

Pendo Getting Started Services Orchestrate Module Enablement

Onboarding Approach

The Pendo Getting Started Service for Orchestrate ("Professional Services") is a structured, time-bound engagement designed to help new and existing [Pendo.io](https://pendo.io), Inc. ("Pendo") customers realize value quickly with the Pendo platform ("Subscription Services") by learning the tools and best practices for their new Orchestrate module.

The engagement typically spans 4-6 weeks, during which a dedicated Consultant guides customers through key configurations, core enablement, and best practices to get the most out of Orchestrate and help you achieve your key use case.

Implementation Activities

Pendo will be responsible for the following Getting Started implementation services for Orchestrate: configurations support, platform/ module enablement and project management activities described in more detail below (collectively, the "Professional Services"):

Orchestrate Enablement Topics

- Kickoff & Goal Alignment
 - Introduce the Pendo team and objectives.
 - Establish objectives for using Orchestrate.
 - Validate Pendo is installed in production.
- Installation Configuration
 - Verify DNS setup for sending domains and optional MAIL FROM/tracking domains.
 - Ensure email metadata (Visitor ID, Email Address) is flowing into Pendo.
 - Review unsubscribe logic and permissions.
 - Integration setup and requirements
 - User Eligibility
- Orchestrate & Journey Overview
 - Orchestrate in the Product Management Lifecycle
 - Reviewing Top Use Cases
 - How to Create Journeys and Messages
 - Journey Analytics Overview
- Email Overview and Journey Analytics
 - Why Email is Important for Your Business
 - How to Create Emails In Orchestrate
 - How to Personalize Your Emails

Consultant Activities

- Conduct a project kickoff meeting with the Customer
- Facilitate discussions on key objectives for the engagement, align on priority for the Getting Started engagement, and coordinate schedules
- Share proven best practices and implementation strategies
- Provide project status updates on risks and blockers

Deliverables

- Kickoff/ Goal Setting Deck
- Email Domain Verification Created
- Integrations Setup (if applicable)
- Orchestrate Settings Optimally Configured
- Journey Enablement & Best Practices
- Email and Guide Enablement & Best Practices
- Two Office Hours (Dispersed as needed)

Customer Roles and Responsibilities

Customers are expected to:

- Install the Pendo snippet or SDK (if applicable)
- Provide access to relevant applications and environments
- Assign key roles (see below)
- Participate in required planning, enablement, and validation activities
- Align internally to define and adopt Pendo governance and processes

Recommended project roles and associated time commitment is as follows:

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	10% FTE
Champion	Primary point of contact who will oversee adoption of Pendo and establish metrics for success.	10% FTE
Technical Owner	Technical owner of the Pendo solution, ensures proper configuration and installation of Pendo on apps, and initial metadata. The majority of effort is in the first 30 days.	5% FTE

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Pendo User	Enables project success at the ground level. Manages the Pendo subscription on a day-to-day basis including activities such as tagging, template design, and implementation and adoption of the Pendo solution. Ensures Pendo is installed on their application during the Install Review session(s).	20% FTE
Project Manager (Optional)	Works closely with Pendo consultant to manage schedules, resources, and risks to ensure on-time delivery.	10% FTE

Assumptions

- Customer will install Pendo code on the applicable Customer and provide access to Customer's Pendo subscription and such application(s) as needed to provide Professional Services.
- Pendo will not modify Customer application code. For clarity, Customer is responsible for installing the Pendo code snippet in its application(s).
- The Professional Services expire and must be consumed within 45 days after contract execution
- The Professional Services include up to the specified number of applications and use cases covering the Implementation Activities as described above. For clarity, Customer must have an active, paid subscription for any application key in scope for the Professional Services.
- The Professional Services will be performed remotely. Onsite travel can be contracted via a change request and in accordance with the terms of the Agreement.

The Getting Started implementation services for Orchestrate performed by Pendo in accordance with this Services Description are referred to as "Professional Services." This Services Description is incorporated into the Pendo Order Form or other ordering document between Pendo and a customer covering the purchase of applicable Professional Services.

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