

Pendo Launch Basic Services

Onboarding Approach

The Pendo Launch Basic Service ("Professional Services") is a structured, time-bound engagement designed to help new [Pendo.io](https://pendo.io), Inc. ("Pendo") customers—either onboard their first application or expand with a new module—realize value quickly with the Pendo platform ("Subscription Services"). This package is tailored for organizations scaling up their usage of Pendo, especially those with 100+ employees or those implementing a new Pendo module such as Listen or Orchestrate.

The engagement typically spans 4 to 6 weeks, during which a dedicated Consultant guides customers through installation and core enablement for one application.

Implementation Activities

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

Installation Support

- Provide consultation on the technical deployment of the Pendo snippet or mobile installation
- Advise on metadata requirements and provide guidance on a standardized implementation approach
- Pendo will perform an installation review to validate that the initial Pendo installation is functioning as expected

Platform Enablement

- Tagging Enablement
 - What tagging is and why it matters (data collection, analytics, insights).
 - Differences between manual and auto-tagging.
 - How to tag features and pages in the Pendo UI.
 - Using CSS selectors and handling dynamic elements.
- Segmentation Enablement
 - What segments are and why they matter (targeting, personalization, analysis).
 - Key differences between visitor- vs. account-level segments.
 - How to use visitor and account metadata fields.
 - Filtering by product usage (events, features, pages).
 - Leveraging custom metadata for tailored segmentation.
- Best Practices
 - Naming conventions and organization.
 - Deciding what to tag (core workflows, adoption paths, key features).

Consultant Activities

- Coordinate resources from Pendo to support the project objectives and schedule
- Share proven best practices and implementation strategies
- Provide regular project status updates
- Deliver project recap

Deliverables

- Install Validation in Production
- Tagging Enablement & Best Practices
- Segments Enablement & Best Practices
- Two Office Hours (Dispersed as needed)
- 2 seats of Pendo Essentials Web Training Certification

Customer Roles and Responsibilities

Customers are expected to:

- Install the Pendo snippet or SDK
- Provide access to relevant applications and environments
- Assign key roles (see below)
- Participate in required planning, enablement, and validation activities

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	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 Launch Basic implementation services 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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