



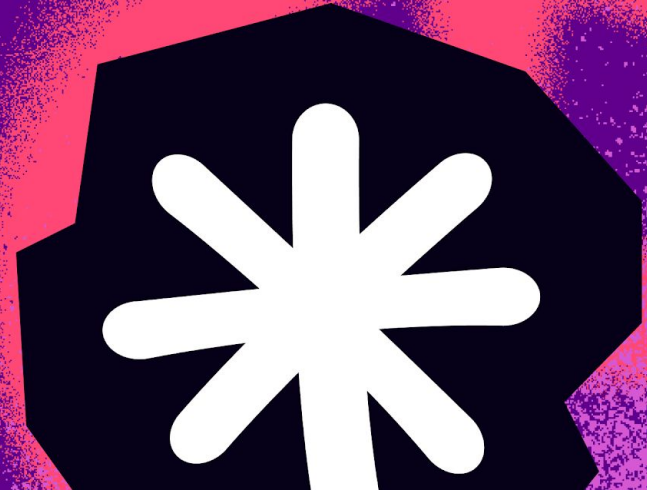
**PENDO**   
**MONIUM**  
**2024**

# PENDOMONIUM 2024

## From concept to conversion:

How customer marketing and product management drive PLG success

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# Today's Speakers



**Carly Cornforth**

Senior Manager, Customer  
Marketing  
**CallRail**



**Sarah Parham**

Associate  
Product Manager  
**CallRail**



## About CallRail

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CallRail is an **AI-powered lead intelligence platform** that makes it easy for businesses of all sizes to market with confidence and turn **leads** into even **better customers** .



# What to expect from this session

- How CallRail leverages Pendo to drive PLG, focusing on in-app customer expansion
- 3-pronged approach to in-app marketing and how to apply it to your business
- Real-life examples of successful Pendo guides
- Do's and don'ts of cross-selling and upselling in your application
- ...and a lot of fun along the way



**PENDOMONIUM 2024**

# 🎵 Blank Space 🎵

Prior to launching Pendo in 2020, cross-sell and upsell revenue was not a predictable source of revenue for our business.

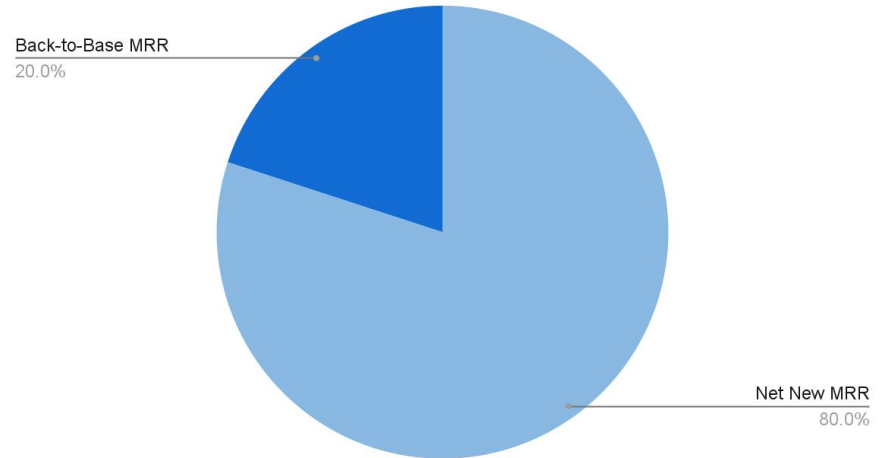


# Where are we now?



With a thoughtful GTM strategy and Pendo as a primary channel, our back-to-base expansion revenue accounts for about 20% of the business's new monthly recurring revenue.

CallRail's Monthly Recurring Revenue





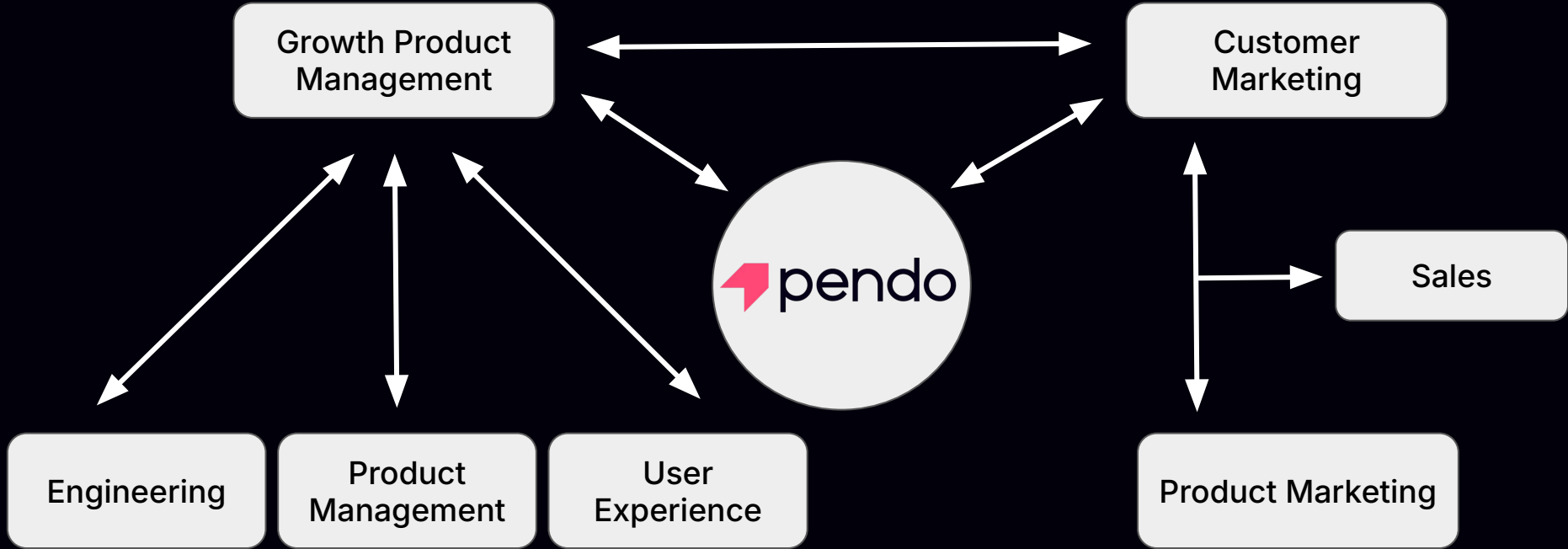
# 🎵 Enchanted 🎵

Our product, customer marketing, and sales teams came together under a single goal:

**Driving trials and upgrades for our suite of additional products.**

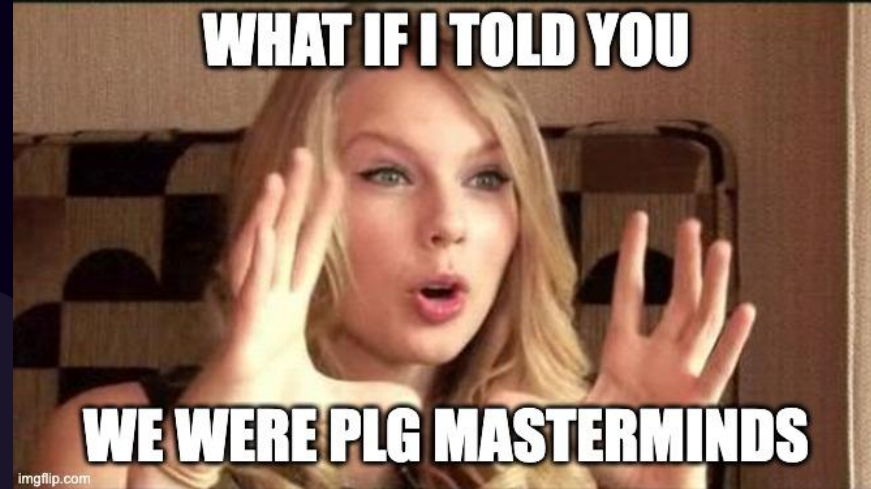


# The players at CallRail



# 🎵 Mastermind 🎵

We created a 3-pronged approach to cross-selling and upselling in our application.

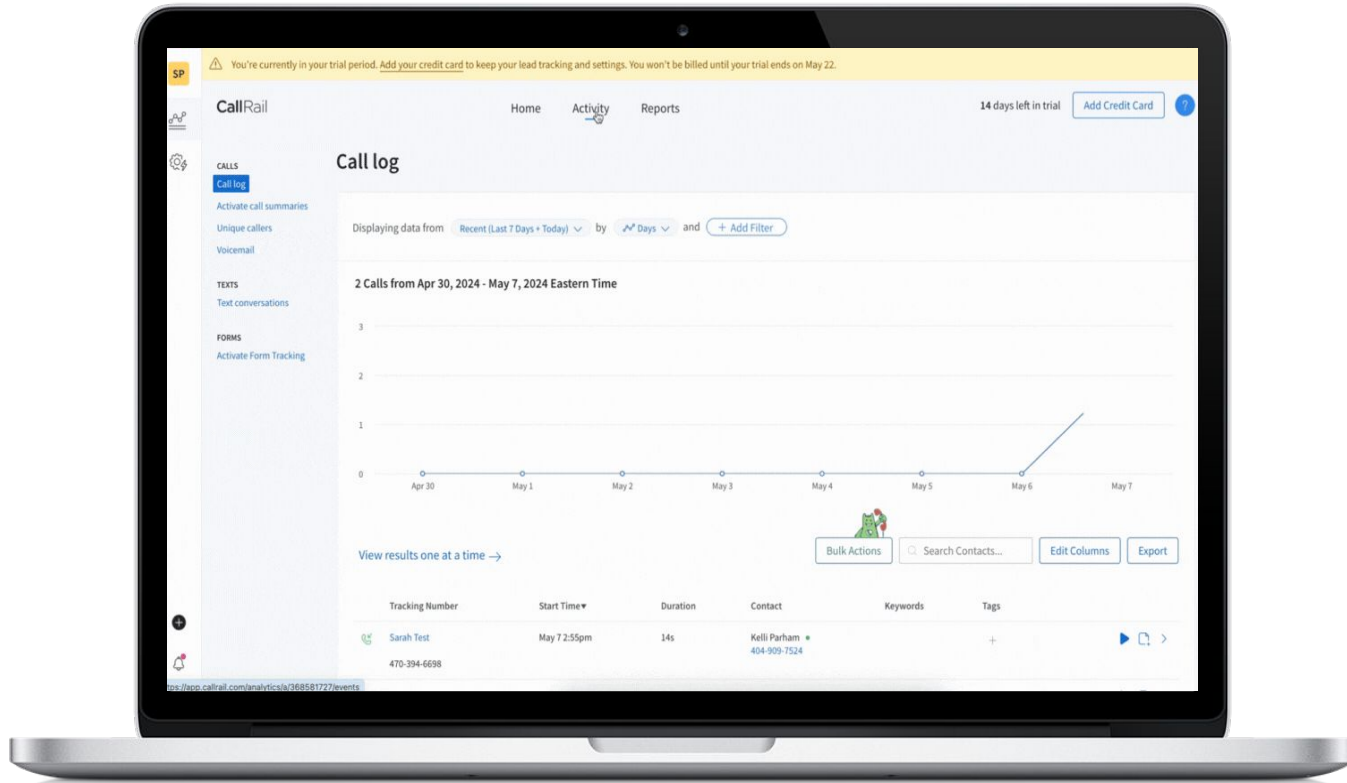


# Strategy 1: In-App Contextuals



A mixture of **hard-coded experiences** and **Pendo in-app guides** that make it easy for users to add a product to their subscription right when they're trying to do a task that a specific product could help with or solve.

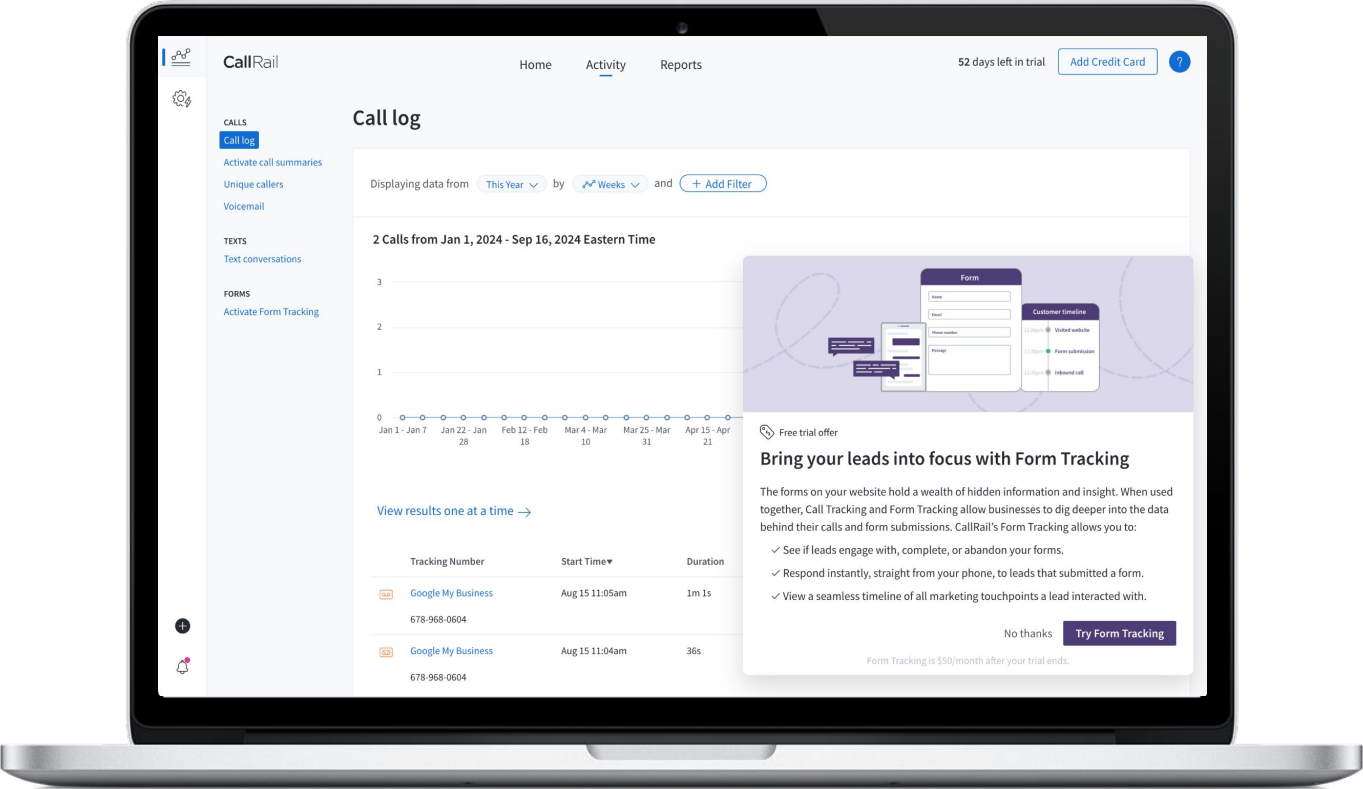
# In-App Transcripts Contextual



## Strategy 2: Customer Lifecycle-based Guides

Customer lifecycle-based prompts target users where they are in their journey with CallRail; we promote additional products via in-app Pendo guides that are surfaced based on their specific needs and current usage.

# Lifecycle-Based Guide



CallRail Home Activity Reports 52 days left in trial [Add Credit Card](#)

**CALLS**  
[Call log](#)  
Activate call summaries  
Unique callers  
Voicemail

**TEXTS**  
Text conversations

**FORMS**  
[Activate Form Tracking](#)

### Call log

Displaying data from This Year by Weeks and [+ Add Filter](#)

2 Calls from Jan 1, 2024 - Sep 16, 2024 Eastern Time

3  
2  
1  
0

Jan 1 - Jan 7 Jan 22 - Jan 28 Feb 12 - Feb 18 Mar 4 - Mar 10 Mar 25 - Mar 31 Apr 15 - Apr 21

[View results one at a time →](#)

Tracking Number	Start Time	Duration
Google My Business 678-968-0604	Aug 15 11:05am	1m 1s
Google My Business 678-968-0604	Aug 15 11:04am	36s

#### Free trial offer

### Bring your leads into focus with Form Tracking

The forms on your website hold a wealth of hidden information and insight. When used together, Call Tracking and Form Tracking allow businesses to dig deeper into the data behind their calls and form submissions. CallRail's Form Tracking allows you to:

- ✓ See if leads engage with, complete, or abandon your forms.
- ✓ Respond instantly, straight from your phone, to leads that submitted a form.
- ✓ View a seamless timeline of all marketing touchpoints a lead interacted with.

No thanks [Try Form Tracking](#)

Form Tracking is \$50/month after your trial ends.

# Strategy 3: Campaign-Based Guides



One-off, in-app, campaign-based guides focused on any promotions we are running or campaigns that fuel our specific monthly revenue goals.



# Campaign-Based Guides



The screenshot displays the CallRail interface. At the top, there are navigation links for Home, Activity, and Reports, along with a trial status indicator '52 days left in trial' and an 'Add Credit Card' button. The main content area is titled 'Call log' and shows a filter for 'This Year' by 'Weeks'. A chart indicates '2 Calls from Jan 1, 2024 - Sep 16, 2024 Eastern Time'. Below the chart is a table with columns for Tracking Number, Start Time, and Duration. A testimonial overlay from Tom Gonzales of Ohana Dental Implant Centers is positioned over the right side of the dashboard, featuring a quote about AI-generated summaries and a 'Read the story' button.

**Call log**

Displaying data from **This Year** by **Weeks** and **+ Add Filter**

**2 Calls from Jan 1, 2024 - Sep 16, 2024 Eastern Time**

View results one at a time →

Tracking Number	Start Time	Duration
Google My Business 678-968-0604	Aug 15 11:05am	1m 1s
Google My Business	Aug 15 11:04am	36s

**“Because of the accuracy of the AI-generated summaries, it now takes a third of the time to review, sort, and categorize our calls.”**

Tom Gonzales, Ohana Dental Implant Centers

**How Ohana Dental fell in love with AI insights**

Ohana's passion for innovation and patient satisfaction led them to experience a love-at-first-sight moment with CallRail's powerful AI features. Now, the team can effortlessly review, categorize, and escalate calls while uncovering valuable keywords and insights — helping to hone their marketing strategies and improve patient communication.

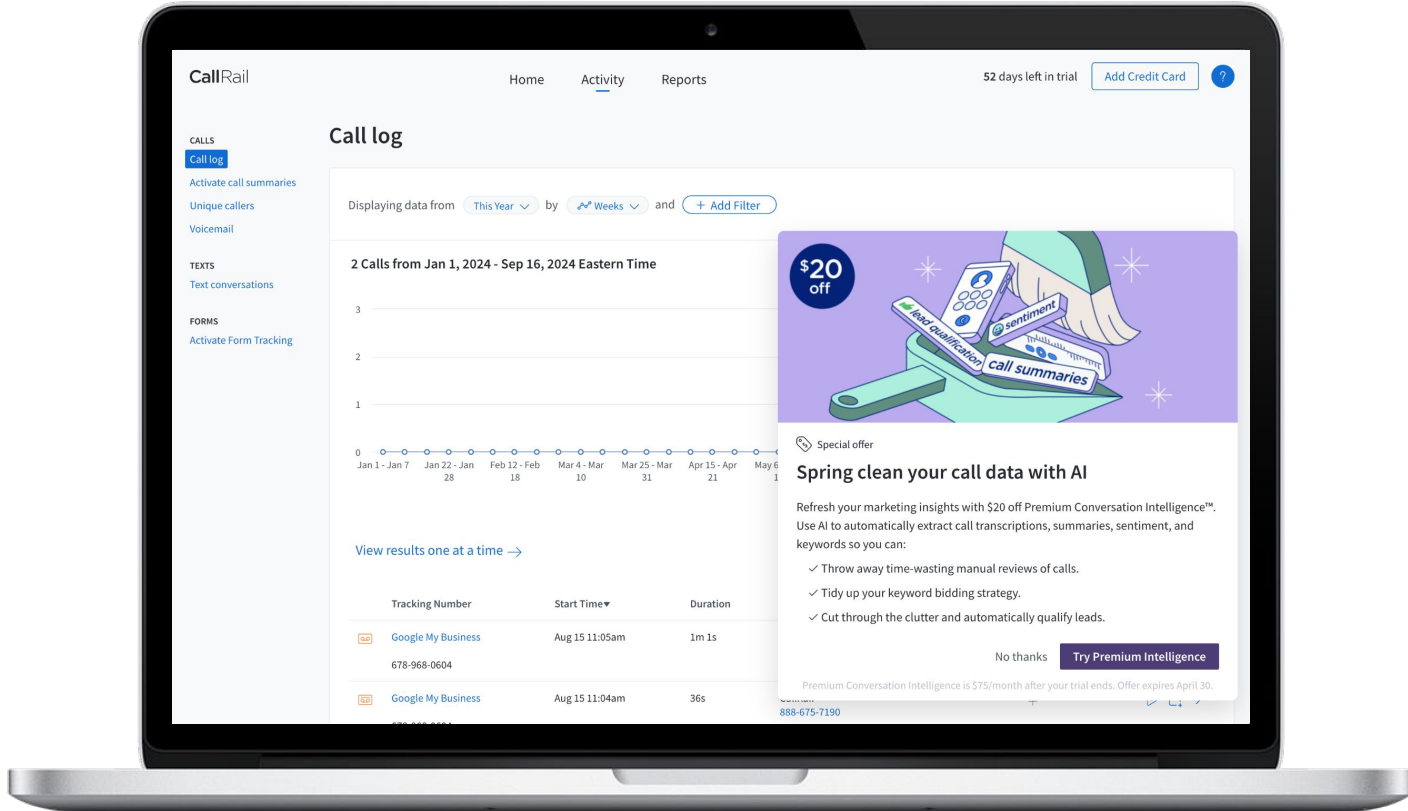
Discover your perfect AI match with a 14-day free trial of Premium Conversation Intelligence.

No thanks [Read the story](#) [Try Premium Intelligence](#)

Premium Conversation Intelligence is \$95/month after your trial ends.

888-675-7190

# Campaign-Based Guides





# The Execution

Customer marketing and Product Management create a strategy for a new project/promotion.

## UX Design

- Researches user personas
- Advises on UI
- Supports new user flows

## Engineering

- Passes data into Pendo
- Guide personalization
- JS custom event listeners

# 🎵 Back to December 🎵

Test

Learn

Iterate





## DO

- A/B Test
- Guide Throttle
- Metadata
- Themes
- Segmentation/Data Inputs
- Lead Score
- One-click trials

## DON'T

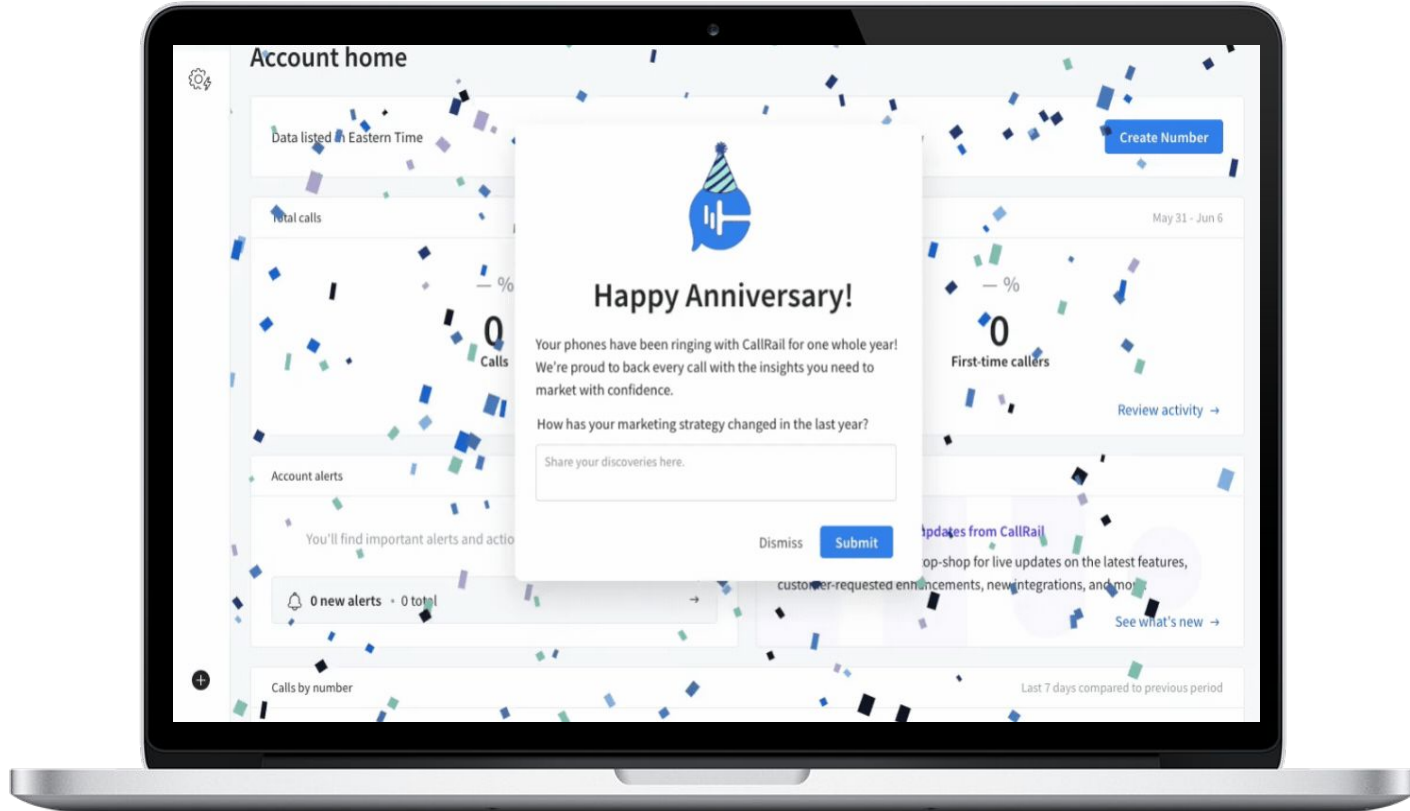
- CTA's that drive users out of the app (unless you have to)
- Rinse and repeat the same message over and over
- Lose sight of the voice of your app with long, wordy messages
- Spray and pray

# ♪♪ Sparks Fly ♪♪

We've developed milestones that continue to make our marketing more targeted, delightful, and poised for conversion.



# Anniversary Pendo Guide



# Spotify Wrapped-Inspired Campaign





♪♪ I can do it with a  
broken heart ♪♪

With a proven track record of what works, we were able to apply learnings, A/B test, and create a successful in-app contextual for a new product launch.



**PENDOMONIUM 2024**

# Convert Assist Cross-Sell Contextual



The screenshot shows the CallRail interface for a customer named Sarah Parham. The interface includes a sidebar with navigation options like 'CALLS', 'TEXTS', and 'FORMS'. The main content area displays the customer's profile, including their phone number (404-909-7524), location (Atlanta, GA), and a 'Lead journey overview' section. A 'Discover Convert Assist' overlay is positioned on the right side of the screen, featuring a 'Try Convert Assist' button and a list of benefits.

**Discover Convert Assist**

Unlock actionable insights from every conversation, streamline personalized follow-ups, and boost lead conversion with our latest AI-powered tools:

- ✓ **Action plans:** Generate the next best steps to take based on your previous conversations with the lead.
- ✓ **Smart follow-up:** Automatically draft customized email responses for faster re-engagement.
- ✓ **Call coaching:** Improve conversations for better customer experience and increased lead conversion.

[Try Convert Assist](#)

Convert Assist is \$30/mo after your 14-day trial ends.

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# Takeaways

- Align teams for a unified product-led GTM strategy, driving expansion through in-app messaging.
- Use in-app guides to target cross-sell/upsell opportunities based on product usage, behavior, and lifecycle data.
- Segment users with synced metadata to deliver timely, relevant messages.
- Customize Pendo guides with branded themes for consistent user experiences.
- Personalize guides with user data and celebrate customer milestones to boost loyalty.



**Thank you!**

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