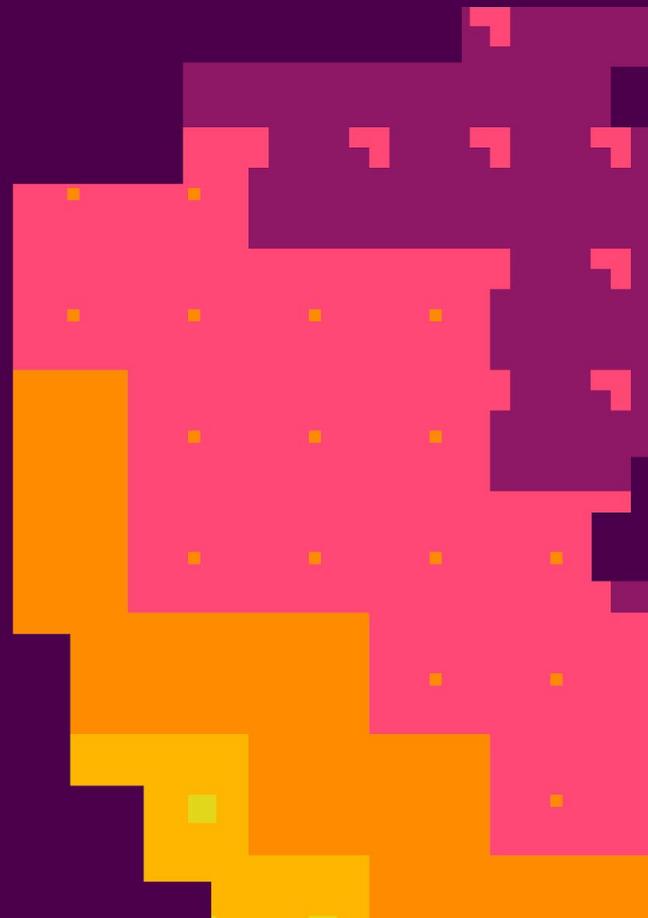


PENDOMONIUM 2023

Reducing dependencies and driving ROI with Pendo guides





Jonathon Wilson

Senior R&D Software
Systems Analyst,
Medidata Solutions

Introduction

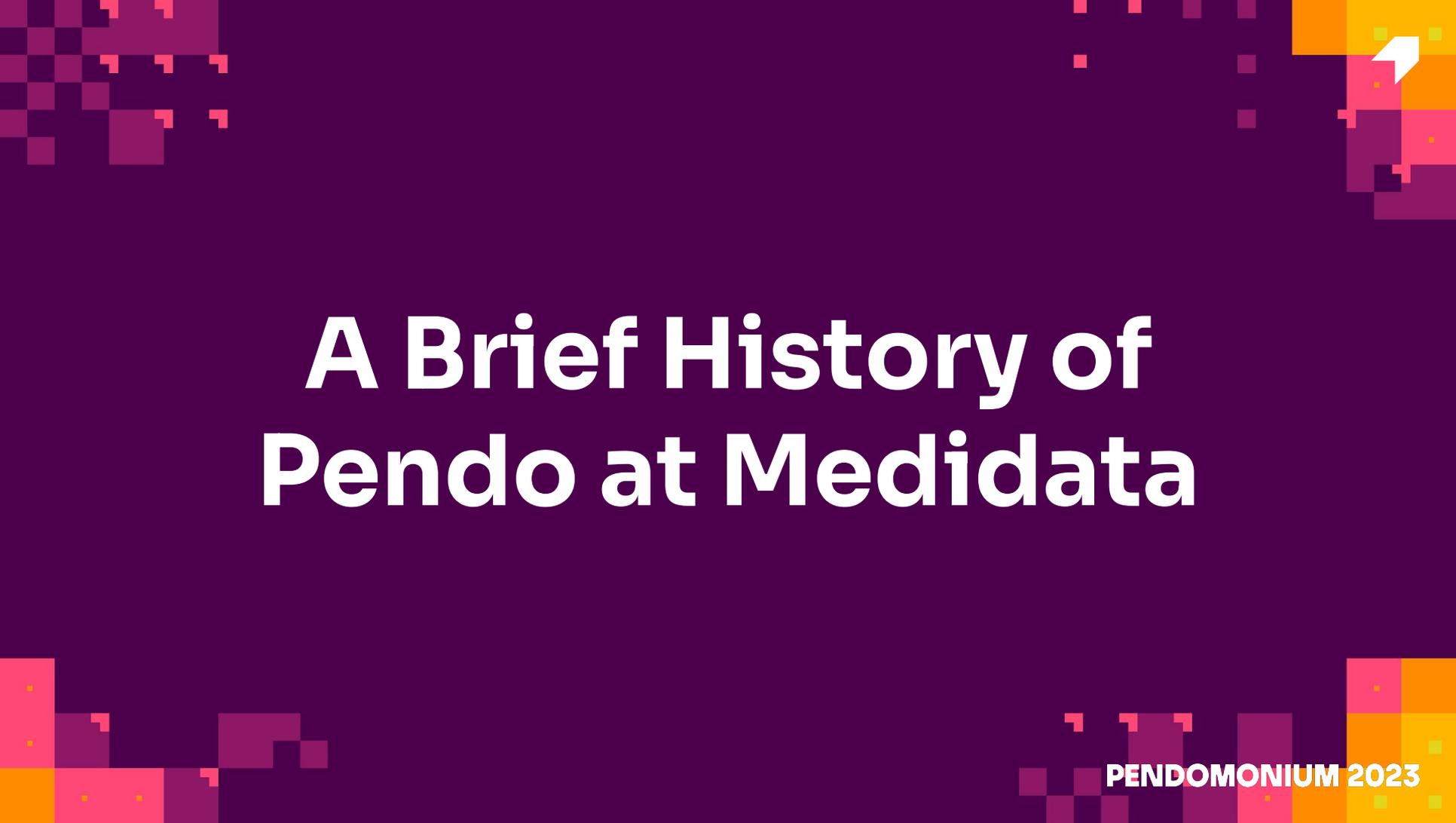
Introduction



- Jonathon Wilson
- Senior R&D Software Systems Analyst @ Medidata Solutions
- 6 years as a Technical Writer & 2 years as a Pendo Administrator
- Colorado Springs, CO
- I want to go to space more than anything in the world
- I'm a big ol Tolkien nerd – Yes I've seen Rings of Power, and yes I will talk about it

Agenda

- **A Brief History of Pendo at Medidata**
- **Efficiency, We Have a Problem**
- **Breaking Through**
 - System Notifications
 - Feedback Mechanisms
- **To Infinity and Beyond**



A Brief History of Pendo at Medidata

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A Brief History of Pendo at Medidata



Implemented
Pendo at Medidata

Launched Tech
Comms initiative
for Pendo Guides

Began asking how
we could improve
content delivery

2019

2020

2021

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2020 Pendo Guides Initiative



- About Pendo
- > Pendo Metrics
- Tag Product Pages and Features With Pendo
- ▼ Add and Manage Pendo Guides in the Product User Interface
 - Pendo Guide Tagging Standards
 - ▼ Progressive User Assistance (PUA)
 - Progressive User Assistance End-to-End Process
 - Progressive User Assistance Writing Styles, UX Guidelines, and
 - Metadata Pendo Admin Progressive User Assistance Implement
 - ▼ Progressive User Assistance UX Specifications
 - Pendo / UX Collaboration for Guides
- > Feature Release Announcements (FRA)
- > On Demand Show-me Videos (SMV)
- > Notifications (NOG)
- > Feature Alerts (FAL)
- > Product Enablement Guides (PEG)
- > Customer Satisfaction Surveys (CST)

Tooltip / Badge Settings	
Badge (Icon)	Yes
Badge (Icon) Location	Right of target
Badge (Icon) Size	12 x 12px
Badge (Icon) Color	Blue - #5EA8E6
Position of Popover	Dependent on page location of Target. Typically upper-right
Offset*	Unknown
Tooltip Behavior	Show only on a badge click
Popover/Tooltip Close	Close on click-off. See custom js for more details.
Badge Behavior	Always show badge
Frequency	Always show
Z-Index	100
PUA Badge Image	PUA Badge
Video Badge Image	Video Badge

Pendo WorkShops!

- Pendo WorkShops: Page and Feature Tagging! (Slide Deck) – Session 1
- Pendo WorkShops: Page and Feature Tagging! (Recording) – Session 1
- Pendo WorkShops: Utilizing Segmentation (Slide Deck) – Session 2
- Pendo WorkShops: Utilizing Segmentation (Recording) – Session 2
- Pendo WorkShops: Paths, Funnels, Data Explorer, and Dashboards (Slide Deck) – Session 3
- Pendo WorkShops: Paths, Funnels, Data Explorer, and Dashboards (Recording) – Session 3

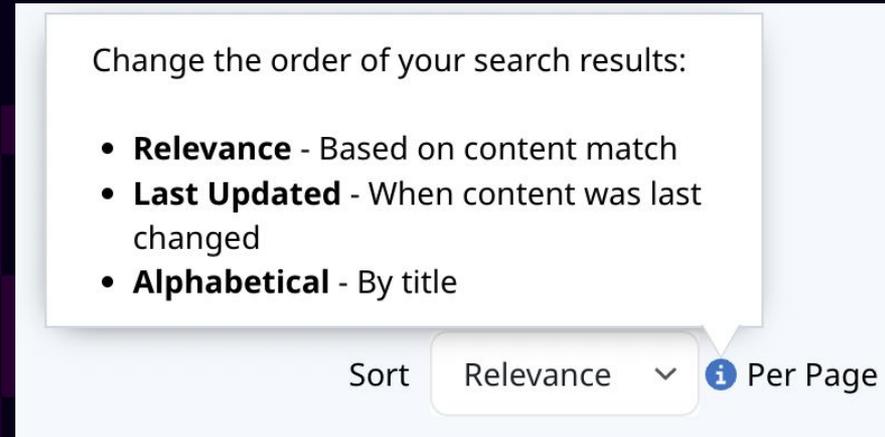
Pendo Workshops! Quick Bites Training Videos

- Creating Notification Guides (NOGs) in Pendo
- Creating Feature Release Announcements (FRAs) in Pendo
- Creating Banner Guides (BANS) in Pendo
- Creating Universal Product Tags in Pendo
- Targeting Linked URLs in Table Cells as Features (Troubleshooting)

- Collaborated to find best guide styles for a proof-of-concept
- Determined and documented content delivery best practices
- Worked with UX to develop initial guide templates

Progressive User Assistance

- Allows for on-screen contextual help
- Deep-linking
- Activation flexibility
- Replaces hard coded access points



Feature Alert Guides



Updates to API Gateway

Updates made to API Gateway introduced on 23-Sep-2022. For details, see the [Changelog](#).

Remind Me Tomorrow

Got it!

- Targets new features and available functionality
- Provided scheduled info about updates to docs
- In-app marketing

Feature Release Announcements



- Release notes for the day-to-day user
- Content agility
- Plug-and-play template
- High praise from users

Announcing a New Release

Data Reviewer July 2023

Save and Reuse Listing Configurations as Templates

You can save and store commonly used listing configurations as templates in your organization's global template library. You can then import your listing templates to reuse when creating new listings or within a study. [Learn More...](#)

Add Comments on Approved Listings Records

You can comment on record level results populated in approved listings. This enables you to record short notes and communicate with colleagues on specific findings and tasks related to data cleaning a specific listing. [Learn More...](#)

Mark Approved Listing Records as Reviewed

You can now mark approved listing records as reviewed. This enables you when parsing through data to more quickly and easily identify already reviewed data. Therefore, you can streamline and focus team efforts on records that require review. [Learn More...](#)

Query Submission Enhancement

When submitting queries, you can select within listing results the records that you want to submit a query against rather than selecting within the submit query window. This allows for better control and visibility into which records a query will be submitted against. [Learn More...](#)

Download and Export AI Data Reconciliation Reports

You can download AI Data Reconciliation reports to better share and facilitate report reviews among site monitors and site stakeholders.

To see all features and enhancements for each Data Reviewer release, see [Medidata Detect Releases History](#).

Remind me tomorrow

Got it



Efficiency, We Have a Problem

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Efficiency, We Have a Problem



Problems with Current Notification Implementation

- Builds can be consuming
- Dependent on engineering, testing, and validation
- Documentation required
- Release dependencies

Problems with Traditional Feedback Mechanisms

- UX has little time to develop their own mechanisms
- Low ROI due to high overhead to traditional recruitment tools
- Difficult to ensure successful outreach

Efficiency, We Have a Problem

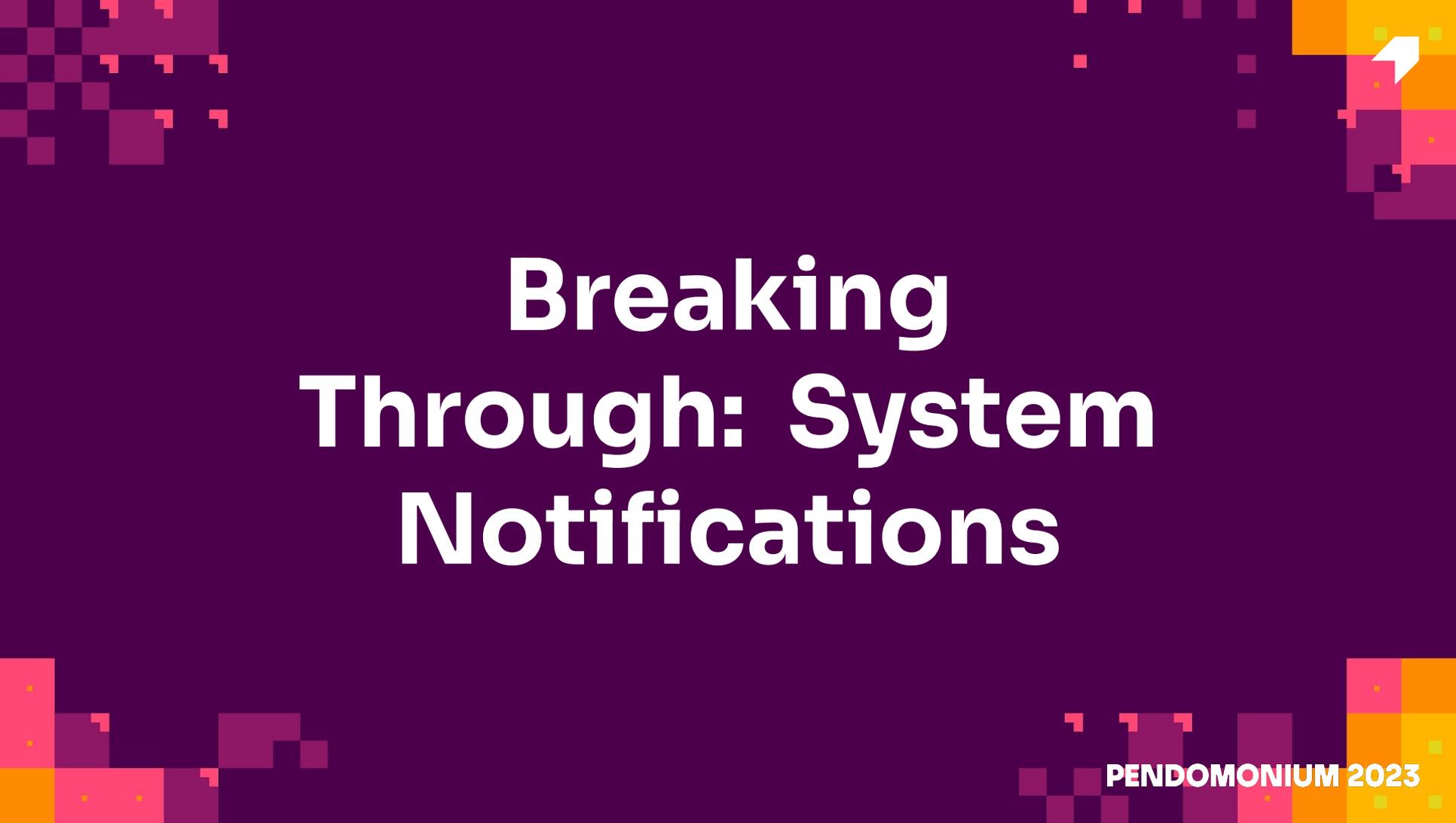


Need: System Notifications

- Downtime messaging
- Changes to system functionality such as 2FA
- Low engagement for new features
- Upcoming feature releases

Need: Feedback Mechanisms

- Product-wide feedback surveys
- Feature-based feedback surveys
- Recruitment forms



Breaking Through: System Notifications

Notification Guides



Check out the Platform Digest!

The [July Platform Digest](#) is now available!

This digest is a consolidated page of Platform release newsletters, notes, as well as past and upcoming features! These features are focused on infrastructure and interface related changes. Read the digest to learn more about planned updates, releases and more for the month of June; the Medidata capabilities covered here are:

- iMedidata
- Cloud Administration
- Notification Center
- Homepage
- Navigation
- Login
- Audit Viewer, and
- Cloud Administration APIs.

Each month, a new version will be published [here](#).

Please fill out this [feedback form](#) if you have any comments or feedback!

Remind Me Tomorrow

Got it!

- Removes points off the engineering board
- Useful system information and callouts
- Removes traditional dependencies and promotes efficiency

Product Enablement Guides



- A call-to-action for users
- Drives engagement on underutilized features
- Can be adapted to include show-me videos
- Improves UX and user understanding

Helpful Hints

Spend too much time searching for and answering queries? Remember you can work through your overall to-do list in Rave EDC Tasks!

The video shows a software interface with a 'Demography' section. It highlights several data entry fields with error messages: 'Data Entry Error' for 'Date of Birth', 'Age', and 'Subject Race'. There are also red error messages: 'Has the form been added? Please confirm.' and 'Data is required. Please complete.' The video player includes a progress bar at 0:00 / 0:50 and buttons for 'Remind Me Tomorrow' and 'Got it!'.

Downtime Messages



Study Feasibility Downtime Announcement

Application updates are in progress. Some functionalities may be unavailable in Study Feasibility between **5:00 AM EST and 10:00 AM EST today**.

Got it

- Easy to manage – plug and play!
- Fastest growing guide
- Built for pre and on-time announcements

System Notifications – By the Numbers



2

Roughly two sprints saved per guide in dev, test, validation, and deployment work

\$3,750

Estimated cost per guide build through traditional development

82

Number of notification guides we built for our teams in 2022

System Notifications – By the Numbers



\$307,500

Total estimated cost avoidance for development, testing, validation, and deployment time in 2022

System Notifications – By the Numbers



\$551,250

**Total estimated avoidance in development,
testing, validation, and deployment time in 2023
based on current pace of guide development**



Breaking Through: Feedback Mechanisms

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Feedback Surveys



Step 2 of 3 ✕

What is your role?

- Data Manager
- Clinical Research Associate (CRA)
- Developer
- Other
- Other
- Other

Next **Back**

- **K.I.S.S.**
 - Don't overburden the user
 - Less than 2 minutes
 - 7 questions or fewer
- Target specific features or an entire application
- Segmentation is key

Recruitment Forms

- Provide huge ROI over traditional recruitment methods
- Templated for ease of deployment
- Much more effective than an email campaign (in my opinion)

Help Us Improve Medidata Applications!

Sign up now to participate in 30-45 minute feedback sessions to help us understand how we can improve our products and better support the work you do.

What is your role?

Clinical Data Entry
 Data Manager
 Principal Investigator
 Study Builder
 Study Coordinator (CRC)
 Study Manager
 Study Monitor (CRA)
 Multiple / Other

Tell us what your role is if you selected 'Multiple / Other'.

What Medidata products do you use?

Rave EDC
 RTSM
 CTMS
 Rave Architect
 Patient Cloud
 MedidataAI
 Detect
 Multiple/Other

Tell us which products you use if you selected 'Multiple/Other'.

Email address

Is there anything else we should know about your participation?

Feedback Surveys – By the Numbers



13

Total surveys delivered with Pendo in the last two years

96K

Total number of impressions gathered by the surveys delivered

1000s

Responses across all of our surveys

Recruitment Forms – By the Numbers



2

Number of recruitment forms delivered on our platform in 2023

3,029

Total users who signed up for live feedback sessions with our research team

\$40

Cost per respondent using a traditional recruitment tool

Recruitment Forms – By the Numbers



\$121,160

Total estimated avoidance using Pendo to recruit users over a traditional recruitment tool

Total Time/Cost Avoidance – By the Numbers



\$672,410

**Total estimated avoidance in 2023 using Pendo to
deliver notifications and feedback mechanisms**

To Infinity and Beyond

PENDOMONIUM 2023

To Infinity and Beyond



■ Guide redesign (2023)

- Working cross-functionally to rebuild guides to match our new design system

■ Initiating a Pendo Partners program (2023 - 2024)

- Creating a working group of cross-platform team members to own day-to-day Pendo ops across different areas of product and the business

■ Contextual Help Takeover (2023 - 2024)

- As we roll out a new Platform UI, we are leveraging Resource Center to fully replace the previously hardcoded delivery of contextual help



Thank you!

PENDOMONIUM 2023



PENDO MONIUM 2023