Product Education strategy for first 6 months

Over the first six months, my goal would be to deeply understand Customer.io's product and the needs of its customers (self-serve in particular), build and empower the team, and ensure we have the right resources in place to succeed. I'd focus on creating a clear, metric-driven strategy to help self-serve customers succeed and drive business growth. This phased plan would set a solid foundation for long-term impact and continuous evolution of product education at Customer.io.

Build Product and Customer Knowledge

- **Onboarding:** Completing any existing onboarding processes to better understand the experience of current self-serve customers.

- **Product Immersion**: Engage directly with the product in a sandbox environment to understand its core capabilities and user experience.

- **Documentation review:** Conduct an audit of existing educational materials to identify knowledge gaps and areas of opportunity. Pay close attention to the developer vs self-serve user experience.

- **Stakeholder Interviews**: Conduct discussions with internal teams such as Product, Customer Success, Sales, and Support to gather diverse perspectives on customer challenges and common inquiries. This will help identify areas where education can have the most impact.

- **Customer Feedback Analysis**: Review existing self-serve customer feedback, support tickets, and any existing survey results to understand recurring issues and information gaps. This data-driven approach will inform what educational content gets prioritized.

Manage and Build the Team

- **Conduct weekly 1-1s:** Get to know the team and understand their strengths, career goals, their ideas for improvements, and any roadblocks they may currently face in their day-to-day.

- **Brainstorm in weekly team meetings:** Work to build an environment of safety and trust where people feel comfortable sharing all ideas in brainstorm sessions and team meetings.

- **Set goals:** Work together with the team to establish quarterly goals that help drive the broader objective of increasing retention of self-serve customers.

- **Define necessary skillsets:** When looking at the potential future growth of the team, are there skillsets required that aren't covered by the current team members? Are they necessary for the first 6 months to a year in order to see impact?

Determine Necessary Resources

- **Evaluate current tech stack:** Assess the current authoring tools, LMS, and data analytics capabilities.

  - Do the current tools allow for scalability and growth?

  - What is the current self-serve customer experience with the current tech stack and how it's deployed?

  - How is the team currently reporting on usage?

- **Plan for upkeep, support, and operations** of all content and products that the team produces:

  - Upkeep: Existing and new content will likely need to be updated regularly, given the pace of product changes at a fast-moving software company.

  - Support: Depending on how we decide to support the program (for example, the launch of an Academy), who will be responsible for supporting it - users' questions, stakeholder questions, troubleshooting?

  - Operations: Consider a plan for improving processes, operations, and infrastructure to improve scalability over time. Does the current docs tool allow for this scalability and if not, decide as a team if a migration is

necessary to improve future efficiency, depending on budget allocation for tools.

- **Continue work with Brand team**: Continue working with the brand department to leverage their expertise and resources in content creation and distribution.

Measure Impact

- **User engagement metrics:** Establish KPIs such as content consumption rates, time spent on key pages, and if any course content has been released, completion rates.

- **Activation and retention metrics:** Partner with data teams to track self-serve customer retention rates post-content update release. Get a baseline metric for self-serve customer churn. After improvements have been made to the onboarding process for self-serve customers, see if after 6 months, that has translated to improved retention metrics.

- **Support ticket analysis:** Get an initial baseline on support ticket volumes from self-serve customers (if this breakdown is possible and if self-serve customers are offered support). Monitor for a reduction of support ticket volumes (6 months after any major changes to content) related to frequent onboarding issues, signalling the effectiveness of education content.