



The Power of Pendo: Driving business outcomes using core Pendo features



Vasek Nemecek

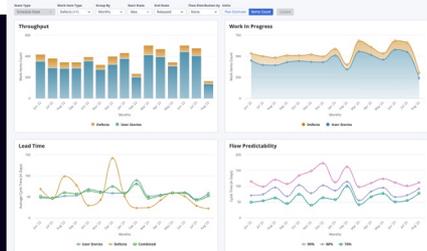
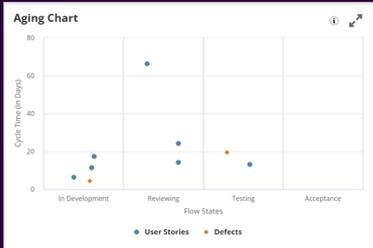
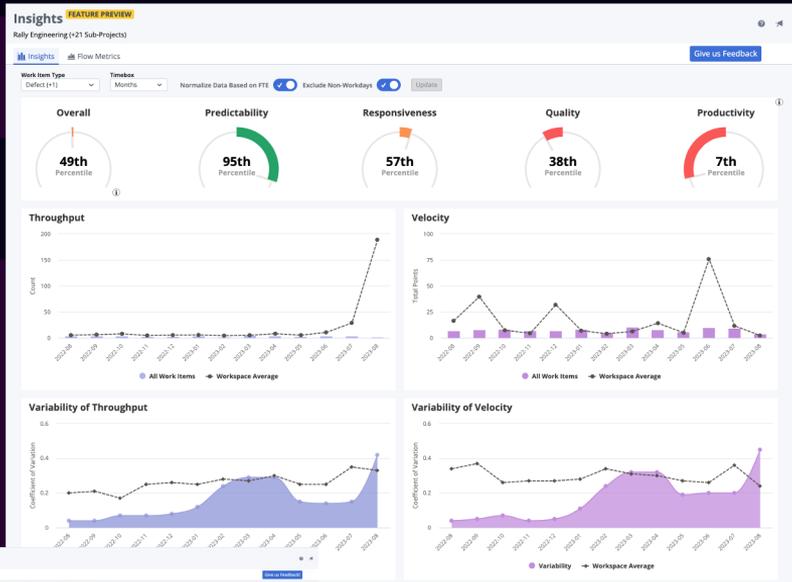
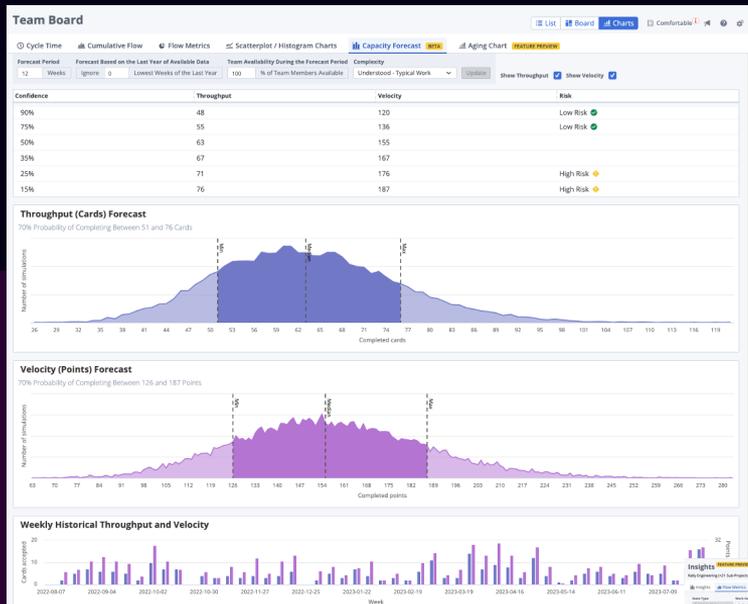
Product Manager,
Broadcom (Rally)



Matt Gorbsky

Product Manager,
Broadcom (Rally)

What We Do

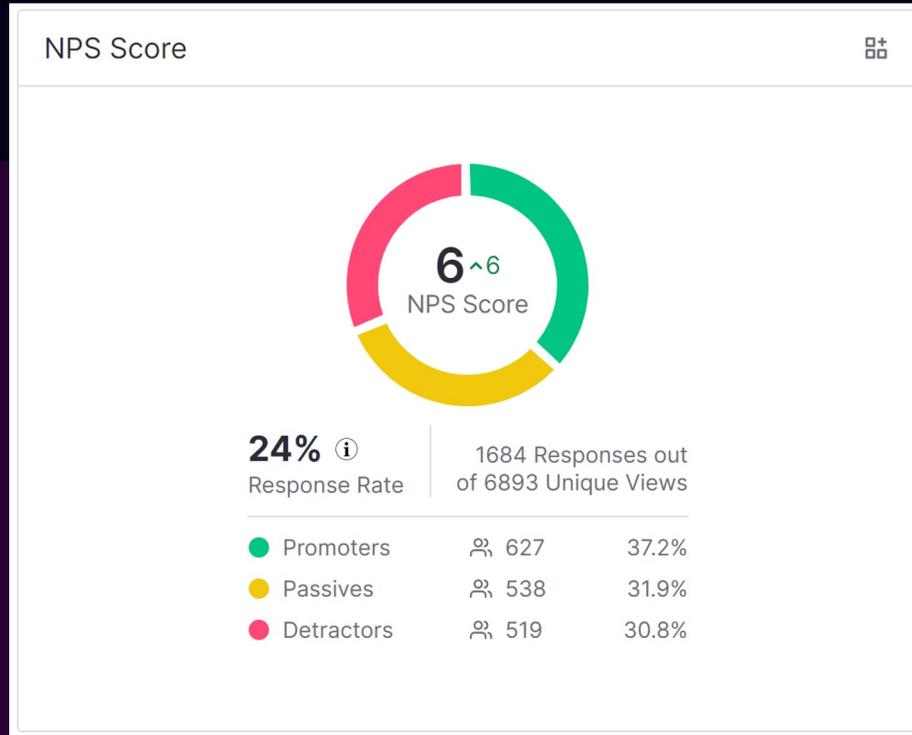


Agenda

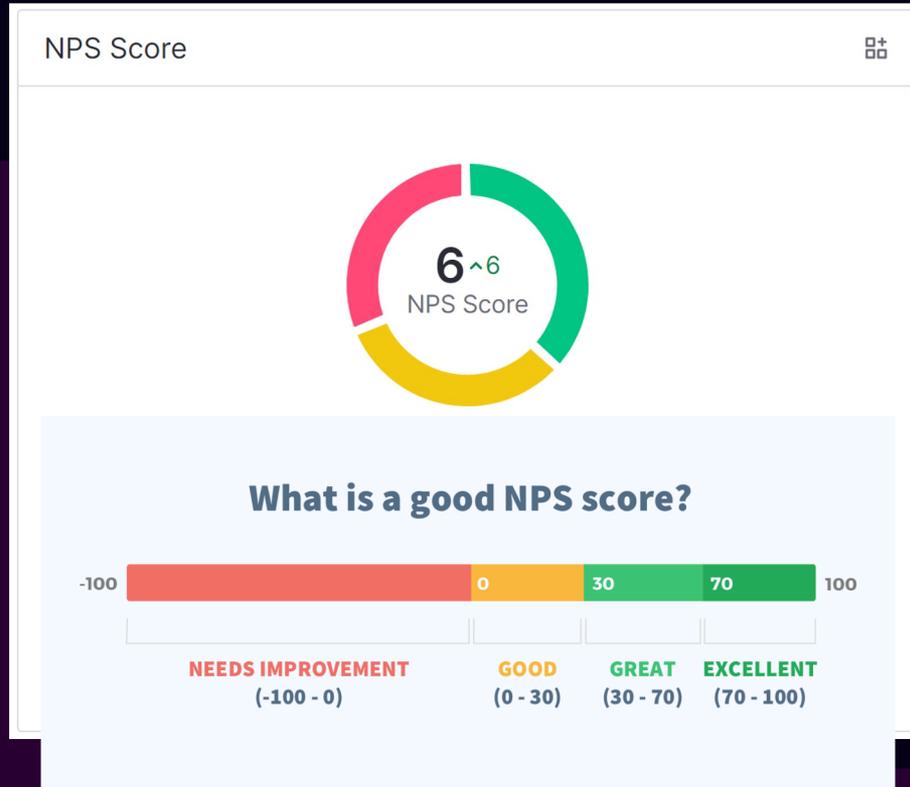
- Define business outcomes
- Establish product goals
- Experiment, change behaviors, learn, adapt
- Connect back to outcomes
- Best practices & summary

Define Business Outcomes

Net Promoter Score



Net Promoter Score





We can do better than 6
But how?

Feedback From NPS

“Rally reporting needs to be more robust and should be able to filter based on sprint attributes.”

“I am having trouble creating analytics and reporting that represent multiple projects. For the views that I do use I have to combine them together because one view shows me some reporting and then the other view shows me a different reporting.”

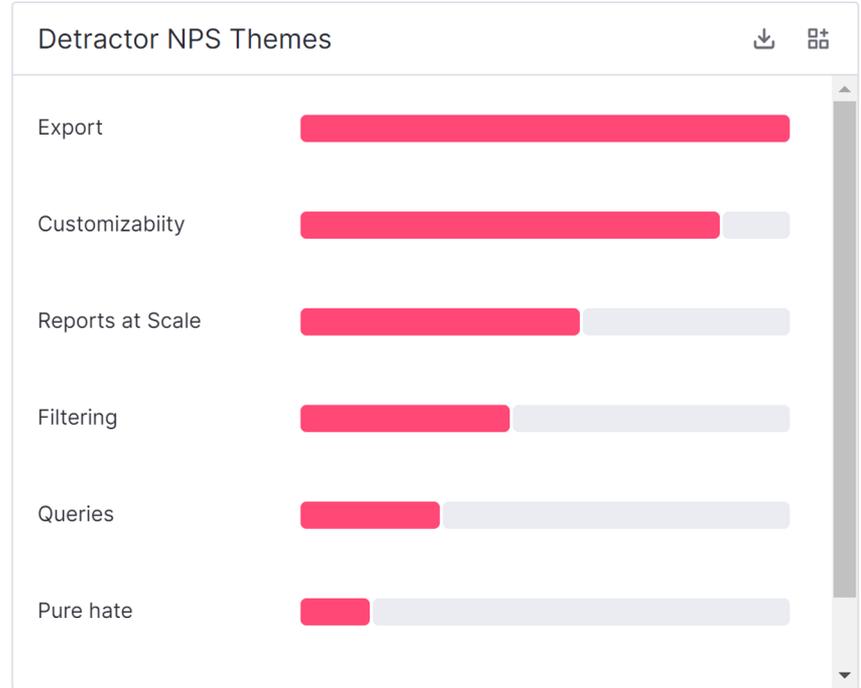


The screenshot shows the 'Analytics / Reporting NPS Survey' interface. At the top, there are navigation options like 'Back to NPS', 'CA AgileCentral', and 'Analytics / Reporting'. Below that, it says 'NPS to evaluate analytic capabilities by beginning of FY23'. There are tabs for 'Overview', 'Responses', 'Views', and 'Settings'. The 'Responses' tab is active, showing a list of 1203 responses. The table has columns for 'Value ID', 'Date', 'Rating', 'Response Group', 'Response', and 'NPS Themes'. The responses are sorted by date, with the most recent at the top.

Value ID	Date	Rating	Response Group	Response	NPS Themes
450185437964	Jan 3, 2023	6	Detractor	Would like to be able to have more access to building own reports.	
247827900072	Jan 4, 2023	7	Passive	Would be nice if it can be customized according to our need.	
388617826792	Jan 5, 2023	6	Detractor	Would appreciate a pretty story and feature cycle time report.	
27858589972	Jan 5, 2023	9	Promoter	While some reports are easy to build others are not. Examples are those needing items within 30 days of creation date, close date or any other date. Only some of the ... See more	
34484256383	Jan 5, 2023	9	Promoter	Weekly once	
92734889002	Jan 5, 2023	7	Passive	We need to have individual level report where we can see a resource total work and number of defects against his work in git or jira.	
375069332284	Jan 5, 2023	10	Promoter	We need more tools and being customized for our project is important.	
307358844736	Jan 5, 2023	9	Promoter	We are required to use metrics as a team. So, I would with my teammates to understand the values related to our board in Rally.	
40089182280	Jan 2, 2023	10	Promoter	very useful for me	
501793993864	Jan 5, 2023	9	Promoter	Very useful but there are some bugs sometimes	
308247182272	Jan 6, 2023	10	Promoter	Very powerful graphs which helps me every day as a scrum master thank you. Rally is very user friendly	
613138870093	Jan 2, 2023	10	Promoter	Very Good	
4583387320	Jan 5, 2023	9	Promoter	Very casually worded survey question... and the big font really gets your attention!	
643014828319	Jan 5, 2023	9	Promoter	User friendly and quick response	
294127976376	Jan 2, 2023	10	Promoter	User friendly	

NPS Themes

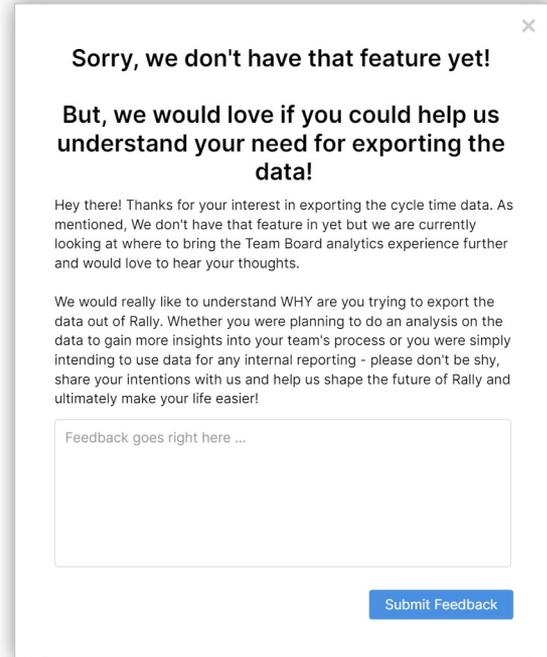
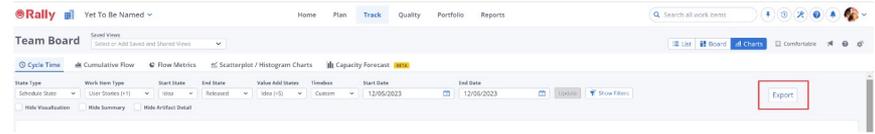
- Organize and analyze NPS faster
- Quickly able to identify export capability (or lack thereof) as a common theme from our detractors



Discovery

Export - The “fake” button

- Learn what actions users wanted to take and capture the why
- Kill bad ideas quickly
- No dev work required



Discovery Outcomes & Insights



Response: I really can't believe that you put an export button here but don't have the functionality in place. It is incredibly annoying. You must know from people that they want to export in order to graph and report on data. Enable the functionality or remove the button.

Response: I want to snapshot this data so that we review the metrics periodically, and see how we are trending over time. It would be easier to use excel to compare numbers over time and graph a trend.

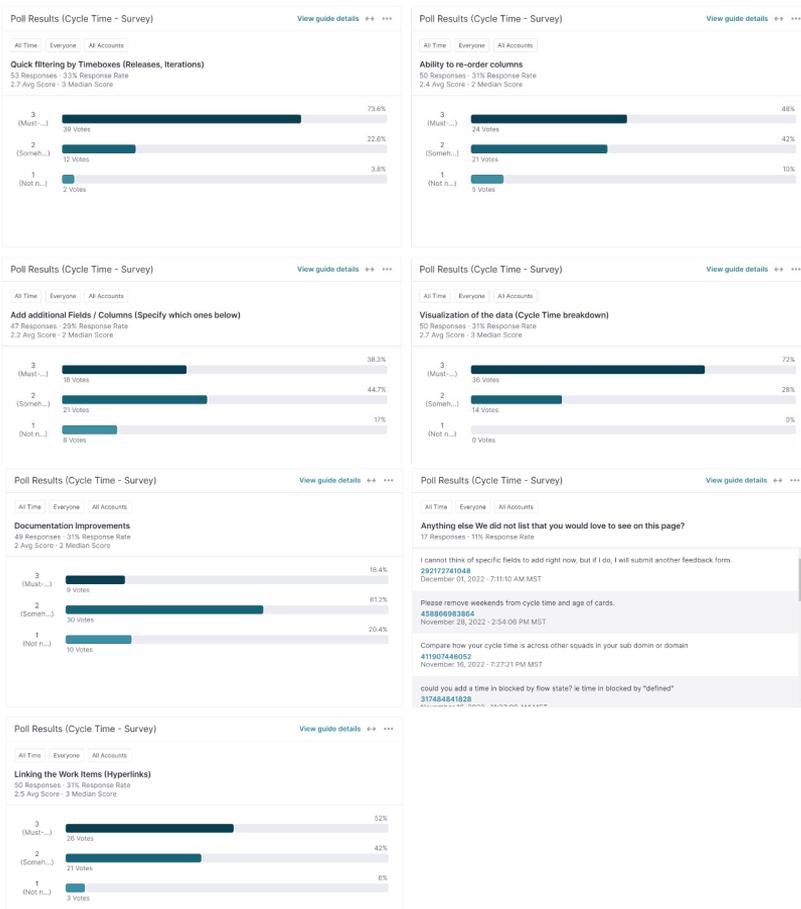
Response: I want to graph the data and compare month to month. This feature "exists" in the Reports area of rally, but that data does not match what's in this page. Would also be nice if the data in this were able to remove weekends

Response: Why do you have an export button if we cannot export? Put a "Coming Soon!" badge on it, or something. Come on Rally, I don't want to play "Does this button actually do anything" going forward.

Response: I'm interested in getting visual representations of the data. Such as trend lines and scatter plots. I would also like to have the data filtered by 'plan estimate' so that we can see how cycle time is distributed by points.

Response: Hi Rally, Exporting the data allows longer term analysis for exploring trends. Right now you can't produce consolidated data for an ART or easily export teams so you can show stats and trends side by side. Creating anonymised reports of key metrics like time to market, predictability, customer satisfaction, team satisfaction and business value supports events like I&A's as well as gamification of #BVSSH. If you'd like to discuss more feel free to email me on [redacted] happy to help. This is a huge leap forward (don't get me wrong over a decade after your competitors but credit where credit is due) there's just a long way still for it to be as useful as your competitors :-)

Prioritizing Requests



- Validate and prioritize product features using guides
- Get rid of bad ideas quickly

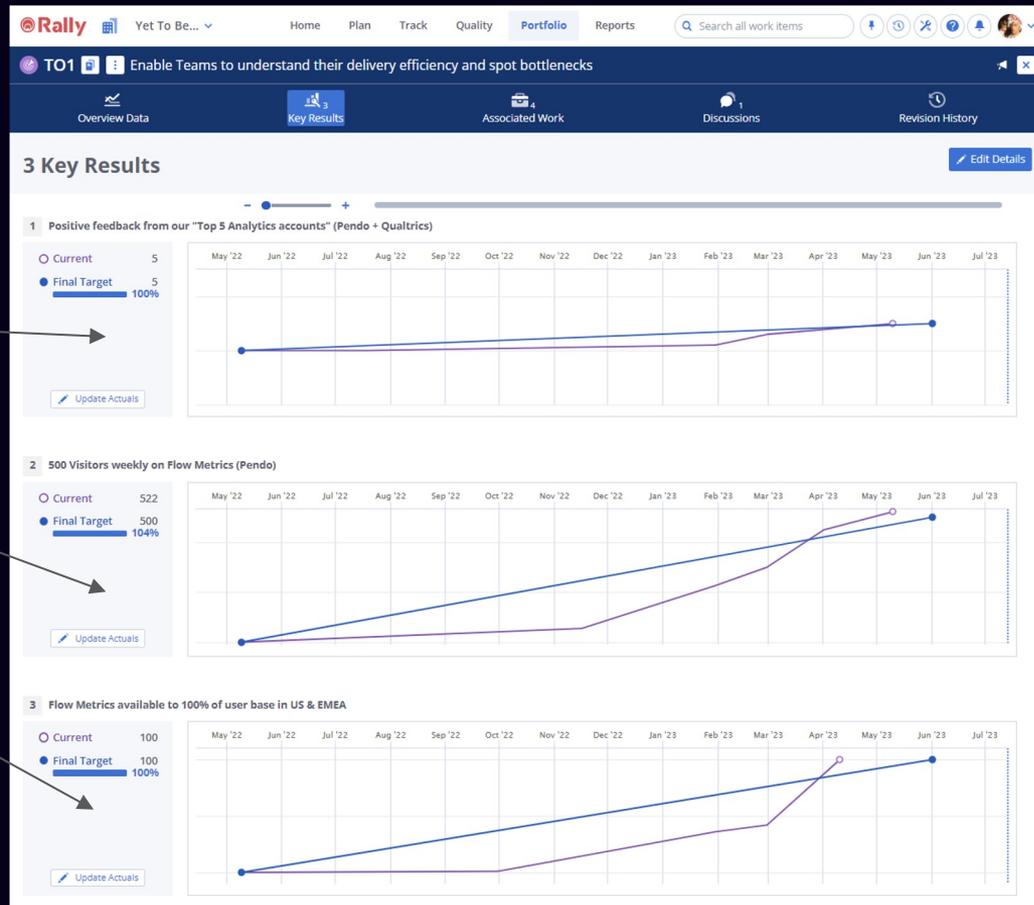
Defined Business Outcomes



- Increase in customer satisfaction
- Increased retention
- Higher customer lifetime value

Establish Product Goals

Set Objectives



Goals



ONGOING GOAL FOR NEW - TEAM BOARD - CHARTS - FLOW METRICS

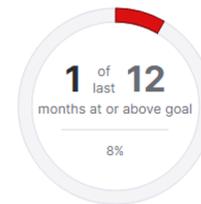
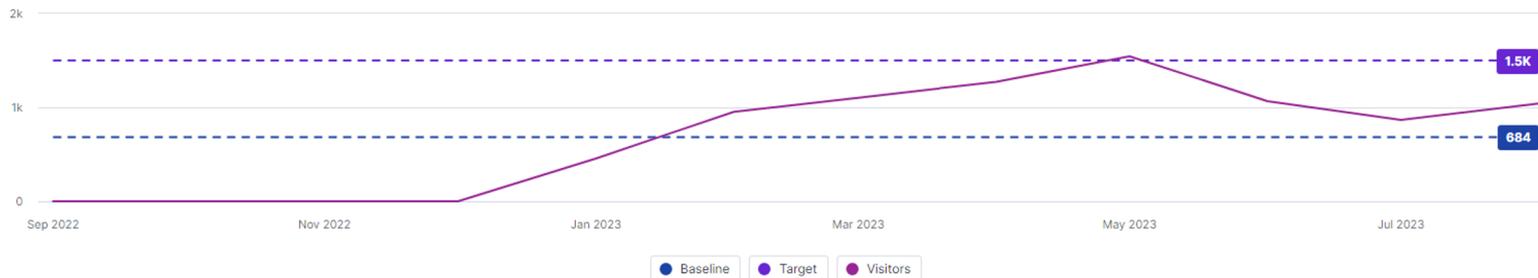
Add to Dashboard

Everyone All Accounts

Goal target is 816 Visitors (119%) above the average baseline

Date Range

Last 365 Days



Goal Target
1.5K Monthly Visitors

Page
NEW - Team Board - Chart...
Analytics / Reporting

NUMBER OF VISITORS

4,563

NUMBER OF ACCOUNTS

176

AVERAGE TIME

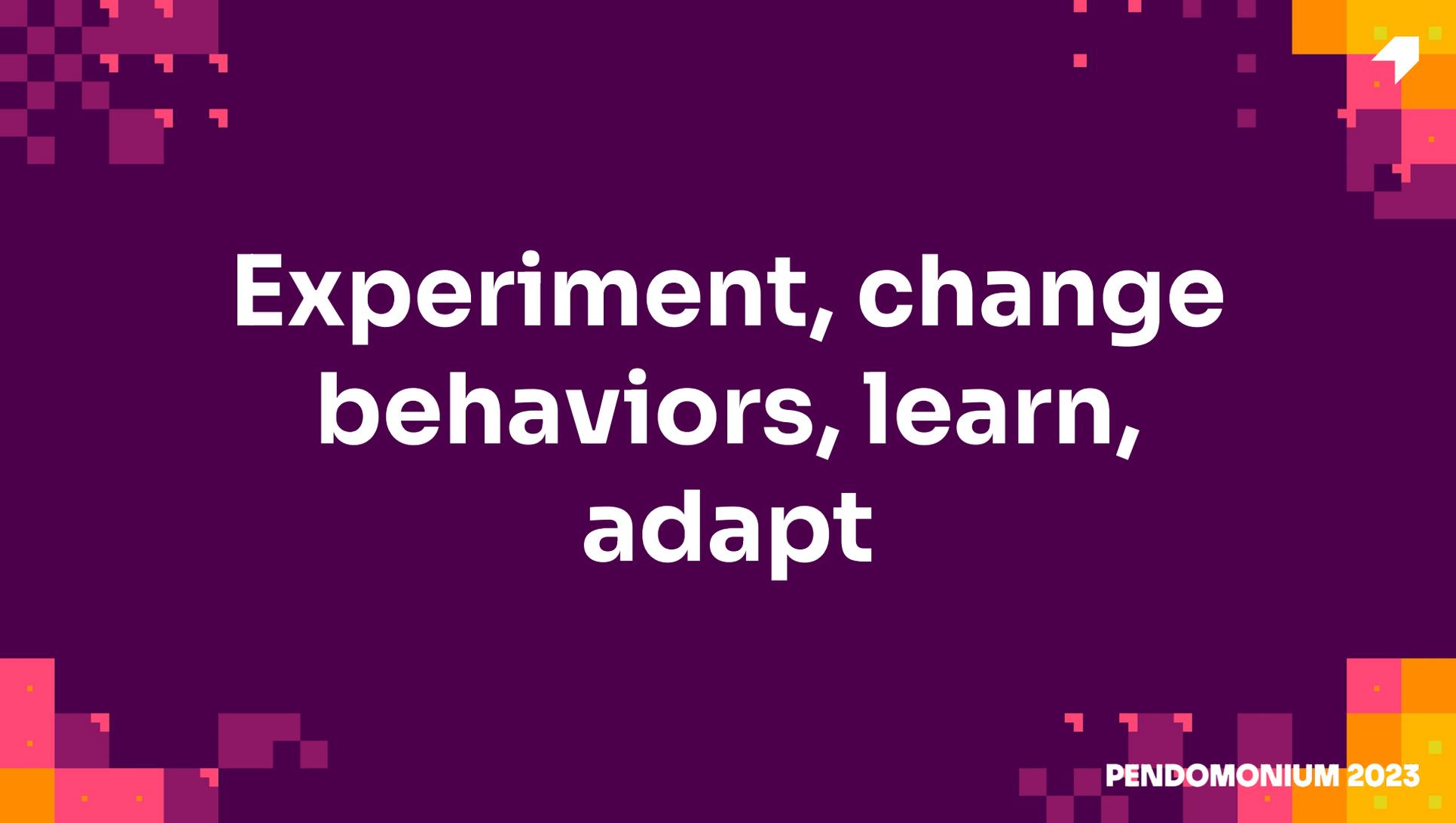
4m 8s

USER/DAY

Defined Product Goals



- Increase adoption of analytics capabilities by 40%
- Reduce enhancement requests for export capabilities
- Raise product area NPS to 30



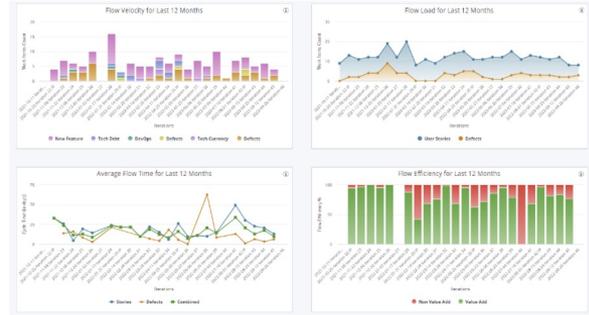
**Experiment, change
behaviors, learn,
adapt**

Experiment 2

New Feature Announcements / Guides

- Segments used to target users of specific pages and capabilities
- Product announcements added to Resource Center

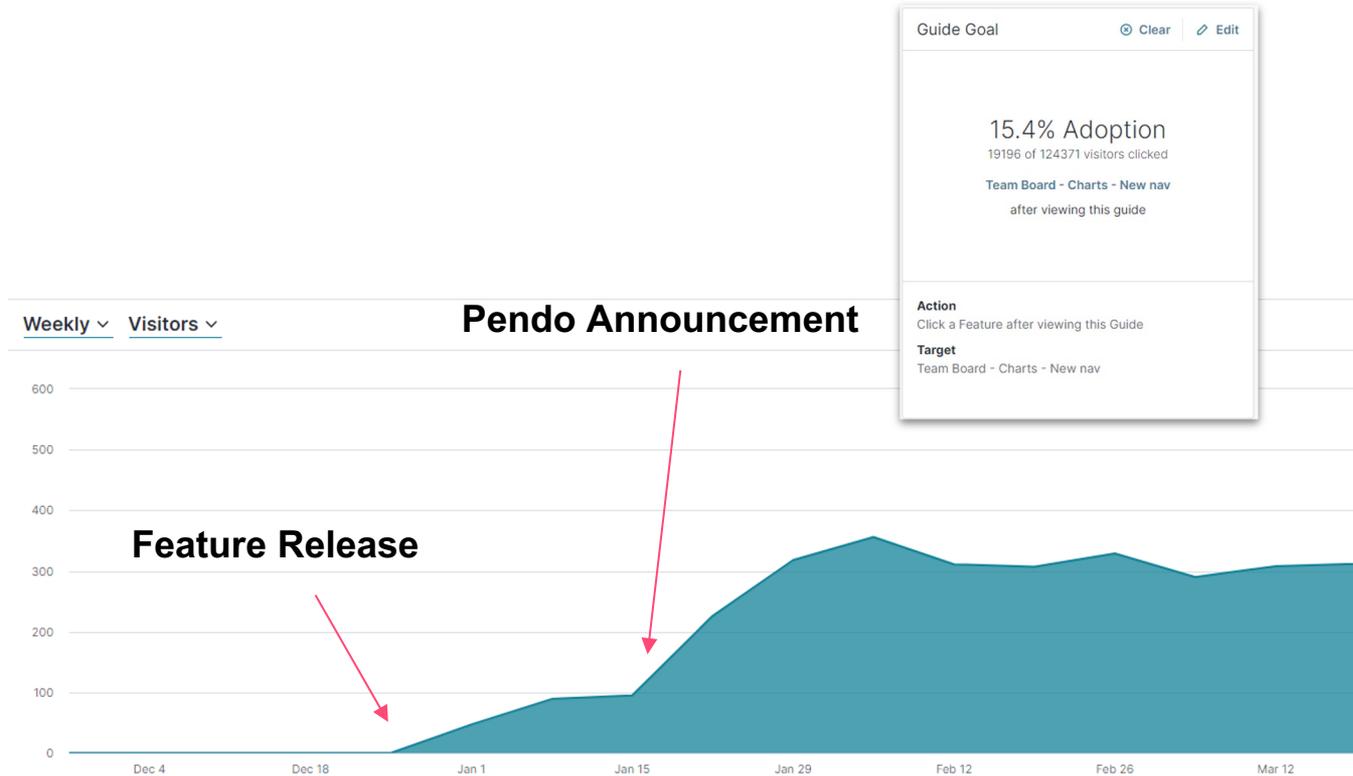
Flow Metrics are Here!



Flow metrics are now available in your Team Board to help you understand how your team is doing. If you are interested in seeing your team's Flow Velocity, Load, Efficiency, Predictability, and Flow Time - Visit our newly redesigned Charts!

[Take me there](#)

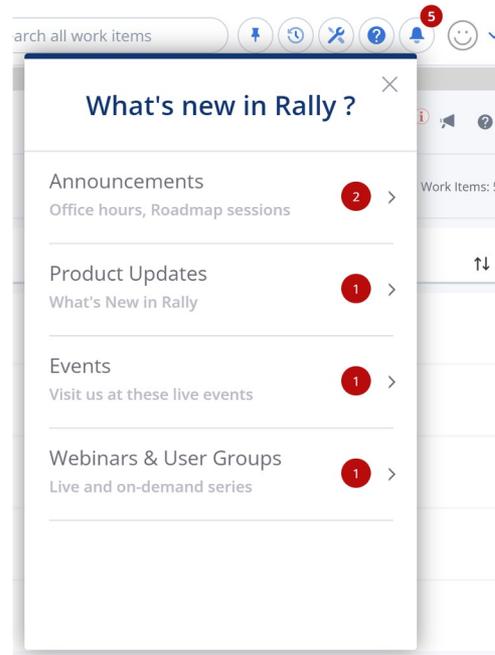
Experiment 2 - Outcomes



Experiment 3

Pendo Resource Center & Targeted Guides

- Driving training, webinars, and office hour attendance
- **Increase awareness** of new product features
- Pendo segments



Q2 Roadmap Session



May 3, 2023 - 1:00 PM ET
Join the Rally Product Team as we provide an overview of what's new and what's coming in Rally!

[Register >](#)

Rally VSM Webinar

EPISODE 3: LEARN HOW PRODUCT CAPABILITIES RELATE TO EXECUTION OUTCOMES.

ValueOps

May 30 2023, 10:00 AM PDT
Presented by: Matt Gorbosky & Vasek Nemecek

Clear goals and check-in points help ensure that you're not wasting resources on unwanted features or things that don't immediately add value.

Rally helps you track productivity and project quality in a way that ensures teams are informed, engaged, and happy. And, Rally gives you the information you need to pivot quickly when the need arises.

We will dive into the data behind these capabilities and understand how these support your value streams:

- Portfolio Kanban
- Plan Progression
- Release Tracking
- Risk Dashboards
- Milestone Reports
- Team Planning

Join us as we advance your knowledge around the data and analytics that support your value streams.

[Register >](#)

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Experiment 3 - Outcomes



Guide Goal Clear Edit

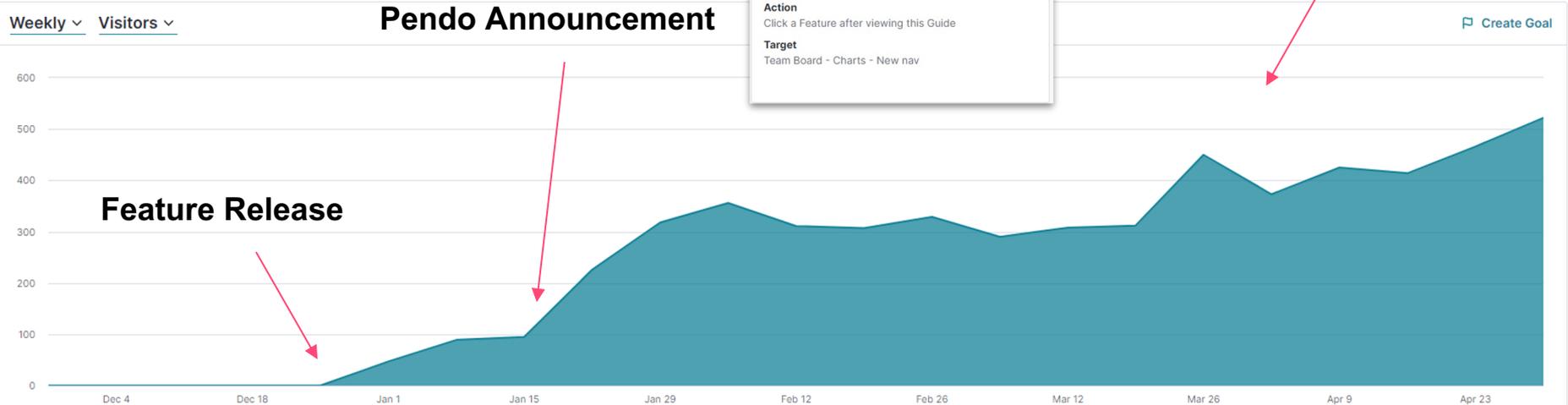
15.4% Adoption
19196 of 124371 visitors clicked

Team Board - Charts - New nav
after viewing this guide

Action
Click a Feature after viewing this Guide

Target
Team Board - Charts - New nav

**Product Announcements
Added to Resource Center**



Feature Release

Pendo Announcement

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Experiment 4 - Webinar Registrations

Targeted guide



Rally User Group

FLOW METRICS & ADVANCED ANALYTICS



Feb 28 2023, 1:00pm - 3:00pm ET
Guest Speaker: Dimitrios Psarros,
Technical Fellow, Software Engineering,
Carrier

Connect with your peers to discuss Flow Metrics and how to make best use of them to drive continuous improvement across your organization. It's your opportunity to learn and engage!

Discussion Agenda:

- Welcome, Purpose, Objective
- Rally Roadmap & Major Initiatives
- Topic (Flow Metrics)
- Short Retro and Wrap Up

[Close](#) [Register now!](#)

9,144 FIRST TIME VIEWS	19.0k TOTAL VIEWS	9,144 VISITORS	of 8,814 ELIGIBLE VISITORS	56s AVG TIME ON GUIDE	7s MEDIAN TIME ON GUIDE
Guide Elements <input type="checkbox"/> Show Deleted Elements <input checked="" type="checkbox"/> Group By Step					
Name	Element Type	Action	Number of Clicks	% of Clicks (Step)	
Step 1					
Close	Button	Dismiss Guide	2278	23.4%	
Register now!	Button	External URL	593	6.1%	
Close Button	Close Button	Dismiss Guide	6855	70.5%	

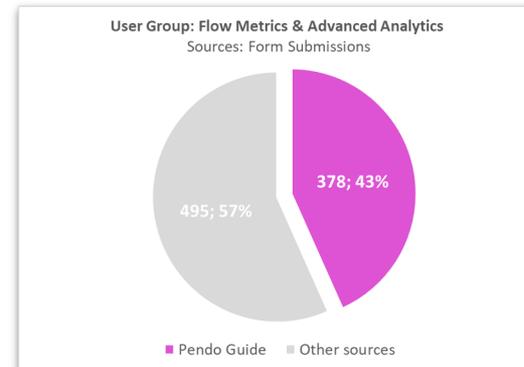
Segment

8814
ELIGIBLE VISITORS
(as of today)

Segment
Analytics multi-segment for NPS /w Flow Metrics

Rules Summary

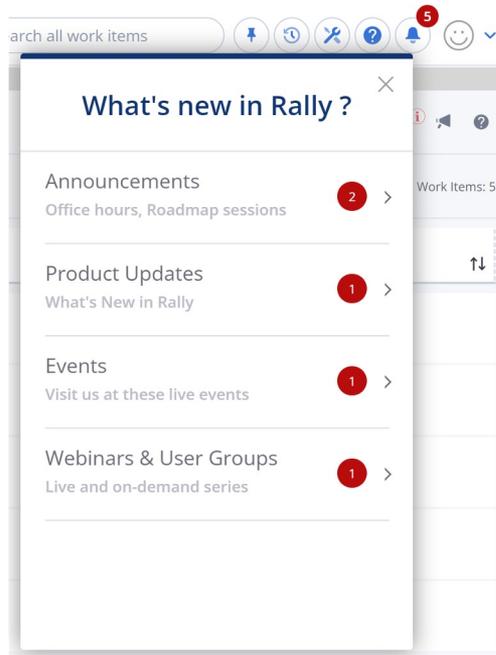
- Identified Visitors Only
- Segment equal to Analytics - Cycle Time



Experiment 4 Outcomes

Pendo Resource Center VS Targeted Guides

- Targeted guides had a **5 times** higher CTR
- **20-40% more** registrants from targeted guides



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[Register >](#)

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Experiment 4 - Additional Outcomes

Office Hours Signups



Rally Office Hours

Every Thursday, 12 PM - 1 PM ET

Please join us each week to ask your Rally-related questions and to share your business challenges with us. These 1-hour sessions serve as open office hours for you to join at your convenience to ask questions and discuss topics including:

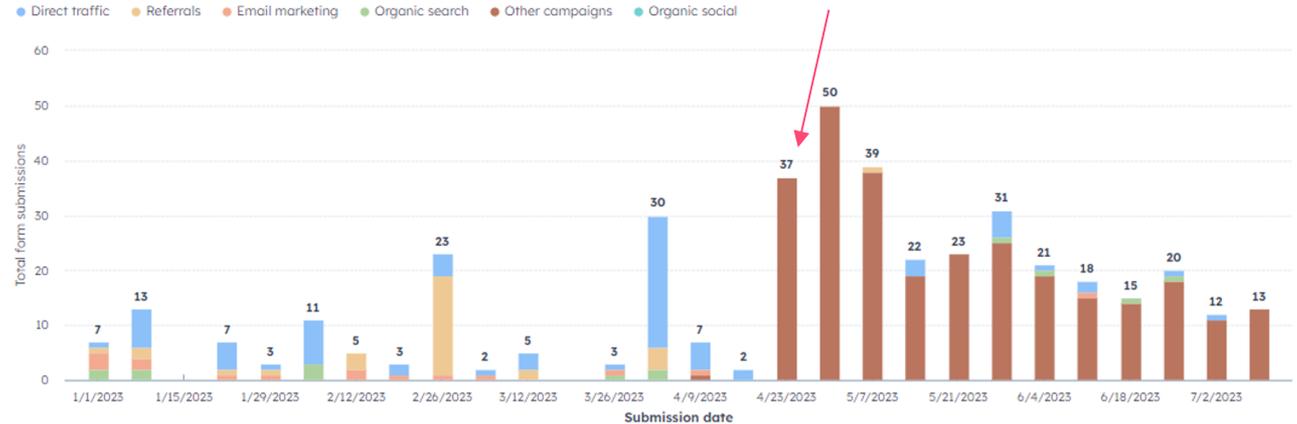
- General help, brainstorming, and advice with using Rally
- Assistance in configuring your Rally subscription
- Particular business problems you believe Rally can help solve
- Technical questions, integration questions, process and people questions, etc.

[Register >](#)

Total form submissions ▾

Office Hours Announcements Added to Resource Center

Style: Column ▾



Experiment 5

Walkthrough guides

- 10% of visitors clicked
- 60% got halfway through
- 35% actually finished



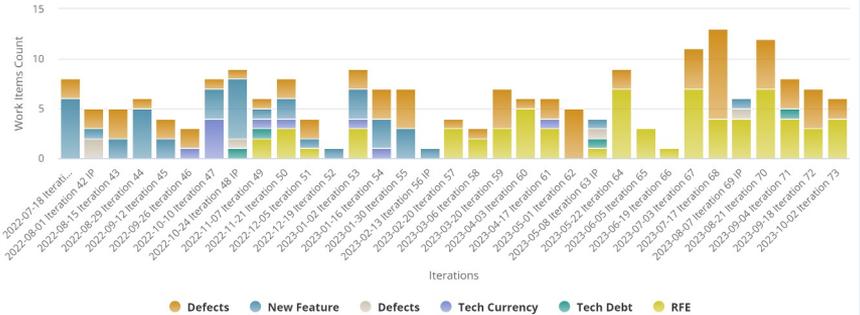
Team Board

Walk me through

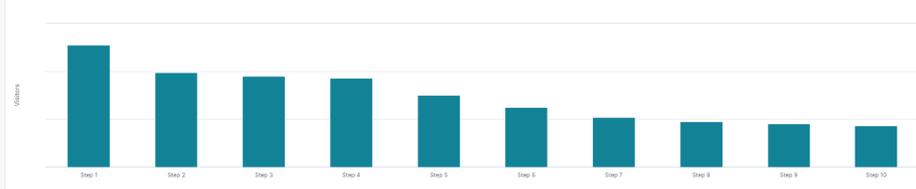
Cycle Time Cumulative Flow **Flow Metrics** Scatterplot / Histogram Charts Capacity Forecast Delivery

State Type: Schedule State Work Item Type: Defects (+1) Group By: Iterations Start State: In-Progress End State: Released Flow Distribution by: InvestmentCategory Units: Plan Estimate

Throughput



Visitors Per Guide Step

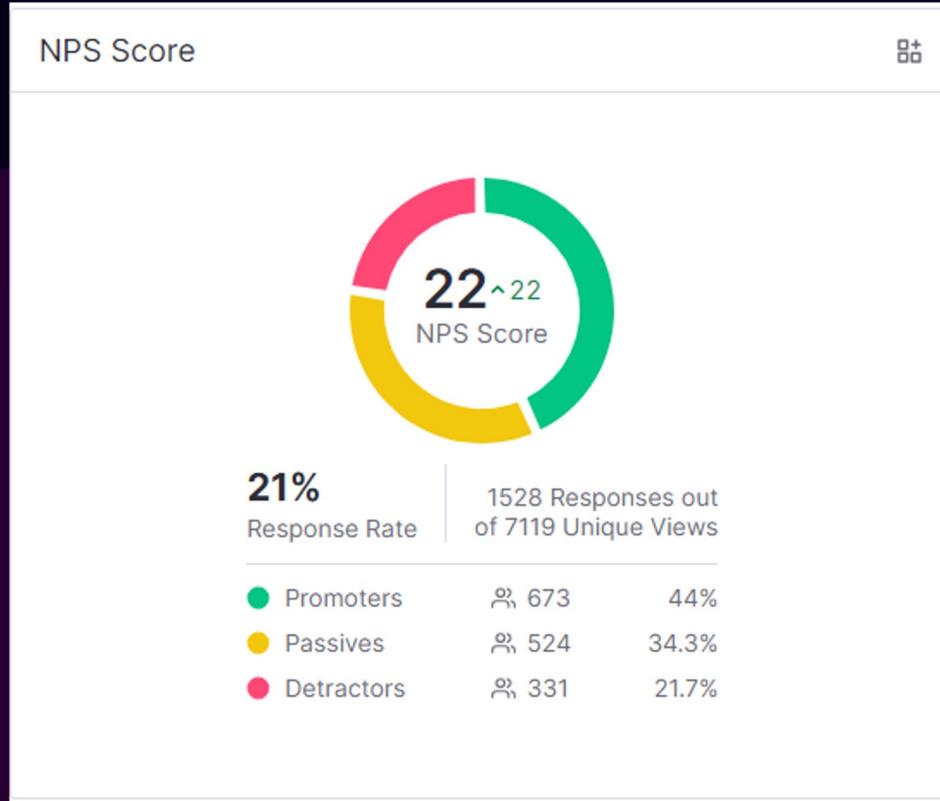




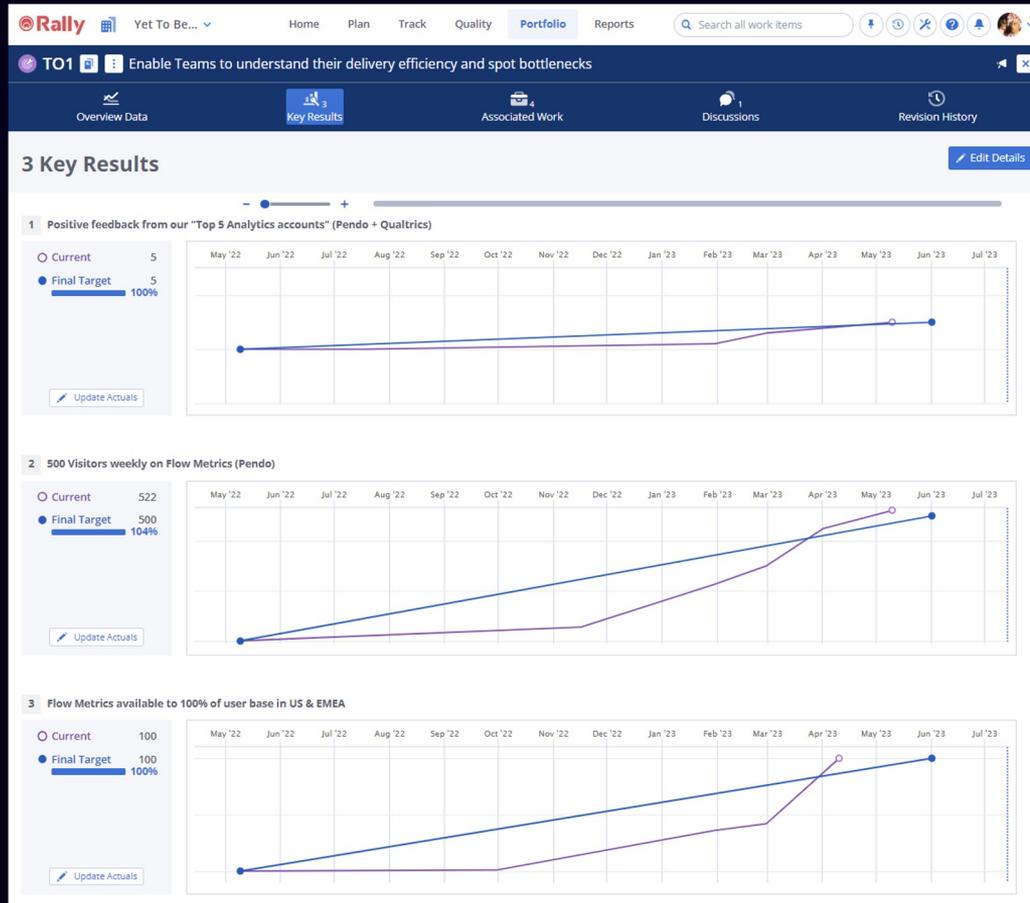
Connect back to value

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Net Promoter Score



Review Objectives



Business Outcomes

- Happier customers
- Increased adoption of new features
- Reduced usage of old/deprecated product areas
- Customer satisfaction and retention increased
- Higher engagement with customers

“Provides valuable insights into the software delivery metrics to drive and measure improvements in the process.”

“The reporting charts for team velocity, burn-down, and burn-up is helping our team to track progress and look ahead to improve”

Tips & Suggested Practices

Tips & Suggested Practices



- Ensure proper setup and integration with your product
- Define clear goals and objectives for using Pendo (Connect with OKRs)
- Train and empower teams to utilize Pendo effectively (Self-service for Marketing + UX)

More Tips & Suggested Practices



- Include tracking of NPS over time or in response to specific initiatives as part of business process to serve as a **tangible measure of the success or failure** in terms of their impact on customer sentiment
- Targeted guides = bigger impact than “all users”



Effective Product Management is about being data-driven and leveraging data at every step of a product lifecycle to make better business decisions



Thank you!

PENDOMONIUM 2023



PENDO MONIUM 2023