PENDO
MONIUM
2024

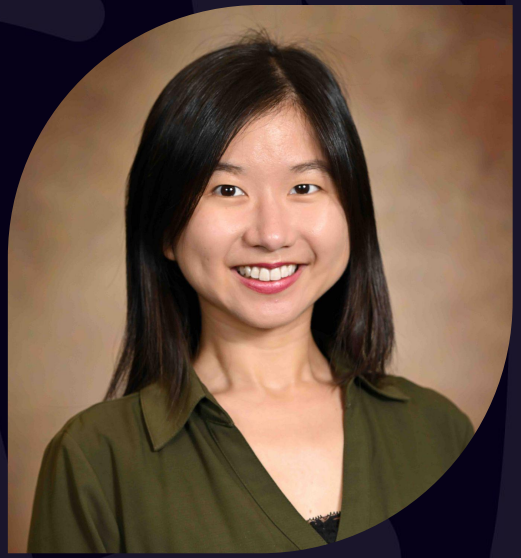
PENDOMONIUM 2024

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



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Adoption & Retention Marketing Manager

Stephanie Dam

Retention Marketing Manager

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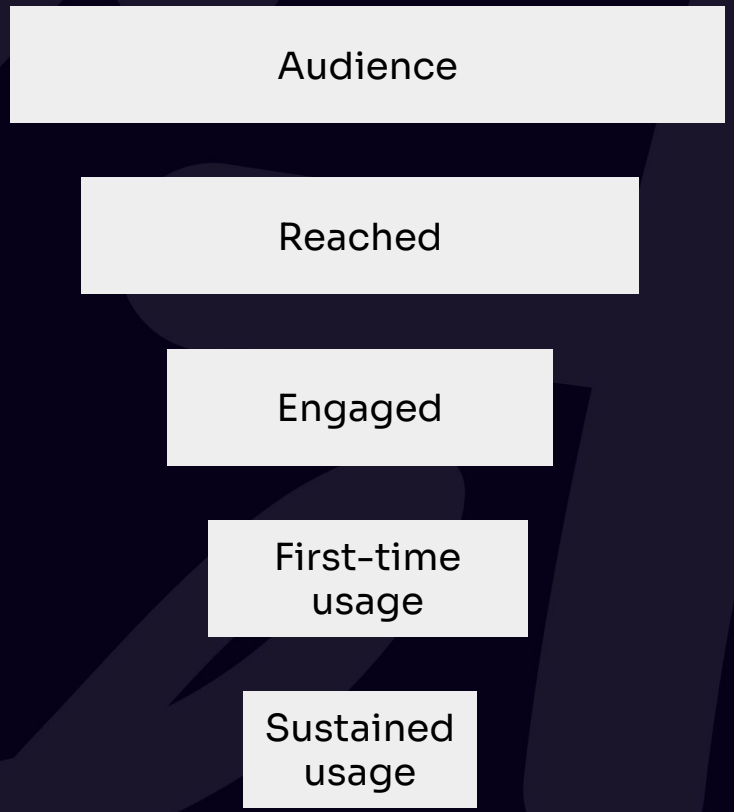
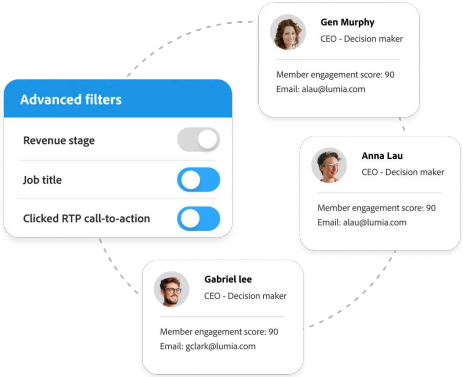
What is Product Adoption at Adobe Experience Cloud?

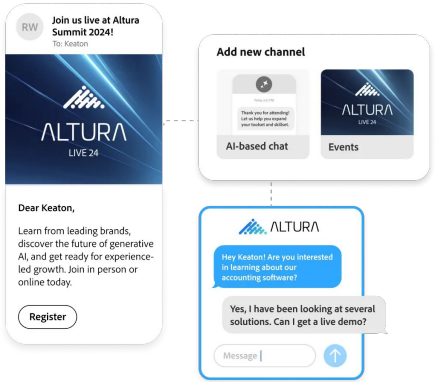
- **Empower Adobe Experience Cloud customers to grow and thrive in their roles.**
- **Deliver personalized learning content with multiple channels post-sale.**
- **Feature adoption funnel: measurement from content reached to sustained usage.**

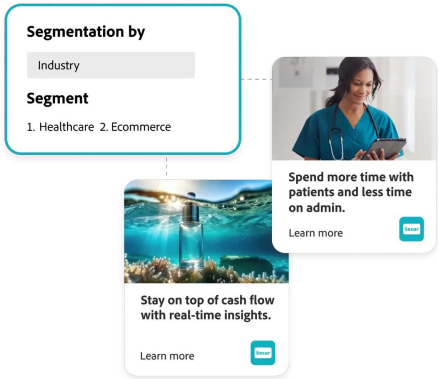


Adobe Marketo Engage

Powerful B2B marketing automation software that aligns sales and marketing.







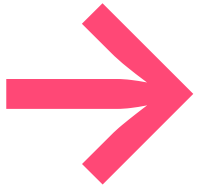
Challenges

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

Opportunities

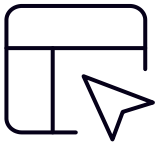
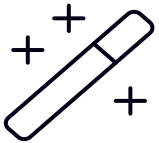
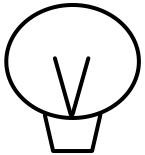
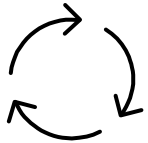
- Segmentation by persona
- Enablement at scale at every stage of customers' post-sale journey.
- Point-in-time help in-product.

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

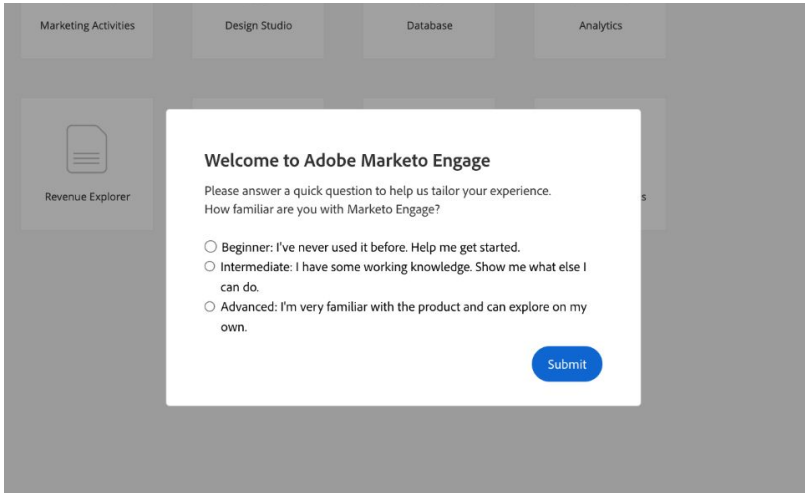





First Login → Set up moment → Aha moment → Habit moment

Determine personalized learning path

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

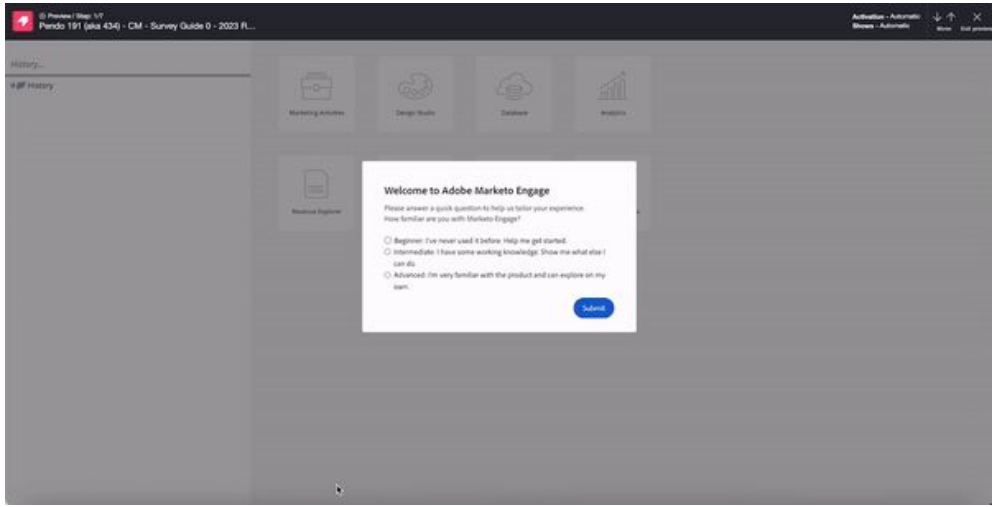
How I Pendo: Polls with Radio buttons



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

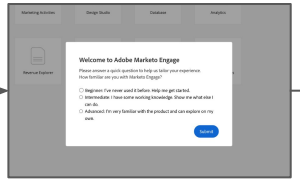
After engaging with the in-product guide

81%

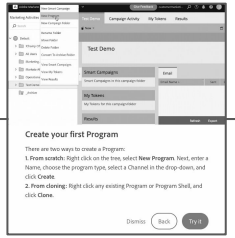
First Time Usage

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

New user

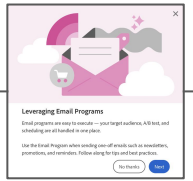


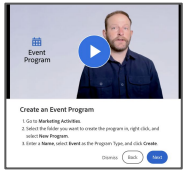
Welcome Survey to determine learning path

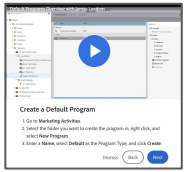


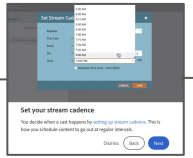
Intermediate

Advanced

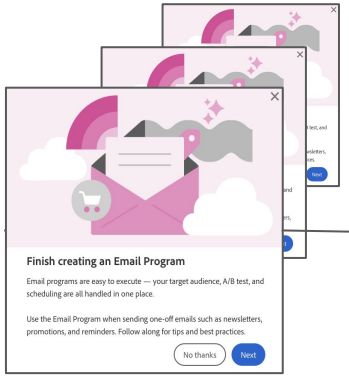








Core feature guides triggered by in-product behavior



Reactivation guides for timely reminders

Adopt Core Actions

Establish Habit moment

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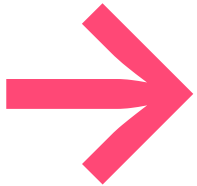
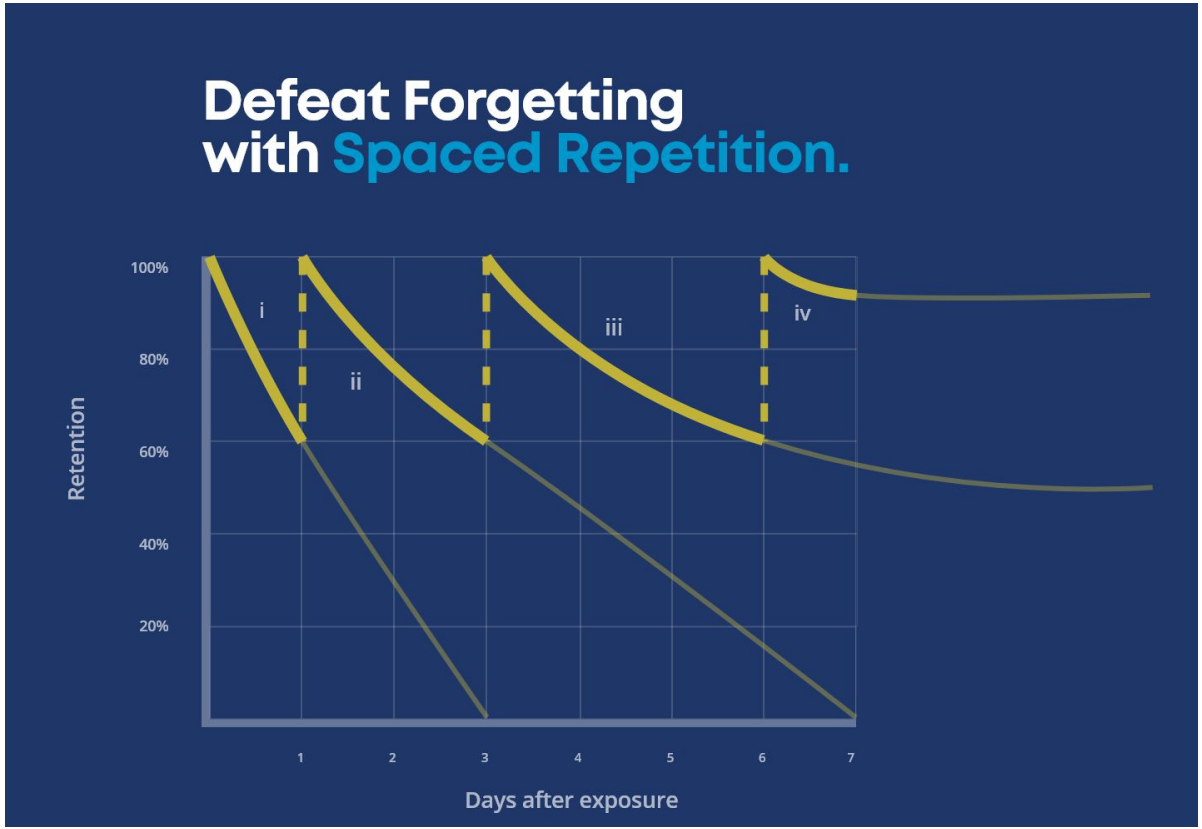


Delivering timely reminders to anchor on the core features

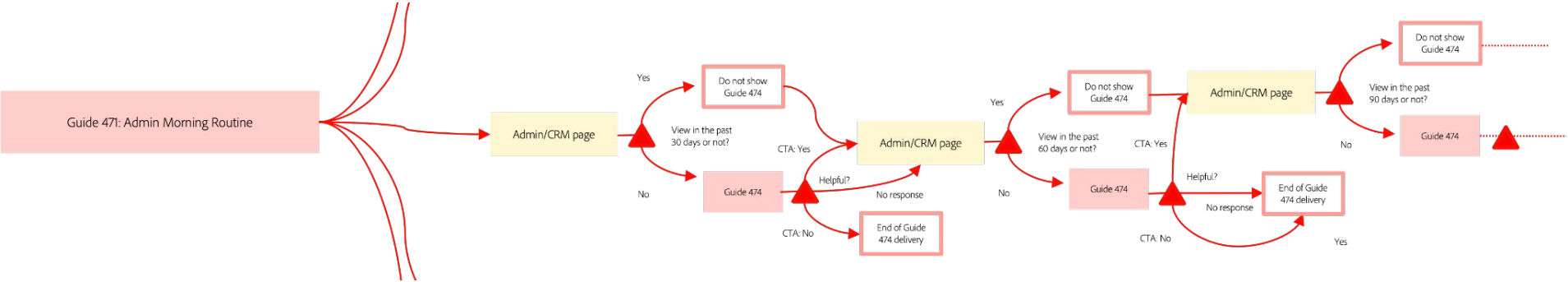
Spaced repetition.



References: brainscape.com

Learning by repetition

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

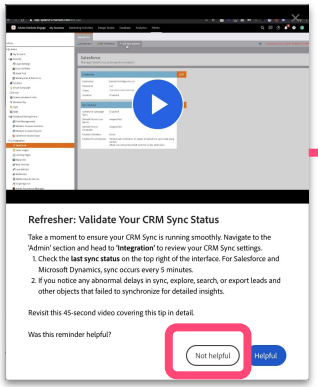


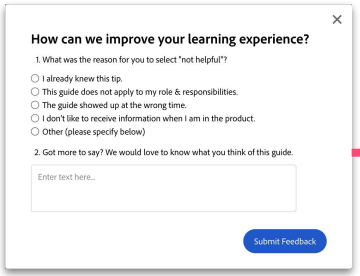
Learning by repetition

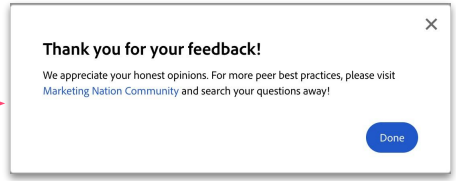
Strategy 2: Collect user feedback and cap the reminder guides to avoid reminders becoming harassment.

Feature usage

No usage tracked in the past 30 days

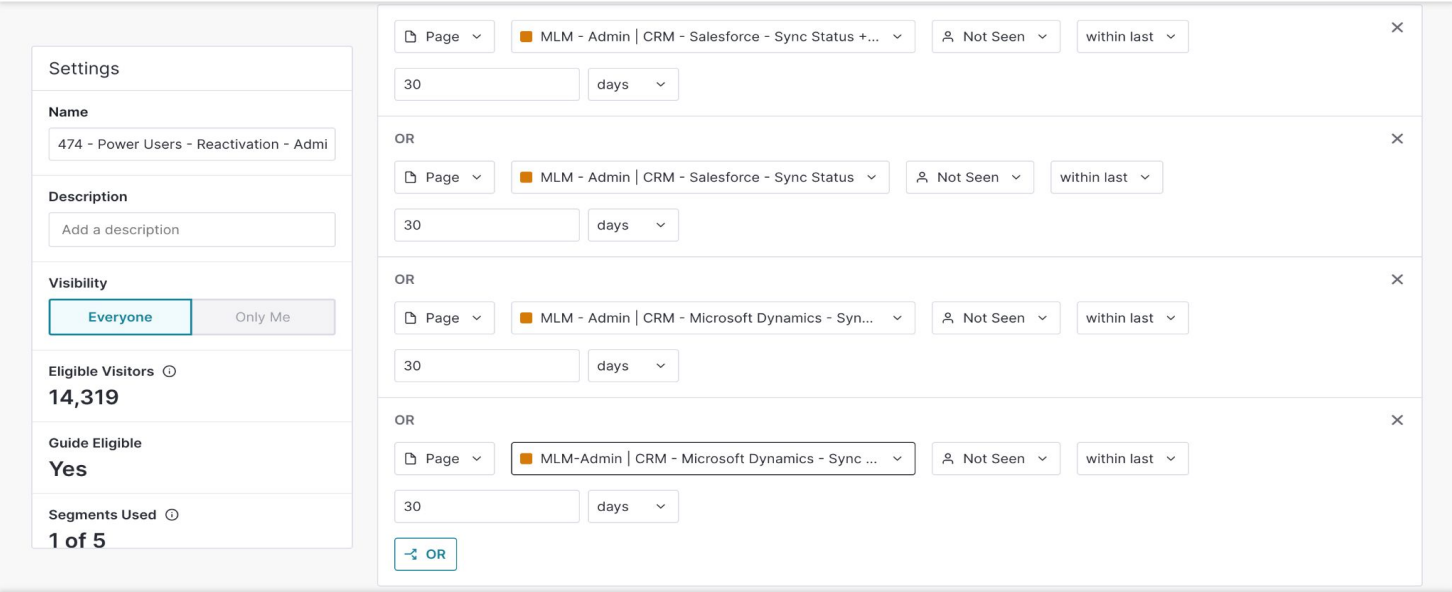






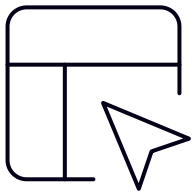
Define segment rules with usage criteria

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



Add nested segments to avoid repetition

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

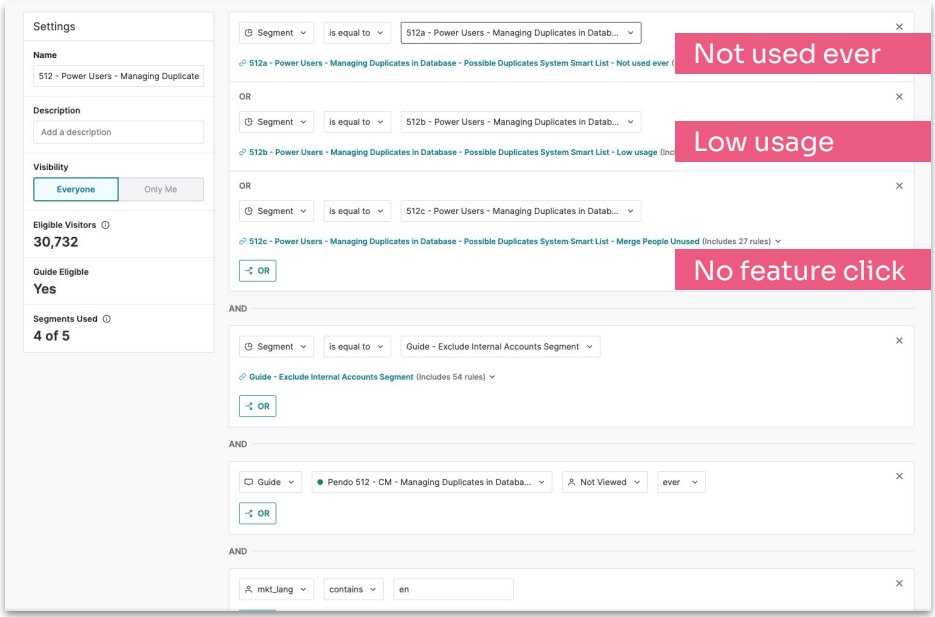


Guide Click

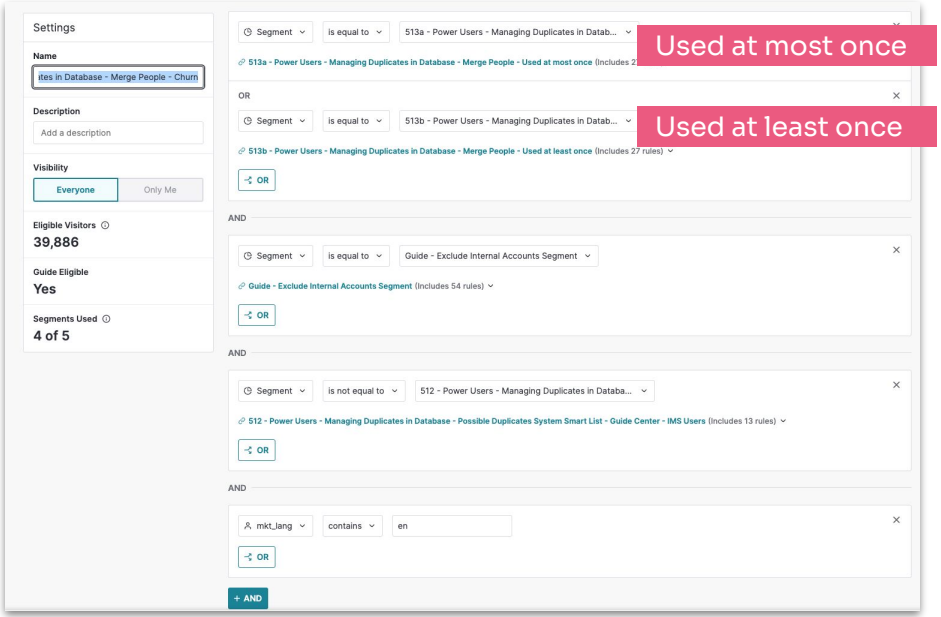
Feature Click/Page view

Examples: nested segments

1. Non/low-adopters

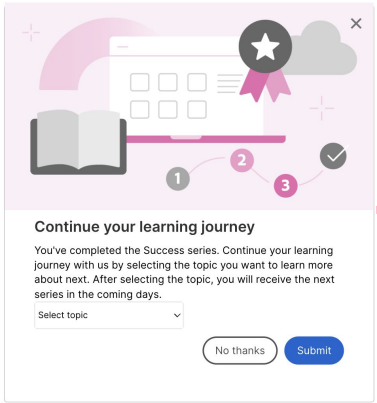


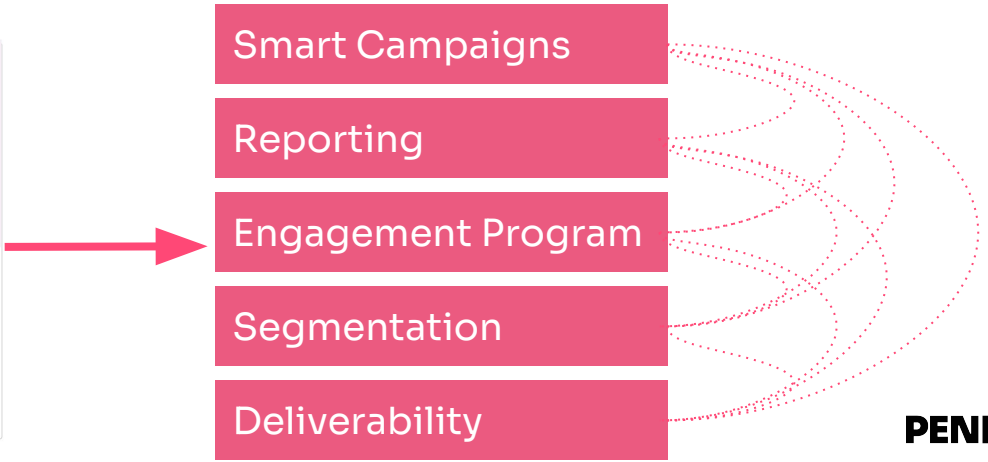
2. Churn



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.**

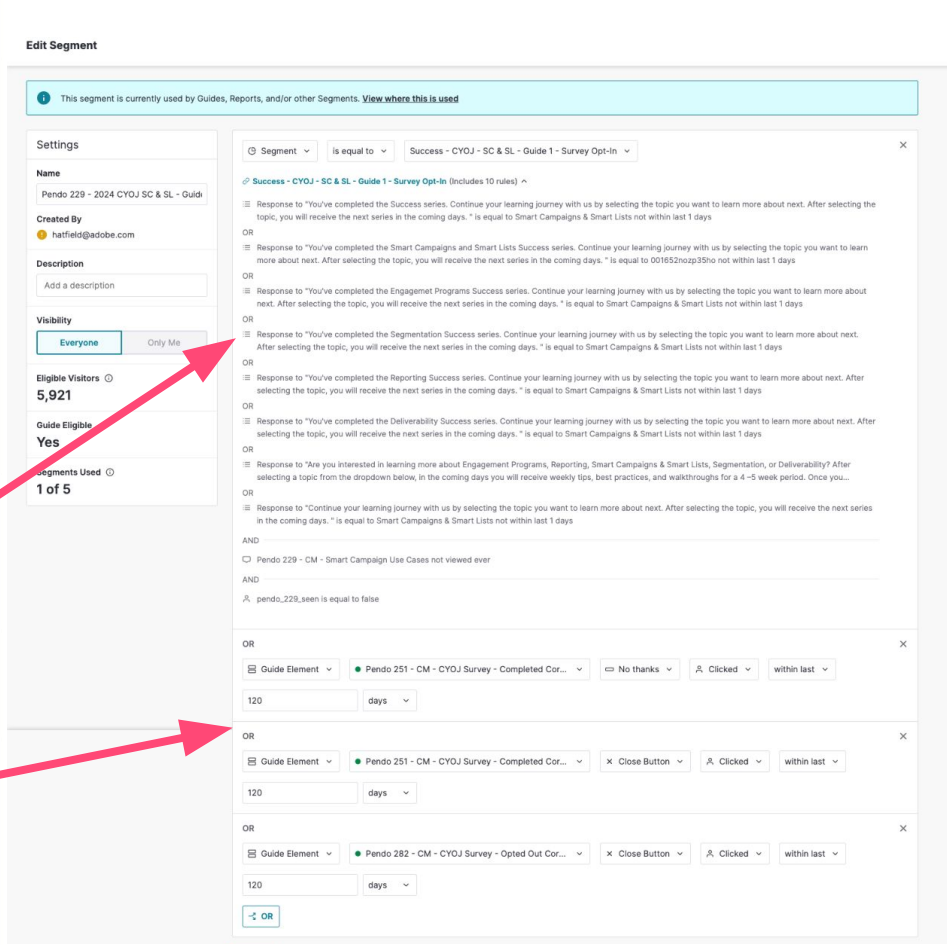




Examples: Include poll responses and guide engagement criteria

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.



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)

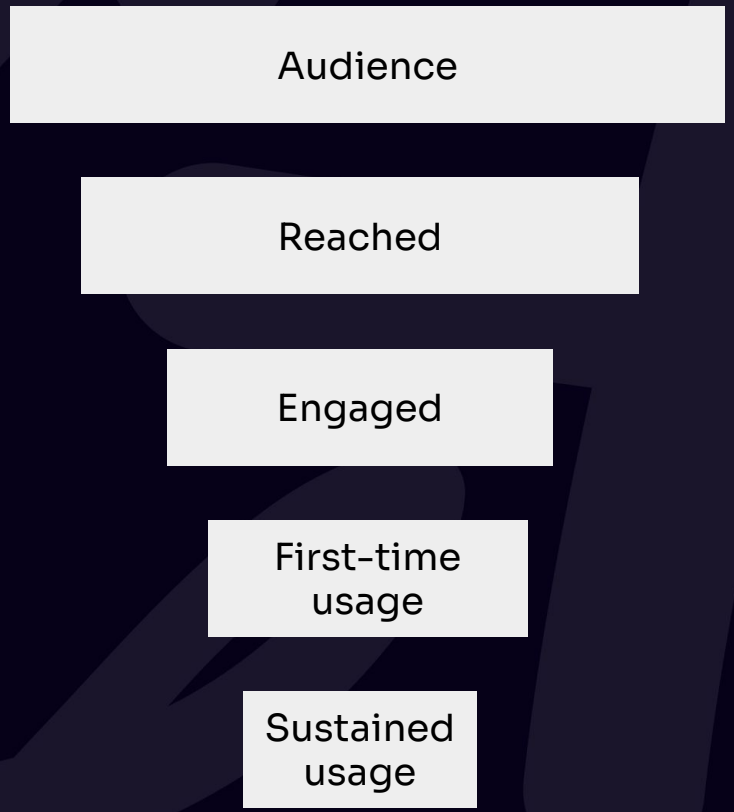
Example of default path and Choose Your Own Journey:

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

Continuous engagement and habit reinforcement for 90 days

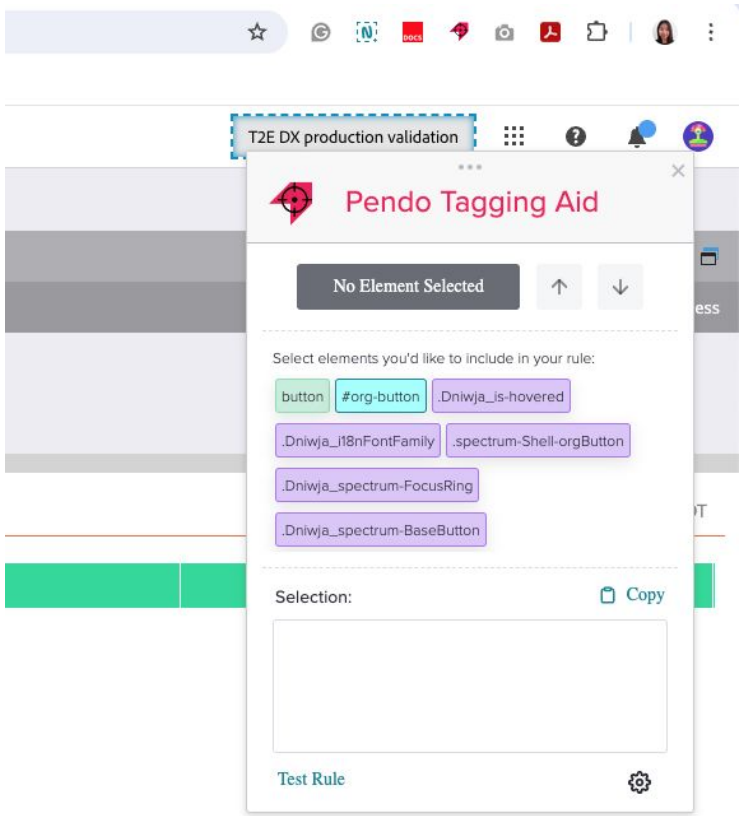
Habit reinforcement for 90 days

- **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.



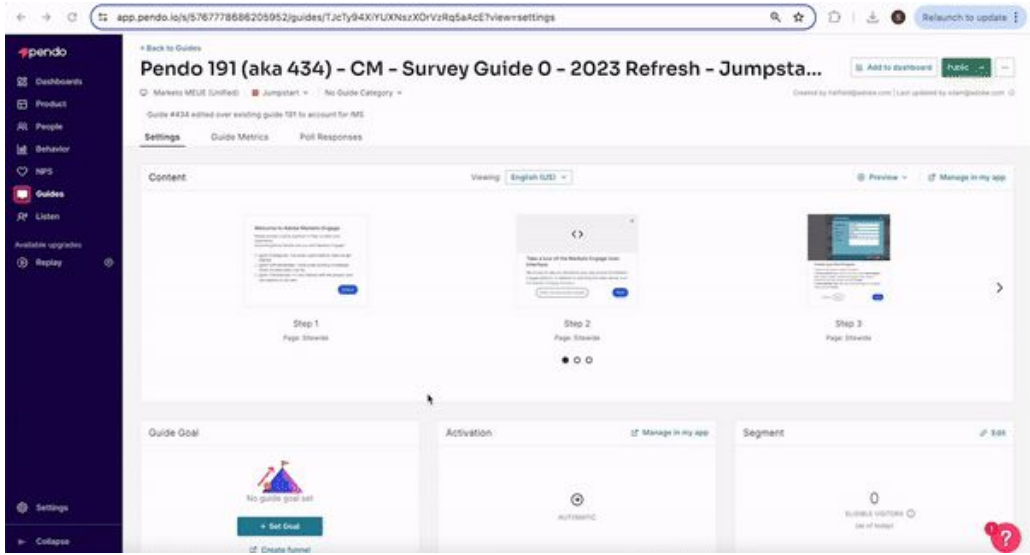
Feature tagging to obtain the product signals

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



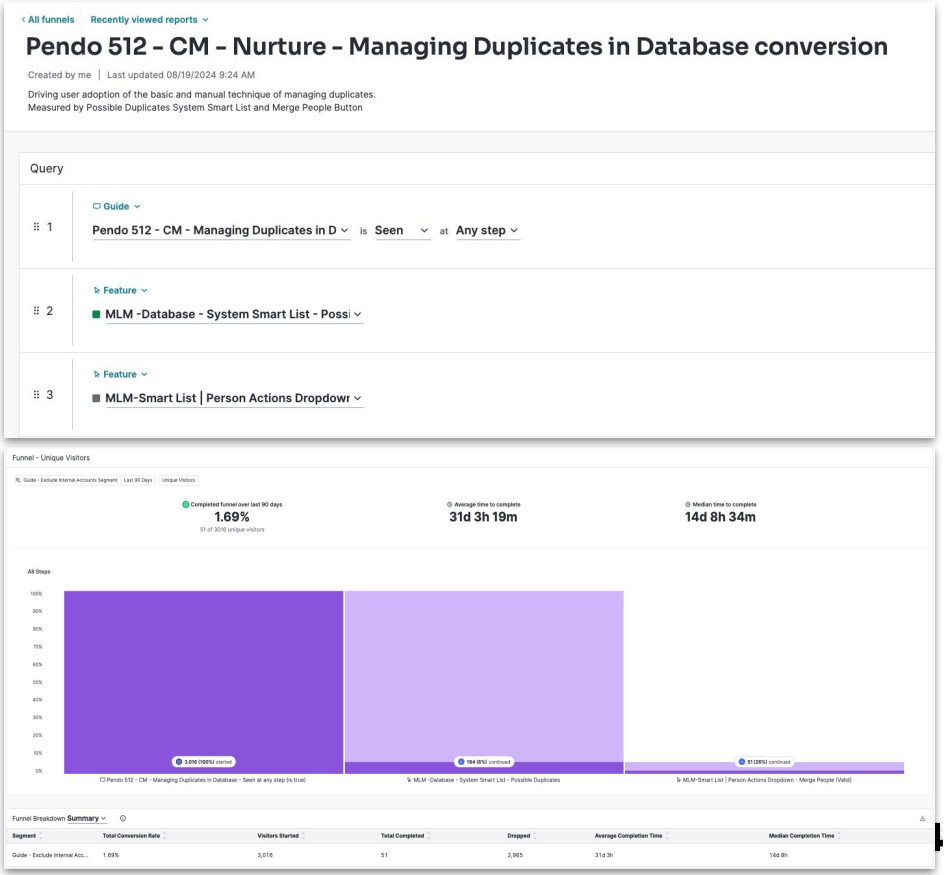
Set Guide Goals for a snapshot of progress

- **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

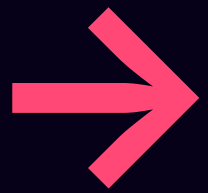
- Refine your targeting based on user behavior
- Reduce repetition and streamline optimization with nested segments

- 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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