

**PENDOMONIUM 2023**

**How to take  
discovery from an  
art to a science  
with Pendo**





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# Agenda

- Why product discovery is evolving
- How Pendo enables discovery best practices
- Pendo Discover in action
- Q&A



# Why product discovery is evolving

# Today, product teams must drive the business

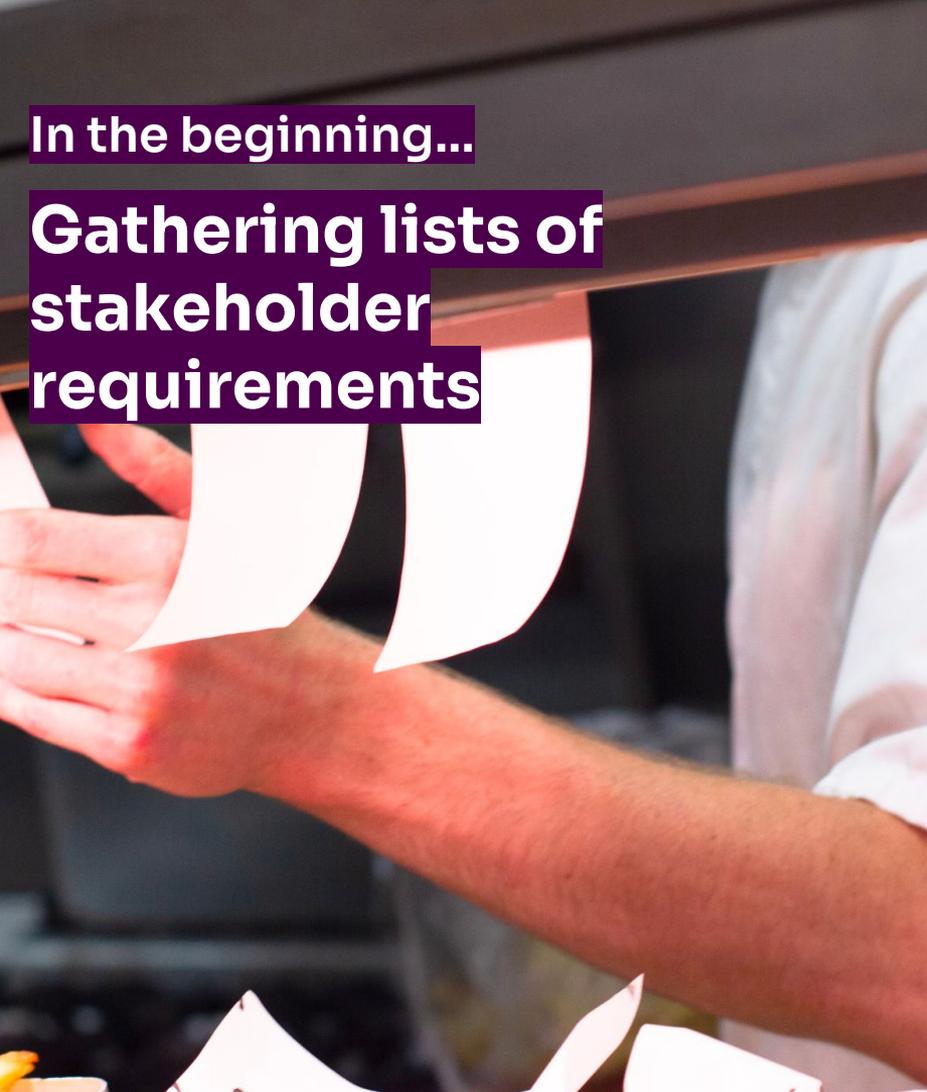
## Outputs

Build, deploy, celebrate



## Outcomes

Solve business problems  
Keep going



In the beginning...

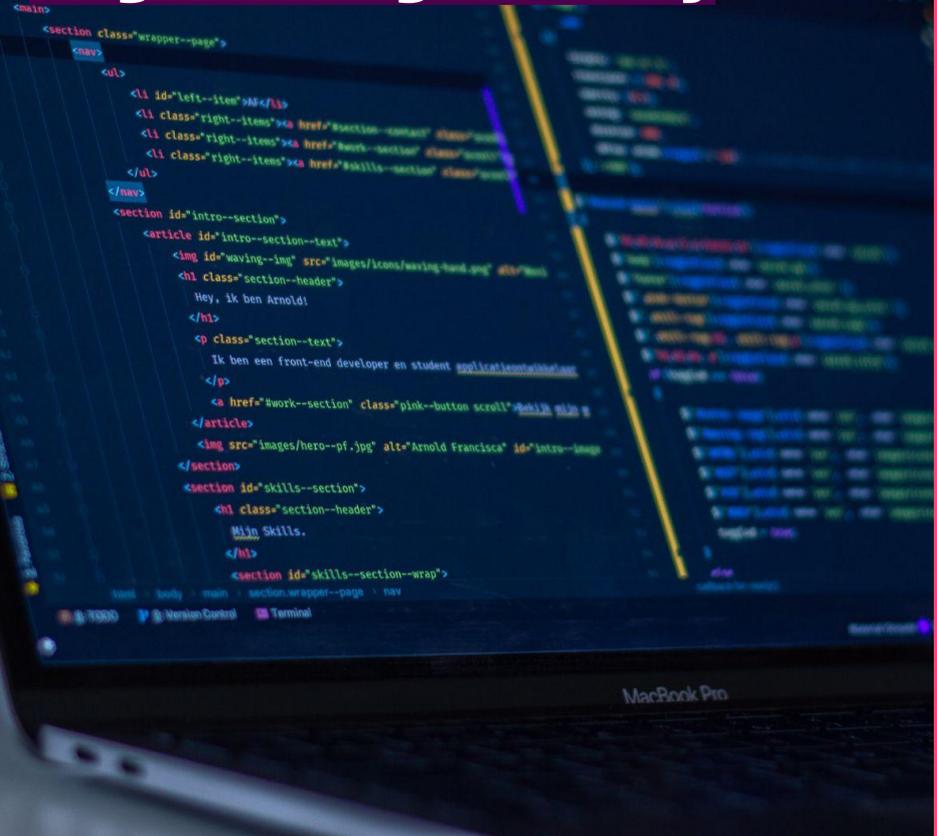
**Gathering lists of  
stakeholder  
requirements**



Today...

**Continuously  
discovering needs  
directly from customers**

# AI is increasing engineering velocity



There's more data points than ever before



**Sometimes we're forced to roll the dice**



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**“The goal of product discovery  
is to learn fast”**

Teresa Torres

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# How Pendo enables discovery best practices



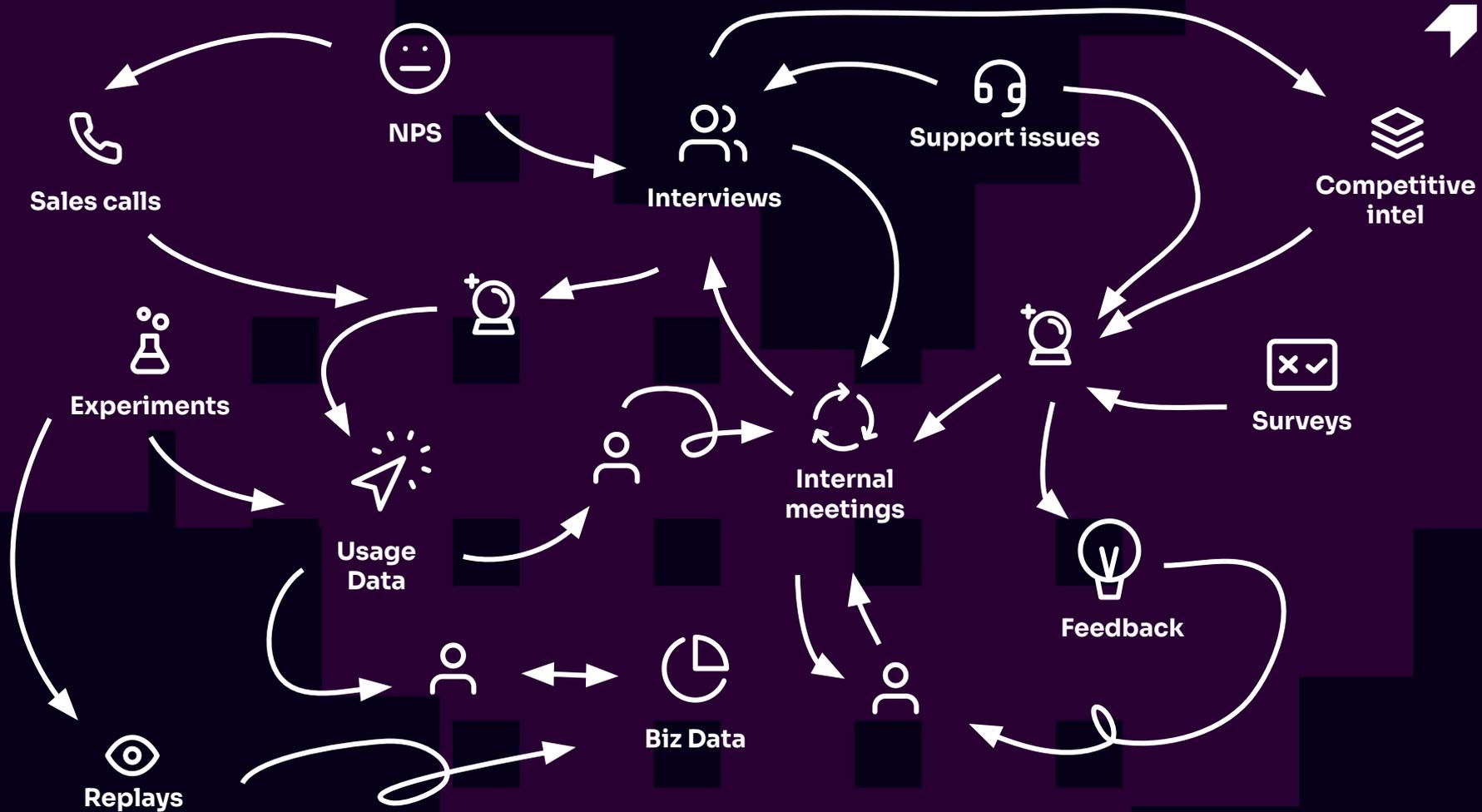
**When we listen to everyone**

**We can't prioritize for impact**

# Discovery works when you understand your target audience

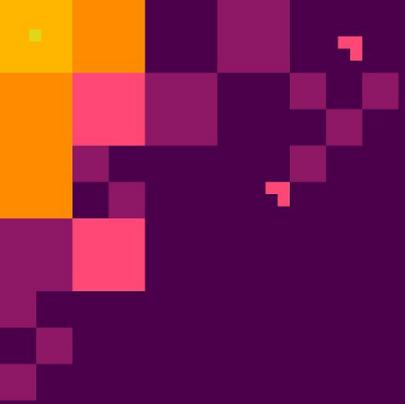
- What they need
- What they expect
- What they do
- Why they do it





**“the best camera is the one  
that’s with you”**





# Pendo Discover

Prioritize with Confidence

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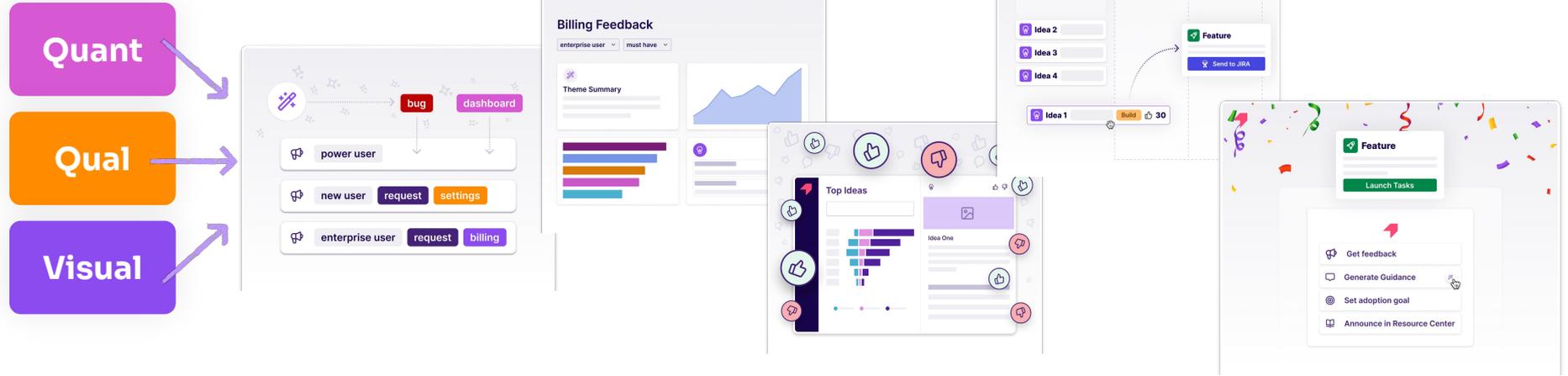


Discover, powered by the Pendo platform, is the **only solution** that enables **truly data-informed** product discovery

Synthesizing quant, qual, and visual data:

- To **generate hypotheses**
- Validate with the **right audience**
- Communicate **at scale**

# Discovery with Pendo Discover



## 1. Centralize

All your Pendo data in one place

## 2. Prioritize

Get confidence in your roadmap

## 3. Communicate

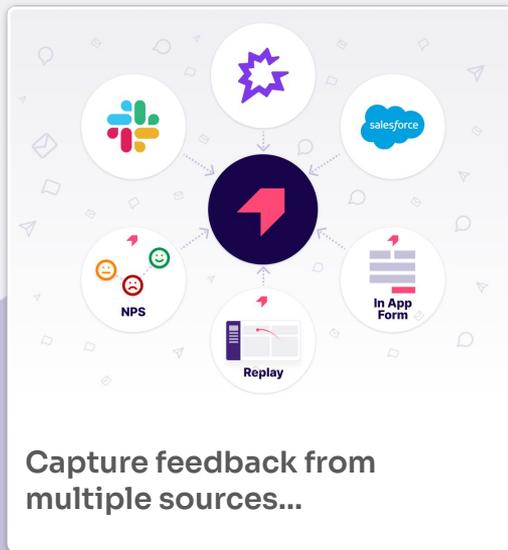
Constantly share evidence & plans

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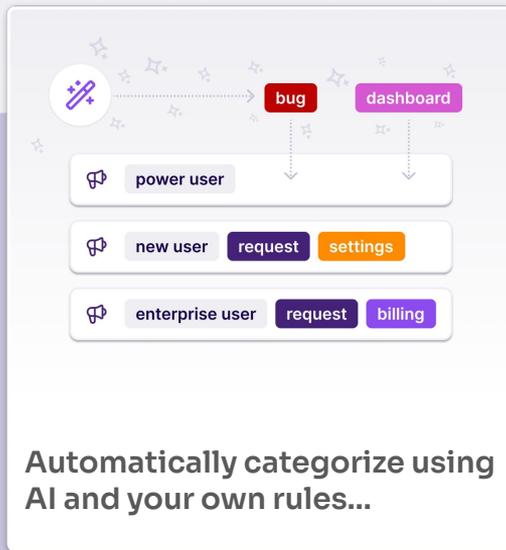


# 1. Centralize

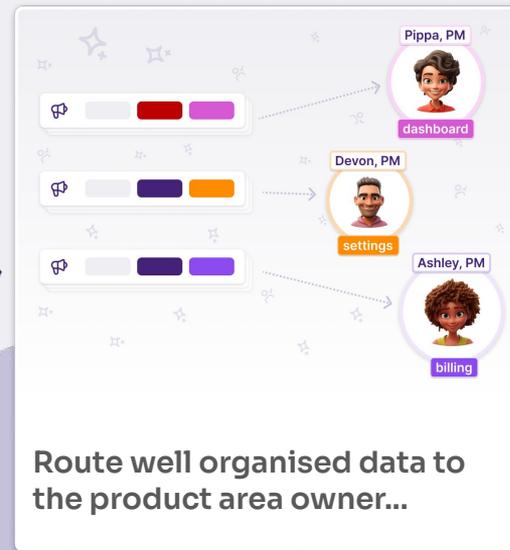
## Capture



## Categorize



## Route





# 2. Prioritize

## Insights

**Billing Feedback**

enterprise user | must have

Theme Summary

PMs drill into ready made insights from key personas...

## Ideate

Effortlessly gather Feedback as evidence for product ideas...

## Validate

Top Ideas

Idea One

Validate ideas further in app with target customers...



# 3. Communicate

## Promote

**Top Ideas**

- Idea 2
- Idea 3
- Idea 4
- Idea 1 **Build** 30

**Feature**

Send to JIRA

Promote ideas to features and handoff to engineers...

## Engage

**Customer App**

Research Invite

Create guide

Engage customers in the build process...

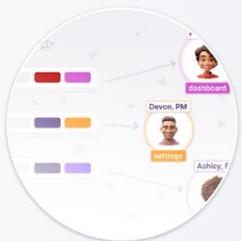
## Launch

**Feature**

Launch Tasks

- Get feedback
- Generate Guidance
- Set adoption goal
- Announce in Resource Center

Check off your feature launch task list in Pendo...



## Centralize

### Automated descriptions

Accelerate quality feedback submissions.

### Suggested product areas

Triage to the right product managers.

Pendo AI



## Prioritize

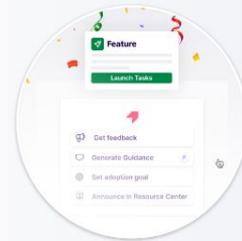
### Feedback summary

Analyze large volumes of customer feedback.

### Generated product ideas

Extract potential product ideas.

Pendo AI



## Communicate

### Notification rules

Leverage intelligent rules engine.

### Automated guide content

Generate content for feature releases.

Pendo AI





# Pendo Discover in action

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# Actively building Replay with Pendo



**Replay Library**

Everyone Today

Include Events... Any Product Area

Replays (126)

- Visitor ID Engagement Level
- ☆ jane@acme.com
- ★ victor@acme.com
- ☆ nancy@acme.com
- ★ david@acme.com
- ☆ jeffrey@acme.com
- ☆ debra@acme.com
- ☆ carolyn@acme.com
- ☆ tomer@acme.com
- ★ julie@acme.com

**Replay 2 of 6** | Back to library | Event Filters - Acme Page 2, Acme Page 3 + 4 More | Share

### Good Afternoon, Victor!

Accounts Investments Transfers

**CONTACT INFORMATION**

First Name: [Redacted] Last Name: [Redacted]

Phone: [Redacted] Email: [Redacted]

**BILLING INFORMATION**

Street: [Redacted]

City: [Redacted] State: [Redacted] Zip Code: [Redacted]

**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	\$545,375.97
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 Feature Name
- 00:06 Viewed Untagged Page
- 00:07 Clicked Feature Name
- 00:10 Viewed Page Name
- 00:14 Clicked Feature Name

08:00 / 32:00 | Skip Inactivity

# We are all inundated with feedback

I've been using this session replay tool for a few weeks now, and it has transformed the way I analyze user behavior on our website. The ability to watch real-time sessions has provided invaluable insights into user interactions, helping us identify pain points and improve user experience.

Our design team loves this session replay tool because it allows us to observe how users navigate our app in real time. It's been instrumental in making data-driven design decisions. The ability to segment sessions based on user demographics has provided deeper insights into our diverse user base. Highly recommended!

The annotation feature is especially useful for team collaboration, as we can easily highlight important moments in user sessions and discuss them. It's a powerful tool that has had a positive impact on our workflow.

Replay is great! There are more features that I definitely need, but as a product this is super sound!

While this session replay tool offers some valuable insights into user behavior, its occasional glitches are frustrating. The tool's interface is clean and easy to navigate, but we've encountered playback errors that disrupt our analysis. When it works smoothly, it's a powerful asset, but reliability is an issue that needs attention.

# Not all solutions are scalable



Feedback ☆ 📁 🌐

File Edit View Insert Format Data Tools Extensions Help

🔍 ↶ ↷ 🖨️ 📄 100% | \$ % .0 .00 123 Sora | - 10 + | B I ⚡ A 🗑️ 🏠 📄 ⋮

A1 | 🗑️ Item

	A	B	C	D	E
1	Item	Who?	Description	Status	Other Notes
2	Visitor Search Results			Refined	<a href="https://pendo-io.atlass">https://pendo-io.atlass</a>
3	Next Session Queue			In Dev	
4	Skeleton Loading State		THIS IS PART OF NEXT SESSION QUEUE	In Dev	Jira Ticket
5	Red cursor		Remove the red cursor following a session or update styling or style the redcursor/add it as an option to remove (setting would persist per user); pressed as an interaction	Needs Refined	
6	Option to auto-start a session			Needs Refined	
7	Manage Columns		Ability to manage and add columns	Needs Refined	Jira Ticket
8	Show library filters on player			Needs Design	Jira Ticket
9	Filtered on a date range outside of last 14 days		If filtered on a custom date range (from a previous session) where sessions are no longer available, the user should not be able to view/click on the session	Needs Refined	Jira Ticket
10	Clicking session play/pauses		Based on industry patterns, this behavior is common amongst video players. We'd like to adopt this behavior with our player as well to match to match these interactions and provide our users with an easy to use	Needs Refined	<a href="https://pendo-io.atlass">https://pendo-io.atlass</a>
11	Player resizing			Needs Refined	Jira Ticket
12	When tabbing through our controls, users tab through elements in replays		If I am a user utilizing computer controls to navigate through replays, as I advance down the page, instead of jumping straight from the header to the controls I parse through all of the elements within the player	Needs Refined	<a href="https://pendo-io.atlass">https://pendo-io.atlass</a>
13	Show guide step on hover		If I am hovering over a guide annotation on the timeline, I can see which steps were seen	Needs Refined	Jira Ticket
14	Update expired empty state		Update to mini illustration	Needs Design	
15	Link to visitor details and		The ability to view visitor details directly from watching a session + Clearly	Refined	

# Add Feedback as evidence to Ideas



**Feedback** + ↻ 🗑

### Customizable columns

Feedback from [redacted] at [redacted] created by rebecca.notte@pendo.io on Jul 28, 2023

Reviewed ▾

#### Description

Customizable columns. If we could be able to choose what data we saw from the Library view it'd be easier to know who we are looking at.

[Attach Image](#) [Add Link](#)

#### Labels

Reply: Library Enterprise ▾

#### Importance

Nice to Have ▾

#### App

Pendo Engage (Insights & Guidance) ▾

#### Product Area

Replay ▾



**Idea** 👍 + ↻ 🗑

[Add Cover](#)

### Add visitor/account metadata on library table

Idea created by david.flowers@pendo.io on Aug 1, 2023

Overview **Votes** 9

Apply Page Filters ⓘ ✓

<b>9</b> Votes	<b>7</b> Accounts	<b>518481</b> ARR
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**Nice To Have**

**more details about the user and their account**

I'd like to be able to see more details about the user and their account on this page. For example, account ID and user usage stats (are they a frequent user, what is their metadata values)

**Feedback item** added by rebecca.notte@pendo.io 10 days ago

**Nice To Have**

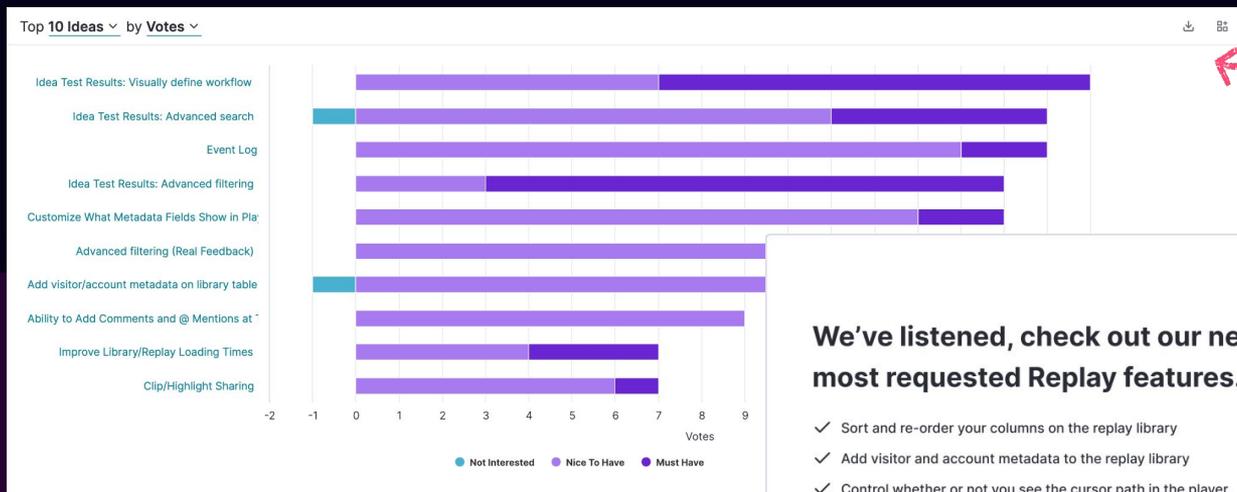
**Add a custom field column**

i would like to add a column. For example, I don't know clients by their ID. So, if I could add the account name (company name) column from my custom fields that would be great

**Feedback item** added by rebecca.notte@pendo.io

# Ideas into actions

Prioritizing the top ideas in Validate



We've listened, check out our newest, most requested Replay features.

- ✓ Sort and re-order your columns on the replay library
- ✓ Add visitor and account metadata to the replay library
- ✓ Control whether or not you see the cursor path in the player
- ✓ Automatically start replays when they are opened
- ✓ See page, feature, and guide counts on the replay library
- ✓ Watch Replays from page, feature, guide, poll, and nps detail pages

Cursor settings  
Show path

Player settings  
Auto-start

Manage Columns  
Add, reorder or remove columns to customize your table.

Replays 1/10	Session	Duration	Guide Count	Page Count	Feature Count
	visitor@acme.com	13m	5	11	26
	visitor@acme.com	13m	2	16	41
	visitor@acme.com	6m	7	21	37
	visitor@acme.com	27m	4	5	10
	visitor@acme.com	42m	10	12	20
	visitor@acme.com	56m	6	26	103
	visitor@acme.com	38m	3	55	112
	visitor@acme.com	33m	15	42	64

Go to library >

Closing the loop



# Communicated with ease



The screenshot displays a software interface with two main panels. The left panel is titled "Now, Next, Later" and shows a roadmap for "Improve adoption". It has two columns: "Now (1)" and "Next (0)". Under "Now (1)", there is a task card for "Enhance Replay logging" with a sub-task "Event log". The right panel is titled "Event log" and provides details for the selected event, including its creation date and swimlane.

[Back to Roadmaps](#)

## Now, Next, Later

Add Description... Last updated by you on Oct 5, 2023 3:54:50 PM EDT

Now (1) Next (0)

**Improve adoption**

**Enhance Replay logging** 1

**Event log**

**Event log**

Last updated by you on Oct 5, 2023 3:54:27 PM EDT

**Overview** Linked 1

**In Discovery**

**Details**

Created by: niamh.jones@pendo.io

Created on: Oct 5, 2023

Swimlane: **Improve adoption**

**Description**

List of all pages, features, and guide events that occur during a replay. This list of events will appear on the side, while watching a replay.

# We learned faster, Gained confidence, Delivered value

**251**

Poll Responses Tallied

**303**

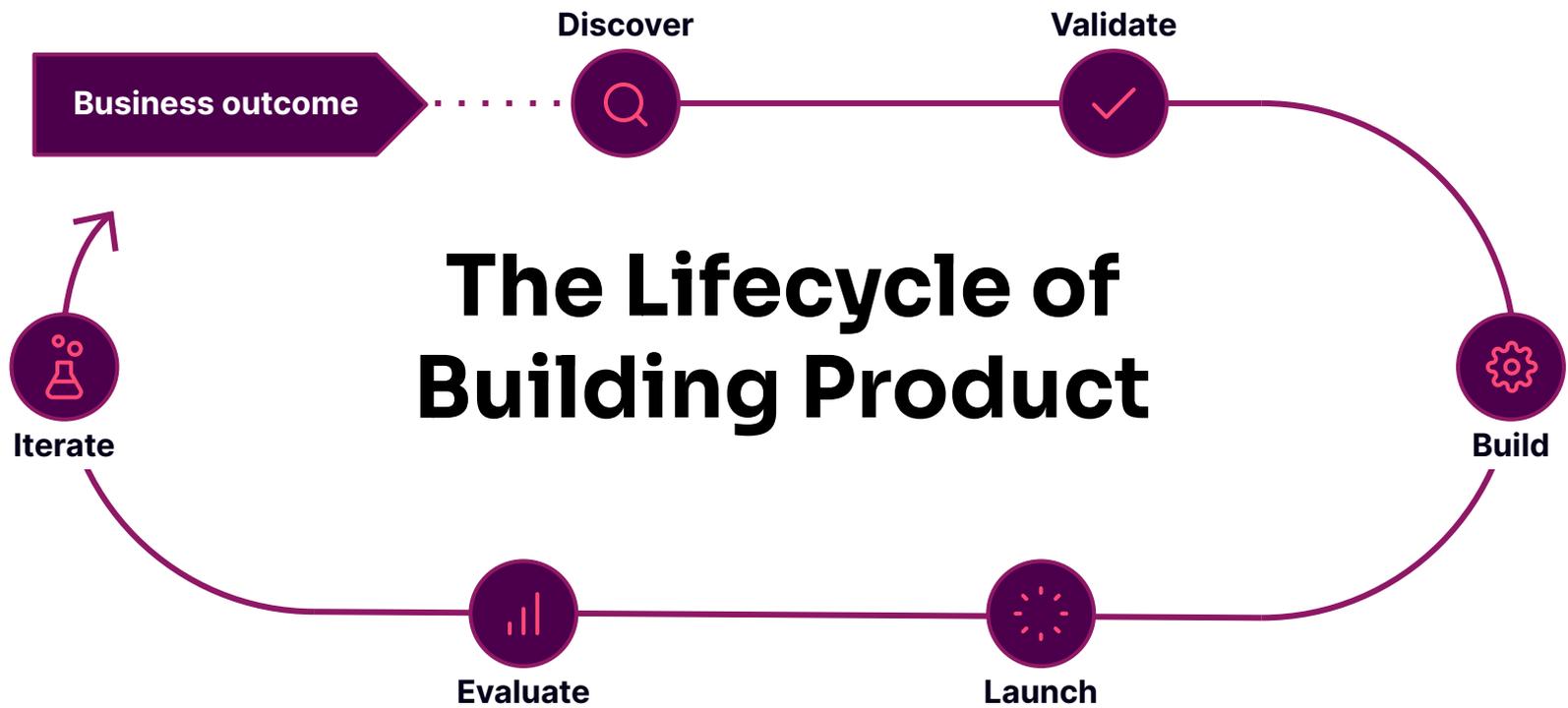
Accounts Engaged

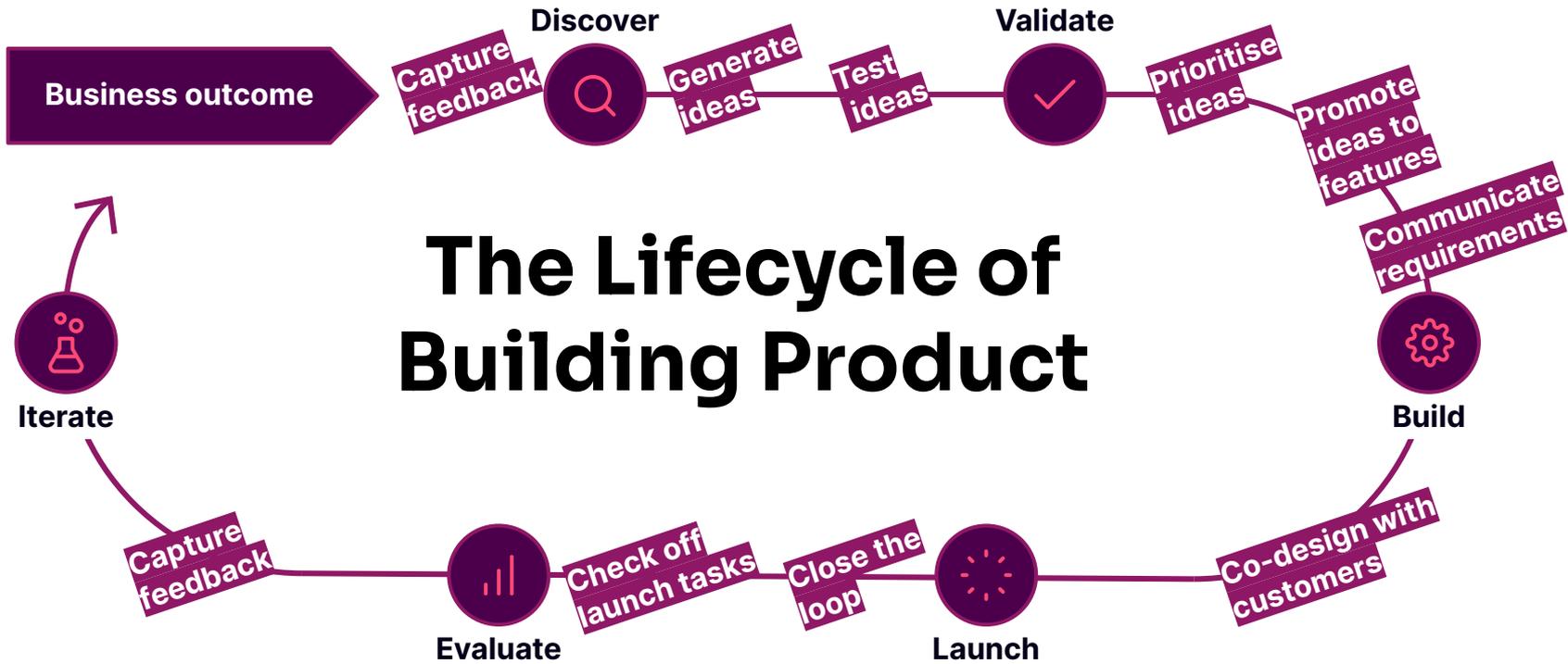
**506**

Votes Collected

**5d 4h**

Estimated Time Saved





# Come and see us in the Pendo Product Village

We'd love to hear all your product  
discovery challenges

## And join the waitlist



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**Thank you!**

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# PENDO MONIUM 2023