

Pendo Value Realization Service Offerings

Support Ticket Deflection Series

Overview

Support ticket deflection series is a six-session professional services offering intended to assist customers optimize their own support ticket deflection processes with product-led methods. The objective of this service is for the Pendo Strategy Consulting team to provide the customer with the following:

- Discovery to understand current methods the customer is using to deflect support tickets, metrics and overall objectives related to this initiative
- Product-led methodologies related to Customer self-service and deflecting support tickets
- Demonstration of the tools within Pendo that can be used to execute and report against support ticket deflection
- Stories from other Pendo customers that demonstrate potential results
- Using Pendo analytics, identification of areas where Customers' users experience friction when using their app
- Facilitation of working sessions to make Pendo support self-service, and create a wireframe of in-app guides that will be used to deflect support tickets
- Review of progress made, areas 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 (Help Customer to):

- Understand any methods the customer is currently using to help deflect support tickets
- Identify any known pain points/areas of friction based on support ticket data
- Understand metrics around support ticket volume

- Ensure various parts of the product related to support are properly tagged in Pendo (Support Icons, Help Center Articles, etc.)
- Understand the cost and time the customer spends resolving support tickets

Session 2 | Product-Led Methodologies and How Pendo Can Help:

- Review PLO concepts related to Customer self-service and deflecting support tickets
- Consult on the tools within Pendo that can be used to execute and report against this initiative
- Share customer stories
- Dive into Pendo analytics and identify areas of friction in the customer's app
- Discover if certain segments are utilizing support resources more than others

Session 3 | Ticket Trend Categorization and Guide Planning:

- Working session to categorize ticket trends and identify high priority trends for Customer's first set of guides
- Begin to create a wireframe of in-app guides that will be used to deflect support tickets

Session 4 | Guide Planning Cont.:

- Continue to create wireframes of in-app guides that will be used to deflect support tickets

Session 5 | Implementation:

- Assistance from Professional Services Consultant with guide building, segmentation, and guide experiment setup within Pendo to implement initiative to deflect support tickets
- Option to engage [Pendo Expert Services](#) for hands-on keyboard guide building targeted at support ticket deflection objectives (configuration of Resource Center available as needed)

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 support ticket deflection
 - Recommendations for ongoing offline success

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. Assists with the procurement of any necessary resources from the customer side.	Participates in any initial planning meetings and all working sessions
Support Team Lead	Understands large themes and recurring questions in the support queue and provides this insight to the broader team	Participates in all working sessions
Product Management/UX	Handle any necessary tagging within Pendo and contribute to the ideation of guides targeting support ticket deflection objectives	Participates in all working sessions
Guide Owners	Build guides coming out of working session to implement support ticket deflection initiative within Pendo	Participates in all working sessions related to guide building within Pendo (Session 4 & 5)
Analysts/Business User	Analyze Pendo data to identify areas of friction and measure success of any implemented guides	Participates in all working sessions

Pendo Roles and Responsibilities

Role	Responsibilities
Professional Services Consultant	Facilitates all sessions and provides thought leadership and guidance on best practices for deflecting common support tickets.
Professional Services Engineer	Provides hands-on assistance to customers to execute on wireframes created in working sessions by building the guides included in their support ticket deflection campaigns (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 Support Ticket Deflection services 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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