

Pendo Value Realization Service Offerings

“Best-in-class” Onboarding 101

Overview

The Best-in-class Onboarding 101 service is the first part of an intensive series intended to assist customers in optimizing onboarding for their own customers. The objective of this service is for the Pendo Strategy Consulting team to provide Customer with the following:

- Discovery of customer’s current state in-app onboarding, pain points and user personas
- Teaching of Product Led methodology and best in class in-app onboarding use cases
- Facilitation of working sessions for customer to ideate a reimagined in-app onboarding experience for their customers; map onboarding actions and prioritize key actions for guidance
- Review of customer’s progress, areas for continued improvement, and recommendations for next steps

Customer Participants required: *Customer champions & members from customer working teams that build onboarding experience*

Implementation activities

Session 1 | Product Discovery Session:

- Session to consult on customer’s current state in-app onboarding process
- Define pain points of customer’s current state
- Capture customer’s user personas and their main use cases
- Define customer’s problem statement for future working sessions

Session 2 | Product-Led Onboarding:

- Session to teach customer core principles of Product Led methodology
- Present customer with use cases for design & process inspiration
- Consult on key components of onboarding experiences to set the stage for working sessions (Define Core Use, Entry Situations and Core User Routines)

Session 3 | Reimagine Your Onboarding Experience:

- Hands on session in Miro to define customer's Core Use, Entry Situations and Core User Routines per persona(s) that were defined and approved in Product Discovery session

Session 4 | Reimagine Your Onboarding Experience (Cont.):

- Map onboarding actions from Core User Routines to Entry Situations
- Customer prioritizes key actions for Pendo guides
- Customer creates wireframe of Pendo guides to support their new onboarding experience

Session 5 | Implementation:

- Assistance from Professional Services Consultant with guide building and implementation of onboarding experience within Pendo
- Option to engage [Pendo Expert Services](#) for hands-on keyboard guide building and implementation of outlined Onboarding experience within Pendo

Session 6 | Project Recap & Close:

- Debrief with relevant customer stakeholders by reviewing a custom assessment built by your Professional Services Consultant, which includes summaries of:
 - Key findings from data analysis
 - Workshop exercises/key outcomes
 - Action items planned to be implemented for continued onboarding enhancements

Customer roles and responsibilities

Role	Responsibilities	Estimated Hours for Engagement
Champion	Serves as the main point of contact and creates the environment to support Pendo.	Participates in initial product discovery & all working sessions
Working Teams (i.e. UX, L&D, Product)	Participates in workshop sessions to ideate new in-app onboarding experience. Provides expertise from customer POV to inform user journeys, internal requirements and other relevant information. Ultimately defines new onboarding actions.	Participates in all working sessions

Pendo roles and responsibilities

Role	Responsibilities
Strategic Consultant (x2)	Facilitates discovery and provides thought leadership and guidance on best practices, design, configuration and enablement of in-app onboarding and Product Led Organization best practices.

Role	Responsibilities
Professional Services Engineer	Provides hands-on assistance to customers to execute on wireframe created in working sessions by building the guides included in their in-app onboarding experience (when applicable). Additional services can include building guides for Resource Center, tagging efforts and/or segmentation creation.
Project Manager*	Leads project activities, completes project management tasks, and facilitates cross-functional team work.

**Contingency - if this engagement is part of a larger scope of work PM would be included; if engagement is one-off PM is not needed*

Assumptions

- Customer will provide temporary access to the relevant Pendo subscription and application(s).
- Customer participants in working sessions will be familiar with Pendo (i.e. regular users or have watched Pendo Academy content).
- Pendo will not modify Customer applications or third-party code. For clarity, Customer is responsible for installing the Pendo code snippet in its application(s).
- No additional implementation assistance is included outside of the defined sessions.
- The Professional Services will be performed on a remote basis, unless onsite is outlined in the contract.
- The Professional Services expire and must be consumed within 90 days after contract execution.
- Hands-on keyboard work will only be performed if there are additional services purchased for Professional Service Engineer hours.

Dependencies

- [if purchased] Hours and availability from the PS Engineering Team to shadow the customer working sessions and to build assets as needed after the working sessions are complete

The Best-in-class Onboarding 101 service performed by Pendo in accordance with this Services Description are referred to as "Professional Services ." This Services Description is incorporated into and governed by the terms and conditions in the Pendo Order Form or other ordering document between Pendo and a customer covering the purchase of applicable Professional Services.

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