



PENDO 
MONIUM
2024

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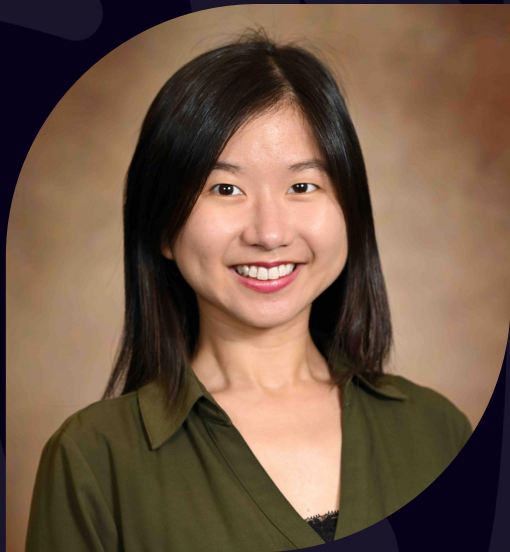
**Cultivate user habits:
Transforming onboarding &
retention with Pendo**



Agenda

- **Personalizing the onboarding journey**
- **Delivering timely reminders and anchoring on the core features**
- **Continuously engaging and reinforcing habits**

About us



Amy Chiu

Adoption & Retention Marketing Manager



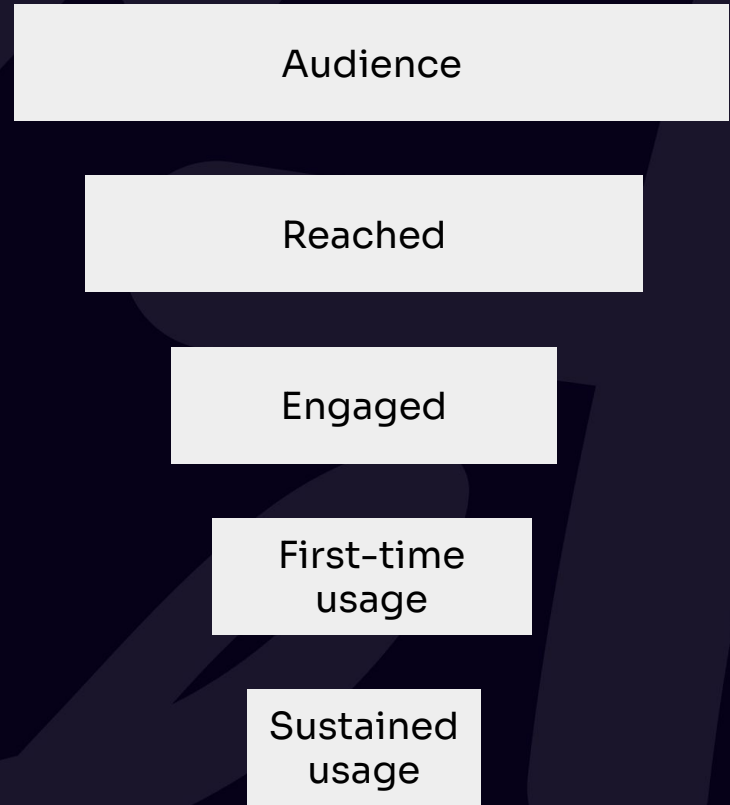
Stephanie Dam

Retention Marketing Manager

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What is Product Adoption at Adobe Experience Cloud?

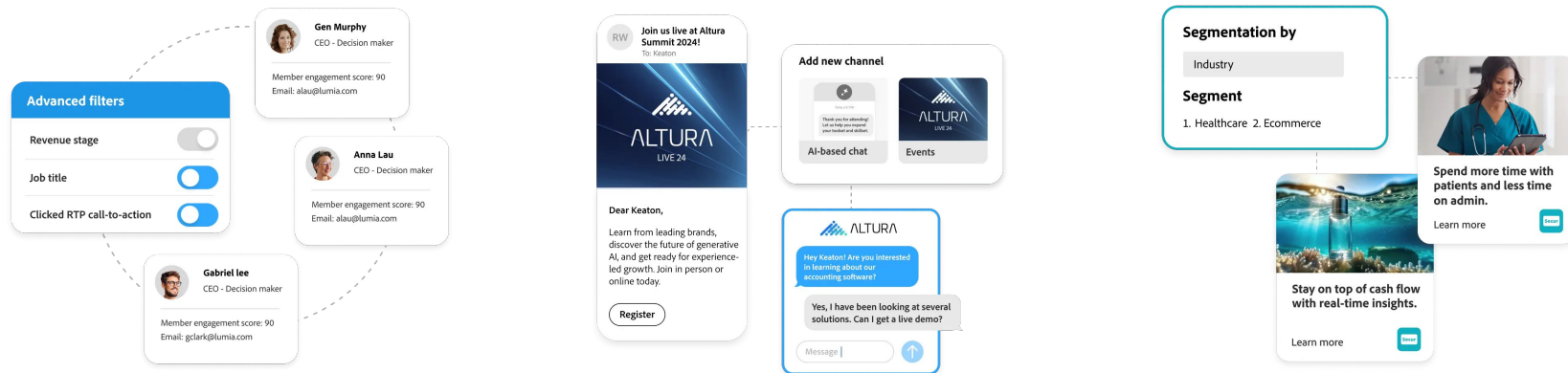
- Empower Adobe Experience Cloud customers to grow and thrive in their roles.
- Deliver personalized learning content with multiple channels post-sale.
- Feature adoption funnel: measurement from content reached to sustained usage.



Adobe Marketo Engage



Powerful B2B marketing automation software that aligns sales and marketing.



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Challenges

- **SaaS subscription decision is made based on value realized.**
- **Enterprise solutions are complex.**
- **Product adoption is not linear.**

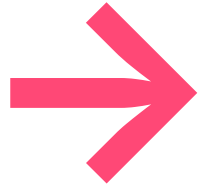
Opportunities



- **Segmentation by persona**
- **Enablement at scale at every stage of customers' post-sale journey.**
- **Point-in-time help in-product.**

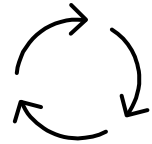
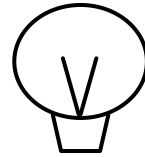
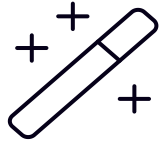
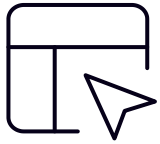


Develop user habits, grow core feature usage, and increase customer value realization.



**Personalizing the
onboarding journey
with conditional
branching and polls.**

Forming habits during onboarding



First Login → Set up moment → Aha moment → Habit moment

Determine personalized learning path



Strategy: Welcome survey to new users to help identify and dictate next best guide for their learning preferences.

How I Pendo: Polls with Radio buttons

Marketing Activities Design Studio Database Analytics

Revenue Explorer

Welcome to Adobe Marketo Engage

Please answer a quick question to help us tailor your experience.
How familiar are you with Marketo Engage?

- Beginner: I've never used it before. Help me get started.
- Intermediate: I have some working knowledge. Show me what else I can do.
- Advanced: I'm very familiar with the product and can explore on my own.

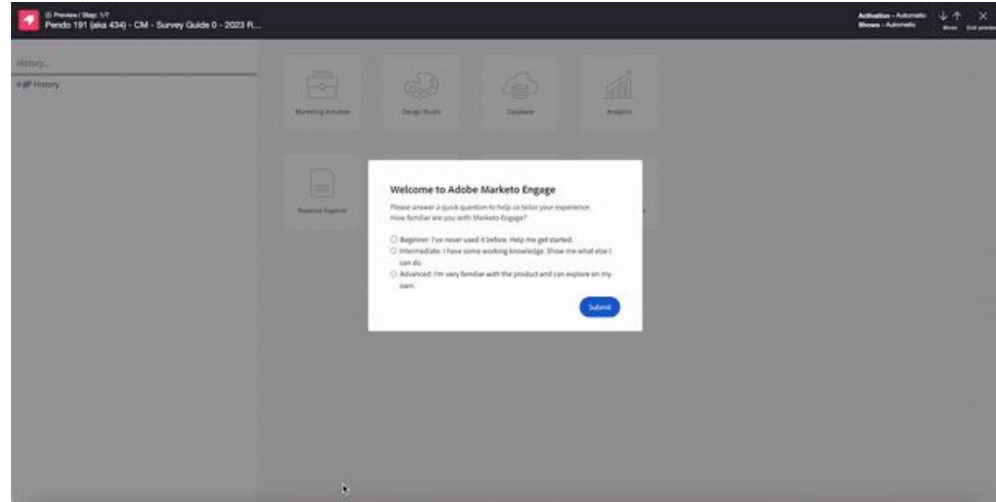
Submit

Trigger next best step in real-time



Strategy: Provide users with relevant content at the right time based on their learning preferences.

How I Pendo: Conditional Branching to navigate user from one step to another immediately



Results: driving change in behavior



After engaging with the in-product guide

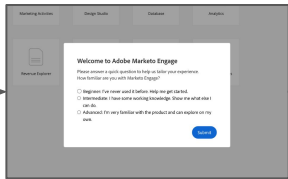
81%

First Time Usage

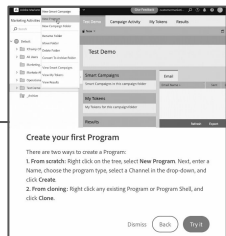
Continue contextually guiding users with in-product triggers and timely reminders



New user

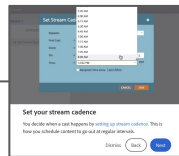
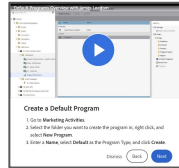
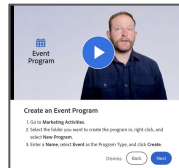
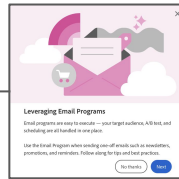


Welcome Survey to determine learning path

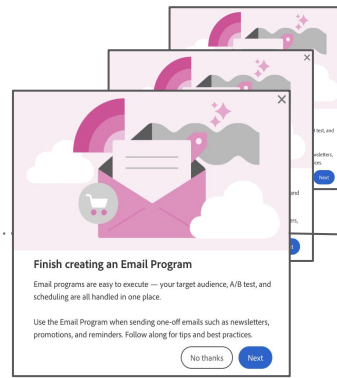


Intermediate

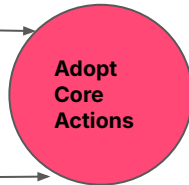
Advanced



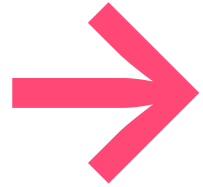
Core feature guides triggered by in-product behavior



Reactivation guides for timely reminders

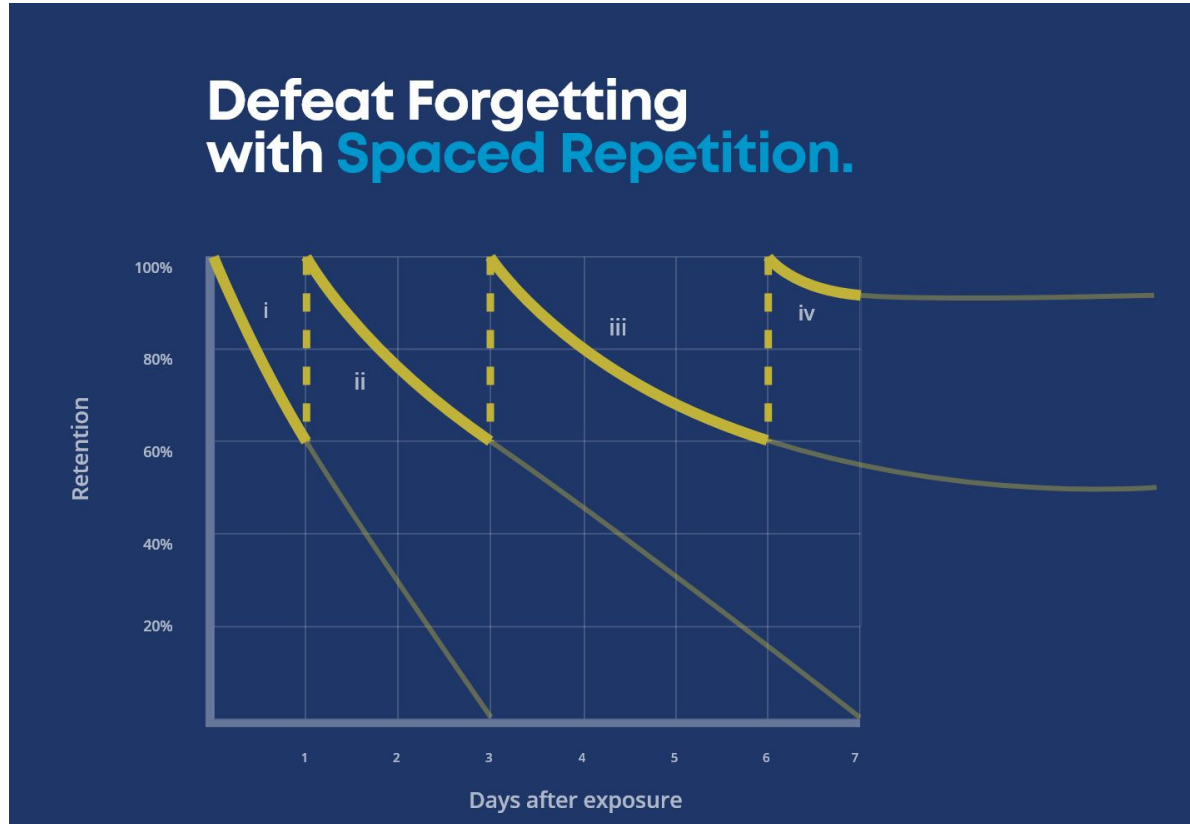


Establish Habit moment



**Delivering timely
reminders to anchor on
the core features**

Spaced repetition.



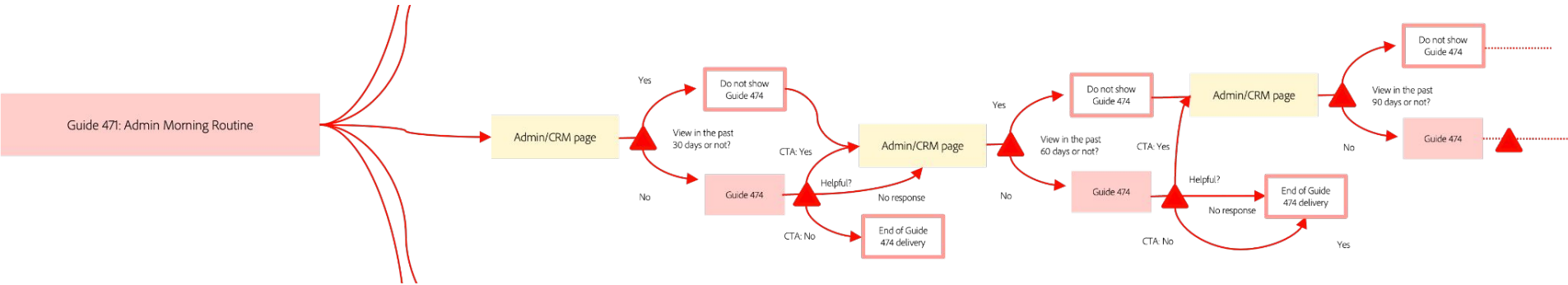
References: brainscape.com

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Learning by repetition



Strategy 1: Nudge users who haven't used the core features for the past 30 days with a helpful tip.



Learning by repetition



Strategy 2: Collect user feedback and cap the reminder guides to avoid reminders becoming harassment.

Feature usage

No usage tracked in the past 30 days

Refresher: Validate Your CRM Sync Status

Take a moment to ensure your CRM Sync is running smoothly. Navigate to the 'Admin' section and head to 'Integration' to review your CRM Sync settings.

1. Check the last sync status on the top right of the interface. For Salesforce and Microsoft Dynamics, sync occurs every 5 minutes.
2. If you notice any abnormal delays in sync, explore, search, or export leads and other objects that failed to synchronize for detailed insights.

Revisit this 45-second video covering this tip in detail.

Was this reminder helpful?

Not helpful Helpful

How can we improve your learning experience?

1. What was the reason for you to select "not helpful"?

- I already knew this tip.
- This guide does not apply to my role & responsibilities.
- The guide showed up at the wrong time.
- I don't like to receive information when I am in the product.
- Other (please specify below)

2. Got more to say? We would love to know what you think of this guide.

Enter text here...

Thank you for your feedback!

We appreciate your honest opinions. For more peer best practices, please visit [Marketing Nation Community](#) and search your questions away!

Define segment rules with usage criteria



How I Pendo: **Time-based + product usage rules** refined targeting.

The screenshot displays the Pendo segment rule configuration interface. On the left is a settings sidebar, and on the right is the main rule configuration area.

Settings Sidebar:

- Settings**
- Name:** 474 - Power Users - Reactivation - Admi
- Description:** Add a description
- Visibility:** Everyone Only Me
- Eligible Visitors:** 14,319
- Guide Eligible:** Yes
- Segments Used:** 1 of 5

Main Rule Configuration Area:

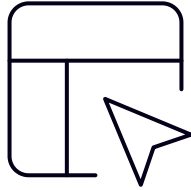
- Rule 1:** Page MLM - Admin | CRM - Salesforce - Sync Status +... Not Seen within last 30 days
- OR**
- Rule 2:** Page MLM - Admin | CRM - Salesforce - Sync Status Not Seen within last 30 days
- OR**
- Rule 3:** Page MLM - Admin | CRM - Microsoft Dynamics - Syn... Not Seen within last 30 days
- OR**
- Rule 4:** Page MLM-Admin | CRM - Microsoft Dynamics - Sync ... Not Seen within last 30 days

A blue button labeled "OR" is located at the bottom of the rule configuration area.

Add nested segments to avoid repetition



How I Pendo: Account for **guide engagement** and **product usage** status in your segments.



Guide Click



Feature Click/Page view

Examples: nested segments



1. Non/low-adopters

2. Churn

The screenshot shows a Pendo segment configuration for '512 - Power Users - Managing Duplicates in Datab...'. The segment is defined by a series of nested 'AND' conditions:

- Segment is equal to 512a - Power Users - Managing Duplicates in Datab... (Not used ever)
- OR
- Segment is equal to 512b - Power Users - Managing Duplicates in Datab... (Low usage)
- OR
- Segment is equal to 512c - Power Users - Managing Duplicates in Datab... (No feature click)
- AND
- Segment is equal to Guide - Exclude Internal Accounts Segment
- AND
- Guide - Exclude Internal Accounts Segment (Includes 54 rules)
- OR
- AND
- Guide - Pendo 512 - CM - Managing Duplicates in Datab... (Not Viewed) ever
- OR
- AND
- mkt_lang contains en

Summary statistics: Eligible Visitors: 30,732; Guide Eligible: Yes; Segments Used: 4 of 5.

The screenshot shows a Pendo segment configuration for '513a - Power Users - Managing Duplicates in Datab...'. The segment is defined by a series of nested 'AND' conditions:

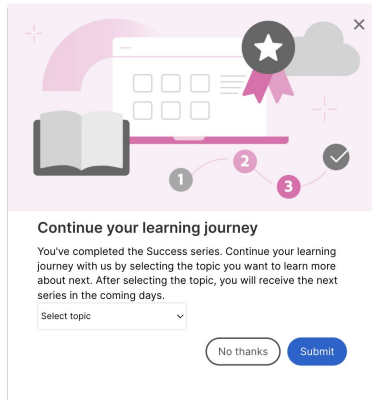
- Segment is equal to 513a - Power Users - Managing Duplicates in Datab... (Used at most once)
- OR
- Segment is equal to 513b - Power Users - Managing Duplicates in Datab... (Used at least once)
- AND
- Segment is equal to Guide - Exclude Internal Accounts Segment
- AND
- Guide - Exclude Internal Accounts Segment (Includes 54 rules)
- OR
- AND
- Segment is not equal to 512 - Power Users - Managing Duplicates in Datab... (Possible Duplicates System Smart List - Guide Center - IMS Users)
- OR
- AND
- mkt_lang contains en

Summary statistics: Eligible Visitors: 39,886; Guide Eligible: Yes; Segments Used: 4 of 5.

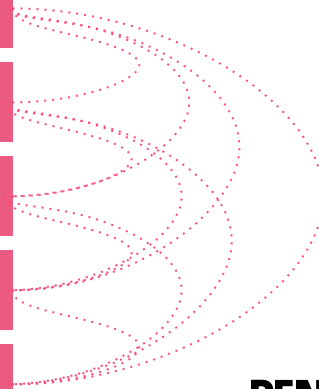
But, learning is not a linear path



- **Strategy:** Allow users to have flexibility to jump between stages in learning core features.
- **How I Pendo:** Offer flexible options with a default path and choose your own journey options with polls.



- Smart Campaigns
- Reporting
- Engagement Program
- Segmentation
- Deliverability



Examples: Include poll responses and guide engagement criteria

Option 1: Choose your own journey
Poll responses to all entry poll guides.

Option 2: Default path
The default next guide after the previous intermediate-level program engagement.

Edit Segment

This segment is currently used by Guides, Reports, and/or other Segments. [View where this is used](#)

Settings

Name
Pendo 229 - 2024 CYOJ SC & SL - Guide

Created By
hatfield@adobe.com

Description
Add a description

Visibility
Everyone Only Me

Eligible Visitors
5,921

Guide Eligible
Yes

Segments Used
1 of 5

Logic Tree:

- Segment is equal to Success - CYOJ - SC & SL - Guide 1 - Survey Opt-In
- Success - CYOJ - SC & SL - Guide 1 - Survey Opt-In (Includes 10 rules)
 - Response to "You've completed the Success series. Continue your learning journey with us by selecting the topic you want to learn more about next. After selecting the topic, you will receive the next series in the coming days." is equal to Smart Campaigns & Smart Lists not within last 1 days
 - Response to "You've completed the Smart Campaigns and Smart Lists Success series. Continue your learning journey with us by selecting the topic you want to learn more about next. After selecting the topic, you will receive the next series in the coming days." is equal to 001652n0z35Ho not within last 1 days
 - Response to "You've completed the Engagemet Programs Success series. Continue your learning journey with us by selecting the topic you want to learn more about next. After selecting the topic, you will receive the next series in the coming days." is equal to Smart Campaigns & Smart Lists not within last 1 days
 - Response to "You've completed the Segmentation Success series. Continue your learning journey with us by selecting the topic you want to learn more about next. After selecting the topic, you will receive the next series in the coming days." is equal to Smart Campaigns & Smart Lists not within last 1 days
 - Response to "You've completed the Reporting Success series. Continue your learning journey with us by selecting the topic you want to learn more about next. After selecting the topic, you will receive the next series in the coming days." is equal to Smart Campaigns & Smart Lists not within last 1 days
 - Response to "You've completed the Deliverability Success series. Continue your learning journey with us by selecting the topic you want to learn more about next. After selecting the topic, you will receive the next series in the coming days." is equal to Smart Campaigns & Smart Lists not within last 1 days
 - Response to "Are you interested in learning more about Engagement Programs, Reporting, Smart Campaigns & Smart Lists, Segmentation, or Deliverability? After selecting a topic from the dropdown below, in the coming days you will receive weekly tips, best practices, and walkthroughs for a 4-5 week period. Once you..."
 - Response to "Continue your learning journey with us by selecting the topic you want to learn more about next. After selecting the topic, you will receive the next series in the coming days." is equal to Smart Campaigns & Smart Lists not within last 1 days
- AND
 - Pendo 229 - CM - Smart Campaign Use Cases not viewed ever
- AND
 - pendo_229_seen is equal to false

Logic Rule 1: Guide Element Pendo 251 - CM - CYOJ Survey - Completed Cor... No thanks Clicked within last 120 days

Logic Rule 2: Guide Element Pendo 251 - CM - CYOJ Survey - Completed Cor... Close Button Clicked within last 120 days

Logic Rule 3: Guide Element Pendo 282 - CM - CYOJ Survey - Opted Out Cor... Close Button Clicked within last 120 days

OR

Key Results

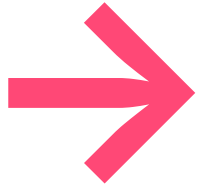
Example with metadata
and usage-based triggers:

Page	First time usage	Sustained usage
Notifications	22% (3,670)	16% (588)
LaunchPoint	16% (2,806)	15% (425)
Web Services	13% (2,010)	12% (232)



Example of default path
and Choose Your Own
Journey:

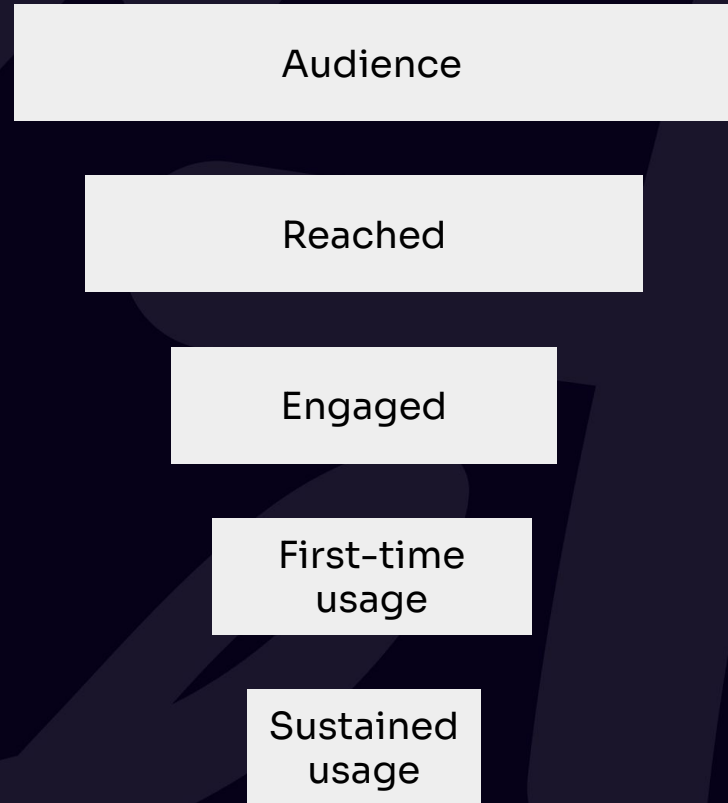
	First time usage	Sustained usage
Before	44% (337)	34% (115)
After	42% (743)	23% (174)



**Continuous
engagement and
habit reinforcement
for 90 days**

Habit reinforcement for 90 days

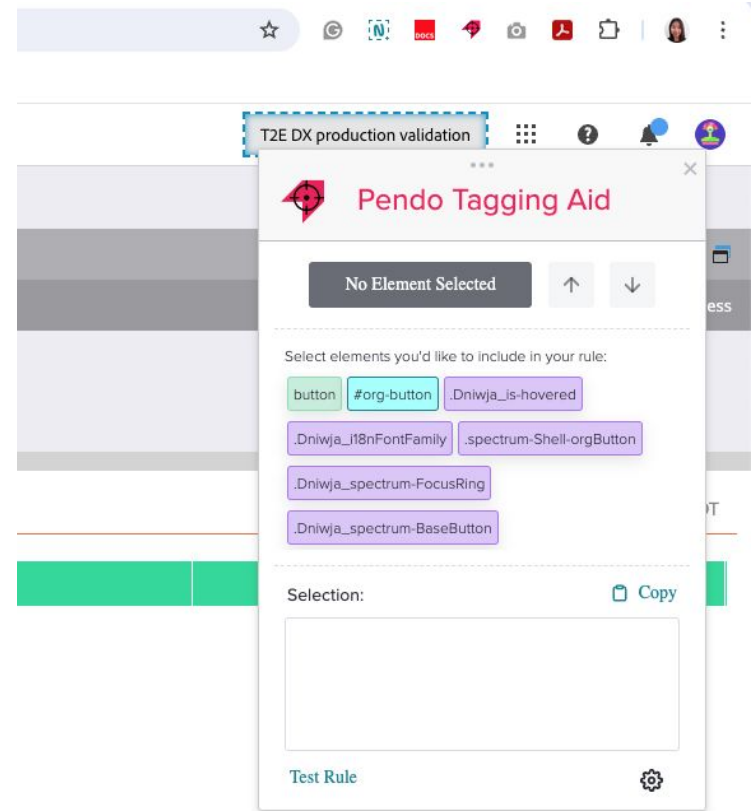
- **Repeat the behaviors until a sustained usage is observed.**
- **How I Pendo:**
 - Developed User Adoption Framework as the team roadmap.
 - Use Feature Adoption Funnel measurement framework to define and track how users move across stages.



Feature tagging to obtain the product signals

■ How I Pendo:

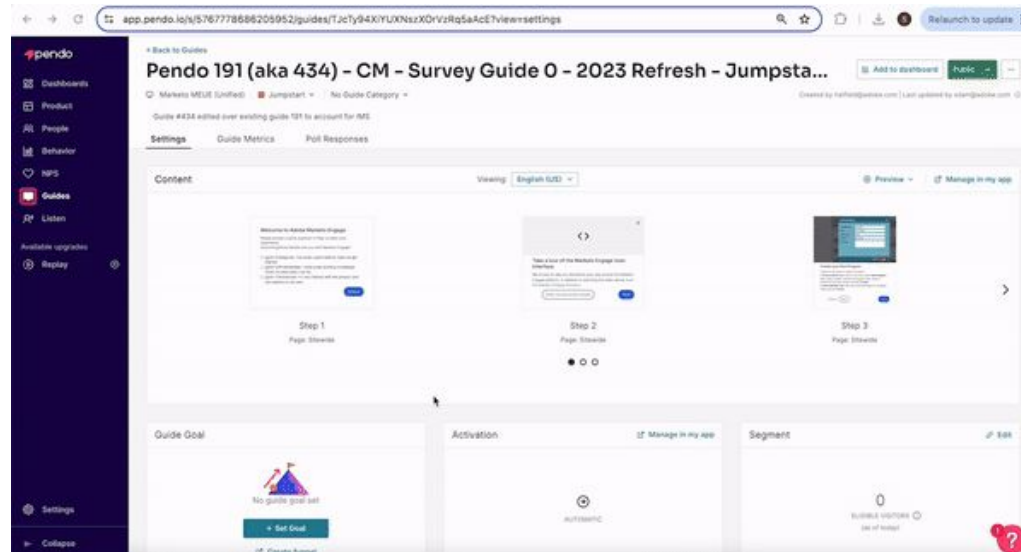
- Download Pendo Tagging Aid if you haven't already.
- Create your own segment.



Set Guide Goals for a snapshot of progress



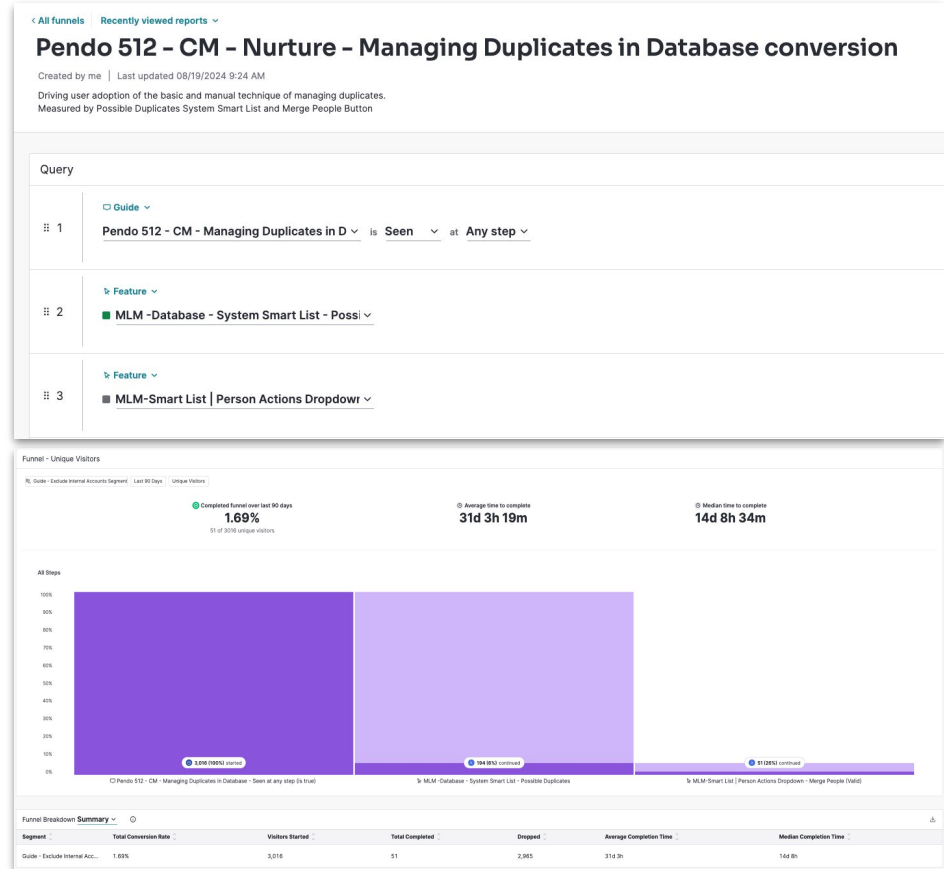
- **Strategy: Regularly measure and monitor performance of guides.**
- **How I Pendo: Set guide goals to quickly and easily pull insights on user behavior after viewing guides.**



Measure a defined series of steps in Funnels



- **Strategy: Measure a predefined route and identify drop off.**
- **How I Pendo: Build the query with **key actions** post guide engagement.**



Key Takeaway 1





Personalize learning experiences to obtain insights and activate guides in real time.



Leverage polls with radio buttons and conditional branching

Key Takeaway 2

 **Refine your targeting based on user behavior**

 **Reduce repetition and streamline optimization with nested segments**



Enhance your segments with metadata and usage-based triggers.



Create segments to nest within guides for flexibility and scale.

Key Takeaway 3

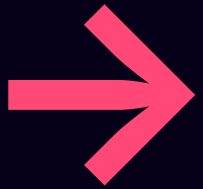


Build guides to drive behavioral changes and measure the habit formation using Pendo Guide Goal and Funnels.



Tagging!! Invest time to build a solid foundation of your measurement and optimization strategy.





Q&A



Thank you!

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