

Pendo Launch Services

Onboarding Approach

The Pendo Launch implementation approach is designed to assist customers with installing Pendo on 1-2 product applications (based on the package size selected), and enabling users on core functionality that is available within your Pendo subscription. It also provides operational guidance to maintain and manage Pendo across your organization, while achieving key business objectives. Our Professional Services Consultants and Project Managers will be assigned to lead the implementation, using an proven approach that leverages Pendo's Product-Led best practices and techniques.

Pendo's Launch packages each contain a fixed number of sessions. Sessions will be one hour in duration unless otherwise specified. For larger packages, flexibility of these sessions is built into the design, allowing for greater focus on particular product areas, related to the modules of Pendo software purchased. Each program will have a combination of required and flexible sessions, which collectively are Pendo's "Professional Services."

Package Options

The table below outlines the included activities for the package levels available. A "✓" indicates that a resource or session is available at the package level purchased.

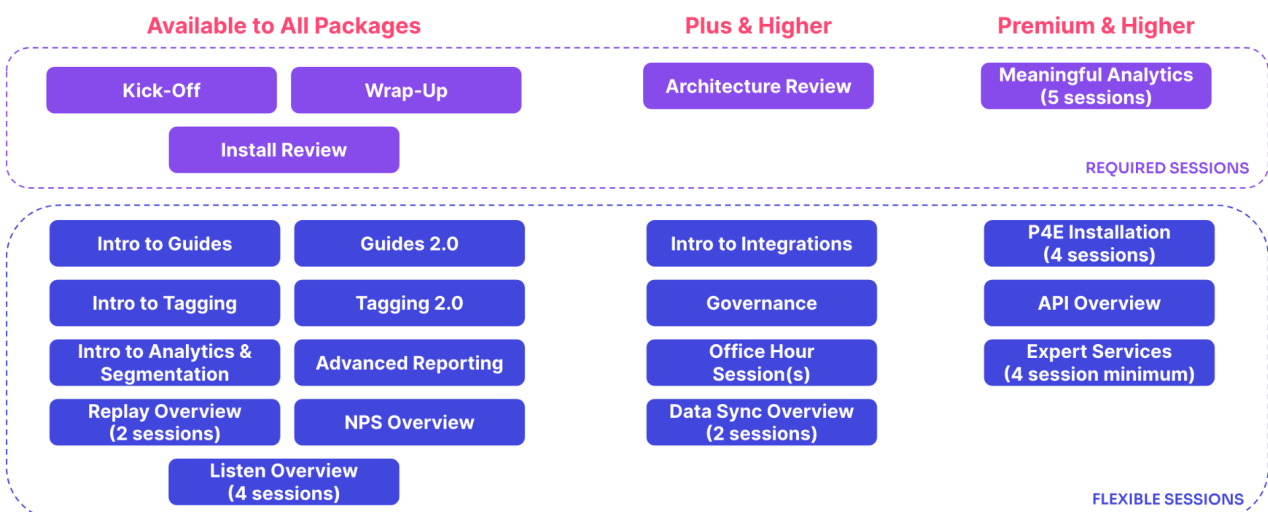
Package Details	Getting Started	Launch	Launch Plus	Launch Premium	Launch Ultimate
Project Resourcing					
Assigned Pendo Consultant	✓	✓	✓	✓	✓
Assigned Pendo Project Manager				✓	✓
(Optional) Assigned Professional Services Engineer				✓	✓
Available Sessions					
Total Count of Sessions (Up to number)	4	7	11	18	31
Project Kickoff	Required	Required	Required	Required	Required

Package Details	Getting Started	Launch	Launch Plus	Launch Premium	Launch Ultimate
Installation Review (1 session per application in scope. If deployed via browser extension, this will consume the equivalent of 4 sessions total, regardless of the number of applications in scope)	Required	Required	Required	Required	Required
Module-Specific Training & Enablement	✓	✓	✓	✓	✓
Architecture Review			Required	Required	Required
Pendo Governance			✓	✓	✓
Office Hours Consultation				✓	✓
Hands-on-Keyboard Support for Tagging, Guide Building, or Analytics				✓	✓
Wrap-up	Required	Required	Required	Required	Required
Project Timelines					
Number of Applications in Scope	1	1	2	1	2
Estimated project duration	4 weeks	8 weeks	12 weeks	20 weeks	32 weeks

Session Catalog Overview

Available Sessions per Package Type

The size of the package purchased will unlock additional, more advanced session types that can be woven into the implementation program design:



Required Session Catalog Details

Session	Description
Kick-Off [Required]	An introduction to your Pendo Implementation Team, and overview of the program design recommended to drive towards successful outcomes
P4C Install Review [Required per application generating P4C MAU]	Required for JavaScript snippet or mobile SDK Pendo Installations. A Pendo Consultant will review your Pendo installation to ensure that all analytics event data will be captured, the Pendo Designer can be launched, and that all configured metadata is being sent in the appropriate format.
P4E Installation [4 Sessions]	<p>Required only if deploying Pendo via browser extension. Can cover any number of browser-extension deployed applications.</p> <p>A Pendo Consultant will provide structured guidance on the topic of rolling out a managed browser extension deployment to your employees. They will discuss the technical requirements and process for how to install Pendo for B2E use cases, in order to show Pendo Guides and collect analytics on third party vendor platforms within your organization.</p>
Architecture Review [Required for Plus & Higher packages]	A Pendo Consultant will work with the Champion, Analyst, and Engineering stakeholders to ensure that any metadata necessary to tell the desired outcome stories with Pendo is being passed through the Pendo Installation. Will assist with mapping out data requirements across systems to ensure Pendo is well-integrated into a data ecosystem.
Meaningful Analytics [5 Sessions] [Required for Premium & Higher packages]	Delivered by industry-leading strategic consultants, Pendo presents prescriptive guidance on how to best leverage analytics. Attendees will learn how to measure key performance indicators (KPIs) in order to make data-informed decisions and improve customer experience. Reports and dashboards aimed at understanding user interactions with a product will be built, along with guides to influence user action based on insights discovered.
Wrap-Up [Required]	Your Pendo Implementation Team will recap your project, handoff implementation documentation, and close out the engagement.

Flexible Session Catalog Details

Session	Description
Intro to Guides	An introduction to Pendo's Guides product. Learn how to create banners, tooltips, walkthroughs, and other in-product messages to guide your users to successful outcomes.

Session	Description
Intro to Tagging	An introduction to Pendo's Tagging functionality. Partner with a Pendo Consultant to learn how Pendo categorizes page and feature data. Start to implement your own tags, and understand user behavior and product usage.
Intro to Analytics & Segmentation	An introduction to Pendo's Analytics and reporting functionality. You'll learn how to build tabular and graphical reports about the data collected by Pendo, combined with segmentation and targeting to slice your data in the most relevant ways and retarget messages to the right users.
Replay Overview	An introduction to Pendo's Session Replay product. You'll learn how to watch playbacks of user interactions with your web apps, providing insights into user behavior through both a visual and data lens. You'll learn how to aid discovery for UX researchers, facilitate feature adoption for product managers, and assist in troubleshooting for quality assurance and support teams.
Discover Overview [4 Sessions]	A four-session program to help your team learn Pendo's Discover product, and implement internal processes for continuous discovery, validation, and planning around what matters most to your customers. You'll get hands-on experience with Discover's integrated set of tools to give you confidence in the data that informs your product decisions.
NPS Overview	Your Pendo Consultant will lead a session explaining Pendo's NPS (Net Promoter Score) product, and how it can be used to gather qualitative feedback about user sentiment.
Data Sync Overview [2 Sessions]	A two-session program, led by a Pendo Professional Services Engineer, covering Pendo's Data Sync product. Sessions will cover the schema contained in the avro files exported from Pendo, as well as the manifest and other files exported to a cloud storage bucket. Best practices and guidance will be provided around the ETL (extract transform load) process into a data warehouse; it is expected that the requisite ETL tools, data warehouse solution, and data engineers will be brought by the customer to this session.
API Overview	Led by a Professional Services Engineer. This session will cover the topics of Pendo's Agent API (Application Programming Interface) and v1 API, including any of the endpoints or functionality provided within them. Useful for planning out the build of custom integrations, or the usage of Pendo's Aggregations query language.
Guides 2.0	An advanced training focused on Pendo Guides. This session will cover a blend of topics, including but not limited to: best practices around Pendo layouts and themes, the Pendo Resource Center, leveraging activation methods for improved user experiences, and advanced behaviors using Guide Logic.

Session	Description
Tagging 2.0	An advanced training focused on Pendo tagging. This session will cover a blend of topics, including but not limited to: CSS (Cascading Style Sheets) selector training, identifying strong vs. weak tags, click and page event properties, Pendo's Location API, and track events.
Advanced Reporting	An advanced training focused on Pendo's behavioral analytics reporting and visualization. This session will cover a blend of topics, including but not limited to: advanced data explorer usage, product engagement score, core events, time to first use, page/feature retention, and tracking goal progress.
Intro to Integrations	An overview of Pendo's productized integrations. This can be used as a deep dive on one particular integration, or as an overview of the different types of integrations possible with Pendo, such as knowledge base, live chat, support ticketing, data sync, or other types of vendor integration solutions.
Governance	Introductory discussion around how to cross-functionally govern Pendo successfully at an organization. Includes topics around building a Pendo Center of Excellence, ideal team structure for Pendo Guides & Analytics management, documentation of best practices, managing data and installation of multiple products on Pendo, standardization, and administration.
Expert Services [between 4 - 12 Sessions]	<p>A Pendo Professional Services Engineer will provide hands-on-keyboard support during your implementation, creating necessary tags, guides, or analytics reports to get you started quickly with Pendo. Expert Services can be run asynchronously instead of in session format; each hour spent performing Expert Services will consume one session.</p> <p>Professional Services Engineers are capable of writing JavaScript and building custom experiences within Custom Code building blocks in the Resource Center or guides. Scoping or purchasing additional Expert Services may be required for advanced deliverables. Any scoping or design workshops will consume the corresponding number of sessions from the program pool.</p>

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages project, and ensures on-time delivery. Articulates KPIs and drives business outcome strategy. Creates the environment to support Pendo. Serves as the main point of contact.	10% FTE
Engineer	Installs Pendo within relevant application(s). Participates in discussions around metadata selection.	5% FTE

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Pendo Analyst *	Reviews analytics regularly to identify potential areas for improvement. Builds and maintains guides. Defines paths and core events. Establishes dashboard views based on user need. Owns Pendo technical configuration and validation.	20% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

* Customers without in-house resources to perform technical configuration, or front-end development activities may leverage Expert Services sessions, or purchase them at an additional cost.

Assumptions

- Customer will install Pendo code on the applicable Customer or third-party application(s) and provide access to Customer's Pendo subscription and such application(s) as needed to provide Professional Services.
- Pendo will not modify Customer application code. For clarity, Customer is responsible for installing the Pendo snippet, SDK, or deploying the Pendo Launcher extension to user endpoints in order to enable the Pendo solution functionality.
- The Professional Services expire and must be consumed in the applicable timeframe following execution of the Order Form or other ordering document between Pendo and the Customer, as outlined below:
 - Getting Started: 60 days after execution
 - Launch: 60 days after execution
 - Launch Plus: 90 days after execution
 - Launch Premium: 180 days after execution
 - Launch Ultimate: 270 days after execution
- Each session can have up to 10 attendees. If additional attendees are required, Pendo will work with the Customer to determine whether additional sessions are needed.
- Customer must have an active, paid subscription for any Application Key in scope for the Professional Services.
- If deploying Pendo via a browser extension, Customer must have the Pendo browser extension installed and reviewed before any other flexible session activities will occur.
- For additional enablement and consulting sessions, a Pendo consulting resource will be assigned based on mutually agreed upon session timing and availability.
- For Professional Services Engineer Led sessions, a Pendo PS Engineer resource will be assigned based on mutually agreed upon session timing and availability.
- The Professional Services will be performed on a remote basis.

The Launch implementation services performed by Pendo in accordance with this Services Description are referred to as “Professional Services.” This Services Description is incorporated into the Pendo Order Form or other ordering document between Pendo and a customer covering the purchase of applicable Professional Services.

Last updated: May 5, 2024