcements" can be used to announce training initiatives. The advantage of the native customized interface is that you can take your Captivate Prime account live very quickly, in a matter of days. When time is of the essence, you could begin with the native Prime UI and then graduate over time to the fully customized portal experience powered by Captivate Prime and AEM Sites.





### 3. Personalize training

Identify the end user who logs into the Customer education portal and correlate this user to data about him/her, such as products they may have purchased from you in the past, products that they may have shown



interest in by signing up for webinars etc. Identify other data, e.g. their location and language preferences, and use all this rich metadata to offer users tailored training content and avoid throwing the whole training catalog at them. This is called “personalization of training” and it is the key to the success of your initiatives.

Personalization requires more than a simple web portal. You need a platform with a

recommendation engine that leverages AI and big data to offer the most relevant training content to end users. This ensures that as soon as a user logs into the portal, they are served up content that they are most likely to consume. Increased training consumption naturally leads to better engagement, and better-informed customers have a direct correlation with increased product adoption.

Adobe Captivate Prime leverages an AI-based recommendation algorithm that aims to enhance learner engagement and identify and address gaps in learning. The recommendation algorithm is designed to take in multiple sources of input from essentially three types of users: The learner, his/her peers in the system, and the Administrator of the platform who brings in the organization's business goals and its business data into the system.

Some of this data is explicit i.e. it is provided by the users themselves (e.g. Learner's stated areas of interest) while other data is implicit, i.e. it is deduced based on the user's actions (feedback given, scores achieved etc.). Further, the algorithm has been trained using industry data of job roles, titles, and descriptions that Adobe has sourced from its partners so that Prime can map industry-aligned skills to job titles and designations. The system also uses topic modelling algorithms to analyze the training content within an account and map them to Skills.

The system finally uses all this to match learners to specific trainings within the system in a ranked manner and thereby can recommend relevant trainings to users.

#### 4. Market training

While it is important to have the right personalized content available for customers, organizations really need to take a leaf from the marketing playbook and market their training content. Strategically marketed content ensures that customers are aware, for example, when you launch fresh content to align with product updates.

You could drive these initiatives by taking advantage of the deep integration with Marketo Engage or other Marketing Automation tools where you can create campaigns that select and target a set of users based on some criteria (e.g. all users who are customers of product A and have taken training for version 1.0 ) with campaigns to drive visits and engagement. Making these customer audience segments available within



marketing tools allow marketers to leverage insightful training data to power effective campaigns that are rich, targeted and can be tracked (emails sent, delivered, opened, clicked on) very easily.

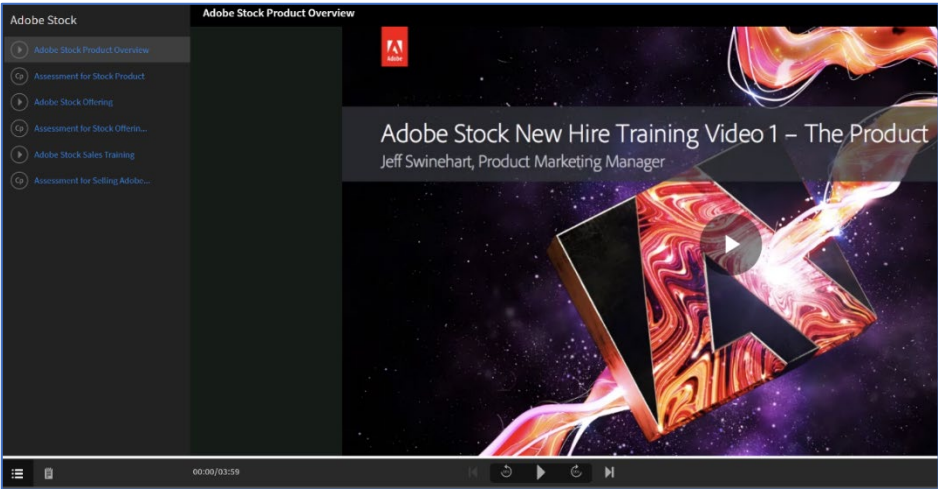
The Adobe Captivate Prime and Marketo Engage integration is designed to update or write leads to the Marketo database, for example, when new users are added to the LMS. It also maps learning behavior (course enrollment, completion, skill assignment and achievement) to corresponding fields in Marketo Engage to create audience lists (“Smart Lists”) and target audiences based on their learning behavior. The Marketo Engage connector lets you automate data synchronization that can be performed according to a schedule that you can easily configure.

The Captivate Prime and Marketo Engage integration can write data into leading CRMs such as SFDC and MS Dynamics. Marketo Sales Insights (MSI), for example, can be used to write training data to SFDC and alert sales personnel about custom “interesting sales moments”.



### 5. Support interactive content

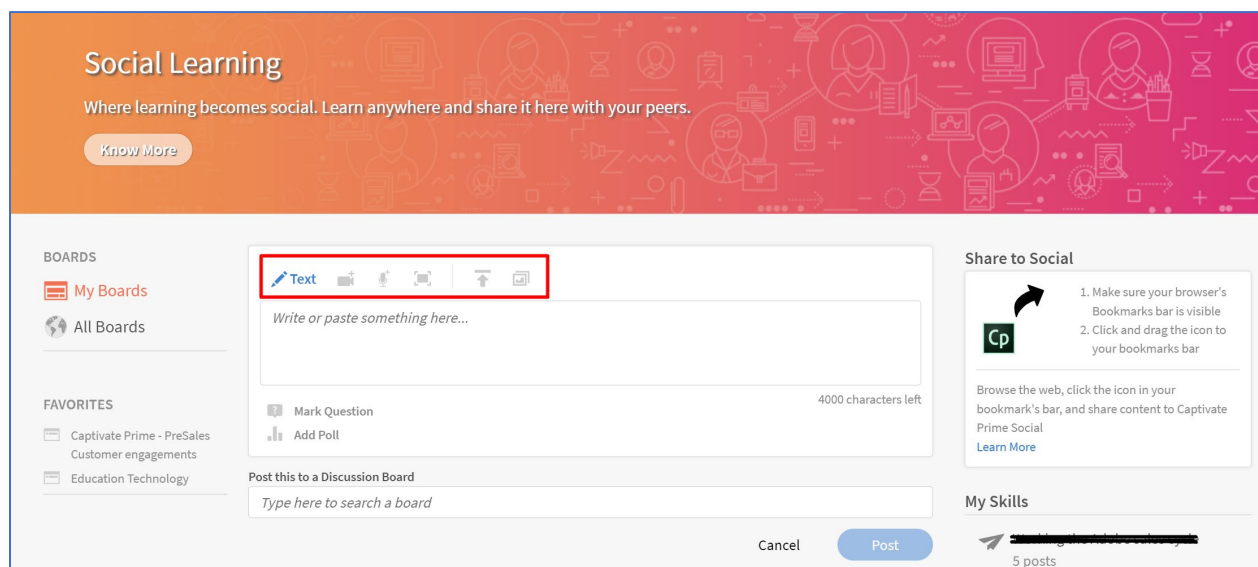
Training activity needs to go beyond passive content such as documents and videos and needs to really engage consumers with interactive content such as Quizzes, Assessments and eLearning (based on the SCORM standard). This encourages user participation in training initiatives, and additionally, when you offer Certifications and Badges, there is even more motivation for learners to stay engaged.



The fluidic player where you can see the contents of the course as it plays and toggle with the notepad view where you can make notes as you consume training

## 6. Use Gamification and Social Learning to drive customer communities

Social learning is a powerful tool to drive customer engagement. Subject Matter Experts from either within your organization or even the customer community at large can be very strong disseminators of product knowledge and an organization should leverage them effectively. Social learning discussion forums, comments, poll questions, the ability to create and upload videos, audio recordings and links are capabilities that can really foster a strong sense of customer community. Captivate Prime has built in Social Learning that offers bleeding edge technology to achieve these workflows. Customers would even be able to record their screen, webcam and audio using the UGC app to ask questions, and demonstrate a solution etc.



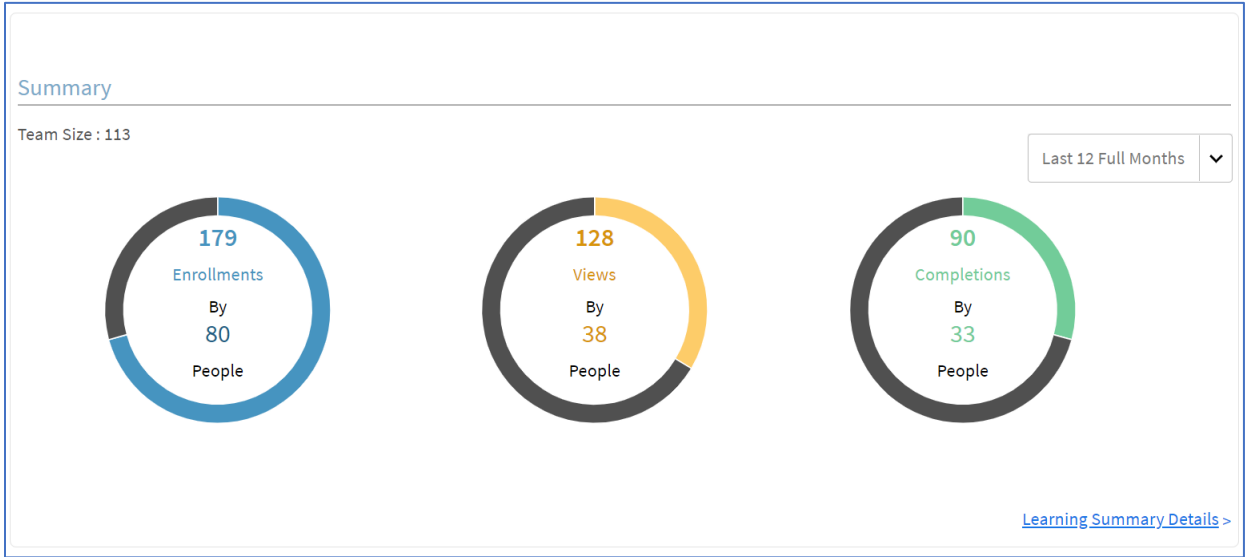
## 7. Track and report training activity to answer business questions

To achieve all the above business benefits, the training platform must be able to track training consumption to a very high granularity: e.g. track what percentage of a video has been consumed, track quiz answers as the gating factor for certifications, and track number of pages read of a pdf document. You could then make this tracking data available to the training administrators and enable them to answer questions like:

- 1) Which are my most popular Trainings in terms of enrollments as well as completions?
- 2) Which Trainings have great enrollment numbers but low completions (indicating training content issues)?
- 3) For a customer segment or even a particular customer what does the training activity look like in terms of logins, enrollments, etc.?

These questions can then direct the organization towards the right training strategy to be followed. Your learning platform needs to be able to track the training activity and then support the creation of “user groups”

dynamically based on user metadata such as customer-organization name, location, etc. to be able to slice and dice the training data on these parameters. This requires a comprehensive learning record store (a database that is tuned for such training data). Prime provides a built-in Learning Record Store (LRS) and a native reporting engine that allows you to answer such key business questions using data. Prime also allows you to export such data to data warehouses like SAP Hana using APIs or to visualization tools like Power BI using built-in connectors.



## Conclusion

Customer Education leads to higher product adoption, brand stickiness, business predictability and eventually to an increase in recurring revenues for businesses. It is no longer a “sell once and forget about your customer” scenario. A growing trend towards subscription-based models, leads to customer retention, lets you consistently engage learners and make education an ongoing active component. Therefore, for most brands and organizations, it is pertinent to implement and manage a very strong customer education platform.

The integration of AEM Sites with the Captivate Prime LMS and Marketo Engage provides a learning platform that addresses customer education from multiple standpoints, geared towards a holistic and personalized approach. A complete solution, this combination of intelligent tools serves to enhance the overall user experience, target customer education from various analytical positions, and thereby increase the likelihood of customer retention and loyalty, increase revenues, and decrease the dependence on customer support.