



PENDO 
MONIUM
2024

PENDOMONIUM 2024

**Driving customer
outcomes through
personalized
experiences**





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Director, Education and Community
Pendo



RYAN PHILPOTT

Lead Education Manager, Digital
Pendo



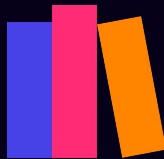
Pendo's Customer Education team bridges the gap between what's **possible** and **practical** through **sustainable learning**.



On demand + live learning



Peer-led discussions



Support documentation



User groups



Advocacy + recognition

3,000+
customers



8,000+
users per week

700+
new users daily





- Problem overview
- How we solve it

**How do we make it easier for
customers to reach their
outcomes as quickly as possible...**

...and at scale?

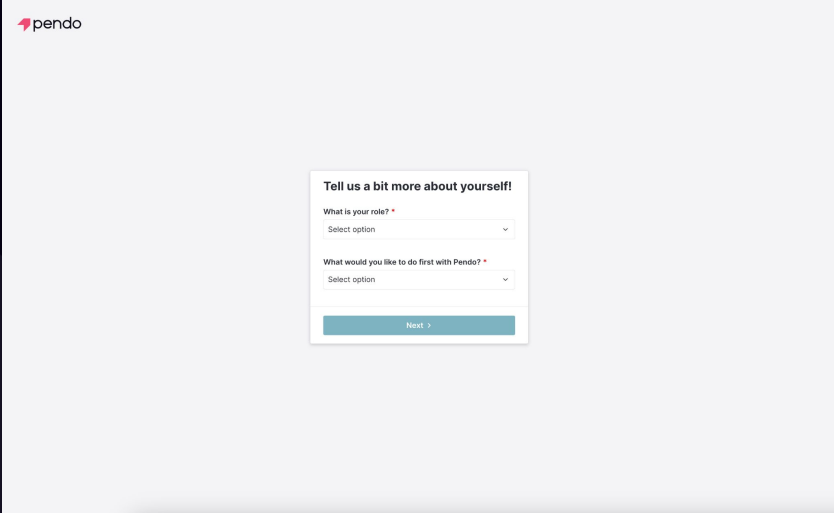
How we do it

- **Segment customers**
- **Define the ideal user journey**
- **Use tools to automate workflows**
- **Assess and iterate**



Segment customers

- **Persona**
- **Use case**
- **Permission / role**
- **Days since first login**



The screenshot shows a white rectangular form centered on a dark blue background. The form has the Pendo logo in the top left corner. The title of the form is "Tell us a bit more about yourself!". Below the title, there are two dropdown menus. The first is labeled "What is your role?" and the second is labeled "What would you like to do first with Pendo?". Both dropdown menus have "Select option" text below them. At the bottom of the form is a teal button with the text "Next >".

No metadata? No problem!



2017

What is your role?

Product Manager ▾

Submit

I want to...



Impact User Onboarding



Increase Product Feature Adoption



Improve Product Engagement



Understand User Sentiment

2019

2022

Welcome to Pendo!

Tell us the main reason you're here and we will give you some **inspiration** and **guidance** to get started!

Guide New Users

Increase Feature Adoption

Launch New Features

Measure Customer Health

Deflect Support Tickets

Convert Trials or Upsell

No thanks, I'd like to explore on my own.

Ask me later!

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Define the ideal customer journey



Processes to define

1

What are the required touchpoints?

What is the white glove experience?

What do we do when customers don't follow the "happy path"?

What are the known customer playbooks?

2

What content should we send, and when?

New user resources

Community events

Feature recommendations

3

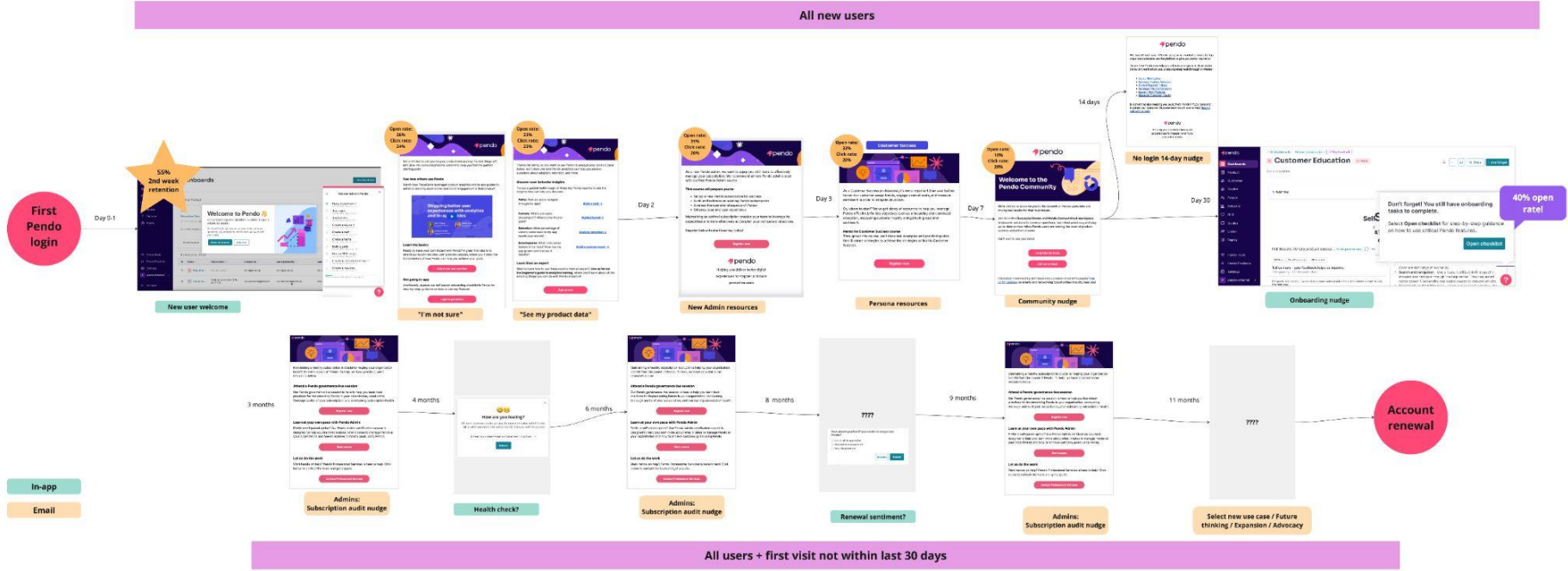
What other programs will we need optimize?

Customer communication gaps

Known risk factors

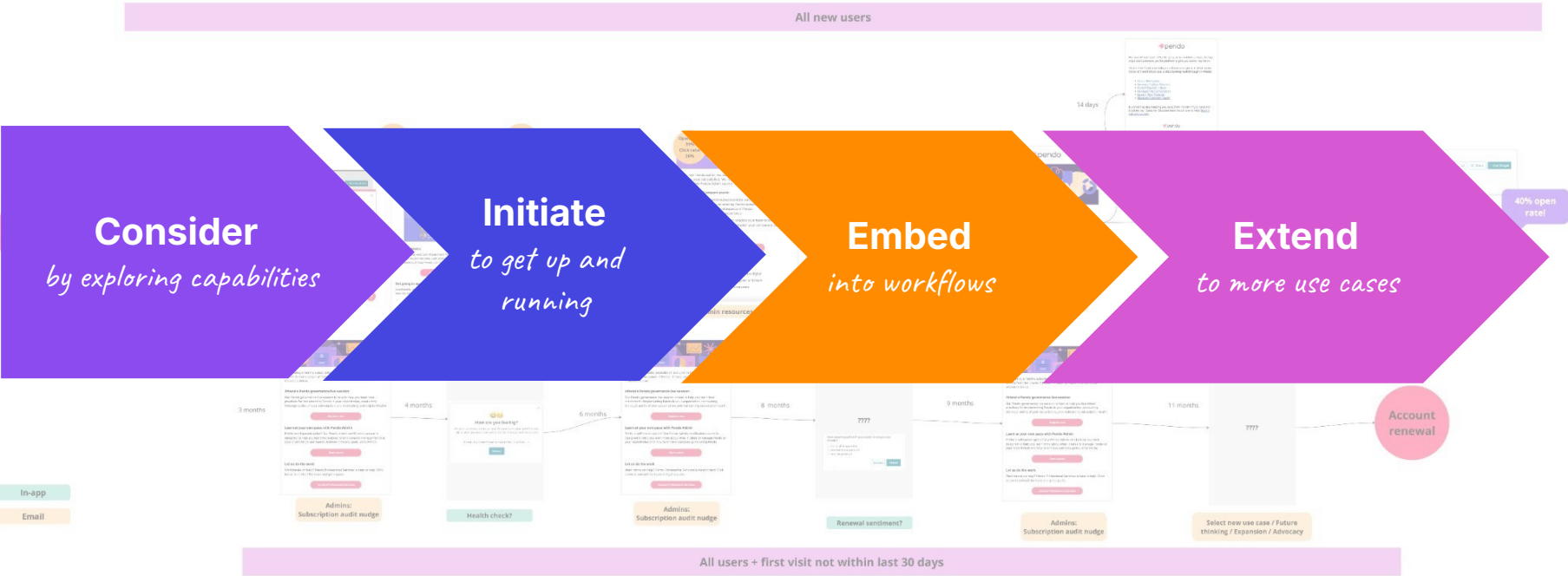
New product roll-outs

Plot the journey





Plot the journey





Use tools to automate workflows

Pendo is our foundation



You might be using...



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How it worked



Onboarding: Analytics use case

Created by erica@pendo.io
3 eligible visitors
Guide eligible

[Edit Segment](#) [Copy](#) [Trash](#)

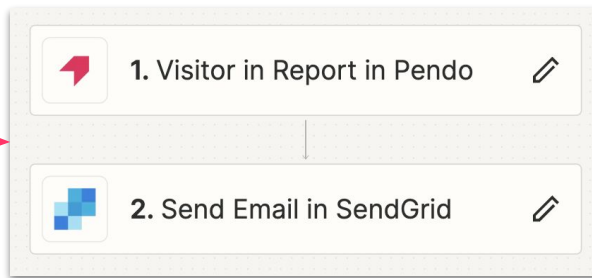
Eligible Visitors (3) **Details**

DESCRIPTION

Cohort of users who said "see my product data" was their job to be done.

SEGMENT RULES

- Identified Visitors Only
- First Visit within last 1 days
- AND
- use_case is equal to See my product data
- AND
- Account Type is equal to Paid Account/Direct Customer



zapier

The screenshot shows an email from Pendo in a Gmail inbox. The email content includes:

- Header: pendo
- Text: "Thanks for telling us you want to use Pendo to analyze your product data. Below, we'll show you how Pendo analytics can help you answer questions about adoption, retention, and more."
- Section: **Uncover user behavior insights**
- Text: "Try out a guided walkthrough of these key Pendo reports to see the insights they can help you discover."
- Section: **Paths:** How do users navigate through my app? [Build a path →](#)
- Section: **Funnels:** Where are users dropping off? Where's the friction point? [Build a funnel →](#)
- Section: **Retention:** What percentage of visitors come back to my app month over month? [Analyze retention →](#)
- Section: **Data Explorer:** What roles adopt feature X the most? How has my app grown over the last X months? [Build a custom report →](#)
- Section: **Learn from an expert**
- Text: "Want to learn how to use these reports from an expert? **Join us for our live beginner's guide to analytics training**, where you'll learn about all the amazing things you can do with Pendo analytics!"
- Button: [Sign up now](#)

SendGrid

Now, with Orchestrate



Built and segmented in Pendo!

Email

Persona: Customer Success


Add a description

Overview Settings

Days until next message

1 Day

Content



As a Customer Success professional, it's more important than ever before to monitor customer usage trends, engage users at scale, and measure sentiment in order to mitigate churn risk.

So, where to start? We've got plenty of resources to help you leverage Pendo effectively for key objectives such as onboarding and continued education, measuring customer health, and gathering customer sentiment.

Pendo for Customer Success course

Throughout this course, we'll show real examples and practical guides that illustrate strategies to achieve the strategies critical to Customer Success.

[Register now](#)

Pendo
301 Hillsborough Street, Raleigh, NC 27603
[Unsubscribe](#)

[Send a test email](#)

Gmail

Chantie Nguyen sha...

Julie Benjamin

Maddy Snyder

Zoom App Mar

Kinside

Calendly

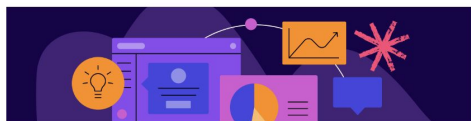
me, Adam 3

Laura Horton 3

Ke Lou (Jira) 2

Maddy Snyder

Skilljar Support



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301 Hillsborough Street, Raleigh, NC 27603
[Unsubscribe](#)

Skilljar Support ticket 57311 (Urgent) Pendo Admin - New Credly + Skilljar trigger for badge has been ma...

View results in Pendo!

Overview			
Total sends	Delivery rate	Unique open rate	Unique click rate
682	100% 679 out of 682 emails	59% 402 out of 682 emails	37% 254 out of 682 emails

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How we Pendo

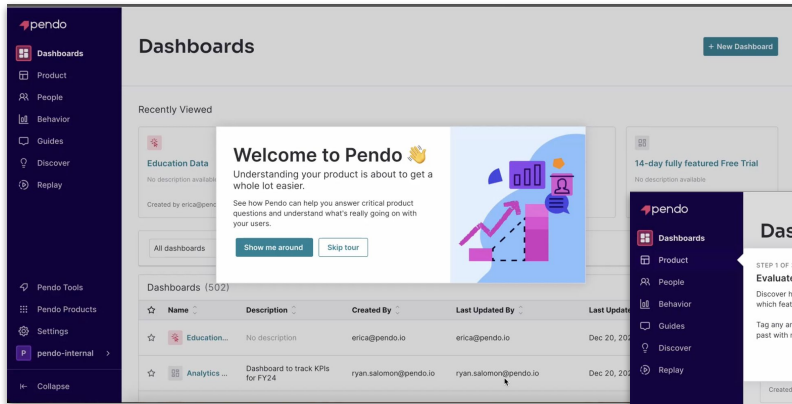


Consider
by exploring capabilities

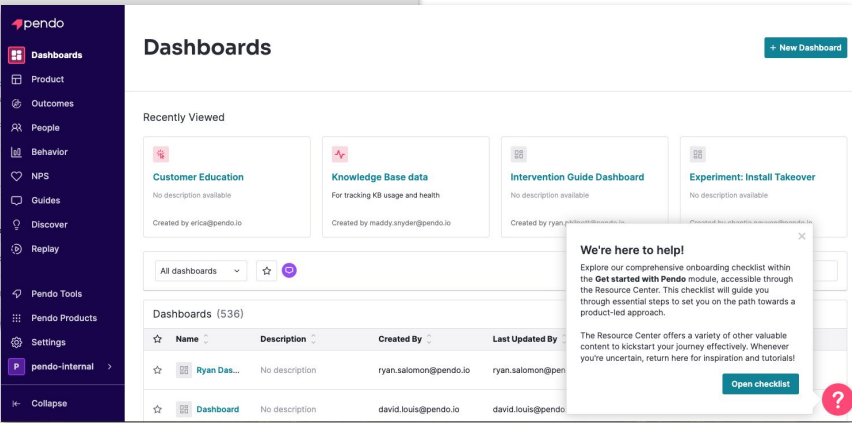
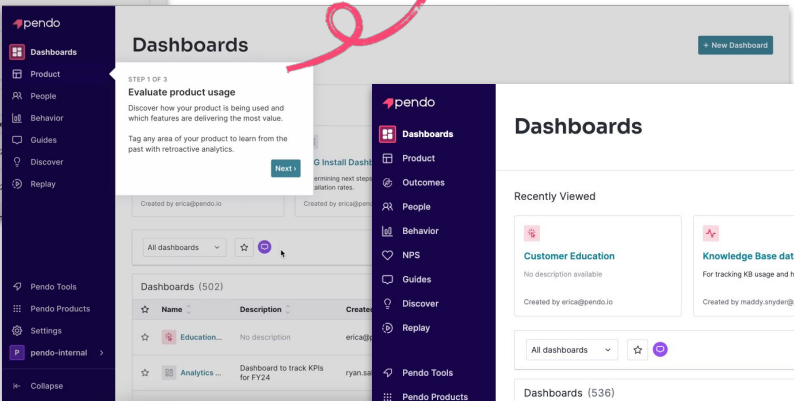
Initiate
to get up and running

Embed
into workflows

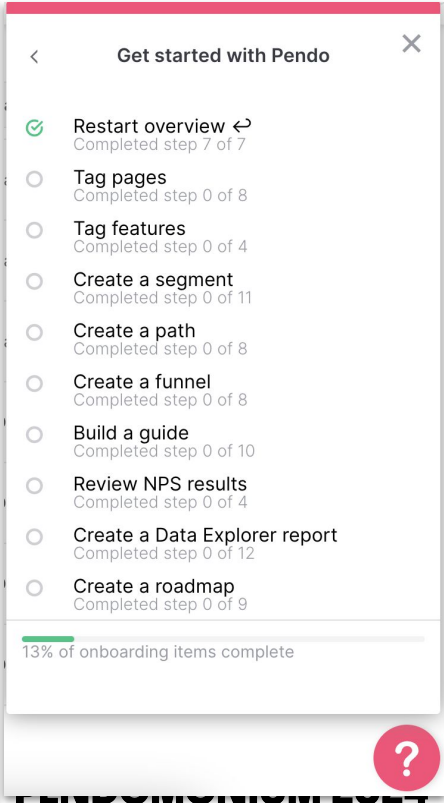
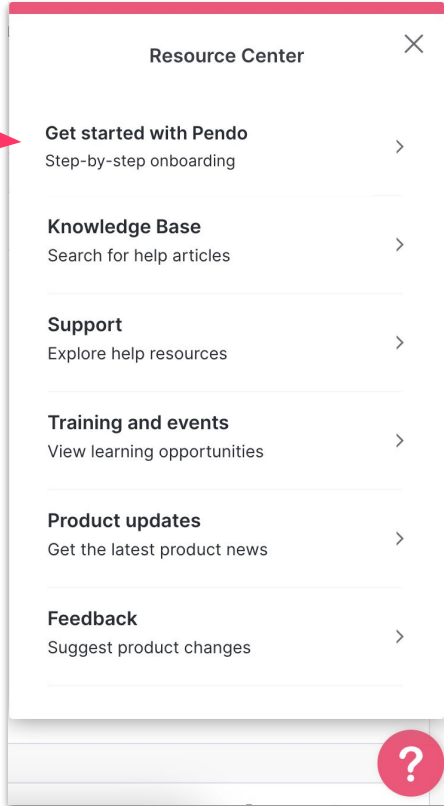
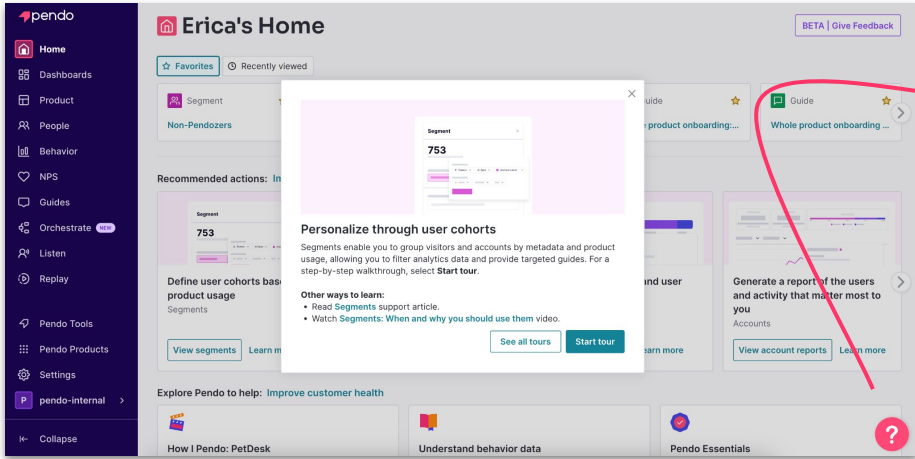
Extend
to more use cases



...63% of users skip the tour



Self-paced tour with high-level product overview.



Accommodate users based on their convenience and level of engagement.



Consider
by exploring capabilities

Initiate
to get up and running

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into workflows

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to more use cases



Use case = analytics



pendo

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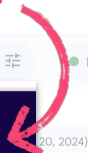
- Paths:** How do users navigate through my app? [Build a path →](#)
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*** Tailored learning based on initial questions at login.**

Persona = customer success



pendo

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[Register now](#)

MIUM 2024

Consider

by exploring capabilities

Initiate

to get up and running

Embed

into workflows

Extend

to more use cases



Expand knowledge and learning across other products.

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Results and impact

Highest retention on record



~54%

2nd week retention

Weekly visitors cohort retention

Cohort	Week 0 0-7 Days	Week 1 7-14 Days	Week 2 14-21 Days	Week 3 21-28 Days	Week 4 28-35 Days	Week 5 35-42 Days
Whole product onboard... 14,393 visitors	100%*	43%*	39%*	36%*	36%*	36%*
May 12 - May 18 5,681 visitors	100%	54%	52%	49%	46%	44%*
May 19 - May 25 5,631 visitors	100%	57%	53%	48%	46%*	34%*
May 26 - Jun 1 5,609 visitors	100%	58%	52%	48%*	33%*	
Jun 2 - Jun 8 6,375 visitors	100%	56%	50%*	37%*		
Jun 9 - Jun 15 6,243 visitors	100%	56%*	40%*			
Jun 16 - Jun 22 6,070 visitors	100%*	44%*				

14%
baseline

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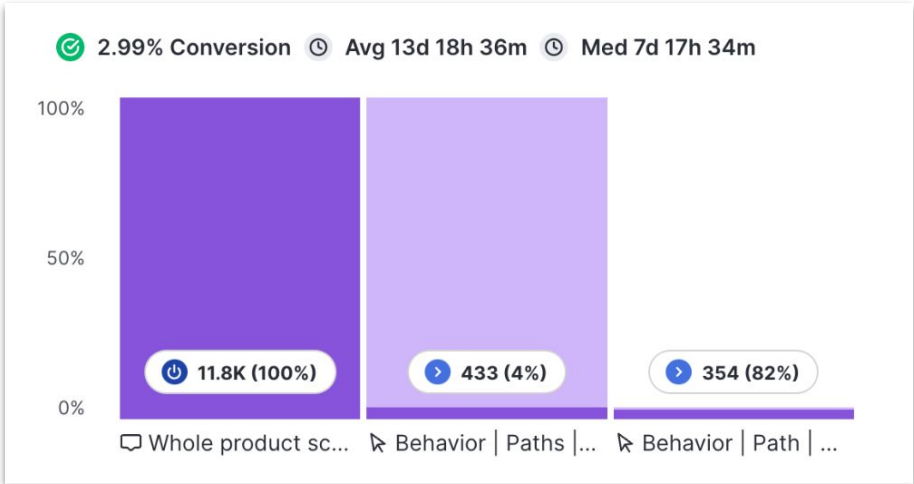
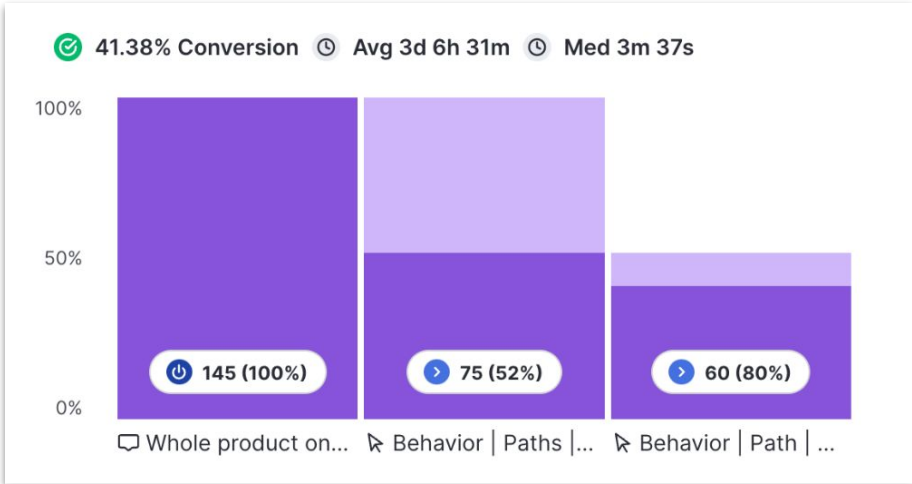
Key feature adoption



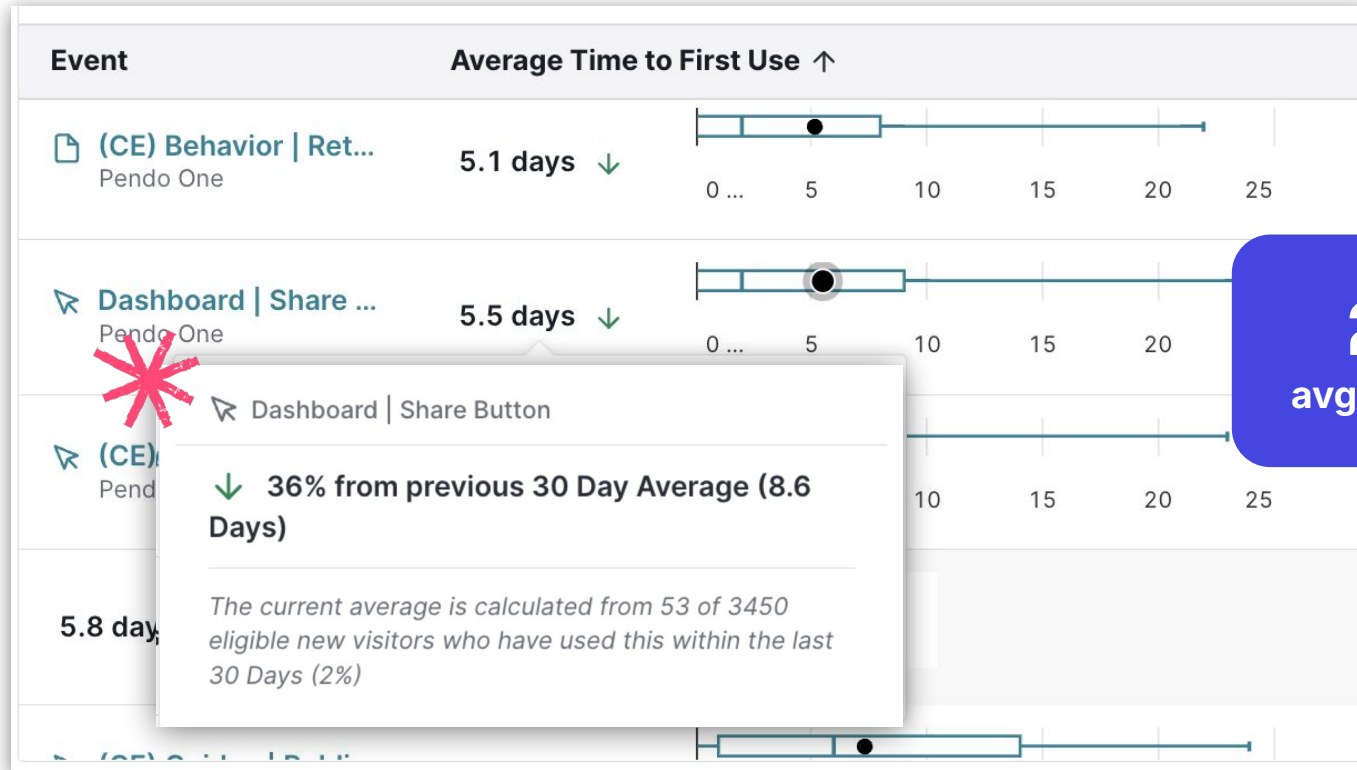
<12x conversion across all core events 🤖

✓ Engaged with Pendo guide

✗ Did not engage with Pendo guide



Reduction in time to first use



21%
avg reduction



Assess and iterate

Monitoring the user experience



Session Replay

Guide alerts to resolve issues quickly

Top Stats

3	0	0
Not Reviewed	Triage	Resolved



We're Listening!



The screenshot displays the Pendo Feedback views interface. On the left, a sidebar contains navigation options: Home, Dashboards, Pendo Tools, Pendo Products, Settings, pendo-internal, and Collapse. The main content area is titled "Feedback views" and includes a search bar and buttons for "Add feedback sources", "Submit feedback", and "Create new view".

A modal window titled "How do you feel about this onboarding experience?" is overlaid on the left. It contains two radio buttons: "I like it" and "Could be better", followed by a text input field and "Dimiss" and "Submit" buttons.

In the center, a card titled "Import guide polls" features a purple icon of a document with a checkmark and a red arrow pointing to it. The card text reads: "Import existing and future responses from your guide polls." Below the card is a teal button labeled "Import guide polls".

On the right, a "Feedback summary" panel for "Whol..." is shown. It includes a "Pendo AI" badge, a "View all insights" link, and a "Refresh" button. The summary lists three key feedback points:

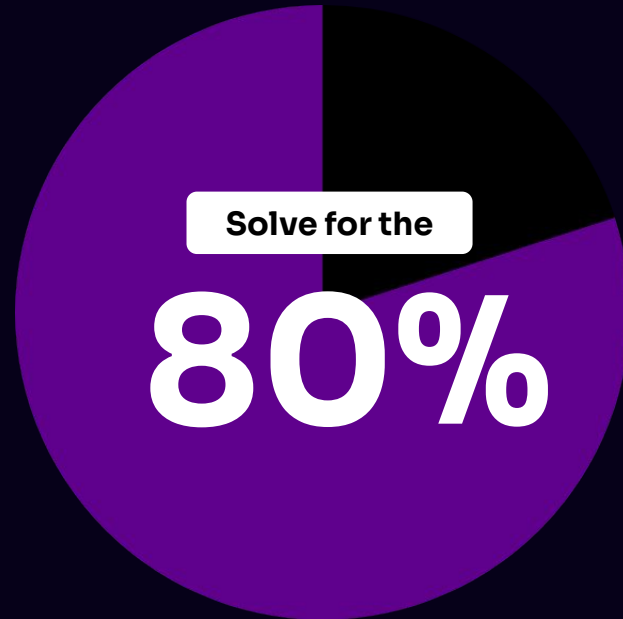
- Customization and segmentation** - Users want the onboarding guide to be tailored to their specific use cases and for certain features to be segmented based on user roles or needs. They suggest working with customer success to understand where customers see value and which areas they should focus on.
- User experience improvements** - Users have feedback on the onboarding checklist, such as the ability to start over if they get stuck. They also mention that the white notices to move between steps can get lost in the website-s whitespace and suggest making them optional or removable.
- Clarity and contextual onboarding** - Users would like more clarity on certain terms and concepts, such as the difference between a path and a funnel. They also suggest a more contextual onboarding experience when starting to use specific features.
- Broken onboarding tasks** - Some users mention that certain onboarding tasks, such as creating a roadmap or using the data

At the bottom of the interface, a table lists saved views:

Title	Items	Description	Created by	Last updated time
'Dashboard Templates Beta Feedback' feedback		Feedback captured via 'Dashboard Templates Bet...	khari.williams@pen...	Jul 15, 2024 10:12:06 AM EDT
API & Webhooks Feedback			cooper.triggs@p...	

Summary

1. Segment your users
2. Define the user journey
3. Automate with tools
4. Assess and iterate





Thank you!

Want to learn more about **Pendo Orchestrate**?

Stay for the next session
in Meymandi Hall!