



PENDO MONIUM 2023

WELCOME



**Todd
Olson**

CEO and Co-founder, Pendo

PENDOMONIUM 2023

A special welcome to our customers and partners



Since last Pendomonium

We now serve

10K

customers & Pendo
Free accounts

Our customers span

115

industries

We more than
doubled to

291K

monthly active users

We collect

>5T

events annually

Made by

800M

end users

For a total of

16T

cumulative events

Last year we talked about...



And then ChatGPT happened.



[Apps and Software](#) [Artificial Intelligence](#)

ChatGPT is the fastest growing app of all time

100 million users in two months.

By [Stan Schroeder](#) on February 2, 2023



The Washington Post
Democracy Dies in Darkness

The AI 'gold rush' is here. What will it bring?

In 2023, tech companies and start-ups are taking drastic action to deliver the next buzzy hit



By [Pranshu Verma](#)

Updated January 20, 2023 at 11:58 a.m. EST | Published January 7, 2023 at 6:00 a.m. EST

What is generative AI, and why is it suddenly everywhere?

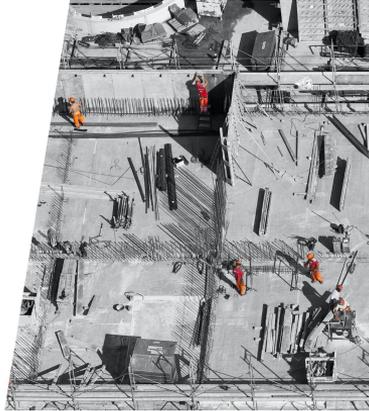
Between ChatGPT and Stable Diffusion, AI suddenly feels mainstream.

By [Rebecca Heilweil](#) | Jan 5, 2023, 8:00am EST

Your AI Powered Construction Copilot

Stop digging through thousands of files, apps, and emails to track down info. Just ask Constructable to instantly find the latest documents, changes, conversations, and anything else you need to keep your project on track.

[Get started](#) [Learn more](#)



Meet Quill

Your personal financial research assistant

[Get Started Now](#)

SEC Earnings Data
SEC EDGAR

Chat

Why did revenue grow?

Revenue growth in 2022 compared to 2021 was primarily driven by higher net sales of iPhone, Services, and Mac. The new iPhone models released since the beginning of the fourth quarter of 2021 contributed to an

Cupertino, California
(Address of principal executive offices)

Title of each class	Common Stock, \$0.00001 par value per share
	1.000% Notes due 2022
	3.275% Notes due 2024
	0.000% Notes due 2025
	0.875% Notes due 2025
	1.650% Notes due 2026

A tutor in your pocket

Snap, Ask, and Conquer with Your AI-Powered Study Buddy

[Download from App Store](#)



Your AI-powered event planner

Nowadays is your AI copilot that takes the hassle out of organizing corporate events. Just input event details, and our AI will contact venues and deal with negotiations for you.

[Book a demo!](#)



2023-
Roadmap.doc



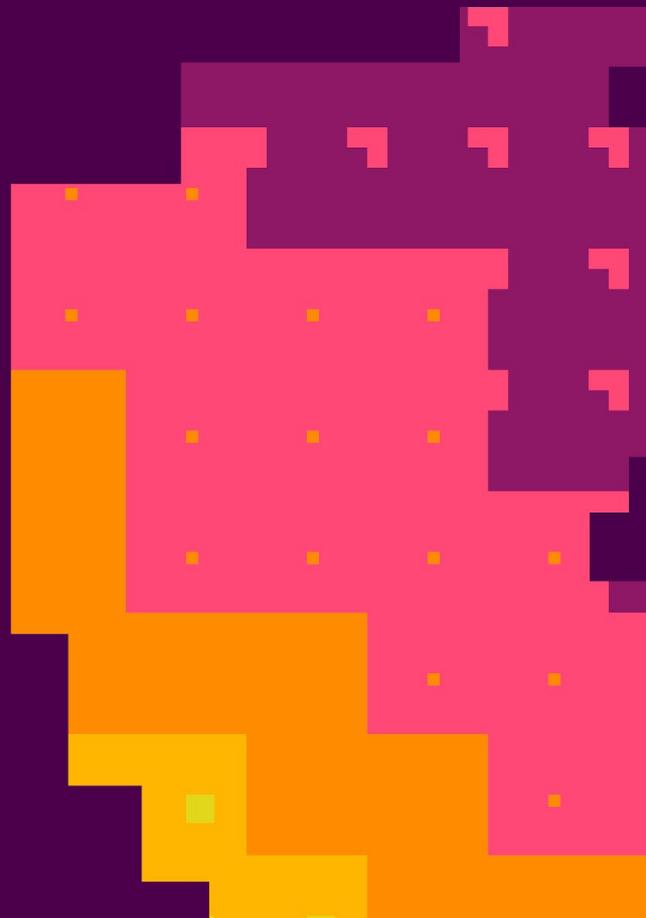


“We expect the dominant companies of tomorrow to rethink every industry with intelligence.”

SARAH GUO, CONVICTION

PENDOMONIUM 2023

**We're entering
the age of
intelligence**



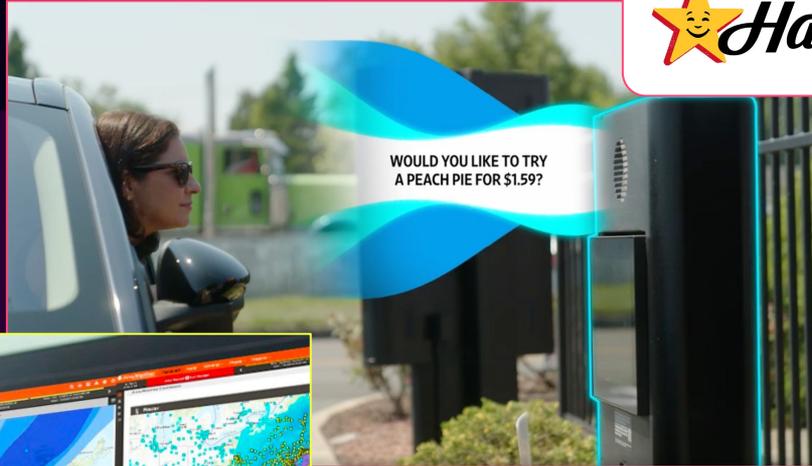


McKinsey estimates GenAI will add

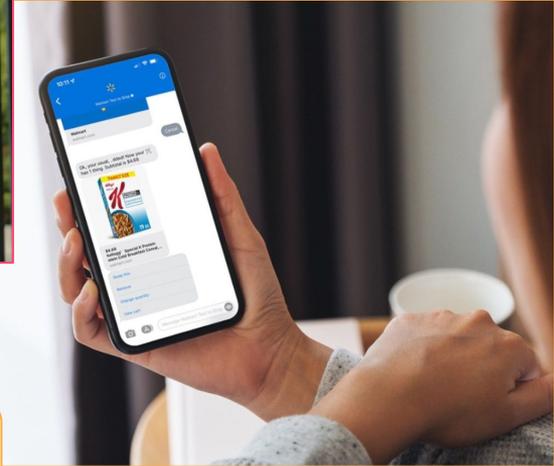
\$2.6 – \$4.4 Trillion

Per year to the global economy

There are some exciting bright spots



AccuWeather



PENDOMONIUM 2023



Bri Kimmel 

@briannekimmel



My hot take is selling software "per user" is a lazy, ineffective business model if AI continues to work.

Companies moving forward are going to be smaller and big tech companies are going to shrink even further than they already have.

5:53 PM · Sep 21, 2023 · **64.4K** Views



37



18



196



46



And some cautionary tales





When A.I. Chatbots Hallucinate

 Share full article    272

THE WALL STREET JOURNAL. Laura Baveman [PLAY WSJ PUZZLES](#)

English Edition • Print Edition • Video • Audio • Latest Headlines • More

World Business U.S. Politics Economy Tech Finance Opinion Arts & Culture Lifestyle Real Estate Personal Finance Health Science Style Sports

How Worried Should We Be About AI's Threat to Humanity? Even Tech Leaders Can't Agree.

Artificial-intelligence experts debate whether to focus on averting an AI apocalypse or problems such as bias, disinformation



Bloomberg

• Live Now Markets Economics Industries Tech AI Politics Wealth Pursuits Opinion

Technology

Microsoft Economist Warns Bad Actors Will Use AI to Cause Damage

- Danger of election interference cited by Michael Schwarz
- He sees 'clearly' a need to regulate Artificial Intelligence

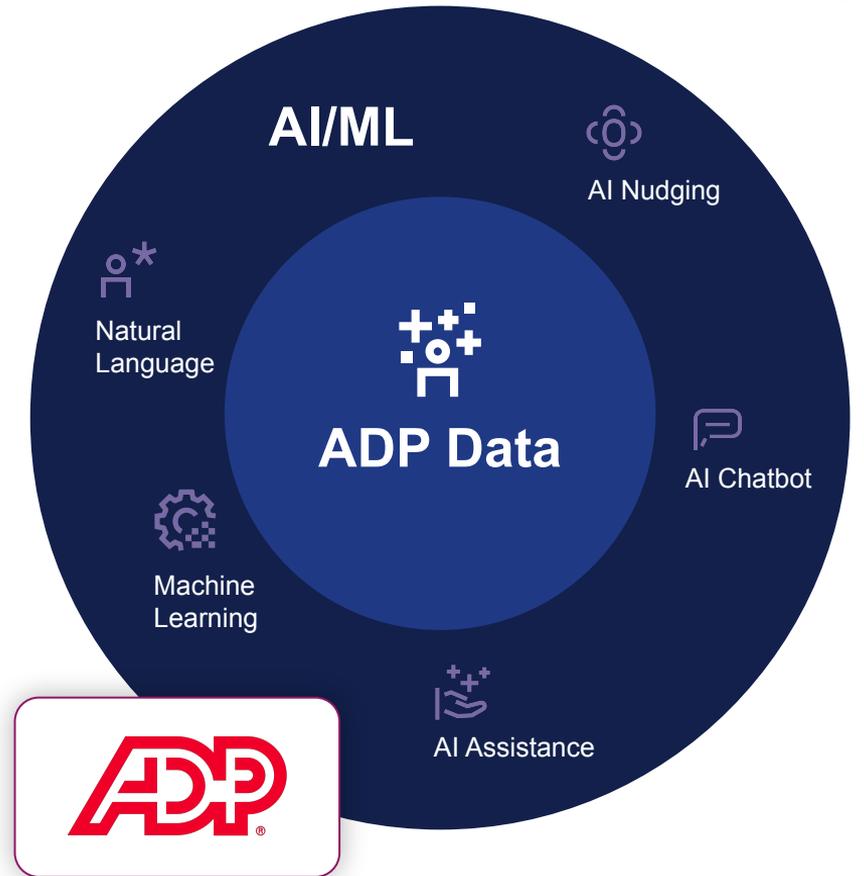
CIO JOURNAL

AI Is Generating Security Risks Faster Than Companies Can Keep Up

Rapid growth of generative AI-based software is challenging business technology leaders to keep potential cybersecurity issues in check

AI is not a cheat code

You have to build
great product



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Good morning, Sarah!

Have a great day!



Search

Actions [View All](#)

- Manage Pay Runs
- Manage Associates' Pay Data
- Reports and Analytics
- Manage Payroll Company Data

Quick Links [View All](#)

- Add New Hire
- View Time Reports

Things To Do [Add a Task](#) [View All](#)

	Insight	2 Employees at risk for turnover.	Now	View
	Nudge	You have a new hire starting next week!	Friday	View
	Nudge	Speak to Jane. She did not get the Sales...	Next Week	View
	Performance	Annual reviews start soon.	November 1, 2023	View

Company News



Job Application



Step Number 1 of 4

Personal Information

First Name

Middle Name

Last Name

I also want to provide preferred names

Preferred First Name

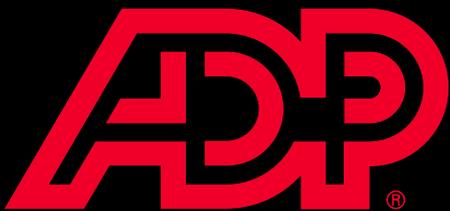
Preferred Middle Name

Preferred Last Name

Save

← Back

Next →



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How to think about leveraging AI

Where to begin: a hierarchy of AI strategy



First Level: Add GPT to our surfaces

Second Level: Automate our workflows

Third Level: Replace our workflows

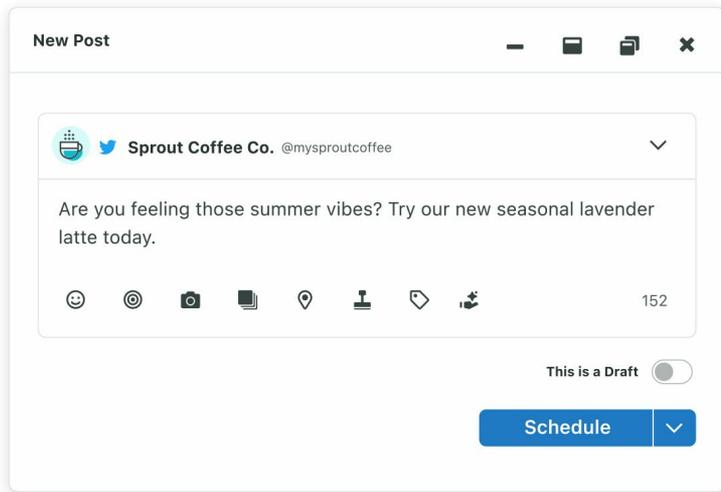
Fourth Level: Do the work for our customers

Add LLMs to your surfaces

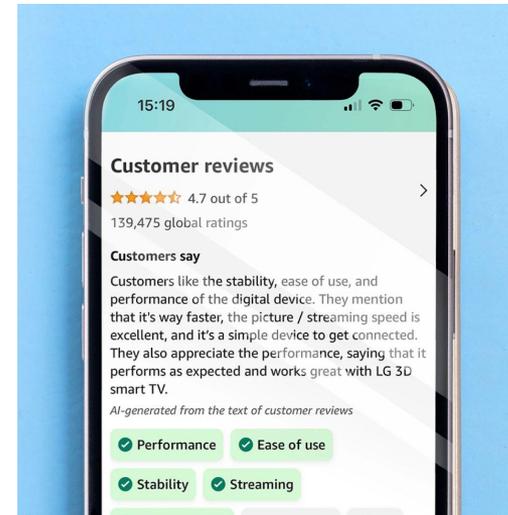


sproutsocial

AI-powered social copy



AI-generated customer review highlights



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“Perils” of just adding LLMs



AP Art History	5 86th–100th
AP Biology	5 85th–100th
AP Calculus BC	4 43rd–59th
AP Chemistry	4 71st–88th
AP English Language and Composition	2 14th–44th
AP English Literature and Composition	2 8th–22nd
AP Environmental Science	5 91st–100th



Gartner

Morgan Stanley

PENDOMONIUM 2023



Painkiller

VS



Vitamin

Understand your user's JTBD



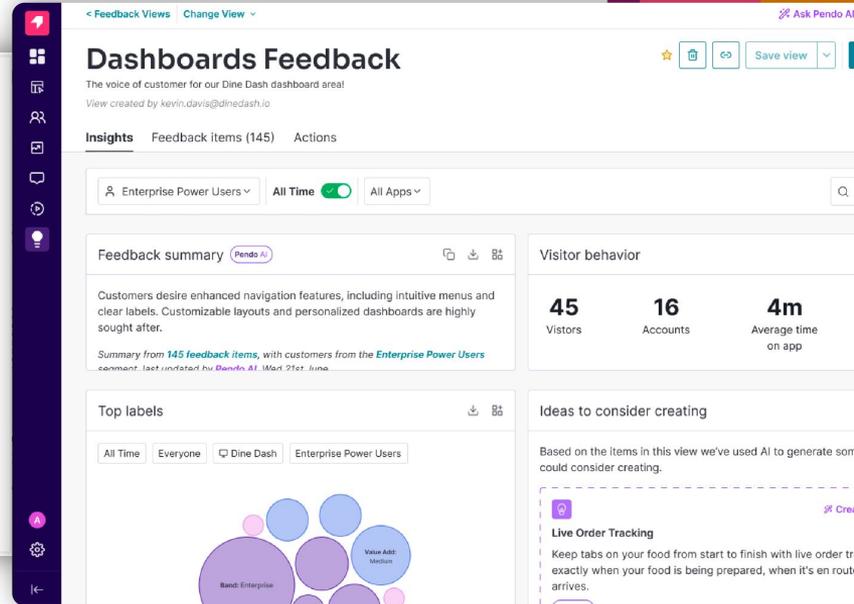
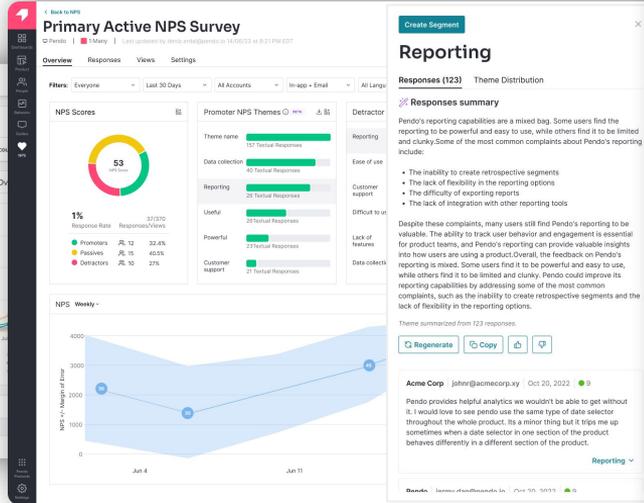
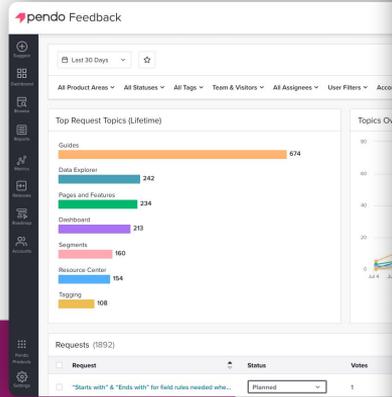
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Solving pain for product teams

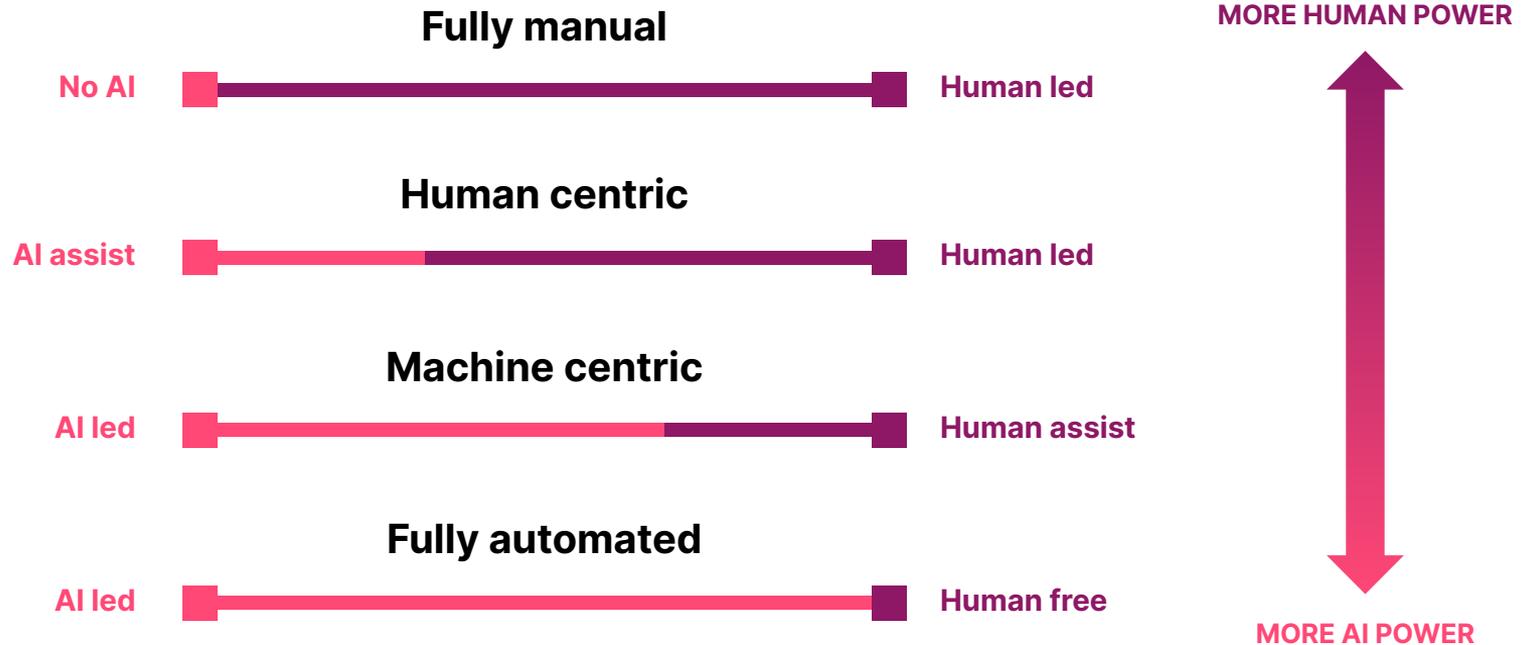
2021
Topics

2022
NPS Insights

TODAY
Discover

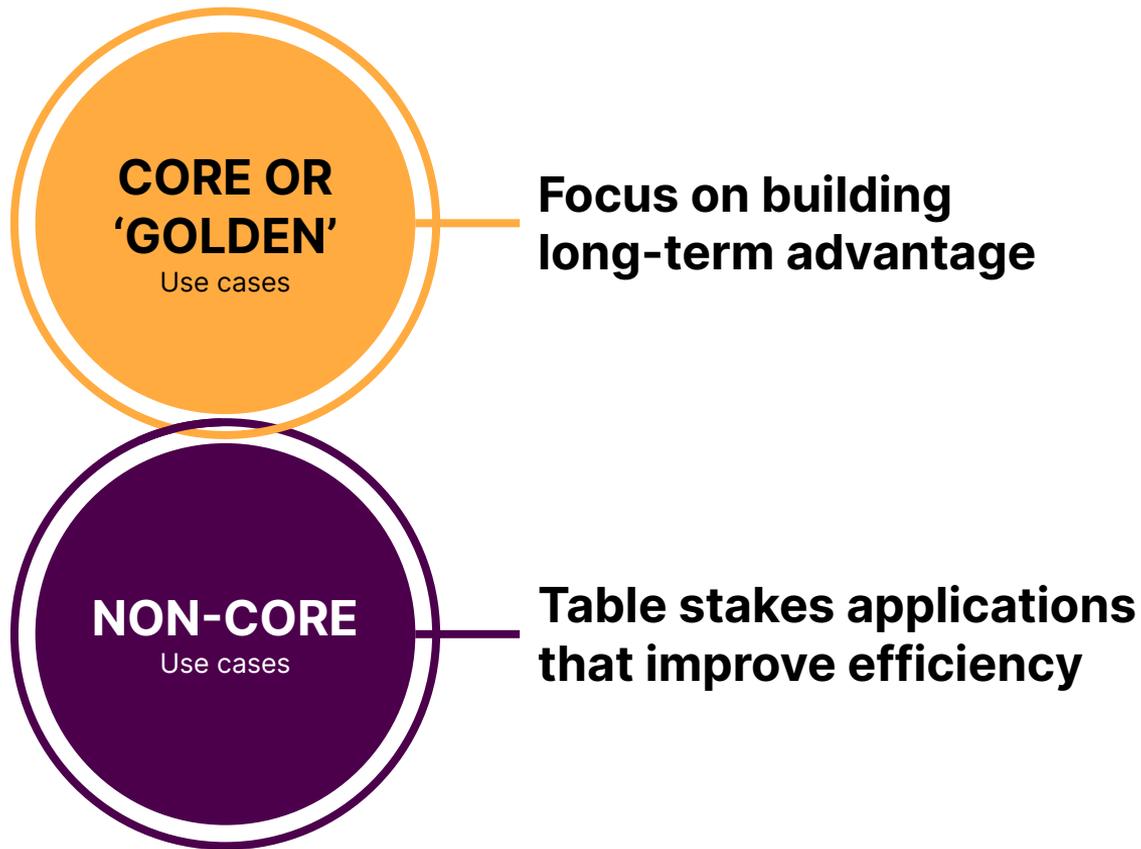


Consider the spectrum of automation





Discover your “golden use case”



Examples of golden use cases



Predicting staffing and revenue for dealerships

An ML model predicts number of monthly service appointments with **80% accuracy**

Services
Next step: Transportation and Time 3 of 5

Review dealer's other recommendations
The following services are recommended for your vehicle.

Estimated mileage
112,555 mi

- 4 Wheels alignment \$79.95
- Battery service \$29.95
- Car wash + detailing

Next

Transportation and Time
Next step: Appointment Summary 3 of 4

Transportation
No ride needed

Service Advisor
Cheryl Grant

Apr 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
2	3	4	5	6	7	8
9	10	11	12	13	14	15

AM

7:15	7:30	8:00	8:15
8:30	9:00	9:15	9:30
10:00	10:15	10:30	11:00



Predicting and improving student outcomes

New ALEKS AI reduces time spent on assessments by over **20%**

ALEKS AI

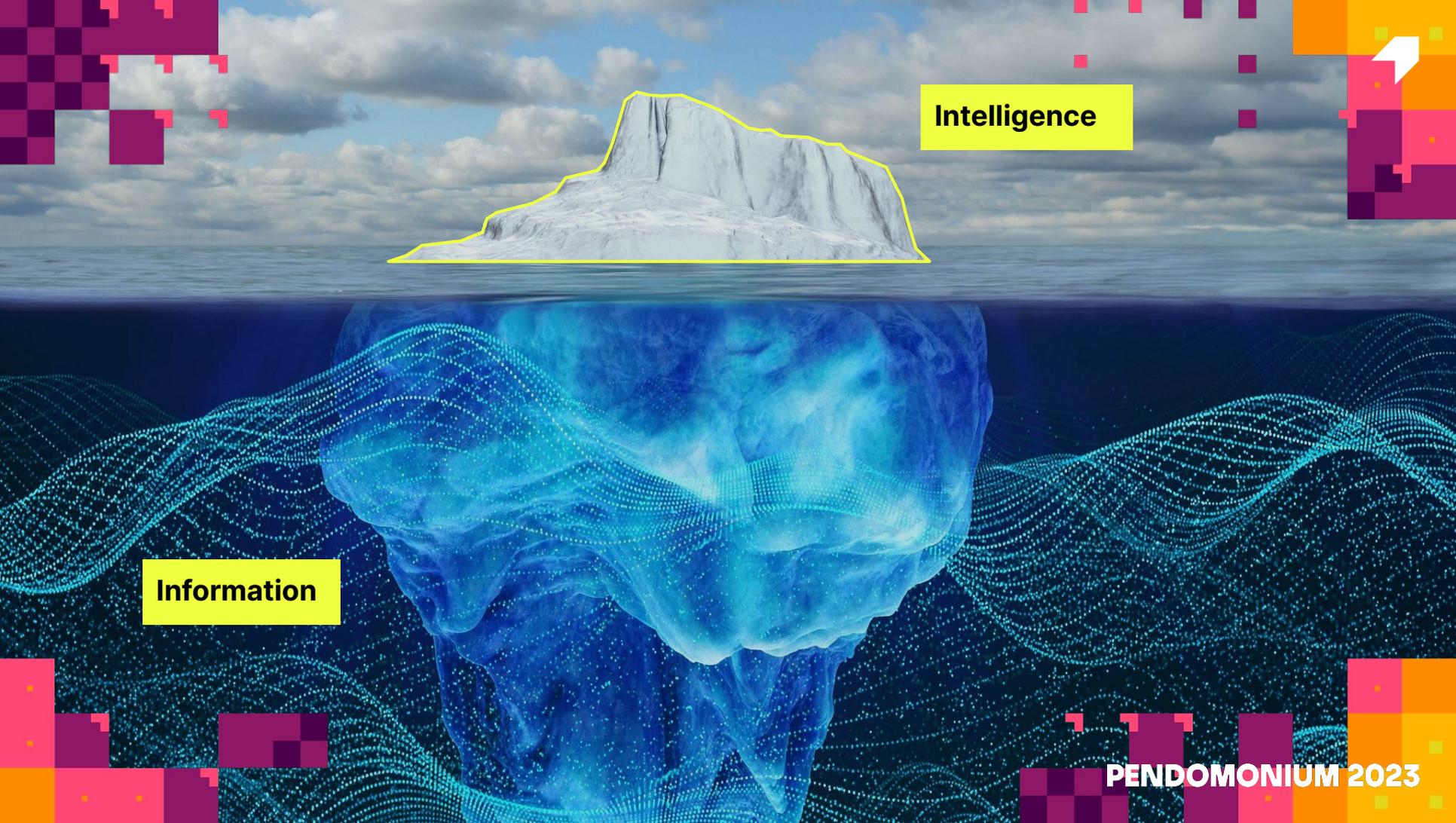
238

- Real Numbers (90 topics)
- Linear Equations and Inequalities (99 topics)
- Exams and Functions (80 topics)
- Systems of Linear Equations (42 topics)
- Exponents and Polynomials (60 topics)
- Factoring Polynomials (43 topics)
- Rational Expressions and Inverses (60 topics)
- Radicals (60 topics)
- Quadratic Equations and Functions (58 topics)
- Function Operations and Inverses (60 topics)
- Exponential and Logarithmic Functions (41 topics)
- Conic Sections and Sequences (41 topics)

Mc Graw Hill Education ALEKS®



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An iceberg floating in the ocean. The tip of the iceberg is above the water, and the much larger base is submerged. The submerged part is rendered with a blue, digital, point-cloud-like texture. The sky is blue with white clouds. The image is framed by a colorful, pixelated border in shades of purple, pink, and orange.

Intelligence

Information

PENDOMONIUM 2023

The Pendo AI journey



⚡ GPT-3.5

⚡ GPT-4 🔒

ChatGPT



How can AI automate a product managers job



AI can automate certain aspects of a product manager's job, such as market research, data analysis, demand forecasting, competitor analysis, customer segmentation, personalization, A/B testing, inventory management, and more. It can assist in making data-driven decisions, optimizing processes, and enhancing customer experiences. However, AI cannot fully replace the strategic and creative elements of a product manager's role, which involves setting product strategy, defining vision, and understanding qualitative aspects of customer needs. AI should be seen as a tool to augment a product manager's capabilities rather than replace the role entirely.



Actually our journey started 2 years ago....



1.2 trillion page loads

482 billion feature clicks

82 million poll responses

656 million guide views

22 million NPS survey responses



pendo **Simon**

PENDOMONIUM 2023

Data is at the core of our models



10K

Companies who
use Pendo

800M

People who use
applications installed
with Pendo everyday

20B

Unique data points
generated daily

16T

Total data points
fueling our AI models

And we take an ethical approach



Features	AI Model
<p>Enable NPS insights Use AI-generated insights for automatic creation and assignment of NPS themes and AI-based NPS summary generation.</p> <p><input checked="" type="checkbox"/> You can enable this feature only when your subscription has at least one active NPS survey. You must also enable NPS themes.</p> <p>Enabling this feature allows generative AI models to process your users' content.</p>	<p> Pendo AI</p> <p> Google Generative AI</p> <p> OpenAI</p>
<p>Enable guide writing assistant Use AI to proofread and edit guides. The writing assistant checks for spelling and grammar errors, provides tone options, and enhances vocabulary.</p> <p><input checked="" type="checkbox"/> Enabling this feature allows generative AI models to process your users' content.</p>	<p> Google Generative AI</p>
<p>Enable AI guide creation</p>	<p> Google Generative AI</p>

News

8 core principles for how Pendo uses AI

By [Chuck Kesler](#)

2m read
Published Jul 19,
2023

Security, privacy, and transparency are foundational to our approach.

[Learn more about Pendo](#)



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We're adding LLMs across Pendo



Create Segment

User friendly

Responses (428) Theme Distribution

Responses summary

Customers are looking for a more efficient and effective data analysis process to identify trends and patterns.

Current workarounds involve manual processes and limited charting capabilities in Excel.

Customers are disappointed with current products, with complaints about confusing user interfaces and slow performance, leading to incorrect or incomplete results. Improvements are needed for customers to continue using the product in the future.

Theme summarized from 418 responses.

Regenerate Copy Like Dislike

Sort by: By Date (Latest To Early) Filter by: All Responses

Acme Corp | johnr@acmecorp.xy | Oct 20, 2022 | 9

Pendo provides helpful analytics we wouldn't be able to get without it. I would love to see pendo use the same type of date selector throughout the whole product. Its a minor thing but it trips me up sometimes when i date select it is an action of the product

< Feedback Views | Change View >

Dashboards Feedback

The voice of customer for our Dine Dash dashboard area

View created by kevin.davis@dinedash.io

Insights Feedback items (145) Actions

Enterprise Power Users | All Time | All Apps

Feedback summary Pendo AI

Customers desire enhanced navigation features, including intuitive menus and clear labels. Customizable layouts and personalized dashboards are highly sought after.

Summary from 145 feedback items, with customers from the Enterprise Power Users segment, last updated by Pendo AI, Wed 21st June

Top labels

All Time | Everyone | Dine Dash | Enterprise Power Users

Edit Text

Theme Style

Paragraph

Font styles are set by the theme. You can break from the theme style by selecting "Custom".

GENERAL

Guide Content

B I U S | | |

I love Pendo!

Cancel Done



Intelligence



Automating manual tasks



Proactively surfacing insights
& recommendations

Identify manual tasks to automate



Content generation

Synthesize data

Testing

ories

Monitoring

Competitive analysis

Sunsettin

Personalization

Customer feedback analysis

Building

oring

Releasing

Customer interviews

Prototype ge

User stories

Testing

Product-led growth



Recommend actions to take



Insight

Recommended action

Users of a certain feature have the highest retention



Create a campaign to increase usage of that feature

Onboarding for one segment is slower than average

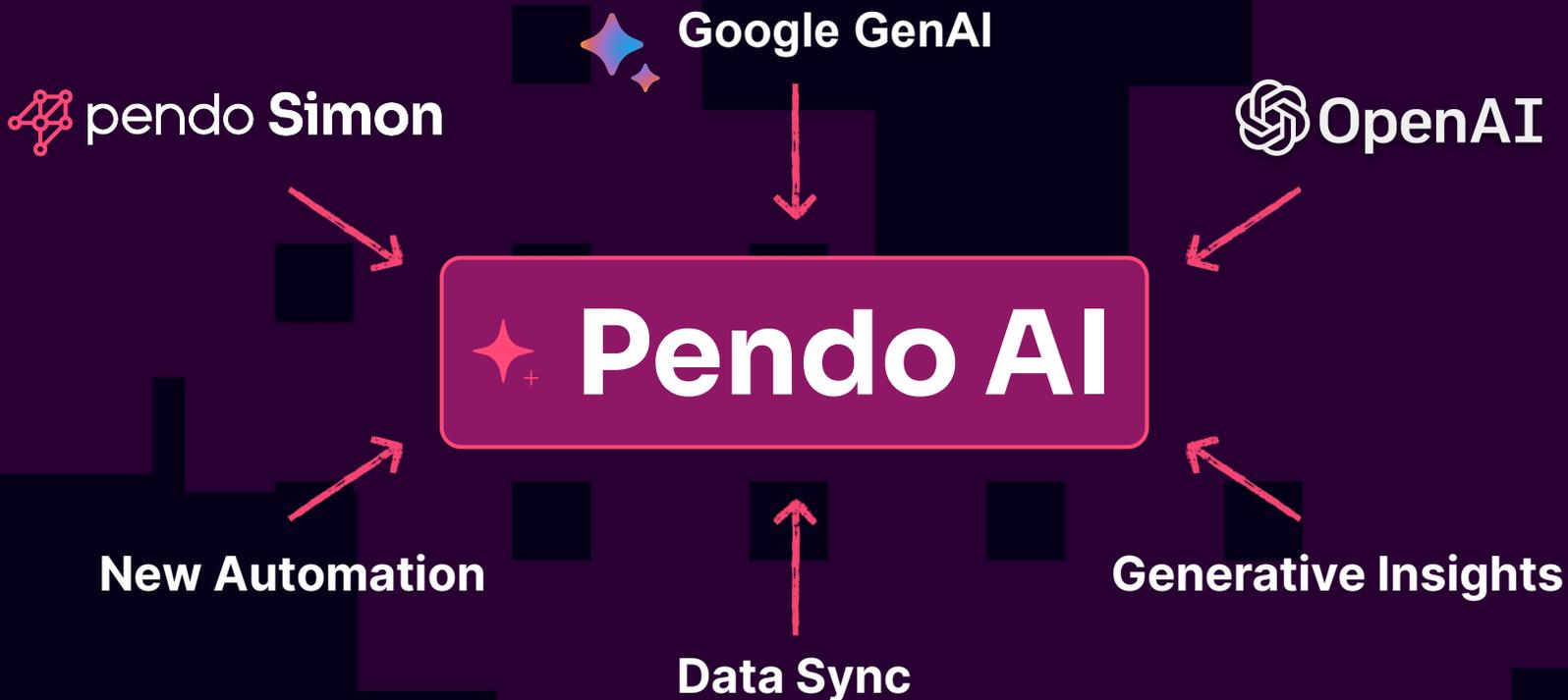


Optimize and personalize onboarding flow

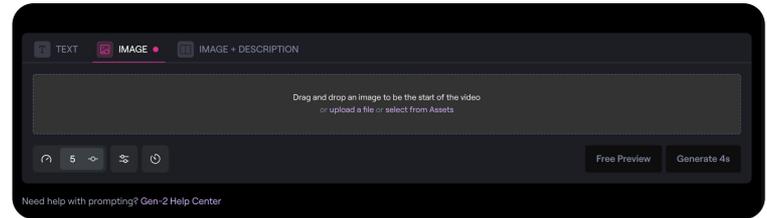
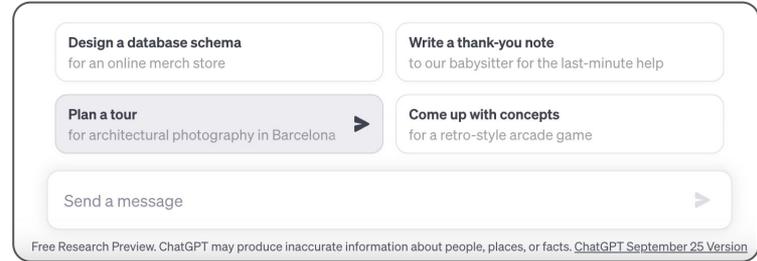
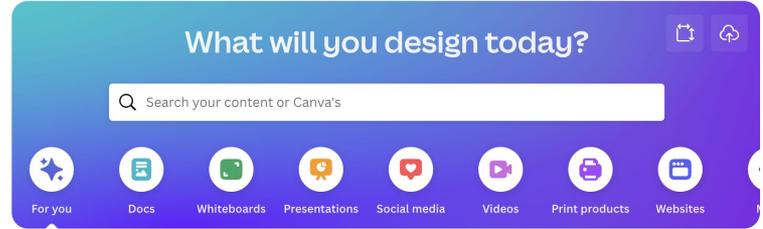
Free users convert at a higher rate after viewing pricing page



Create a guide to drive awareness of plans



Is the future of UI LLM-based?



N FILM

The Wonderful Story of Henry Sugar



Play



More Info



PG

New Releases



Top Picks for Jess





How we're helping you **break away** with AI



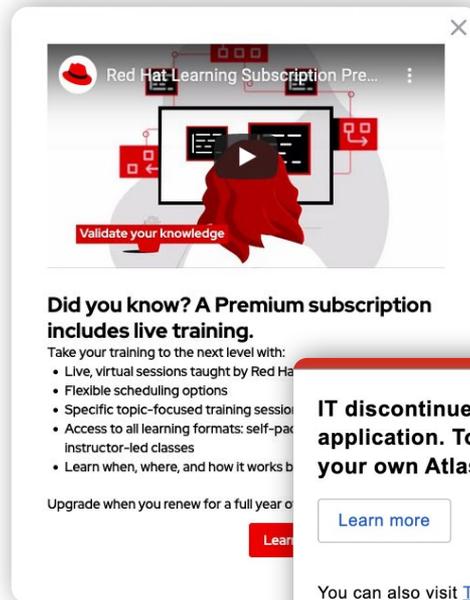
**“AI-enabled products
will provide the optimal
user experience by
going ‘full stack’.”**

Fraser Kelton
Former Head of Product at OpenAI

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We need to provide optimal user experiences

Across the apps we buy, build, and sell



Red Hat Learning Subscription Pre...

Validate your knowledge

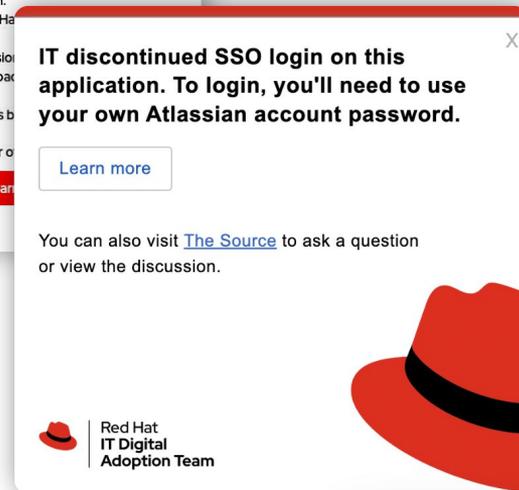
Did you know? A Premium subscription includes live training.

Take your training to the next level with:

- Live, virtual sessions taught by Red Hat
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Learn more

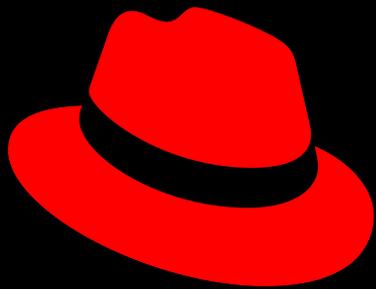


IT discontinued SSO login on this application. To login, you'll need to use your own Atlassian account password.

Learn more

You can also visit [The Source](#) to ask a question or view the discussion.

Red Hat
IT Digital
Adoption Team



PENDOMONIUM 2023



INTRODUCING

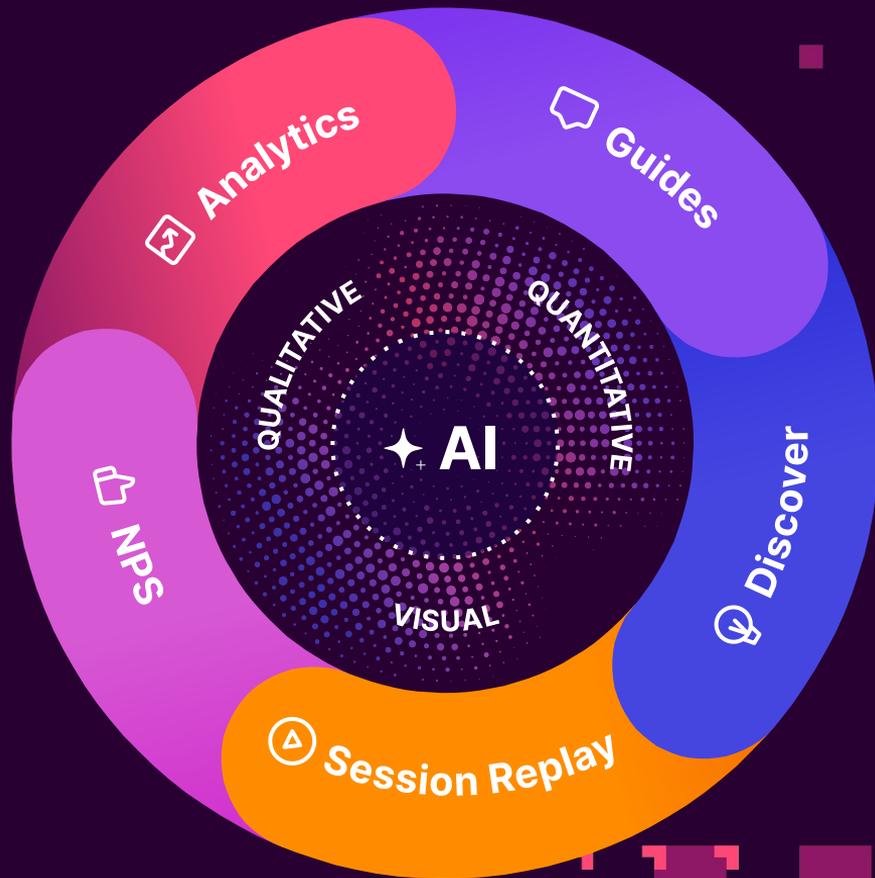
pendo one

A unified application experience
platform with AI at the center

PENDOMONIUM 2023

 pendo one

Application Experience Platform



PENDOMONIUM 2023



Our AI themes



**Personalized
content**



**Product
discovery**



**Product-led
outcomes**



The age of intelligence requires new muscles

Join our customer community

Connect on Slack

6,900+
Pendo Connect
members

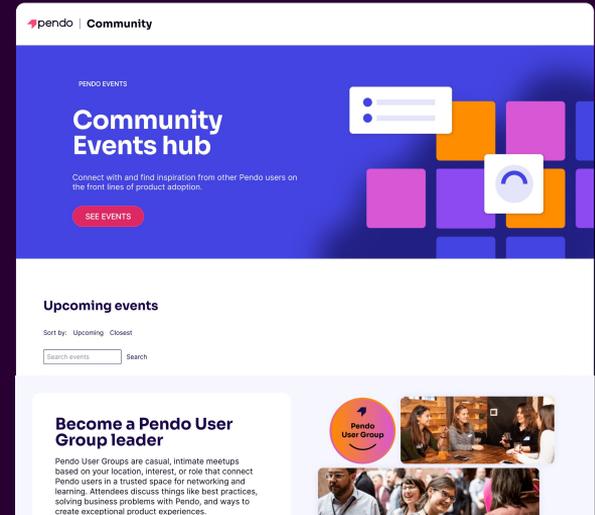
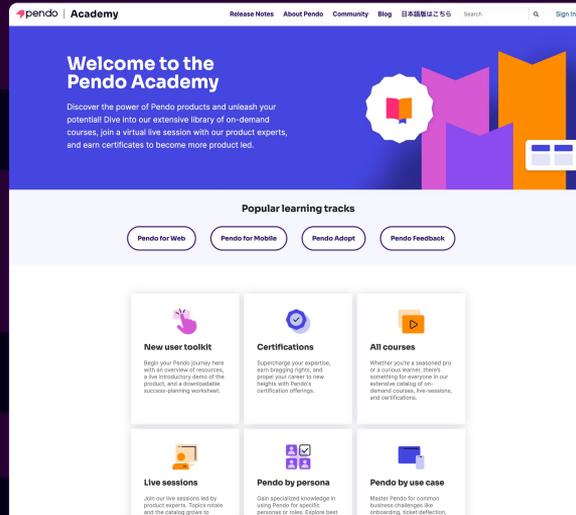
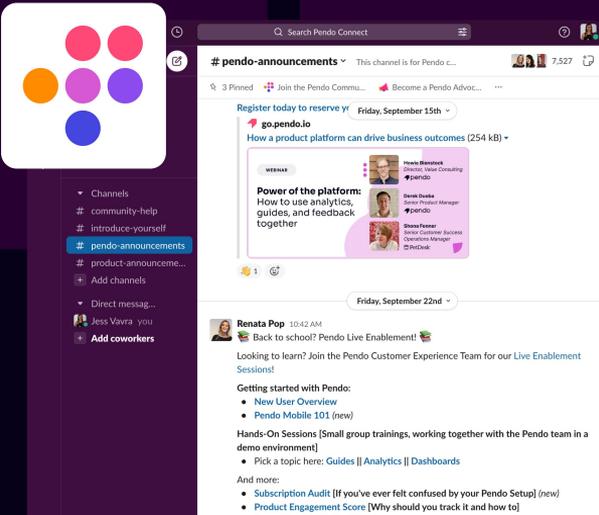
Take a course

120+ courses
2 Pendo certifications
2,290 users certified

3rd coming
soon!

Join a user group

8 User groups
186 participants





Enable and train your team

Establish a foundation with training from Mind the Product

- ✔ Product Management Foundations
- ✔ Communications & Alignment
- ✔ Metrics for Product Managers

Implement Pendo effectively with Professional Services

- ✔ Onboarding
- ✔ Strategy consulting
- ✔ Expert services
- ✔ Product advisory

INTRODUCING The AI knowledge hub

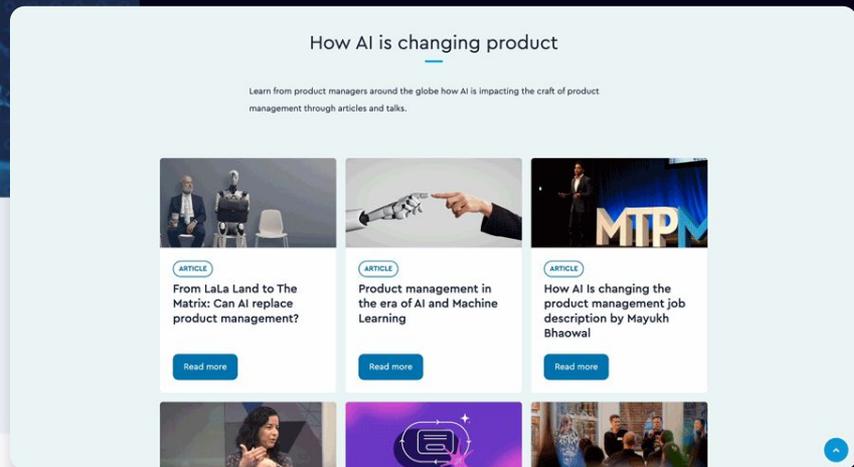


AI is the talk of the town at the moment, with many product people wondering what it is, where it came from, and how it will affect our jobs. Use this page to access everything that Mind the Product, guest product managers, and AI experts have to say about the conversation.

Throughout the Mind the Product site, you'll find content to give you a grasp of the state of AI. On this page, you can access all the AI information in one place. Browse this page to find information on what AI is, how it is changing products, and read a few case studies on how product teams have used this to revolutionise their craft.

State of AI in product management

Opinions and conversations on what impact has had on product management, and predictions on what will happen in the future.



Get certified!

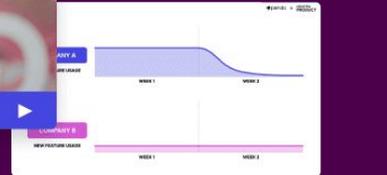


100K

Total registrations

15K

Total certifications



Google Cloud

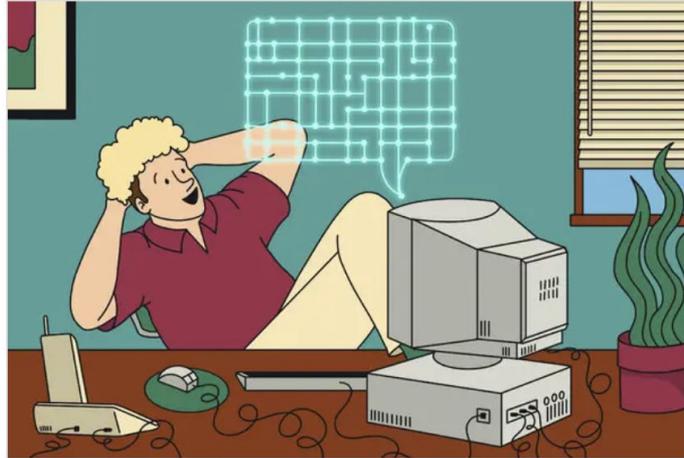
pendo mind the
PRODUCT

AI for Product Management

.....
**COURSE
COMPLETED**
.....

PENDOMONIUM 2023

- 
- **Focus on fundamentals**
 - **Solve user pain**
 - **Find your golden use cases**
 - **Leverage first-party data as your moat**



A.I. Is Having a 'Netscape Moment'



Pui-Wing Tam
Reporting on tech

As Silicon Valley has been gripped by a frenzy over artificial intelligence, some techies have been trying **to put this latest tech boom into perspective**. One way to think about it is as A.I.'s "Netscape moment."

Here's what that means →

Melanie Lambrick




WORLD.COM


GeoCities


webvan™

 **pets.com**

PENDOMONIUM 2023



FUJIFILM

ebay

amazon

priceline®



Trisha Price

Chief Product Officer

Today, product teams must drive the business

Outputs

Build, deploy, and
celebrate



Outcomes

Solve business problems
and keep going



“Early on I realized that Product sits at the heart of any business that builds software. If you want to have a bigger impact, you need to be a business leader and not just an executor.”

Amanda Grant, CPO Advanced Software

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What's holding your teams back from achieving outcomes?

1

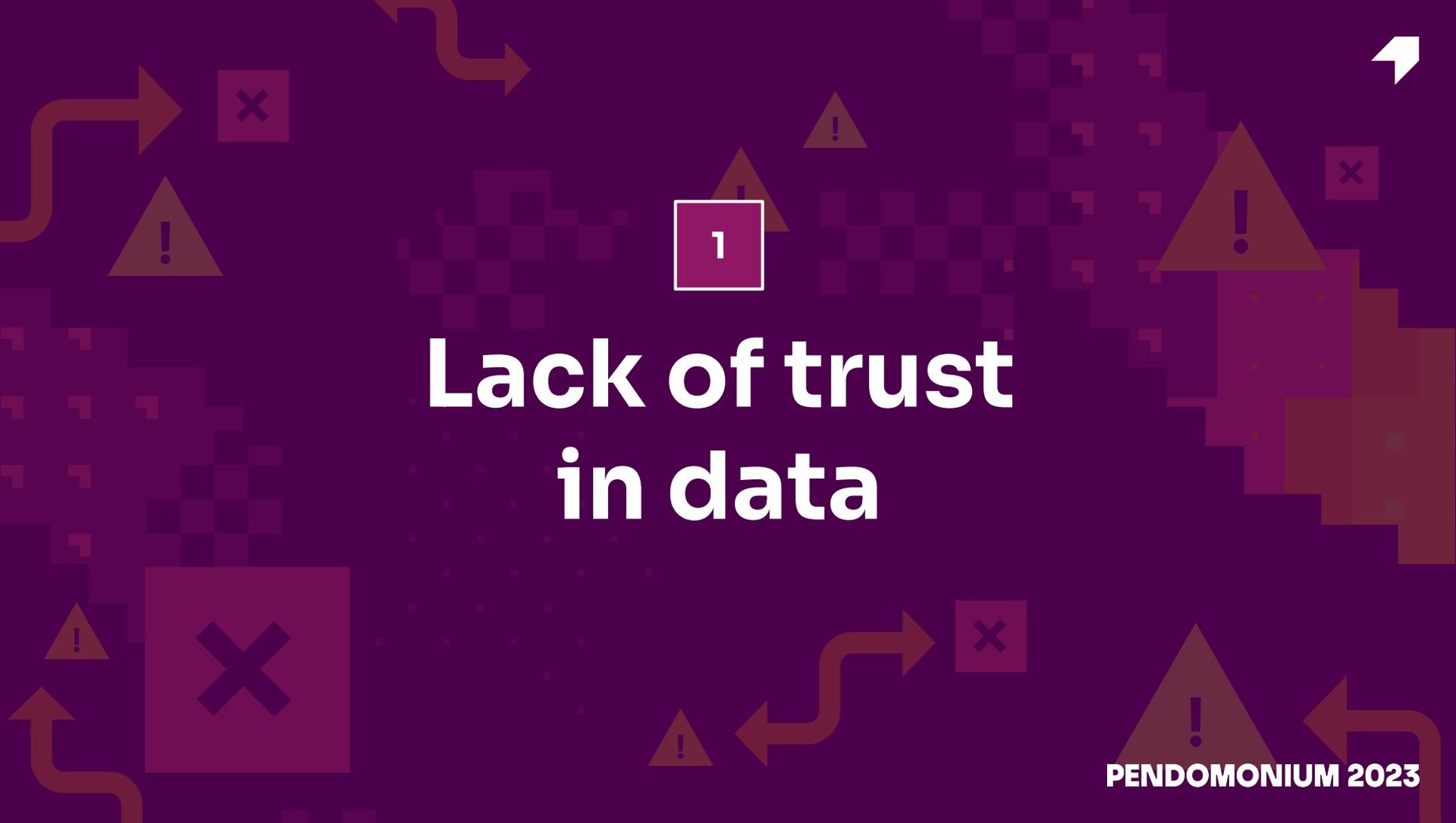
Lack of trust in the data

2

Can't find signal in the noise

3

Unable to take action



1

Lack of trust in data



2

Can't find signal in the noise

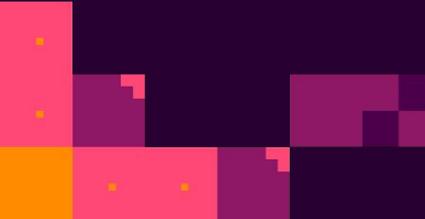
3

Unable to
take action

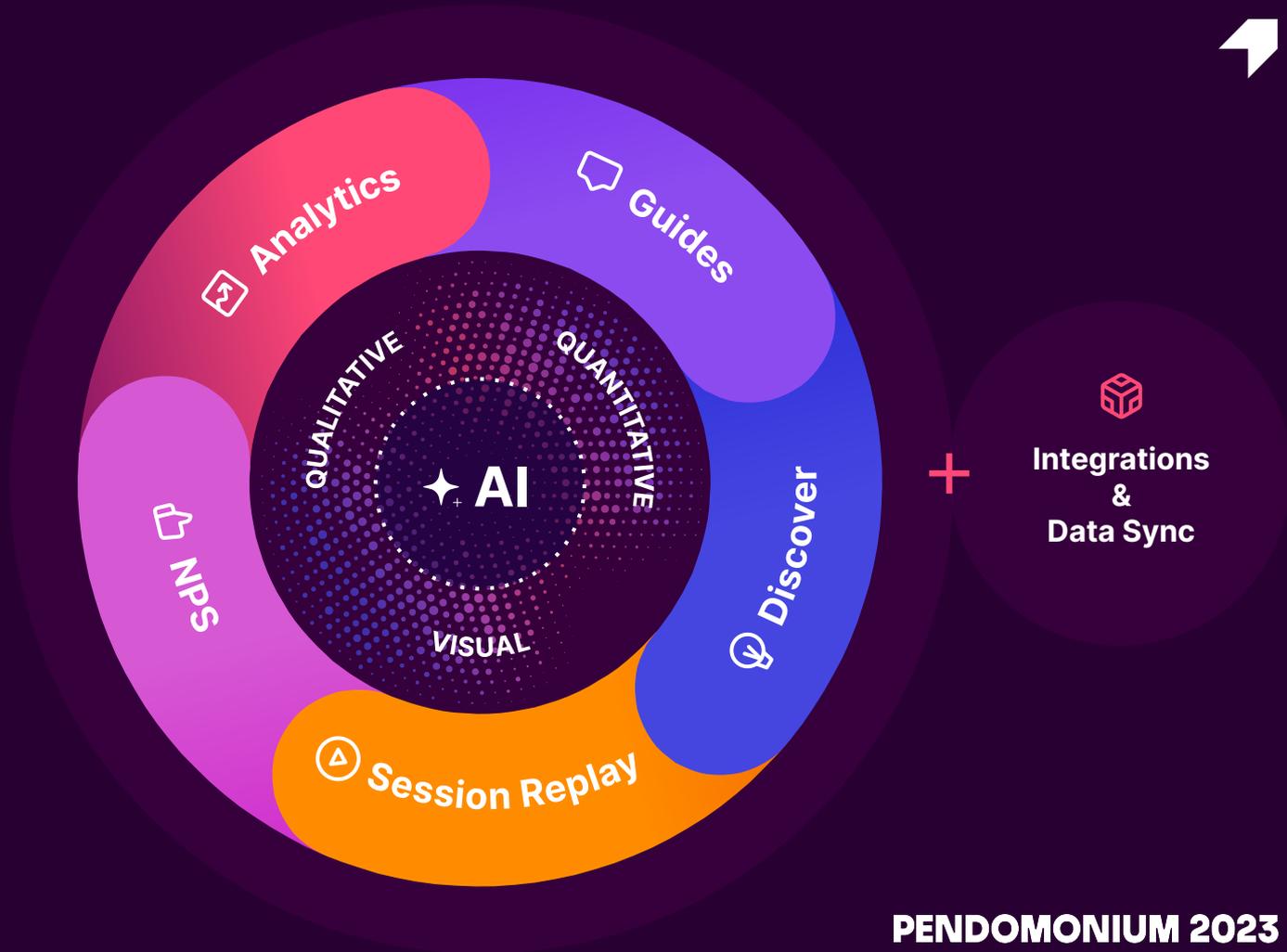


It is time to ride the wave

PENDOMONIUM 2023



pendo one
Application
Experience
Platform





Building trust and confidence

Introducing Session Replay

← Back to library Event Filters - Learn More, Upgrade + 4 More

Replay 2 of 6 ⏪ ⏩ ☆ Share

Good Afternoon, Victor!

Accounts Investments Transfers

CONTACT INFORMATION

First Name: ***** Last Name: *****
Phone: ***-***-**** Email: *****@*****

BILLING INFORMATION

Street: *****
City: ***** State: AA Zip Code: *****

Mortgage Loan

Principal Balance: **\$544,846.78** Payment Due: **August 01, 2020** Payment Amount Due: **\$2,286.80**

MAKE A PAYMENT VIEW STATEMENTS GO PAPERLESS

Set up automatic payments [here](#)

POSTED ACTIVITY

Date	Description	Amount	Balance
July 15	Payment	\$2,286.80	\$544,846.38
July 01	Payment	\$2,286.80	\$545,375.37
June 15	Payment	\$2,286.80	\$546,953.93
June 01	Payment	\$2,286.80	\$547,292.33
May 15	Payment	\$2,286.80	\$547,292.33
May 01	Payment	\$2,286.80	\$547,292.33
Apr 15	Payment	\$2,286.80	\$547,292.33
Apr 01	Payment	\$2,286.80	\$547,292.33
Mar 15	Payment	\$2,286.80	\$547,292.33
Mar 01	Payment	\$2,286.80	\$547,292.33

Victor@acme.co
Acme Company

Visitor and account metadata

- Usage trending: ↗ 70%
- Email: Victor@acme.co
- First visit (All apps): May 4, 2019
- Role: Financial analyst

Hide details ^

Event Log

- Browser: Chrome
- Operating system: Mac OS
- Start time: August 22, 2023 at 11:13 AM EDT
- 00:00 Device screen size is 1440px by 880px
- 00:01 Clicked Learn More
- 00:06 Viewed Untagged Page
- 00:07 Clicked Upgrade
- 00:10 Viewed Price Comparison
- 00:14 Clicked Paid Plans

1 more matching feature...

08:00 / 32:00 Skip Inactivity ⚙️ ✎️ 🔍

MacBook Air

Get the full picture



QUANTITATIVE

Measure how users behave



QUALITATIVE

Understand user behavior in their words



VISUAL

Watch the actual user behavior play out in context



Take action on insights

Announcing Pendo Discover

The screenshot displays the Pendo Discover interface for a dashboard titled "Dashboards Feedback". The dashboard is designed to help users understand customer feedback and generate ideas for improvement. It features a sidebar with navigation icons, a top navigation bar with "Ask Pendo AI" and "Search Discover" options, and a main content area with several key sections:

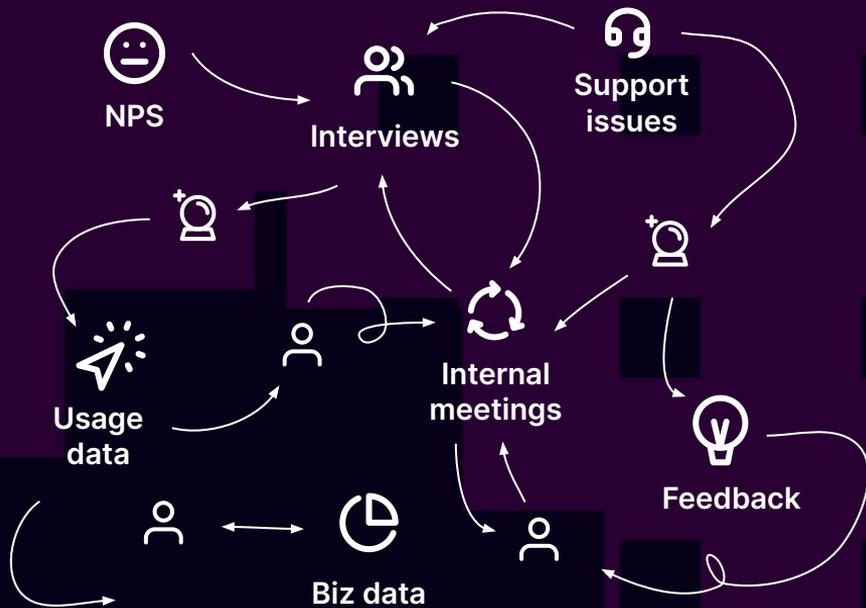
- Feedback Views:** Includes a "Change View" dropdown and a "Submit Feedback" button.
- Insights:** Shows "Feedback items (145)" and "Actions".
- Filters:** Includes "Enterprise Power Users", "All Time" (with a toggle), and "All Apps".
- Feedback summary:** A text-based summary of customer feedback, mentioning a desire for enhanced navigation features. It includes a "Pendo AI" label and a "Summary from 145 feedback items" note.
- Visitor behavior:** A section with four key metrics: 45 Visitors, 16 Accounts, 4m Average time on app, and 1165 Average no. of events.
- Top labels:** A section with filters for "All Time", "Everyone", "Dine Dash", and "Enterprise Power Users", and a bubble chart visualization.
- Ideas to consider creating:** A section where AI-generated ideas are presented, such as "Live Order Tracking".

The laptop displaying the dashboard is a MacBook Air.

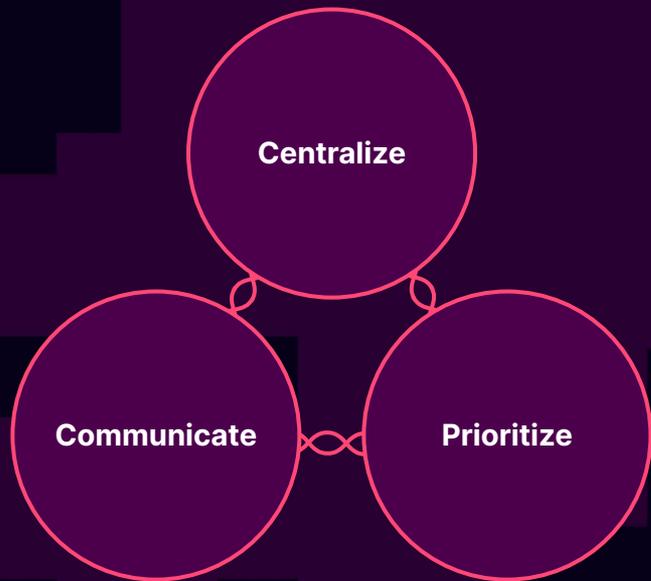
Prioritize with confidence



How it is



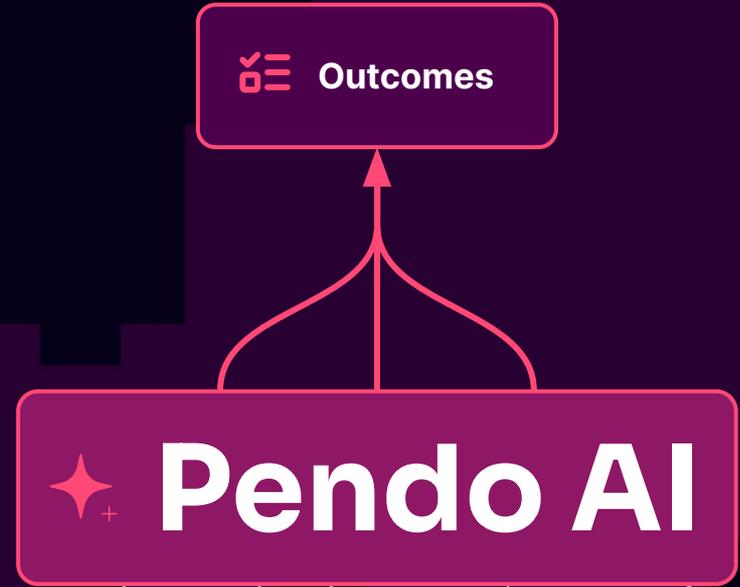
How it should be



Signal overload



**Intelligence
helps you drive
outcomes**





Find signal in the noise

Introducing Pendo AI



**Personalized
content**



**Product
discovery**



**Product-led
Outcomes**

The future Pendo



Dashboards

Product

People

Behavior

Guides

Replay

Discover

Portfolio

Subscription

Settings

Collapse

Outcomes

+ Create new outcome

Overview

Objectives

Recommendations

★ Recommended action

Increase retention

Audience focus:
Enterprise accounts on Acme.co

Campaign outcome:
AcmeExplorer usage +15%

Why:
AcmeExplorer users are your most highly retained of all

+ Create campaign

Snooze

★ Recommended action

Accelerate onboarding

Audience focus:
Commercial accounts on Acme.co

Campaign outcome:
Verify 3 friction points found

Why:
Commercial onboarding is 12% slower, on average

🕒 Review replays

Snooze

★ Recommended action

Increase conversion

Audience focus:
First 30 days visitors on Acme.co

Campaign outcome:
View plan comparison page

Why:
This appears to be a major 'Aha!' moment for Free users who convert

+ Create campaign

Snooze

✦ Pendo AI:

- 1 **Identifies** which features increase retention
- 2 **Recommends** a smart list of users to target
- 3 **Generates** actions to take to reach your goal



Overview

Objectives

Recommendations

✦ Recommended action

Increase retention

Audience focus:

Enterprise accounts on Acme.co

Campaign outcome:

AcmeExplorer usage +15%

Why:

AcmeExplorer users are your most highly retained of all

+ Create campaign

Snooze

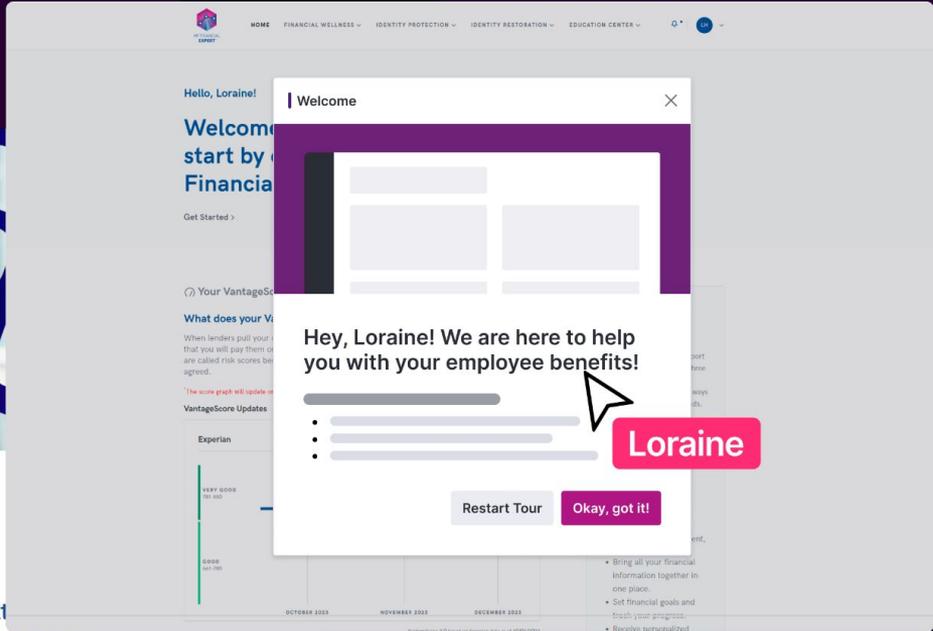
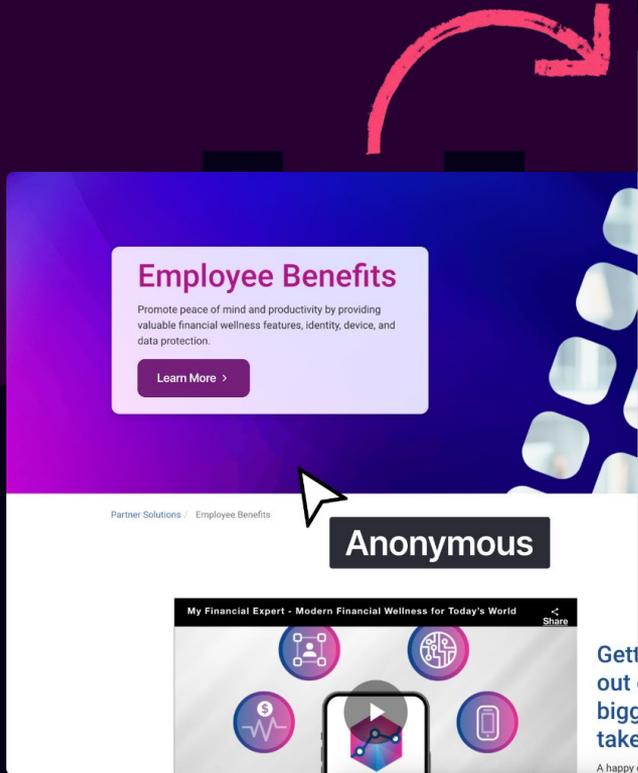
Even more innovation is coming, thanks to you

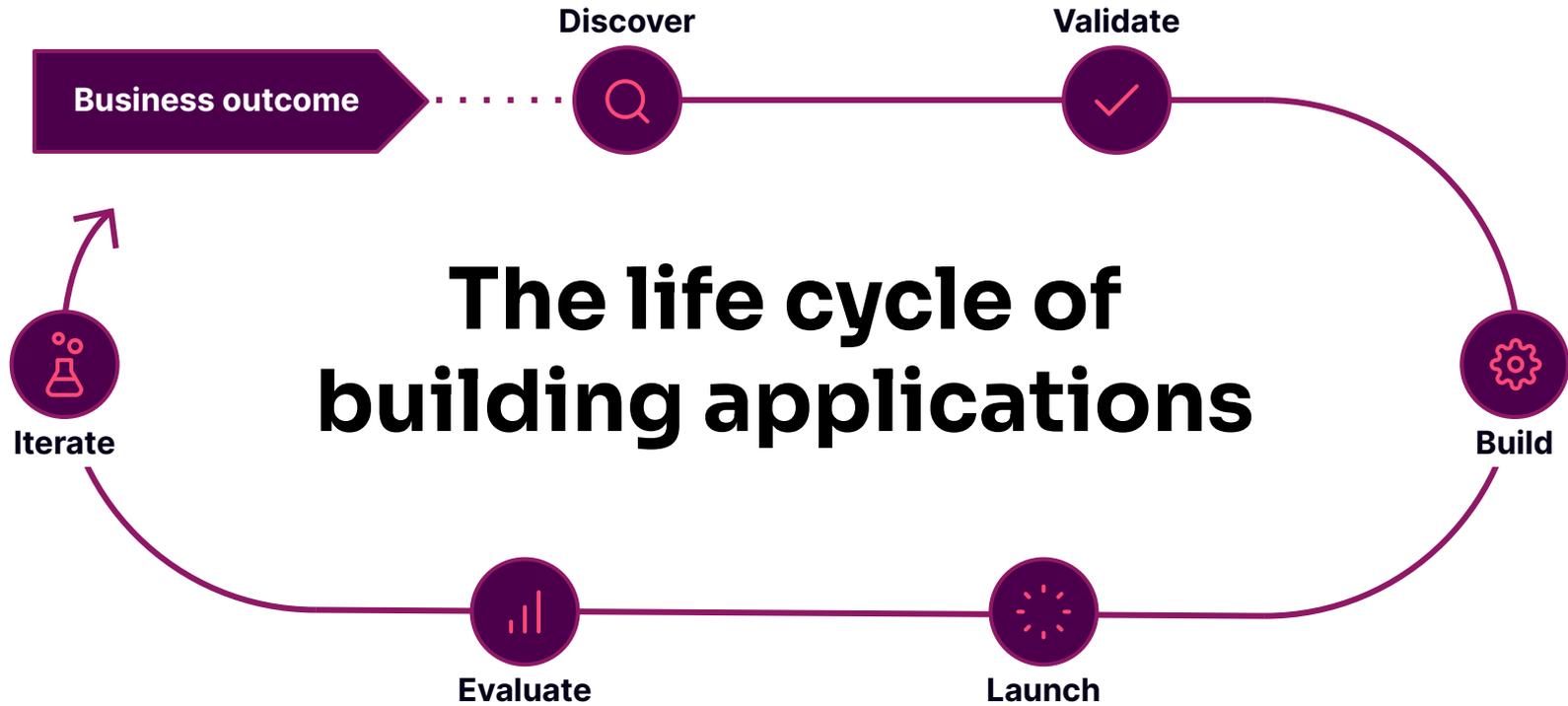


Requests (6705)

Request	Status	Votes	App	Product Area
Anonymous to known visitor journeys	● Building	254		■ Visitor Analytics
Add/View Paths and Funnels on a D...	● Planned	228	📱 Pendo Enga...	■ Dashboard
Screen Resolution capture	● Awaiting Fee...	188	📱 Pendo Enga...	■ Event Properties
Segment users by Day # in product	● Awaiting Fee...	175	📱 Pendo Enga...	■ Segments
Multi Select Polls (select multiple an...	● Awaiting Fee...	160	📱 Pendo Enga...	■ Guides
Conditional Guide Branching	● Awaiting Fee...	154	📱 Adopt + 1 more	■ Adopt In-App Help + 1 more

Connect an anonymous visitor to a known user







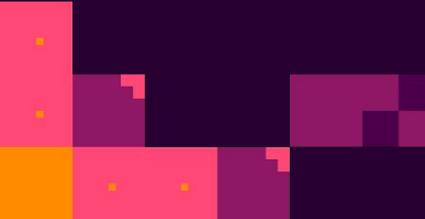
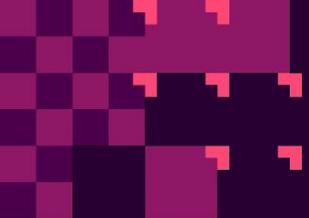
Brian Walsh

SVP, Product

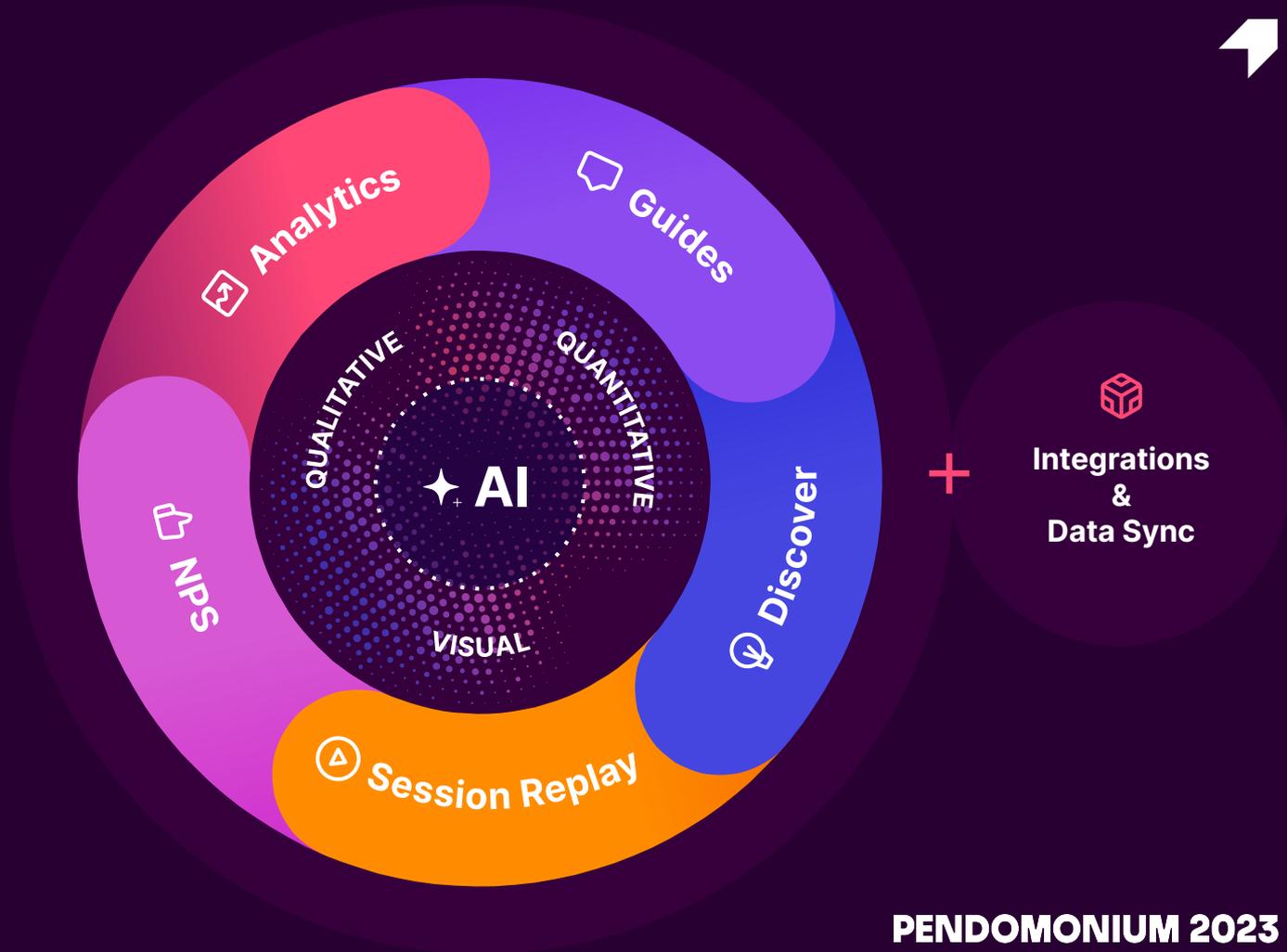


Clay Miner

VP, Global Sales & Value Engineering

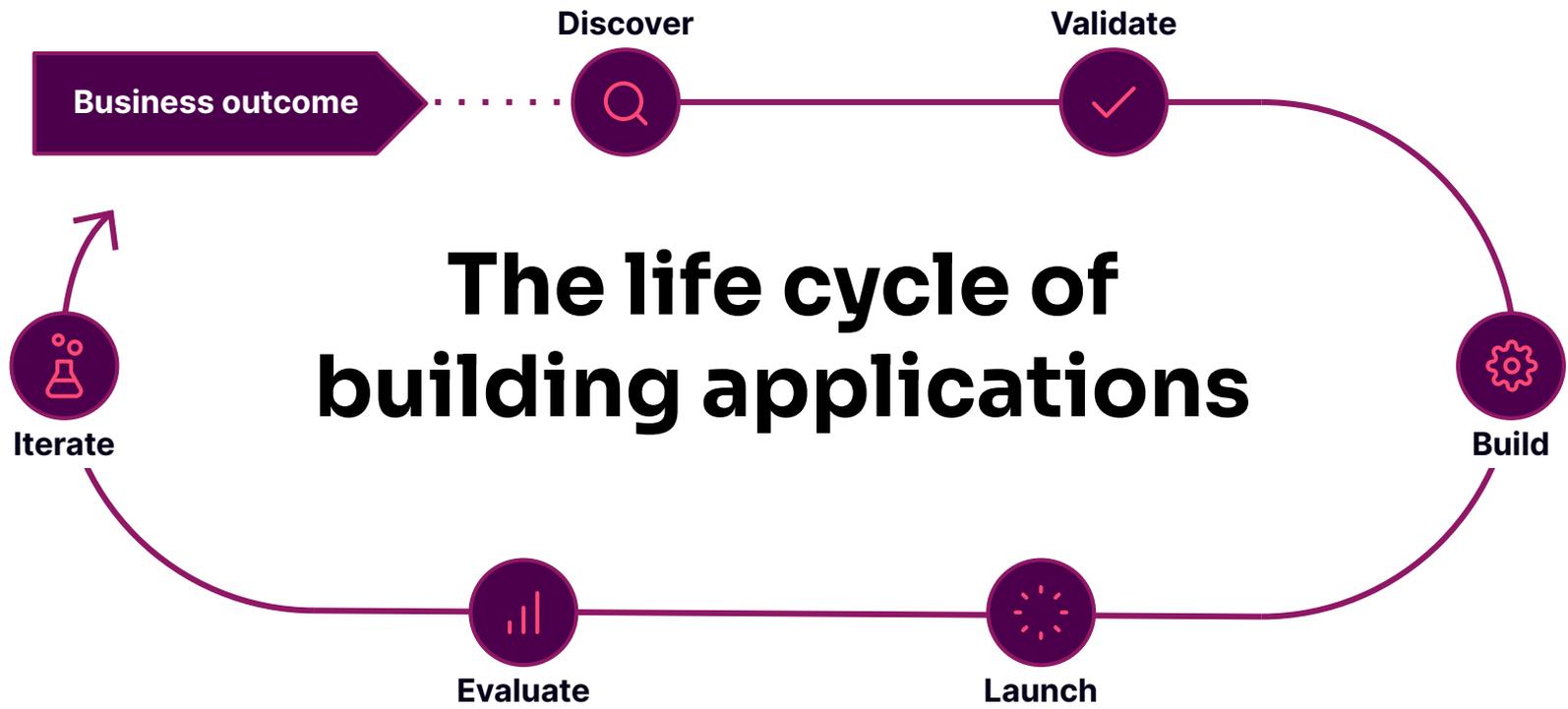


pendo one
Application
Experience
Platform

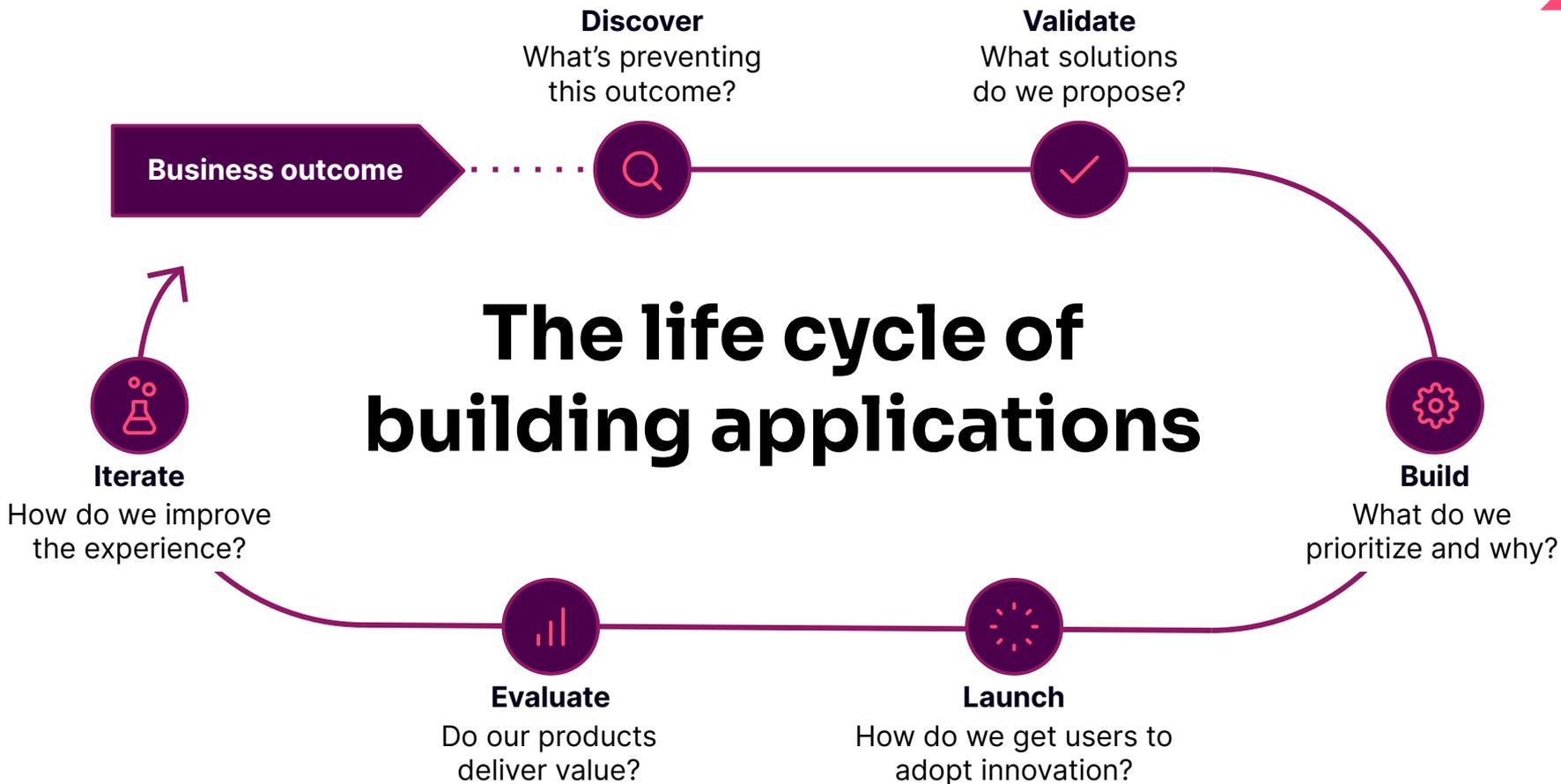




Carry the wave forward



The life cycle of building applications





Meet Pam



♥ Pam's Dashboard View Only

Owned by [addie.jackson@pendo.io](#)

Pam's dashboard using all of the goodness of the Pendo platform.



Share

Segment is [Premier Networks - ...](#) ✕ [Add Filter](#)[Clear Filters](#)

What to Look For

★ **How to use this dashboard:** Monitoring our main product area: the Add New Patient workflow. Key links and reports are here at the top. Followed by our usability survey with feedback collection, and NPS monitoring as well.

🔗 Key Links

Path to monitor: [Click Here](#)

- What are actions being taken in the Add New flow? Where is there potential regression or confusion? What actions are being taken before users begin to add a new patient?

Funnel to Monitor: [Click Here](#)

% of Visitors Using Add New Flow

[View in Data Explorer](#)Last 30 Days | Daily | [Premier Networks - Current](#) ▾ 1

* One or more events don't match up with selected y-axes. This could lead to misinterpretation of the chart or data.



Funnel to Track

Key Clients | Last 30 Days | Total Attempts



This website uses cookies, pixel tags, and local storage for performance, personalization, and marketing purposes. Our use of some cookies may be considered a sale, sharing for behavioral advertising, or targeted advertising. For more, see our [privacy policy](#). **California Residents** can learn how personal information is collected, including how it is used, whether it is "sold" or "shared", and how long it is retained.

[Opt out](#)

Funnel - Unique Visitors

🔍 Premier Networks - PNDM

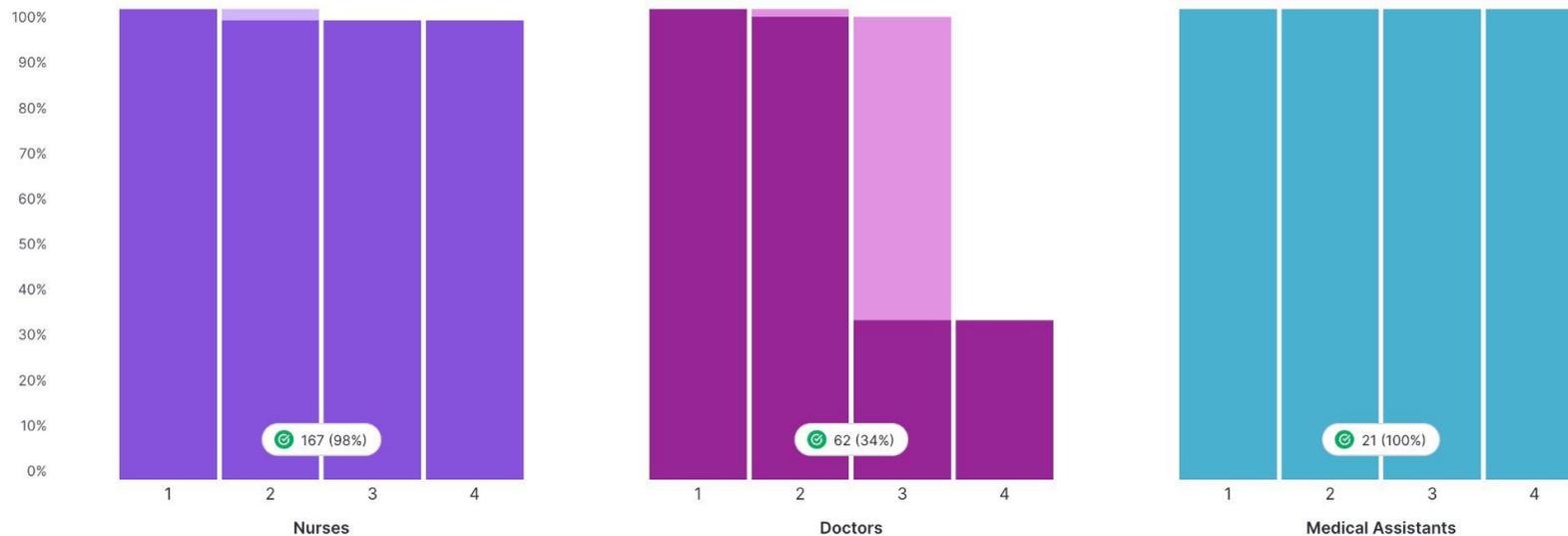
🎯 **82%**

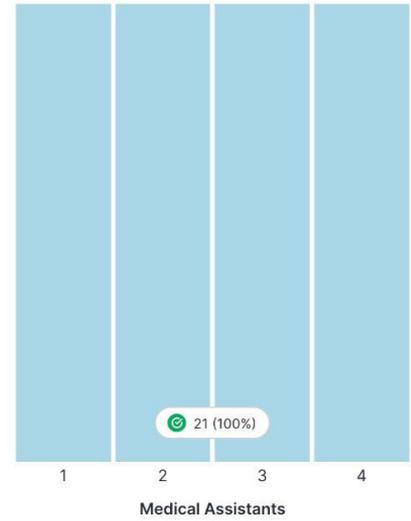
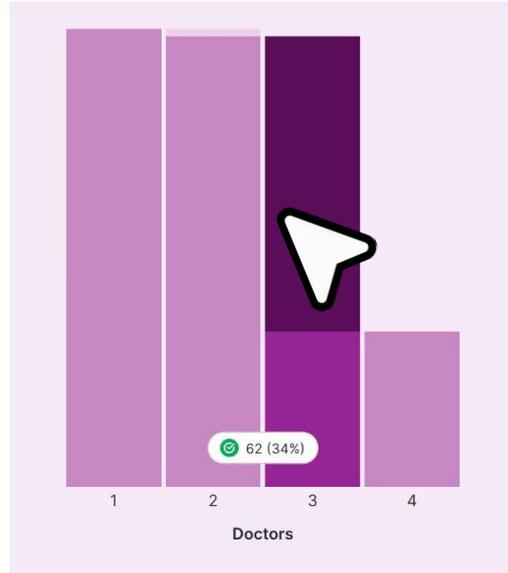
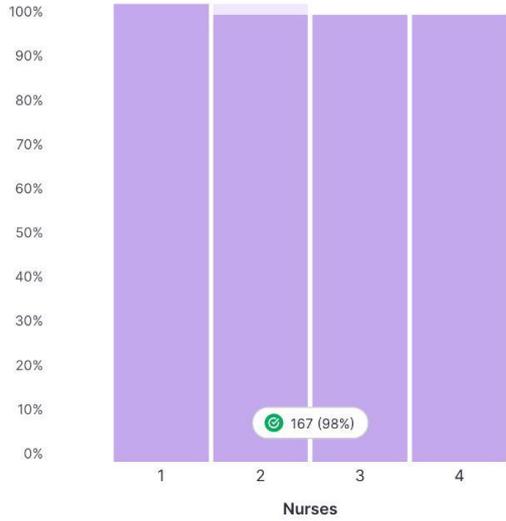
Completed funnel over last 30 days
205 of 250 unique visitors

🕒 **28s**

Avg time to complete funnel

All Groups





- 1: Create Record Button
- 2: Patient ID Field
- 3: Submit Button
- 4: View New Record

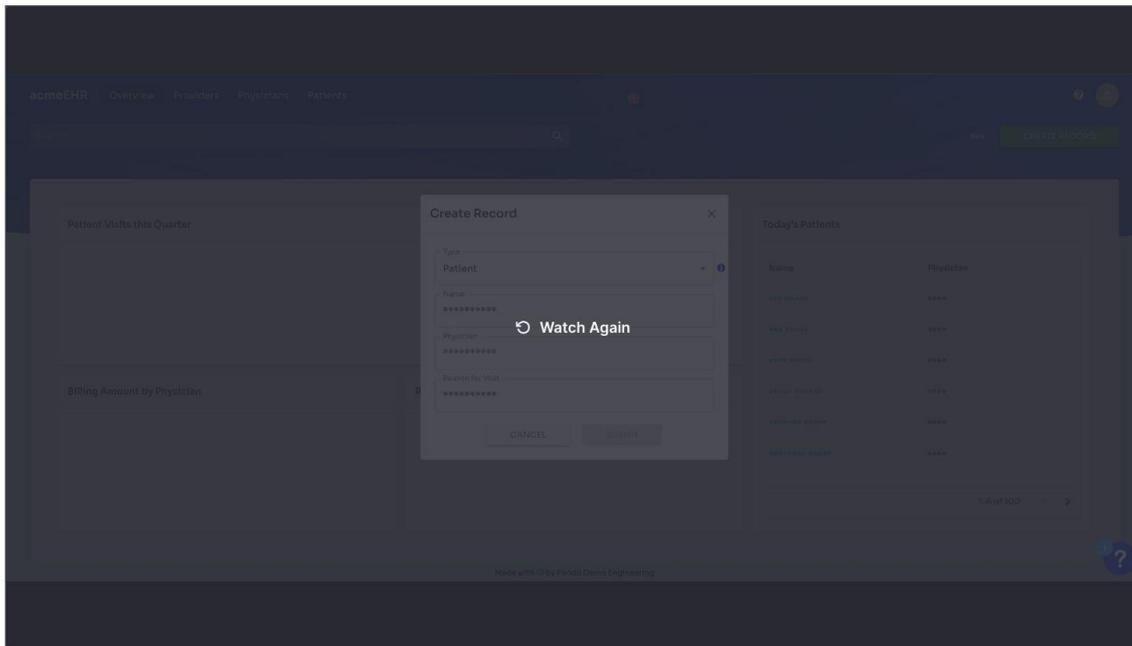
Step 3 Breakdown: Visitors who dropped before Submit Button (40) [Watch replay samples](#)

Visitor ID

Watch Replays

Sonya.Brady2023-09-18+demo@Rosefly.com





-10s +10s 2x 00:35 / 00:35 Skip inactivity

Event log

Browser: Chrome v117.0.0
Operating system: Mac OS X
Start time: Oct 9, 2023 11:02:13 PM GMT

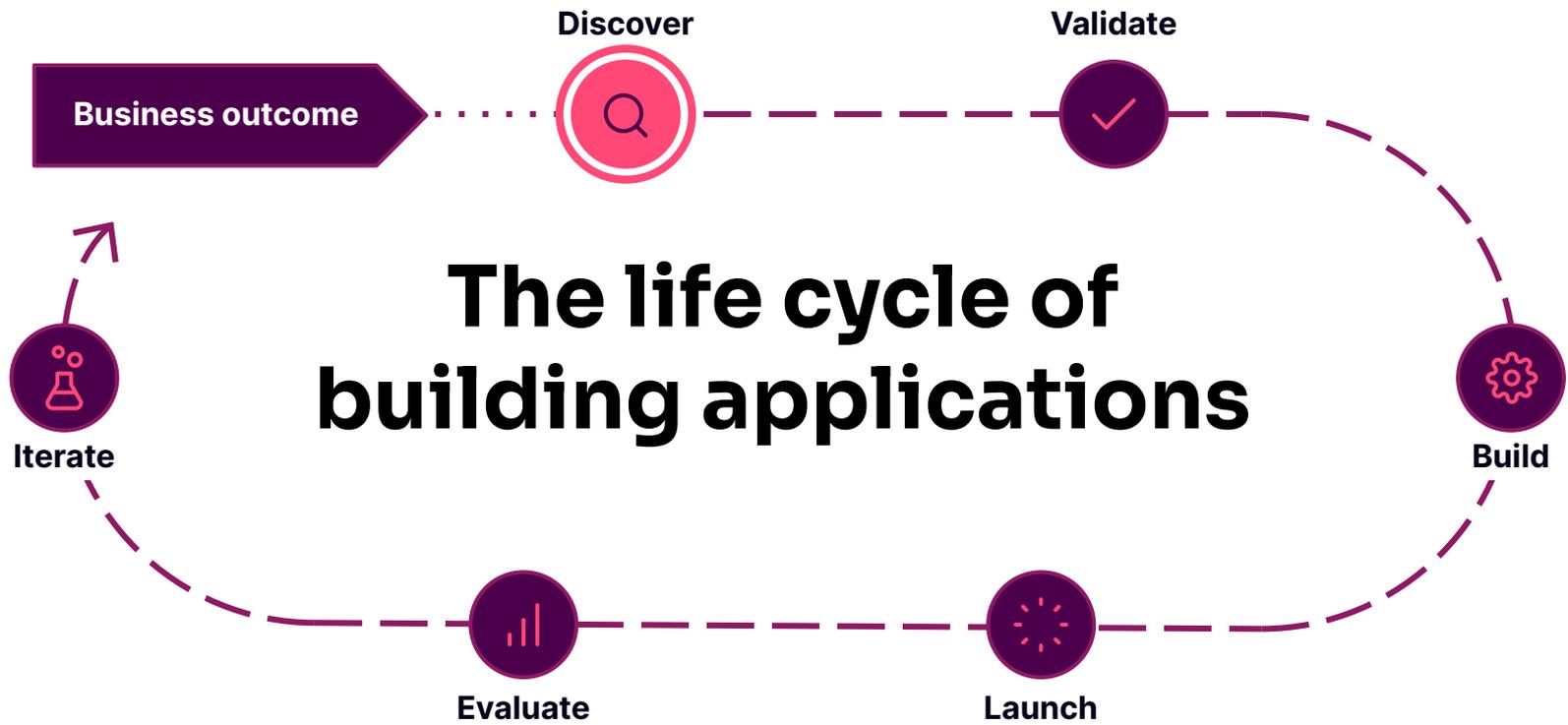
- 00:00
Device size is 1920px by 852px
- 00:00
Viewed Page with 2 matching rules
[2 Pages with matching rules](#) ▾
- 00:03
Clicked Create Record Button
- 00:03
Viewed Everywhere Except Patient List
- 00:05
Clicked Create Record - Field One
- 00:20
Viewed Page with 2 matching rules
[2 Pages with matching rules](#) ▾
- 00:21
Activated DEMO: AcmeEHR NPS - Guide Only Step 1
- 00:27
Activated DEMO: AcmeEHR NPS - Guide Only Step 2
[Resume auto-scroll](#)



“When I look at replays, I see more than numbers; It offers insights into how users uniquely interact with our product.

It’s mind-blowing to realize how Replay reveals these intricate user behaviors patterns we never anticipated.”

Laura Richardson | Viooh | Replay Beta User



The life cycle of building applications

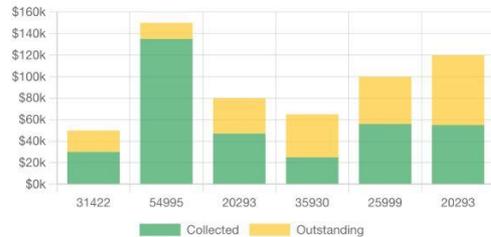
Search



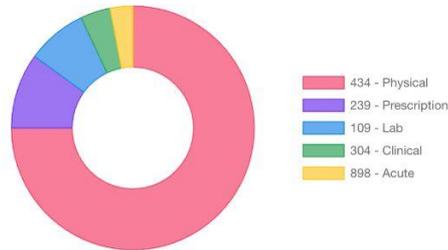
Patient Visits this Quarter



Billing Amount by Physician



Reason for Visit ★



Today's Patients

Name

Tom Smith

Amy Jones

Brad White

James Keller

Enrique Lopez

Mohammed Kumar

Julian George

Itai West

Juan Diego

Add New Patient Process Improvements

Help us prioritize which improvement to the patient creation workflow would provide the most value to you.

PROGRESSIVE COMPLETION

Implement a progressive form completion approach where us...

- Must have
- Nice to have
- Not interested



FORM AUTO-FILL

Enhance the workflow by intelligently predicting and sugg...

- Must have
- Nice to have
- Not interested

AUTOSAVE FORM PROGRESS

Imagine you're filling out a lengthy online application, ...

- Must have
- Nice to have
- Not interested

SUBMIT

Validate

Validate ideas

+ Create idea

Ideas Idea Tests **Analysis** ROI

Everyone

All Time

AcmeEHR

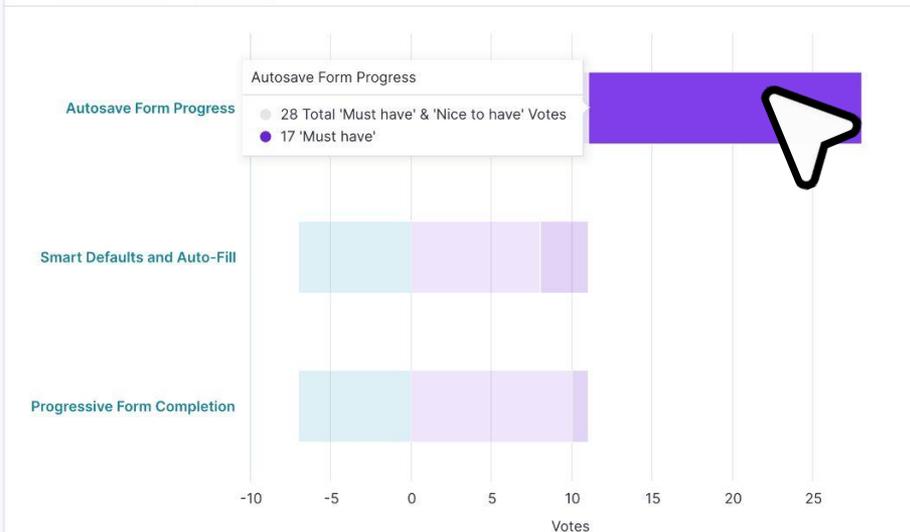
Search

All Product Areas All Statuses Created By Any Importance All Labels

Top ideas

Prioritize ideas

Top 10 Ideas by Votes



Idea

Like + Share

Close



Autosave

Autosave Form Progress

Idea created by addie.jackson@pendo.io on Sep 30, 2023

Overview **Votes 17**

Apply page filters

17 Votes **14** Accounts **732,870** value

Sphinx Solutions | Adriana092523-3@S...

Must have

Direct vote from **Validate Form Improvement Ideas**
14 days ago

Pizza Planet | Brooke090423-3@Pi...

Must have

Direct vote from **Validate Form Improvement Ideas**
14 days ago

Purrada | David090423-3@Pur...

Actions

Add a vote

Creating a feature

Promoting an idea to a roadmap will create a new feature which will appear on the selected roadmap's backlog and link it back to this idea.



Roadmap *

AcmeEHR Roadmap



Cancel

Add to roadmap

Autosave Form Progress

Idea created by addie.jackson@pendo.io on Sep 30, 2023

Overview

Votes 17

Apply page filters i ✓

17

Votes

14

Accounts

732,870

value

Sphinx Solutions | Adriana092523-3@S...

● Must have

Direct vote from **Validate Form Improvement Ideas**

14 days ago

Pizza Planet | Brooke090423-3@Pi...

● Must have

Direct vote from **Validate Form Improvement Ideas**

14 days ago

Purrada | David090423-3@Pur...

[Back to Roadmaps](#)

AcmeEHR Roadmap

Roadmap for the AcmeEHR product, including Pam's team!

BETA | [Give Feedback](#)



[Share](#)

[Backlog](#)

[+ Add to Roadmap](#)

Saving ...

< Q1 2024

Q2 2024 >

Enhancements

☆ Internationalization and Localization

⋮ ☆ Autosave Form Progress

☆ Medication Management

Core Functionality

☆ Data Analytics and Reporting

☆ Telehealth Capabilities

Roadmap Backlog (2)



☆ Feature

[View](#)

Medium Impact Feature

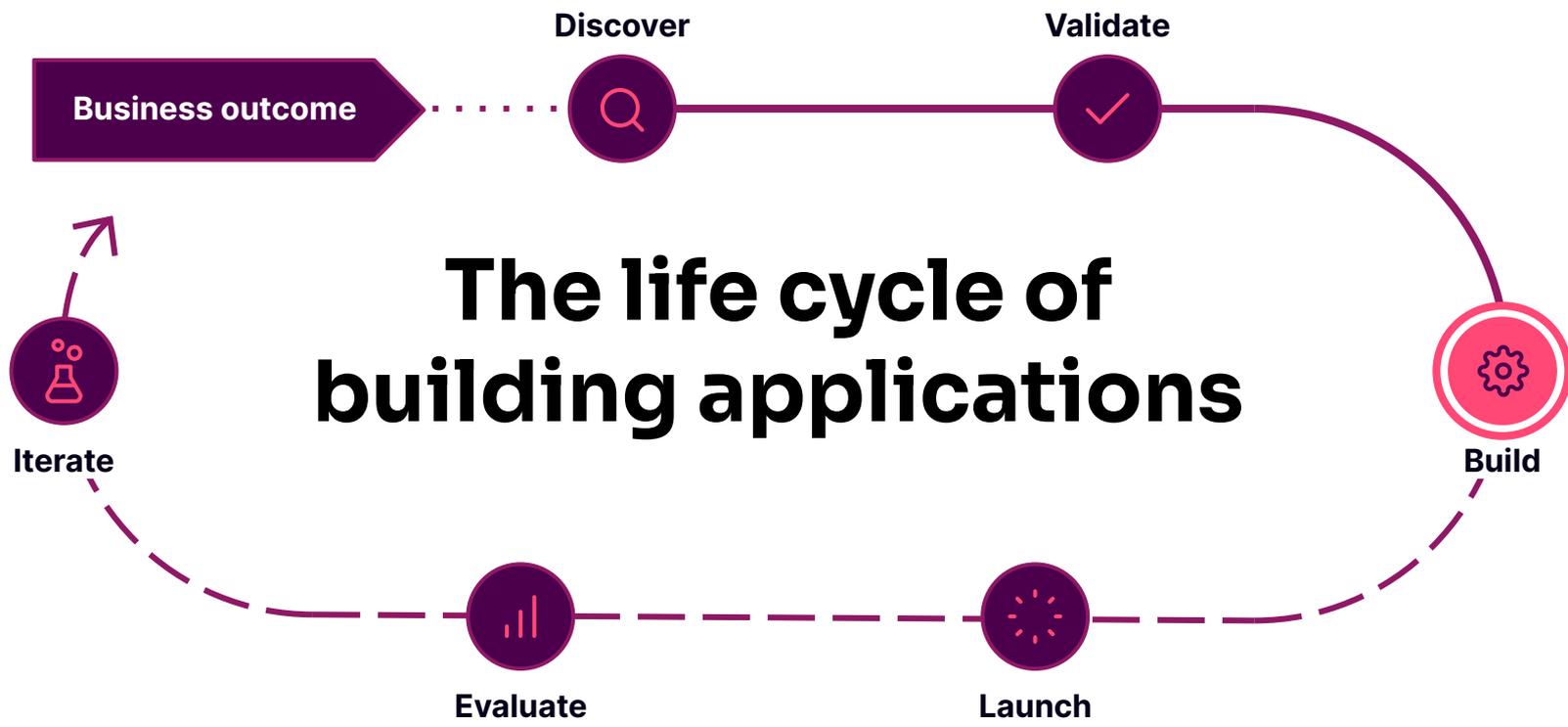
This won't impact every customer, but will be very meaningful to a certain segment.

☆ Feature

[View](#)

Super Cool Feature!

This is a great feature that would benefit every customer.



The life cycle of building applications



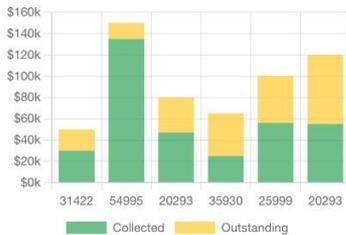
Search

CREATE RECORD

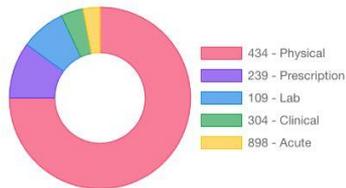
Patient Visits this Quarter



Billing Amount by Physician



Reason for Visit



Today's Patients

Name	Physician
Tom Smith	8261
Amy Jones	8548
Brad White	3872
James Keller	6353
Enrique Lopez	8932
Mohammed Kumar	1860
Dulian George	4758
Itai West	6268
Duan Diego	9824

1-9 of 100

app.pendo.io/in-app-designer/latest/app/tagging/

Manage Pages And Features

Features | Pages

FEATURES OVERVIEW

- 14 Suggested Features
List of untagged elements on this page
- 7 Tagged Features
List of tagged features on this page

Heatmap



Search

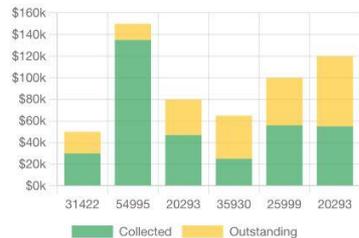


CREATE RECORD

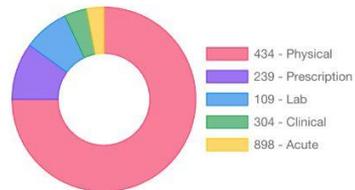
Patient Visits this Quarter



Billing Amount by Physician



Reason for Visit



Today's Patients

Name ↑ | Physician

Tom Smith 8261

Amy Jones 8548

Brad White 3872

James Keller 6353

Enrique Lopez 8932

Mohammed Kumar 1860

Julian George 4758

Itai West 6268

Juan Diego 9824

1-9 of 100



Tag Feature

Re-Select

Navigate:

 Create New Feature Merge with Existing

Feature Name *

Physicians Link

Assign to Product Area

No Product Area

0

Total Feature clicks
in the last

24 Hours

0 Unique Visitors

Feature Element Matching

 Suggested Match

Selection

[href="/physicians"]:contains('Physicians'):nth-child(4)

Rules using 'nth-child' tend to be unreliable due to their reliance on element order.
[Learn More](#) Rule Builder Custom CSS

Page Location

 Sitewide Only on this page

Tag Page

Exit

Cancel

Save

Guide Name

Name Your Guide *

EHR Walkthrough

App Information

Select an app

AcmeEHR

Guide Start URL

<https://ehr.pendoexperience.io>

🔒 (Super Only) Provide Lookaside Host ⓘ

Start from scratch

New Build with Pendo AI

Build with Pendo AI

**Disclaimer:** Responses generated by Pendo AI are not guaranteed to be accurate or complete. Please carefully review and validate the results before publishing guides.

Build a maximum

6

step guide in



AcmeEHR to

walk through a patient creation process in an EHR tool

using a

professional

tone

Auto Generate Guide

Suggested Steps (5)

#	Layout	Content
1	tooltip	Navigate to the Patient tab and click the New Patient button.
2	lightbox	Enter the patient's demographic information, including their name, address, phone number, and insurance information.
3	lightbox	Create a new medical record for the patient by clicking the Create New Record button.
4	lightbox	Enter the patient's medical history, including their current medications, allergies, and past medical conditions.

Cancel

Launch Adopt Studio

Disclaimer: Responses generated by Pendo AI are not guaranteed to be accurate or complete. Please carefully review and validate the results before publishing guides.

Build a maximum step guide in using a tone [Auto Generate Guide](#)

Suggested Steps (5)

#	Layout	Content
1	<input type="text" value="tooltip"/>	Navigate to the Patient tab and click the New Patient button.
2	<input type="text" value="lightbox"/>	Enter the patient's demographic information, including their name, address, phone number, and insurance information.
3	<input type="text" value="lightbox"/>	Create a new medical record for the patient by clicking the Create New Record button.
4	<input type="text" value="lightbox"/>	Enter the patient's medical history, including their current medications, allergies, and past medical conditions.
5	<input type="text" value="lightbox"/>	Save the patient's information by clicking the Save button.
6		Enter text to add another step

professional
direct
expert
friendly
conversational
casual

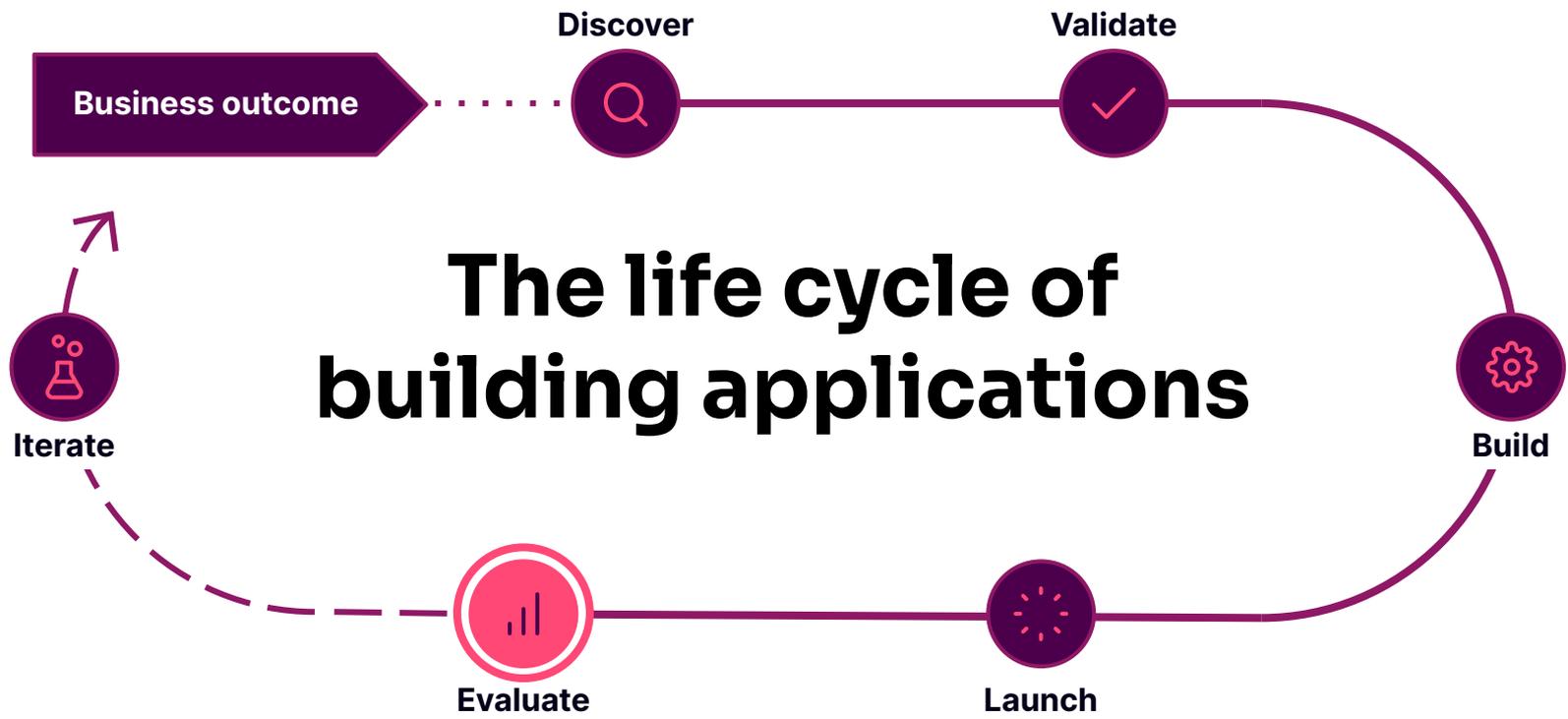
Navigate to the Patient tab and click the New Patient button. ✕

Step 1

Enter the patient's demographic information, including their name, address, phone number, and insurance information. ✕

Create a new medical record for the patient by clicking the Create New Record button. ✕

>



The life cycle of building applications

Compose

Inbox

6,691

Starred

Snoozed

Sent

Drafts

452

More

Labels

+



Your NPS insights

DEMO: AcmeCRM NPS

September 2023



Monthly results for September 1-30, 2023

NPS score

September	53
MoM	5
YoY	53

Responses

Total	226
Textual	224

Distribution

Promoters	76.11%
Passives	0.88%
Detractors	23.01%

[See this survey on Pendo](#)

Summary of responses

Based on the users- feedback from the NPS survey, it is clear that there is a mix of positive and negative sentiments about the CRM software.

- The lack of AI-powered features and poor machine learning capabilities in the CRM software made it difficult to compete in the market.
- The lack of campaign management tools and poor customer segmentation features affected the scalability of the software.
- Some users had concerns about the slow response times and lack of personalized



DEMO: AcmeCRM NPS

Add to Dashboard

Manage subscription

PUBLIC



Acme CRM | Acme Lightning Guides | No Guide Category

Last updated by addie.jackson@pendo.io on 10/6/2023 at 2:01 AM GMT

New AcmeEHR NPS

Overview | Responses | Views | Settings | AI activity log

Everyone

Last 90 Days

All Accounts

All Languages

In-app + Email

Set to Creation Date

Open Responses Tab

Create Segment



Analytics

Last updated by addie.jackson@pendo.io on May 10, 2023 4:15:45 PM GMT

Responses (20) | NPS Theme Distribution

Summary of responses BETA

Analytics

- The analytics dashboard in this CRM tool provides valuable insights on our sales team's performance.
- The analytics dashboard is helpful, but there is a desire for more options for customizing the reports and visualizations.
- The analytics dashboard in this CRM tool provides valuable insights on our sales team's performance.

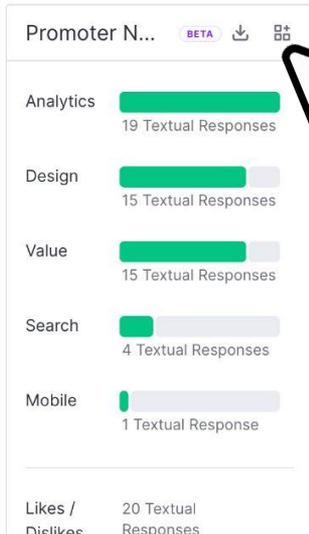
Recap: The analytics dashboard in the CRM tool is valuable for obtaining insights on the sales team's performance, although there is a need for more customization options.

Theme summarized from 20 responses:

- 0 responses manually assigned by users
- 20 responses automatically assigned by Pendo AI

Regenerate

Copy



NPS Monthly



Create Segment



Settings

Name

NPS Theme Response

Visibility

Everyone

Only Me

Select Visitor Data

- Identified Visitors Only
- Anonymous Visitors Only
- All Visitors

Eligible Visitors ⓘ

2500

Guide Eligible

No ⓘ

☰ Poll Response ▾

All Apps ▾

● Primary Active NPS Survey ▾

NPS Themes ▾

Easy ▾

Promoters ▾

within last ▾



60

days ▾

OR

+ AND

Cancel

Create Segment



[< Back to Guides](#)

Pam's AcmeEHR Guide - DND

[Watch replays](#)

[PUBLIC](#)

...

[AcmeEHR](#) | [Add New](#) | [Education](#)

Last updated by addie.jacks on 10/11/2023 at 11:45 PM GMT

Walkthrough of the Add New Patient process - targeted to those who have struggled with it in the past!

[Settings](#)

[Guide Metrics](#)

[Content](#) | [Troubleshoot](#)

Viewing: [English \(US\)](#)

[Preview](#)

[Manage in my app](#)

First, click the "Patients" tab in the main menu.

NEXT

Then, click the "New Patient" button.

NEXT

Next, enter the patient's name, date of birth, and gender.

NEXT



Everyone

Last 90 Days

Must Include (0)

Journeys for Completed Workflows (93)

Top Journeys

All Journeys

Sort by Frequency

< Previous | Next >

3 33477 Attempts (27%)

6 steps · 29s

➔ Add New Button

7s

1 Add New - Type SELECT

1s

2 Add New - Field One

6s

3 Add New - Field Two

7s

4 Add New - Field Three

6s

➔ Details Page - Any

4 452 Attempts (0.3%)

8 steps · 15s

➔ Add New Button

<1 s

1 Opportunities

2s

2 Add New - Type SELECT

1s

3 Add New - Field One

3s

4 Add New - Field Two

3s

5 Add New - Field Three

5 298 Attempts (0.2%)

7 steps · 1m 44s

➔ Add New Button

<1 s

1 Accounts

26s

2 Add New - Field One

29s

3 Add New - Field Two

13s

4 Add New - Field Three

35s

5 Added New Account

6 279 Attempts (0.2%)

7 steps · 37s

➔ Add New Button

<1 s

1 Opportunities

7s

2 Add New - Field One

15s

3 Add New - Field Two

7s

4 Add New - Field Three

6s

5 Added New Opportunity

7 253 Attempts (0.2%)

4 steps · 11s

➔ Add New Button

<1 s

1 Opportunities

11s

2 Added New Opportunity

<1 s

➔ Details Page - Any



Add New Patient Workflow

Select Pages & Features

Home Journeys

Everyone

Last 90 Days

Must Include (0)

Journeys for Completed Workflows (93)

Top Journeys

All Journeys

Insights: We found 2 insights about Top Journeys.

Show Me

MOST COMMON

49599 Attempts (41%)

6 steps · 20s

Add New Button

1s

1 Add New - Type SELECT

4s

2 Add New - Field One

3s

3 Add New - Field Two

1s

FEWEST STEPS

36 Attempts (<0.1%)

2 steps · 18s

Add New Button

18s

Details Page - Any

QUICKEST

3 Attempts (<0.1%)

3 steps · 2s

Add New Button

<1 s

1 Add New - Type SELECT

2s

Details Page - Any



Everyone

Last 90 Days

☆ Must Include (0)

Top Journeys

All Journeys

✦ Insights: We found 2 insights about Top Journeys.

Hide Insights

MOST COMMON

49599 Attempts (41%)

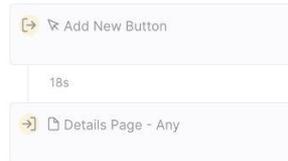
6 steps · 20s



FEWEST STEPS

36 Attempts (<0.1%)

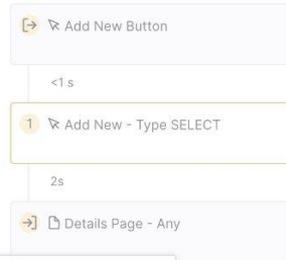
2 steps · 18s



QUICKEST

3 Attempts (<0.1%)

3 steps · 2s



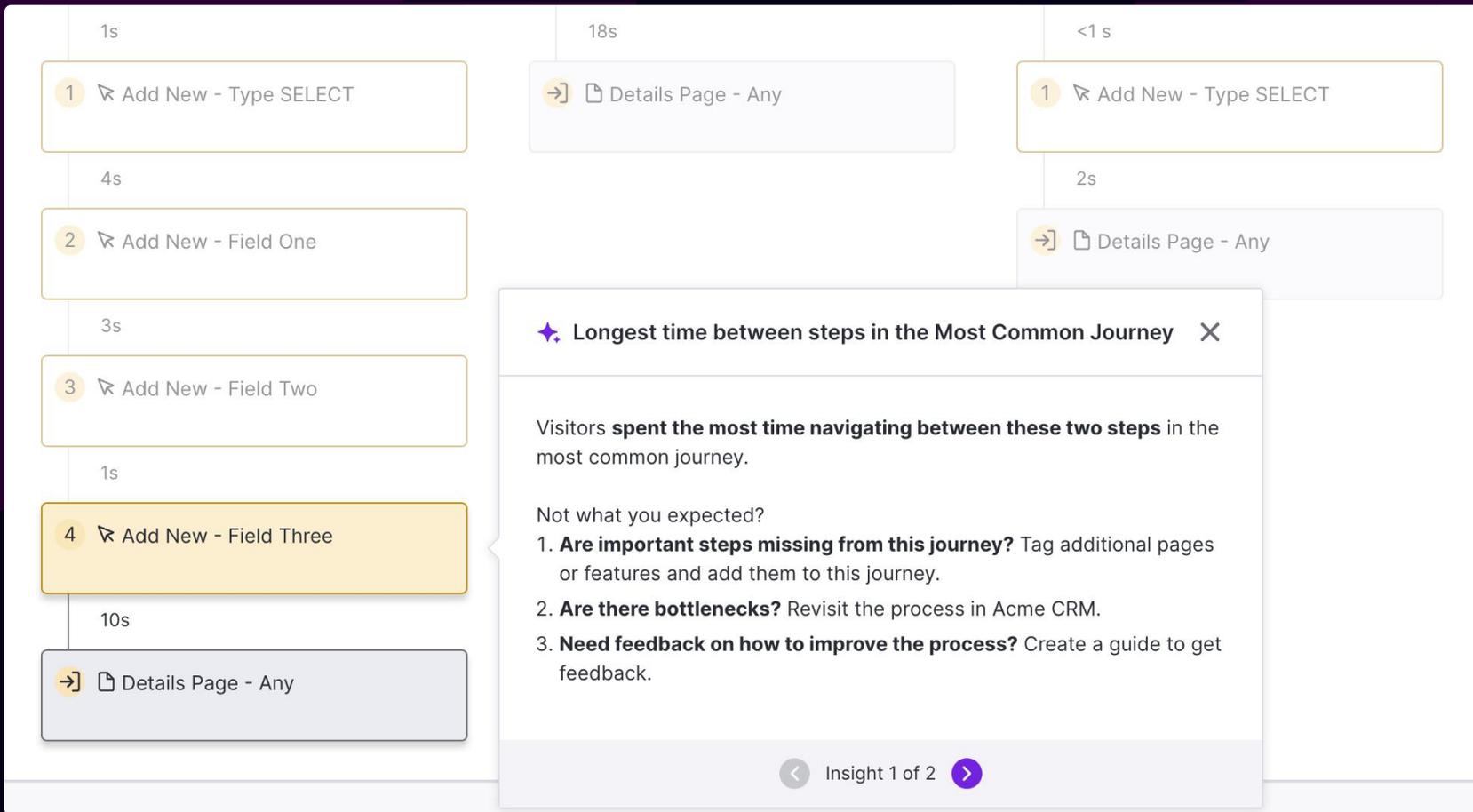
✦ Longest time between steps in the Most Common Journey ✕

Visitors **spent the most time navigating between these two steps** in the most common journey.

Not what you expected?

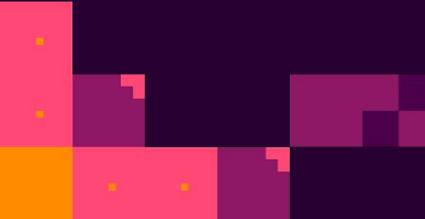
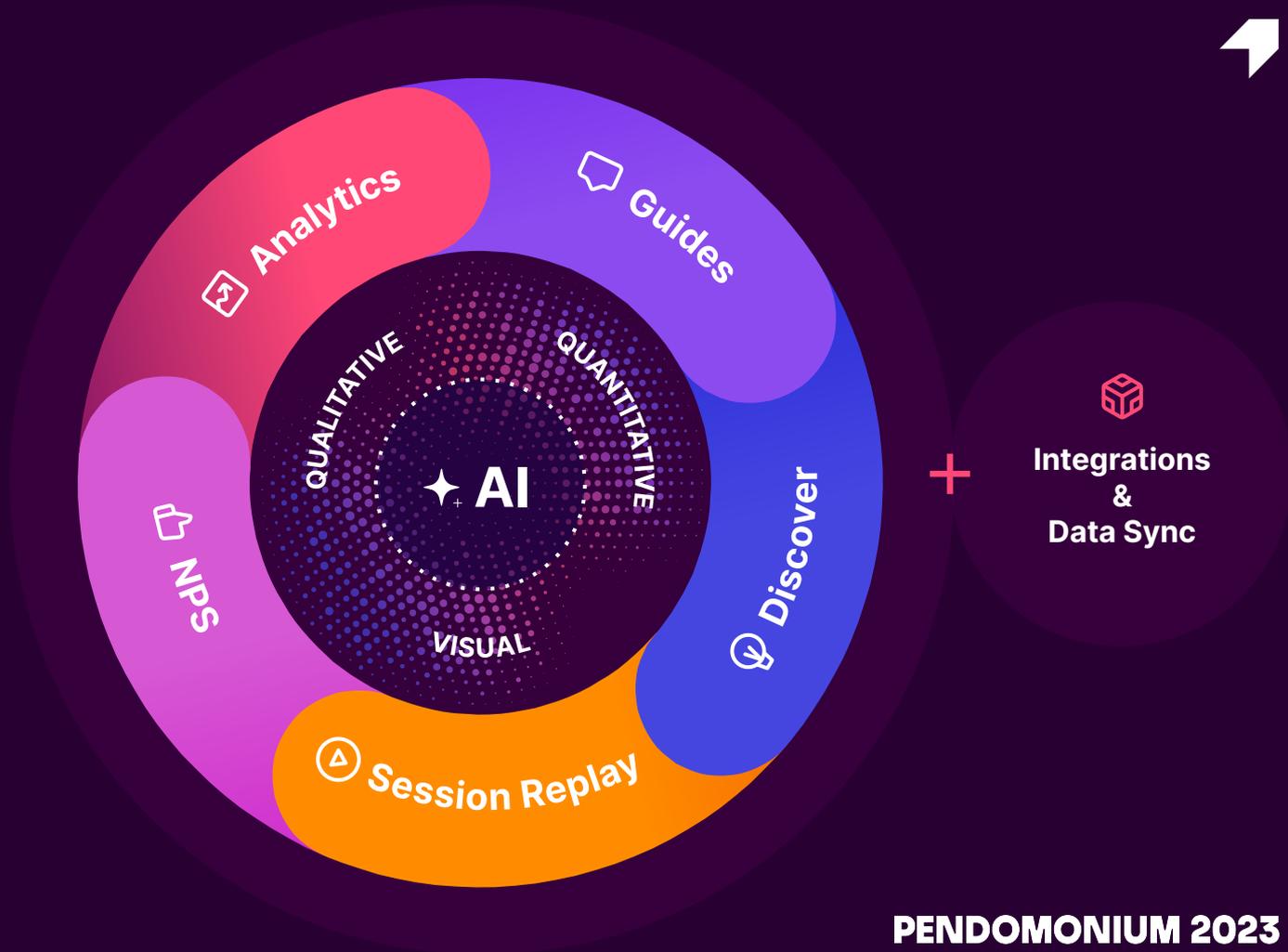
1. **Are important steps missing from this journey?** Tag additional pages or features and add them to this journey.
2. **Are there bottlenecks?** Revisit the process in Acme CRM.
3. **Need feedback on how to improve the process?** Create a guide to get feedback.

← Insight 1 of 2 →





pendo one
Application
Experience
Platform



PENDOMONIUM 2023

Innovations throughout the lifecycle



Innovations throughout the lifecycle



 Analytics



 Guides



 Replay



 Discover



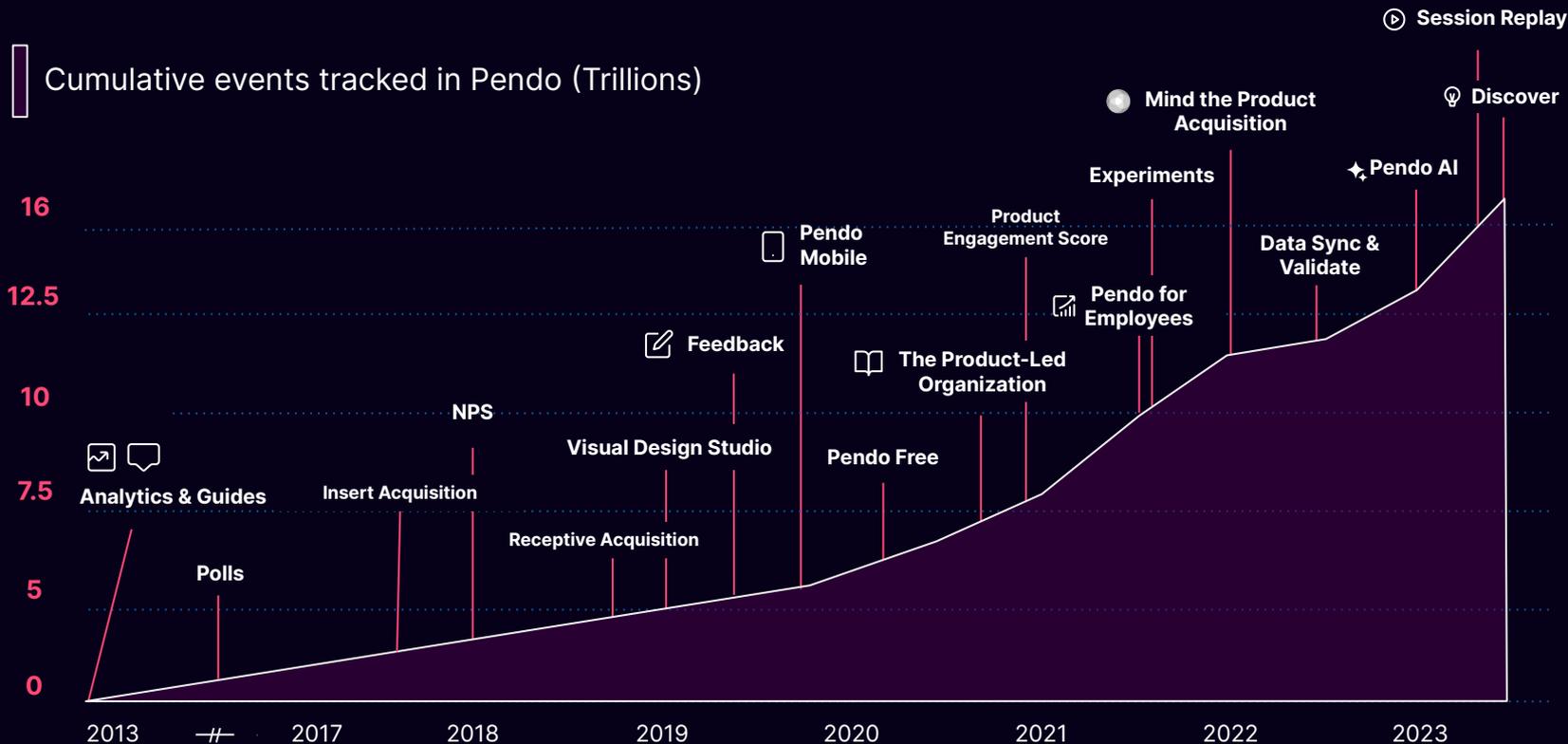
 Data Sync



 AI



A history of innovation and growth





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- So we used the Pendo data to make edits,



Thank you!

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