

PENDOMONIUM 2023

Quick BIG wins with *basic Pendo* features





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Management



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Product Manager



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Senior Product Manager



How we

Pendo at

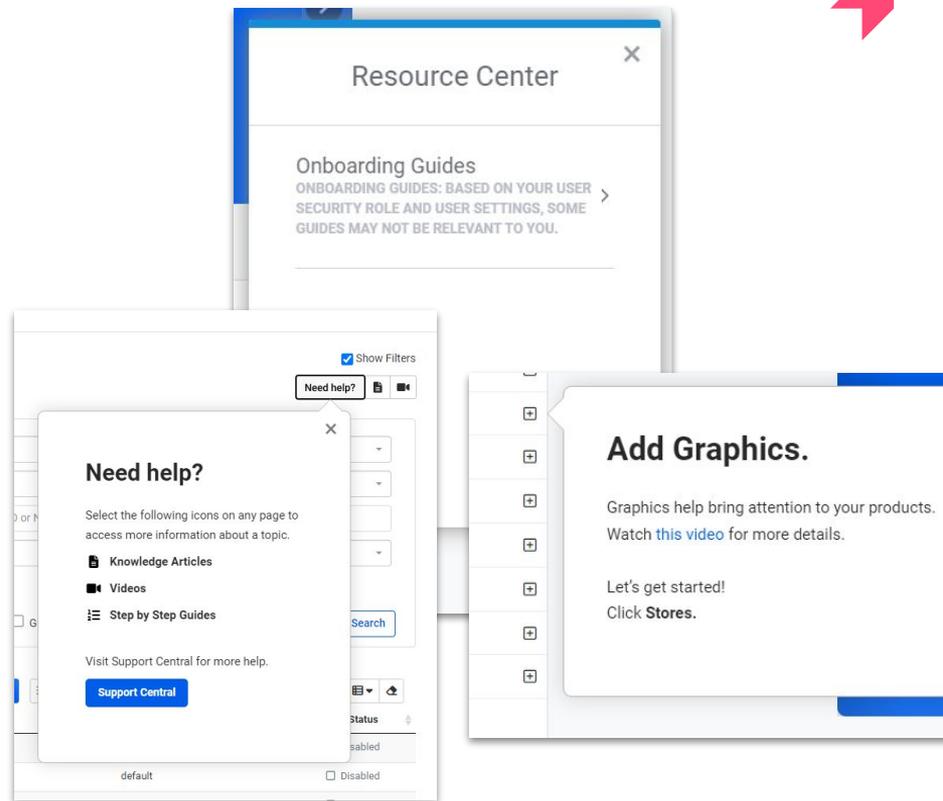
MY
SCHOOL
BUCKS

Remind me Later

Learn More >

How we Pendo

- Self-help Resources



PENDOMONIUM 2023

How we Pendo

- Self-help Resources
- Polling



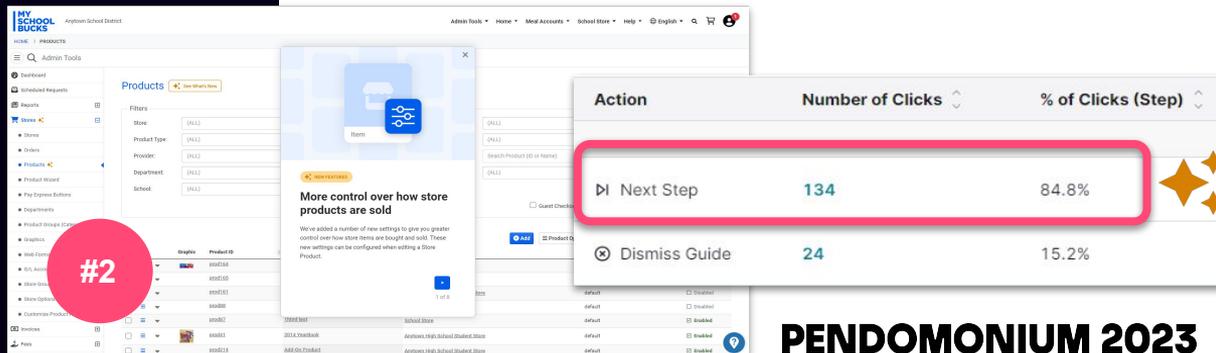
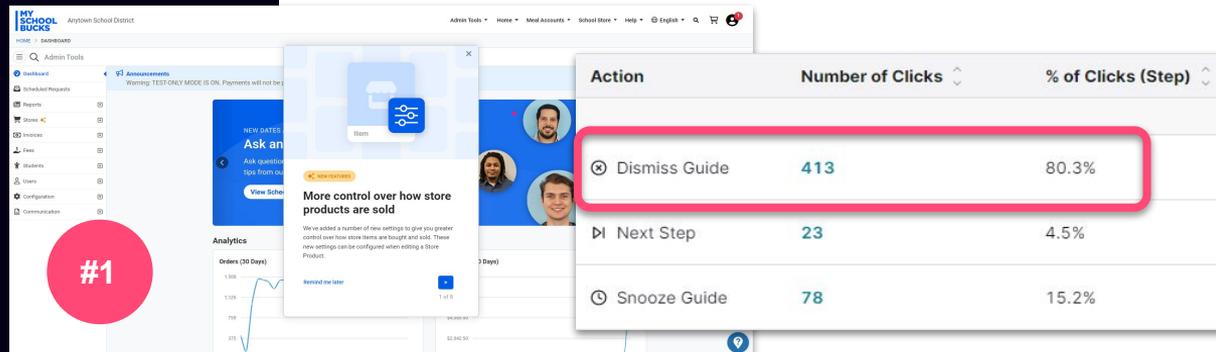
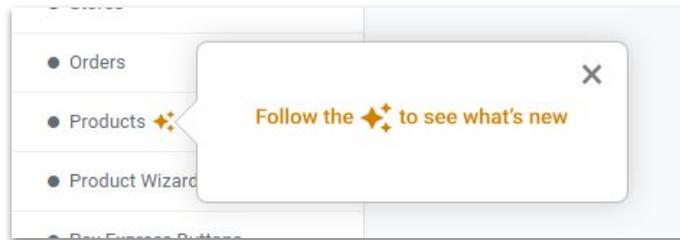
A screenshot of a 'SHARE FEEDBACK' modal form. The modal has a close button (X) in the top right corner. It features a blue speech bubble icon followed by the text 'SHARE FEEDBACK'. Below this, there are two questions, each followed by a text input field:

- Question: "What is your role?"
Input field placeholder: "Tell us more to help improve your experience"
- Question: "What do you want to accomplish today?"
Input field placeholder: "Tell us more to help improve your experience"

At the bottom of the modal, there are two buttons: a blue "Submit" button and a white "Remind me Later" button with a grey border.

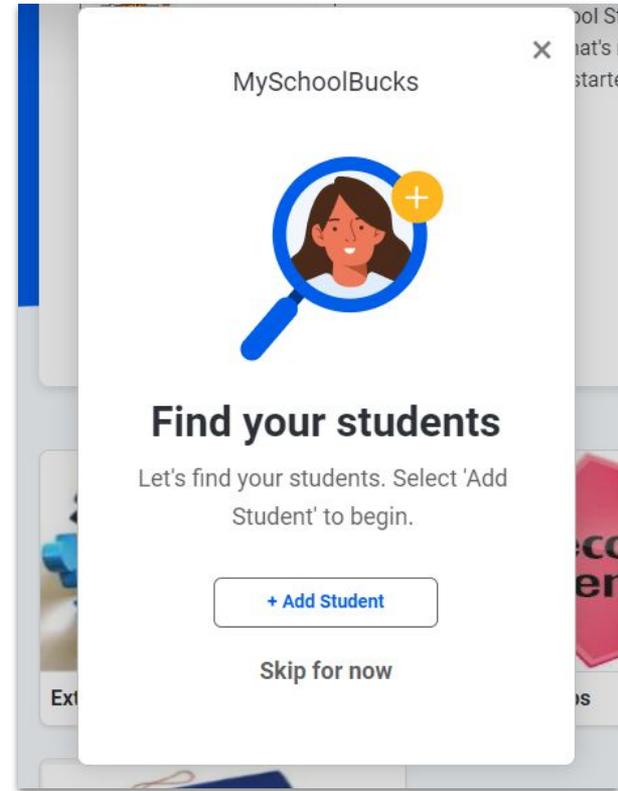
How we Pendo

- Self-help Resources
- Polling
- New feature Stars



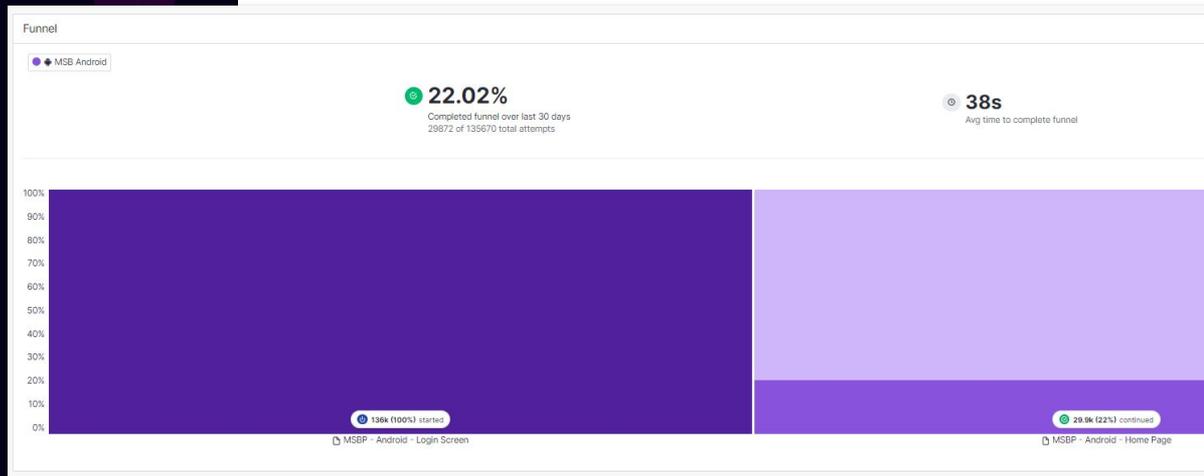
How we Pendo

- Self-help Resources
- Polling
- New feature Stars
- Bridging the User Experience



How we Pendo

- Self-help Resources
- Polling
- New feature Stars
- Bridging the User Experience
- Analytics & Metrics



Agenda

- **Problem 1:** Low app store ratings
- **Problem 2:** Low account sign-up rate
- **Our Learnings & Key Takeaways**



P1: Low App Store Ratings

Low App Store Ratings Story



App Store Preview

This app is available only on the App Store for iPhone.

MSB Parent, USA 4+

Heartland Payment Systems, Inc.

#44 in Education

★ ★ ★ ★ 1.8 • 1.9K Ratings

Free

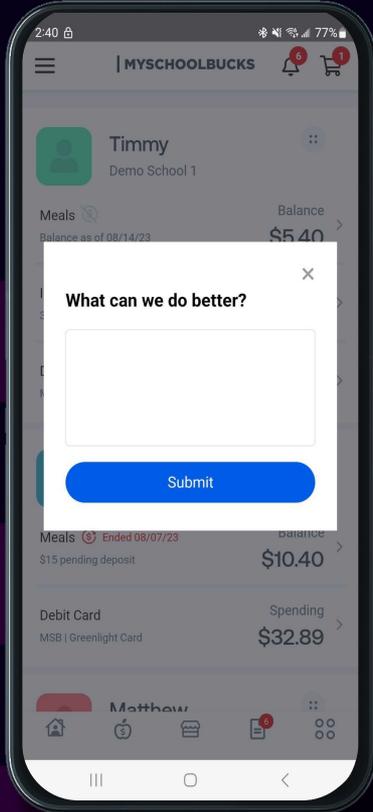
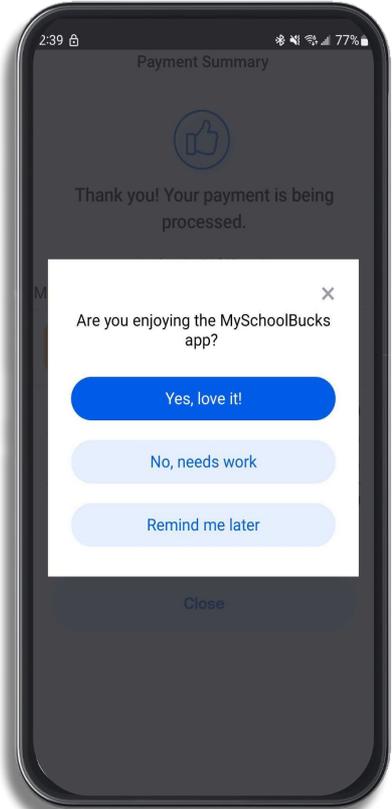
iPhone Screenshots

School Payments Made Easy

From the classroom to the cafeteria, pay online anytime

Browse your school's store
Available at select schools

How we used Pendo



Challenges

- Successful action
- Timing
- Versioning
- Keeping it up to date



Edit Segment

i This segment is currently used by Guides, Reports, and/or other Segments. [View where this is used](#)

Settings

Name
MSBP - Ratings Sample Group

Visibility
Everyone Only Me

Select Visitor Data
 Identified Visitors Only
 Anonymous Visitors Only
 All Visitors

Eligible Visitors ⓘ
-- ↻

Guide Eligible
Yes

Sample Group ▾ less or equal to ▾ 99

OR

AND

AppVersion ▾ contains ▾ 12.7

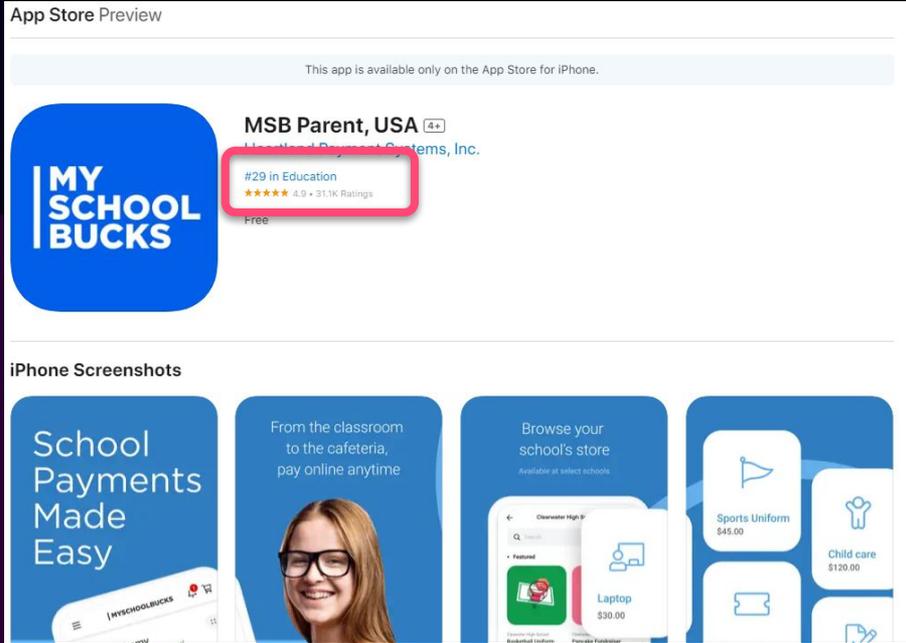
OR

AppVersion ▾ contains ▾ 12.6

OR

+ AND

Outcome



Quick BIG wins

- Rating: 1.7 → 4.9 in two weeks
- 40% Response Rate
- Valuable Feedback
- Quick turnaround on app updates & responses
- Our Reputation



P2: Low Account Signup Rates

Low Account Signup Story



- Challenges measuring signups
- Complex workflow
- Missed marketing opportunities



MY SCHOOL BUCKS

HOME > SIGN UP

Sign Up

Search for your district by state or province

Select State/Province

Cancel Create Account

Heartland
A Global Payments Company

Contact Us Home

MY SCHOOL BUCKS

HOME > SIGN UP

Sign Up

Search for your district by state or province

Arizona

OneDistrict

Troy

Jones

Mobile Phone Number

Enter your mobile phone number and check the Allow MySchoolBucks to send me text alerts at my request box to receive important account information (e.g. password reset) via text message.

(484) 557-1739

Terms of Service | Privacy Notice

MY SCHOOL BUCKS

reset) via text message.

(484) 557-1739

Terms of Service | Privacy Notice

litroyj+Pendo@gmail.com

litroyj+Pendo@gmail.com

litroyj+Pendo@gmail.com

NOTE: Your email address will be your username

Medium: try adding just a few more non-repeating characters

*We suggest you do not include any personal information or common phrases

Security Question #1

In what city did you attend high school

Pendo

MY SCHOOL BUCKS

litroyj+Pendo@gmail.com

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Security Question #1

In what city did you attend high school

Pendo

Security Question #2

What is the country of your ultimate d

Pendo

I would like to receive feature updates, news and promotional emails from MySchoolBucks

MY SCHOOL BUCKS

Security Question #1

In what city did you attend high school

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I would like to receive feature updates, news and promotional emails from MySchoolBucks

By creating an account, I accept the MySchoolBucks Terms of Service and Privacy Notice.

Cancel Create Account

MY SCHOOL BUCKS

HOME > SIGN UP

Sign Up

Search for your district by state or province

Select State/Province

Cancel Create Account

Heartland
A Global Payments Company

Contact Us Home

MY SCHOOL BUCKS

HOME > SIGN UP

Sign Up

Search for your district by state or province

Arizona

OneDistrict

Troy

Jones

Mobile Phone Number

Enter your mobile phone number and check the Allow MySchoolBucks to send me text alerts at my request box to receive important account information (e.g. password reset) via text message.

(484) 557-1739

Terms of Service | Privacy Notice

MY SCHOOL BUCKS

reset) via text message.

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litroyj+Pendo@gmail.com

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Security Question #1

In what city did you attend high school

Pendo

17.82%

Completed funnel over Aug 1, 2021 - Sep 30, 2021
113382 of 636104 total attempts

2m 59s

Avg time to complete funnel



MY SCHOOL BUCKS

litroyj+Pendo@gmail.com

NOTE: Your email address will be your username

Medium: try adding just a few more non-repeating characters

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Security Question #1

In what city did you attend high school

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MY SCHOOL BUCKS

Security Question #1

In what city did you attend high school

Pendo

Security Question #2

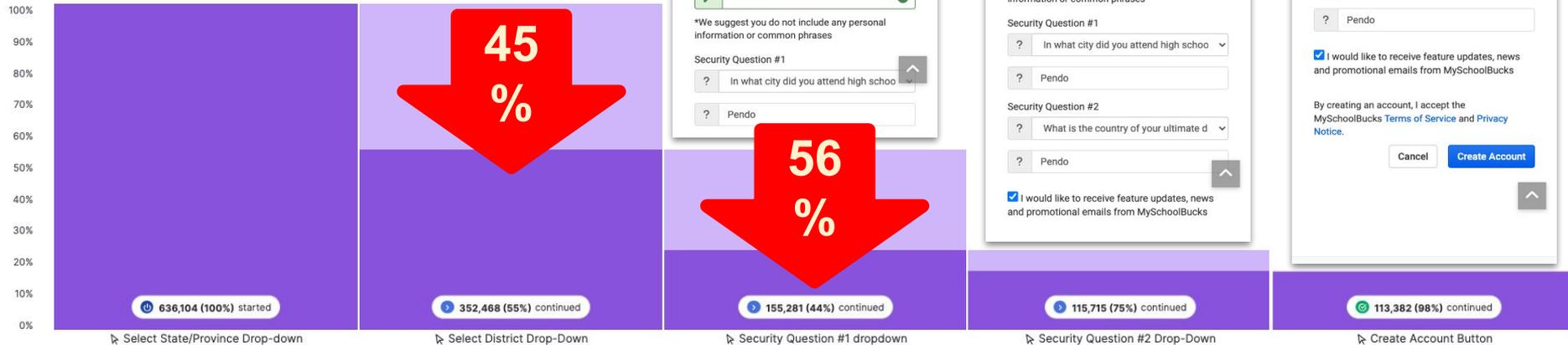
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Pendo

I would like to receive feature updates, news and promotional emails from MySchoolBucks

By creating an account, I accept the MySchoolBucks Terms of Service and Privacy Notice.

Cancel Create Account



PENDOMONIUM 2023

Key Insights



- Confirmation of complex workflow
- Customer list exposed to competitors
- Largest drop-off at security questions
- Missed marketing opportunities quantified
- Goal to increase signups by 10%

MY SCHOOL BUCKS English Log In

School payments made easy

From the cafeteria to the classroom, pay anytime, anywhere from your mobile phone or computer.

[Sign Up Free](#) [Download App](#)

MySchoolBucks Partner
GREENLIGHT
The only kid's debit card that connects to MySchoolBucks
[Learn more](#)

MY SCHOOL BUCKS Log In

Create Account

Enter your email address and press Get Started to sign up today.

Email Address

[GET STARTED](#)

By selecting Get Started, I accept the Privacy Notice.

MY SCHOOL BUCKS

Create your Account

Hi, lltroj+Pendo@gmail.com! Your email address is your username. Let's finish setting up your account. It will just take a minute.

Your First Name

Your Last Name

Mobile Phone Number

Allow us to send text messages for password resets*

* Message and data rates may apply. Msg freq varies. Text HELP to 58864 for help. Text STOP to 58864 to cancel. [Terms of Service](#) | [Privacy Notice](#)

[BACK](#) [CONTINUE](#)

Having trouble or confused? [Support](#)

MY SCHOOL BUCKS Log In

Password Setup

Next, choose a password for your new lltroj+Pendo@gmail.com user account.

Password

Confirm Password

Show Password

Send me news, exclusive offers, and promotional emails

By creating an account, I accept the [Terms of Service](#) and [Privacy Notice](#).

[BACK](#) [CREATE ACCOUNT](#)

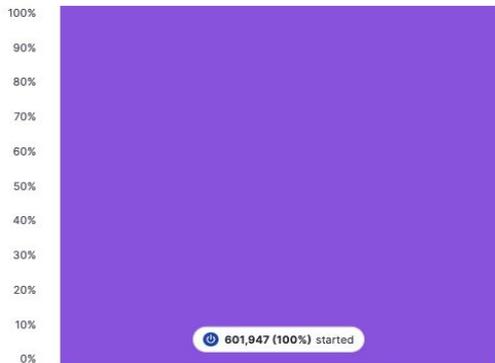
Having trouble or confused? [Support](#)

55.82%

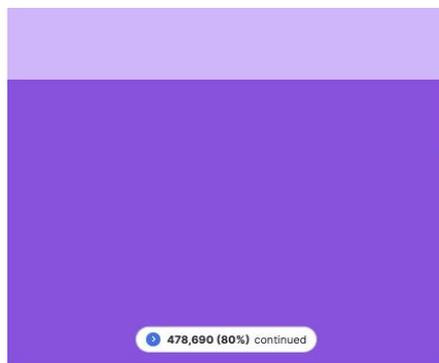
Completed funnel over Aug 1, 2022 - Sep 30, 2022
335988 of 601947 total attempts

1m 20s

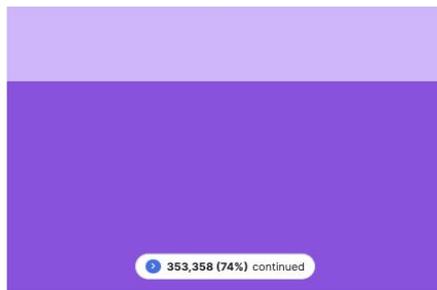
Avg time to complete funnel



User Sign Up - Email Address Entry (New)



User Sign Up - Get Started (New)



User Sign Up - Create Account - Continue (New)



User Sign Up - Password Setup - Create Account (New)

How we used Pendo

- Tagged **Pages & Features**
- Created **Funnels**
- **Analyzed** data to **validate** assumptions and success of changes.

Quick BIG wins

- **Increased signups** by 38%
- **Reduced time** to sign up by 1 minute, 39 seconds
- **Identified** next problems to solve



Our Learnings & Key Takeaways

Our Learnings



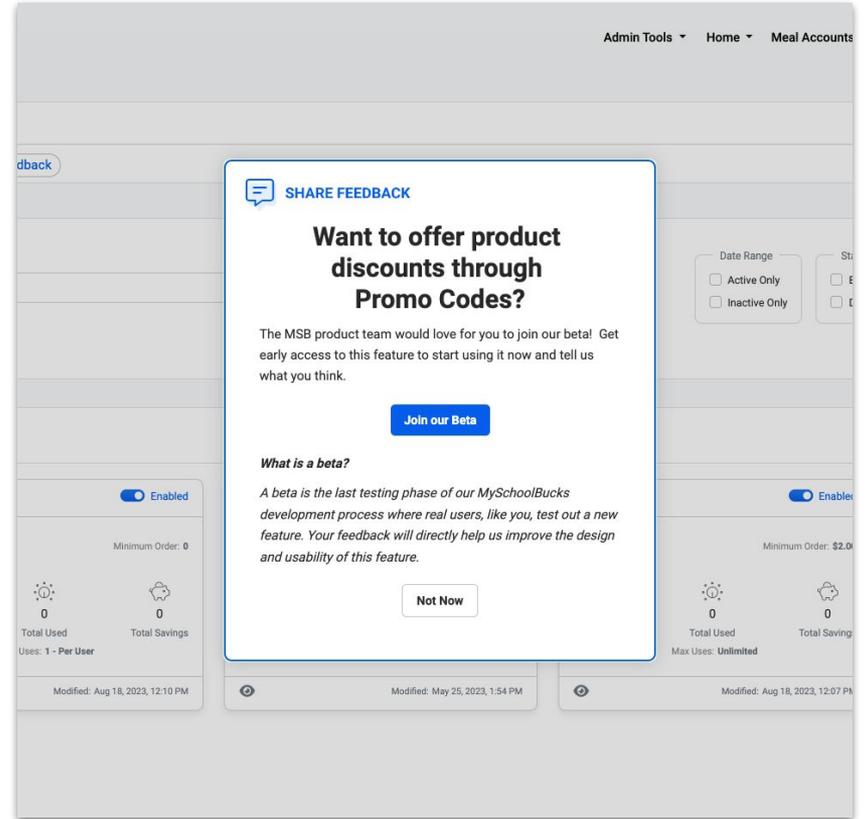
- Don't get hung up on not being a Pendo SME
- Simple guides can be used for more than self-help
- Simple funnels & path reporting can be illuminating
- Most Important - *Start with a problem, any problem*

Key Takeaways

Quick BIG wins with *basic Pendo* *features*

- Help customers help themselves
- Learn more about your customers
- Use data to understand impact & prioritize problems
- Use data to measure results
- Be creative!

What's next?



Admin Tools ▾ Home ▾ Meal Accounts

dback

SHARE FEEDBACK

Want to offer product discounts through Promo Codes?

The MSB product team would love for you to join our beta! Get early access to this feature to start using it now and tell us what you think.

[Join our Beta](#)

What is a beta?

A beta is the last testing phase of our MySchoolBucks development process where real users, like you, test out a new feature. Your feedback will directly help us improve the design and usability of this feature.

[Not Now](#)

Date Range Active Only Inactive Only

Enabled

Minimum Order: 0

Total Used: 0
Uses: 1 - Per User

Total Savings: 0

Modified: Aug 18, 2023, 12:10 PM

Enabled

Minimum Order: \$2.00

Total Used: 0
Max Uses: Unlimited

Total Savings: 0

Modified: Aug 18, 2023, 12:07 PM

Modified: May 25, 2023, 1:54 PM



Questions



Thank you!

PENDOMONIUM 2023



PENDO MONIUM 2023