LearnWorlds



2026 State of AI in Customer Education

Benchmarks, budgets & ROI from 270+ leaders

Listen to the key findings in 5 minutes

Table of contents

A word from LearnWorlds' CEO 3

Main takeaways 5

Insights from industry leaders 8

Methodology and demographics 10

Key findings 16

- AI adoption and ownership 17
- AI budgets and ROI 21
- Use cases and tools 25
- Risks and challenges 32
- Limitations and opportunities 39
- Emerging trends and future outlook 44

The way forward 51

- 1. Educate your team: AI literacy is now part of the job 53
- 2. Audit your workflows: See where AI is already appearing 55
- 3. Build guardrails: Protect tone, trust, and learners 57
- 4. Start small, but start as soon as possible 59

How LearnWorlds supports customer education 61

Section 1

A word from LearnWorlds' CEO

A word from LearnWorlds' CEO

AI has moved from "interesting demo" to everyday tool in customer education. The leaders we spoke with describe real momentum: AI is speeding first drafts, transcript clean-ups, repurposing, translations, and routine updates, so teams can focus on the parts of the craft that actually drive outcomes.

Two things can be true at once. AI accelerates production by default; excellence still requires intent and human judgment. If your system is strong, AI amplifies it. If your system is weak, AI exposes it. The programs we see pulling ahead treat AI as infrastructure, not novelty. They name an owner, set simple guardrails for quality and privacy, and wire learning closer to product signals so help arrives "just in time," not just in a catalog.

You'll see that pragmatism throughout this report. Budgets are rising, experiments are paying off on reasonable timelines, and teams are learning how to keep the human voice at the center. The gaps are clear too (skills, ownership, data plumbing) and they're solvable with process, not magic.

Why we're publishing this. LearnWorlds sits at the intersection of product and learning for thousands of teams around the world. With that vantage point comes a responsibility: separate signal from noise, benchmark where teams actually are, and share the practices that are delivering outcomes right now.

Our point of view. AI buys back time for instructional design and the human touches that make learning stick. That's the philosophy behind our platform. In essence, we're building a Learning Operating System: assistive AI that speeds creation and upkeep; a model that makes content structured, composable, and reusable; built-in pedagogy, guardrails and review to keep standards high; and analytics wired to adoption and retention.

If you're ready to turn experiments into an operating model, we'd love to compare notes. I hope the insights here save you months of trial and error, and help you build deeper, more human learning experiences at scale.





Panos Siozos,
PhD Co-Founder & CEO @ LearnWorlds

Section 2

Main takeaways

Main takeaways

1.

AI adoption is uneven and deeply contextual
AI is already reshaping customer education, but not in a single, uniform way. Insights from 274 CE professionals and 12 in-depth interviews show a landscape defined by uneven, contextual adoption rather than a neat "state of AI."

2.

A clear maturity gap is emerging
Around 60% of teams are still in "pre-production" mode, either not using AI, planning to adopt it, or experimenting in isolated pockets. Meanwhile, 37% say AI is in pilots, embedded into some workflows, or core to most initiatives. This more advanced group treats AI as infrastructure that supports how content is created, maintained, and delivered.

3.

AI is entering through grassroots experimentation, ownership remains muddy
More than a third of respondents say their first AI initiative started through grassroots experimentation, not a leadership directive. At the same time, 42.5% report no clear owner for AI strategy in CE. This mix of high practitioner energy and low structural clarity explains why many teams remain stuck between promising pilots and scalable practice.

4.

Budgets and expectations are rising faster than systems
AI spend is still modest (median ~$1,000/year), yet nearly half expect this to increase. Most anticipate tangible ROI within 12 months, over a third expect it in under six. But a significant portion don't know when AI will pay off or what their future budget will be.

5.

AI is already woven into everyday content workflows
A majority of CE teams say AI now supports up to a quarter of new content, and more than a quarter report AI assisting over 25% of educational content. ChatGPT dominates (82%), with tools like Gemini, Claude, Perplexity, Synthesia, HeyGen, Clueso, and ElevenLabs forming a second wave of specialized capabilities.

6.

The biggest wins are happening early in the content lifecycle

AI is most commonly used for text generation, course outlines, transcript cleanup, and repurposing existing materials. For now, it carries the weight of drafting and maintenance so humans can focus on instructional design and customer relationships.

7.

Risks and quality concerns are significant

Nearly half worry about quality and accuracy; around a third fear losing the human touch. Others highlight data privacy, job security, over-reliance, and erosion of critical thinking. Most CE professionals rate AI content a "3 out of 5." It makes it easier to create more content, but not necessarily better content. Creation time goes down, review time goes up. Quality still lives and dies with human taste.

8.

Skills and systems are lagging behind ambition

More than half say there is no formal plan to improve AI literacy in their team by 2026. Many turn to external specialists rather than building internal capability. Meanwhile, fragmented tech stacks (LMS, product analytics, support, community, and AI tools) stitched together with brittle integrations and manual exports, limit AI's ability to do more than act as a very fast copy editor.

9.

Teams are prioritizing more contextual, in-product learning

Trigger-based and just-in-time learning are becoming a priority. Teams are exploring ways to surface the right content exactly when a customer needs it, often inside the product. There is also growing interest in using AI to turn data (usage, behavior, support queries) into actionable signals and shorten the time between what's happening in the product and how education responds.

10.

Roles are evolving as AI becomes part of the backbone of CE

As content creation becomes faster and more automated, human roles shift upstream, toward strategy, data interpretation, and experience design. Teams are thinking less about individual courses and more about the broader learning experience. AI enables teams to double down on the things only humans can do: define quality, create meaning, and build relationships.

Section 3

Insights from industry leaders

Insights from industry leaders

This research was shaped by customer education professionals who generously shared their time and experience. Thank you for helping the community see what to prioritize next.

We're particularly grateful to the ones who agreed to be interviewed:



Alisa Dubik
Customer Education Manager @ Gorgias



Antony Leeming
Head of Customer Education @ Beyond Now



Danielle Evans
Director of Customer Education @ Sendoso



Dave Derington
Sr. Manager – Learning Solutions & Programs @ Atlassian



Eric Mistry
AI & Automation Transformation Lead @ Zapier & Writer of CED Bi-Weekly



Kristine Kukich
Owner @ kristinekukich.com



Luke Marlowe
Customer Education Manager @ Beacon



Mike O'Brien
Founder @ Assisting Intelligence



Roberto Aiello
Sr. Learning Experience Designer @ Personio



Sabrina Relevy
Product Education Manager @ Nayax



Stuart Watson
Product Manager @ Projectworks



Thomas Edwards
Customer Education Rep @ Crossbeam

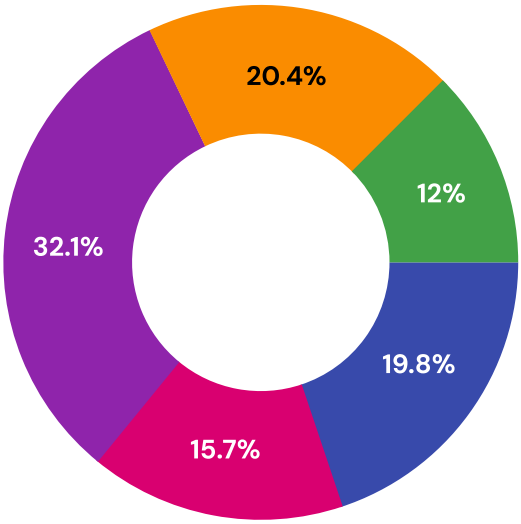
Section 4

Methodology & demographics

Methodology & demographics

This report draws on both quantitative and qualitative data. We surveyed **274 professionals** during September and October 2025, representing roles across customer education, instructional design, L&D, and enablement, to understand AI adoption, use cases, tools, risks, and future expectations.

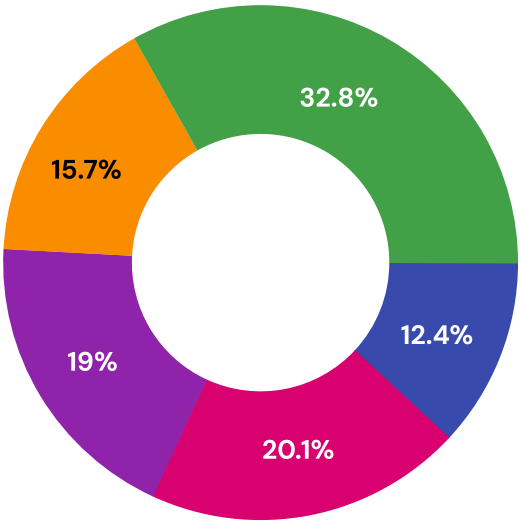
We also conducted interviews with **12 CE leaders and consultants** from companies such as Zapier, Atlassian, Personio, Sendoso, and Gorgias, which provided deeper context on how teams are putting AI into practice.



Job titles and functions

A total of **32.1% of respondents were CEOs or founders** and **20.4% come from dedicated CE teams**. A relatively high **participation of L&D professionals (15.7%)** points to the overlap between internal and external training efforts.

- CEO / Founder
- Customer Education
- Other (Marketing, Product, CX, Enablement)
- L&D
- Customer Success



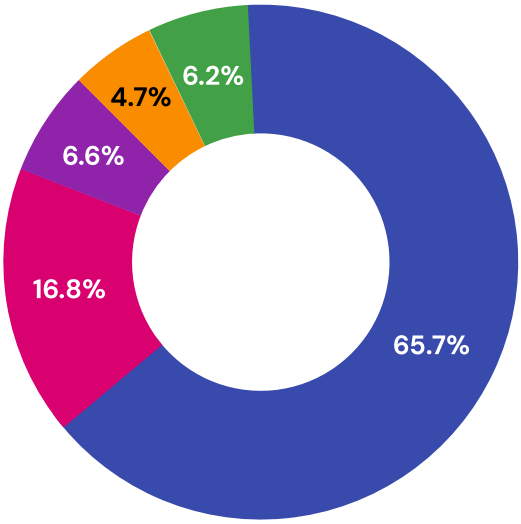
Level of experience

One in three respondents (32.8%) have more than a decade of experience in customer education, which adds weight to the insights shared throughout this report. A mix of experience gave us a wide lens into how AI is shaping customer education today.

- < 1 year
- 1-3 years
- 4-6 years
- 7-10 years
- 10+ years

Geography

Respondents came from all over the world, with the majority based in **North America (41.7%)** and **EMEA (36.1%)**. Together, these two regions make up nearly 80% of the dataset. **APAC accounts for 15.3%, and LATAM makes up 6.9%**.



Company size

Nearly 66% of respondents work at companies with fewer than 100 employees. The rest are distributed across a range of company sizes. This distribution reflects a strong representation of smaller teams, with meaningful input from mid-sized and enterprise organizations.

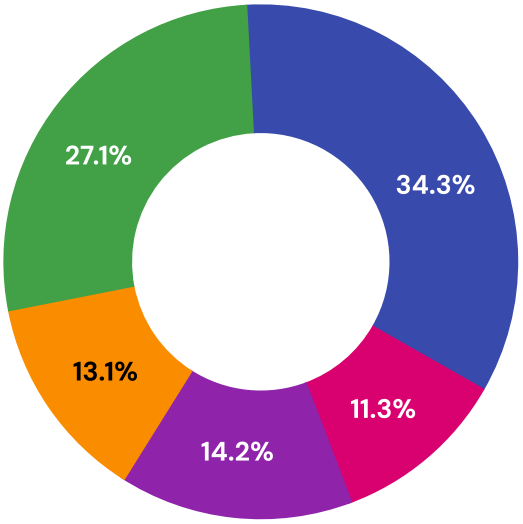
- 1-99
- 100-499
- 500-999
- 1000-4999
- 5000+

Annual revenue

Over half of respondents (52%) work at companies with annual revenue under $1 million. Beyond that, 11% fall into the $1M-$10M range, and 13% into $10M-$50M. The remaining 24% represent companies across higher revenue bands, including $50M to over $1B.

Industry breakdown

Respondents came from a wide range of industries, with **SaaS and tech companies representing the largest group (39.4%)**. Business and marketing services followed **at 16.8%**, with additional representation from healthcare (7.7%), education (5.8%), retail (3.6%), manufacturing (2.2%), and other sectors like nonprofit, consulting, finance, and e-learning (24.5%).



Maturity level

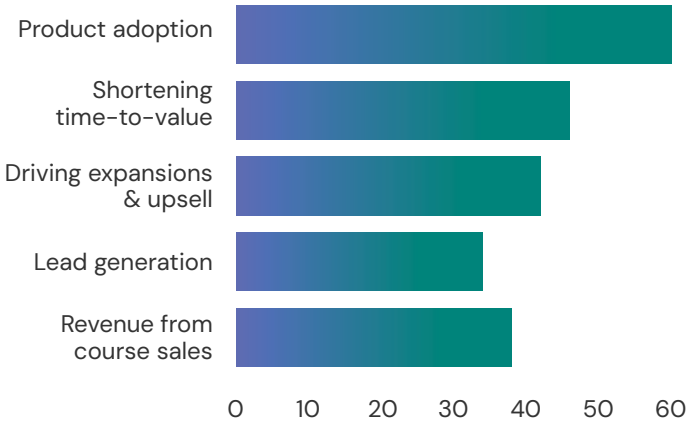
A third of respondents are just getting started, with 34.3% reporting their customer education program is **less than six months old**. Almost a third have programs older than 5 years.

Top customer education goals

Survey results show that **customer education is closely tied to product-led growth**.

Nearly 60% of respondents cite **product adoption as a top business goal**. Shortening time-to-value (46%) and driving expansion or upsell (42%) also rank high.

These are clear signs that education is being used as a growth lever. Reducing support costs and generating revenue from course sales follow closely, while lead generation trails slightly behind.



> **"Product activation is a great success metric in customer education. We realigned our core learning path with activation milestones and track a helpfulness score consistently above 94%, reflecting how confident customers feel after training."**



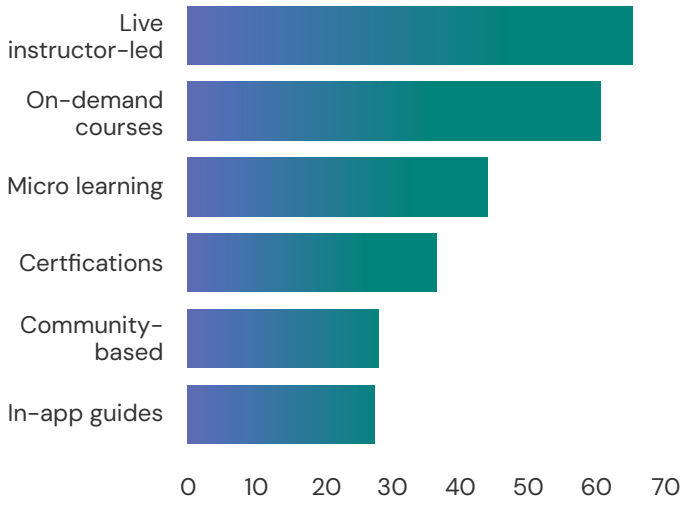
Roberto Aiello
Sr. Learning Experience Designer @ Personio

Learning delivery formats

Customer education is still very course-centric. Almost two-thirds of teams are running **live instructor-led sessions (64.6%)**, and **on-demand courses (60.9%)** are right behind.

That tells us **most programs are still built around classic "come to the course"** moments rather than always-on, in-product learning. AI is being layered onto this model, but the underlying formats still look a lot like they did five or ten years ago.

The next tier includes **micro-learning (43.8%) and certifications (35.8%)**, and this shows where teams are trying to modernize without fully changing the delivery model. Micro-lessons and credentialed paths are attempts to make content more snackable and more valuable for the learner.



> **"Most of my videos and articles are short, between 40 seconds to a minute and a half, real micro-bites of information. The goal is simple: knowledge should be easy to access and quick to configure. AI has helped make that content even more digestible."**



Sabrina Relevy
Product Education Manager @ Nayax

This is where many orgs are experimenting with AI for faster scripting, repurposing, and assessment generation, rather than rethinking the learning journey itself.

Less than a third of respondents are using **community-based formats (28.5%) or in-app guides (28.1%)**. Those are the channels leading customer education professionals keep pointing to when they talk about "learning in the flow of work," contextual prompts, and AI-driven assistants.

Data shows that the formats best suited for adaptive, AI-powered support are still underused. Most teams are upgrading their content with AI while **the delivery model is lagging behind**. This sentiment has been confirmed across several conversations we had with CE professionals.

> **"The traditional customer education model with certifications, microlearning, long-form courses, might not be the future. With AI and point-of-need learning, what learners really need is a 20-second TikTok-style video, or just a well-timed tooltip. I think the future is in live, in-app tutoring and contextual help, not long certification paths."**

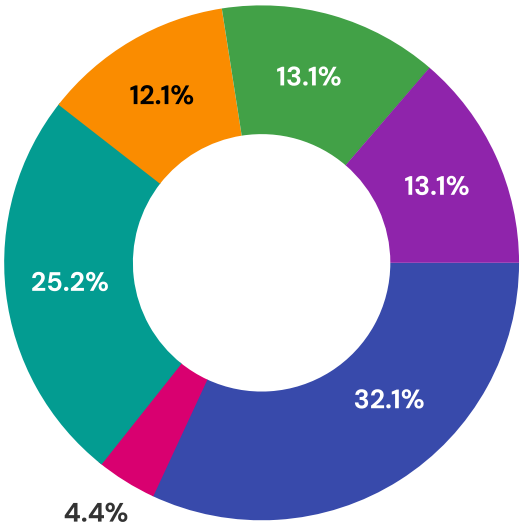


Antony Leeming
Head of Customer Education @ Beyond Now

Section 5

Key findings

AI adoption and ownership



Not everyone's moving at the same pace

When we look at how teams describe their current use of AI in customer education, a clear **split in maturity levels appears**.

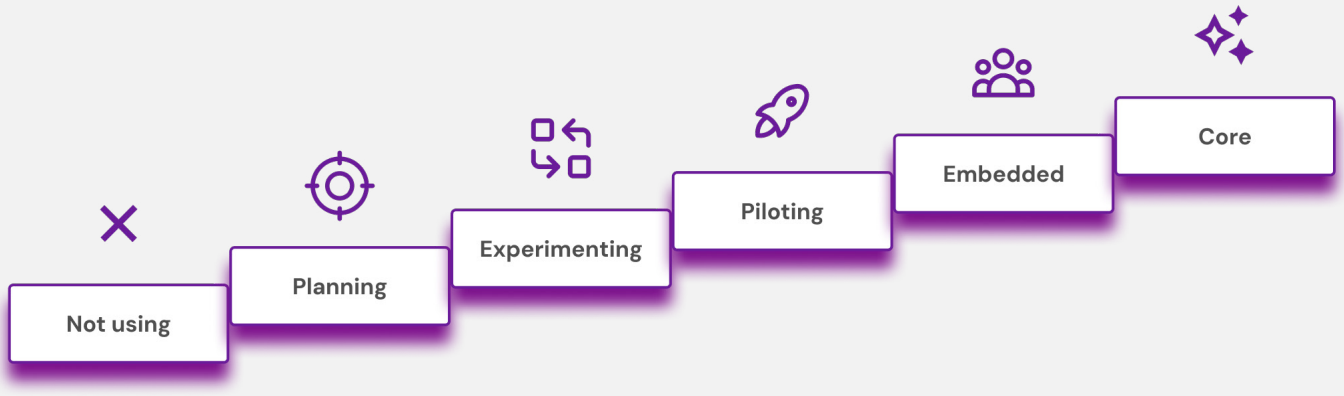
Around one in three respondents say they're experimenting (32.1%), with another 13.1% not using AI at all and 13.1% only planning to adopt it in the next 6-12 months.

That's almost **60% of teams still in "pre-production" mode**, either curiously testing AI or still not using it. In any case, AI is not yet something their workflows depend on.

- Experimenting
- Limited pilots
- Embedded in some workflows
- Core to most workflows
- Not using
- Planning to adopt in 6-12 months

On the other side, a smaller but meaningful group is already building AI into the fabric of their programs. **A combined 37% report** that AI is in limited pilots (4.4%), embedded into some workflows (25.2%), or core to most initiatives (12.1%). For them, AI is closer to infrastructure than experiment.

Put together, the data sketches a maturity path that looks like this:



Most organizations are clustered on the left side. A smaller group has already moved to the right and is compounding advantages in increased speed and consistency and better learner experience.

Each step usually reflects a shift in ownership and measurement. Experiments live in personal workflows; pilots are socialized across a team; embedded use has documented processes; "core" means the program would genuinely feel slower or weaker without AI.

For anyone leading customer education, the key question becomes: ***Where are we on this pathway, and what's the smallest, meaningful step we can take to move forward?***

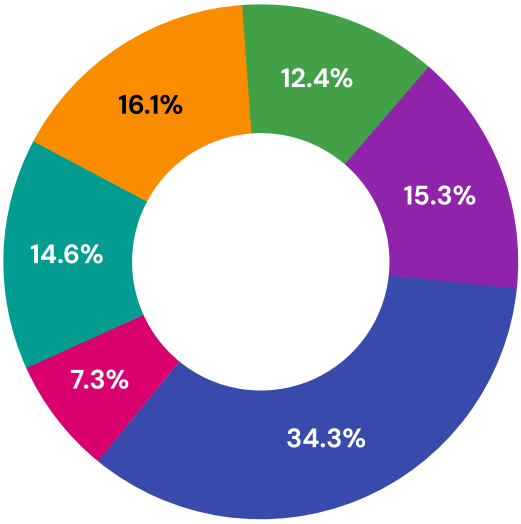
In most cases, it starts with choosing one use case where AI already works—course outlines, transcript cleanup, draft assessments, video updates—and turning that from "something a few people try" into a standard, owned, measured workflow.

Once a team sees that AI can reliably save time and maintain quality in one area, it becomes much easier to extend that pattern to the rest of the learning ecosystem.

"Start simple and solve a real problem. If you're stuck explaining a tricky concept, ask AI for help. You might not get a perfect answer, but it'll spark ideas. Even as a team of one, having AI as a sounding board gives you fresh perspectives and saves time. Once you're comfortable, you can move on to more complex tasks, like asking it to review a lesson for clarity or engagement. It cannot replace a colleague, but it's a really effective thinking partner."



Luke Marlowe
Customer Education Manager @ Beacon

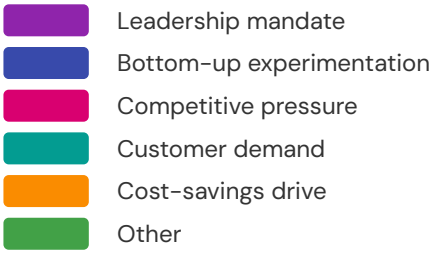


Grassroots experimentation over top-down mandates

When we asked what sparked the first AI initiative in customer education, the answers pointed strongly to people closest to hands-on work.

More than a third of respondents (34.3%) said their AI journey started with bottom-up experimentation: practitioners were the ones opening tools, writing prompts, and testing use cases long before there was a formal strategy.

This points to high curiosity on the ground and a clear **shift toward learning by doing** rather than waiting for perfect alignment or an approved roadmap.



Alongside that, **16.1% credited cost-savings** as the initial trigger and **7.3% pointed to competitive pressure**.

Teams are looking for ways to support more customers without adding headcount, or they have seen competitors use AI to speed up onboarding, personalize learning, or automate content creation and don't want to fall behind.

> **"We could see all our competitors launching 'AI-first' or 'AI-enabled' products. It used to be a delighter, now it's an expectation. So we felt we had to start using it ourselves. Otherwise, how could we understand how to build it into our own product?"**



Stuart Watson
Product Manager @ Projectworks

Even though cost-savings were listed as the initial spark, we discovered that **more than a half of respondents within this group (56.6%) are not pulling back on AI**. On the contrary, they are planning to increase AI spend.

A total of 15.3% said their first AI initiative came from a leadership mandate. AI is clearly on the minds of executives, but in customer education, it is often practitioners who move first.

There is also a **group of 12.4% respondents that listed "Other"** as a reason they tried AI for the first time, with additional answers like "faster course design," "exploring the opportunities," "reducing training creation time."

Sometimes it's a combination of factors that sparked their first use of AI, for example "experimentation and time saving."

It's interesting to note that within this group, some are exploring AI primarily as a way to "automate workflows," "break creative blocks," and even "improve accessibility for students with impaired hearing." This tells us a lot about the emerging use cases of AI and the curiosity to discover how to make the most of it.

> **"When ChatGPT-3 came out, leadership did the best thing they could: they encouraged us but also got out of the way. They said, 'Experiment, learn, but be mindful.' That permission to play was crucial. It allowed me to spend work hours learning prompt engineering, researching, and then helping the team upskill."**



Eric Mistry
AI & Automation Transformation Lead @ Zapier
& Writer of CED Bi-Weekly

Who actually owns AI in customer education?

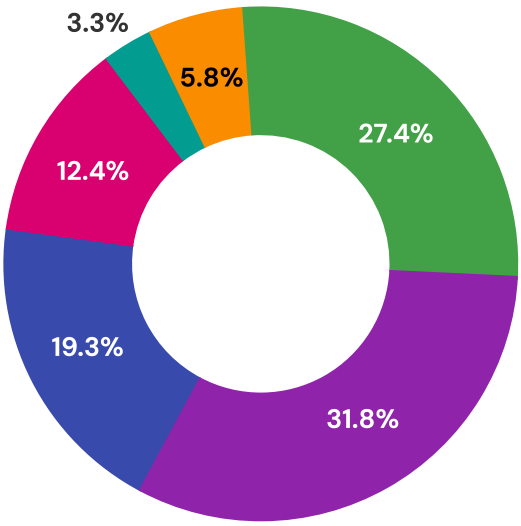
When we asked who owns AI strategy for customer education, the most common answer was: no one.

A total of **42.5% of respondents say there is no single owner**, while **24.5% say it clearly sits within the customer education** team. The rest is scattered across IT, data, L&D, or "shared" between functions, which usually means AI lives in pockets and depends on who is most enthusiastic rather than on a clear plan.

That helps explain why many teams get stuck in pilot mode. Experiments happen, but without a single owner, it is hard to decide which use cases to scale, how to govern quality, or how to connect AI work back to business goals.

When no one clearly owns AI in customer education, no one fully owns the guardrails, the standards for quality, or the connection to business outcomes. You end up with powerful tools, uneven skills, rising expectations, and no single place where strategy, governance, and experimentation come together.

AI budgets and ROI

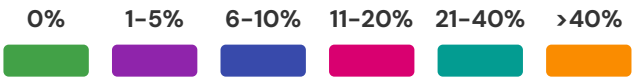


Small budgets, big expectations

Right now, most customer education teams are **treating AI as a supplementary investment** rather than a core part of their operating model. Almost a third of respondents (31.8%) allocate just 1-5% of their CE budget to AI, and another 19.3% sit in the 6-10% band.

When adding the **27.4% of teams with no AI spend**, AI appears in many budgets but remains a relatively small component.

Percentage of the customer education budget allocated to AI



The small minority investing double-digit percentages are the real outliers. **Roughly 12.4% allocate 11-20%**, with only a few going beyond 20%.

Those are typically the teams using AI to maintain constantly changing content, automate video updates, build internal assistants, or plug directly into product and support data.

In these orgs, **AI spend is starting to look less like "tools" and more like infrastructure** for how educational programs get built and delivered.

Spend is still quite modest

A total of 105 respondents shared their current AI budgets. The numbers reveal a highly uneven and early-stage investment landscape.

While the **average budget appears close to $9,000 per year**, the **median of just $1,000** tells the real story. Most teams are still experimenting modestly, allocating minimal funds for pilot projects or subscriptions to AI tools rather than structured programs.

A small cluster of respondents, those within and above the **$20,000–$50,000 range**, significantly skews the average upward. These are **mature organizations and enterprise education teams** that are actively operationalizing AI by integrating it into learning platforms, automating workflows, or developing proprietary models.

Most are still in "toe in the water" mode. They're spending just enough to experiment, but not enough to redesign workflows, roles, and measurement around AI. A smaller segment (often larger or more mature organizations) is making structured, higher-level investments.

This suggests less a clear "maturity divide" than a two-speed landscape: many teams are still testing, while a few are operationalizing AI at scale.

That **gap between ambition and allocation** explains a lot of what shows up elsewhere in the survey and what we discovered through interviews. Ownership is often fuzzy, upskilling is not formalized, ROI hard to prove, and there's widespread uncertainty about generative AI's quality of output.

> **"Sometimes you might be asked to justify your existence: 'Do we really need a customer academy?' My answer lately is more of a thought experiment—if you're not sure, try pausing it for a few months and see what happens. The impact tends to speak for itself."**



Roberto Aiello
Sr. Learning Experience Designer @ Personio

AI budgets will mostly rise in 2026

In our data, **nearly half of respondents (48.1%)** expect their AI spend on customer education to increase next year.

Momentum is clearly moving toward more investment, but a **third of teams are still in "wait and see" mode**, often because ownership, planning, or ROI are not fully defined.

At the same time, **a large share of respondents (33.6%) are still unsure about next year's AI budget**, which again hints at unresolved questions around ownership and ROI. People feel the impact in their day to day, but they do not always have clean dashboards or attribution models to back it up.

Alisa Dubik from Gorgias mentioned how her position is unique because she works for an "AI-first" company where the leadership is very supportive, even when numbers feel out of reach. This tells us a lot about the importance of creating a culture where experimentation is welcome.

> **"We did a deep dive with our analytics team on one product feature. The two touchpoints with the highest conversion rates were the academy course and the help center documentation. So we know it works. But pinpointing the exact moment of impact is hard."**



Alisa Dubik
Customer Education Manager @ Gorgias

Additionally, impact and ROI are not always straightforward, shared **Luke Marlowe from Beacon**:

> **"I'd love to be able to say, 'We released this article on this date, and in the next two months support requests dropped by X%.' But it's not that straightforward. When you publish something new, people often go and try the feature for the first time, which can actually increase the number of questions that come in. So it's not always clear whether new content is reducing or increasing support load. That's the tricky part of measuring the real impact."**



Luke Marlowe
Customer Education Manager @ Beacon

Budget increases are a signal that teams are feeling that impact already. The next step is helping them translate that feeling into a clearer, shared business case.

Expected pay off in 6-12 months

More than a third of respondents are betting on fast results, with **35% expecting their AI investments in customer education** to pay off in under six months. If you widen the lens to a full year, that number jumps to **58.4% who expect positive ROI within 12 months**.

That is a big signal that teams are not treating AI as a distant innovation project. They expect it to show up in real numbers, inside the current planning cycle.

At the same time, **24.1% say they are not sure when AI will pay off**. For almost a quarter of respondents, AI still feels hard to measure due to immature reporting, fragmented data, and a skills gap around what to track and how to connect it to business outcomes.

Again, people feel that AI is helping, but they cannot always prove it in a way that convinces finance or leadership. Some teams are already closing that gap by grounding ROI in simple, concrete metrics.

> "We've been tracking how often customers go through our digital resources. Every time they take a course or watch a video, that's time a CSM doesn't have to spend on Zoom. Internal time saved is a core metric for us."



Danielle Evans
Director of Customer Education @ Sendoso

The more teams communicate impact, even if it's on an anecdotal level, the easier it becomes to justify further investment and move AI from experiment to essential infrastructure.

It's important to keep in mind that ROI hides in the cumulative impact, as shared by **Eric Mistry from Zapier**:

> "We tend to overestimate what AI can do in a month and underestimate what it can do in a year. Once people build the muscle, the payoff is exponential. If every employee in a 500-person company saves just ten minutes a day with AI, that's a massive gain."



Eric Mistry
AI & Automation Transformation Lead @ Zapier & Writer of CED Bi-Weekly

Use cases and tools

The majority of today's educational content is AI-assisted

Most customer education teams are no longer asking if they should use AI. They're deciding how much of their work it should touch. **Just over half (52.2%)** say that AI helps create up to a quarter of their new content.

Unsurprisingly, AI is doing a lot of repeatable, scalable work. From drafting outlines, turning rough notes into first drafts, and repurposing webinars into lessons to converting documentation into training scripts or generating multilingual variants. **But humans still own the shape of the learning experience** and the final quality bar.

This shift frees teams to spend more time where their expertise matters most, which includes instructional design and implementing learner feedback. Instead of burning hours on blank-page work, they can iterate on structure, refine messaging, and test what actually moves activation, adoption, and retention.

AI is becoming the default helper in getting content to a "good enough to refine" stage, which makes it possible to scale education programs without simply asking humans to work longer or produce more.

> **"Over 75% of our content is AI-assisted, even if it's just for copy editing. AI is there, helping us polish and optimize, not fully replacing the human part. I would never just trust it to independently create the content I need. "**



Alisa Dubik
Customer Education Manager @ Gorgias

AI is mostly used at the beginning of the content lifecycle

Right now, most AI in customer education still lives at the **"busywork" end** of the spectrum. When we asked which use cases are making the biggest difference, **62.4%** of respondents pointed to **text generation and 52.2%** to **course outline creation**.

You can map current AI usage into three tiers.

1. AI for busywork

This is where most teams are operating today. AI helps with editing, scripting, repurposing, translation, and transcription. It's all the small, repetitive tasks that slow down production, as shared by **Eric Mistry from Zapier**:

> **"AI has made me hyperproductive. It takes care of the small, repetitive stuff such as scheduling, meeting notes, follow-ups, so I can focus on thinking and strategy. Robots can manage to-do lists, but they can't create meaningful content without guidance."**



Eric Mistry
AI & Automation Transformation Lead @ Zapier & Writer of CED Bi-Weekly

The 30.3% using AI to speed up **video creation** and the 24.1% relying on it for **automatic transcripts** are a good example. AI cleans up audio, generates captions, and turns a single asset into multiple formats.

Danielle Evans, Director of Customer Education @ Sendoso, shared how valuable AI is for automatic content updates:

> **"We had over 50 product training videos and 15-30 product releases per year. Updating them manually would basically be a full-time job. We are now using an AI tool which actually tags to the code behind the product. When something changes, we just rerender it and the video updates everywhere. That's a huge time and cost saver."**



Danielle Evans
Director of Customer Education @ Sendoso

2. AI for experience design

A second group is starting to use AI not just to produce content faster, but to **shape the learning experience** itself. Course outline generation sits right on that line.

Instead of manually mapping modules and flows, **teams generate a first pass and then refine** based on pedagogical principles and business goals.

The potential is huge, but it should be approached with care, shared **Dave Derington, Sr. Manager – Learning Solutions & Programs @ Atlassian**:

> **"There's so much potential here for instructional designers. I once helped a client build an entire university in under three months using AI. We audited what content they already had, uploaded recordings and notes, and prompted ChatGPT to act as a learning designer and build a curriculum around these topics. What came out was a strong first draft. Then we as experts came in to polish it and recognize its weak points."**



Dave Derington
Sr. Manager – Learning Solutions & Programs @ Atlassian

Dave continued to share how useful tools like Google's Notebook LM are for structuring a class or even an entire course. He's been able to use that personally with his clients, then spend his time working with subject matter experts to spot areas that need to be updated, clarified, expanded upon.

Tools like **voice-over dubbing (16.4%)** and **AI avatars (11.7%)** are early signals of experiments in making content more scalable, multilingual, and consistent without multiplying production overhead.

3. AI for strategic enablement

The third tier is still emerging, but it's where the real transformation lies. **Adaptive learning, personalized agents, and in-product guidance** that respond to what learners actually do, not just who they are.

Sabrina Relevy, Product Education Manager @ Nayax, shared an exciting direction her company is heading in:

> **"Our VP is pioneering a bold AI vision for 2026: role-based LLMs that empower every team with intelligent, job-specific assistants. It's a future we're excited to build. We're creating super agents and soon, avatars that speak like us, guide users seamlessly, and feel like a true companion on their journey. It's a fascinating leap into the future of human-AI collaboration."**



Sabrina Relevy
Product Education Manager @ Nayax

This is also where AI moves from "content helper" to "enablement layer," connecting usage data, support trends, and learner behavior to **trigger the right help, at the right moment, in the right format**.

Very few teams are here yet, but you can see the shift in the way people talk about AI-powered coaches, role-based assistants, and embedded, point-of-need learning. **Dave Derington** calls it "the holy grail of customer education":

> **"This is where, as an industry, we need to invest our time. We need to break content into bite-sized pieces, index it, flag it, and build the right LLM around it. It sounds complex, even a little intimidating, but that's the real task ahead. Because if AI can safely and responsibly connect all those dots, and help customers in the exact moment they need support, guiding them toward their desired outcome faster... That's true customer success. That's learning at scale, in the moment, deeply personal."**



Dave Derington
Sr. Manager – Learning Solutions & Programs @ Atlassian

Seen through this lens, today's dominant use cases (text generation, outlines, transcripts) aren't the end state. On the contrary, they're just the most common entry point.

Teams are using AI to clear the busywork first so they can free up the human time and headspace needed for the harder shift, which is designing learning ecosystems where AI significantly improves learning for customers.

ChatGPT and generative AI tools are still dominating

A total of 146 respondents filled in an open-ended question about the AI tools they're using. **With a total of 82% respondents reporting ChatGPT use**, it has clearly become the gateway tool for AI in customer education. Its dominance reflects in its accessibility and versatility, and the fact it pioneered generative AI. It's the easiest place for educators to start experimenting.

ChatGPT has lowered the barrier to entry, allowing non-technical educators to integrate generative AI into everyday tasks. What was once a niche skill is becoming baseline digital literacy in the field.

The next cluster of tools includes **Gemini (24%), Claude (19%), Perplexity (8%), and Copilot (7%)**. Educators are starting to curate their own AI stack depending on the task. For example, Gemini has been praised for factual reliability, Claude for nuanced tone and reasoning, and Perplexity for research or fact-checking. This trend points to growing AI literacy and maturity in the customer education space.

Particularly in the case of generative AI, the value users get depends on 1) the tool itself and 2) their prompt engineering skills.

> **"I ran the exact same prompt in Gemini and ChatGPT. Gemini said it couldn't export to Google Sheets, which was surprising for a Google tool. It could only do Excel. That made me realize: not all tools are created equal, even though the capabilities might seem the same on the surface."**



Danielle Evans
Director of Customer Education @ Sendoso

Kristine Kukich, business owner and consultant working in customer education, shared how having a clear framework helps with choosing the right tools:

> **"Tool selection should start with your context. What's your workflow, what are your gaps, and how will this tool integrate? Too often, people chase the latest shiny thing instead of evaluating whether it fits their existing systems and goals. That's where structured frameworks really help."**



Kristine Kukich
Owner @ kristinekukich.com

Apart from generative AI tools, the growing appearance of tools such as **HeyGen, Synthesia, ElevenLabs, Clueso, Canva, Descript, Gamma**, and **Grok** points to an expanding creative toolkit in customer education.

AI is now being used not just to write text, but to speak on behalf of instructors, to illustrate a point, and to polish raw video footage in minutes.

Educators are experimenting with AI-generated video, voiceovers, and dynamic visuals, indicating a shift from text-heavy courses to **multimodal, media-rich learning experiences**.

> **"Video creation is where AI shines the most. With tools like Clueso, I can record, narrate, and have a nearly flawless video ready in minutes. As someone who used to spend hours editing, it's mind-blowing how much time that saves."**



Eric Mistry
AI & Automation Transformation Lead @ Zapier & Writer of CED Bi-Weekly

Risks and challenges

Limited budgets, missing skills, and disconnected tools as main blockers

Nearly half of all customer education teams (46.7%) point to **budget** as their top blocker. For many, AI is still a budget line item that's competing with core production costs. Smaller programs, especially, are caught between wanting to scale with AI and proving its value before they can fund it properly.

Right behind budget, **tool integration (44.5%)** and **skill gaps (44.2%)** reveal where progress slows. Most teams already use multiple systems (LMSs, product analytics, help desks) that don't talk to each other properly. Adding AI into that mix without clear data flow or training only widens the gap.

Adoption stalls because of this disconnected infrastructure. On top of that, it makes proving ROI more difficult. Many CE professionals struggle with duct-tapping tools together. Because no one tool does everything well, "you end up with the best webinar tool, the best community platform, the best academy... And then a million disconnected reports", shared Alisa Dubik.

> **"Reporting is a nightmare. I've been without my main dashboard for over a month because of switching LMS vendors. You have to wait for the data, understand the schema, transform it, combine it. And in the meantime, you're flying blind. That's the price of working with so many tools."**



Alisa Dubik
Customer Education Manager @ Gorgias

Content quality (42%) and **data privacy (32.5%)** show that the real hesitation sits at the intersection of trust and accuracy. Customer education is a credibility business. Teams know their content shapes product perception, so "good enough" AI outputs won't cut it.

Data privacy worries also reflect real constraints, especially in regulated industries where every learner touchpoint carries compliance weight.

Because generative AI tools like ChatGPT are so accessible and they bring an immediate boost in productivity, average users tend to turn a blind eye to privacy risks, shared **Dave Derington, from Atlassian**:

> **"If you're using ChatGPT or other similar, regular consumer grade tools, there is a very big liability in that you could expose all of your organizational knowledge and maybe things that you shouldn't. You'll open yourself to the risk that it gets out in public in a way you don't want it to."**



Dave Derington
Sr. Manager – Learning Solutions & Programs @ Atlassian

Stakeholder buy-in (14.6%) and **governance (25.9%)** round out the picture. The appetite to experiment is high on the ground, but executive confidence and clear policy frameworks lag behind. Many teams are moving faster than their organizations can officially sanction.

Teams see the opportunity, but they're being careful about how they build towards it. Even though it's easy to blame the lack of budget, poor alignment between data, policy, and people is the combination of factors that's slowing AI adoption behind the scenes.

AI content is average by default

Across the survey, AI-generated learning content lands solidly in "it's fine, but..." territory. Nearly half of respondents (45.6%) rated **AI content quality at 3 out of 5**.

Choosing the middle score isn't always about indifference. It can also signal cautious optimism ("I see potential in generative AI, but not proven yet") or guarded skepticism ("I'm not ready to say it's better than humans, but I won't dismiss it outright").

Teams are using AI and see value in it, but they do not see it as a plug-and-play replacement for instructional design expertise.

The fact that only 3.3% rated AI content as 1 out of 5 shows that **most people aren't rejecting AI outright**. Instead, they see AI as useful, but only up to the point where human judgment takes over.

The data shows that **AI content is average by default**, which reflects how large language models work: they predict the most likely next word based on patterns learned from massive datasets. This process generates coherent, well-structured outputs, but it doesn't guarantee depth, nuance, or accuracy.

The quality ultimately depends on how clearly you frame the task, how well you structure the inputs, and how much judgment you apply when reviewing and editing the results.

But people often mistake having access for expertise, shared **Eric Mistry from Zapier**:

> **"People think they can 'do art' because they have the tools. It's the same with education and AI. But access isn't expertise. You can splatter paint on a canvas, but that doesn't make you Jackson Pollock. There's invisible craftsmanship behind great work."**



Eric Mistry
AI & Automation Transformation Lead @ Zapier
& Writer of CED Bi-Weekly

Good prompts, strong source material, and a clear quality bar create far better results than generic "write a course about X" requests. AI is embedded in content workflows, but the real differentiator is still human skill.

Skills are lagging behind ambition

Without structured upskilling, AI just amplifies whatever skills (or lack of skills) are already there. When we analyzed how teams plan to build AI skills, we noticed a clear gap between ambition and readiness.

More than half of respondents (51.5%) say they have no formal plan to improve AI literacy by 2026, even as AI becomes more tightly woven into content creation, workflows, and customer-facing experiences.

This is a problem because AI tools are heavily reliant on the input, shared **Mike O'Brien, Owner @ Assisting Intelligence**:

> **"Most people misuse AI. They ask simple questions and accept simple answers, treating it like a vending machine: put in a prompt, take the result, move on. That's a transaction—one that lacks depth, nutrition, value. The real value comes from treating AI as a collaborative sparring partner. You should approach it with intention, you should challenge it, test your thinking, and focus on outcomes, not outputs."**



Mike O'Brien
Founder @ Assisting Intelligence

AI is moving into the core of customer education, while many teams are still relying on informal learning, side projects, and individual curiosity to keep up.

Around one-third are planning in-house workshops, which suggests some teams are starting to create internal structures for learning.

Formal programs are even less common. Only **16.4% mention vendor-led training**, and **17.2% point to external certification**.

That leans toward a "figure it out as you go" culture rather than a deliberate upskilling strategy. As **Eric Mistry from Zapier** puts it:

> **"People expect instant ROI, but AI is like any new skill. You need to train before you see results. The first few months might even slow you down, but you're doing it for the long-term benefits."**



Eric Mistry
AI & Automation Transformation Lead @ Zapier & Writer of CED Bi-Weekly

Without that investment, AI remains something a few motivated individuals experiment with, rather than a shared capability across the team.

Interestingly, hiring consultants is slightly more popular than training. About **18.6% say they plan to hire AI specialists**, which matches what Kristine Kukich, consultant working in customer education, is seeing in the market:

> **"We're entering a phase where specialists who can do one thing really well are finding more traction as consultants than as full-time hires. Between AI and globalization, organizations are turning to niche experts who can jump in and add value quickly."**



Kristine Kukich
Owner @ kristinekukich.com

That approach can unlock quick wins, but it also **risks concentrating AI knowledge in a few roles** instead of spreading it across the function.

There is a lot of experimentation and real intent to use AI, but capability-building is **still mostly reactive**. Teams are pushing AI into more critical workflows faster than they are systematically teaching people how to use it well.

Quality of AI content and loss of human touch are top concerns

To better understand the main anxieties surrounding AI adoption, we analyzed qualitative responses to the question: "What worries you about using AI in customer education?" Six themes emerged from the data.

Concerns with content quality and accuracy (mentioned by ~45%)

The single most dominant theme revolves around **quality degradation** and **AI hallucinations**. Respondents worry that generative AI will lead to "mass-produced," "cookie-cutter," or "factually incorrect" learning materials.

"The better the quality of a course, the more effective and efficient it is… Low-quality education wastes people's time and damages credibility."

This reflects a shared professional standard. Customer education professionals **view accuracy and craftsmanship as non-negotiable**, and fear that automation could compromise both.

Loss of human touch and authenticity (mentioned by ~30%)

Many express unease about losing **emotional connection**, context, and authenticity in AI-led learning. The "human touch" is seen as the defining feature of customer education that AI cannot replicate.

"Empathy, context, and relationships all contribute to a satisfying customer experience."

"Customers might feel disconnected if interactions become too automated and lack empathy."

This group's concern isn't about technology per se, but about **human dilution** and education becoming transactional, synthetic, or emotionally flat.

Job security and workforce displacement (mentioned by ~20%)

Fear of **role redundancy** is widespread. Respondents mention worries that AI will enable cost-cutting and layoffs, especially where leadership misunderstands AI as a replacement rather than a support system.

"I'm worried companies will see the ease of creating 'good enough' content and lay off a ton of talented individuals."

These comments reflect both personal anxieties and skepticism about how responsibly organizations will use AI.

Data privacy and compliance risks (mentioned by ~18%)

Concerns about data misuse, privacy, security, and ethical boundaries are also prominent.

"Data privacy and protection; I'm uneasy about the safety of the customer data we're pumping to AI tools."

"I worry data stored will be used by governments or for sale."

This indicates a maturing understanding of **AI governance**. Respondents are aware of how data integration with LLMs introduces compliance and reputational risk.

Over-reliance and decline of critical thinking (mentioned by ~15%)

A recurring worry is **over-dependence on AI** leading to intellectual laziness or "de-skilling."

"Thinking you don't have to think yourself."

"People will lose the skills needed, such as writing and creating courses."

While AI promises speed and scale, it can backfire if you become too reliant on it.

Ethical, environmental, and systemic concerns (mentioned by ~10%)

A smaller cluster highlights systemic or societal risks such as misinformation, bias, environmental impact of data centers, and "bad actors" using AI irresponsibly. These comments reflect **broader cultural unease** around AI's unchecked growth and corporate governance.

The emotional tone of these responses points to a widening trust gap in the adoption of AI for education. While practitioners are eager to leverage automation, they remain unconvinced that AI can yet be trusted with educational integrity.

Three themes bring more color to this unease:

1. **Professional pride vs automation:** Educators identify with designing meaningful learning experiences, and fear that AI will devalue their expertise in favor of mass production.

2. **Ethical stewardship:** There is growing recognition that AI in learning must be governed, audited, and interpretable, not just efficient. Quality control, compliance, and transparency are now strategic priorities.

3. **Human connection as competitive advantage:** Many respondents foresee a future where the most valuable learning experiences are those that remain distinctly human. They are looking for a way to blend AI's scalability with empathy, storytelling, mentorship, and real, human connection.

Limitations and opportunities

AI doesn't fix bad systems

If your learning journey is already messy, AI will mostly help you scale the mess. That's the through-line behind a lot of what customer education professionals shared. Dropping generative tools on top of a bad system won't help you create a smarter learning experience.

You can see this in how AI is being used today. On the **reactive** end of the spectrum, teams plug AI into whatever hurts most right now: "make this shorter," "turn this doc into a deck," "summarize this recording." It's helpful, but it lives in one-off tasks.

In the **adaptive** middle, AI starts to show up inside defined workflows (scripts, outlines, video updates, help-center drafts), but still isn't tightly linked to business outcomes.

Only a smaller group has moved into the **proactive** end. They design their learning ecosystem around outcomes first (onboarding time, activation rates, NRR, CSM time saved) and then deliberately decide where AI should accelerate or augment that system.

Less mature teams are still hoping that AI itself will be the strategy—"we'll just use AI to teach our customers."

AI will make it faster to publish, translate, slice, and remix, but it **won't tell you if you're teaching the right things**, to the right people, at the right time.

That still comes down to the clarity of the system, which includes the journey you're designing, the signals you care about, and the outcomes you're willing to be judged on.

> **"The risk I'm seeing for our entire market relates to both business leaders and individuals who over-index on using AI to create learning experiences. I've personally experienced leaders (CEOs) say 'we'll just use AI to teach our customers'. Let that sit for a minute and really think about what that means."**



Dave Derington
Sr. Manager – Learning Solutions & Programs @ Atlassian

Quality still lives (and dies) with human taste

Human taste is an essential skill in the age of AI, as it involves judgment, discernment, and the ability to evaluate AI-generated content beyond mere technical correctness. AI has made it unbelievably easy to make more learning content.

You can spin up scripts, summaries, translations, slide drafts, even full courses in minutes. But the hard part of education is deciding what's worth saying, how in-depth the content should be, and what will genuinely help someone change how they work.

AI is not a magic fix. In fact, you have to invest a lot of time training it and reviewing its output, shared **Luke Marlowe from Beacon**:

> **"AI forgets context sometimes. You have to remind it about tone or formatting. And image generation? Still not there yet. It'll give you what you asked for, plus a random extra person for no reason. It's 95% accurate, but that 5% keeps you humble. You still need to check everything. It can't replace human quality control."**



Luke Marlowe
Customer Education Manager @ Beacon

Customer education professionals repeatedly told us that AI gives them a "60-70% draft" very quickly, but that last 40-30% requires fact-checking, sharpening arguments, adding real-world examples, aligning to product reality, and cleaning up tone. Creation time is going down, but review time is going up.

When AI output sounds polished, it creates a new risk. Language can feel smooth and confident while the substance underneath is shallow, generic, or even wrong. That's where you risk losing the trust of your customers.

This is exactly what sits behind the fear of "AI slop," which refers to a flood of lookalike courses, generic advice that could belong to any product, and learning paths that feel mechanically assembled.

Some respondents worry that if everyone leans on the same models, customer education starts to blur into the same safe, surface-level guidance, with no real point of view. Others are concerned that once learners realize content is flimsy or outdated, they'll start questioning everything else in the academy.

We're in a reality where AI is now handling more of the typing, so **humans have to lean even harder into judgment**. Good taste and high standards become a strategic advantage.

Human connection should be non-negotiable

One of the clearest threads running through the interviews and survey responses is this: **human connection is still the real moat**. Of course, AI can speed things up, draft more assets, and sit in more places across the journey.

But when a learner feels lost, confused, or under pressure to get something right for their job, what they remember is whether a real person was there to support them.

Using AI without the human touch imposes a real risk of creating hollow learning experiences. When support and education are over-automated, people start bumping into walls.

The desire to personalize can backfire with chatbots that loop generic replies or "smart" flows that don't quite fit your customer's situation.

> **"Just because you can create content quickly doesn't mean you should. There's this idea in customer education that more content equals better education. But it doesn't. People are using AI to generate 10x more content, and most of it is low quality. That's what I mean by AI slop. It clutters the learning experience instead of improving it."**



"Part of me would love to hand some support off to AI. But the moment I'm stuck with an AI bot when I need help, I get frustrated really fast. There's a balance to be found, and I don't think many companies have nailed it yet."



Thomas Edwards
Customer Education Rep @ Crossbeam

"Especially in education, I don't believe we're ever going to say, 'Here's your AI chatbot. Problem solved.' That's just not realistic. You can't automate the entire learning experience. Many AI tools just repeat existing information (like FAQs or support articles) without truly helping or adapting to the learner's needs. But what people need is guidance, clarity, and understanding. They don't need regurgitated content."



Antony Leeming
Head of Customer Education @ Beyond Now

On the content side, there's the **danger of wrong, shallow, or biased material**, shared Kristine Kukich:

> **"The biggest risk with AI content is that it sounds polished even when it's not helpful. People don't question it because it reads smoothly, but that can mask a lack of depth or accuracy. In customer education, that's a dangerous trap."**



Kristine Kukich
Owner @ kristinekukich.com

It's also easy to get seduced by the speed of things and then unintentionally diminish the entire purpose of education.

But there's a hidden opportunity here as well. The teams that stand out are the ones using **AI to create more space for human connection**.

They're offloading repetitive writing, transcription, tagging, and data crunching so they can spend their limited time on live workshops, thoughtful feedback, community building, and high-touch moments with customers who are stuck.

The more the basics get automated, the more powerful it becomes to show up as an actual person when it counts.

> **"There's a flood of tools promising you can build a course in 30 seconds. Please don't. You're transforming superficial points into multimedia, and then learners feed it into another AI for a summary. That's the new workflow, and it's tragic."**



Mike O'Brien
Founder @ Assisting Intelligence

Emerging trends and future outlook

Overall sentiment is "cautiously optimistic"

To better understand how professionals in customer education perceive the future of artificial intelligence, we analyzed **48 open-ended responses** to the question: ***"How would you briefly describe the future of AI in customer education?"***

We used ChatGPT-5 to analyze each open-ended response and assign a sentiment score between –1.0 (very negative) and +1.0 (very positive), based on the emotional tone of the language. Words like "exciting" or "promising" push a score upward, while terms such as "risky" or "uncertain" pull it down. Neutral, factual statements stay near zero.

We then grouped responses into three categories:

- **Positive:** above +0.2
- **Neutral:** between –0.2 and +0.2
- **Negative:** below –0.2

These thresholds give a small neutral band around zero and are consistent with how many sentiment-analysis tools handle slight tonal variation.

Before running the analysis, we removed short or incomplete responses to ensure accuracy. The final dataset offers a clear snapshot of how customer education professionals feel about AI today.

The analysis showed that most professionals aren't swept up in hype. They see the potential, but remain realistic about the hurdles.

The large share of **neutral responses (around 72%)** suggests a grounded, exploratory phase. Many teams are experimenting, learning what works, and viewing AI as a practical tool rather than a revolution.

The positive group (27%) reveals a solid base of optimism. These respondents describe AI as "transformational," "empowering," "game-changing," and "essential" to the future of learning.

The **tiny negative share (1%)** signals that outright resistance or fear is rare. Concerns are mostly about job security, data privacy, accuracy, and quality control.

The absence of strong negativity indicates that skepticism has softened, and is now replaced by a more nuanced understanding of both risks and rewards.

Customer education leaders perceive AI as:

- **A necessary enabler:** Critical to scale, efficiency, and learner relevance
- **A creative collaborator:** Augmenting human expertise rather than replacing it
- **A maturing discipline:** Shifting from experimentation to operational integration

Overall, this mix indicates a sentiment we can describe as **"cautiously optimistic."** Customer education leaders are hopeful, hands-on, and trying to use AI responsibly.

Trigger-based and "just-in-time" learning is a priority use case

Personalization in customer education has been a promise for years. Most teams tried to get there with role-based tracks and a handful of "beginner/intermediate/advanced" options. The survey and interviews suggest we're finally moving beyond that.

A profound shift is happening in **how customers enter a learning experience**. It used to start with an email to the academy, a link to the LMS, or a search through a help center. Increasingly, it starts with a question in a chat window or a nudge inside the product.

Copilots, bots, and in-app assistants are becoming the **default front door to customer education**. They greet the learner, interpret what they need, and route them to the right mix of answers, resources, or practice.

This changes the role of the LMS completely. Instead of just being the place where learning happens, it becomes **one of several back-end systems that feed the assistant**. The customer doesn't care which system holds the video or the quiz. They just want a useful response in the moment.

Learning assistants sit on top of fragmented content, pulling from docs, academies, community, and product data, and assembling something that feels coherent and contextual. Done well, this turns "go hunt for the course" into "ask a question and get guided."

With AI in the mix, more teams are starting to design **dynamic learning paths that react to how people actually behave**—what they click, where they get stuck, which questions they keep asking—rather than just who they are on paper (or in CRM records).

> **"Right now, we have a chance to encode business knowledge into conversational AI, a dialogue of insight and assurance. Every chat window can become a learning interface. If we get it right, if AI is crafted carefully, trained responsibly, and paired with human guidance, it could be the most powerful shift in education we've ever seen."**



Mike O'Brien
Founder @ Assisting Intelligence

Dave Derington, Sr. Manager – Learning Solutions & Programs @ Atlassian, shared what this might look like in the future:

> **"Something that I envision (and this is my personal view) is an agent that can watch what you're doing and sense where you may be getting stuck or lost. Not exactly a "Clippy" moment ("I see you're trying to ..."), but instead something that you can prompt to be at your side, live, in-app, just like a mentor or a co-worker who can bring context and assistance as you're working."**



Dave Derington
Sr. Manager – Learning Solutions & Programs @ Atlassian

In that world, AI-powered assistants watch for meaningful patterns such as hesitation in a key workflow, repeated errors on a configuration step, a spike in questions around a new release. **Then they orchestrate what happens next**.

Maybe they'll surface a 90-second explainer inside the UI, suggest a focused micro-course, nudge the learner toward a community thread, or flag a CSM when a human touch will make the biggest difference.

Over time, this highly personalized approach **tightens the link between education and outcomes** like faster activation, fewer support escalations, higher customer satisfaction, and more expansions.

For customer education teams, this is both empowering and demanding. On one hand, assistants finally make "learning in the flow of work" feel real. Help shows up in-app, at the point of friction, in a format that fits the moment.

On the other, **it raises the bar on how content is structured**, tagged, and governed. If the assistant is the front door, then everything behind it has to be accurate, well-scoped, and designed for reuse.

Faster time-to-insight is a growing expectation

One of the clearest expectations emerging from the survey is that **AI should help teams understand what's actually happening much faster**.

Customer education teams are sitting on mountains of data. Course completions, quiz scores, product usage, support tickets, CS notes, community questions, you name it. The problem isn't the lack of data, but the lag between collecting and acting on it.

Traditionally, that meant waiting weeks for someone in data or ops to pull a report and interpret it. AI is now expected to compress that entire loop from "submit a request" to "know what to do next." **Roberto Aiello from Personio**, shared this is already a part of their team's workflow:

> **"AI can help surface insights faster, especially when analyzing product usage or support data. When we identified a foundational knowledge gap, part of the research involved checking support trends; a process that AI could make even more efficient."**



Roberto Aiello
Sr. Learning Experience Designer @ Personio

Chatting with AI to get insights is one of the most intriguing emerging capabilities with **more than 66% of respondents expressing excitement** about the potential here.

Teams want AI to answer questions such as: Which modules correlate most with successful activation? Where do learners consistently drop off? Which topics drive repeat support tickets even after training?

Finally, **time-to-insight becomes a success metric** in itself. The faster a team can see what's working (and what's not), the faster they can adjust paths, rewrite content, or design new interventions.

Instead of relying on quarterly deep dives, customer education teams are aiming for a more continuous feedback loop. They want small, frequent updates guided by AI-generated patterns and summaries.

AI is increasingly seen as the potential connective tissue between otherwise siloed systems. Many are hoping that AI will become powerful and reliable enough to connect the fragmented data about their customers because they're struggling to connect several tools and making too many assumptions.

Ideally, they would want to **resurface learner data much faster**, identify the connection between learner behavior and customer health with more confidence, and understand how they can automatically trigger the right type of educational content for customers, depending on their knowledge gaps and needs.

> **"I can't code or run SQL, but I'd love to access data without waiting on RevOps. AI could show me who's engaging, who's struggling, and help me build the right learning paths for each customer."**



Thomas Edwards
Customer Education Rep @ Crossbeam

Educators will get pushed into more strategic, technical roles

A few years ago, the job of a Customer Education Manager was often framed as "identify learner needs, build courses, ship assets, update docs." But today, AI is rewriting what the job actually is.

The people we spoke to are sounding a lot more like product strategists and systems thinkers than traditional course producers. They're hands-on with HTML, they're talking about data flows, warehouse events, in-product prompts, experiment design, and how learning ties into time-to-value and retention.

> **"Oddly enough, experimenting with AI has forced me to take a much more technical view. I've had to learn how servers work, how to configure chatbots, how to integrate learning directly into the product. It's pushed me closer to a product manager mindset, not just content creation."**



Antony Leeming
Head of Customer Education @ Beyond Now

Luke Marlowe, Customer Education Manager @ Beacon, overcame his initial resistance to AI and found it turned into a "healthy working relationship":

> **"I've actually come to really enjoy coding, it's fun. And combining it with AI has been far more helpful than I expected. I was a bit hesitant to use it at first, but it surprised me by not just giving answers. It explains why. It'll say, 'You need to remove one of these brackets,' and suddenly I understand the logic. Working with AI has turned into a surprisingly healthy working relationship."**



Luke Marlowe
Customer Education Manager @ Beacon

The intersection of customer education and tech literacy is giving rise to several emerging role archetypes.

The Orchestrator is someone who maps and manages the entire learning ecosystem end to end. They understand the LMS, product analytics, community, support, and AI agents, and make informed decisions about where education should show up next.

The Prompt Engineer appears in a practical, non-hyped form. This person frames problems clearly, provides the right context, and translates broad goals into precise instructions an AI system can use.

The Insight Synthesizer uses AI as an analysis partner. They surface patterns from call transcripts, tickets, and usage data, and help determine what should be built, refined, or retired.

The AI Translator sits between tools, teams, and learners, ensuring that AI-shaped outputs remain human, accurate, and on-brand.

Notably, none of these archetypes are purely technical roles. They blend instructional design, product thinking, and enough technical fluency to work effectively with agents, APIs, and in-product experiences.

For customer education teams, this has two implications.

First, hiring and development need to shift toward people who are comfortable with ambiguity, systems, and experimentation, not just content production.

Second, new career paths are opening up. We'll likely see new roles such as learning strategists, ecosystem architects, owners of AI-enabled education. AI is stretching CE roles and making them technical by default.

> **"I am now thinking of IDs and their ability to be more like Learning Consultants or even Strategists. What's important is that we expand upon what IDs can do, in much less time, and with greater effectiveness (and quality)."**



Dave Derington
Sr. Manager – Learning Solutions & Programs @ Atlassian

Section 6

The way forward

The way forward

AI is already shaping the tools you log into, the questions your executives ask, and what customers expect from your programs. The real shift now is moving from scattered experiments to intentional use. You need to choose where AI belongs in your workflows and what you want it to change.

With that in mind, here are four practical imperatives to guide your next steps.

1.

Educate your team: AI literacy is now part of the job

2.

Audit your workflows: See where AI is already appearing

3.

Build guardrails: Protect tone, trust, and learners

4.

Start small, but start as soon as possible

"AI isn't able to be strategic. At least not yet. It won't tell you where the content gaps are or help you prioritize based on business goals. There are still many reasons why you might choose not to educate on something. That kind of judgment and context still requires human reasoning."



Alisa Dubik
Customer Education Manager @ Gorgias

1.

Educate your team: AI literacy is now part of the job

If your team doesn't understand how AI works, where it fails, and how to get the best from it, you'll keep getting average output. Not everyone needs to become a highly skilled prompt engineer, but they need to have enough understanding to:

- **Frame clear, contextual prompts**
- **Spot shallow or incorrect answers**
- **Know when a use case is safe to automate and when it isn't**

That might look like short internal tests ("rewrite this script with AI and compare versions"), sharing real examples from your own workflows, or pairing less-experienced teammates with early adopters. But you need to make sure AI feels like a tool your team can control and shape.

This also creates an opportunity to **democratize and encourage AI use** by building custom GPTs in safe environments. You'll increase output while team members can work on their prompting skills.



> **"Creating video content used to require one person with video expertise. Now, with our AI video tool and a custom GPT for script writing, anyone on the team can produce videos that look and sound the same. That consistency is really valuable."**



Danielle Evans
Director of Customer Education @ Sendoso

So, how do you actually work on AI literacy within your organization? Here's where you can start:

Pick one workflow (it can be rewriting, outlining, summarizing) and train everyone on it

Choose a single workflow and make it the shared foundation for your team's AI use. When everyone practices the same task, patterns become visible. You'll notice what information AI needs, where it fails, and how much context improves the output.

Instead of everyone experimenting in different directions, the entire team develops a consistent baseline of skill and judgment, which makes every later use case easier to adopt.

Run weekly 20-minute "AI drills"

Give the team one prompt and have them refine it, re-run it, and analyze why some outputs work better than others. In less than 20 minutes, people learn far more than they would reading a guide.

These drills teach teams to recognize good structure, spot bad reasoning, and understand how small prompt changes shape the result. Over time, they will sharpen instinct and refine their taste for quality.

Create a shared "prompt library" with examples that actually work

A prompt library turns individual experimentation into collective intelligence. Instead of everyone guessing how to get AI to outline a lesson, rewrite a paragraph, or summarize a transcript, they can start from prompts that already perform well.

This cuts down on guesswork, reduces inconsistencies, and helps new team members ramp up quickly. A good library becomes your team's playbook. It's the simplest way to scale quality and control it.

> **"We can't assume people know how to navigate AI just because they have access to it. We need to teach them the terminology, how to structure evaluations, how to frame prompts. That kind of fluency takes intention. It doesn't happen by accident."**



Kristine Kukich
Owner @ kristinekukich.com

To discover great prompts and ways to apply AI in customer education, **watch this webinar.**

Identify 1-2 AI champions who review outputs before they're used publicly

Chances are, there are people inside your organization who are already using AI and actively discovering new use cases. Those could potentially become your AI champions. They are important people who act as quality filters.

They are the ones who spot common errors, catch hallucinations, and ensure outputs stay consistent with your standards. Having 1-2 designated reviewers accelerates adoption because the rest of the team feels safe experimenting, knowing someone experienced will catch issues before anything reaches customers.

2.

Audit your workflows: See where AI is already appearing

Most teams are already using AI in small, ad hoc ways. They're drafting emails, cleaning up copy, summarizing call notes, without ever calling it a strategy. Before you design anything new, map what's actually happening now:



This audit doesn't have to be formal. Even a simple "day in the life" mapping of a launch or course build will surface patterns. From there, you can decide which uses should become standard workflows, which need guardrails, and where AI might genuinely unblock the team.

Here's what else you can do:

Track where your team loses time interpreting product or customer signals

CE teams often spend hours translating raw inputs into something instructional. They dig through support tickets to turn them into learning themes, call transcripts into insights, product analytics into module improvements.

During your audit, list every place your team stops to figure out what this means for learners. That is where AI can help by clustering themes, summarizing call notes, extracting patterns from support data, or turning usage metrics into plain-language insights. When AI handles the pre-analysis, your team focuses on decisions and design.

> **"We created a custom GPT that connects to our help center. So whenever we need to design a new certification program or a course, it pulls the relevant help articles and helps propose an outline. That's been huge in terms of time saved and making sure we don't miss key resources."**



Alisa Dubik
Customer Education Manager @ Gorgias

Isolate SME dependencies and let AI do the groundwork

Subject matter experts are irreplaceable, but they're busy. And they rarely deliver information in a way that's instructional-ready.

As you map your workflow, note every point where progress depends on a SME providing context, reviewing drafts, or rewriting technical explanations. These moments slow everything down.

AI can't replace SME judgment, but it can prepare the groundwork: structuring their notes, rewriting jargon-heavy paragraphs, generating draft examples, or creating multiple variations of an activity that SMEs can quickly approve instead of writing from scratch.

Reducing the amount of cognitive "prep work" you push to SMEs is one of the fastest ways to unlock speed and consistency in customer education programs.

> **"We used ChatGPT to draft about 70% of the content for our compensation learning path. That allowed the subject matter expert to focus on injecting meaningful, experience-based perspectives instead of starting from scratch."**



Roberto Aiello
Sr. Learning Experience Designer @ Personio

3.

Build guardrails: Protect tone, trust, and learners

As AI becomes a regular collaborator, quality and ethics can't live in people's heads anymore. They need to be formalized. That often starts with a few basic, but explicit guardrails:

- **Tone and voice:** Shared examples of "this sounds like us" vs "this doesn't," plus simple prompts your team can reuse to steer AI toward your brand.
- **Accuracy and depth:** Rules for when content must be checked against source material, reviewed by SMEs, or tested with a pilot group before going live.
- **Data and privacy:** Clarity on what can be safely pasted into public tools, and when to stay inside governed, organization-grade systems.

These constraints keep you from accidentally undermining trust with learners, CSMs, or leadership. They might even limit your AI use because risks outweigh the potential benefits.

AI can generate content that sounds polished but lacks substance if it isn't guided well. Guardrails are how you keep speed and standards in the same room. Here's how you can achieve this.

> **"Security and privacy are the things that keep me up at night. I'm not a developer, so I can't see what's under the hood. Even if a tool says it's not using private data, I can't be sure. Because we're a finance-focused platform, the risk of exposing customer data is huge. We have to lead with privacy first, even if it limits what we can do with AI."**



Stuart Watson
Product Manager @ Projectworks

Define your "non-negotiables" for instructional accuracy

Customer education teams deal with product behavior, feature nuances, and customer workflows. These are all areas where AI is prone to fabricate details. Create a short list of non-negotiables. This can be terms AI must not change, steps it must not skip, and concepts it must never approximate.

For example: "Terminology must match product labels exactly," or "AI cannot describe functionality not supported in the product." When these rules are explicit, reviewers catch errors faster, and AI becomes a reliable first pass instead of a liability.

Establish a two-layer review before anything learner-facing goes live

Instead of relying on ad hoc SME review, make it structural. The first layer checks whether the AI output follows your guidelines for clarity, tone, and instructional structure. The second layer checks factual accuracy against product truth (eg, docs, release notes, or SME confirmation).

This reduces back-and-forth, prevents misalignment with product teams, and ensures learner-facing materials are both polished and correct. In CE, this two-step review is often the difference between reinforcing the product and accidentally confusing users.

Create explicit rules for handling learner data and customer information

Customer education teams often work with real scenarios, support transcripts, or examples pulled from live accounts. This makes privacy risk uniquely high.

Establish a simple rule: if content includes customer data, internal metrics, or sensitive context, it must stay in governed, organization-grade AI tools. It should never be shared in public models.

Document the exact categories considered "sensitive," and train your team to recognize them. This protects your learners, safeguards your company, and prevents the accidental leakage that keeps CE leaders and product managers awake at night.

> **"We work with global teams and customers from diverse cultures and languages. That diversity is powerful, but it means AI outputs must be standardized. Consistent terminology ensures every learner feels guided by one clear, unified voice."**



Sabrina Relevy
Product Education Manager @ Nayax

4.

Start small, but start as soon as possible

You don't need a grand AI transformation roadmap to make progress. But you do need one deliberate experiment you're willing to own and measure. For example:

- **Standardizing AI-assisted course outlines for every new program**
- **Using AI to update and version a specific batch of videos or articles**
- **Having an assistant summarize customer call notes and flag recurring themes**

Pick a pilot project that is high-impact and low-risk. Then spend some time defining what success looks like for you. Is it time saved, increase in quality, fewer revision cycles, clearer insight about your customers?

Treat it like a product experiment. Launch, observe, measure, and iterate. Once it works, turn it into "this is how we do things here." Don't let it become a one-off win that disappears when the project ends.

The first successful experiment often creates a snowball effect within an organization. People get excited when they see results, and when that happens, it's important to give them room to explore the possibilities.

> **Once you reach a critical mass of people using AI, small use cases start emerging from unexpected corners. Folks who wouldn't typically use AI suddenly bring new ideas, and that's when things get really interesting.**



Eric Mistry
AI & Automation Transformation Lead
@ Zapier & Writer of CED Bi-Weekly

A strong culture of experimentation is what turns individual wins into lasting change. When teams feel safe to test, fail, and try again, innovation compounds.

That requires shifting culture as much as technology. In 2026, leaders need to get comfortable with rewarding curiosity and accepting ambiguity when the impact of AI doesn't translate into numbers right away.

Two useful things to try out here:

1.

Assign a single owner for the pilot and give them real decision-making power

AI pilots stall when ownership is fuzzy. Instead of assigning a committee, pick one person who is accountable for designing the pilot, choosing the prompts, coordinating reviewers, and deciding whether the workflow is ready to standardize or needs another iteration.

When one owner has the mandate to adjust the workflow, escalate issues, and refine the prompt strategy, the pilot moves quickly and doesn't die in endless "we should look into this" conversations.

This is especially important in customer education, where cross-functional dependencies can slow momentum. A single owner keeps the pilot focused and ensures it reaches the finish line.

2.

Document the workflow as you run it, not after (this is how you make the pilot repeatable)

Most teams run a successful AI experiment and then try to "remember" how they did it. Don't wait. Document the workflow in real time. Write down the exact prompt you used, what worked, what failed, what edge cases emerged, and what the reviewers flagged.

This living record becomes your first real SOP for AI-assisted work. It also makes onboarding far easier. New team members can follow a proven process instead of guessing. For CE teams specifically, this means you build consistency across multiple authors and reviewers, which prevents quality drift and makes it easier to scale your program without losing coherence.

Section 7

How LearnWorlds supports customer education

How LearnWorlds supports customer education

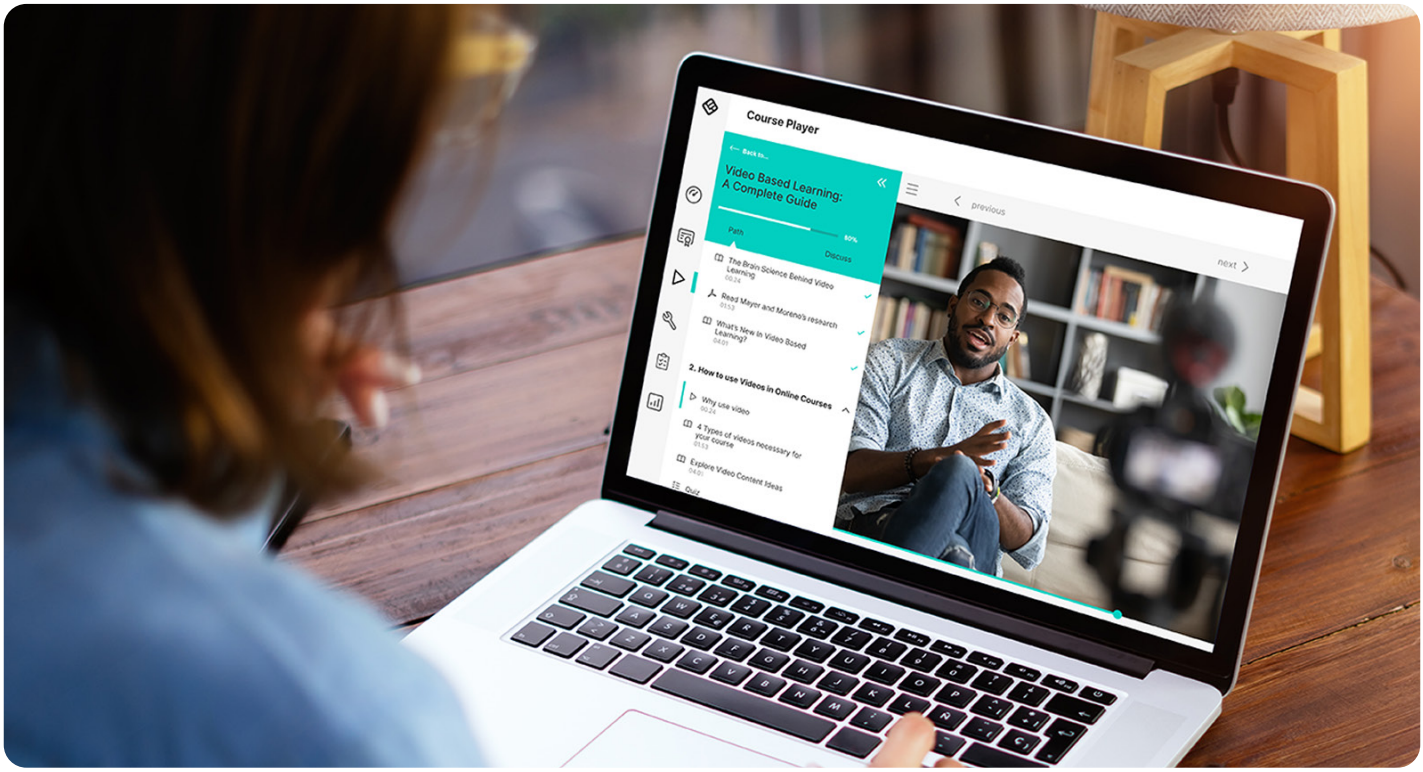
We created this report because customer education leaders deserve a reliable reference point, something that cuts through hype and shows how teams at different stages are approaching AI, where the real opportunities lie, and where certain risks require better guardrails.

The goal is not to push you toward automation for its own sake, but to help you make deliberate choices about how AI fits into your workflows and your customer experience. AI is now part of the work, but the real challenge is using it with judgment. It should strengthen your expertise, not replace it.

That's been our stance from the beginning and it continues to shape how AI works inside LearnWorlds.

LearnWorlds' AI supports creation by helping you structure courses, propose activities, and apply instructional approaches like Kolb, Gagné, or ADDIE. It speeds up the work without flattening your voice or your intent. It helps design surveys, grade open responses, apply rubrics, offer AI-guided dialogue, and provide feedback at scale.

Our customers use it in their daily workflows: from AI-generated titles and descriptions to scripted dialogues, dilemmas, and pros-cons analysis. Smaller operational tasks like writing SEO text, drafting emails, and handling the admin side, have become less time-consuming and tedious.



More importantly, AI shortens time-to-insight. We built the AI Insights Hub to bring together the power of advanced analytics and the simplicity of a conversation. Instead of digging through dashboards, you can ask direct questions about performance, drop-offs, or revenue, and AI will return answers you can act on immediately.

We practice the same approach ourselves and it works because the team stays in control.

We use LearnWorlds internally to build our own training, run experiments, update content, analyze insights, and refine our processes. This is how we managed to **revamp our customer academy 10x faster** without a production team or a big budget. Or how we developed an actionable 9-step framework on **how to use AI in Customer Education** so that you learn how to move faster while preserving the quality of your program.

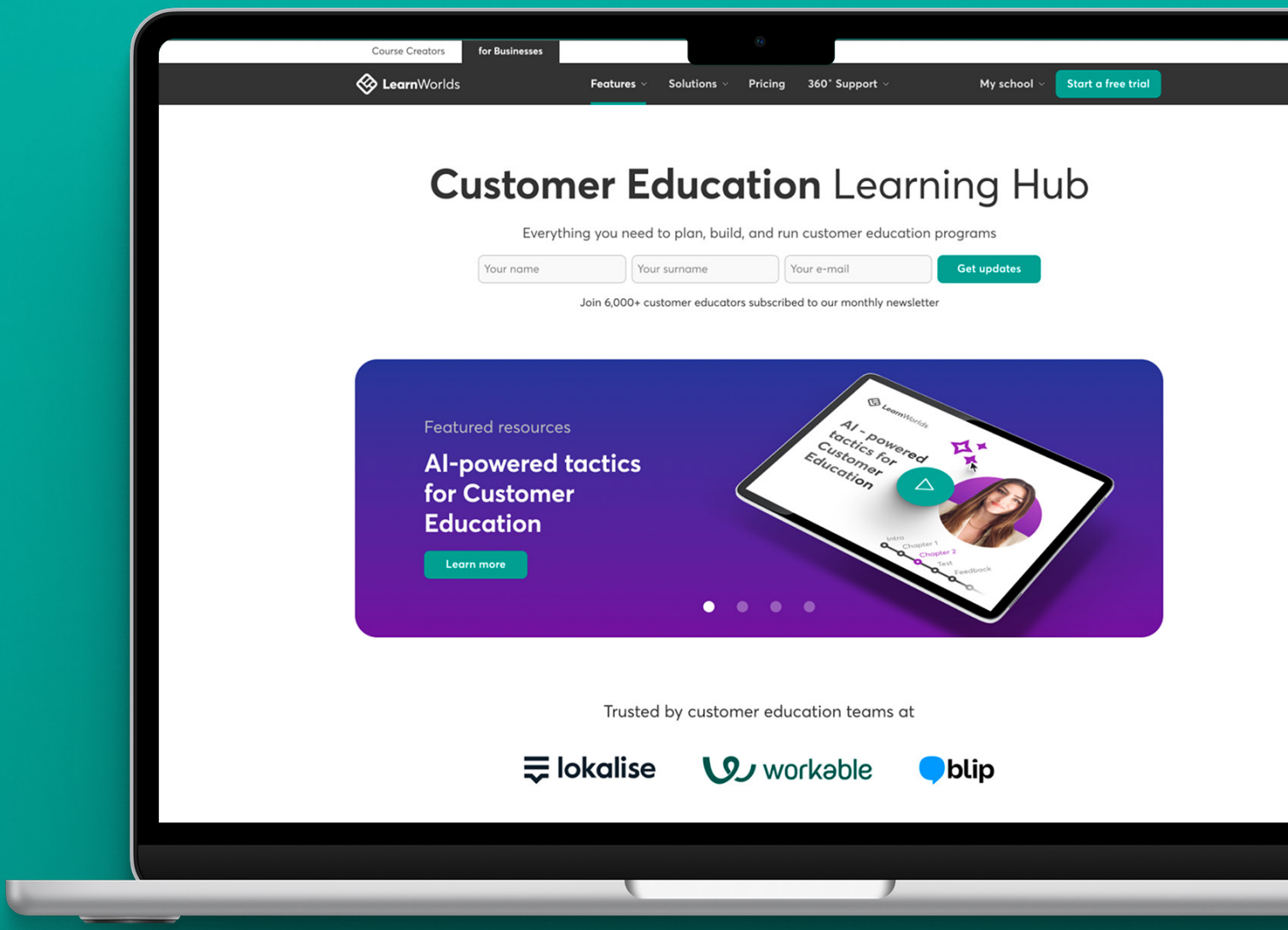
We hold ourselves to the same expectations we outline for our customers: clear structure, data-informed decisions, and AI that lightens the load without lowering the standard.

That's ultimately why this report exists. We wanted to share what we're seeing across the field and to help teams move from scattered experimentation to intentional practice.

AI should make your work faster to execute and easier to maintain while your expertise stays at the center. If that's the direction you're headed, LearnWorlds can help you get there.

If you want to see how it could work for your specific business case, you can **schedule a call with one of our learning experts**.





As CE roles expand to include strategy, systems thinking, and data interpretation, teams need tools that can keep pace. To stay in the loop with how customer education is changing, visit our Customer Education Hub and subscribe to the newsletter.

Customer Education Hub

2026 State of AI in Customer Education



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