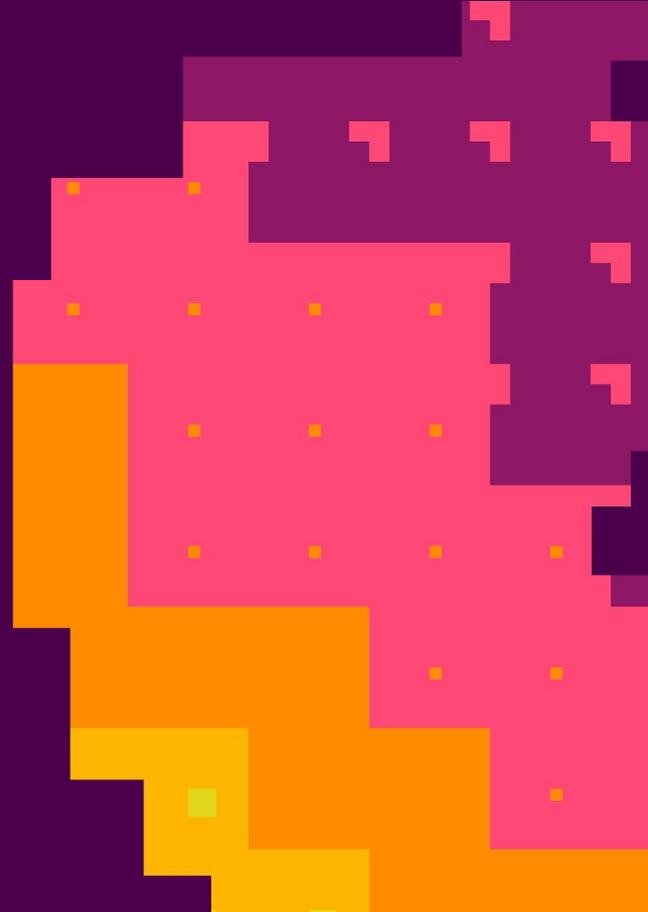


**PENDOMONIUM 2023**

# Inspiration to innovation

**Why PMs are the key to AI success**





# Dr. Inbal Budowski-Tal

Sr. Director of ML, Pendo

# Agenda

## TIPS AND TRICKS



- Pendo's AI journey
- Levels of AI
- What is the PM's role in ensuring the success of AI features?

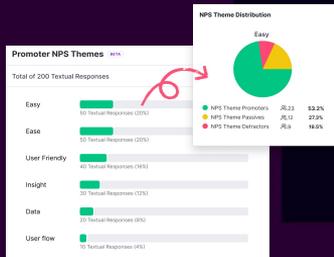
# Pendo's AI Journey



Pendo ML team established

Built ML muscle and infrastructure

NPS Insights



AI boom  
Pendo AI Hackathon

Pendo AI

- NPS insights and summaries
- Feedback summaries
- Guides creator assistant
- Journey insights
- AI chatbot
- AI tagging assistant

Gearing up Pendo AI

What now?

PNDM 2021

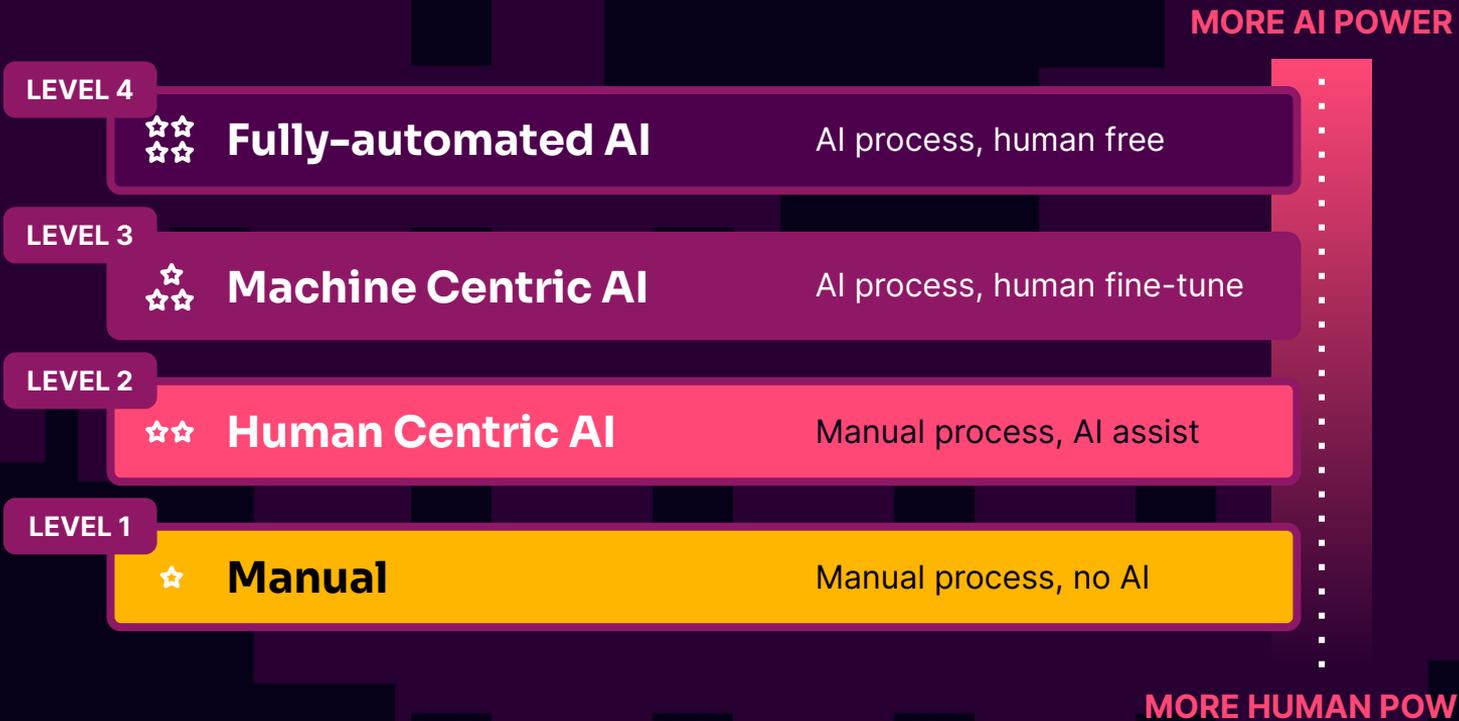
PNDM 2022

PNDM 2023

PNDM 2024

PENDOMONIUM 2023

# Levels of AI





# Pendo's AI features in the lens of the 4 levels of AI



# AI-powered product discovery

## NPS insights

Eliminate hours of analysis and get to insights immediately with AI.



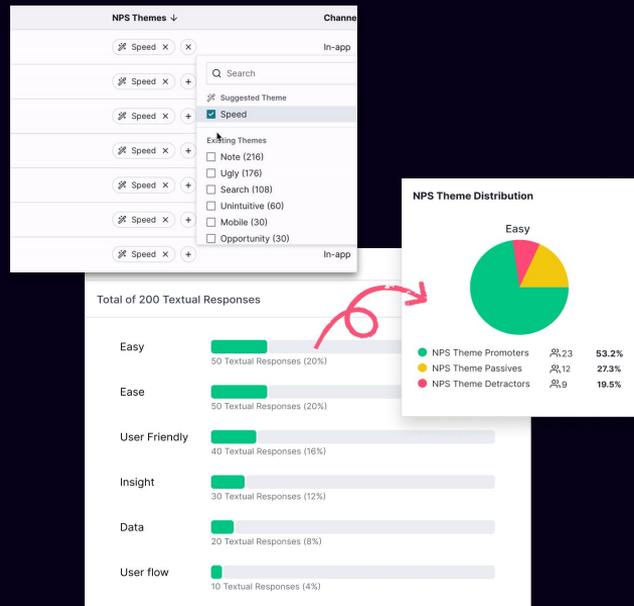
**AI LEVEL 2**

## Feedback insights

AI-powered recommendations for what feature to build next based on the voice of customers.



**AI LEVEL 2**



# Guides creator assistant

Jump start guide creation by auto-generated guides powered by LLMs.



AI LEVEL 2



AI LEVEL 2

# AI tagging assistant

Reduce the need for technical knowledge when getting started with Pendo.

## Tag Quality



This is a medium quality tag.

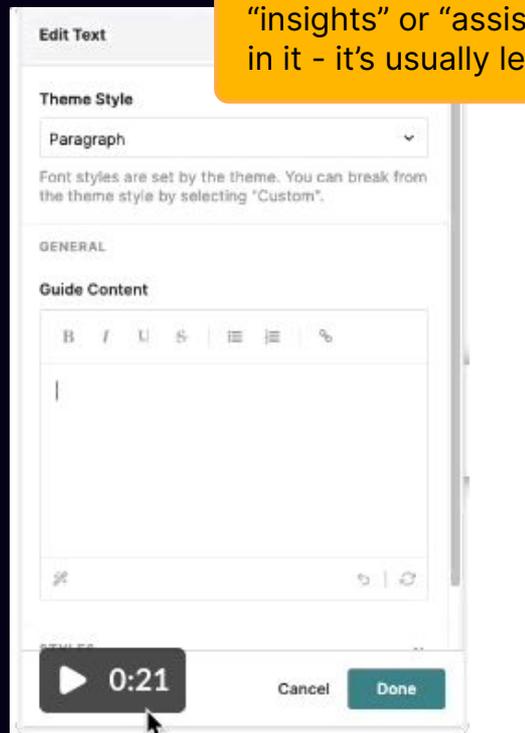
### VIEW CRITERIA ^

- ✔ No Duplicates
- ✔ Collecting Data
- ⚠ Weak rule strength

## TIPS AND TRICKS



If the feature name has “insights” or “assistant” in it - it’s usually level 2



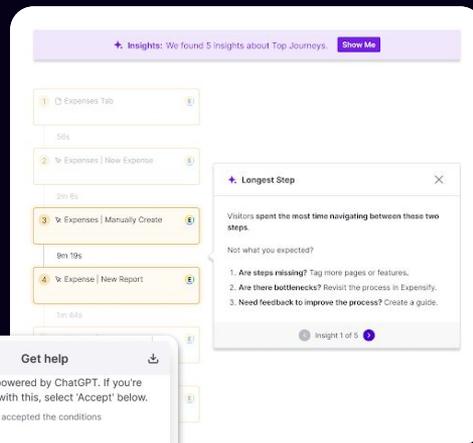


# Journey insights

Uncover inefficiencies to complete a task or business process to automatically spot in-app guiding opportunities.



AI LEVEL 2

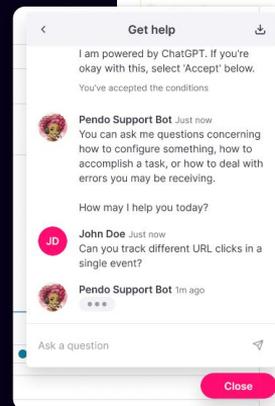


# AI chatbot

AI-powered personalized support and knowledge in-app creates a better customer experience.



AI LEVEL 2



# Pendo's AI Journey



Pendo ML team established

PNDM 2021

Built ML muscle and infrastructure

PNDM 2022

AI boom  Pendo AI Hackathon

PNDM 2023

☆☆  
AI LEVEL 2

Pendo AI

- NPS insights and summaries
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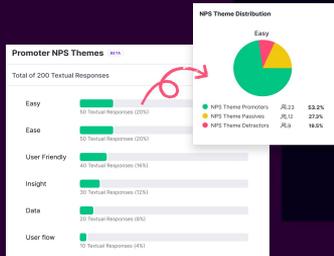
☆☆☆  
AI LEVEL 3

What now?

Gearing up Pendo AI

PNDM 2024

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NPS Insights



# What is the PM's role in ensuring the success of AI features?

Lessons learned from Pendo's AI journey



LESSON NO.1

**“What can we do with AI?”**

VS.

**“What do our customers need?”**

# NPS Insights Evolution

## What we can do - POC

Rating	Response Group	Response	NPS Themes	Channel
10	Promoter	Long time fan	API	In-app
10	Promoter	very intuitive, easy to pick up for new users, and the data... <a href="#">See more</a>	Analytics Intuitive	In-app
10	Promoter	usability	UI UX	In-app
10	Promoter	It's easy without sacrificing capabilities. And bug fixes a... <a href="#">See more</a>	Easy	In-app
10	Promoter	I was the Main point person for our company to find an anal... <a href="#">See more</a>	API	Email
10	Promoter	Pendo platform allows products teams to access user behavio... <a href="#">See more</a>	Analytics	In-app
10	Promoter	It is very powerful tool for POs and projects.	Powerful	Email
10	Promoter	Intuitive UI, features choice. Quick to learn.	Intuitive UI UX	In-app
10	Promoter	Pendo is better at reaching its customers than other intern... <a href="#">See more</a>		
10	Promoter	Pendo is an incredible tool that not only allows us to trac... <a href="#">See more</a>		

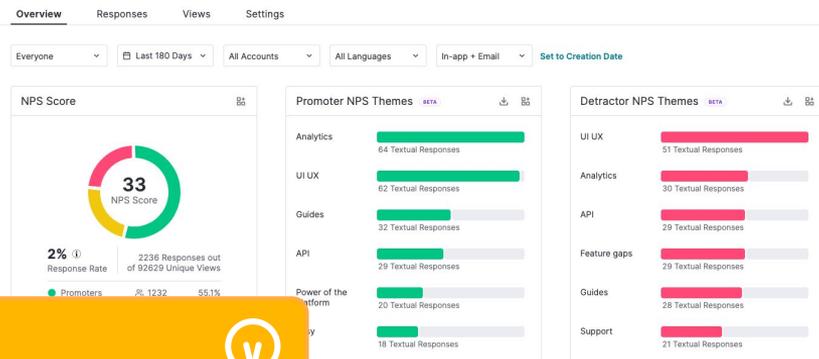
### TIPS AND TRICKS



Design an AI experience that takes into consideration users' input, for two reasons:

1. Give the user control to override the AI
2. Improve the AI engine by a feedback loop

## What our customers need



The image features a decorative graphic consisting of a grid of colored squares in shades of orange, pink, and purple, arranged in a pattern that tapers towards the top-left and bottom-right corners. The central text is bold and black, set against a white background.

**The PM is critical in turning  
the POC into a  
full user experience**



LESSON NO.2

# Moving from level 2 to level 3

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# A pendo story



## Usage data:

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- Page clicks
- Feature clicks
- Track events
- Metadata

## Business outcomes:

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- Churn / retention
- Conversion
- Expansion in MAU
- Upsell

**Can we connect the dots?**

# Our initial UX – Retention Insights



Engage

☆☆

## Retention Insights

AI LEVEL 2

All Apps

All Product Areas All Event Types All Insight Categories

Top Events that Indicate High Account Retention (10)

Event	App	Product Area	Accounts interacted with the event are	Adoption
<a href="#">Data Mappings   Promote Metadata</a>	Pendo Engage (Insights & G...	Data Mappings	Much more likely to stay active	5.47%
<a href="#">NPS   NPS Insights   NPS Themes Filter</a>	Pendo Engage (Insights & G...	NPS Insights	Much more likely to stay active	4.09%
<a href="#">NPS   NPS Insights   Promoter NPS Themes char</a>	Pendo Engage (Insights & G...	NPS Insights	Much more likely to stay active	5.28%
<a href="#">NPS   Responses   Add Theme To Response</a>	Pendo Engage (Insights & G...	NPS	Much more likely to stay active	7.67%
<a href="#">NPS Insights   All NPS Insight usage indications</a>	Pendo Engage (Insights & G...	NPS Insights	Much more likely to stay active	5.57%
<a href="#">Request Details   Merge   Confirm Merge Button</a>	Feedback	Requests	Much more likely to stay active	7.39%



# Design partners **loved** the insights

But asked us - what actions do we recommend?



# Retention Insights Take II

# Outcomes



# Outcomes



Something about the Outcomes here. [Learn More >](#)

Create a new Outcome

Overview Objectives Recommendations

**Recommended Action**

**Increase retention**

Audience focus:  
Enterprise accounts on Acme.co

Campaign outcome:  
AcmeExplorer usage by +15%

Why:  
AcmeExplorer users are your most highly retained of all.

Snooze

Create campaign

**Recommended Action**

**Accelerate onboarding**

Audience focus:  
Commercial accounts on Acme.co

Replay outcome:  
Verify 3 friction points found

Why:  
Commercial onboarding is 12% slower, on average.

Snooze

Review replays

**Recommended Action**

**Increase conversion**

Audience focus:  
First 30 days visitors on Acme.co

Guide outcome:  
View Plan Comparisons Page

Why:  
This appears to be a major "Aha!" moment for Free users who convert.

Snooze

Create guide

**Recommended Action**

**Decrease churn**

Audience focus:  
Enterprise accounts on Acme.co

Campaign outcome:  
Increase MRR +3%

Why:  
Month-over-month MRR on this tier is dropping below average.

Snooze

Create campaign

**Recommended Action**

**Increase conversion**

Audience focus:  
Commercial accounts on Acme.co

Guide outcome:  
Increase tag usage by +20%

Why:  
Accounts who complete this action show a +12% likelihood to upgrade.

Snooze

Create guide

**Recommended Action**

**Accelerate onboarding**

Audience focus:  
First 30 days visitors on Acme.co

Campaign outcome:  
-3 avg onboarding days

Why:  
Users who onboard faster than your average retain 1.7x longer.

Snooze

Create campaign

## Outcome Goal

# Increase Retention

1. **Identify** the features
2. **Target** the audience
3. **Generate** a campaign

**Track results -**  
before and after metrics



Overview Objectives Recommendations

### Recommended Action

Increase retention

Audience focus:  
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 Snooze

 Create campaign

### Recommended Action

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Audience focus:  
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### Recommendation

Accelerate onboard

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Commercial acco

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Verify 3 friction p

Why:  
Commercial onb  
slower, on avera

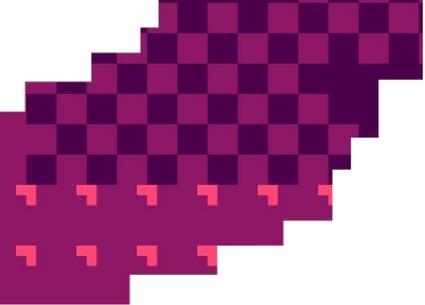


 Rev

### Recommendation

Increase conversio

Audience focus:  
Commercial acco



# Moving from AI level 2 to 3 is a Product matter

**TIPS AND TRICKS**



Start with Level 2



**LESSON NO.3**

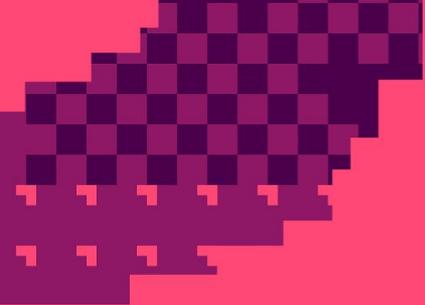
# **Innovation mindset**

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Have you ever heard this sentence?





# Make some room for Innovation

## TIPS AND TRICKS



- Create a balanced roadmap:
- POCs vs. delivery work
  - Low vs. high risk projects

# Avoid moonshots

Have a big vision ...  
... but start lean.



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**Teamwork  
makes the  
dream work**

**Designer**

**Product  
Manager**

**Data Scientist**

**Engineer**





# What is the PM's role in ensuring the success of AI features?



# The PM is key to the success of AI features

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1. From POC to a full product experience

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2. Taking the product from level 2 to level 3

---

3. Fostering an innovation mindset

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**Thank you!**

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**PENDO  
MONIUM  
2023**