CUSTOMER LEARNING CLOUD IMPLEMENTATION GUIDE

This guide is designed to help you launch your customer-facing academy quickly—without turning setup into another full-time job.

Inside, you'll find a clear, step-by-step implementation path that breaks the process into small, manageable milestones. Each milestone includes a practical timeline and a focused set of key questions to help you design customer-friendly learning experiences that drive adoption and success.

The goal is simple: reduce complexity, respect your time, and empower your customers to confidently learn, adopt, and succeed—faster.

Timeline

Week 1	Week 2	Week 3	Week 4
Customer Learning Cloud Certification	Content Creation		Course Enrollments
Content Scope Planning	Settings		Launching your Academy
Contact Management	Integrations		Reporting & Analytics

Key Weekly Milestones

In this section, we break down the key week-to-week milestones you should complete to keep your implementation on track. Use the guiding questions and best practices to help you make decisions at each stage and ensure your team is setup for success.

Week 1: Prepared to Succeed!

Milestone	Key Questions	Best Practices
Content Scoping	• What content is critical to your initial launch? • Who will assist you with creating/migrating content?	• Use the scoping template to plan, visualize and assign content.
Content Collaboration	• Who should complete the Editor Essentials Course?	• This lesson provides a crash course in content creation and instructional design best practices.
Contact Management	• Which attributes are important for content enrollments, workflows and reporting?	• Think about the different contact fields you may want to use within WorkRamp.
	• Which custom registration fields do you want to create? • How will you segment these contacts based on these registration fields?	• Custom registration field data is gathered either through a registration process or via SSO. • Segmenting is a powerful way to organize your contacts and create tailored experiences.

Week 2-3: Configuration & Buildout

Milestone	Key Questions	Best Practices
Content Creation	• What learning experiences do you want to provide your contacts?	• Each content type has its own design and purpose when creating learning experiences. • Combining these content types can create powerful learning paths, collections and certifications.

Settings	• How do you want to brand your WorkRamp instance?	• WorkRamp provides many ways to customize theming, banners, colors and pages.
Integrations	• How will your contacts be added to WorkRamp? • How will they access your WorkRamp Academy?	• WorkRamp allows you to customize the registration experience. • We also have multiple methods for allowing contacts to access your academy: here
	• What additional applications in your tech stack do you want to integrate with WorkRamp? (i.e. Salesforce, Hubspot)	• WorkRamp can seamlessly connect to many applications and further tract contact learning performance.

Week 4: Launch & Reporting

Milestone	Key Questions	Best Practice
Course Enrollments	• What content do you plan on enrolling contacts in right away?	• Content can be assigned either manually or via workflows. • This course walks you through piloting content.
Launching your Academy	• How do you plan on announcing WorkRamp to your customers? • How do you plan on training new users to WorkRamp?	• The Introducing your academy provides communication plan examples and assets • Our template marketplace contains pre-built content to train and prepare.
Reporting & Analytics	• What learning outcomes are you most interested in tracking?	• Our AI Analytics Studio can assist you with creating reports based on your needs. • Quality Request = Quality Report

Supported Success

Technical Support	Weekly Implementation Office Hours	Slack Community	WorkRamp Academy
support@workramp.com	Register for Office Hours	New Admins contact support to be added	WorkRamp Academy

Contact Us

IM Team: workramp.getstarted@learningpool.com
https://academy.workramp.com/