

# CUSTOMER EDUCATION ACTIVATION PLAYBOOK

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## Introduction

If you're building or scaling a Customer Education program, start here. This playbook walks you through how to structure your education efforts around the three business outcomes that matter most: Acquisition, Activation, and Retention.

Why it matters:

- Get executive buy-in with aligned metrics.
- Prioritize where education makes the biggest impact.
- Scale with consistency and clarity.

## How to Use This Guide

This is your go-to workbook for operationalizing customer education around real business outcomes. Use it when you're:

- Launching a new Customer Ed program
- Re-aligning existing efforts for impact
- Making the case to leadership for more resources

### How to approach it:

1. Work sequentially: Start with Section 1 and move down. Each section builds toward a full playbook.
2. Do the work inside the worksheet: Treat it like a working doc, not a template to think about later.
3. Use it in collaboration: Involve product, marketing, and CS stakeholders where noted.
4. Keep it live: Revisit quarterly to revise your focus, metrics, and content stack.