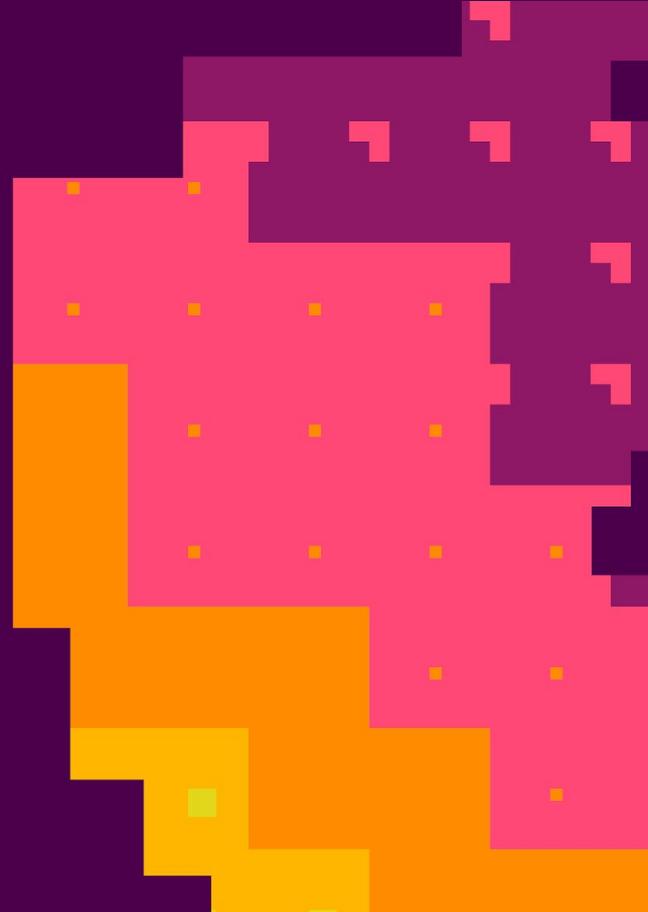


PENDOMONIUM 2023

Empowering Data-Informed Decisions Across the Enterprise





Andrew Chan

Director of Product
Management,
S&P Global



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Director of Client Services,
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About Us



- S&P Global Market Intelligence
- Digital Workflow Platform for Investor Relations Professionals
 - BD Corporate
 - Capital Access
- Using Pendo since 2019

Monthly Active Users

4K+

Global Accounts

3K+

Countries

60+

Agenda

- Challenges with Fragmented Data
- Journey to Operationalizing Data
- A Unified Data Solution
- Takeaways

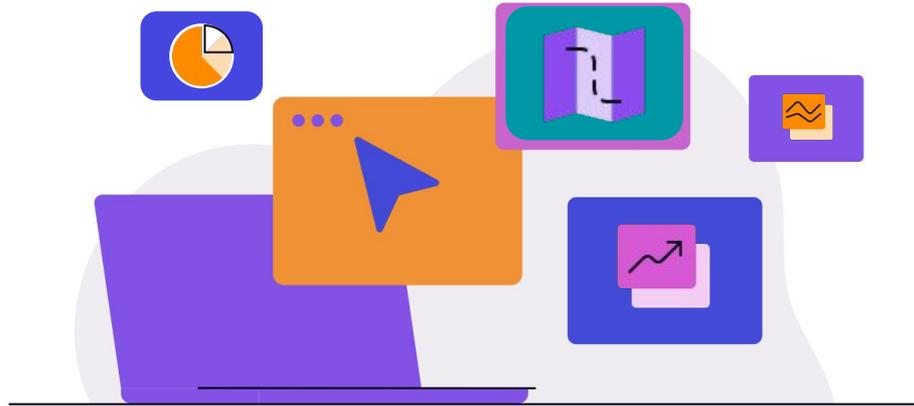


Challenges with Fragmented Data

Fragmented and siloed data creates issues



Customer data is fragmented and stored in several different systems, which makes it difficult to collaborate cross functionally and have a holistic view of our client.





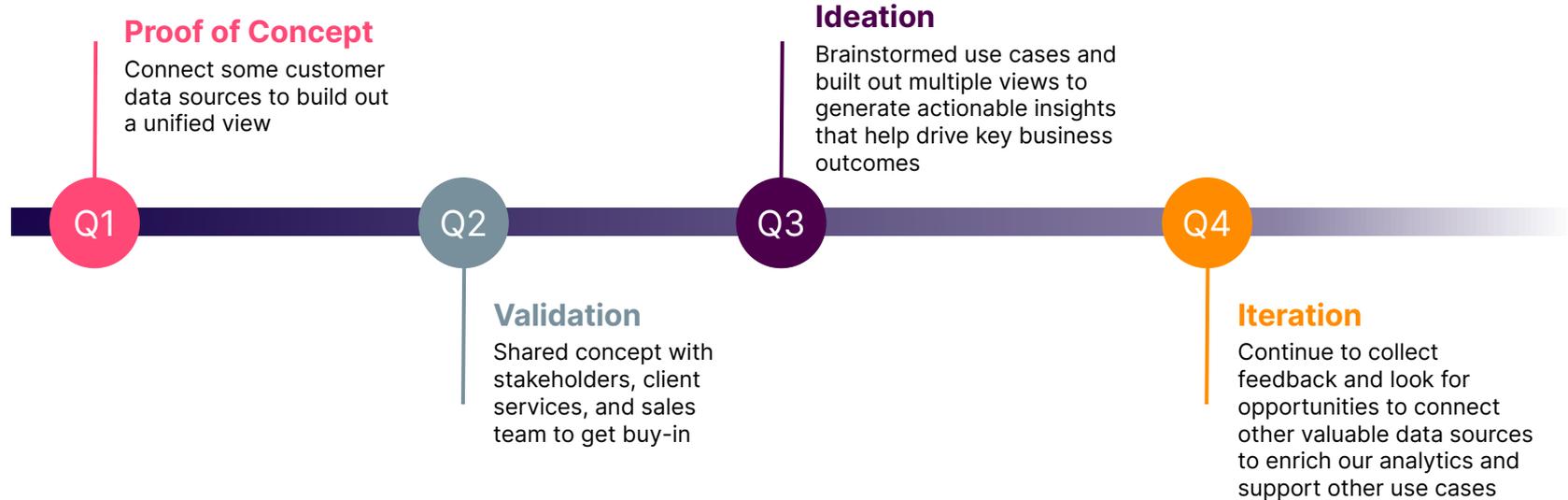
Journey to Operationalizing Data

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Where are we capturing client data?



What it took to get here



Teams to make it a success:

- Client Services, Sales, and Product
- Salesforce Data Automation
- Pendo TAM

Data Validation & Practices



- Tagging Accuracy
 - Review tagging rules
 - Refine rules as necessary
 - Verify accuracy of clicks

Features (1705)

<input type="checkbox"/>	<input type="checkbox"/>	☆ Name ▾	App ▾	Product Area ▾	Number of Clicks ▾	% of Feature... ▾
<input type="checkbox"/>	<input type="checkbox"/>	☆ Excel Download - Combined	BD Corp...	Excel Downlo... ▾	53552	1.7%
<input type="checkbox"/>	<input type="checkbox"/>	☆ BD Nav - BD Mail - button	BD Corp...	BD Mail ▾	6466	0.2%
<input type="checkbox"/>	<input type="checkbox"/>	☆ Add Activity - All Save Options	BD Corp...	Activities ▾	93711	3%
<input type="checkbox"/>	<input type="checkbox"/>	☆ Analytics > Map View Button	BD Corp...	Ownership - A... ▾	287	0%
<input type="checkbox"/>	<input type="checkbox"/>	☆ Advanced Search → Search button ...	BD Corp...	Advanced Se... ▾	3922	0.1%

Data Validation & Practices



The screenshot displays a web application interface with a sidebar on the left and a main content area. The sidebar contains navigation icons for Engage, Dashboards, Product, People, Behavior, Guides, Roadmaps, and Validate. The main content area shows a 'Details' view for a specific feature. At the top, there are filters for 'Corporate Client Contain...', 'Today', and 'All Accounts'. Below the filters, the 'Details' section includes fields for Name, Product Area, App, and Page Info. The 'Name' field is 'Excel Download - Combined', 'Product Area' is 'Excel Download', 'App' is 'BD Corporate', and 'Page Info' is 'ALL PAGES'. Below these fields, there is a list of seven rules, each with a 'Remove Rule' button. The rules are: '#cti00_mb_r_SRPnl_ucExportPanel_bex', '#cti00_mb_r_SRPnl_ucExportPanel_bex', '.fa-file-excel-o', '#cti00_mb_r_SRPnl_ucExportPanel_bex', '#cti00_mb_r_SRPnl_ucExportPanel_bex', '#cti00_mb_r_SRPnl_ucExportPanel_bex', and 'span > .c-btn-caret'.

- Combining Tagged Features using Rules
- Flagging Core Events for PES
- Comparing PES to Internal Health Score



A Unified Data Solution

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Customer Insights Dashboard

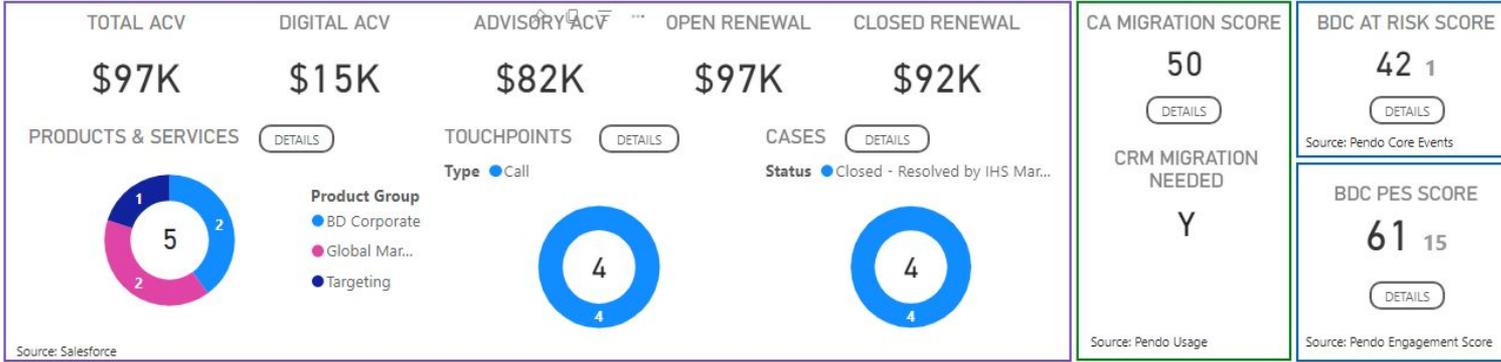


Company_3288

13 years 11 mont... 1/1/2024
Digital Tenure (Years) Digital Expiration Date

Netanya Asfour
CS Advisor

Matt Mckay
Sales Rep



USER

Search

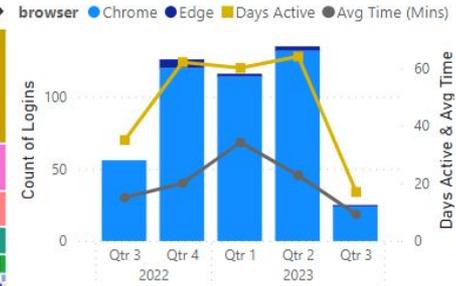
- Visitor_162672
- Visitor_164877
- Visitor_175195
- Visitor_199718
- Visitor_201408
- Visitor_201467

User	Last Login	Days Active
Visitor_201408	7/12/2023	171
Visitor_199718	8/14/2023	154
Visitor_175195	8/1/2023	59
Visitor_205194	7/19/2023	38
Visitor_210021	7/24/2023	10

BDC USAGE | PAGES



BDC | LOGIN TRENDS



CA USAGE | PAGES

Customer Insights Dashboard



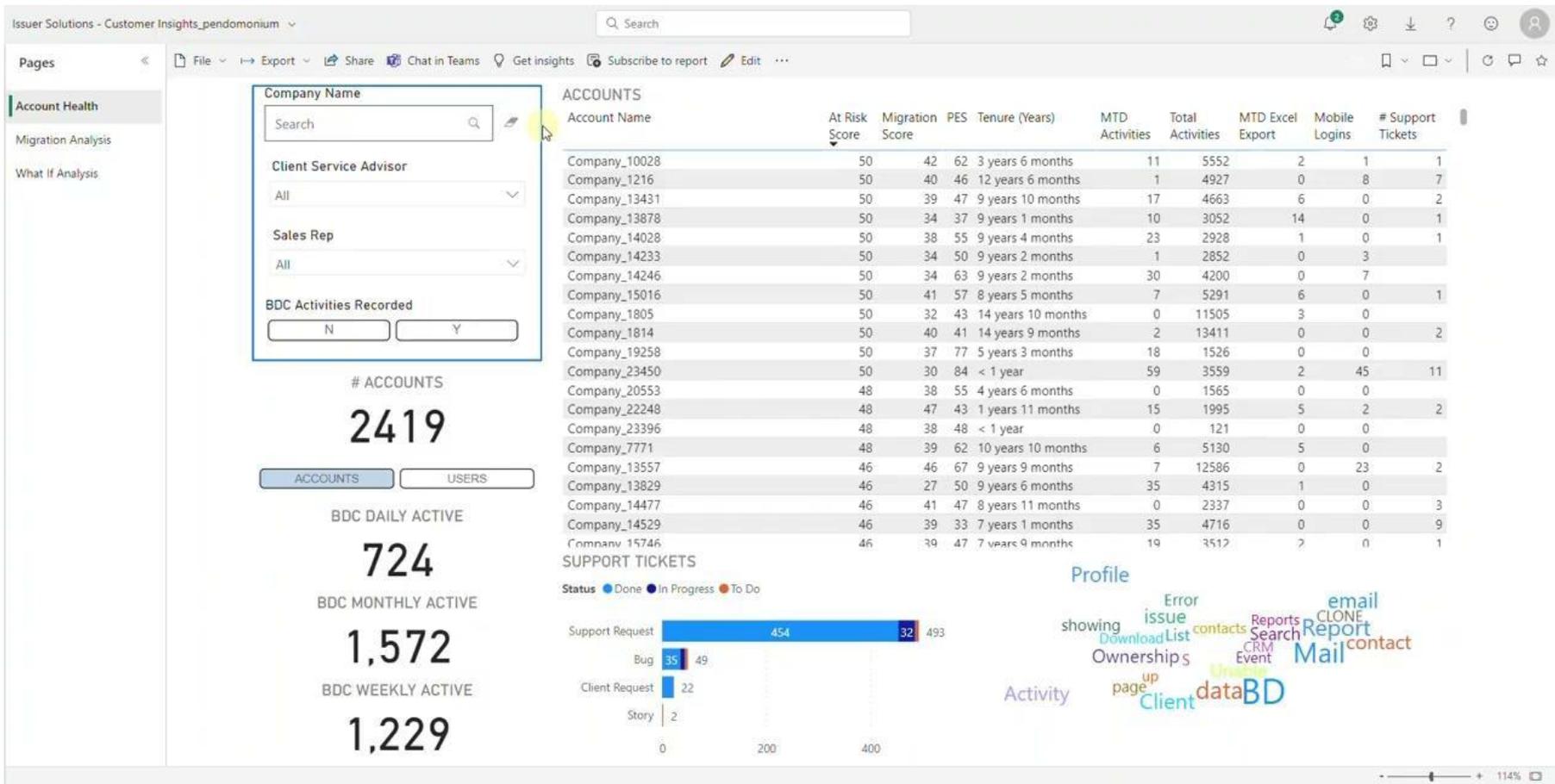
MIGRATION ANALYSIS

Company Name	Migration Score	BDC At Risk Score	CRM Migration Needed?	Digital Client Since	GMI	Prem Targ	Mobile Logins	# Data Alerts	Contract Expiration	Digital Tenure (Years)	Macro Industry	Market Cap	Float Shares	% Inst. Held	CS Advisor
Company_16073	97	22	N	2/3/2016	Y	N	0	0	12/28/2023	7 years 6 mo...	Industrials	Mid	57,065,142	92.41	Elizabeth Goo
Company_23758	97		N	6/29/2023	Y	N	0	0	6/30/2025	< 1 year	Industrials	Mid	39,164,064	95.55	Marianne Baik
Company_19945	96		N	5/7/2018	Y	N	0	0	7/1/2024	5 years 3 mo...	Energy and Utilities	Large	114,968,685	88.62	Baxter Knight
Company_21288	96	10	N	1/15/2020	Y	N	0	6	11/4/2025	3 years 7 mo...	Financials	Mid	111,582,144	76.56	Baxter Knight
Company_22206	96		N	3/16/2021	Y	N	0	0	2/18/2024	2 years 5 mo...	Healthcare	Mid	137,320,255	40.10	Marianne Baik
Company_21295	95	0	N	3/30/2022	Y	N	0	4	12/16/2025	1 years 4 mo...					Taylor Labour
Company_21367	95	3	N	7/28/2020	N	N	0	3	1/31/2024	3 years 0 mo...	Healthcare	Mid	57,802,632	73.91	Marianne Baik
Company_22487	95	3	N	6/29/2021	Y	N	0	1	11/3/2023	2 years 1 mo...	Technology, Media ...	Micro	41,627,137	48.96	Julie Hellen
Company_7355	95	3	N	6/11/2012	N	N	0	0	9/18/2023	11 years 2 mo...	Consumer	Mid	25,348,096	62.29	Baxter Knight
Company_13512	93	2	N	2/11/2015	N	N	0	6	9/30/2023	8 years 6 mo...	Technology, Media ...	Mid	50,528,484	54.34	Lillian Zhang

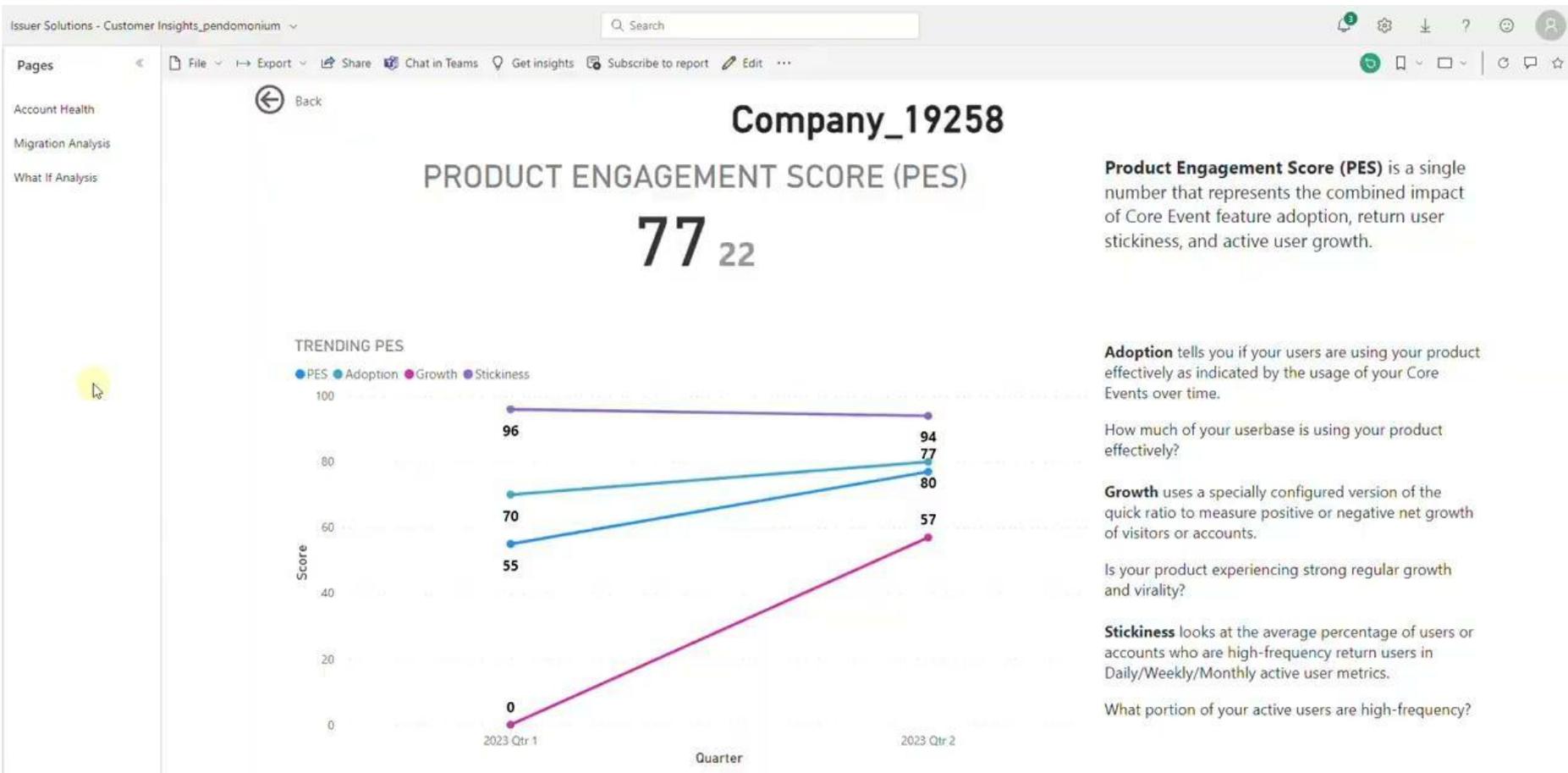
MIGRATION SCORE DETAILS

Company Name	Migration Score	# ADF	# CDF	Workflow # BDMail Sent	Advanced Search	Advanced Search - Equity Ownership Attributes	Advanced Search - Fix Income Ownership	Advanced Search - Investor Research	Advanced Search - List Usage	Advanced Search - Peer Security Ownership	Advanced S Premium Ta
Company_1005	89	0	0	0	No Usage	No Usage	No Usage	No Usage	No Usage	No Usage	No Usage
Company_11148	33	1	0	591	Medium	Low	No Usage	Medium	Medium	Very Low	No Usage
Company_11200	73	1	0	0	No Usage	No Usage	No Usage	No Usage	No Usage	No Usage	No Usage
Company_1281	80	0	0	0	No Usage	No Usage	No Usage	No Usage	No Usage	No Usage	No Usage
Company_13380	77	1	0	0	High	No Usage	No Usage	High	No Usage	No Usage	No Usage
Company_13502	74	3	2	1	Very Low	Low	No Usage	Very Low	No Usage	Low	No Usage
Company_13512	93	1	3	25	No Usage	No Usage	No Usage	No Usage	No Usage	No Usage	No Usage
Company_1364	41	1	0	0	Low	Medium	No Usage	Medium	Very Low	Medium	No Usage
Company_13695	93	2	0	0	No Usage	No Usage	No Usage	No Usage	No Usage	No Usage	No Usage

Demo - Customer Insights Dashboard



Demo – Migration Analysis





Takeaways



Impact, Results, Opportunities

Total Views*

2.7K+

Total Viewers*

80+

- ✔ Streamlined at-risk review process
- ✔ Resource for pre-client engagement preparation
- ✔ Facilitated migration planning discussions
- Push guides to users to introduce new or underutilized features
- Provide clients more self-help resources within Resource Center

*Past 90 days across product, sales, and customer success teams

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Takeaways Client Services



- **Quarterly Account Review**

Reduce total account review process by four business days

- **Reduce KPIs**

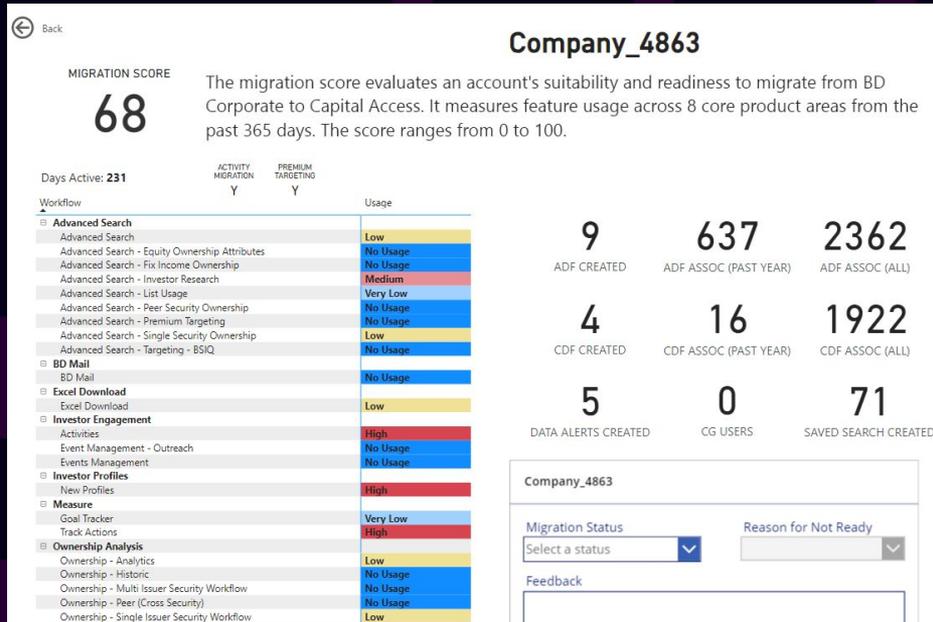
Data insights allow for less frequent client touchpoints

- **Increase Collaboration**

Combining insights from various teams allows for full transparency and collaboration between different coverage teams

Takeaways Migration

- Develop a transparent migration strategy for three thousand accounts over a 12–18-month period
- Align current usage with feature parity roadmap



Takeaways ProdOps



- **Partnership**

Unified view for Product team to collaborate cross-functionally with CS & Sales to monitor customer health, business growth, and product engagement

- **Prioritization**

Informed our product strategy and decisions on high value areas to continue to invest in and low value areas to sunset

How to get started



- Identify the problem and the available resources
- Designate your champions to drive adoption and iteration
- Start small and gather feedback
- Share your success



Thank you!

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PENDO MONIUM 2023