

PENDOMONIUM 2023

**A Pendo balancing act:
Delivering an extraordinary
experience without
creating a circus**





Liz Feller

Manager - Design System
& Analytics



Sarah Allard

In-App Help Administrator

Agenda

(the Act List)

How NBS uses Pendo to:

- Prioritize and improve our global digital experience
- Improve efficiency and productivity across teams
- Effectively manage change at scale

PENDOMONIUM 2023

Prioritize and improve our global digital experience



PENDOMONIUM 2023

Pendo Access Requests and Orientations



You're Hired!

Associate starts a ServiceNow ticket for Pendo access, which includes PingID authentication.

Access Request

Approval obtained from:

- Their leader
- Pendo admin
- Product manager

Orientation

Access complete after associate attends an internal orientation tailored to their role, product, access level, and use cases for Pendo.

Pendo Access Requests and Orientations



You're Hired!

Access Request

Orientation

Associate starts a ServiceNow ticket for Pendo access. Per the ticket, include the associate's name and auto

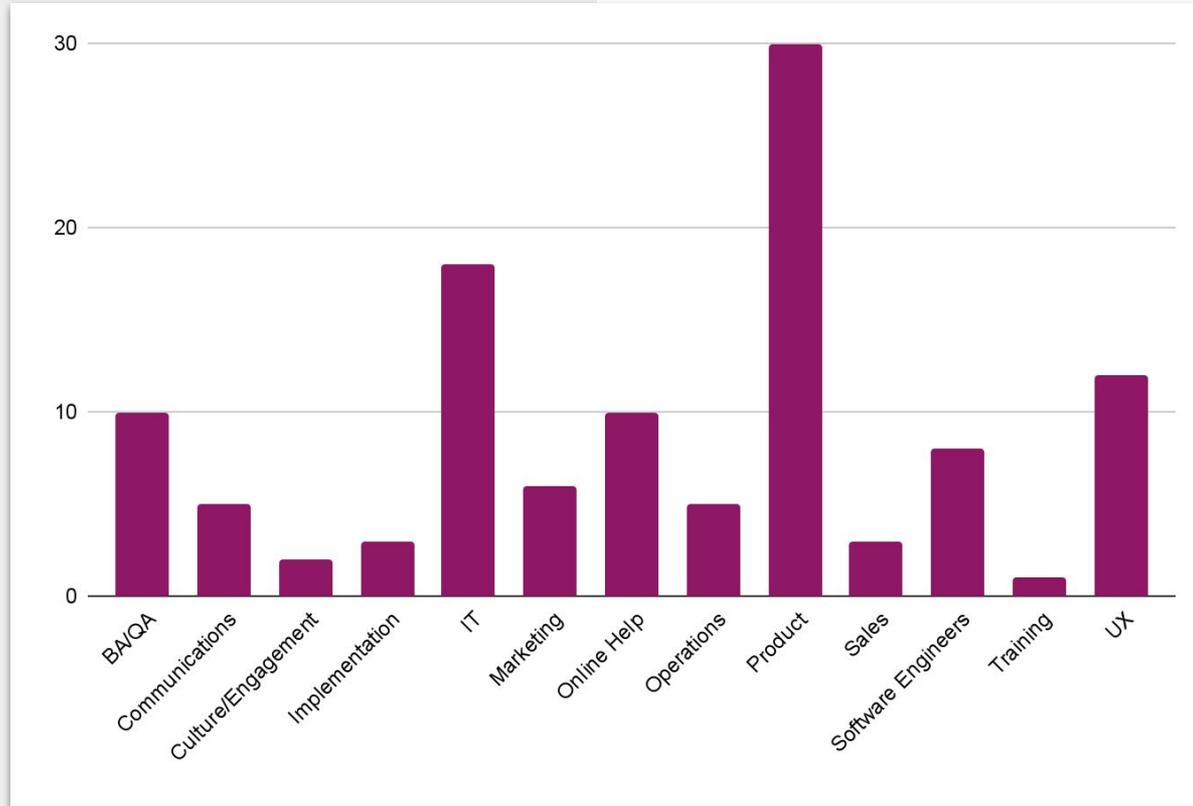
Approval obtained from:

- Their leader
- Admin manager

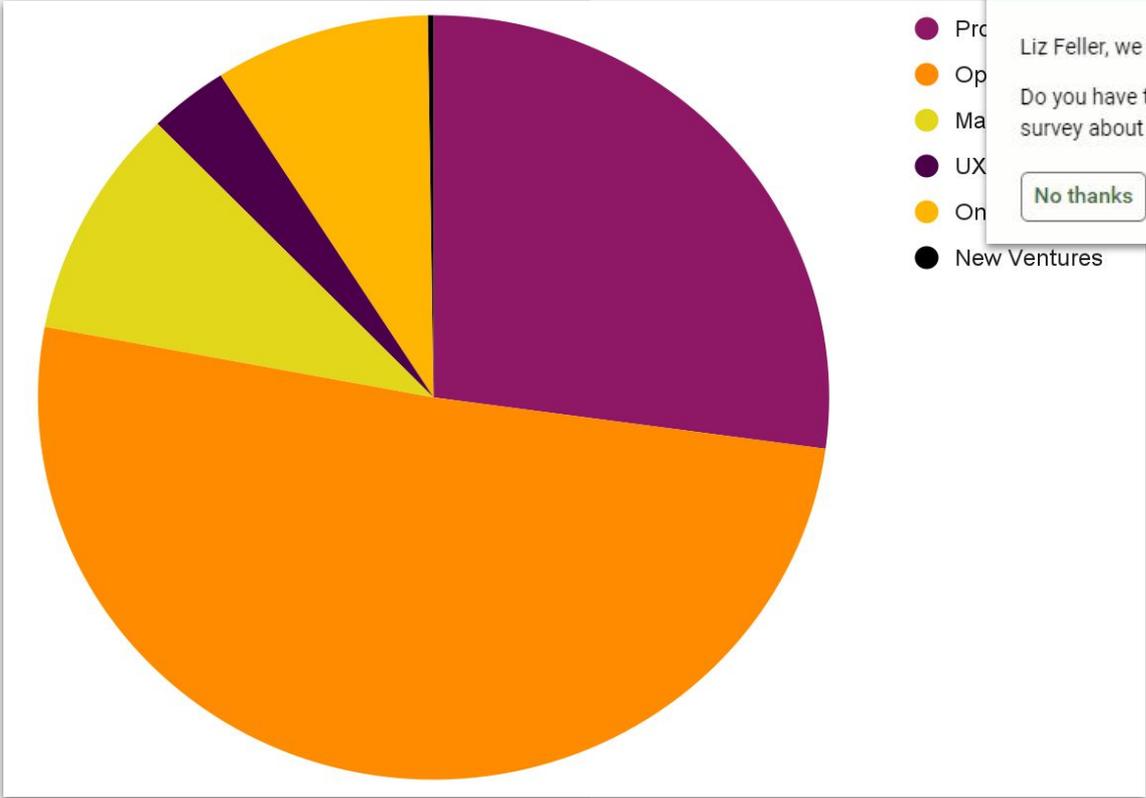
Access complete after associate attends an internal orientation tailored to their role, product, access level, and use cases for Pendo.

Welcome to NBS!
We're so glad you're here!

Pendo Access by Role in NBS



Pendo Guide Requests



Feedback ✕

Liz Feller, we want to hear from you!

Do you have three minutes to complete a survey about the LMS area?

No thanks

Take the survey

- Product
- Operations
- Marketing
- UX
- Onboarding
- New Ventures

Wait who requested that guide?



Post about a guide in Teams

Post a message to Microsoft Teams with a link to the selected item. To run this flow, select an item and choose this flow from the Flow menu.

Message *

Include intended audience, how it's activated/displayed, what it does (walkthrough/tooltip/etc), how to close, any Learn More links

Link to screenshot *

Click screenshot from List in a new tab then copy/paste the URL here

Post for FACTS SIS?

Post for Enterprise Payment Plans?

Post for Enterprise Grant & Aid?

Increase transparency about guides going live and where the request originated

Wait who requested that guide?



Post about a guide in Teams

Post a message to Microsoft Teams with a link to the selected item. To run this flow, select an item from the left-hand menu.

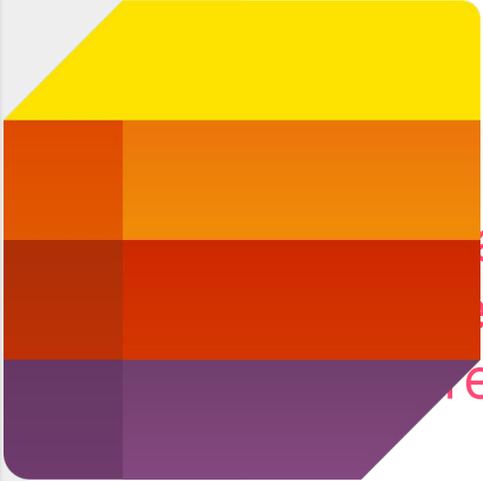
...e, any

...then

Post for FACTS SIS?

Post for Enterprise Payment Plans?

Post for Enterprise Grant & Aid?



Please transparency is going to be requested

Wait who requested that guide?



Allard, Sarah via Power Automate Wednesday 10:31 AM

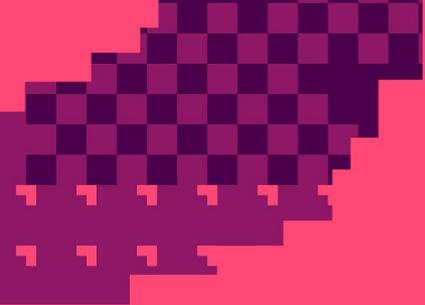
This guide is for [REDACTED]. It is set to display to all [REDACTED] users (internal, institution, and consumer). It is set to show on the Payment Plan Options screen and only display once for the user. The user may click the X to close the guide or "Got it!" Reach out with any questions.

Requested by: [REDACTED] (Customer Success Consultant - Sales)

[Link to screenshot](#)

[See less](#)

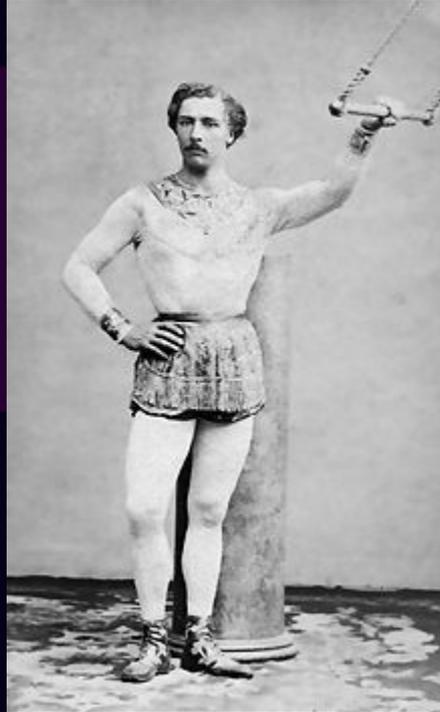
[↩ Reply](#)



our Ta-Da moments:

- **Make access easy**
 - **Increase associate knowledge**
 - **Improve guide request processes**
- 
- 

Improve efficiency and productivity across teams



Pendo acrobatics

Task (single 1-step guide)	Average Developer/Product (Time/\$)	Pendo (Time/\$)
Planning		
Reviewing		
Creating		
Testing, Packaging, Release		

Pendo acrobatics

Task (single 1-step guide)	Average Developer/Product (Time/\$)	Pendo (Time/\$)
Planning	45 min	–
Reviewing	45 min	10 min
Creating	60 min	20 min
Testing, Packaging, Release	60 min	20 min

Pendo acrobatics

Task (single 1-step guide)	Average Developer/Product (Time/\$)		Pendo (Time/\$)	
	Time	Cost	Time	Cost
Planning	45 min	\$34.27	–	\$0
Reviewing	45 min	\$34.27	10 min	\$4.13
Creating	60 min	\$45.70	20 min	\$8.26
Testing, Packaging, Release	60 min	\$45.70	20 min	\$8.26

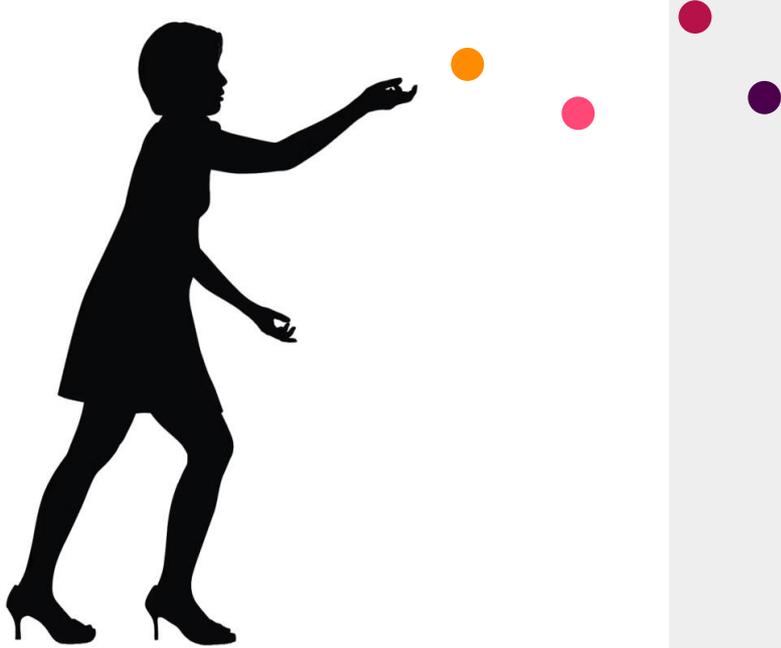
Pendo acrobatics

Metric	Result
Feature Engagement	42% more engagement compared to average
NPS by Market	K12: 58 (average: 50) HE: 50 (average: 45)

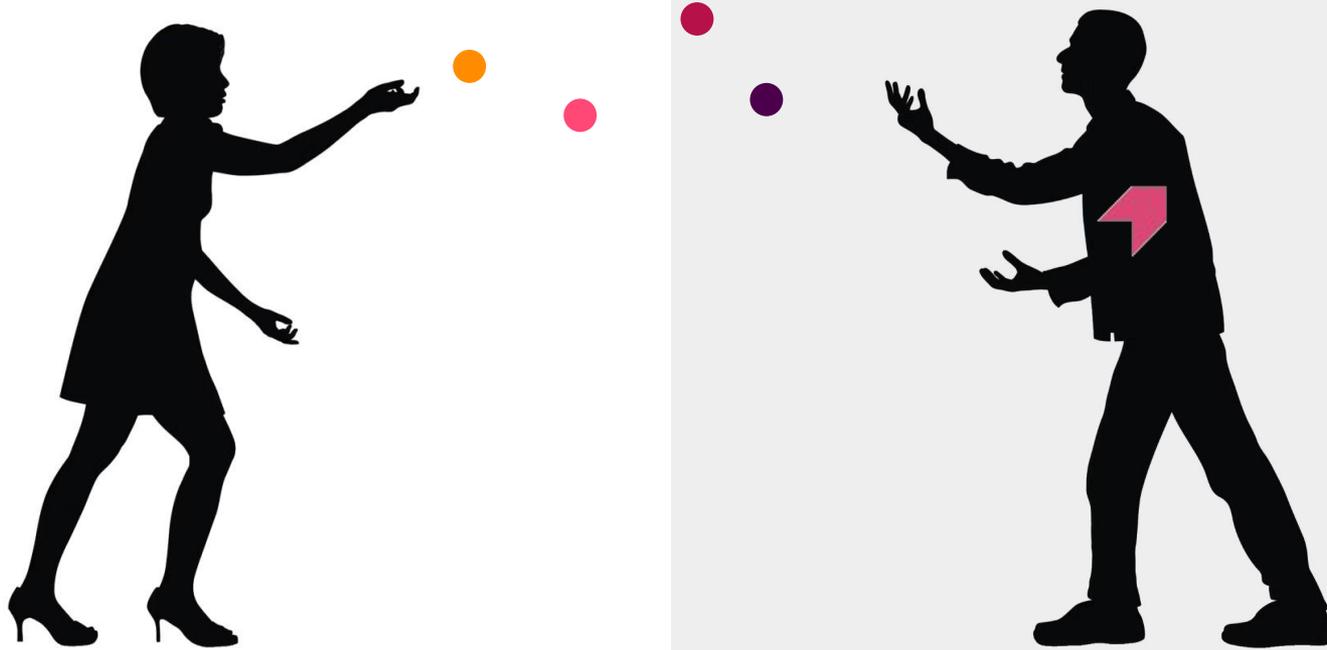
Pendo acrobatics

Metric	Result
Feature Engagement	42% more engagement compared to average
NPS by Market	K12: 16% higher HE: 11% higher

Juggling user changes



Juggling user changes



Visitor reports each Monday

Polls lead to quick-change action

 Feedback ×

Don't see your preferred method?
Tell us the other payment method(s)
you would like to use in the future.

- Apple Pay
- 529 Account
- Cryptocurrency
- PayPal
- Other

What do you prefer?

Enter text here...

Submit

Polls lead to quick-change action

 **Feedback** ×

Don't see your preferred method?
Tell us the other payment method(s)
you would like to use in the future.

Apple Pay
 529 Account
 Cryptocurrency
 PayPal
 Other

What do you prefer?

Submit



 My Profile  Customer Service

Premier Academy

 Signed in as Sarah 

Polls lead to quick-change action

 Feedback ×

Don't see your preferred method?
Tell us the other payment method(s)
you would like to use in the future.

Apple Pay
 529 Account
 Cryptocurrency
 PayPal
 Other

What do you prefer?

Enter text here...

 We'd like to hear from you! ×

What do you hope to find when you click the **Customer Service** link?

Enter text here...

Do you find the **Customer Service** link has the information you need?

5:1

Analytics taking center stage

Sign Up for Increased Profile Security ?

Sign up for Multi-factor Authentication to conveniently improve your profile security. Once you've signed up, you'll be required to log in and authenticate using a free authenticator app or email.

[What is multi-factor authentication?](#)

Recommended Free Authenticator Apps:

Select an app to download. App links will open in a new tab.



Google



Microsoft



Authy

Download Other

Sign Up Using App

Sign Up Using Email

Maybe Later

Analytics taking center stage

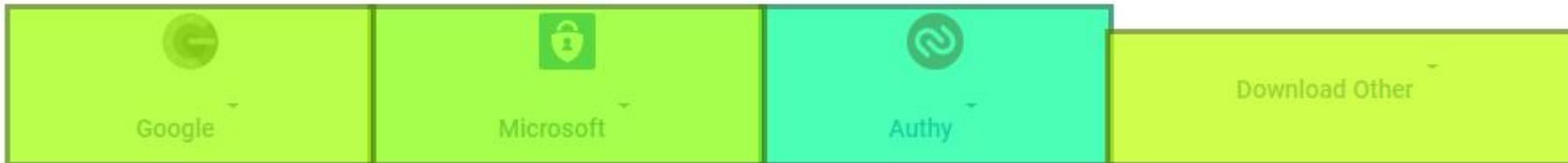
Sign Up for Increased Profile Security

Sign up for Multi-factor Authentication to conveniently improve your profile security. Once you've signed up, you'll be required to log in and authenticate using a free authenticator app or email.

[What is multi-factor authentication?](#)

Recommended Free Authenticator Apps:

Select an app to download. App links will open in a new tab.



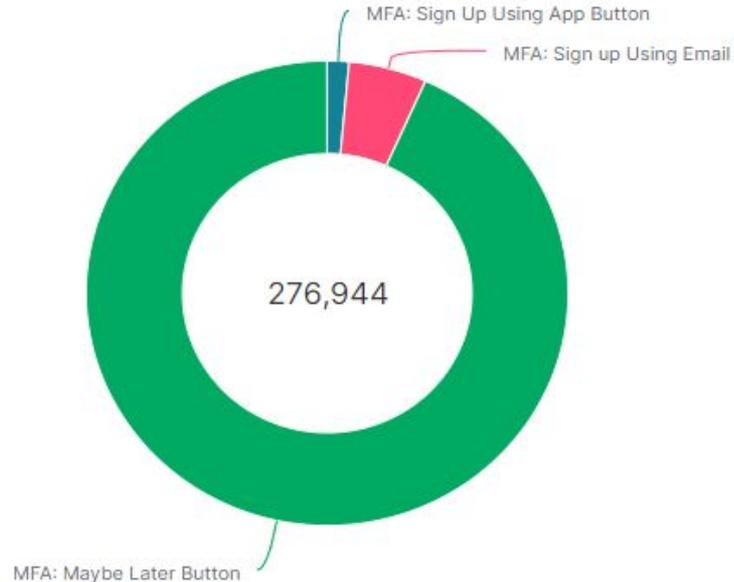
Sign Up Using App

Sign Up Using Email

Maybe Later

Analytics taking center stage

Total Feature Clicks



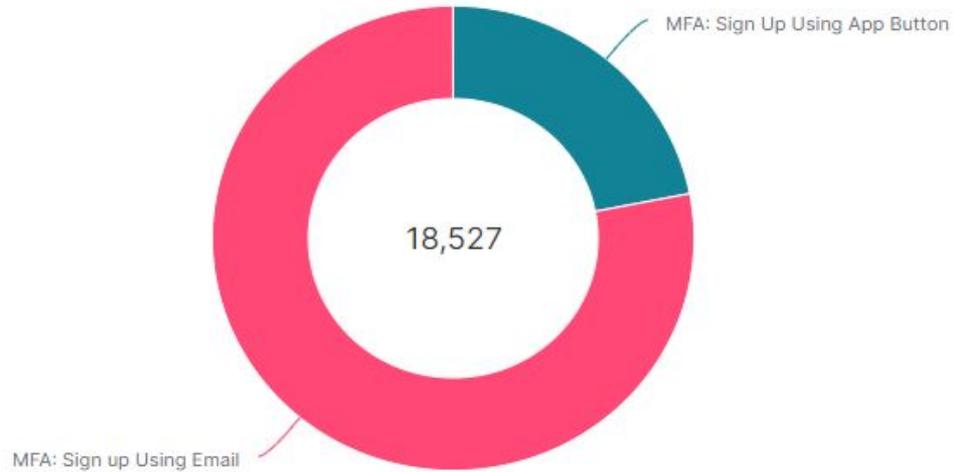
● MFA: Sign Up Using App Button

● MFA: Sign up Using Email

● MFA: Maybe Later Button

Analytics taking center stage

Total Feature Clicks



● MFA: Sign Up Using App Button

● MFA: Sign up Using Email

Help on help

Show me how to improve search results

Searching in
All results » FACTS SIS
About 1398 results

Students
https://www.nbshubhelp.com/FACTS_SIS/People_Management/Students/Add_a_Student
View and manage students

Add a Student
https://www.nbshubhelp.com/FACTS_SIS/People_Management/Students/Add_a_Student

How to improve your results:

- Type 2-3 keywords rather than a question.
- Add a + before the most important words.
Example: +agreement +transaction
- Add quotation marks to find an exact phrase.
Example: "student fees"

[What else can I do?](#)



Resource Center

System Status
Check site and product performance

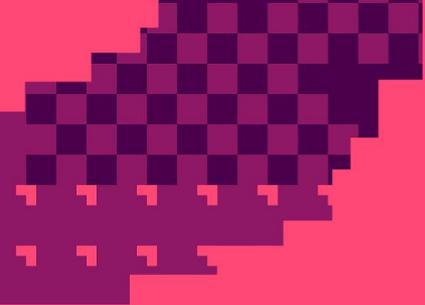
What's New **3**

Release Notes
Product updates and enhancements

Architecture of Philadelphia

HubHelp Learning





our Ta-Da moments:

- Pendo for product customization
 - Drive data-informed decisions
 - Use actionable insights
- 
- 

Effectively manage change at scale



PENDOMONIUM 2023

Managing account-specific impacts

 **New QuikPay Access** 

Within the next week, the URL to access QuikPay will be changing. Please be on the lookout for emails regarding next steps.

Got it!



Hello, your new temporary account manager is . FACTS SIS wants to make sure to provide you with support and the best-in-class customer service you are entitled to year-round. Moving forward, please contact   with any questions or concerns you may have.

FACTS SIS Temporary AM: 

Email: 

Phone: 

Got it!

Demo Environment

Please note that the data and photos used in our presentations is not of known actual persons nor comprised of any datasets of known actual persons. It is mock data used exclusively for demonstrative purposes.



Behind the curtain: for NBS eyes only



 **Internal NBS Warning** 

There is a pending case of alleged fraud associated with owners of this school.

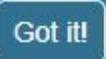
Please consult a lead before making changes to financial or security related information.





REMINDER

As a **self-service school**,  students should not be referred to call Nelnet Customer Service for any reason regarding payment plans, only Refunds questions.



Institution

Behind the curtain: for NBS eyes only



Support Admin

Premier A/E Standalone Middle School 2022-2023 | Q1 SF

☰

When testing the Mobile API in Postman please note: ✕

If using ProductAttributesCombinationSKU, anything you send in ProductAttributes won't be considered since the combination SKU will point to a specific set of product attributes.

Return to Admin Dashboard

product list

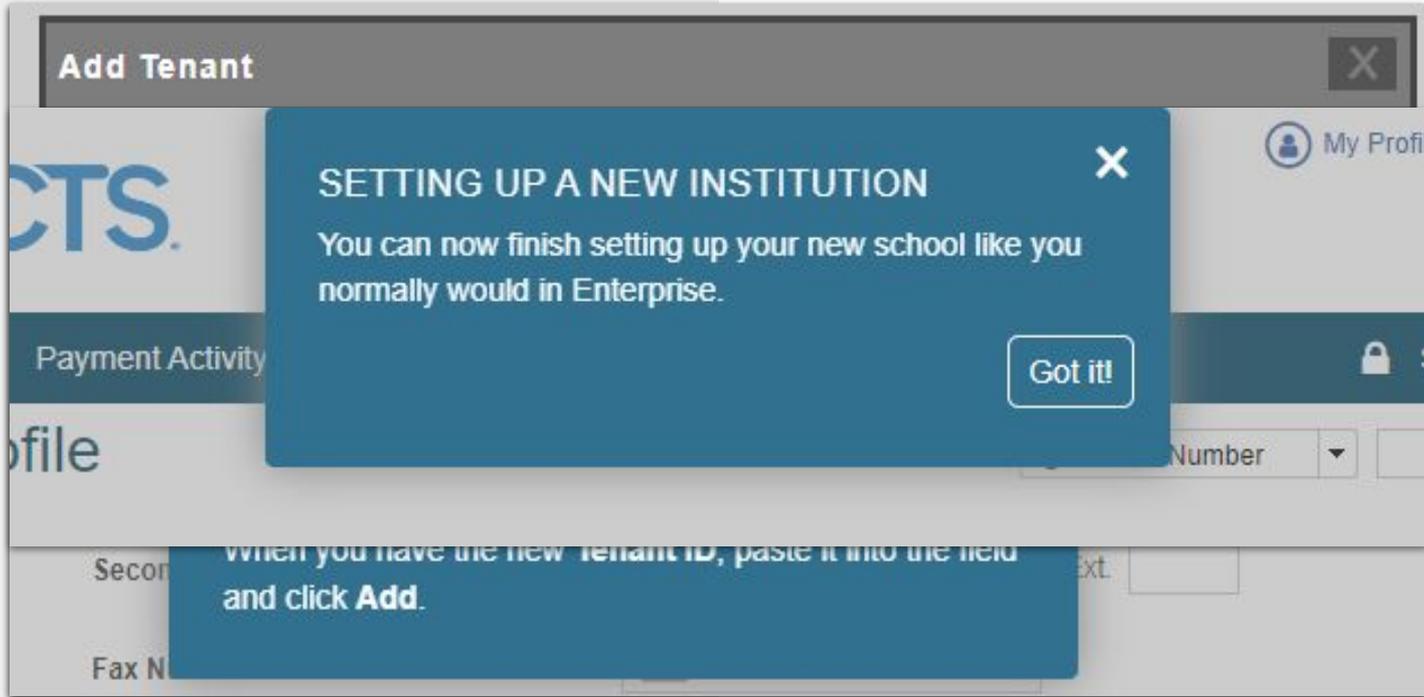
Save Save and Continue Edit

Advanced **Settings** Mobile API/Postman Info

i Product info

\$ Price

Behind the curtain: for NBS eyes only



Behind the curtain: for NBS eyes only

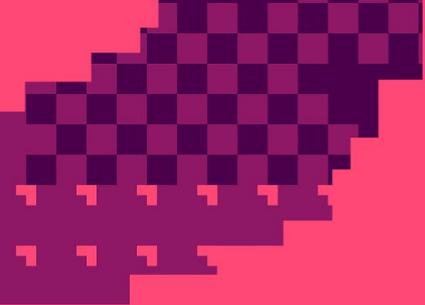


IT HAPPENED!

The Online Help and Communication team is excited to announce that Pendo is officially installed in HubHelp, and this is our first announcement special for our NBS Associates!

Be on the lookout for more content coming for you as well as our customers!

Woohoo!



our Ta-Da moments:

- In-app is in-the-moment
 - Think of all your users
- 
- 

Pendo acrobatics: the encore

Task (single 1-step guide)	Average Developer/Product (Time/\$)		Pendo (Time/\$)	
	Time	Cost	Time	Cost
Planning	45 min	\$34.27	–	\$0
Reviewing	45 min	\$34.27	10 min	\$4.13
Creating	60 min	\$45.70	20 min	\$8.26
Testing, Packaging, Release	60 min	\$45.70	20 min	\$8.26

Pendo acrobatics: the encore

Task (single 1-step guide)	Average Developer/Product (Time/\$)		Pendo (Time/\$)	
	Time	Cost	Time	Cost
Planning	45 min	\$34.27	–	\$0
Reviewing	45 min	\$34.27	10 min	\$4.13
Creating	60 min	\$45.70	20 min	\$8.26
Testing, Packaging, Release	60 min	\$45.70	20 min	\$8.26
All institution-specific guide steps	983.5 hrs	\$44,945.95	234.17 hrs	\$5,807.42

87% savings having an In-App Help Admin

Pendo acrobatics: the encore

Task (single 1-step guide)	Average Developer/Product (Time/\$)		Pendo (Time/\$)	
	Time	Cost	Time	Cost
Planning	45 min	\$34.27	–	\$0
Reviewing	45 min	\$34.27	10 min	\$4.13
Creating	60 min	\$45.70	20 min	\$8.26
Testing, Packaging, Release	60 min	\$45.70	20 min	\$8.26
All institution-specific guide steps	983.5 hrs	\$44,945.95	234.17 hrs	\$5,807.42

**87% savings having an In-App Help Admin
across 15+ products & services**

What's the next act?



PENDOMONIUM 2023



The After Show: Ask Us Anything



Thank you!

PENDOMONIUM 2023



PENDO MONIUM 2023