Goals, Strategies and Expected Return on Investment of Customer Education: An Exploratory Case Study

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"The Purpose of Business is to Create and Keep a Customer" Peter F. Drucker

Abstract

The aim of this research is to provide insight and deeper understanding of the goals, strategies and expected return on investment of customer education by organizations of coffee companies in Italy. For this study, the following research questions were posed: How the goals and strategies of customer education initiatives by the organization can be described? And how the expected return on investment of the customer education initiatives by organizations are described? Based on the above discussions, the main objectives, strategies and expected benefits of educational initiatives for customers by the School coffee.

Through this research, it was found that the customer education process to create value, must obey to the five following qualities: be easy, be relevant, be fresh, manageable and measurable.

At the end of this study, the results indicate that the main goals, strategies and the expected return on investment of customer education initiatives by those organizations were higher profitability, cost reduction, customer performance, customer satisfaction, customer retention and loyalty and the positive impact on the overall performance of the organization in the long term.

Based on this, implications for managing customer education from the distributor perspective and future research direction are subsequently discussed.

Keywords: Customer education, Consumer loyalty, Customer satisfaction, Customer Value.

JEL classification: M 31.

1. Introduction

For many companies, customer education is a built-in problem that needs to be addressed before, during, and after a challenging product is brought to market. Nowhere is this more apparent than in the world of food sector. The amount of information, misinformation, and conflicting reports can be difficult to sift through, even (and perhaps especially) when credible science enters the mix. The good news is that customers are better informed than ever when it comes to making purchases. The bad news is that there's often little difference between marketing materials and educational materials […]. So, based albeit on limited data, we can introduce this study by this slogan "*Don't Market To Your Customers; Educate Them Instead*" provided by Craig William (2015) cited in Forbes (2015).

Customer education refers to the role of a company providing consumers with the information, skills and abilities needed to become a more informed buyer. While it can take many different forms (Monnot, 2010), customer education is most effective when used to engage customers and online shoppers in stores. However, while the desired message is always the same, these two clients forming areas can vary considerably (Larry Alton, cited in "http://customerthink.com", 2015).

Based on the problem discussions the overall purpose of this paper is to provide a better understanding on the use of Customer Education in Business to Distributors (B2D) firms. An exploratory qualitative study has been carried out in order to address the following research questions juxtaposed to the general question of how Customer Education create value with regard to SME in a B2D market:

- *How can the goals and strategies of Customer Education initiatives by SME be described?*
- *How can the expected return on investment of Customer Education initiatives by SME and Customer value are described?*

2. Literature Review
2.1. The concept of Customer Education

Customer education is a process which teaches customers and prospects how to get more value out of your product or service. Honebein and Cammarano (2005) define customer education as 'the companies' investments in instructional activities aimed at improving customer expertise in relation to the goods and services they market'.

Customer education is a process aimed at informing and training customers in order to increase their knowledge levels (basic, general, and deep). It is assuming an increasing importance because of its ability to affect customer perceived value in terms of benefits and outlays (Bonfanti and Brunetti, 2014). After customer education session, the customer should be aware of the performance of the similar product available so that he could make his analysis (Sharma and Peterson, 1999).

2.2. The Objectives of Customer Education

According to Aubert (2006, pp. 31) customer education support customer in the use of a product. Best (2005) states that the inability to use a product can prevent a market from expanding to its full potential. Vargo and Lusch (2004a, 2004b) suggest that customers appreciate the value of products mainly by using them. Fornell and Wernerfelt (1988, pp. 289) also reminded us that most buyer complaints are related to customer experience problems while using the product. Rust et al. (2006) illustrate this aspect. They reported that 9% of consumers returned a home networking product they bought. 85% of these returns "were simply because people couldn't get the equipment to work" (Rust et al., 2006: 104, cited in Aubert, 2006, pp. 32). The international literature on customer education, show us of the importance of product usage and consumption (Aubert, 2006) both as an important research topic and as a key business issue for companies (Intrepid Learning Solutions (2010).

2.3. The Strategies of Customer Education

Customer Education is a program that instructs buyers of your products or services how to get the most benefit from their purchases. It may be a simple instructional guide or video and may also include online tutorials or documentation, advertising, personal selling, instruction manuals, package labels, press reports, cookbooks, consumer information services and toll-free hot-lines. The most effective customer education programs include a combination of those resources (Hoch and Deighton (1989); Aubert and Gotteland (2010) and Monnot (2010, cited in Volle 2012, pp. 31-32).

Using traditional media like 'professional advice, seminars, advertising, frequently asked questions, and booklets', new media like online videos and simulations, and information sharing with and among customers through blogs and forums and formal orientation programs or written literature to implement customer education (Dellande et al. (2004); Hibbert et al. (2012) and Suh et al., (2015).

2.4. Return on Investment expected through Customer Education Implementation

According to Eisingerich and Bell, (2006) customer education can improve client participation and loyalty. Wilson et al. (2012) argue that educated customers are aware of the subsequent actions they have to take, are more aware of firm expectations and customers can be educated to avoid peak demand periods and seek slow demand periods. Bell and Eisingerich (2007) add also that customer education can help customers achieve the full potential of their purchased products, it can solve various problems for customers, and it can lead to 'new or more sophisticated versions of the product over time'. According to Aubert (2006) and Challagalla et al. (2009), customer education increase customer satisfaction through proactive education is expected to enhance product. When customer education can be controlled internally and repeated, Firms themselves can improve their competitive advantages (Hoch and Deighton, 1989).

McNeal (1978) argue that customer education can satisfy and retain customers, create a favorable image of a product, brand or firm, and reduce confrontations with customers.

Last but not least, most organizations use customer education solutions to drive top-line growth (see table 1) and some organizations, while seeking growth, are also looking to reduce costs (see table 2) (Intrepid Learning Solutions, 2010).

Grow Revenue	
Increase product sales	**Generate training revenue**
• Increase brand awareness • Increase demand • Accelerate product adoption • Increase client loyalty • Gather client intelligence	• Drive standalone training sales • Bundle training with product

Table 1: Customer Education Grow Revenue
Source: Our own elaboration based on Intrepid Learning Solutions (2010)

Reduce Costs	
Reduce supports costs	**Reduce training costs**
• Reduce customer support calls by education customer • Enable communities to support each other • Enable partners to operate more consistently	• Decrease administration costs • Distribute informal content from the field • Reduce partners time to productivity

Table 2: Customer Education Reduce Costs
Source: Our own elaboration based on Intrepid Learning Solutions (2010)

2.5. Introduction to The "5 Ms" of Customer Education Model

But what and how to build an effective awareness/education program, and how can it be rolled out online and in person to the customers who need it most?

Through their client experience and independent research on the Customer Education topic, the Intrepid Learning Solutions Consultancy Group has defined five critical success factors to help organizations achieve success with their on line or a face to face educational marketing activity. These are shown below and modelled via the 5'M' (Make it easy, Make it relevant, Make it fresh, Manage it and Measure it) Customer Education in figure 1.
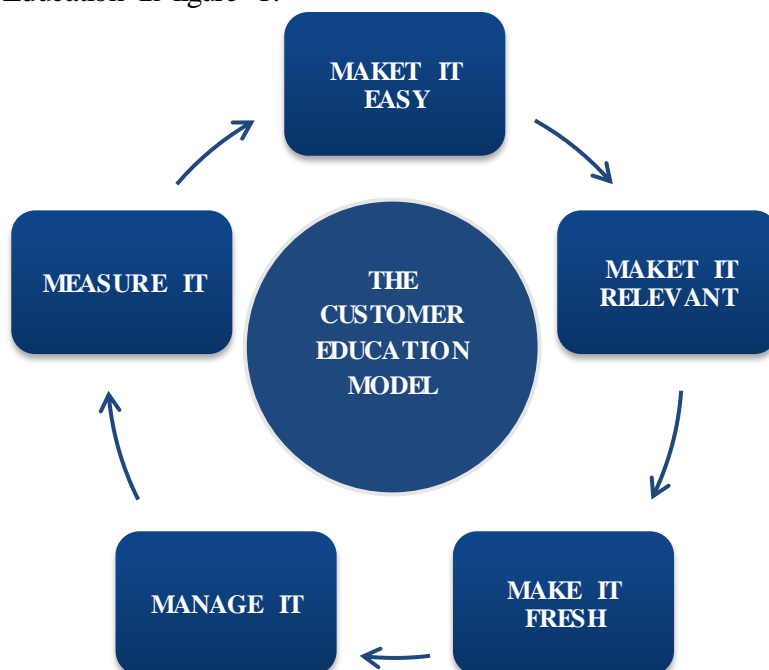

Figure 1: The 5 M's Customer Education Model
Source: Our own elaboration based on Intrepid Learning Solutions (2010)

Make It Easy (1): The centerpiece of any successful program is an interactive on face to face or website designed specifically for the targeted audience the company is seeking to reach. The Classroom environment (Young, 2005) or website's sophistication mirrors the organization's training and communications needs and budget (Intrepid Learning Solutions, 2010); Honebein and Cammarano (2011).

But regardless of those factors, the site, print and in-person components must have the appearance and usability of polished consumer websites (or classroom environment) that users are accustomed to visiting. It must cater to the needs of time-starved professionals to find and process information quickly.

Make It Relevant (2): A successful educational marketing solution also must include topics and formats that are customer-driven, covering not just how to use specific products, but also related topics that help customers achieve their fundamental goals and objectives that are driving them to consider your products and services. Savvy customers expect more to win their trust, (Bell and Eisingerich, 2007; Intrepid Learning Solutions, 2010).

Make It Fresh (3): Develop an education and awareness strategy that is regularly updated and improved by customer feedback because it's the right way to motivate people who tend to lose interest in Classroom environment (Young, 2005) or in web sites that don't provide a compelling reason for them to return. Companies need to post fresh educational content on a regular basis just as they do with other types of content, and be bold about retiring content that users rate lower or don't access frequently (Intrepid Learning Solutions, 2010) and (Ben Youssef et al., 2016).

Manage It (4): Behind the scenes, an effective educational marketing website or Classroom environment (Young, 2005) needs to capture critical customer information, such as what content your customers are viewing, how content preferences differ by type of learner, where and why customers might "bail" from your site. After capturing this type of usage data, you can then strategize new content and site improvements. More importantly, you can provide critical data regarding customer and prospect preferences to your colleagues in product development, sales and marketing functions. Users see a marketing-quality site, but the powerful database driving it feeds invaluable data customer information systems. It can also automate the way content is managed, providing alerts for content that needs to be updated or retired state Intrepid Learning Solutions (2010).

Measure It (5): Scorecards and dashboards make it easy for decision makers to see the impact of educational marketing (Intrepid Learning Solutions, 2010; Honebein and Cammarano 2011). As noted above, an educational marketing website can provide rich data that can provide keen insights to your customers' and prospects' interests and behaviors. Website analytics and content consumption data enable marketers to see the impact of customer education on product sales and gain macro-level information to focus marketing campaigns, (Intrepid Learning Solutions, 2010). In face to face, Classrooms featuring real-world active learning, providing clear learning goals, and emphasizing individual performance will enhance publics' perception of their perceived autonomy and competence and, thus, increase intrinsic motivation and use of self-regulation learning strategies argue (Young, 2005, pp.36).

The 5 M's Customer Education permit to a company's to ensure the success of their Customer Education programs with established goals, tied a strategy and a return on investment encrypted.

3. Methodology and Analysis

Qualitative research method with a case study approach was used to answer the research questions of this study. According to Flick (2009, pp. 21), qualitative research is an important research method and 'is oriented towards analyzing concrete cases in their temporal and local particularity and starting from people's expressions and activities in their local contexts'. Case study can be described as empirical research, where the phenomenon is examined in real life situation, in its own environment' state Yin (2003).

In this research, case study is used to describe or to explain the research object. According to Yin (2003), it can be differentiated between exploratory, explanatory, and descriptive case study approaches.

Exploratory case studies are often conducted to define research questions and hypotheses. Explanatory case studies seek to link an event with its effects and are suitable for investigating causality relations. Descriptive case studies are often used to illustrate events and their specific context. This study represents an exploratory attempt to analyzing Customer Education at SME in a B2D context.

3.1. Research design

This research refers to the case study of Oro Caffè, an Italian SME that provides coffee seminal. The research design is based on an in-depth interview with the marketing manager of Oro Caffè, and questionnaires with distributors of Oro Caffè's products. The questionnaires for the distributors aimed at providing insights into how important Oro Caffè's Customer Education implementation is for them, especially in light of their own business strategy. A total of seven questions have been addressed (see table 3)

1. For how long have you been a business partner of Oro Caffè?
2. Why do you buy products from Oro Caffè?
3. How important is Oro Caffè's investment in Customer Education School for you as one of his business partners?
4. How important is Customer Education School for your own business concept and commercial strategy?
5. What are the main reasons for your customers to buy your products?
6. Gender: ☐Male, ☐Female
7. Age of respondent …

Table 3: Questionnaire for the distributors of Oro Caffè
Source: Own elaboration

The in-depth interview with Oro Caffè's marketing manager aimed at analyzing the compagnie's marketing strategy through the customer education implementation. A total of 14 questions dealing with the topics the objectives and strategy of Customer Education projects and the expected benefits of Customer Education initiatives by organisations have been addressed (see table 4)

Topic	Questions
The goals and strategies of Customer Education	1. Could you describe in detail the concept of The Oro Caffè School? 2. Could you describe in detail how you would achieve the objectives and the benefits of your Customer Education program? 3. How do you describe specifically the strategies you will undertake to achieve the intended benefits? 4. We would like to get a description of customer differentiation as part of your Customer Education initiatives. 5. We would like to understand in detail how you go about personalization in your Customer Education program. 6. Could you please describe in detail how you interact with your customers according to the objectives and strategies of your Customer Education program?
The expected benefits of Customer Education initiatives by organizations	1. We would like to learn about the objectives and benefits of your Customer Education initiatives or programs. 2. Could you please describe specifically the main reasons why you decided to embark on your Customer Education program? 3. We would like to know in detail about the intended benefits that your organization was expected to derive from it when you first decided to embark on your Customer Education program. 4. Could you please tell us in your perspective some of the benefits you have seen so far? 5. With regards to the benefits of the Customer Education program, how do you describe increase in profitability? 6. How do you describe customer loyalty and retention when it comes to the expected benefits? 7. How would you describe revenue enhancement as one of the benefits of your Customer Education initiatives? 8. Can you please talk about cost savings and reduction as a benefit of your Customer Education initiatives?

Table 4: Questionnaire for the marketing manager of Oro Caffè
Source: Own elaboration

3.2. The case study Oro Caffè
3.2.1. Company history

The Oro Caffè trademark was created in 1972 as a place where coffee was served, consumed and enjoyed. Fifteen years later, Chiara and Stefano Toppano took over a small coffee roasting centre (no more than 60 m²) and decided to run it on their own: Stefano roasted with a small, 30-kg-capacity machine, and handled also the commercial side of the business. The new activity bore fruit at once and, from a mainly private clientele, they passed to serving, one after the other, a large number of bars. By continually improving their original recipe – the precious heirloom of the earlier coffee roasting centre - highly smart, sophisticated blends were perfected over time. What made Oro Caffè successful was a series of factors from the owners' direct involvement in carefully selecting raw coffee, to the use of high-tech, fully automated coffee roasting equipment: a mix guaranteeing high and consistent quality levels.

As time went by, their offer matched the demand, fully satisfying the consumers' changing requirements for a less aggressive, sweeter, velvety, palate-pleasing flavour. Starting in the 90s, distribution extended beyond national borders. The quality of Oro Caffè blends was at once appreciated, and exports to foreign countries became an increasingly important item in company turnover (http://www.orocaffe.com/en/About-us).

3.2.2. The Oro Caffè School

The Oro Caffè School was established in 2009 to offer professionals a thorough and adequate training regarding the culture and secrets of coffee. Nowadays, the Oro Caffè School is accessible to anybody wishing to attend our courses with intent being to spread knowledge of the world of coffee and to train an increasingly aware and careful consumer. To professionals in the catering industry the Oro Caffè School offer top training and updating opportunities on coffee, and on how to promote their own ventures; to those who are simply keen on the subject matter, instead, the chance to learn to appreciate and recognise quality coffee flavour and aromas.

In the classrooms, courses – intended for a limited number of people – are held by a team led by Giovanni Roitero, an expert coffee trainer and sector specialist, a professional barista who has been awarded the title "Maestro dell'Espresso" (= Espresso Master") and given the prestigious 'Patente di Assaggiatore di Caffè' (='Licensed Coffee Taster').

The syllabus goes from a historical outline on the origin of coffee to the study of its organoleptic features distinguishing Arabicas from Robustas. It also includes stints reserved to basics regarding the plant and the fruit, studying more about the various picking, processing, cleaning, selection and tasting procedures. After examining roasting processes, the practical stage begins, with the golden rules for getting the best from the blends: correct use of the machines, appropriate extraction times and full advice, and the secrets for being able to offer all the flavour and aroma of Italian quality espresso. A visit to the production plant – illustrating the processing cycles, from reception to roasting, from packaging right up to dispatch of the finished product – completes attendees' training path. The refreshments/coffee bar course, instead, provides tips to professionals about how to integrate their offer with original, coffee-based ideas: new drinks, cocktails and recipes.

The final objective is superior training, to get the most out of the Oro Caffè blends and, at the same time, improve offer types, while diversifying them in a creative way. Acknowledged and mentioned with distinction by the IIAC - the Istituto Internazionale Assaggiatori di Caffè (=International Coffee Tasters' Association) – the Oro Caffè School is today among the territory's most important schools offering complete and adequate training in the culture of coffee. (Source: http://www.orocaffe.com/en/ORO-Caffè-School).

4. Analysis of results

The first research question of this papers aims at understanding and describing objectives and strategies pursued by SMEs in the coffee sector.

Throughout the Oro Caffè study we get interesting suggestions.

According to Toppano (2016), the Oro Caffè School aims at educating barman (B2D), so they can provide customers with qualitative products and culture and knowledge about coffee.

In this way it is possible to spread the coffee culture and the ability to taste the product, that is not so simple and a lot of times customers are not able to distinguish between acidic or without sugar taste; in this way customers will be able to appreciate quality of their coffee.

In order to reach this objective the first educational course is delivered for free; this allows to communicate to barman both the program and know-how they can get by attending the following two fee-paying courses.

These courses differentiate barman only on the base of experience because they are not addressed to final customers.

The second research question consists in providing a description of the expected return on investment of Customer Education initiatives by these types of firms.

In the case of Oro Caffè main benefits were to increase the knowledge on qualitative coffee and associate to it the good reputation of Oro Caffè and both these benefits result effectively achieved.

With regard to the impact in terms of increase of profitability generated by the program of customer education, this is difficult to measure. Of course it has generated (Toppano, 2016):

-        a strong impact on reputation of the organization and this results in an annual increase of sells by 10%;

-        important benefits in terms of customer loyalty: 90% of customers who attends all their courses are very loyal towards the firm;

-        decrease of costs: after these courses Oro Caffè registers a reduction of assistance call by 15%. This is due thanks to a higher knowledge of equipment by barman.

These courses are considered very important by distributors that are commercial partners of Oro Caffè since few years (from few months to two years).

They purchase Oro Caffè products for five main reasons:

-        because their products are high-quality and very good products;
-        because the quality/price ration is optime;
-        because owners and employees of Oro Caffè are very kind and available;
-        for the seriousness of the firm;
-        for the quality of services offered.

At the same time they perceive the commitment of Oro Caffè towards educational program as very important and able to provide a very good level of education for people attending courses. They appreciate particularly the professionalism of the coffee trainer who is able to transmit his great passion for the coffee world. These programs allows participants to know better the product and valorizes the quality of products offered.

Also the frequency of the Oro Caffè School is considered very important because it allows barman:

-        to propose Oro Caffè products in a more suitable way;
-        to offer customers well-prepared coffees;
-        to devote much importance to quality and details.

In particular people attending courses identify these motivations at the base of the purchases of their customers:

-        preparation of coffee by competent and well-educated barman;
-        high quality of coffee;
-        passion in the preparation of coffee;
-        professional and organized barman;
-        innovative products.

This shows how distributors recognize Oro Caffè as a firm able to provide high quality/innovative products and a good education.

Starting from this consideration we can deduce that a 5 Ms Customer Education Model has been well developed by Oro Caffè. In fact, throughout an approach both theoretical and practical, its School

makes the learning easy for participants. This is possible also throughout visit to production plant with the illustration of the processing cycles (*make it easy*). Furthermore this School doesn't provide only a description of characteristics and origin of coffee but teach to barman also correct use of the machines, appropriate extraction times and secrets to prepare a very high-quality Italian coffee. These are all abilities very useful for participants (*make it relevant*); it communicates with its participants also by social media (facebook, twitter) and this make communication easy, informal and fast: in this way Oro Caffè can be always informed about new needs by participants (*make it fresh*). In addition, distributors perceive the importance of this school for several reasons and this means that the customer educational process is well-managed (*manage it*); finally, we can deduce starting from the replies of the Marketing Director that specific tools to measure return on investment exist given that he was able to cite specific information in term of increase of reputation, customer loyalty and decrease of costs (*measure it*).

5. Conclusions

The aim of this paper is to describe main objectives and strategies pursued by SMEs in the coffee sector and expected return on investment of their Customer Education initiatives.

First our results demonstrate that the main scope consists in increasing the culture of coffee and in educating barman in order to provide well-prepared product.

This emphasizes how the importance of product usage and consumption is well present in the strategies of Oro Caffè because the inability to use a product can prevent the exploitation of its potential (Best, 2005). Oro Caffè adopts also a strategy that allows to possible participants to try its courses by offering the first educational course for free.

The second research question aims at describing the expected return on investment of Customer Education initiatives. Results show how the main effects of this initiatives affect the loyalty that shows a relevant increase. This confirms what supported by Eisingerich and Bell, 2006. Furthermore, important effects are registered also in terms of reduction of costs: in fact, they develop a higher knowledge of products (Challagalla et al., 2009) and need less assistance; this result, as supported by Intrepid Learning Solutions (2010) in a reduction of costs.

Finally it is important to emphasize also an increase of reputation. This is get also thanks to the understanding by customers of the full potential of products (Bell and Eisingerich, 2007, p. 470), given that customer want to know what to expect (Bitner et al., 1994).

These attention of Oro Caffè to educational topics is perceived well by distributors that consider it very important for the delivering of a best product to their customers. In this way distributors seem to have clear the benefits that this kind of Schools can create and develop a better image of the firm.

Finally, the case of Oro Caffè seems to adapt well to the 5 Ms Model, achieving success with its on line or a face to face educational marketing activity.

6.   Managerial implications

Results of this study suggest important managerial implications.

First, users/customers don't always understand the full value of your product or service. In this case, educate them becomes an essential remedy to address this deficiency / Gap.

Second, through The School of Coffee, The Management refocused the entire company on helping Clients/Distributors get the extensive value product offered that they hadn't realized to date; and it revolutionized the customer experience and value.

Third, the School of Coffee is now perceived and valued as a marketing tool that provides ongoing value via customer insights. By educating its customers, Oro Caffè managed to achieve more frequent engagement for longer periods of time.

Finally, the attention shown by this firm toward educational programs is able to increase the reputation of the firm, so these kind of initiatives can be considered in programs of reinforcement of the brand.

7.   Limitations and future research recommendations

Despite the important contribution of this paper to the literature on customer education, it should be considered at the light of important limits.

It considers the analysis of a single case study, not allowing a comparison among different experiences of customer education initiative; second, it collects only the opinion of few distributors that have a partnership since few years.

Furthermore this paper doesn't link objectives and strategies pursued throughout customer education program to the return on investment achieved.

Starting from these limits future research could compare cases of success and unsuccess in order to learn something from the two types of cases.

In addition it should be interesting to measure effects created by these initiatives in terms of increasing of number of customers registered by distributors and relative returns.

Finally, the measure of correlation between the quality of these kind of courses and return generated could provide important suggestions also in the definition of strategies for firms delivering customer education initiatives.

So we can conclude with a slogan provided by the Intrepid Learning Solutions *"Educate your customers to make well-informed decisions. Impactful learning experiences across various stages of a customer's buying cycle lead not just to a sale, but to loyalty. Connect with your prospective customers by offering an innovative learning experience that helps guide them through the buying journey. Or build evangelists for your brand by offering product training at scale while also providing customers the opportunity to collaborate with internal subject matter experts. Because educated customers are loyal customers"*. (IntrepidLearning, 2016)

Acknowledgments

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