

# Pendo Value Realization Service Offerings

## Driving Feature Adoption

### Overview

The Driving Feature Adoption service is a five session series intended to help the Customer improve feature adoption for their product. The objective of this service is for the Pendo Strategy Consulting team to provide the Customer with the following:

- Discovery to identify 3-5 features that customer will prioritize to increase feature adoption
- Recommendations and guidance to the customer for how to best analyze feature adoption for identified features
- Working sessions with customer to analyze Pendo data, gather findings, and identify opportunities to increase feature adoption
- Assistance with implementation initiatives targeting feature adoption objectives (guide building, segmentation, Resource Center configuration, etc.)
- Review of analytical findings and key outcomes, opportunities for continued improvement, and recommendations for next steps

**Customer Participants required:** *Customer champions, members from customer working teams (Product, UX, Analysts, etc.)*

### Implementation Activities

#### Session 1 | Discovery

- Help customer identify the key features that should be prioritized to drive feature adoption
- Identify important user segments for customer to focus on
- Identify parts of customer product that indicate successful usage
- Form hypotheses around customer's product features that may have high and low usage
- Understand any methods the customer is currently using to increase feature adoption
- Facilitate exercise to outline the customer's ideal user journeys and features that visitors engage with along the way

- Ensure the appropriate customer product pages and features are tagged in Pendo to have full visibility into the data and get the most value out of their Pendo analytics

### Session 2 | Dig Into the Data:

- Session led by Pendo Strategy Consultant to provide recommendations and guidance for how customer can best analyze feature adoption for identified features coming out of discovery
- Work with customer to set up recommended reports, dashboards, segments, etc. within Pendo to track feature adoption of identified features
- Work with customer to analyze data, begin to gather findings, and identify opportunities to improve feature adoption
- Set goals for how customer's success might look

### Session 3 | Ideation & Planning:

- Working session with customer to brainstorm ideas and create a wireframe of guides and any other assets needed with the objective to increase feature adoption for prioritized customer product features based on data findings. (Guides that may need to be created, segments, content/modules needed for Resource Center, etc.)

### Session 4 | Implementation:

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

### Session 5 | 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 driving feature adoption
  - Recommendations for ongoing offline success

## Customer Roles and Responsibilities

Role	Responsibilities	Estimated Hours for Engagement
<b>Champion</b>	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

Role	Responsibilities	Estimated Hours for Engagement
<b>Product Management/UX</b>	Contributes to identification of key features, user journeys, and target audiences to focus on. Handle any necessary tagging within Pendo and contribute to the ideation of guides targeting feature adoption objectives.	Participates in all working sessions
<b>Guide Owners</b>	Build guides coming out of working sessions to increase feature adoption.	Participates in all working sessions related to guide building within Pendo (Session 3 & 4)
<b>Analysts/Business User</b>	Contributes to identification of key features, user journeys, and target audiences to focus on. Analyze Pendo data to identify key findings and opportunities to increase feature adoption. Measure success of implemented initiatives targeting feature adoption.	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 & in-app guidance capabilities to increase feature adoption.
Professional Services Engineer	Provides hands-on assistance to customers to build guides and any other assets needed to increase feature adoption (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 one-off 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 Driving Feature Adoption 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.

*Last updated: August 8th, 2023*