

**PENDOMONIUM 2023**

# Using behavior insights to prioritize product efforts and improve internal tools

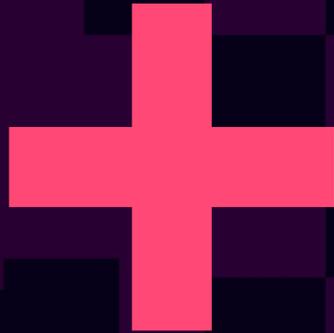
Pendo for SaaS CRM





# Will Culbertson

Director of Data & Analytics  
Fidelity Investments



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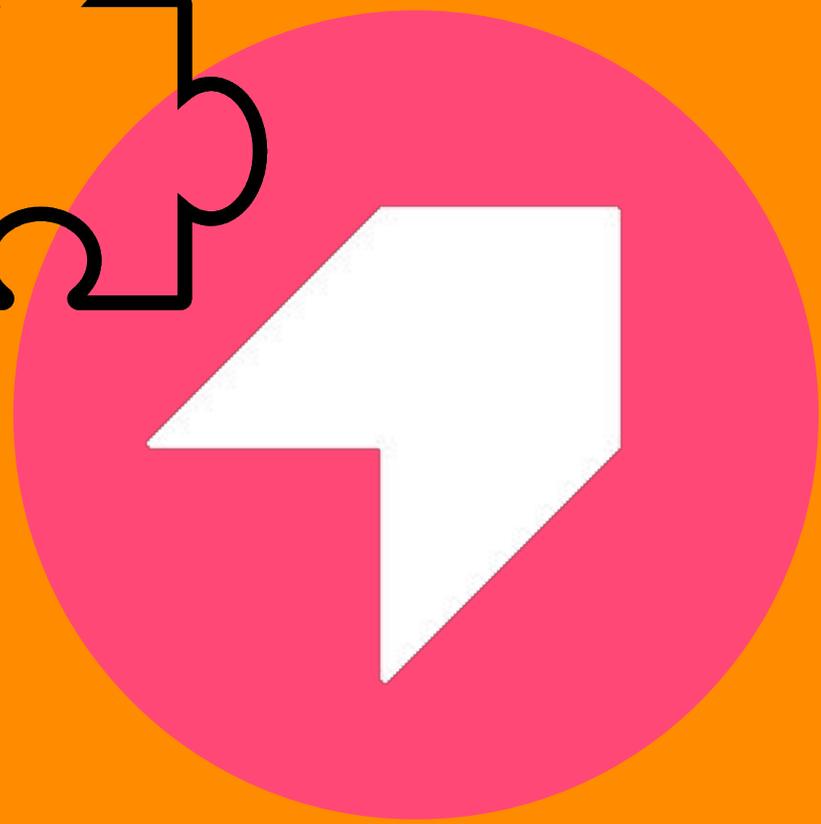
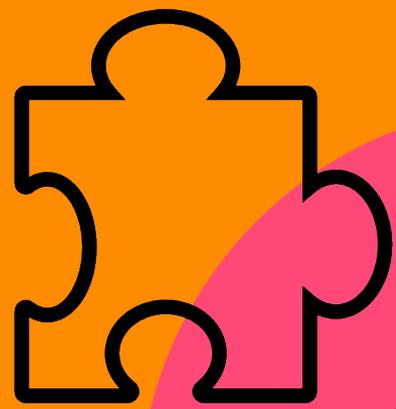
# Agenda

- Sustain Performance
- Enhance User Experience
- Reduce Time to Market



# Sustain Performance

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# Why Doesn't Anyone Use this Feature?



**ACME APP**  
Page and Feature Tagging

## Dashboard

**Manage Features & Pages**

- Features
- Pages

ON THIS PAGE

- Dashboard
- pipeline.chart
- Settings

SITEWIDE

- Heatmap
- Segment: Everyone

Few Number of Clicks from Feb 17, 2016 - Apr 30, 2018 Many

Cancel Tag Feature

**Open Opportunities**

Name	Account
Schwalter Ltd	Ripplin and Sons
Champlin LLC	Beatty LLC
Schmitt Group	Nikolaus Inc
McDermott Inc	Tretuel and Sons
Christiansen and Sons	Hansen Ltd
Turcotte LLC	Kuphal Inc
Jacobs Group	Williamson Inc
Buckridge LLC	Wyman Group
Upton Group	Wuckert and Sons

**Pipeline**

- Qual
- Proposal
- Sol Pres.
- Pending
- Sol Acc.

Made with by Pendo Sales Engineering



# Improve Employee Experience

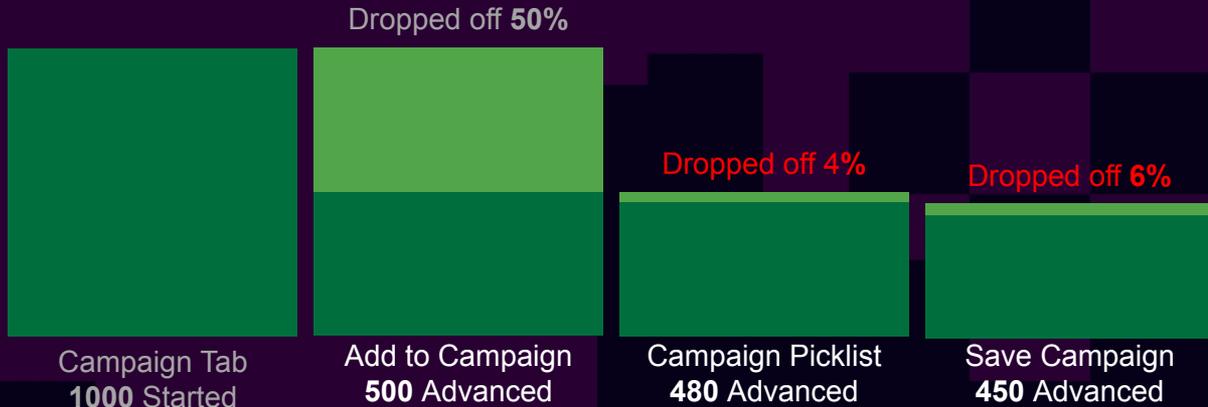


# Why Do Reps Give Up After Searching?



Workflow Success Rate BEFORE  
80/500

16%



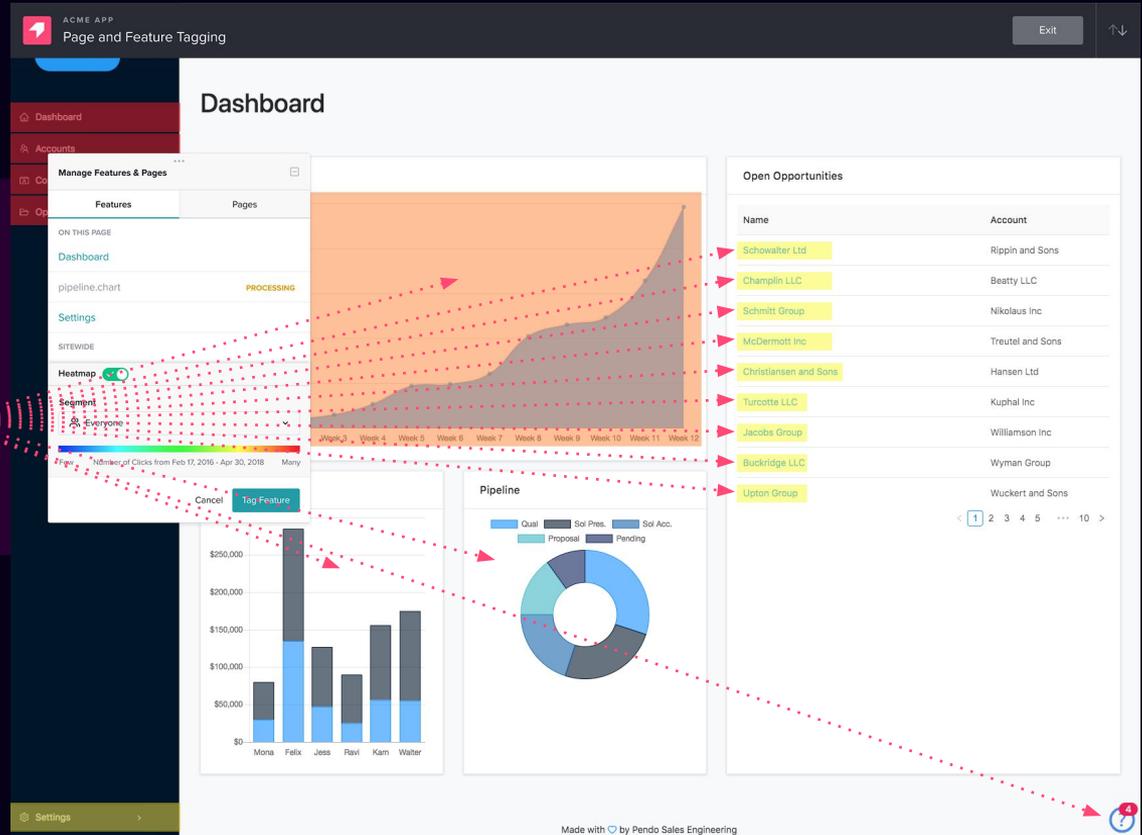
Workflow Success Rate AFTER  
450/500

90%

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# Implementing the Negotiated Metric

Dashboard Adoption  
Interactors / Visitors





# Reduce Time to Market

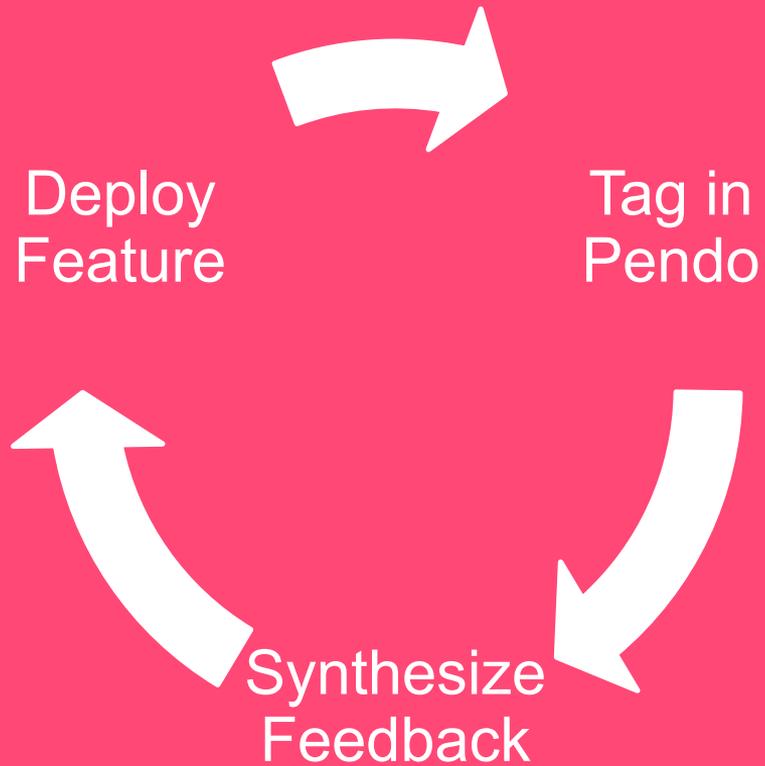
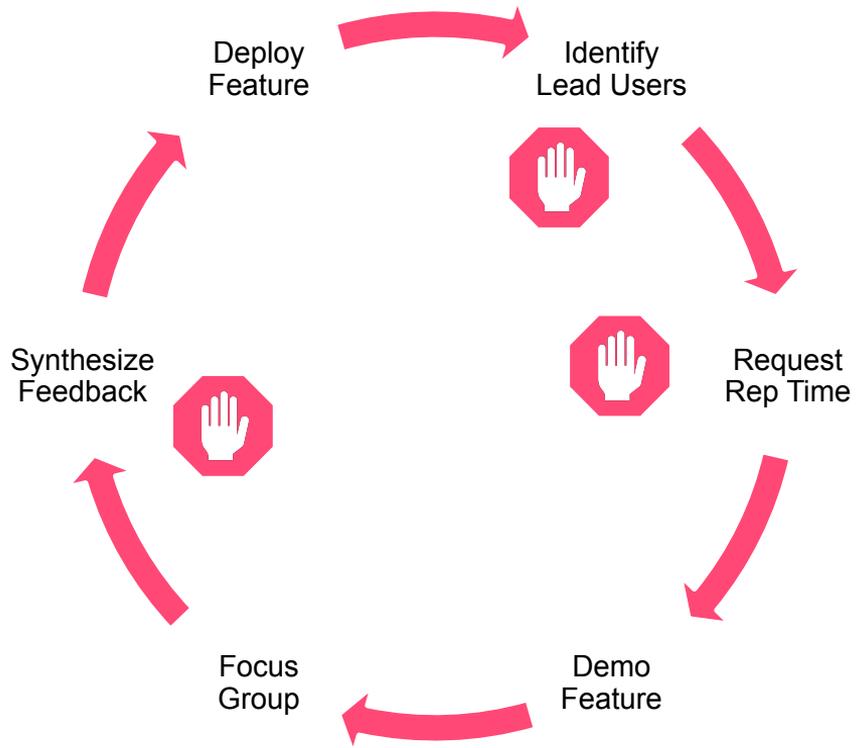
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**User experience**

**Design**







# Why is “Client” Clicked More Often?



Appointment	Client	Date
Investment Advice	ANDREW ST. BERNARD	21 Nov 2023
Retirement Planning	JAMES HALPERT	10 Nov 2023
Investment Advice	PAM HORNETSLY	16 Nov 2023
Tax Planning	SCHWIGHT DRUTE	14 Nov 2023
Retirement Planning	SCHWIGHT DRUTE	23 Nov 2023
Wealth Management Application	MICHAEL SCARN	17 Nov 2023
Wealth Management Application	MICHAEL SCARN	10 Nov 2023
Wealth Management Application	MICHAEL SCARN	24 Nov 2023
Wealth Management Application	MICHAEL SCARN	1 Dec 2023
Wealth Management Application	MICHAEL SCARN	8 Dec 2023

Manage Features & Pages

Features | Pages

ON THIS PAGE

Dashboard

pipeline.chart **PROCESSING**

Settings

SITEWIDE

Heatmap

Segment

Everyone

Few Number of Clicks from Feb 17, 2016 - Apr 30, 2018 Many

Cancel Tag Feature

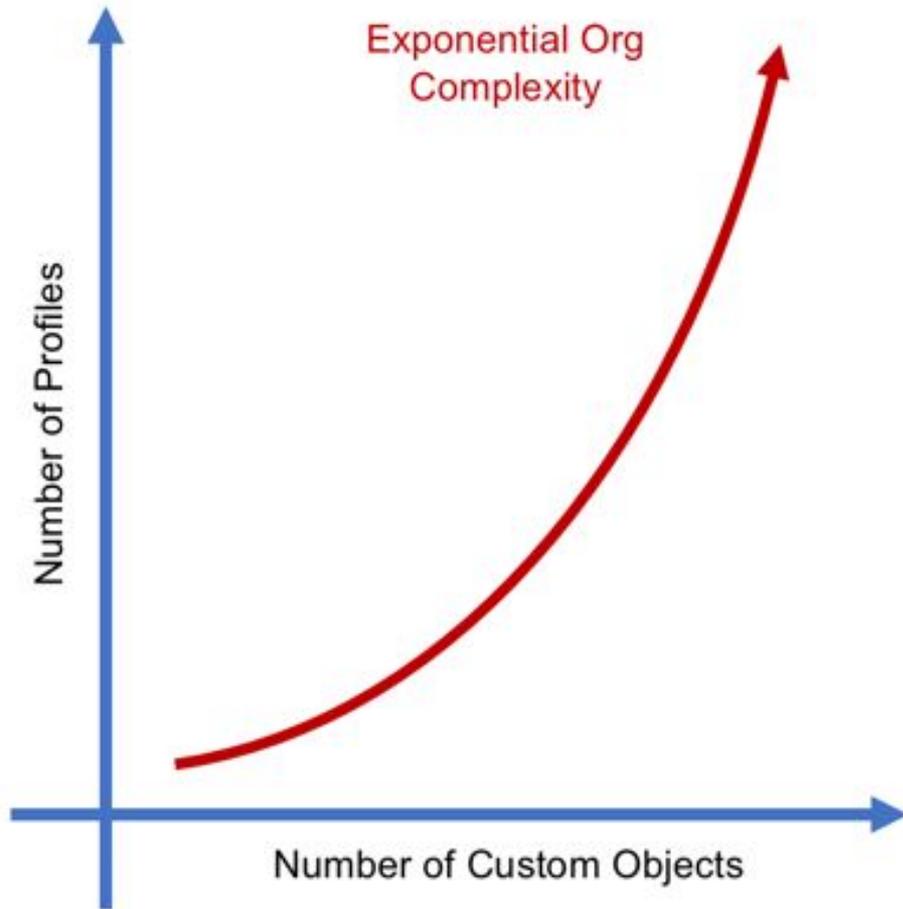


# What should we work on next?

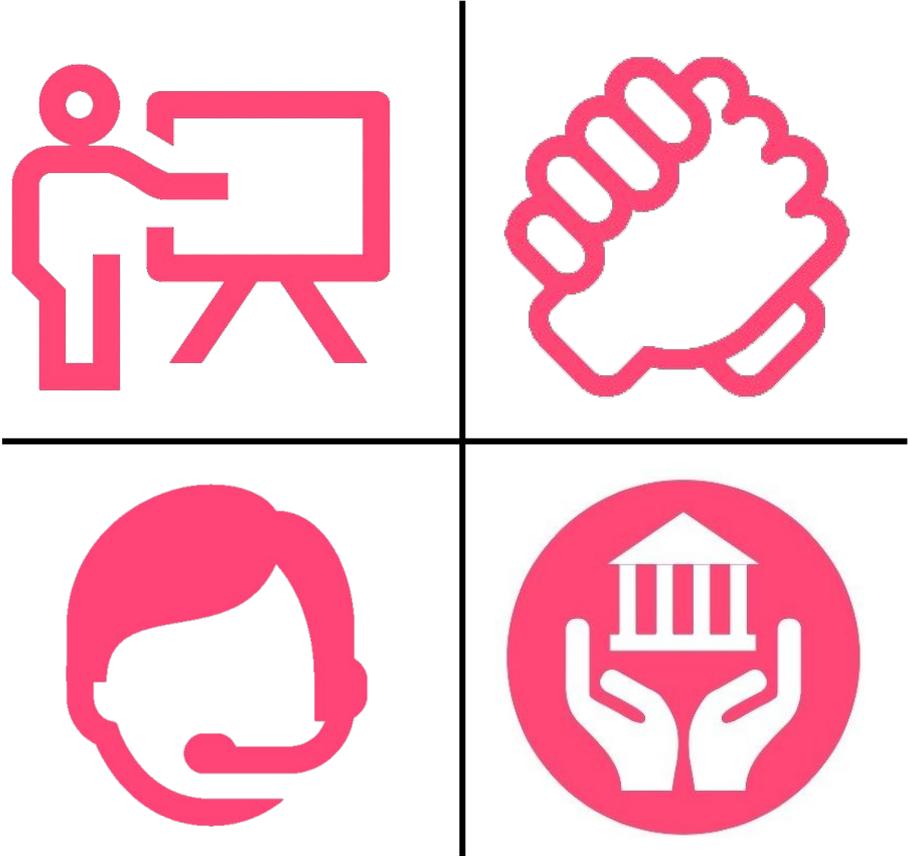




# How to Succeed on SaaS Platforms



# Doc-u-men-TA-tion (n): Broccoli for SW Devs





**Thank you!**

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# PENDO MONIUM 2023