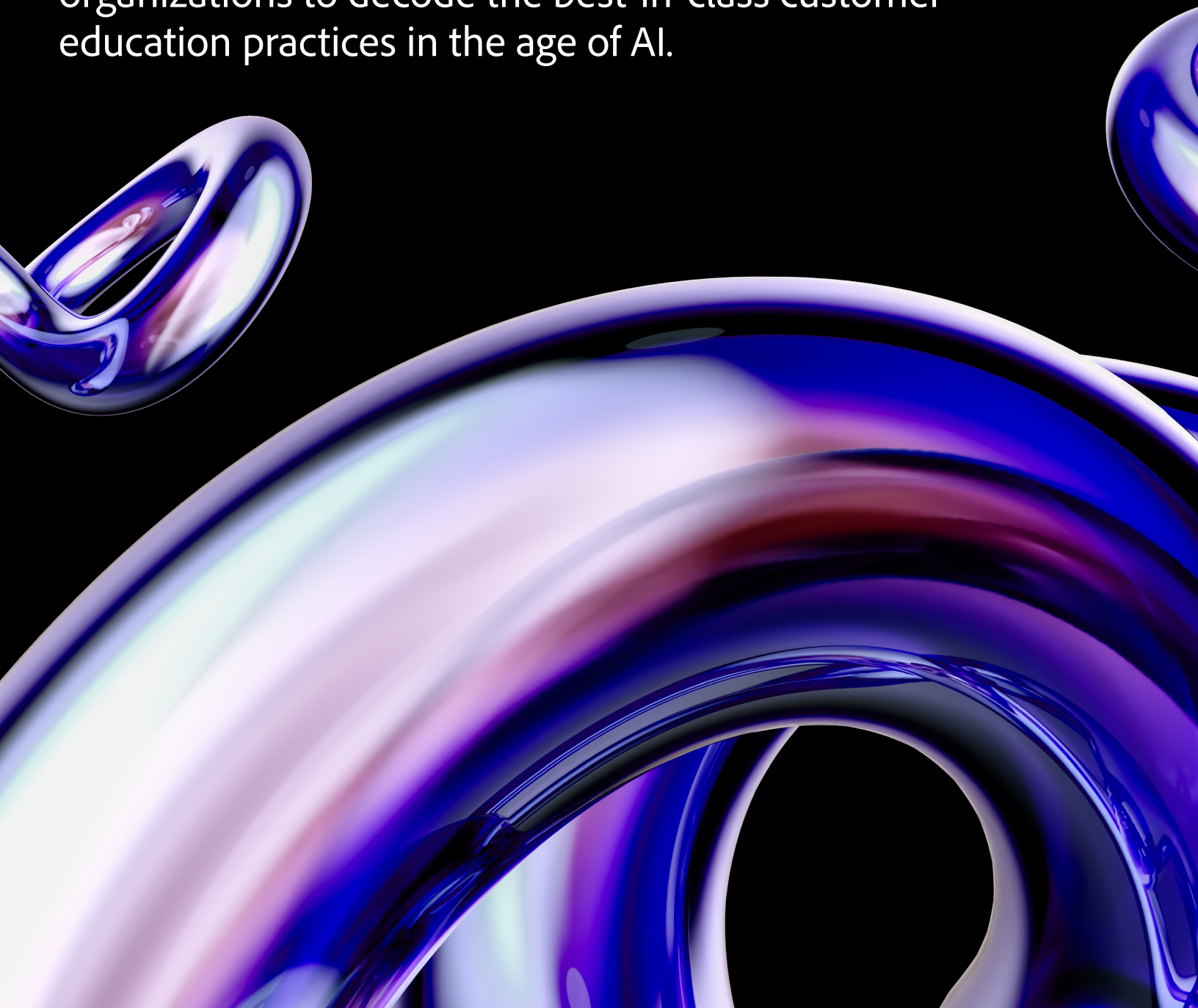




Customer Education Maturity Assessment (CEMA)

An Everest Group survey, supported by Adobe, of 150 organizations to decode the best-in-class customer education practices in the age of AI.



September 2026

Customer Education Maturity Assessment (CEMA)

Raising the Bar: Decoding Best-in-Class Customer Education Programs in the Age of AI

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Introduction

Customer experience is increasingly shaped by how quickly and consistently customers realize value from the products and services they buy. Alongside product experience, customer success, and support, customer education helps customers build the knowledge and skills needed to adopt products effectively, solve problems, and achieve desired outcomes. As a result, customer education is evolving from a training and support function into a strategic lever for customer experience and value realization. Effective programs reduce friction, accelerate adoption and time-to-value, enable self-service, and strengthen engagement.

AI and agentic AI are accelerating this shift by making learning more personalized, proactive, contextual, and embedded across the customer journey. Enterprises can deliver guidance when customers need it and connect education more closely with customer and business outcomes.

However, investment alone does not automatically translate into maturity. While 80% of enterprises set aside some budget for customer education, 39% still operate with shared ownership and no single primary owner.¹

This Viewpoint introduces the Customer Education Maturity Assessment (CEMA), a framework designed to decode the customer education programs of enterprises. The CEMA framework

assesses the dimensions that shape program performance: program design, technology intelligence, AI leverage, governance, activation, and impact. The report also identifies practices associated with best-in-class programs to help enterprises advance customer education across the customer journey.

Drawing on a survey of 150 organizations, this Viewpoint provides:

- An overview of the research methodology and respondent profile
- An introduction to the CEMA framework and the four customer education maturity stages
- An analysis of the capabilities that shape customer education programs and how they develop across the maturity stages
- Best practices and key takeaways for organizations
- A customer education maturity checklist for enterprises to reflect on where their programs stand and identify priority areas of action

Customer education, customer experience, marketing, support, and enterprise leaders involved in shaping customer journey can use this report to benchmark maturity, identify critical capability gaps, and prioritize the actions required to evolve customer education from a content-led support function into a scalable business lever.

¹ Everest Group Customer Education Maturity Assessment (CEMA) Survey, 2026; based on responses from 150 enterprises

Key research highlights



Toward AI-enabled learning orchestration

AI is beginning to connect content creation, discovery, personalization, activation, and intelligence into a closed learning loop. Learning will be generated and refreshed faster, surfaced through conversational access, adapted using customer context, delivered across relevant touchpoints, and continuously improved based on learner and business signals. Survey findings show that 40% of organizations have moved beyond AI experimentation into selected workflows or scaled adoption, while continuing to pilot other use cases.



Learning at the moment of need

Best-in-class organizations are extending customer education beyond the academy and embedding it across the product, customer portal, support journey, community, email, and customer-facing workflows. Survey findings show that 77% of enterprises surface learning across multiple touchpoints rather than relying only on ad hoc and informal channels. This allows education to appear when customers are trying to complete a task or resolve an issue. The shift improves relevance and increases the likelihood that learning translates into action.



Customer context for relevant learning

Role, goals, product use, lifecycle stage, account health, support history, and prior learning activity are increasingly shaping what customers see next. Customer education leaders are working with product, customer success, marketing, support, and other functional teams to connect these signals and coordinate learning and intervention. Already, 63% of organizations personalize education using multiple learner and context signals, pointing toward more coordinated learning around customer needs.



The academy as a capability-building hub

More mature enterprises bring structured courses, certifications, and product knowledge together within a central academy or content hub that serves as a single source of truth for customer learning. Among best-in-class organizations, 83% have a fully established academy, most offer at least one certification, and 58% offer certifications with market recognition. This supports clear role- and proficiency-based progression and makes education a core part of customer interfaces such as websites and portals.



Activation across customer touchpoints

Best-in-class organizations make learning visible across customer interactions rather than relying on the academy as the only point of access. Customer Success Managers (CSMs), campaigns, communities, and in-product touchpoints guide customers toward relevant learning, while recognition helps sustain participation. More than 50% of best-in-class organizations use in-product nudges to surface learning, while all recognize achievement through customer awards, communities, and events.

Customer Education Maturity Assessment (CEMA) framework

Customer education programs can demonstrate scale without demonstrating maturity. A large content library, an academy, or a dedicated platform may signal investment, but not whether learning is reaching the right customers, influencing behavior, or contributing to business value. Similarly, positive results achieved through high manual effort may be difficult to scale or sustain.

The CEMA framework assesses customer education maturity across two axes: impact and capability maturity. Together, these axes show how effectively customer education operates today and how prepared it is to scale and evolve in an AI-enabled environment.

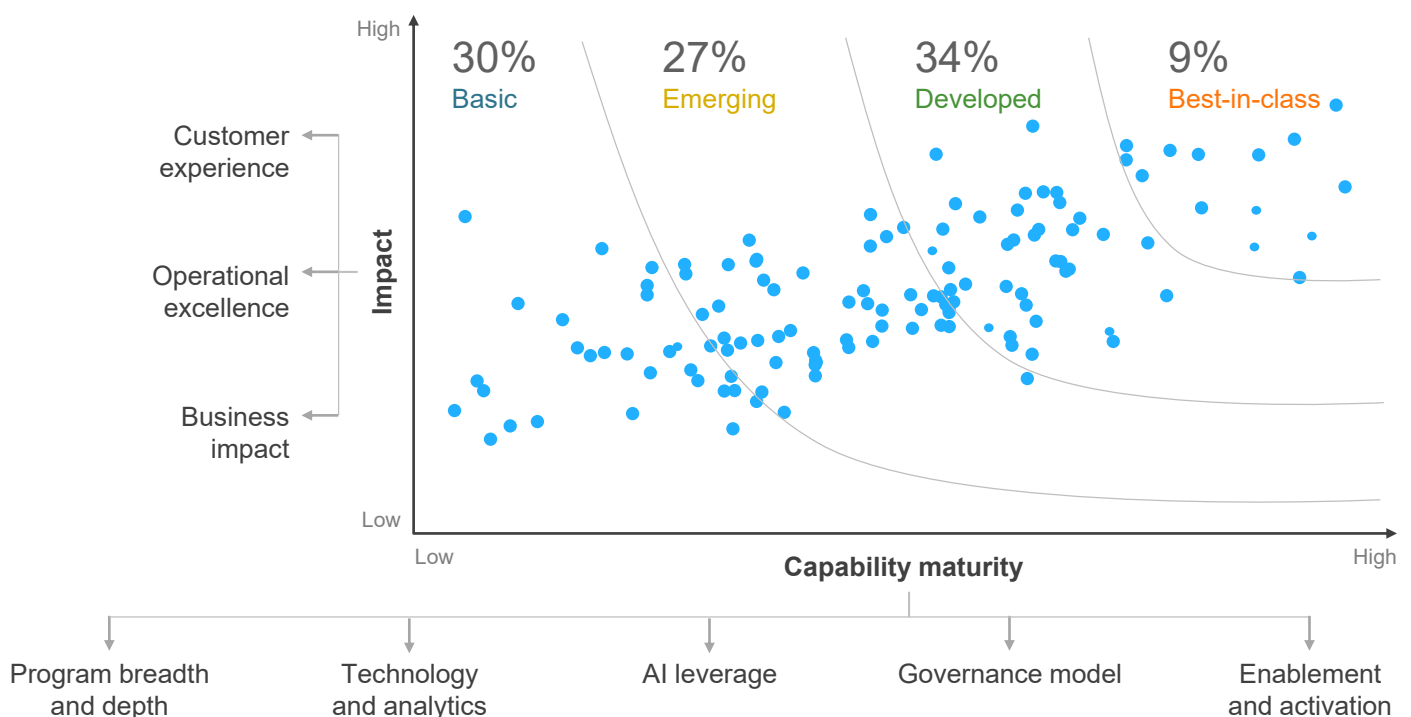
Impact reflects the value created across customer experience, operational excellence, and business outcomes. Capability maturity reflects the foundations that allow customer education to scale, adapt, and consistently support customer value. It covers program breadth and depth, technology and analytics, AI leverage, governance, and enablement and activation.

Exhibit 1 maps the CEMA framework across the impact and capability maturity axes to illustrate how enterprise customer education maturity evolves.

Exhibit 1: The CEMA framework and enterprise maturity map

Source: Everest Group (2026)

● Each dot on the matrix positions an organization's customer education program maturity



What the enterprise maturity map reveals

Everest Group's assessment of 150 enterprises using CEMA reveals that customer education maturity develops progressively rather than through a single transformation. Enterprises typically advance through four distinct stages, each reflecting greater structure, scale, integration, and visibility into customer outcomes:

- **Basic:** fragmented, reactive customer education programs with limited structure, reach, and visibility into outcomes
- **Emerging:** more structured programs with expanding reach and early visibility into customer outcomes
- **Developed:** scalable, journey-aligned customer education programs with stronger adoption and consistent outcome measurement
- **Best-in-class:** future-ready customer education programs combining role-based pathways, AI-enabled scale, integrated delivery, and outcome intelligence to drive customer value

These stages translate into distinct maturity patterns across the CEMA dimensions. As highlighted in Exhibit 2, enterprise maturity progresses as customer education becomes more structured, scalable, integrated, and outcome-oriented. The sections that follow examine each dimension in greater detail, including how maturity progresses across the four stages, where the market stands today, the key challenges holding organizations back, and the practices that define best-in-class performance.

“We have worked on providing education at different stages of the customer journey rather than treating training as a one-time activity. Customers can access information during product selection, implementation, and ongoing use.”

– Manager, Customer Support, a UK-based industrial manufacturing company

Exhibit 2: Enterprise maturity across CEMA dimensions

Source: Everest Group (2026)

	Basic	Emerging	Developed	Best-in-class
Impact Measures the customer, operational, and business value created by customer education	Reports participation and select outcomes, with weak or inconsistent link to customer and business value	Demonstrates clearer customer experience and select operational benefits, but business link remains narrow	Shows consistent customer and operational impact, with emerging evidence of retention, expansion, and revenue influence	Establishes repeatable link between customer education and customer experience, operational efficiency, retention, growth, and new business outcomes
Program breadth and depth Covers audience and lifecycle reach, learning depth, academies, certifications, content governance, and learner support	Provides foundational, product-led content for onboarding and support, with limited audience or lifecycle differentiation	Introduces structured curricula and learning paths for core audiences, but advanced and role-specific coverage remains limited	Scales education across more audiences and lifecycle stages through academies, certifications, and stronger content governance	Embeds role-based learning across the life cycle, supported by defined pathways, certifications, and continuous improvement
Technology and analytics Reflects platform maturity, system integration, and analytics depth	Relies on basic delivery tools and activity reporting, with customer education largely operating as a standalone destination	Adopts learning platforms and improves participation tracking, but integration and journey visibility remain selective	Scales platforms across multiple programs, connects selected business systems, and expands into structured analytics and multi-channel discovery	Orchestrates education through an integrated ecosystem that uses customer context to trigger, personalize, and measure learning in workflow
AI leverage Assesses the use of AI across content, learner experiences, administration, personalization, and in-workflow delivery	Uses AI for isolated tasks, such as content creation or basic search, with limited customer context	Applies AI across selected learner-facing use cases, but deeper automation, personalization, and conversational access remain limited	Extends AI into learner and content workflows, adds product and lifecycle context, and begins enabling conversational access across touchpoints	Scales AI across learners, administrators, and customer-facing teams, combining richer customer context with conversational, in-flow delivery
Governance Defines ownership, decision rights, investment, accountability, and cross-functional oversight	Operates through fragmented ownership, informal coordination, and limited dedicated funding or resources	Introduces shared governance and a primary owner, but decision-making and execution remain distributed across functions	Consolidates ownership within a dedicated function, supported by cross-functional governance, clearer decision rights, and scaled resources	Runs through an executive-backed governance model with end-to-end accountability, dedicated investment, formal reviews, and KPI-led decision-making
Enablement and activation Captures how learning is promoted, embedded across channels, reinforced through recognition, and activated by customer-facing teams	Depends on manual promotion and isolated channels, with limited recognition or sustained learner engagement	Expands promotion through portals, events, campaigns, and customer-facing teams, while formalizing basic recognition	Coordinates activation across product, customer success, community, and partner channels to reinforce continued participation	Embeds contextual learning across customer workflows and lifecycle moments, using ecosystem activation and status-based recognition to sustain engagement

Impact

Customer education maturity is incomplete without evidence of the impact a program creates, regardless of how advanced its capabilities may be. The impact parameter therefore assesses how consistently customer education is linked to outcomes across three areas: customer experience, operational excellence, and strategic business impact.

Impact maturity progresses from limited evidence of onboarding and productivity gains to broader and more consistent linkage with product adoption, retention, revenue expansion, and new business influence.

Exhibit 3 shows the characteristics that differentiate the four maturity stages in the impact created by customer education.

Exhibit 3: Maturity progression in impact

Source: Everest Group (2026)

Impact	Basic	Emerging	Developed	Best-in-class
Customer experience (Shows how strongly customer education links to customer-facing outcomes, including onboarding completion, time to first value, product / feature adoption, and customer engagement)	Tracks selected customer KPIs, but education's impact is inconsistent. Programs reach some customers, yet high-impact outcomes remain limited	Measures key experience outcomes to demonstrate link to onboarding and time-to-value. Impact on product adoption and engagement is less consistent	Maintains near-comprehensive KPI tracking; links education to onboarding, time-to-value, and product adoption, although its impact on engagement is not yet as strong	Tracks the full set of core customer experience KPIs and consistently links customer education to customer value. High impact is evident across nearly all outcomes, including product adoption and engagement
Operational excellence (Reveals how customer education improves internal team productivity, customer support and success team efficiency, and support ticket reduction)	Tracks operational KPIs, but demonstrates limited impact on team productivity, support efficiency, and ticket reduction	Measures the core operational KPIs and demonstrates clearer impact on team productivity and support efficiency; ticket reduction is less developed	Demonstrates measurable impact across key operational outcomes such as ticket reduction, support efficiency, and team productivity, but impact may vary across areas	Demonstrates sustained and consistent impact across the full operational KPI set, with customer education improving productivity, support efficiency, and ticket deflection at scale
Business impact (Defines how customer education connects to strategic business outcomes, improving retention, renewal, revenue expansion, customer satisfaction / loyalty, and new business influence)	Shows weak business impact beyond satisfaction, particularly across revenue expansion and new business influence	Links customer education strongly to satisfaction and retention. Impact is concentrated in relationship outcomes rather than growth outcomes.	Measures a broader set of business outcomes and demonstrates strong impact on satisfaction and retention, with credible link to revenue expansion. New business influence remains comparatively weak	Tracks all the strategic KPIs and demonstrates broad impact across satisfaction, retention, revenue expansion, and new business influence

Where the market stands

Several trends are shaping customer education impact measurement across KPI tracking, attribution depth, and linkage to customer and business outcomes.

Enterprises widely track impact, but attribution to customer education remains uneven

More than 80% of enterprises track customer experience, operational excellence, and strategic business outcomes. The link to customer education is most established for customer satisfaction and value realization, while best-in-class programs go further by examining their contribution to product adoption, retention, revenue expansion, and new-business influence. The maturity distinction therefore depends on measurement depth and the range of outcomes considered, rather than on whether an enterprise tracks impact.

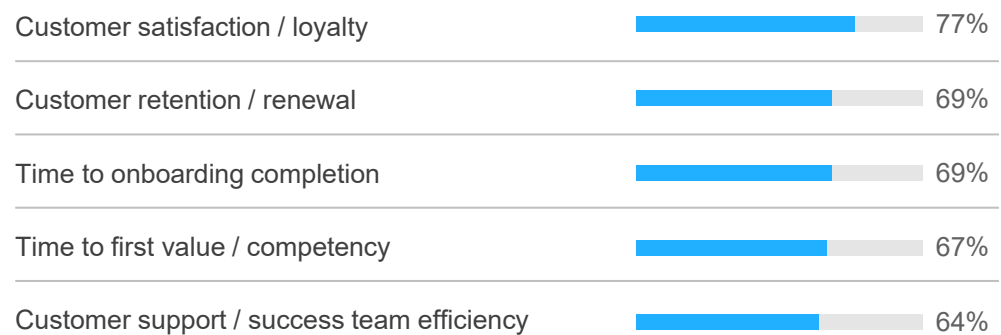
As highlighted in Exhibit 4, the extent to which enterprises attribute business outcomes to customer education varies considerably across KPIs, with stronger attribution for some customer and operational outcomes than for others.

Exhibit 4: Level of customer education impact attributed to enterprise KPIs

Source: Everest Group (2026)

XX% of organizations attributing high or significant KPI impact to customer education (ratings of 4 or 5; n=150)

Top 5 KPIs with the **strongest attributed impact**



Bottom 2 KPIs with the **weakest attributed impact**



Key challenges

Enterprises face five recurring challenges in linking education activity to business outcomes.

- **Impact is difficult to isolate:** Even if correlation of outcomes with customer education is established, proving causation remains difficult because improvements may also reflect overlapping influences such as product upgrades, marketing activity, and account maturity. This makes it harder to build a compelling business case or demonstrate RoI for customer education investment, a challenge cited by 36% of enterprises
- **Time lag for attribution to impact:** Customer education impact on onboarding and feature adoption can be observed sooner through metrics such as time to first value, onboarding completion, and product use. Retention, expansion, and long-term revenue outcomes often appear months later, making it harder to connect training completion to renewal or expansion
- **Data silos and fragmented systems:** Learning, product, CRM, and revenue data often reside in separate systems. Even when customer education data shows engagement, linking it to product adoption or revenue remains inconsistent and manual because those data sources reside elsewhere
- **Dependence of impact on field execution:** Customer education attribution weakens when sales teams do not know the academy content, do not assign education paths, or do not use learning data in customer conversations. Sometimes, sales teams may not consistently tag whether education influenced deals
- **Learner data does not map cleanly to account outcomes:** Customer education data is often captured at the individual customer user level, while business outcomes such as renewal, expansion, and Annual Recurring Revenue (ARR) are measured at the account level, causing inconsistent IDs and seat-level mapping issues, making it harder to prove business influence

Voices from leaders

“It is sometimes difficult to separate the impact of education from other customer success activities.”

- SVP, Customer Success, a UK-based financial services company

“Different teams own different parts of the customer journey, so bringing the data together can be challenging.”

- Head of Customer Experience, a US-based retail and e-commerce company

“Education initiatives can be hard to prove in terms of short-term impact, as value often emerges over longer engagement cycles.”

- Director, Marketing, a US-based technology software company

“We are improving identity resolution across systems to consistently track learner journeys.”

- VP, Customer Support, a US-based electronics and semiconductors company

Best practices

Challenges in linking customer education to outcomes can be addressed by adopting the following best practices.

- **Standardize attribution language and account-level signals:** Define key attribution events, such as a trained or certified account (for example, an account where a defined share of users complete training or certification). Then, roll up learner activity into these account-level signals to link education with business outcomes measured at the account level
- **Create an integrated customer education data layer:** Connect learning data with product use, lifecycle stage, account health, customer success data, and adoption-gap signals through an integrated architecture, vendor suite, or Model Context Protocol (MCP)-enabled connection
- **Measure movement across business-relevant KPIs:** Move beyond completion and onboarding metrics to track impact on time-to-value, product/feature adoption, ticket deflection, customer engagement, and expansion
- **Activate insights within sales workflows:** Make customer education data action-ready for sales teams by surfacing learning progress in Quarterly Business Reviews (QBRs), account reviews, and renewals, with quick links by use case, product gap, lifecycle moment, or opportunity
- **Build the leadership proof story:** Run trained versus untrained cohort analysis comparing product use, account health, retention risk, ARR retained / at risk, training status, and certification status to show where education correlates with healthier accounts and protectable revenue

Program breadth and depth

Program breadth and depth measure both the reach and the rigor of a customer education program. It assesses how comprehensively the program serves different learner groups and customer lifecycle stages, the depth of its learning experiences, the maturity of its academies and certifications, the discipline of its content governance, and the support mechanisms that reinforce learning beyond course completion. Maturity progresses from fragmented, largely foundational content to structured, role-based pathways that support customers from onboarding through advanced proficiency and recognized expertise.

Exhibit 5 shows how program breadth and depth differ across the four maturity stages.

Exhibit 5: Maturity progression in program breadth and depth

Source: Everest Group (2026)

Program breadth and depth	Basic	Emerging	Developed	Best-in-class
Audience coverage Examines the breadth of learner groups served through customer education	Primarily serves new and existing customers through broadly applicable product content	Extends coverage to selected partners, internal teams, executives, or administrators, while specialist role coverage remains uneven	Offers differentiated learning for customers, partners, internal teams, and priority user roles, with growing multilingual reach	Provides role- and need-specific journeys across the full customer and partner ecosystem, supported by broad multilingual coverage
Lifecycle coverage Outlines how education supports different stages of the customer journey	Concentrates education around onboarding, product training, and issue resolution	Extends education across ongoing adoption and self-service, while coverage of pre-sales, advanced product use, renewal, and expansion remains selective	Supports most lifecycle stages, including awareness, pre-sales, advanced product use, and expansion	Embeds education across the full life cycle through coordinated journeys, triggers, and progression pathways
Content formats and depth Explores the range of learning experiences used to build knowledge and proficiency	Relies mainly on documentation, videos, webinars, and basic self-paced courses that explain core features and common tasks but offers limited progression	Introduces role-based and intermediate content for selected audiences or use cases	Provides structured progression from foundational knowledge to advanced application and proficiency; starts focusing on content relevance with role-based pathways and applied learning opportunities	Aligns learning content with roles, tasks, use cases, and demonstrated levels of competence. Uses blended, embedded, social, and experiential formats based on the required customer behavior
Academy and certification Evaluates the structure and credibility of formal learning and validation	No formal academy exists, or learning is organized through a basic resource hub.	Structured curricula or content repository exist with basic certificates, but pathways and recognition remain limited	Offers a governed academy with defined learning paths, assessments, and formal certifications	Offers role-based academies and rigorous certifications with credible, market-visible pathways to expertise
Content quality and refresh Assesses how customer education content is reviewed, updated, and governed	Reviews content reactively, with updates driven mainly by product releases and immediate requirements	Conducts periodic reviews with content owners, but standards and response times vary	Uses more structured governance to align updates with product changes, learner feedback, and insights into product use	Maintains an ongoing refresh cadence supported by cross-functional governance and faster, signal-led updates, while applying SEO/AEO principles to improve content discoverability

Exhibit 5: Maturity progression in program breadth and depth (continued)

Source: Everest Group (2026)

Program breadth and depth	Basic	Emerging	Developed	Best-in-class
Support and feedback Considers the support available to learners and use of feedback to improve the program	Support relies on documentation and email, while feedback is collected inconsistently	Expands support through CSM, chat, communities, or platform support, and more structured feedback collection	Strengthens support across multiple channels and increasingly uses feedback to improve content and learning experiences	Integrates digital and human support while using structured feedback loops to improve content, platform, and roadmap decisions
Content monetization Outlines how customer education is positioned as a free, premium, or revenue-generating offering	Offers customer education mainly as a free capability supporting onboarding, adoption, and customer success	Introduces paid certifications and selected premium offerings while keeping core education accessible	Monetizes selected advanced offerings, such as certifications, workshops, subscriptions, and specialized or enterprise training	Structures the learning portfolio around a deliberate free-to-paid model, keeping foundational education broadly accessible while monetizing advanced specialization, formal skill validation, and high-touch experiences

Where the market stands

Several trends are shaping customer education across audience reach, lifecycle coverage, platform maturity, content discovery, and AI adoption.

Audience coverage is broadening, but specialist roles remain underserved

Customer education has near-universal reach among core audiences, covering 99% of existing customers and 95% of new customers. Reach is also expanding, with 83% of enterprises educating internal customer-facing teams and 64% extending programs to partners and resellers. Specialist coverage remains more selective, declining from 57% for executives and business users to 50% for power users and administrators and just 31% for technical users and developers.

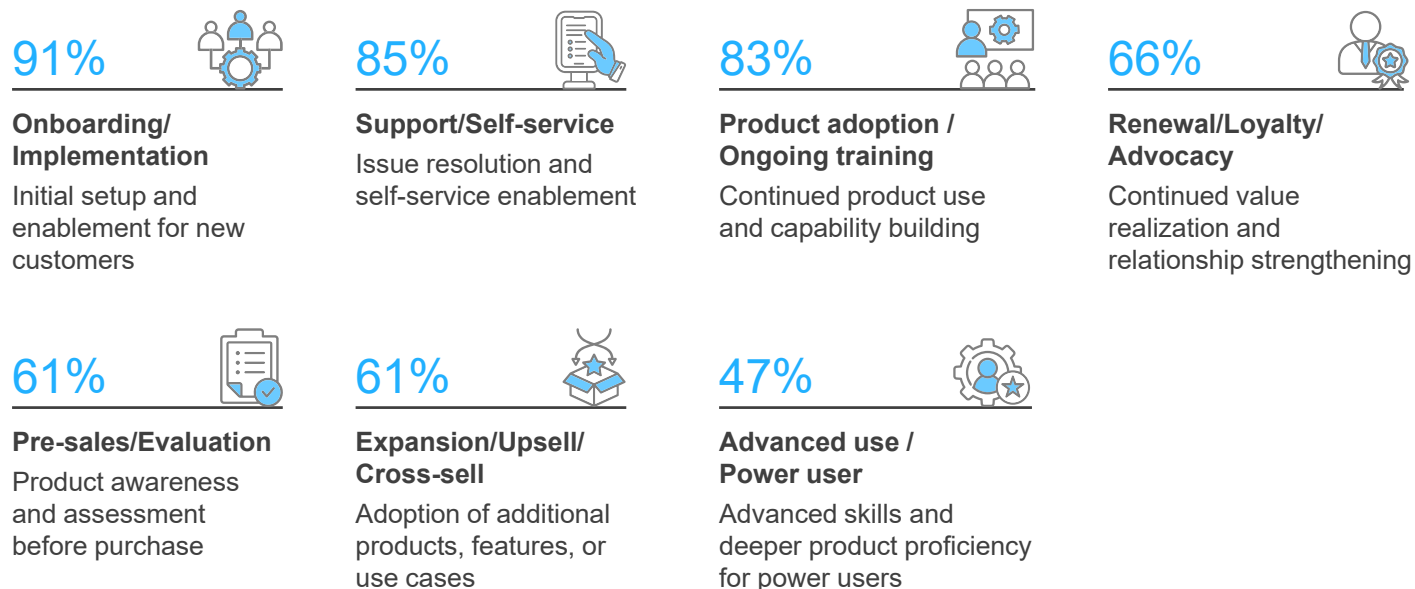
Customer education remains concentrated around onboarding, adoption, and support

Across the customer life cycle, as customers move from product evaluation through onboarding, adoption, support, and expansion, education is most concentrated around onboarding (91%), support and self-service (85%), and ongoing product adoption (83%). Coverage is comparatively lower for advanced use (47%), while pre-sales and expansion are supported by 61% of enterprises each. The next maturity shift is therefore toward extending education beyond foundational adoption to support deeper proficiency and a broader set of customer lifecycle moments.

Exhibit 6 highlights how customer education remains concentrated around onboarding, support and self-service, and product adoption, with comparatively limited coverage for advanced use.

Exhibit 6: Customer life cycle coverage by education programs

Source: Everest Group (2026)



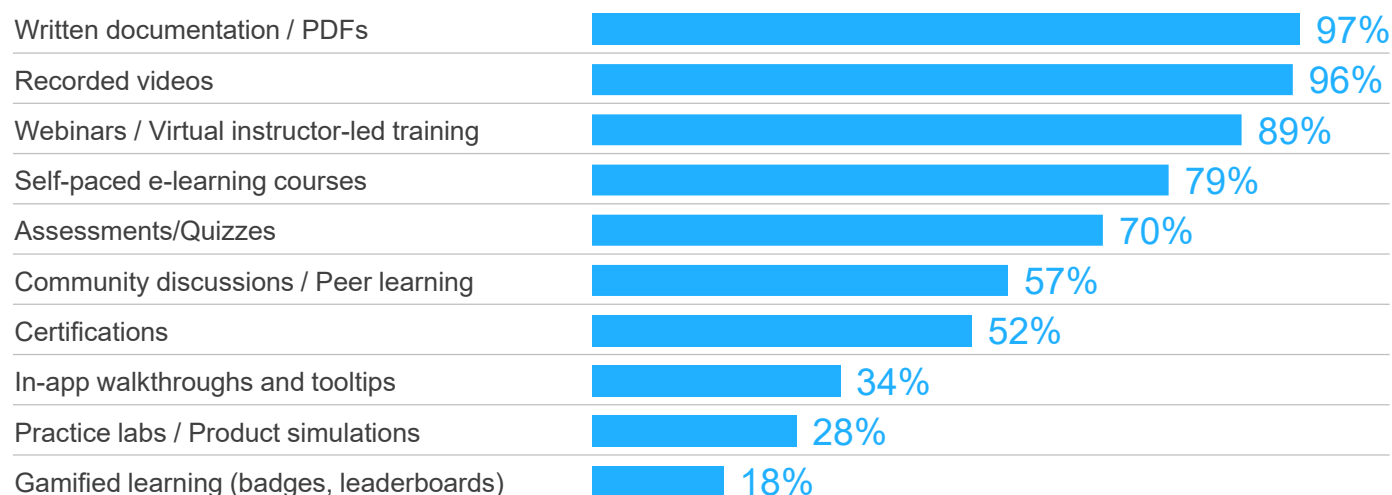
Reinforcement and application are emerging as the new benchmark for content maturity

Written documentation, webinars, videos, and self-paced courses remain the foundation of customer education. Maturity increasingly depends on how effectively that content is reinforced and applied. Best-in-class organizations extend learning through in-app guidance, peer interaction, gamification, practice labs, and product simulations. As AI makes content creation faster and more scalable, maturity depends on reinforcement and hands-on experiences rather than simply expanding content volume.

Exhibit 7 highlights that content adoption remains dominated by foundational formats, while experiential and application-oriented approaches are considerably less prevalent.

Exhibit 7: Content format adoption

Source: Everest Group (2026)



Content refresh is becoming faster and more responsive

Most enterprises have formalized content maintenance, with 84% reporting a review process and 87% refreshing content periodically. However, the maturity gap lies in the speed and responsiveness of refresh: 67% of Best-in-class programs operate on a structured ongoing cadence, compared with 9% of Basic programs. Best-in-class programs update content 6x faster. They increasingly connect refresh to product changes, learner feedback, and patterns of product use, moving from scheduled maintenance toward faster, signal-led updates.

Academies are expanding, but mature proficiency pathways remain limited

More than half of enterprises operate a content hub or repository with defined curricula and learning paths. However, only 17% have a fully established academy with role-based programs, certifications, clear ownership, and mature governance. Certification shows a similar pattern: 41% offer credentials with defined criteria but limited market recognition beyond the learning program as credible indicators of customer proficiency. Only 12% have structured, tiered certification programs with rigorous assessment and growing external recognition.

Monetization is emerging as a value layer around differentiated learning

Most enterprises continue to offer foundational customer education free of charge to support onboarding, adoption, and customer success. Monetization is typically introduced around offerings with clearer incremental value, such as certifications, instructor-led workshops, specialized programs, and subscriptions. This is considerably more prevalent among best-in-class programs, with 58% operating a freemium or fully commercialized education offering, compared with 15% of developed programs. The dominant model is therefore hybrid: broad access remains free, while advanced learning, formal validation, and high-touch experiences create selective revenue opportunities.

Key challenges

Enterprises typically face the following challenges as they broaden customer education across more audiences, lifecycle stages, and learning models.

- **Content breadth does not automatically create learner progression:** Most enterprises already offer substantial volumes of content. As coverage expands across roles and lifecycle stages, the challenge is organizing these assets into role-, journey-, and proficiency-based pathways so customers can progress from onboarding to advanced use without relying on CSMs or support teams to identify the next resource
- **Validating proficiency requires more than structured pathways:** Academies and certifications can organize learning, but many programs still emphasize course completion rather than readiness to apply knowledge. Building credible proficiency requires assessments, practical exercises, simulations, and market-recognized certifications that demonstrate what customers can do after learning

- **Program scale makes relevance and refresh harder to sustain:** Expanding across roles, lifecycle stages, products, and languages increases the volume of content that must remain current. This is a significant challenge, with 51% of enterprises citing limited internal capacity to produce and update content at the required pace. Product changes, insights into product use, learner feedback, and support inputs come from different stakeholders, making it further difficult to translate them into timely updates and consistent improvements

Best practices

Best-in-class enterprises strengthen program breadth and depth through the following practices.

- **Build structured academies around role-based pathways:** Organize learning into guided pathways supported by modular curricula, clear ownership, and progression aligned to customer roles and proficiency levels
- **Reinforce learning through bite-sized and immersive experiences:** Combine microlearning with gamified activities, simulations, and role plays to sustain engagement and strengthen customers' ability to apply knowledge in context
- **Embed education across the customer life cycle:** Position relevant learning across pre-sales, onboarding, adoption, support, and expansion by integrating it into customer portals, product workflows, support journeys, and account team interactions rather than limiting education to post-sale training
- **Strengthen certification through credible skill validation:** Move beyond completion certificates by using structured, market-recognized certifications that validate customer capability and readiness to apply learning
- **Continuously improve content through governance and learner feedback:** Combine structured content governance with product updates, learner feedback, and insights into product use to maintain relevance and improve learning experiences

“We have focused on creating structured learning paths for different customer personas, such as administrators, technical users, and business stakeholders. This targeted approach has improved content relevance and adoption.”

– Director, Customer Experience, a Europe-based technology software and services company

Technology and analytics

Technology and analytics assess whether customer education has the digital foundation and data capabilities required to deliver, scale, and continuously improve learning. It covers the maturity of the learning platform, its integration with enterprise systems, the depth of learner and content analytics, and how easily customers can discover and access learning. Maturity progresses from basic delivery and activity reporting to an integrated learning environment that enables coordinated journeys, contextual access, granular insights, and evidence-based decisions.

Exhibit 8 shows how technology and analytics differ across the four maturity stages.

Exhibit 8: Maturity progression in technology and analytics

Source: Everest Group (2026)

Technology and analytics	Basic	Emerging	Developed	Best-in-class
Platform maturity Defines the technology backbone of the program, from LMS/LXP foundation to its role in customer education delivery	Uses basic tools or repositories for content distribution, with limited structure, tracking, or program management	Adopts a learning platform but continues to use it mainly as a content repository, course-delivery platform, or onboarding hub	Scales a dedicated learning platform across multiple customer education programs and begins using it for targeted engagement across the customer lifecycle	Operates through an enterprise-grade learning environment that supports customer education as an engagement engine across the customer lifecycle
Business-system integration Covers integration of learning platform with enterprise systems to form a connected ecosystem	Maintains little or no integration between the learning platform and enterprise systems, and data remains siloed	Introduces selected point-to-point integrations, but connectivity across CRM, customer success, content, product, and support systems remains fragmented	Connects the learning platform with selected enterprise systems, enabling some cross-system visibility and targeted workflows, although integration remains incomplete	Operates through a connected ecosystem spanning learning, CRM, customer success, content, product, support, and marketing systems, enabling unified customer context and business-outcome visibility
Analytics maturity Covers the depth of learning measurement across participation, completion, satisfaction, content performance, and learner-journey visibility	Tracks basic activity metrics such as enrollment, attendance, and completion, with weak visibility into effectiveness, satisfaction or learner-journey behavior	Improves tracking across reach and completion, starts to capture satisfaction and content performance	Structures analytics more clearly around completion, satisfaction, and content performance and begins tracking learner drop-offs and journey behavior	Builds advanced analytics across content effectiveness and full learner journeys, including deeper behavioral insight into user drop-off points and time spent

Where the market stands

Several trends are shaping customer education technology across platform adoption, enterprise integration, learning discovery, and analytics maturity.

Dedicated learning platforms are now the foundation for customer education

The market has moved decisively away from ad hoc customer education delivered through email and other informal channels. About 57% of enterprises use a learning platform with standard capabilities such as course delivery and completion tracking, while 21% have progressed to fully integrated customer education platforms that support structured journeys and richer learner experiences. Enterprises typically combine in-house content with external resources such as YouTube, digital content libraries, and open-web content to complement formal learning and often embed these resources within the learning platform.

Platform integration differentiates mature customer education programs

Most organizations have established a core learning platform foundation, but maturity drops when the platform must connect with the broader enterprise ecosystem, including customer success platforms, CRM systems, content systems, product analytics, and marketing suites. While 56% of organizations have select business-system integrations, only 6% overall are fully integrated for targeting, reporting, and coordinated journeys. Limited integration also makes it harder to link customer education activity with customer and business outcomes, making ecosystem connectivity a key maturity gap.

Customer learning discovery remains largely channel-led and navigational

Email campaigns are the most common discovery route at 79%, followed by company websites at 75% and customer portals and CSM/account team outreach at 73% each. This reflects growing distribution of customer education across the broader customer experience, even as discovery continues to depend on customers navigating between channels and learning destinations.

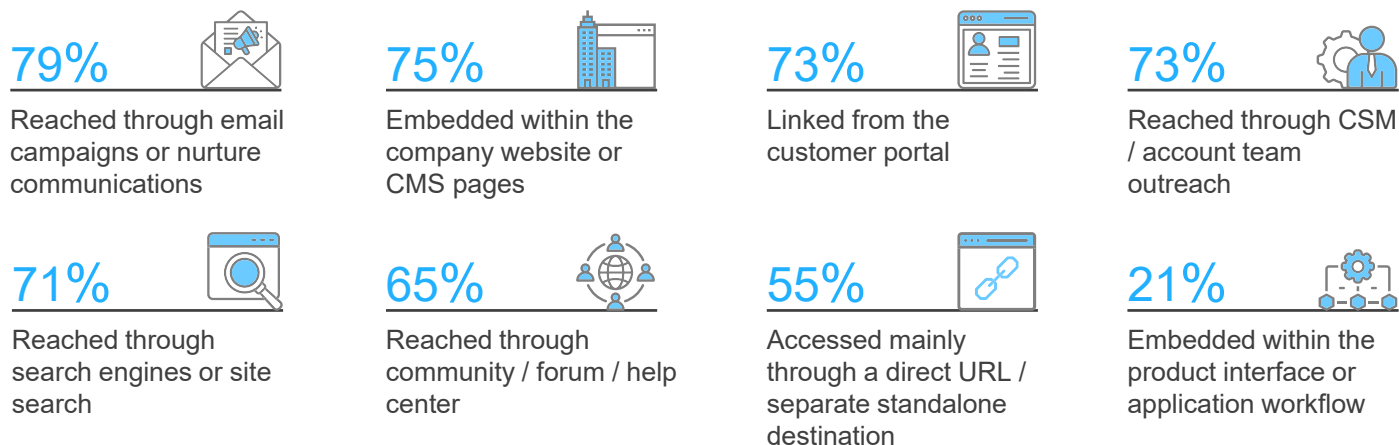
Exhibit 9 highlights the channels through which customers discover and access education, with email, communities, and customer portals serving as the leading entry points.

“We track how learners engage, how much of the course they finish, and what customers tell us. We share those findings with leaders and other teams so we can decide which new trainings to build and fix anything that is causing frustration for users.”

- Senior leader, Customer Success, a US-based automotive manufacturing company

Exhibit 9: Customer education discovery and access channels

Source: Everest Group (2026)



Analytics remains focused on participation and completion, with limited behavioral and outcome intelligence

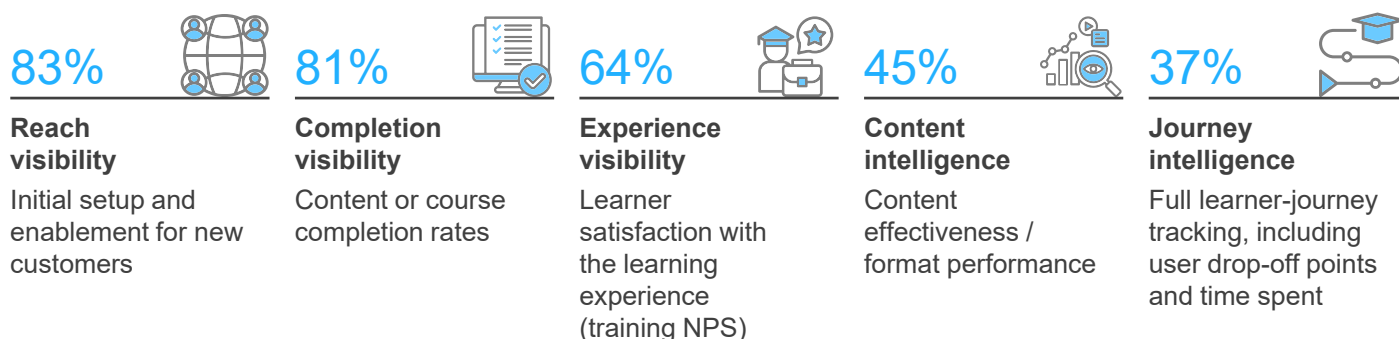
Most organizations have strong visibility into core learning activity: 83% track learner reach and 81% track completion at an intermediate or granular level, while 64% track learner satisfaction. However, visibility weakens when measurement requires deeper insight into content effectiveness, format performance, learner drop-offs, time spent, and the end-to-end learning journey. As a result, most organizations know who participated and completed training, but fewer can determine what worked, where learners struggled, or how education changed customer behavior.

Exhibit 10 highlights the level of analytics adoption in customer education, showing that organizations track participation and completion more consistently than learner behavior and business outcomes.

Exhibit 10: Level of analytics adoption in customer education

Source: Everest Group (2026)

% of organizations tracking analytics at the intermediate or granular level



Key challenges

The principal challenge organizations face is converting the learning platform into a connected, measurable, and discoverable customer education operating layer.

- **Legacy training-led mindset and fragmented ownership:** In some organizations, customer education is still viewed as a standalone training or content-delivery function rather than a lifecycle engagement lever. Shared or unclear functional ownership further weakens accountability and cross-functional coordination, leaving the platform as a repository rather than a customer engagement engine
- **Lack of an integrated platform ecosystem:** Customer education frequently spans disconnected tools or a standalone learning platform, limiting the ability to combine learning activity with product, support, and account context. This fragmentation also contributes to inconsistent data and reporting, cited as a significant challenge by 37% of enterprises, restricting deeper learner-journey analytics

Best practices

Best-in-class programs turn technology into an integrated layer that connects customer context and moments of action through the following best practices.

- **Build an integrated platform foundation:** Run customer education on a fully integrated platform rather than relying on ad hoc channels, fragmented tools, or a standalone LMS. Start with integrations that enable clear actions, such as assigning onboarding based on CRM stage, recommending learning based on product use, or triggering enablement when support patterns indicate a knowledge gap
- **Establish a shared customer and learner data model:** Connect learner identity with customer account, role, product access, lifecycle stage, and commercial attributes. Standardized identifiers create the foundation for targeting, account-level reporting, and outcome linking
- **Move from content repository to engagement engine:** Mature programs make education part of the customer engagement engine rather than a separate content repository. The model varies by industry, with technology enterprises more often embedding learning within product and digital workflows, while manufacturing enterprises typically use a dedicated academy or portal as the primary destination for structured learning
- **Strengthen analytics and customer journey visibility:** Build granular analytics first around reach and completion, then expand into content effectiveness, customer satisfaction, and journey behavior. Track search failures, drop-offs, low completion, customer feedback, and repeat support topics to identify content gaps and journey points that need action

AI leverage

AI leverage assesses how effectively organizations deploy and scale AI across customer education to improve content operations, personalize learning, simplify access, and trigger timely intervention. Maturity reflects how far AI has progressed from isolated, task-level applications to a context-aware layer spanning customer-facing and administrator-facing workflows. It also considers the depth of customer signals used and the extent to which AI can guide learning closer to the customer's moment of need.

Exhibit 11 shows the characteristics that differentiate the four maturity stages on AI leverage.

Exhibit 11: Maturity progression in AI leverage

Source: Everest Group (2026)

AI leverage	Basic	Emerging	Developed	Best-in-class
AI use case breadth Range and strategic relevance of AI applications across learner, administrative, and customer-facing workflows	AI use is limited to individual experimentation with content drafting, translation, and basic search	Selected AI capabilities are introduced within the education function, including smarter search, chatbots, content recommendations, and limited content automation	AI is adopted across a broader set of content, discovery, personalization, learner support, and administrative use cases, but implementation remains selective across the program	Uses AI across learners, administrators, and sales teams, with broad adoption in search and discovery, support automation, and chatbots, and deeper use of intelligence
Personalization intelligence Extent to which AI uses learner and customer context to tailor education	Personalization is manual or rules-based; segmentation, where it exists, is confined to role or product line	AI generates recommendations from static learner-profile data; outputs are generic and rarely refreshed	Broadens the data foundation by adding product and lifecycle context, while account and support signals remain limited	AI dynamically personalizes learning paths for most customer segments based on product activity, lifecycle stage, and engagement
Delivery and access maturity Extent to which AI makes learning discoverable and accessible within customer workflows	Keeps education largely destination-led, with limited surfacing across touchpoints such as email and websites	Expands discovery across email, websites, portals, and search-engine channels, but learning remains weakly embedded in other customer workflows; conversational access remains nascent	Extends multi-channel discovery across portals, websites, search, communities, and customer-facing teams. Product-embedded discovery and conversational AI begin to appear in select workflows, but adoption remains limited	Combines multi-touchpoint discovery with embedded, conversational, and in-flow learning experiences. Learning is visible within product workflows through embedded academies, digital adoption platform tooltips and guidance, and, in some cases, in-product chat interfaces

Where the market stands

Several trends are shaping AI adoption in customer education across search, personalization, conversational access, predictive intelligence, and agentic applications.

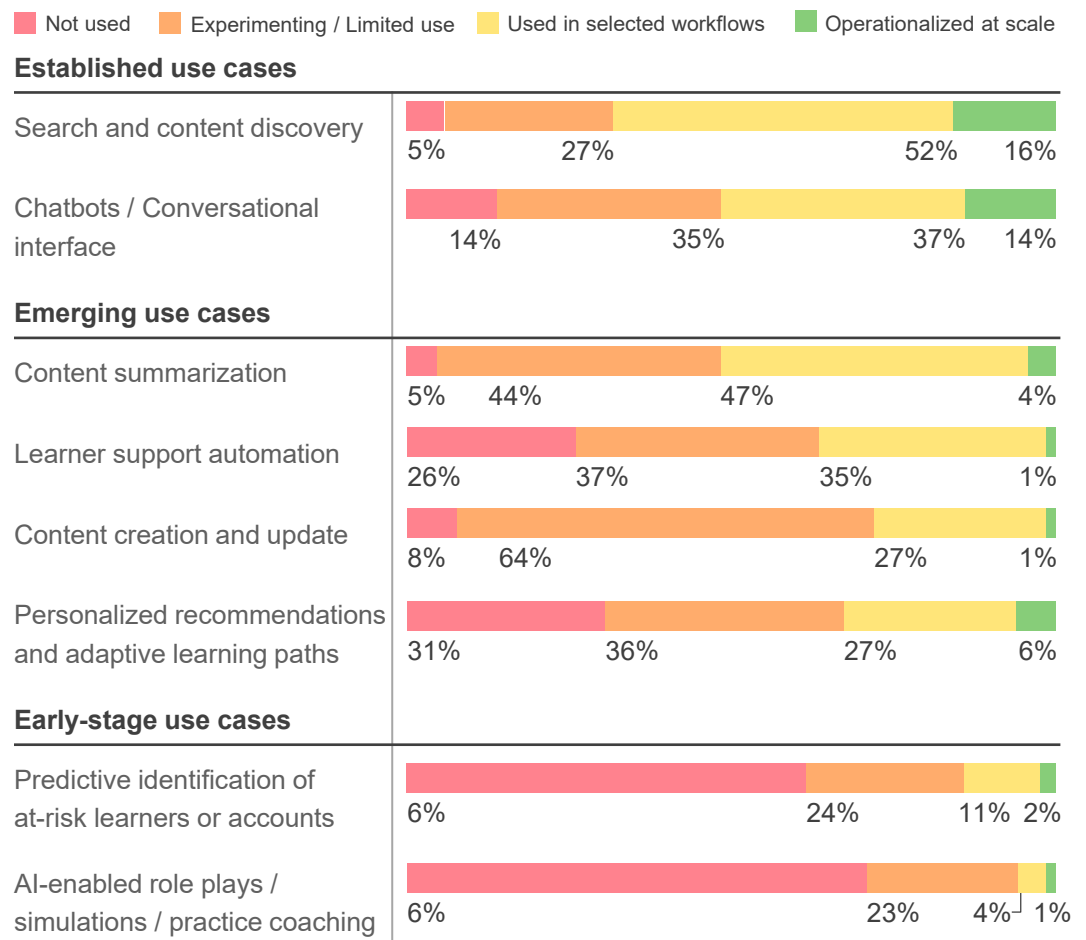
AI is becoming an access layer before it becomes a decision layer

AI adoption in customer education is advancing, but not evenly. Organizations are scaling use cases that help customers find information and improve team productivity, while capabilities that require richer customer context, stronger integration, and greater autonomy remain significantly less mature. Search and content discovery has the highest active adoption, with 68% of organizations using it in selected workflows or at scale, followed by chatbots and conversational AI. By contrast, AI-driven personalized recommendations and predictive identification of at-risk accounts remain at an earlier maturity stage. Agentic AI is still largely limited to early pilots.

Exhibit 12 highlights the adoption of AI across customer education use cases, with search and content discovery advancing faster than personalized, predictive, and agentic applications.

Exhibit 12: AI adoption level across customer education use cases

Source: Everest Group (2026)



The market is shifting toward AI-assisted personalization, but signal depth remains limited

Organizations are moving beyond rules- or segment-based personalization toward AI-assisted approaches that use multiple signals to recommend or adapt content for individual customers. However, most personalization still relies on customer-level data, such as role, region, course history, completions, search behavior, and, in some cases, engagement patterns. Best-in-class organizations go further by incorporating product use, lifecycle stage, account health, support interactions, and adoption gaps to align learning more closely with customer success needs. Even among these organizations, the use of account- and support-level intelligence remains relatively nascent.

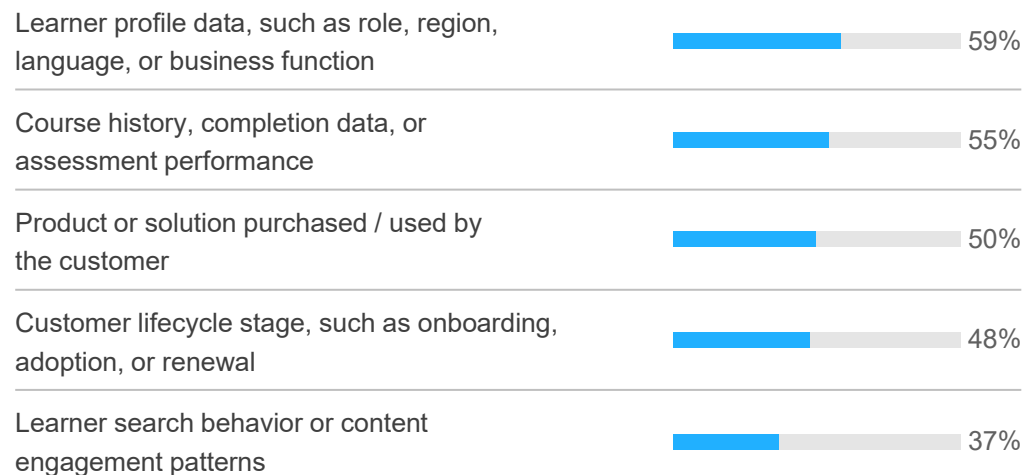
Exhibit 13 shows that organizations still rely primarily on learner and course data for personalization, while product use, account health, and support signals remain underused.

Exhibit 13: Data signals used for personalization

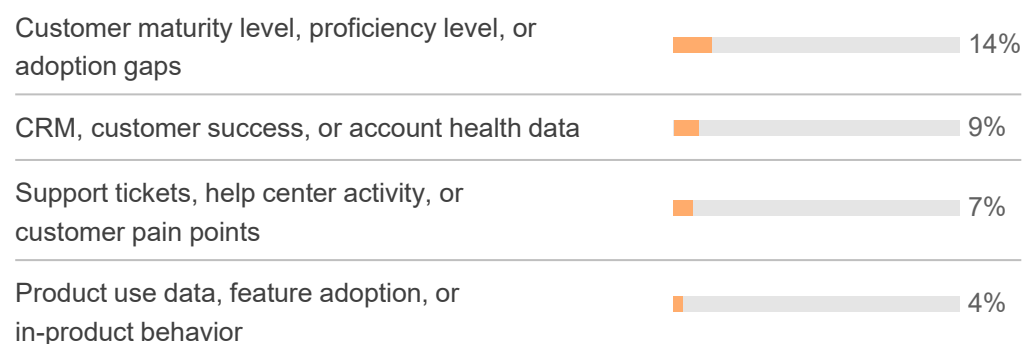
Source: Everest Group (2026)

% of organizations using the data signal for personalization (n=150)

Top data signals used for personalization



Bottom data signals used for personalization



Multi-touchpoint access is becoming standard, while conversational AI remains less mature

The market is moving away from standalone academies that customers must intentionally visit. Survey findings show that 77% of organizations have progressed beyond a purely destination-led delivery model, and 63% now surface learning across multiple touchpoints, including websites, portals, email, search, communities, support channels, and sales outreach.

However, in-product discovery remains an important maturity differentiator, with meaningful adoption concentrated among best-in-class organizations. Here, learning is typically surfaced through an embedded LMS or academy link, or more commonly through digital adoption platforms using walkthroughs, tooltips, and checklists within the product experience.

The larger maturity gap lies in conversational, in-flow access, where customers can ask questions within a product, portal, or support page and receive a personalized answer or next step without navigating a course catalog.

Key challenges

Organizations face the following challenges as they attempt to move from isolated AI adoption to a scalable, context-aware operating model.

- **Fragmented data infrastructure:** In most organizations, learning, product, support, and account data reside in separate systems, making it difficult to provide AI with a unified customer context. This limits AI primarily to a search or routing interface rather than a personalization layer that guides customers toward the next-best action
- **Limited governance for scaling AI-enabled content operations:** Organizations may experiment with summarization or content creation but lack defined ownership, review standards, quality controls, and update workflows. This makes it difficult to expand AI use while maintaining content accuracy, relevance, and consistency
- **Conditional trust in AI-generated outputs:** Concerns around accuracy, accountability, and compliance continue to slow customer-facing deployment, particularly in regulated and technically complex environments

“We are beginning to play with AI features like smart search, content summaries, and personalized learning recommendations. In the future, agentic AI will actively guide learners by recommending training, next steps, and automated support through conversational assistants.”

- Director, Support / Customer Support, a US-based consumer goods manufacturing company

Best practices

The following best practices provide a practical path to advancing AI leverage in customer education:

- **Prioritize AI through a use case portfolio:** Scale proven, high-utility use cases first, such as content summarization, translation, tagging, and drafting. As data quality, governance, and trust improve, enterprises can progress toward personalized recommendations based on customer context, predictive interventions that flag adoption risks or disengagement, and agent-led guidance that answers questions and recommends the next-best learning or action
- **Make learning access conversation-led:** Create multiple access and discovery paths instead of relying on a single academy destination. Further, move beyond multi-touchpoint distribution to a conversational in-flow by enabling customers to ask questions, receive guidance, and access next-best learning in the flow of their experience
- **Build a customer-context data layer:** Use learner data as the foundation, then layer in product use, lifecycle stage, account health, support interactions, and adoption-gap signals to enable richer and more relevant personalization. For example, enterprises can surface relevant learning when product use indicates a capability gap or trigger targeted guidance when recurring support activity points to a knowledge need
- **Industrialize content operations with AI:** Apply AI to accelerate content summarization, creation, and maintenance while retaining human oversight for quality, relevance, and accuracy. Strengthen the underlying content foundation through consistent taxonomy, metadata, ownership, and version control

Governance model

Governance examines how customer education is organized, owned, and resourced across the enterprise. It assesses whether the program has a defined operating model, an accountable functional owner, and formal decision-making mechanisms. Mature governance does not require every activity to sit within one team; it requires one function to remain accountable while product, customer success, support, marketing, and regional teams contribute through clearly defined roles. Strong governance enables customer education to move from a collection of activities to a sustained enterprise capability.

Exhibit 14 shows how governance model differs across the four maturity stages.

Exhibit 14: Maturity progression in governance model

Source: Everest Group (2026)

Governance	Basic	Emerging	Developed	Best-in-class
Operating model Determines how customer education is governed and managed across the enterprise	Governance remains fragmented. Education is managed reactively across teams, without a formal charter, decision process, or leadership oversight.	Governance becomes more structured through shared ownership, but strategic decisions continue to be distributed across multiple business functions rather than a single accountable team.	Governance shifts from coordination to ownership, supported by a defined strategy, roadmap, governance cadence, and cross-functional participation.	Governance operates through an executive-led structure, with governance councils and formal reviews guiding investment priorities, roadmap decisions, and outcome tracking.
Functional ownership Defines clarity of responsibility for day-to-day program management	Ownership is distributed across product, customer success, support, marketing, and training teams, with no single function accountable for the program.	A lead function begins coordinating delivery, but ownership remains shared and accountability is not consistently enforced.	A named function or team owns program delivery, priorities, standards, and performance management.	A dedicated customer education or customer enablement function holds end-to-end accountability, while defined partners own specific execution responsibilities across the customer life cycle.
Resource allocation Assesses consistency of budget and dedicated staffing	Funding is ad hoc, and customer education responsibilities are absorbed by existing teams.	A recurring budget or limited dedicated capacity exists, but resourcing remains vulnerable to competing priorities.	The program has a fixed budget and dedicated team sized to support defined priorities and delivery needs.	Investment is aligned with program scale, strategic priorities, and expected outcomes, with capacity reviewed through formal planning.

“We need more frequent and tighter interlock with the product organization to understand roadmap content and timing. We also need closer collaboration on refining content and coordinating customer communication across CSM, marketing, and GTM teams as new functionality is released.”

- C-level, Customer Success, a US-based technology software and services company

Where the market stands

Several trends are shaping customer education governance across functional ownership, cross-functional accountability, budget commitment, and dedicated resourcing.

Customer education remains a cross-functional capability

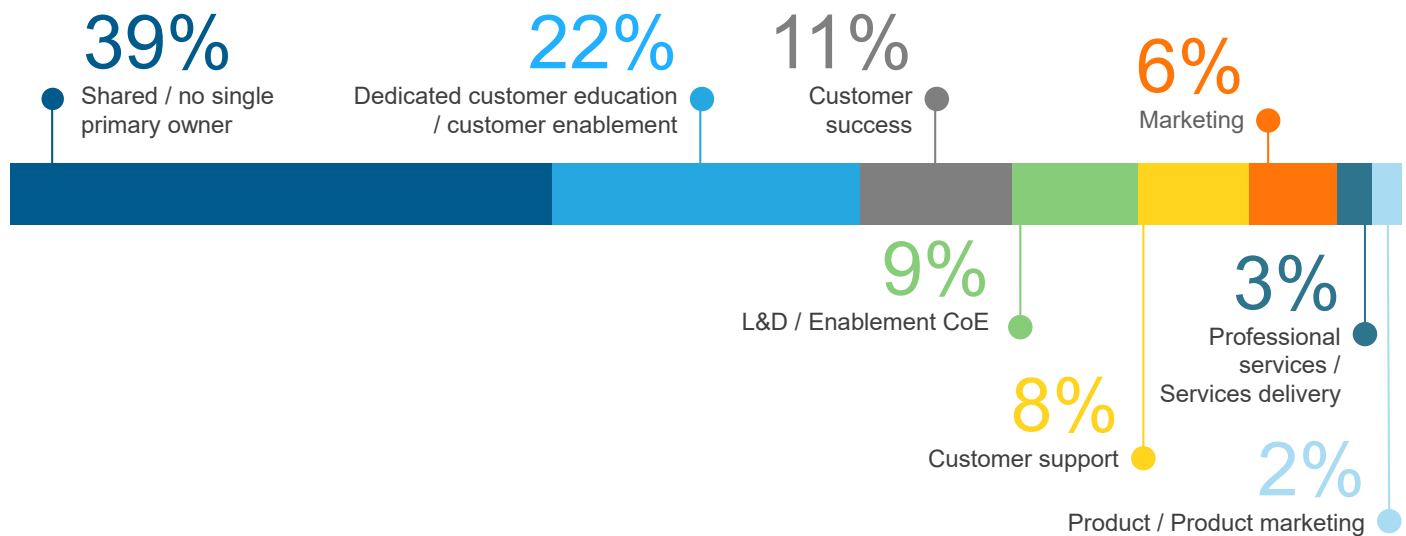
Most organizations have moved beyond completely ad hoc structures; however, informal shared governance continues to be the dominant model for less mature programs. 39% of organizations report shared ownership with no single primary owner, making it the most common model.

Only 22% place customer education within a dedicated customer education or customer enablement function. Customer success is the primary owner in 11% of organizations, followed by L&D or enablement centers of excellence at 9%. The issue is therefore not that multiple teams are involved; customer education is inherently cross-functional. The maturity gap lies in whether collaboration is anchored by clear accountability.

Exhibit 15 illustrates how fragmented ownership persists across functions, underscoring the need to pair cross-functional participation with clear accountability.

Exhibit 15: Customer education functional ownership

Source: Everest Group (2026)



Budget commitment is advancing faster than governance maturity

Formal funding is more established than formal ownership. Survey findings show that 80% of enterprises have an annual customer education budget, with 37% allocating more than US\$500,000 annually. Meanwhile, 85% have at least three people supporting the function, whether on a part-time, shared, or dedicated basis. This suggests that many enterprises are committing resources before fully defining who owns the function, how priorities are set, and who is accountable for outcomes. The next maturity shift requires stronger governance over how enterprises direct that investment, rather than simply introducing more funding.

Key challenges

The central governance challenge is converting growing cross-functional participation and dedicated resources into a coherent decision-making model, as cited by 47% of enterprises as a significant challenge. Customer education depends on inputs that sit across the enterprise, including product roadmap timing, content development, customer communications, learner support, and regional delivery. These activities often follow different priorities and planning cycles, making it difficult to align what should be developed, when it should be released, which audiences should be prioritized, and how success should be measured. As programs expand, governance forums may therefore remain focused on coordinating activities and reviewing progress rather than resolving trade-offs across funding, roadmap priorities, and customer needs.

Best practices

The following practices can help enterprises translate cross-functional participation into clear accountability.

- **Establish a clear customer education owner:** Place day-to-day accountability within a dedicated customer education or customer enablement function rather than relying solely on shared ownership across business functions
- **Formalize the governance model:** Move from informal coordination to a function-led or executive-sponsored operating model with clearly defined responsibilities, decision rights, governance cadence, and leadership sponsorship
- **Align investment with program ambition:** Support customer education with dedicated annual budgets and specialist resources that can scale content operations, learner support, platform management, and governance
- **Create structured operating rhythms:** Establish shared roadmaps, governance reviews, content governance processes, and performance dashboards that align product, customer success, support, marketing, and other stakeholders

Enablement and activation

Enablement and activation assess how effectively organizations drive customers toward learning and translate participation into sustained engagement. The dimension covers how programs are promoted, how Customer Success Managers (CSMs) and account teams are equipped to recommend learning, and how recognition and incentives reinforce participation.

Maturity increases as enterprises move beyond campaign-led promotion and completion-based recognition toward coordinated, contextual activation across the customer journey. More mature programs make learning easier to discover at relevant moments and use verifiable credentials, customer awards, or early product access to strengthen continued engagement, practitioner credibility, and advocacy.

Exhibit 16 shows how enablement and activation differ across the four maturity stages.

Exhibit 16: Maturity progression in enablement and activation

Source: Everest Group (2026)

Enablement and activation	Basic	Emerging	Developed	Best-in-class
Program promotion Considers how actively and strategically the program is marketed to customers	The program is not actively promoted; customers discover it on their own.	Promotion is limited to select touchpoints such as onboarding emails, documentation, or support interactions.	Regular promotion runs across multiple channels with defined messaging, though not yet fully coordinated.	Education is strategically marketed as a core customer benefit through coordinated campaigns, clear ownership, and leadership visibility.
Channel breadth Evaluates how many promotional channels reinforce awareness and how well they are coordinated	Promotion, where it exists, relies on a single channel with no coordination across touchpoints.	Two to three channels are used, typically email and webinars, without a unified promotional cadence.	Four or more channels are activated in parallel, spanning email, webinars, CSM outreach, and community.	Channels operate as one system: in-product, email, CSM, partner, and community touchpoints reinforce a single narrative.
CSM enablement Assesses how equipped customer success managers are to drive education adoption	CSMs are not actively involved in promoting or reinforcing customer education.	CSMs share education links reactively, only when a customer specifically asks.	CSMs follow a defined playbook, recommending education at key lifecycle moments.	CSMs operate with a full enablement toolkit, including training data, health-score integration, and education-linked outreach sequences.
Recognition programs Outlines how enterprises use credentials, recognition, and rewards to reinforce learning and sustain engagement	No incentives are offered; completion carries no reward beyond the learning itself.	Digital badges or completion certificates are the primary incentive offered.	Structured recognition programs, such as badges, leaderboards, certificates, or community spotlights are in place.	Recognition is embedded in a broader advocacy program, with formal awards, certifications, and visible customer promotion.

Where the market stands

Several trends are shaping customer education activation across promotion channels, CSM-led engagement, in-product reinforcement, and learner recognition.

Promotion is well established, but activation remains concentrated in traditional channels

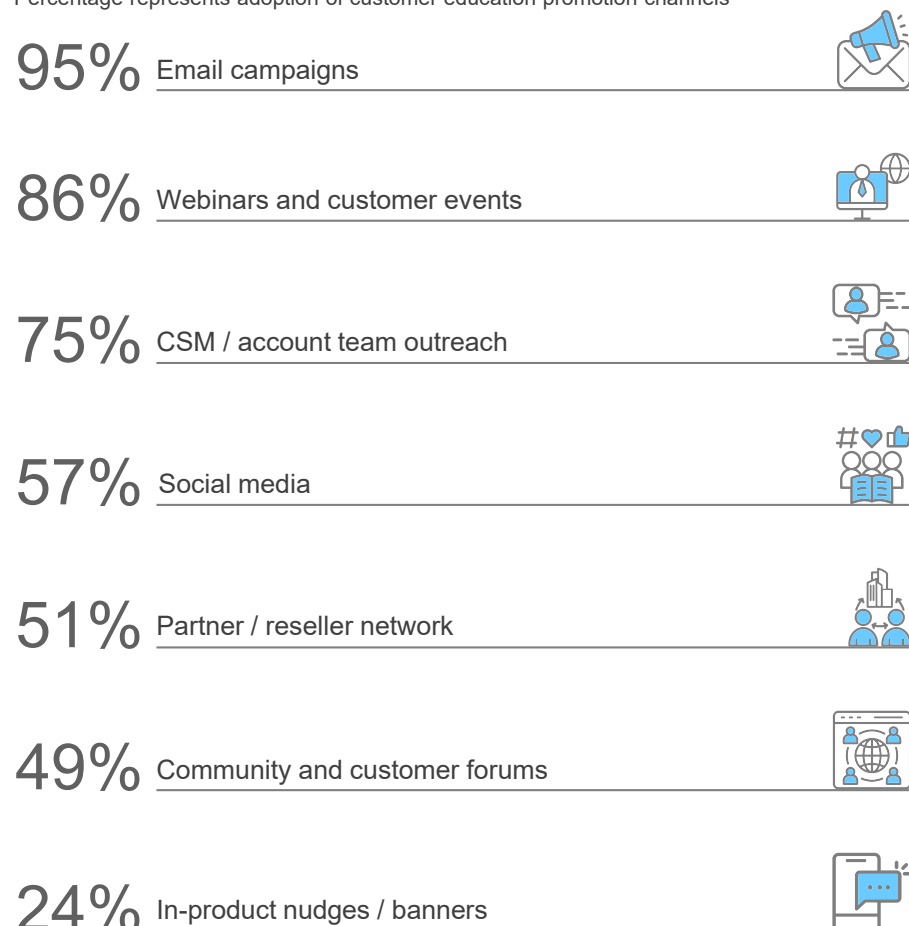
Enablement and activation today is a story of reach without reinforcement. Enterprises have proven they can promote education broadly and reward participation symbolically. Email, webinars, events, and CSM outreach provide broad visibility, with email campaigns used by 95% of enterprises. However, promotion remains largely push-led, while more embedded channels are less established, with only 24% using in-product nudges or banners.

Exhibit 17 shows that customer education promotion remains concentrated in broad-reach channels, while adoption of in-product reinforcement at the point of need remains limited.

Exhibit 17: Promotion channels for customer education programs

Source: Everest Group (2026)

Percentage represents adoption of customer education promotion channels



CSMs are emerging as a stronger activation channel

Organizations are moving beyond expecting customers to discover learning on their own. Many are creating defined playbooks that help CSMs introduce relevant education during onboarding, adoption, and other key lifecycle moments. Best-in-class programs strengthen this approach with customer participation data and account health signals, enabling CSMs to guide customers toward the right learning at the right time.

Recognition is expanding beyond completion

Enterprises primarily motivate participation through digital badges and certificates, while more mature programs extend recognition through customer awards, exclusive access, and verifiable credentials. Among best-in-class enterprises, most use digital badges and customer awards, while 85% offer early access to new features and publicly verifiable credentials. These mechanisms help connect learning achievement with practitioner credibility, customer status, and continued engagement.

Exhibit 18 shows how customer education programs are expanding recognition beyond course completion to reinforce practitioner credibility, customer status, and continued engagement.

Exhibit 18: Customer recognition and incentives

Source: Everest Group (2026)



“We promote education through dealer portals, webinars, and account team outreach to increase awareness and participation across members.”

- Manager, a US-based wholesale and distribution company

Key challenges

Survey findings show that 42% of enterprises cite low learner engagement and adoption as a challenge. They typically face two interconnected challenges as they seek to convert broad program visibility into sustained participation and meaningful learner recognition.

- **Lack of narrative coordination across channels:** Even when enterprises use multiple channels to promote customer education, messaging is often fragmented. Customers may receive inconsistent or duplicated promotions across customer success, marketing, partner, community, and in-product channels rather than one coordinated narrative linked to their context and next required action
- **Incentive design remains largely symbolic:** Badges and certificates are widely established, but their ability to motivate continued participation is limited when they do not carry value beyond the learning program. Enterprises therefore face the challenge of connecting achievement with credible recognition, community visibility, or influence opportunities

Best practices

Best-in-class enterprises typically adopt the following practices to strengthen enablement and activation.

- **Make learning harder to miss:** Extend education promotion beyond email and webinars by embedding education in product workflows, customer communities, partner channels, and account conversations
- **Equip CSMs with actionable learning insights:** Provide customer-facing teams with account-level training data, outreach playbooks, and adoption signals to make education a proactive part of customer conversations
- **Strengthen recognition beyond completion:** Move beyond badges and completion certificates by using publicly verifiable credentials, customer awards, early product access, and beta or advisory programs to increase customer engagement and advocacy
- **Create a coordinated activation narrative:** Establish a common customer education narrative and coordinate outreach across customer-facing teams and digital touchpoints to reduce duplication and guide customers toward the next relevant learning action

Case study: UiPath Academy's evolution into a global customer education ecosystem

Company background

UiPath is a business orchestration and automation company that built its market leadership in Robotic Process Automation (RPA) and has since expanded into agentic automation, business orchestration, and agentic testing.

UiPath Academy began as a response to a market education gap. As RPA adoption grew, companies and practitioners needed to understand the technology, apply it in real enterprise contexts, and build confidence in automation programs. Over time, Academy evolved from building broad market awareness and understanding of RPA into a strategic customer education engine focused on adoption, value realization, partner readiness, and practitioner ecosystem development.

Challenges faced

As Academy scaled, UiPath needed to support a large global learner base spanning multiple roles, skill levels, and learning needs. It also needed to balance broad access with formal skill validation and combine structured learning journeys with flexible, self-directed discovery. UiPath also needed a platform foundation that could support scale, reliability, and customization without disrupting existing learners.

The solution

UiPath built its customer education model around four design principles.

- **Role-based learning architecture:** UiPath adopted a scientific approach to customer education by identifying the key roles required for successful
- **Automation programs and conducting job task analysis with practitioners** to define responsibilities, skills, prerequisites, seniority levels, and learning paths for each role
- **Guided journeys and flexible discovery:** UiPath created structured learning plans and certification pathways for core roles, while also allowing learners to explore the broader course catalog based on specific learning needs
- **Open-access learning:** UiPath kept learning content free to reduce friction and maximize reach. Certifications remain paid, creating a formal validation layer without limiting access to learning
- **Enterprise-grade platform foundation:** To support the next stage of scale, UiPath adopted Adobe Learning Manager as the core learning platform and used its headless capabilities to deliver a custom learner experience aligned with the UiPath brand, audience model, and long-term learning architecture

AI-enabled evolution of UiPath Academy

UiPath is extending its customer education model through AI in the following ways.

- **Conversational learner support:** UiPath is exploring AI-powered learner support experiences that can understand learner context, skill gaps, and aspirations, with the longer-term vision to evolve these into AI agents that create hyper-personalized learning paths
- **Embedded learning experiences:** UiPath is evolving Academy from a destination into a more flexible learning layer, where relevant content can be surfaced across products, workflows, and support experiences in the moments of need
- **Gen AI-enabled content development:** UiPath is using generative AI across analysis, design, development, copywriting, multimedia asset creation, and course development, while maintaining human review and quality control
- **Immersive learning experiences:** UiPath is using AI to build custom applications that emulate enterprise environments and embed learning into product-like experiences

Outcomes achieved

UiPath achieved the following benefits from its customer education program:

- More than 2.2 million registered Academy users
- More than 70% of paying customers have at least one Academy user
- Learning content localized into multiple languages
- Stronger customer and partner readiness and enhanced confidence through structured learning paths, certifications, community, documentation, and support resources
- A more scalable platform foundation for AI-enabled and embedded learning experiences

Customer education readiness checklist

Customer education maturity depends on how well program capabilities work together to support customer needs and business outcomes. The following checklist helps leaders assess the strength of their current foundations and identify areas that need greater focus as the program evolves.

Parameters	Key evaluation questions
Impact	✓ Does the customer education program have clearly defined customer and business goals, such as faster time-to-value, stronger product adoption, or greater customer confidence? ✓ Does the enterprise measure the operational impact of customer education, such as onboarding speed, self-service, or support efficiency? ✓ Can learning activity be connected with account-level data, such as product use, account health, retention, or expansion, to assess the relationship between education and business outcomes?
Program breadth and depth	✓ Are customers guided through role- or proficiency-based learning pathways that help them understand what to learn next? ✓ Does customer education extend beyond core customers to audiences such as partners, administrators, technical users, or other specialist roles? ✓ Does education support customers across lifecycle stages beyond onboarding, including pre-sales, adoption, support, advanced use, or expansion? ✓ Does the program use microlearning formats and gamified experiences to reinforce learning and sustain customer engagement over time? ✓ Is content continuously refreshed based on product changes, learner feedback, and use or support signals?
Technology and analytics	✓ Is customer education supported by a dedicated learning platform rather than fragmented tools and channels? ✓ Is the learning platform connected with enterprise systems such as CRM, product, customer success, or support platforms? ✓ Can learning be surfaced where customers need it, including the academy, product, portal, support journey, or other customer touchpoints?

Parameters	Key evaluation questions
Technology and analytics (continued)	✓ Do analytics provide visibility beyond participation and completion into areas such as content effectiveness, drop-offs, search failures, and learner journeys? ✓ Are learning insights used to improve customer experience and inform customer-facing teams or business decisions?
AI leverage	✓ Is AI used in repeatable customer education workflows such as search, content creation, summarization, or learner support? ✓ Are AI-generated outputs governed through defined human review, quality controls, and approval processes? ✓ Can AI use customer context, such as role, product use, lifecycle stage, or prior learning activity, to make learning more personalized? ✓ Can customers use conversational interfaces to ask questions and receive governed answers, guidance, or relevant learning as part of their workflow?
Governance	✓ Is there clear accountability for customer education, with an operating model aligned to the program's customer and business objectives? ✓ Are the roles, responsibilities, and decision rights of contributing functions, such as product, customer success, marketing, and support, clearly defined? ✓ Do governance forums actively set priorities, resolve trade-offs, and review program performance? ✓ Are dedicated budgets and specialist resources available to support and scale the program?
Enablement and activation	✓ Does the enterprise actively and consistently promote customer education across relevant customer channels? ✓ Is education activation coordinated across channels, such as account teams, campaigns, communities, product touchpoints, and other customer interactions? ✓ Do customer-facing teams have the learning insights and guidance needed to direct customers toward relevant learning when needed? ✓ Does recognition extend beyond course completion to provide visible or meaningful value, such as verifiable credentials, customer awards, or other visible forms of achievement?

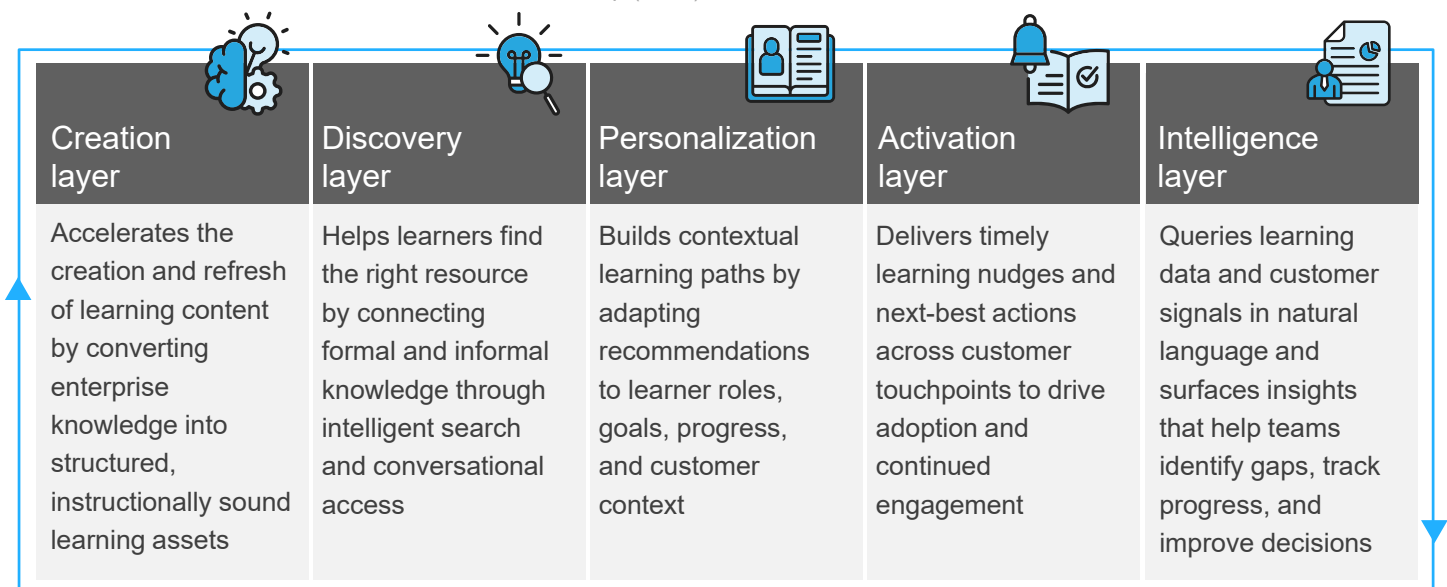
The way forward

The next phase of customer education will build on the foundations established by best-in-class programs: structured role- and lifecycle-based pathways, integrated platforms, formal governance, omnichannel activation, and clearer link to customer and business outcomes. These capabilities will determine whether AI creates meaningful customer context and action. In the future, AI will play a much larger role in customer education: AI will shift the maturity frontier toward more intelligent, context-aware, and responsive customer education.

Exhibit 19 shows how AI can reshape customer education through five connected layers.

Exhibit 19: Key components of an AI-enabled customer education program

Source: Everest Group (2026)



The five layers will increasingly operate as a closed learning loop. The system will sense a learning need from a customer question or from role, use, support, and account signals; recommend the relevant answer, path, workflow step, or coaching moment; deliver it through the most appropriate touchpoint; measure completion, adoption, support deflection, retention, and account movement; and improve or stop the intervention based on the result. This shifts customer education toward an agent-orchestrated system that continuously learns from customer behavior. In the future state, agents will be able to surface learning at the point of need, adapt pathways, convert formal and informal knowledge into governed answers, guide users within workflows, and generate impact evidence.

Conclusion

Customer education is becoming an increasingly important lever for accelerating product adoption, strengthening self-service, and improving customer value realization. Best-in-class programs stand apart not because of any single capability, but because they connect program design, technology, governance, activation, and measurement into a coordinated system that makes education easier to access, more relevant to customer needs, and more closely linked to action.

AI is accelerating this shift by helping organizations create and refresh content faster, improve discovery, personalize learning, surface guidance closer to the moment of need, and convert learning signals into actionable insights for customer-facing teams. However, AI creates the greatest value when it builds on strong foundations, including structured pathways, integrated data, clear ownership, trusted content, and measurable outcomes.

The path forward will differ by maturity stage. Organizations should identify the capability gaps most relevant to their current model and prioritize focused actions that strengthen the overall system. Enterprises should sequence investments in the capabilities that make customer education more embedded, intelligent, and impact-led rather than pursue every maturity lever at once.

Appendix

Research methodology

To understand enterprise priorities, practices, and maturity in customer education, Everest Group conducted a targeted survey of 150 customer education leaders across North America and EMEA, representing diverse industries. The research also included select interviews with leaders across customer education, enablement, success, marketing, product, support, and sales.

Everest Group supplemented survey and interview findings with its proprietary databases and verified secondary research. Inputs were then triangulated to identify common maturity patterns, key differentiators, operating model variations, and best practices across customer education programs.

Exhibit 20 highlights the survey respondent profile across industries, geographies, and enterprise sizes, providing context for the maturity findings that follow.

Exhibit 20: Respondents' profile by industry, enterprise size, and geography
Source: Everest Group (2026)

Respondent profile by broader industry split					
Hi-tech	37%	Manufacturing	20%	Healthcare and pharma	17%
BFSI	16%	Retail and e-commerce	5%	Others	5%
Respondent profile by employee size					
100,000 or more	13%	50,000-99,999	10%	10,000-49,999	35%
5,000-9,999	13%	1,000-4,999	21%	500-999	7%
100-499	1%	Fewer than 100	0%		
Respondent profile by geography					
United States	58%	Europe	27%	Middle East	6%
United Kingdom and Ireland	5%	Rest of the world	4%		

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