

Pendo Value Realization Service Offerings

Meaningful Analytics Service Offering Series

Overview

The Meaningful Analytics professional service is a series of six sessions that help a customer identify and implement meaningful metrics leveraging the Pendo platform. The objective of this service is for the Pendo Strategy Consulting team to provide the Customer with the following:

- Discovery to identify customer KPIs, success metrics, and anything the customer is looking to measure about their product and visitor behavior
- Recommendations and guidance for how customer can best track and measure identified KPIs using Pendo analytics capabilities
- Working sessions to analyze data, gather findings, and identify opportunities to improve and achieve objectives related to KPIs
- Assistance customer with implementation initiatives targeting KPI objectives (guide building, segmentation, Resource Center configuration, etc.)
- Review of analytical findings and key outcomes, opportunities for continued improvement, and recommendations for next steps

Implementation Activities

Customer Participants required: *Customer champion and members from customer working teams (customer support, customer success, UX and product management)*

Session 1 | Discovery

- Identify customer KPIs, success metrics and anything the customer is looking to measure regarding their product and visitor/account behavior
- Identify important user segments for customer's efforts to focus on
- Identify parts of customer's product that indicate successful usage

- Understand any methods the customer is currently using to track these areas today
- Ensure a majority of customer app is properly tagged in Pendo to track these areas and get the most value out of their analytics
- Facilitate exercise to outline the customer’s ideal user journeys

Session 2 | How Pendo Can Help:

- Session led by Strategy Consultant to provide customer recommendations for how to track and measure identified KPIs using Pendo analytics capabilities
- Work with customer to set up recommended reports, dashboards, segments, etc. within Pendo to track desired KPIs
- Work with customer to analyze data and begin to gather findings

Session 3 | Dig Into the Data

- Working session to assist customer in continuing to analyze data and summarize findings
- Identify opportunities to improve and achieve objectives related to customer KPIs

Session 4 | Ideation:

- Working session to brainstorm ideas to improve the customer app user experience and address pain points based on findings discovered from analytics (guides that may need to be created, segments, content needed for Resource Center, etc.)

Session 5 | Implementation:

- Assistance from Professional Services Consultant with guide building, segmentation, Resource Center configuration, guide experiment setup (as needed), etc. within Pendo to target KPI objectives
- Option to engage [Pendo Expert Services](#) for hands-on keyboard guide building and any other assets targeted at KPI objectives

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 that have been implemented/or planned to be implemented targeting KPI objectives
 - recommendations for continued offline success

Customer Roles and Responsibilities

Role	Responsibilities	Estimated Hours for Engagement
Champion	Serves as the main point of contact and creates	Participates in any

Role	Responsibilities	Estimated Hours for Engagement
	the environment to support Pendo. Assists with the procurement of any necessary resources from the customer side.	initial planning meetings and all working sessions
Product Management/UX	Contributes to identification of KPIs, user journeys, and target audiences to focus on. Handle any necessary tagging within Pendo and contribute to the ideation of guides targeting KPI objectives.	Participates in all working sessions
Guide Owners	Build guides coming out of working sessions to target KPI objectives.	Participates in all working sessions related to guide building within Pendo (Session 4 & 5)
Analysts/Business User	Contributes to identification of KPIs, user journeys, and target audiences to focus on. Analyze Pendo data to identify key findings and opportunities to improve user experience and support with further guidance.	Participates in all working sessions

Pendo Roles and Responsibilities

Role	Responsibilities
Strategic Consultant	Facilitates all sessions and provides thought leadership and guidance on how to best leverage Pendo analytics capabilities to track and measure identified KPIs.
Professional Services Engineer	Provides hands-on assistance to customers to build guides and any other assets needed to target KPI objectives (when applicable). Additional services can include configuration of relevant modules within the Resource Center, tagging efforts and/or segmentation creation.
Project Manager*	Leads project activities, completes project management tasks, and facilitates cross-functional team work.

**PM Contingency - if this engagement is part of a larger scope of work PM would be included; if engagement is purchased a la carte PM is not necessarily needed.*

Assumptions

- Customers 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 completed.

The Meaningful Analytics 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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