Trainn.

A Guide to Automations in Customer Education

Peer into the mind of Eric Mistry

Save hours of manual and repetitive work

Customer Educated

Index

Customer Educated

From Episode 5 with Eric Mistry

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Introduction

> Customer education is frequently viewed as a cost center, making investment challenging. However, leveraging automation can shift this perspective. Similar to investing in a robust CRM, investing in automation tools empowers customer education teams to gather crucial data, helping them defend their activities and showcase their value. Automations enhance customer education effectiveness.
>
> **Eric Mistry**
>
> **Strategy & Shared Services Operations | Contentsquare**

What are automations?

Automations help **turn repeated processes** or manual work into processes that run automatically or with minimal inputs. It **saves time while enhancing customer experience** and consistency. Some examples include sending automated reminder emails, piping emails between systems, and simplifying daily workflow without actively doing these functions.

How can Customer Education teams benefit from Automations?

1. **Eliminates repetitive and manual work:**

   Teams often find it difficult to get customer information in & out of CRMs, customize training content, send out scheduled content, track work, and communicate new updates, all of these can be automated so that you don't need to get into the manual work of doing them every time.

2. **Data-driven decisions in customer education**

   Automations can help pull out data that even your LMS might not capture. For instance, Eric **created an automation that can track when customers complete 2/3rd of a course** and their subsequent product actions. This granular data, previously unavailable, enhanced Heap's course content effectiveness.

3. **Breaks the "siloed nature" of customer education**

   Automations help **integrate data** from various sources, such as your LMS, CRM, and project management software. These integrations allow systems to talk and departments to communicate with each other, leading to better data clarity.

4. **Offer education across customer journey**

   Having a clear map of your customer's journey and their touch points/struggles **allows you to automate educational content** delivery making sure customers are assisted whenever they need help.

How to start building automations?

Building automations has become much easier over the years with the introduction of no-code tools like **Zapier**. Now anyone can build these systems with a basic understanding of a few principles such as:

1. **Mapping out your processes**

   Mapping is a process of understanding the individual events that make up bigger processes. Once you map out your processes and identify all the bottlenecks where manual labor is involved- map out the automations that can help eliminate these bottlenecks. A beneficial exercise includes mapping out the entire customer journey from the time prospects sign up for your product, this allows you to understand all the customer touchpoints where education is required.

2. **Identify the ideal source of truth**

   Your CRM/ data warehouse should be your ideal source of truth, that you can trust. While creating automations you can utilize Google Sheets to combine data from multiple sources of truth, to create a one-use sheet that you can revisit at all times for analysis.

3. Set up automation software

Automation software is a no-code tool that allows you to build automations without the help of your developers. Eric recommends Zapier because it is easy to use and has a robust ecosystem to help you achieve success while using the software.

4. Build and review

It is crucial to reflect on your automations. In the initial stages of automation development, it is common to include more steps than necessary. As you gain expertise in this area, all processes will become more streamlined.

Four Powerful Automations

Examples of how teams can use automations in Customer Education

Automated Instructor-led Training Scheduling

1

In Part 2 of the episode, Eric Mistry explains how the Director of Customer Education at Heap and the trainers spent countless hours manually setting up the scheduling of instructor-led training sessions. With automations, he saved 15-20 hours of director and trainer time.

How ILT sessions were scheduled at Heap (Before Automations)

1. Customer/CSM reaches out to the Director of customer education to schedule a paid training session.

2. The director/VP proposes possible times based on instructor availability.

3. The customer confirms the time, and the director assigns an instructor, creating a training request in the CRM.

4. The assigned trainer begins their email sequence to the customer: This involves the manual creation of emails, calendar invites, and reminders for each training session.

5. Customer training happens: This step requires manual tracking of attendance and follow-up communication after the training.

6. Assigned trainer updates the training request item in the CRM with attendees and closes it: This involved manual data entry and tracking of training completion.

Problem with this approach

The Director of customer education, and trainers spend time on manual and repetitive work for every ILT session booked.

Eric's Solution

Listen to this portion of the podcast (From 29:00)

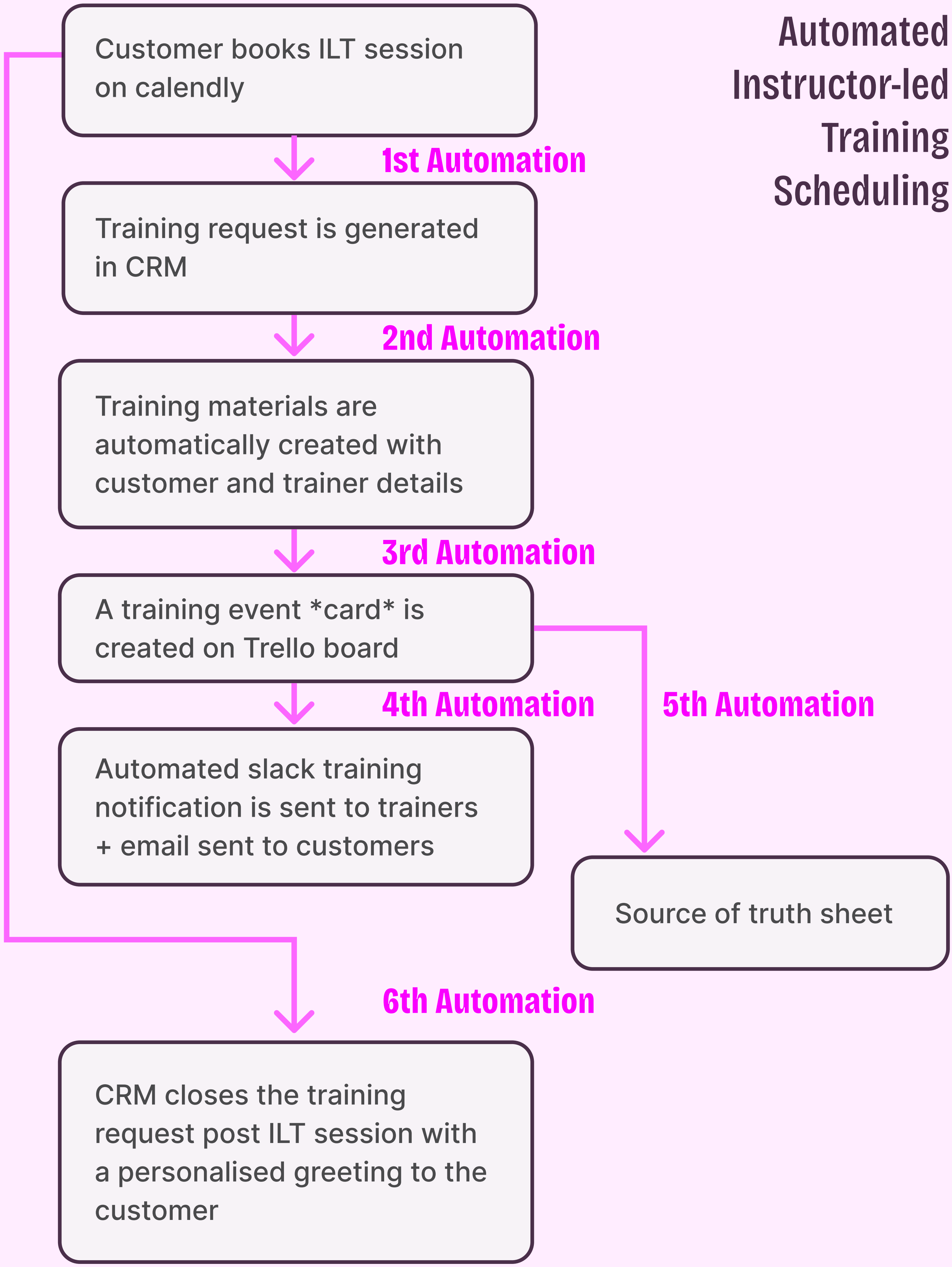
Eric introduced automations using Zaiper that made different tools to talk to each other- Calendly, CRM, Google Sheets, Slack, and Trello to streamline the process and reduce manual effort.

1. The customer/CSM visits a calendly site that has the training types and selects a date and time: Calendly automatically assigns a trainer based on availability and creates a calendar event. The site assigns trainers through a round-robin process to balance the workload.

Once the calendly sign-up is created, the automations start firing up:

1. **1st Automation:**
   A training request is created in the CRM based on calendly signup data and the customers account with the company

Automated Instructor-led Training Scheduling



2. **2nd Automation:**
   Customer training materials (Docs, courses) are automatically created via templates, with the customer's and trainer's names inserted programmatically.

3. **3rd Automation:**
   An automatic training event card is generated in the Trello board with details such as the training type, trainer, date of training, company, zoom link, calendar event, etc) ***

   ****Each day, Trello checks the due date on a card and moves it into the correct column. (Columns are scheduled, 5 days out, 3 days out, 1 day out, today, and completed). When a card moves into a column, a new email is sent based on the training type.*

4. **4th Automation:**
   Once the Trello card is created an automated Slack notification is sent to the training team to confirm that each of the above steps has fired appropriately and if any manual changes need to be made. An automated email sequence is also sent to customers with all training details.

5. **5th Automation:**
   All of the above data is then piped to a "Source of Truth" spreadsheet for easy data wrangling and confirmation.

6. **6th Automation:**
   After the training is completed on the calendar, an automation fire that closes the CRM training request and sends the attendees a personal message - " Thanks for attending, we'd love your feedback"

Result:

1. Eric's automation saved **15-20 hours of Director of Customer Education**'s time per week that used to be spent on doing manual booking of ILT sessions.

2. The trainers were able to squeeze in **two to three more trainings in a week** because they were spending time conducting sessions and not scheduling them.

3. The creation of a **source of truth** sheet allows customer education teams to keep track of all the details of each ILT session conducted, without having to manually go through multiple sheets every time.

2

Slack automated bot to answer internal support tickets

Eric set up a Slack channel named - '***Talktocustomereducation'*** as an internal support channel, to answer mission-critical questions of CSMs whenever they had any doubts regarding customer education processes.

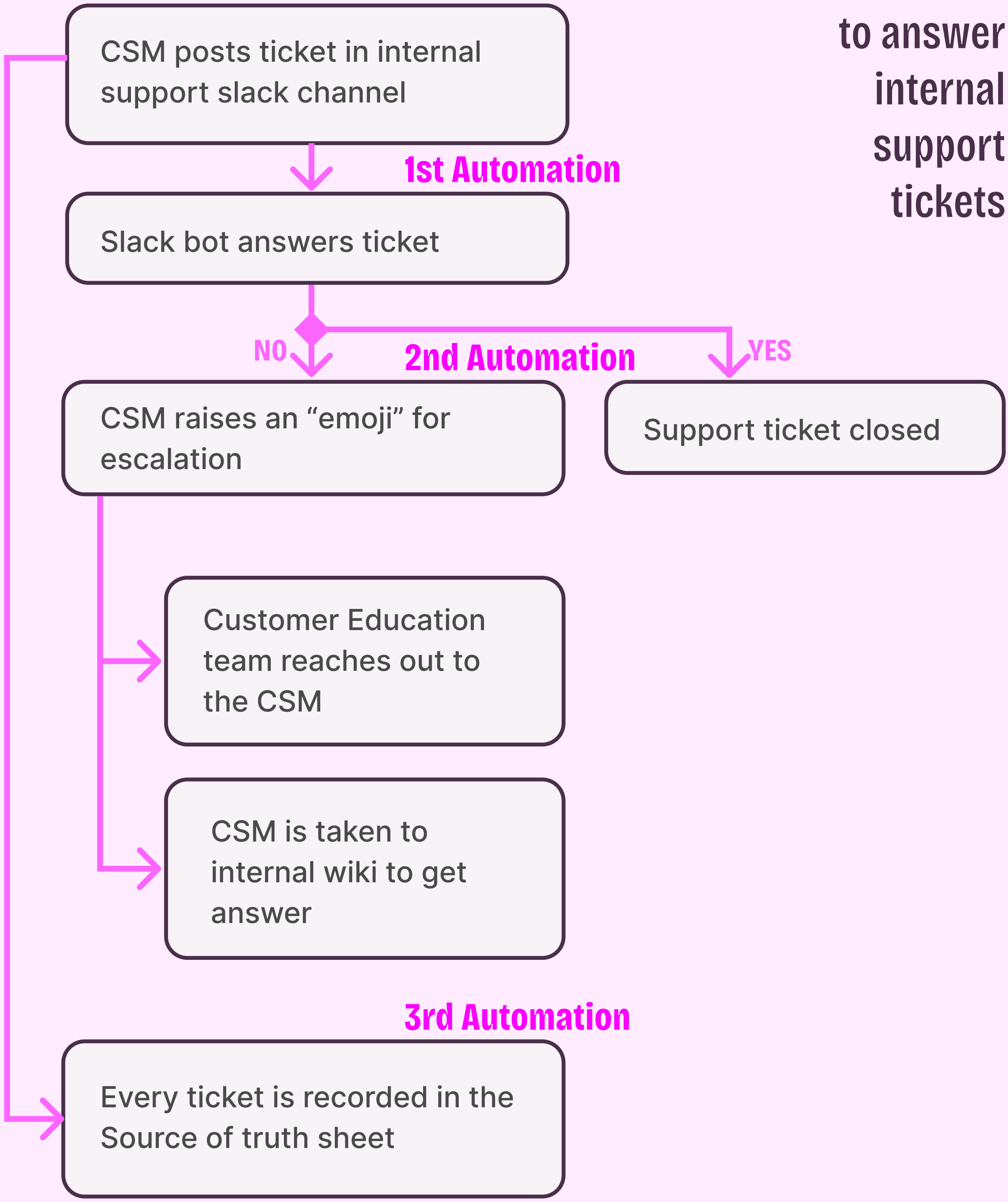
1. **1st Automation:**
   Eric created an automated Slack bot that answers frequently asked questions from the CSM such as how to schedule training, what types of training are available, and how to find a trainer's availability.

2. **2nd Automation:**
   Eric set up an emoji reaction for escalation. Whenever a CSM doesn't find the right answer, the CSM can react with an emoji and it immediately flags the question to Eric's team to further review the response

3. **3rd Automation:**
   All support tickets are sent into a Google sheet as a "source of truth" for Eric to run sentiment analysis later on

   Listen to this portion of the podcast (From 2:08)

Slack automated bot to answer internal support tickets



3 Automated Custom Educational Resource Emails for Sales

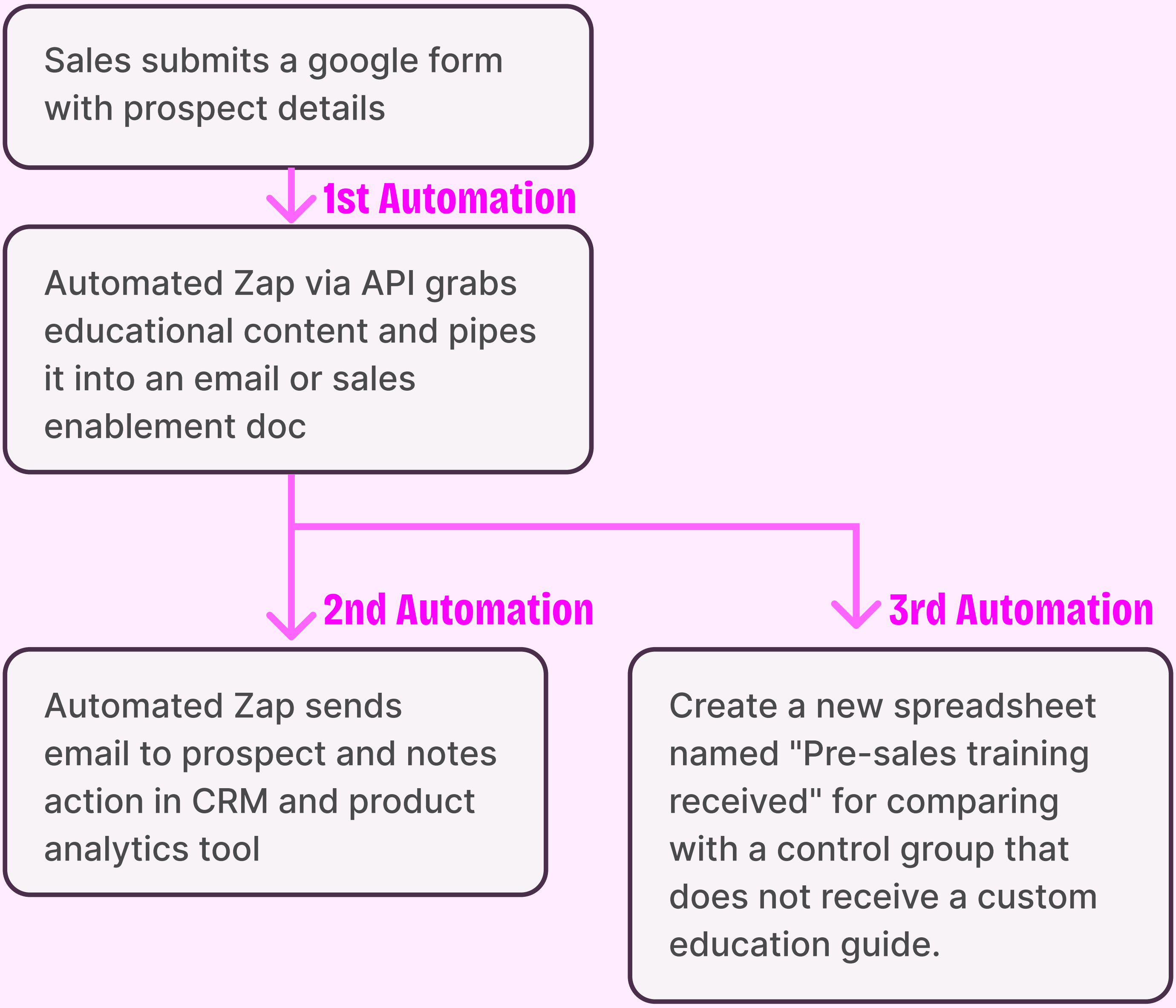
Problem with this approach

Every time a prospect signs up with the product the sales team manually sends out personalized emails with custom educational resources to nurture the prospect. This method not only consumed time but also **lacked data to substantiate which educational content effectively converted prospects into paying customers**.

Solution

Implement an automation using Zapier that triggers the delivery of custom educational content—such as blogs and sales enablement materials—directly to the customer's inbox. This automation customizes each document with the customer's name, company name, and logo, ensuring a tailored experience.

Automated Custom Educational Resource Emails for Sales



Result

This automation eliminates the need to send an email manually, freeing up valuable time. Moreover, it **allows for a comparative analysis between prospects who received training materials and those who did not.** The resulting data provides actionable insights, enabling sales teams to close deals more effectively and customer education teams to initiate training pre-handoff from sales.

Listen to this portion of the podcast - (From 25:31)

Course Completion Automation

4

Problem with this approach

Eric's LMS tracks only Course Completion, which made it difficult to analyze whether attending or completing the course led to a behavior change among customers.

Solution

Eric used Zapier to automatically pipe in lesson completion data into his product analytics tool and Google Sheets.

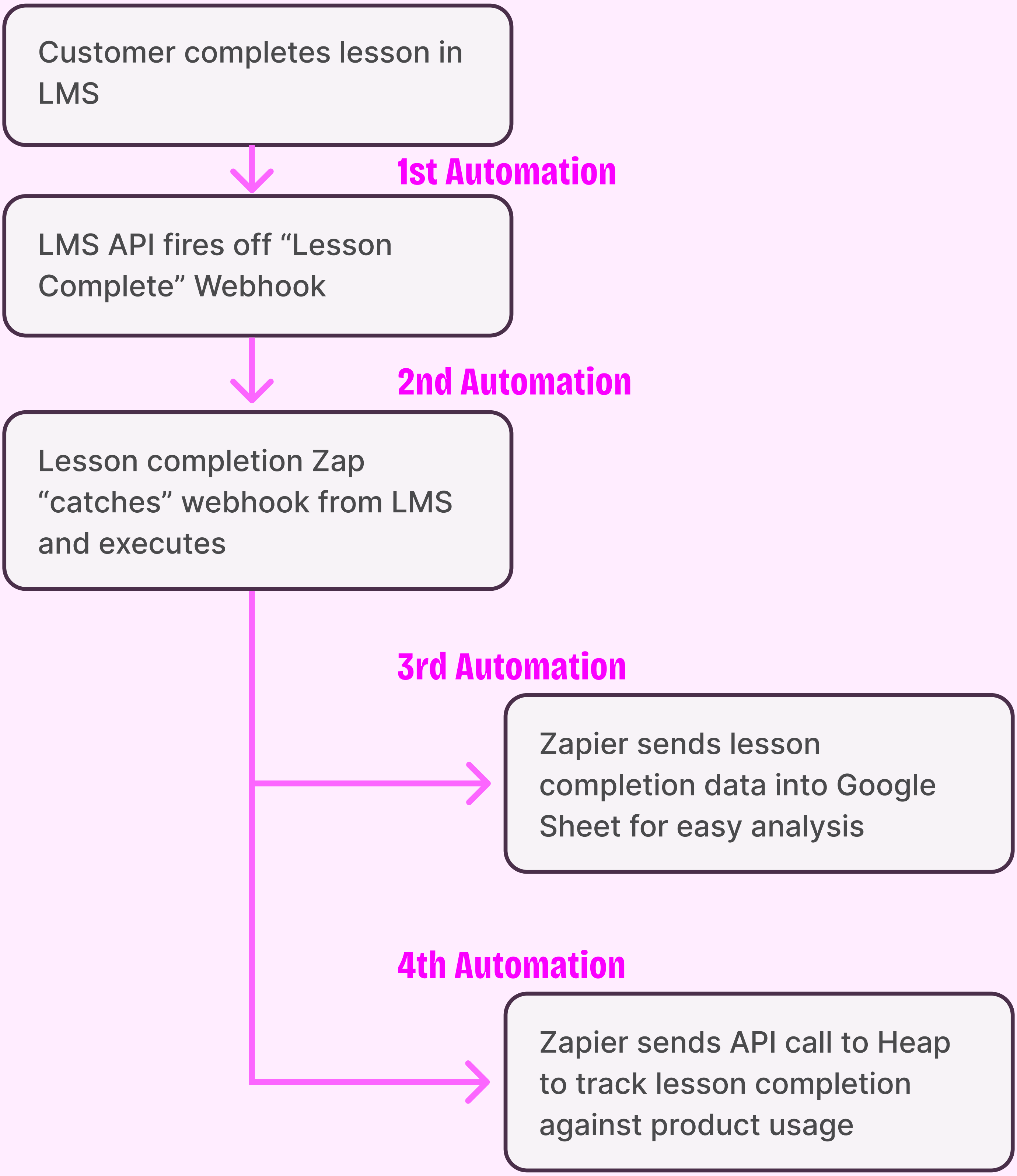
Result

With this automation, Eric can now **differentiate between a trained customer** (those who took the course) **and an untrained customer** (those who did not take the course). This offered better comparable data to study the impact of lesson completion on product use case behavior.

Tools for Building Automations

1. Zapier for building Automations.
2. Miro, Zapier, Canvas, Puzzles for Mapping.

Course Completion Automation



Resources:

Episode 5 of Customer Educated Podcast, Eric Mistry - LinkedIn Profile, No-code Operations Community, Zapier Academy

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