

5 Ways Product Data Can Help Solve Your Customer Visibility Problem



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Let Us Introduce Ourselves

Growing rapidly

- Founded in October 2013
- 600+ customers; 200+ employees
- Offices in Raleigh, NC (HQ), NYC, SF, Israel
- 250% revenue growth over last 12 months
- Tracks over 45 billion events from 91 million users every month

Awarded:



Trusted by hundreds of companies, including:



Backed by leading investors:



5 Quick Thoughts

- Optimize onboarding to reduce churn
- Reduce support calls
- How to convert more trials
- Actionable NPS campaigns
- Product data everywhere



Challenge: How can we decrease churn?

Use data to drive better onboarding & reduced churn



Account Status and Maturity

- **New accounts:** address setup and “empty state” issues
- **Existing accounts:** address key features leveraging account data



User Role

- **Admin vs regular users:** add or remove setting features from experience
- **Job or functional role:** customize learning to focus on the most relevant application tasks



Other Context

- **Plan level:** don't instruct users of features they haven't purchased
- **Seasonal:** Do usage patterns change throughout the year (i.e. accounting for tax deadlines)

**The more relevant your onboarding experience is,
the more effective it is.**

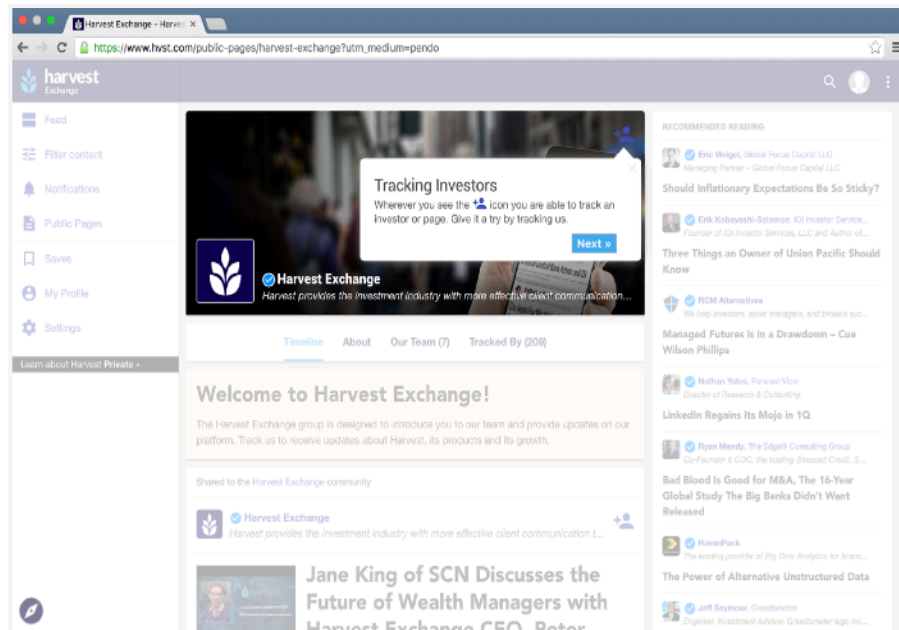
How Harvest Exchange improved onboarding

What they did:

- Segmented user base by individual investors and financial professionals
- Customized onboarding experience for each role - showing each persona their most relevant features

Outcomes:

- 2x increase in the number of investors signing up for additional features
- **70% growth** in returning monthly visitors



Challenge: How can you decrease support tickets?

Data can help you create a plan to deflect tickets

Support tickets for basic “**how-to**” questions frustrate both customers and customer success teams

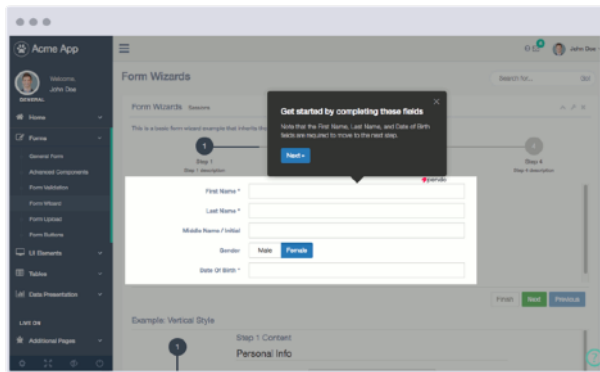
- Look for common ticket themes to identify areas that produce the most questions
- Study user behavior when tickets are issued - what pages / features drive them to support
- Look for in-product (UX improvements or added guidance) remediation

Even the most intuitive UX needs some help

Bringing guidance in-app allows you to provide contextual, and highly-relevant help without cluttering the user experience.



Explain features and offer how-to guidance... right in the interface



Walk users step-by-step through key application tasks



Link out to relevant help center content and support resources

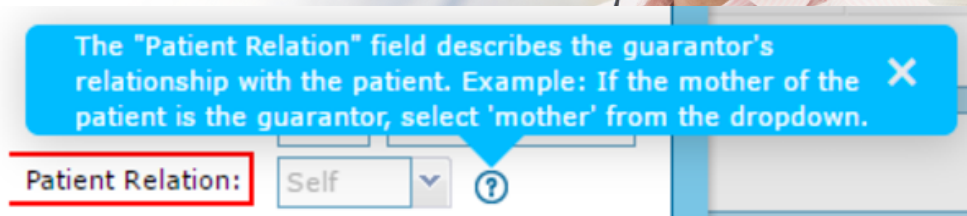
How WebPT reduced support tickets

What they did:

- Study time on specific pages / in specific processes to identify areas where users struggle
- Measure which features generate the most support tickets
- Deploy specific tooltips for the features where users struggle the most

Outcomes:

- **50% reduction** in the number of support requests

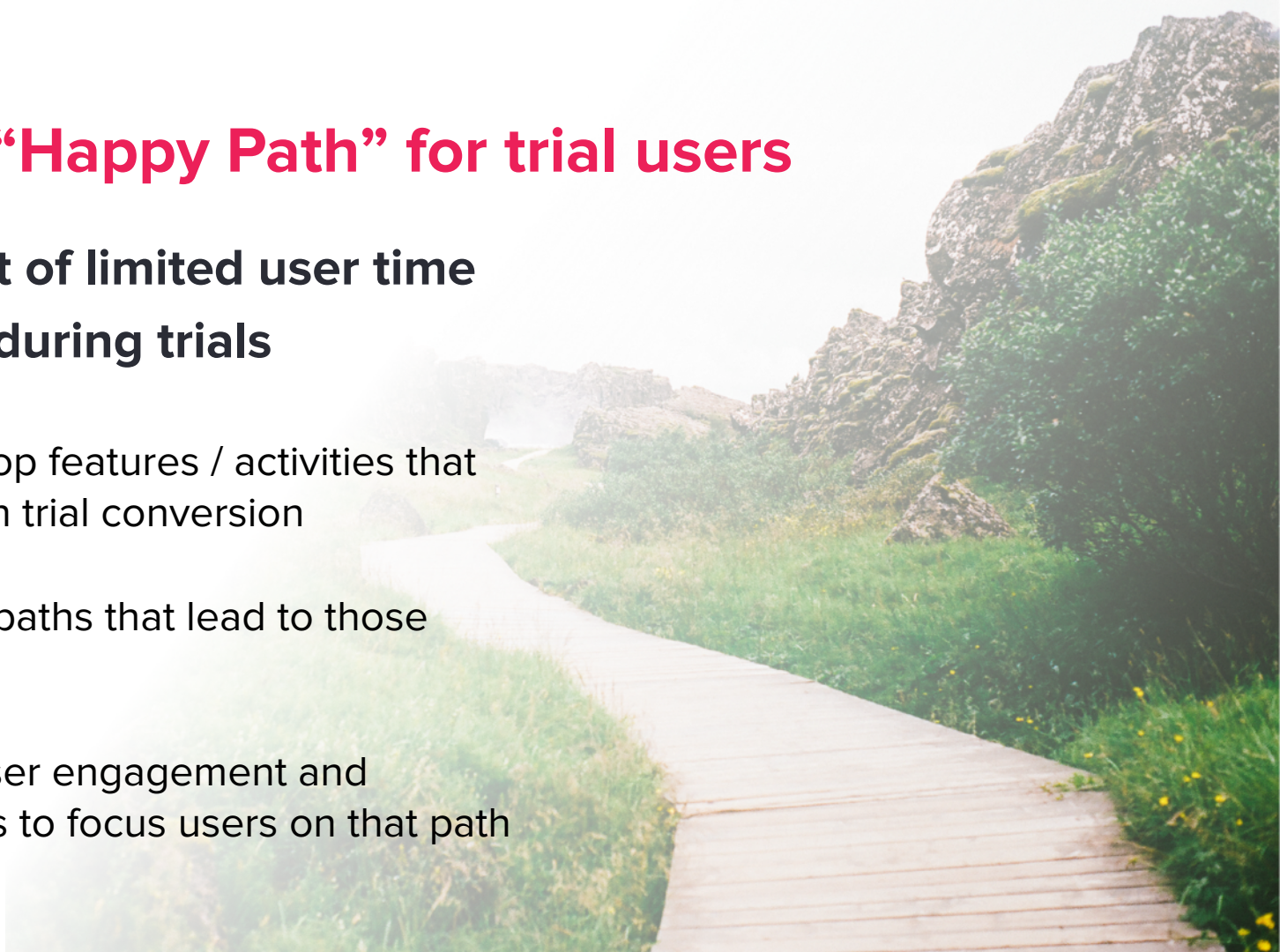


Challenge: How can you increase trial conversions?

Create the “Happy Path” for trial users

Make the most of limited user time and attention during trials

- Identify the top features / activities that correlate with trial conversion
- Design user paths that lead to those activities
- Focus trial user engagement and walkthroughs to focus users on that path



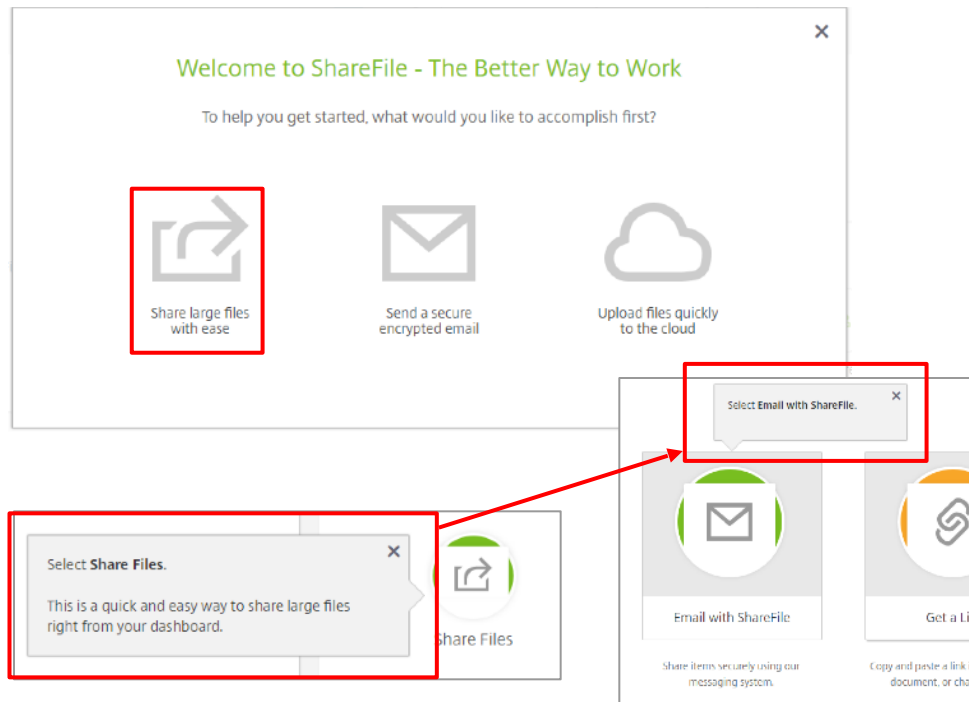
How Citrix improved trial conversion

What they did:

- Upon first login, Trial users presented with lightbox with options on what to accomplish first
- User taken step-by-step through tasks (Send a File, Upload a File, Add User, Apps Page, etc)

Outcomes:

- 76% of trial users want to share a large file
- 52% of trial users are completing the “share a file” walkthrough
- **11% increase** in trial conversion rate



**The path you think
customers will
take to convert**



**The path the data
shows you customers
take to convert**



Challenge: How can we make NPS more actionable?

You probably are already doing these things...

Establish an NPS baseline to see correlation to customer loyalty

Understand how NPS affects retention, churn, and expansion

If not you should

Make NPS more actionable

**Integrate Product Usage
(by Promoters and Detractors)**



Leverage that knowledge

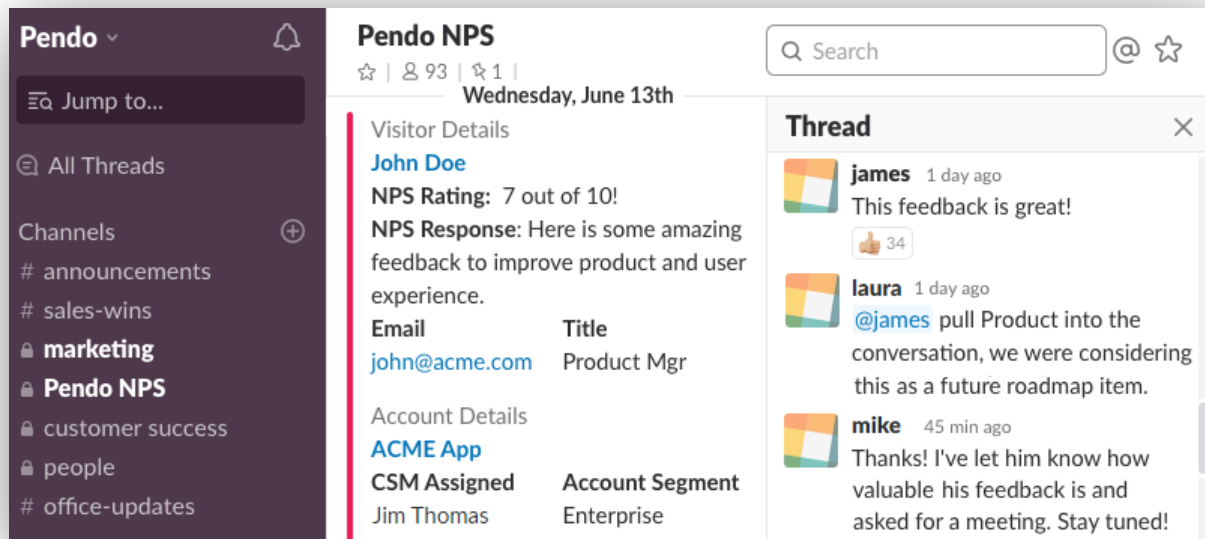
Push customers to areas that correlate to user loyalty

Dig into detractor areas and look for areas of customer education or guidance




Make NPS more visible

 **ProTip!** Keep a pulse on your NPS responses through 




The screenshot displays the Pendo NPS interface. On the left is a dark sidebar with the Pendo logo and a search bar. Below the search bar are links for 'All Threads' and a list of channels including '# announcements', '# sales-wins', '# marketing' (highlighted), '# Pendo NPS' (highlighted), '# customer success', '# people', and '# office-updates'. The main content area is titled 'Pendo NPS' and shows a search bar, a date filter for 'Wednesday, June 13th', and a list of visitor details for 'John Doe'. The details include an NPS Rating of 7 out of 10 and a response about improving product and user experience. Below this is a table with columns for 'Email' and 'Title', showing 'john@acme.com' and 'Product Mgr'. Further down are 'Account Details' for 'ACME App' and 'CSM Assigned' to 'Jim Thomas', with an 'Account Segment' of 'Enterprise'. On the right, a 'Thread' section shows three messages: 'james' (1 day ago) saying 'This feedback is great!' with 34 likes, 'laura' (1 day ago) replying '@james pull Product into the conversation, we were considering this as a future roadmap item.', and 'mike' (45 min ago) replying 'Thanks! I've let him know how valuable his feedback is and asked for a meeting. Stay tuned!'.

Pendo 

Jump to...

All Threads

Channels 

- # announcements
- # sales-wins
- # **marketing**
- # **Pendo NPS**
- # customer success
- # people
- # office-updates

Pendo NPS

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Wednesday, June 13th

Visitor Details

John Doe

NPS Rating: 7 out of 10!

NPS Response: Here is some amazing feedback to improve product and user experience.



Email	Title
john@acme.com	Product Mgr


Account Details


ACME App

CSM Assigned	Account Segment
Jim Thomas	Enterprise

Thread

 **james** 1 day ago
This feedback is great!
 34

 **laura** 1 day ago
@james pull Product into the conversation, we were considering this as a future roadmap item.

 **mike** 45 min ago
Thanks! I've let him know how valuable his feedback is and asked for a meeting. Stay tuned!

Follow-up playbook: email and phone

Reach out to anyone that responds

- Monitor your NPS on a regular basis and set up a framework for responding to each user when they submit a score.
- Consider having CSM's respond if they own the account
- Provide your team with a template of responses they can use when a user responds with a certain score.

Email/Phone Follow-up

In-App Follow-up

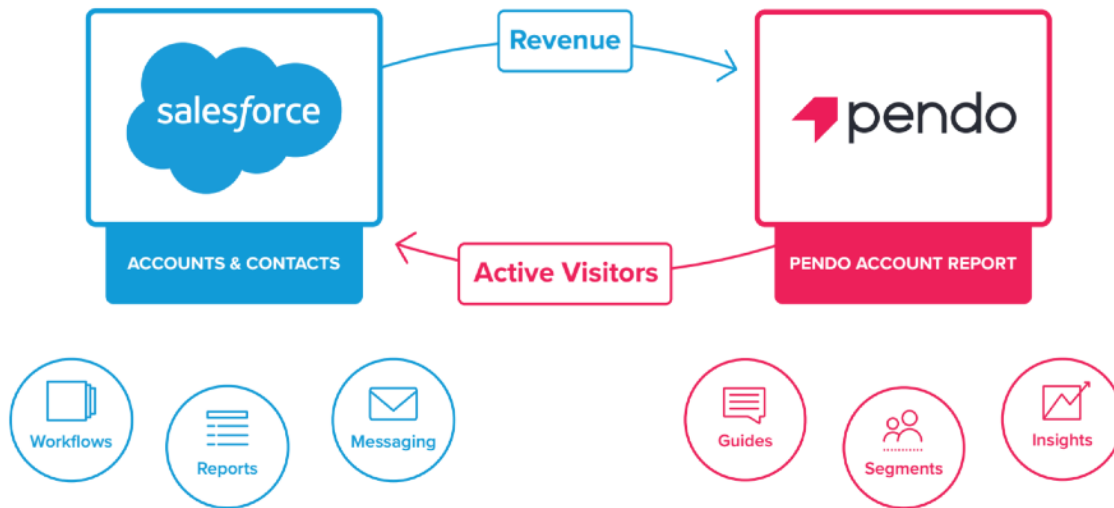
Plan for Future



Hi (user) - Thanks so much for your feedback. I know you are busy and don't want to waste your time, but if there is one thing we could be doing better to improve, what would that be?

Challenge: How can we get visibility into product data from everywhere?

PRODUCT DATA EVERYWHERE. CUSTOMER DATA IN YOUR APP.



How we push to Salesforce

Salesforce Push lets you “push” data **FROM** Pendo Account and Visitor reports **TO** Salesforce on a nightly basis. You can leverage Pendo data inside Salesforce for workflows, generating tasks, sending notifications, reporting, and 3rd party integrations.


Examples of Pendo data to push to Salesforce:

- Time customer spends in your product
- Days active in the product
- Level of activity in the product
- Feature X used or not used and how many times
- Number of active users in the product
- NPS scores

Active Subscription Count	1.00
Total Time On Site (Last 30 Days) ?	304
Max Active Visitors (Last 30 Days)	4
Current Number Of Pages	260
Current Number Of Features	49.00
Current Published Guide Count	3
Events Last 30 Days	4,487.00

..and how we pull

Salesforce	Account Name	String
Salesforce	Account Past Due	Boolean
Salesforce	Account Segment	String
Salesforce	AE Assigned	String
Salesforce	BDF - Total Score	Float
Salesforce	CSM Assigned	String
Salesforce	CSM Assigned Slack Username	String
Salesforce	CSP Enabled?	Boolean
Salesforce	Current ARR from Opportunities	Float
Salesforce	Current Customer	Boolean
Salesforce	Current Success Stage	String
Salesforce	Days In Current Success Stage	Float
Salesforce	First Opp Close Date	Date
Salesforce	Free Trial End Date (Read Only)	Date
Salesforce	Num Paying Opps	Float
Salesforce	Onboarding Stage Days	Float
Salesforce	Onboarding Stage Start Date	Date
Salesforce	Product Team Can Message In-App?	Boolean
Salesforce	Renewal Date	Date




Hi, Envysion Team!

Looks like you're heads down evaluating Pendo. I'll be stopping by Tuesday afternoon, July 18.

What can I bring you?

Something Sweet ↕

SUBMIT



Hello Team Aquicore!


Are you getting the most out of Pendo?

I'm Erica, your Customer Success Manager, and I would love to meet and discuss how you can:

- Reduce support tickets
- Drive feature adoption
- Monitor customer health
- Gather product feedback

Or just want to say 'hi' and get more training? Feel free to book any available slot on my calendar or shoot me an email at erica@pendo.io

SCHEDULE IT!




Hello!

I'm James, your Customer Success Manager at Pendo. Are you looking to do more with your product? I'm here to help!

Feel free to book any available slot on my calendar or shoot me an email at James@pendo.io

SCHEDULE IT!



Pendo is coming to Seattle!

We're having a Pendo customer appreciation happy hour at **Frolik Rooftop** August 16th from 4:30 - 7:30 pm and we hope you'll join us for food and libations.

No agenda, just a whole lotta thanks and a whole lotta pink!

ARE YOU INTERESTED IN ATTENDING?

YES NO



Resources

Resources



The Big NPS Playbook

pendo.io/resources/downloads/

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