



PENDO 
MONIUM
2024

PENDOMONIUM 2024

**Elevating enterprise
software to
SaaS standards**





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Agenda

- **Introduction**
- **Where we started**
 - Challenging warehouse software
 - Managed Implementations
 - Missing Success Metrics
- **The Problem with Onboarding**
- **Pendo's Solution**
 - Pendo's role in Onboarding
 - Measured success through track events and Pendo API
- **Our Results**
 - Key takeaways
 - Thoughts for other enterprises



Introduction

A little about RF-SMART



- B2B
- Traditional enterprise software
- Consulting and software solutions

Modernize Warehouse Inventory Operations

Powerful WMS & Barcode Scanning for Warehousing, Distribution, & Healthcare

Transform Your Warehouse

ORACLE + NETSUITE

ORACLE SCM Cloud

ORACLE JD EDWARDS

Microsoft Dynamics

40% Productivity Gains

99.9% Inventory Accuracy

3,000+ Successful Implementations



Where We Started

Starting with a **Story**...



Warehouse Shipping Software



- **Distinct, Disjointed User Personas**
- **Using software to move physical goods**
- **Physical goods accuracy is more important than software clicks**
- **You buy a t-shirt online, we help customers find that shirt in a warehouse and get it out the door to you**

Missing Metrics



- **Scans vs Clicks**
- **Fear of under-implemented customers**
- **3rd-party software woes**



Challenges Culminated in Customer Onboarding

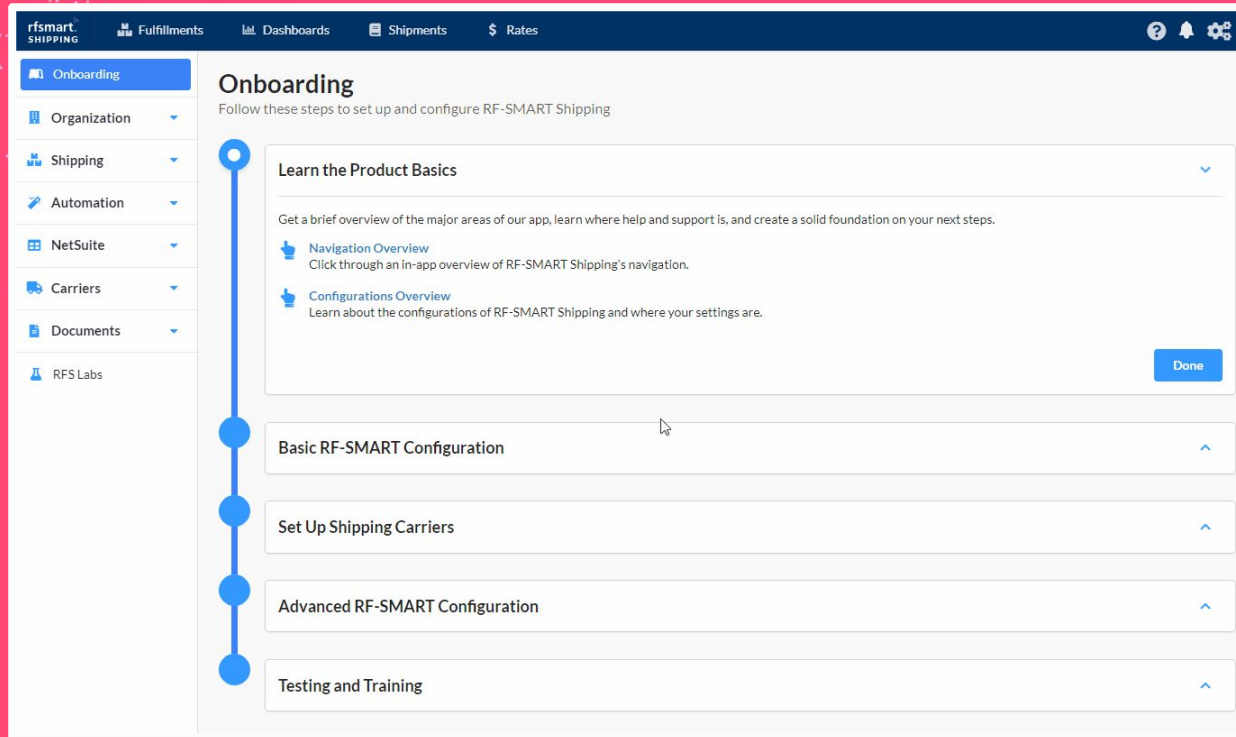
Pendo's Solution

Onboarding with Pendo



- **Built on Pendo's Guides**
- **Automated using Segments**
- **Monitoring using Track Events, Dashboards, and Replays**

Onboarding Guides



The screenshot displays the 'Onboarding' section of the RF-SMART SHIPPING application. The interface includes a top navigation bar with 'rfsmart SHIPPING' and menu items for 'Fulfillments', 'Dashboards', 'Shipments', and 'Rates'. A left sidebar lists various application areas: 'Onboarding', 'Organization', 'Shipping', 'Automation', 'NetSuite', 'Carriers', 'Documents', and 'RFS Labs'. The main content area is titled 'Onboarding' and provides instructions to follow steps for setting up and configuring the application. A vertical progress indicator on the left shows the current step, 'Learn the Product Basics', which is highlighted with a blue circle. Below this, a list of steps is shown, each with a chevron icon indicating its status: 'Learn the Product Basics' (expanded), 'Basic RF-SMART Configuration', 'Set Up Shipping Carriers', 'Advanced RF-SMART Configuration', and 'Testing and Training'. The 'Learn the Product Basics' step includes a sub-section for 'Get a brief overview of the major areas of our app...' and two sub-tasks: 'Navigation Overview' and 'Configurations Overview'. A 'Done' button is visible at the end of the first step.

rfsmart SHIPPING Fulfillments Dashboards Shipments Rates

Onboarding

Follow these steps to set up and configure RF-SMART Shipping

Learn the Product Basics

Get a brief overview of the major areas of our app, learn where help and support is, and create a solid foundation on your next steps.

- Navigation Overview**
Click through an in-app overview of RF-SMART Shipping's navigation.
- Configurations Overview**
Learn about the configurations of RF-SMART Shipping and where your settings are.

Done

Basic RF-SMART Configuration

Set Up Shipping Carriers

Advanced RF-SMART Configuration

Testing and Training

Guides - New Page

rfsmart SHIPPING Fulfillments Dashboards Shipments Rates

Home Onboarding Organization Shipping Automation NetSuite Carriers Documents RFS Labs

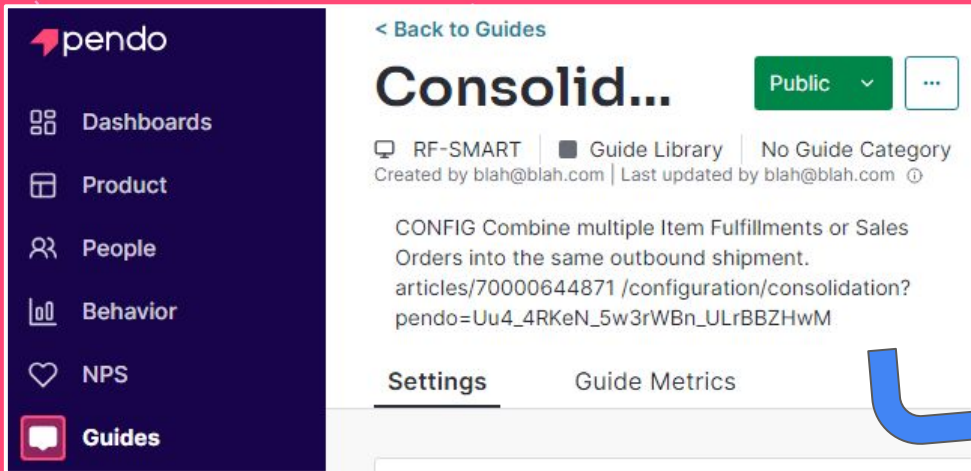
Onboarding

Follow these steps to set up and configure RF-SMART Shipping

- Learn the Product Basics
- Install the SuiteApp
- Basic RF-SMART Configuration
 - Users
 - User Tutorial
Follow this guide to create a new user.
 - Read the Help
Read through our Help article on adding a new user.
 - Shipping Addresses
 - Fulfillment Step Templates
 - Printers and Documents
 - Shipping Stations
 - Box Types
 - Shipment Methods

Done

Guide Library



pendo

- Dashboards
- Product
- People
- Behavior
- NPS
- Guides**

[Back to Guides](#)

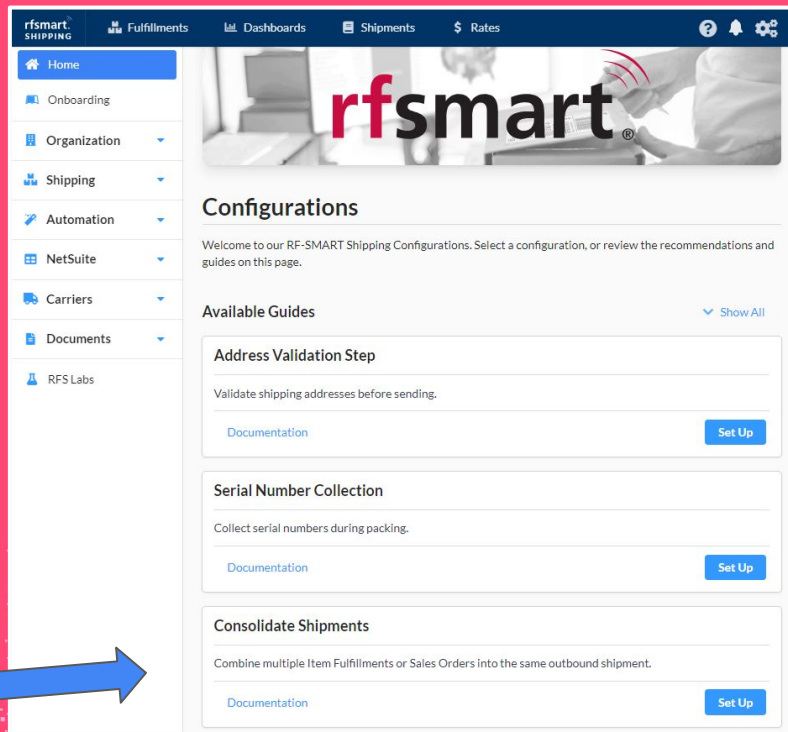
Consolid...

Public

RF-SMART | Guide Library | No Guide Category
Created by blah@blah.com | Last updated by blah@blah.com

CONFIG Combine multiple Item Fulfillments or Sales Orders into the same outbound shipment.
articles/70000644871 /configuration/consolidation?
pendo=Uu4_4RKeN_5w3rWBn_ULrBBZHwM

Settings | Guide Metrics



rfsmart SHIPPING | Fulfillments | Dashboards | Shipments | Rates

- Home
- Onboarding
- Organization
- Shipping
- Automation
- NetSuite
- Carriers
- Documents
- RFS Labs

Configurations

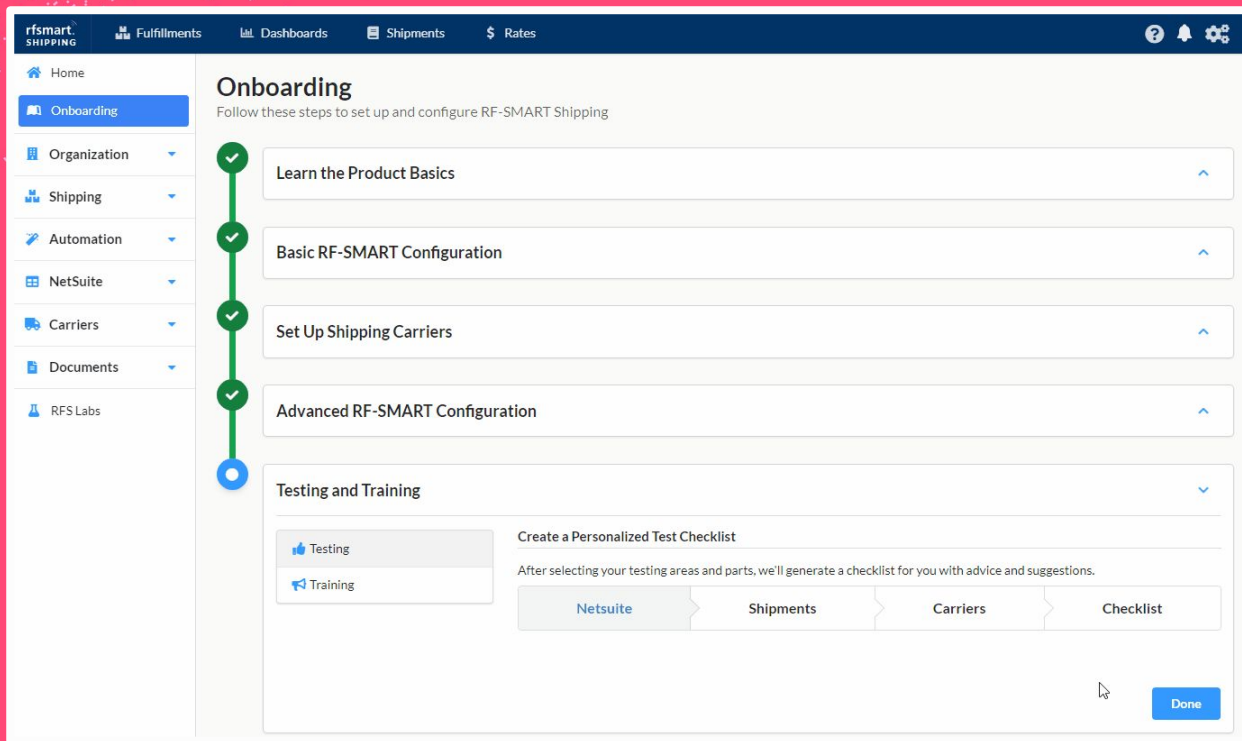
Welcome to our RF-SMART Shipping Configurations. Select a configuration, or review the recommendations and guides on this page.

Available Guides

Show All

- Address Validation Step**
Validate shipping addresses before sending.
[Documentation](#) [Set Up](#)
- Serial Number Collection**
Collect serial numbers during packing.
[Documentation](#) [Set Up](#)
- Consolidate Shipments**
Combine multiple Item Fulfillments or Sales Orders into the same outbound shipment.
[Documentation](#) [Set Up](#)

Onboarding Graduation



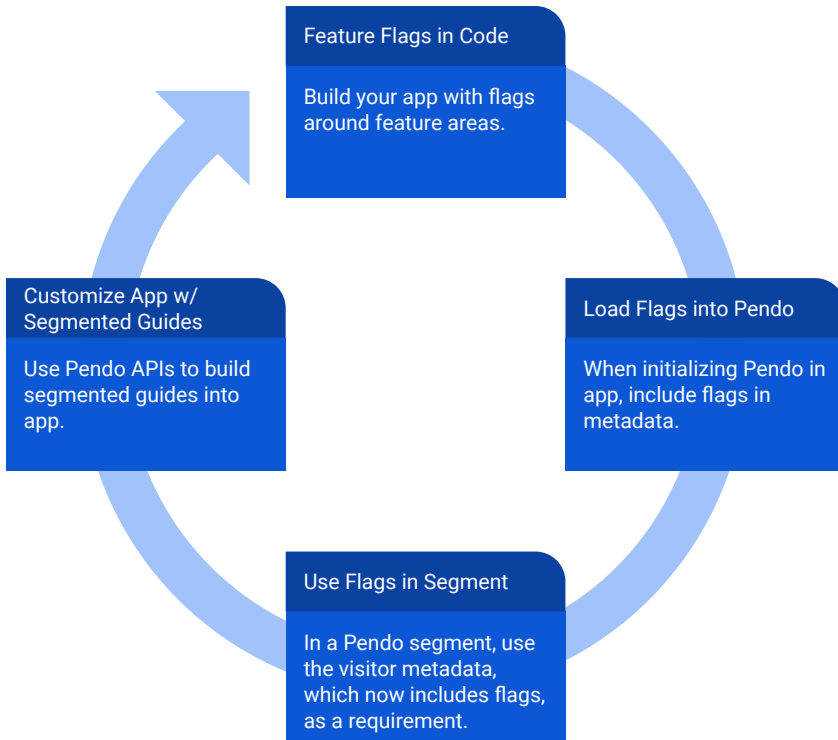
The screenshot displays the 'Onboarding' section of the RF-SMART SHIPPING application. The interface includes a top navigation bar with 'Fulfillments', 'Dashboards', 'Shipments', and 'Rates'. A left sidebar lists various menu items: Home, Onboarding (selected), Organization, Shipping, Automation, NetSuite, Carriers, Documents, and RFS Labs. The main content area is titled 'Onboarding' and contains a progress bar with five steps: 'Learn the Product Basics', 'Basic RF-SMART Configuration', 'Set Up Shipping Carriers', 'Advanced RF-SMART Configuration', and 'Testing and Training'. The first four steps are marked with green checkmarks, while the fifth is marked with a blue circle. Below the progress bar, the 'Testing and Training' section is active, featuring a 'Create a Personalized Test Checklist' form with a 'Testing' button and a 'Training' button. The form includes a breadcrumb trail: 'Netsuite > Shipments > Carriers > Checklist'. A 'Done' button is located at the bottom right of the form.

How We Built It



- **Use of Pendo APIs for custom in-app experience**
- **Authentication integration to protect PII**
- **Beta testing and tight feedback loop with customers**

Example Segment Using Feature Flags



Initializing Pendo w/ Feature Flags

```
const FeatureFlags = Object.entries({ ...flags }).reduce(
  (obj, [key, value]) => {
    return {
      ...obj,
      [`${key}`]: value,
    };
  },
  {}
);

window.pendo?.initialize({
  visitor: {
    id: userHash,
    initials: user.nickname || 'Missing Initials',
    roleName: self.roleName,
  },
  account: {
    id: self.customerId,
    ...FeatureFlags,
  }
});
```



Generic Track Event Function

```
const pendoTrackEvent = (name: string, payload?: pendoType.Metadata) => {
  try {
    window.pendo?.track(name, payload);
  } catch (e) {
    ApiAxios.recordError({
      name: 'Track Event',
      message: `Error caught when attempting to send ${name} Event`,
      cause: e,
    });
    // do nothing in case track is unavailable
  }
};
```

Example Track Event Usage

Using Function in Business App

```
pendoTrackEvent('Shipment Created', payload);

if (timeInSeconds <= time) {
  pendoTrackEvent('Shipped Under Time');
}

if (state.clickAmount > 0) {
  pendoTrackEvent('Shipped With Click', { clickAmount: state.clickAmount });
} else {
  pendoTrackEvent('Shipped Without Click');
}
```




Our Results

Customer **Onboarding** Now



- **Automated kickoff and in-app orientation**
- **Pendo Orchestrate for new user journey**
- **Faster implementation time for customers**
- **In-app solution creates a less-costly entry point for customers**

Key Takeaways

- **Pendo Replays are critical to digital product management**
- **What we built for customers helps our employees too**
- **Use Guides to prevent tech debt.**
- **Partnership on Product team is essential.**
- **Pendo saved us from building Pendo**



Q&A



Thank you!

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