PENDOMONIUM 2023

Using Pendo to Determine Your Product's Direction



Connor Kamp

Head of Customer Success, Nasdaq Dorsey Wright

Agenda

- Intro to Nasdaq Dorsey
 Wright
- Why Pendo?
- Evaluating Current UX
- Putting Pendo to Work
- How Is It Working?

- Investment research and advisory firm
- Founded in 1987, acquired by Nasdaq in 2015
- Client base is financial advisors
- NDW Research Platform is the foundation of our business



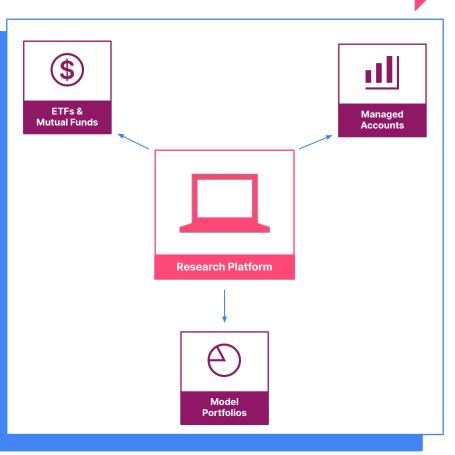
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Approximately 4,500MAUs

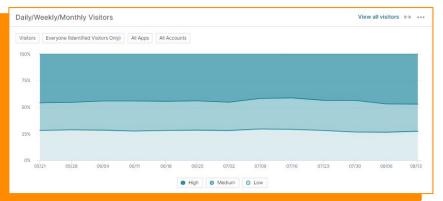
- Avid and loyal user base
 Specialized investment
- Specialized investment methodology
 - Initial barrier to entry
 - Users that clear that hurdle tend to stay long-term

Monthly Active Users



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Average User Lifetime



Why Pendo?

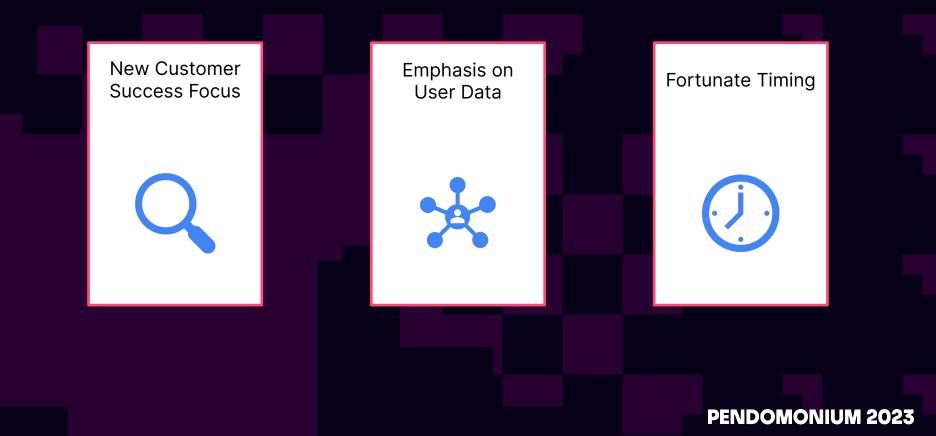
Life Before Pendo

Last Access	Page Hits
09/19/23	47
11/15/22	120
09/19/23	560
02/18/23	11
09/15/23	230
09/22/23	950
09/06/23	369
09/19/23	755

Time Stamp	Page URL	
November 15, 2022, 8:01 am	/reports/database/menu/stocktype/1/rpt/73	
November 15, 2022, 8:00 am	/reports/database/menu/stocktype/1/rpt/52	
November 15, 2022, 7:56 am	/reports/database/menu/stocktype/1/rpt/49	
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November 15, 2022, 7:32 am	/api/v2/data-alerts/get-alerts	
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November 9, 2022, 11:21 am	/api/v2/alerts.custom-rs/get-alerts	
November 9, 2022, 11:21 am	/api/v2/data-alerts/get-alerts	
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 Very limited usage data
 Time-consuming to generate and analyze
 aggregated reports
 Difficult to decode
 Development resources required for reporting

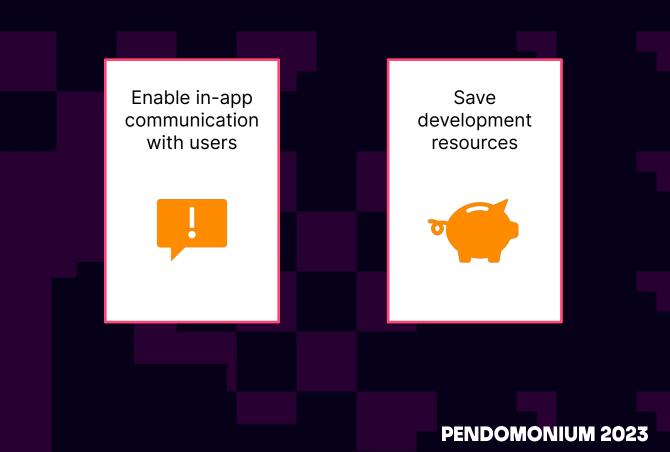
What Brought Us to Pendo?



Why Pendo?

Improve our knowledge of the average user experience





Evaluating Current UX

Evaluating Current UX

Chart page sees the most traffic *by far*





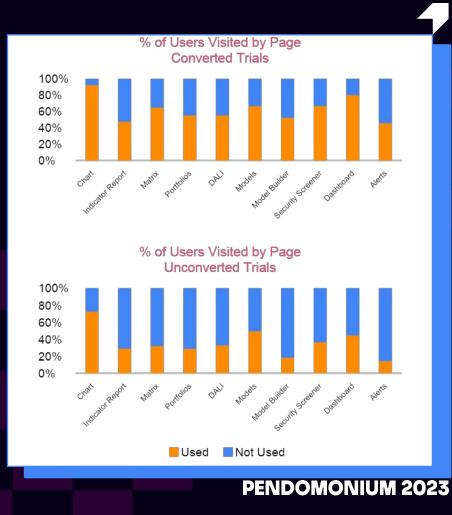
PENDOMONIUM 2023

Page Views

Evaluating Current UX

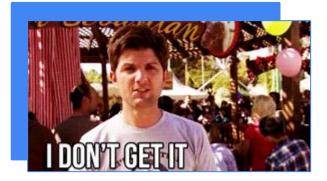
Converted trials are far more likely to have used other areas of the platform





Evaluating Current UX

New Users



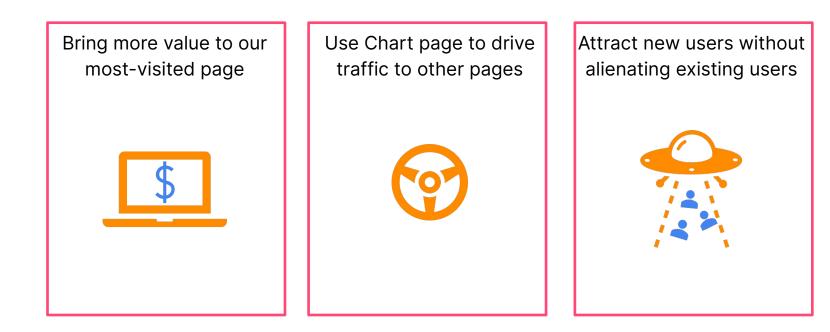


I love it. NEVER change it!

The Plan



Chart UX Upgrade Goals



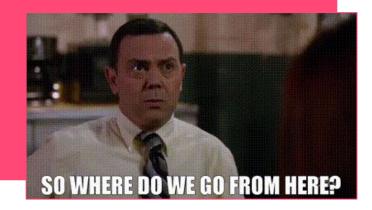
The Before

- Lots of wasted space pushing important information down page
 - Helpful tools scattered across the page, not organized in thoughtful way
 - Value-added information hard to find
 - Little for new users to quickly and easily understand

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Putting Pendo to Work

Putting Pendo to Work



Incorporate Pendo analytics, guidance, and feedback to develop, communicate, and support product enhancements

Planning New UX/UI

Identified and contacted top users to ask:

- How do you use the Chart page?
- What features are essential?
- What is currently missing?

sitors Over 5	tors Over 5000 Visitors + Create Visitor Report 👌 🗓									
sitor ID 🔅	Page Views for Chart (Nasdaq Dorsey Wri ψ	Days Active for Chart (Nasdaq Dorsey Wr 💲	Time On Page (minutes) for Chart (Nasda 🔅							
	132869	180	35503							
	25230	153	3017							
	21532	180	14736							
	19292	169	12946							
	15125	132	10020							
	14075	165	12882							
	13755	117	4082							
	13572	154	16162							
	12944	142	10727							
	12823	164	10283							
	12585	119	6246							
	11892	143	6119							
	11293	134	5472							
	11208	170	8008							
	10775	142	6324							
	10768	158	11223							

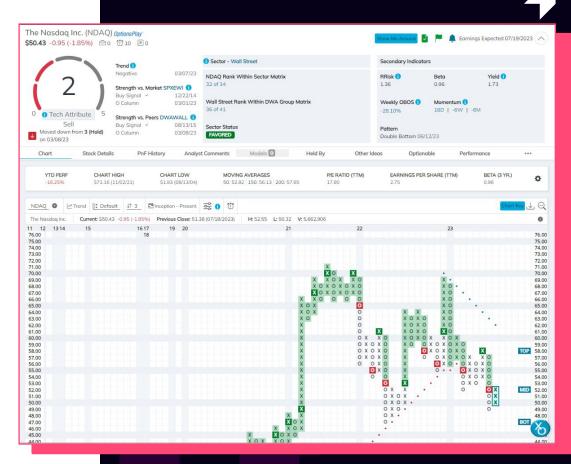
Planning New UI/UX

Tagged every clickable feature on the page to determine what to emphasize, de-emphasize, or remove



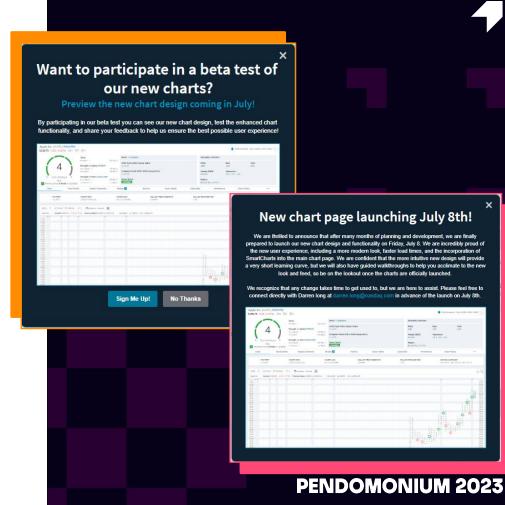
The After

- Integrated high-value, previously hidden tools directly into page
- Prioritized most heavily-used features
- Added elements to help new user comprehension



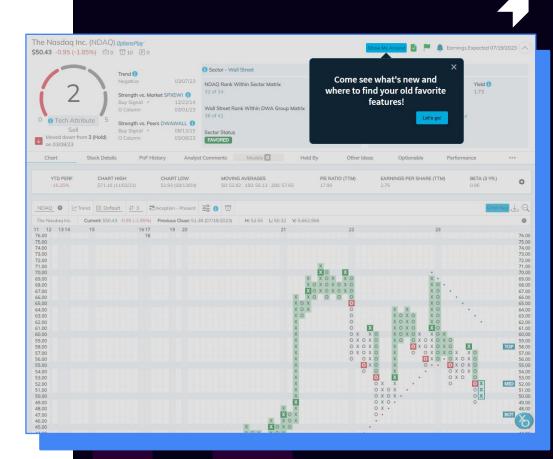
Creating Awareness

Used Pendo to message users in app to drive participation in our beta test and increase awareness of the new Chart launch



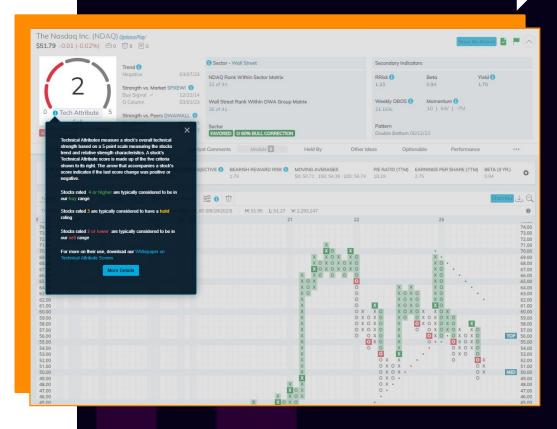
Educating Users

Created in-app walkthrough using Pendo Guidance to show users where to find existing features and introduce new features.



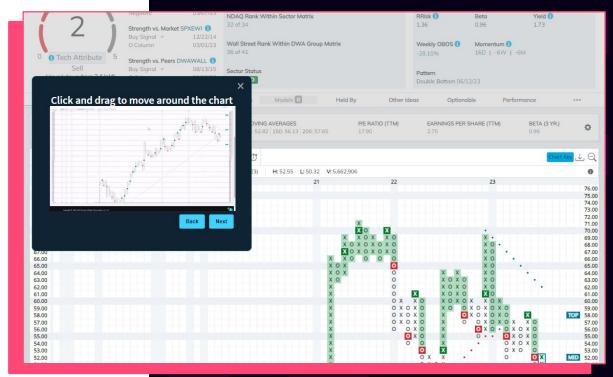
Educating Users

Added tool tips across the page to help explain certain features or data points



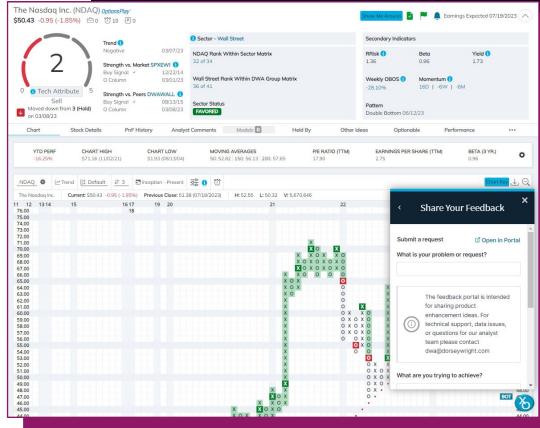
Educating Users

Used guides to showcase new, interactive features to users



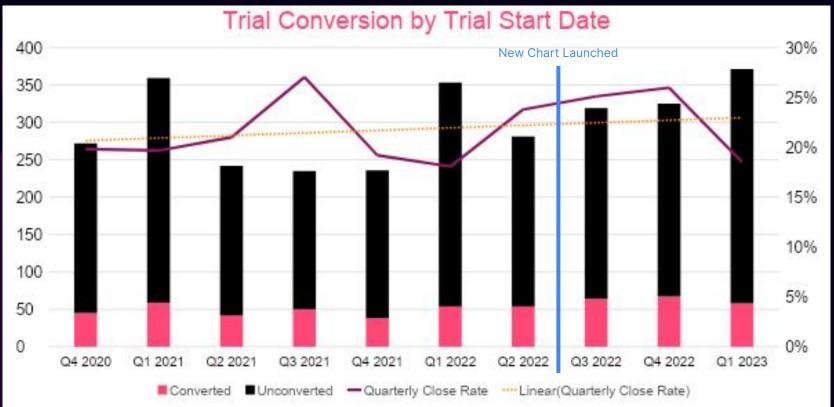
Fielding Feedback

Installed Pendo Feedback in our Resource Center to field additional requests and suggestions

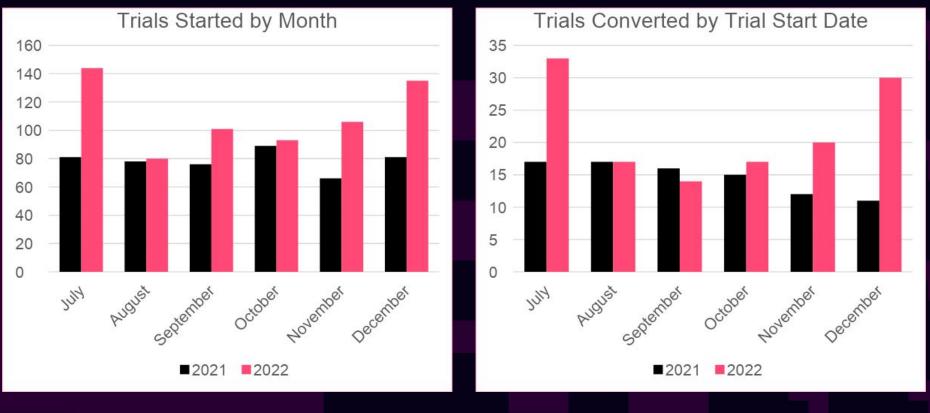


How is it Working?

We're attracting and converting more trials!



We're attracting and converting more trials!



Our users are happier!



PENDOMONIUM 2023

NPS

We're winning chart users over!







"Great customer service, reliable product, continued enhancements have added value."

"After 31 years of paying for this service, I find far more value today than I ever have."

"I've been a subscriber since the 1990s, it is the foundation to why I've outperformed over time. The service has lots of features, and it's improved regularly."

"New user features are always being added to make the system better!"

"It is a tool I could not be without. Further, NDW continues to innovate and add value. Thank you!"

Hear it from our detractors!

"I have been a subscriber since 1994. The service has detreated since the Wright and Dorsey sold out."

What's Next?

- Product-led growth via new freemium model
- Platform consolidation and process streamlining
 - Analyzing usage data, paths, and funnels to consolidate pages and simplify workflow
- More intelligent guide targeting based on usage patterns
 - Draw on success of trial onboarding guides to assist existing users

How will we pull it off?

With the tremendous support we know we can count on from the Pendo team.

THANK YOU GUYS FOR BEING SO SUPPORTIVE.

bbc





Thank you!

