

# Pendo Launch & Scale Services

## Implementation Approach

Pendo Launch & Scale Services ("Professional Services") are outcome-based implementation engagements delivered by Pendo.io, Inc. ("Pendo") to support a guided partnership to accelerate product adoption in priority applications while establishing a scalable Center of Excellence to govern, sustain, and expand value across the enterprise.

## Outcome-Based Engagement

**Launch & Scale Services** are designed to support customers through the following:

- Engagement Initiation: Kickoff with stakeholder alignment and CoE discovery.
- Installation: Validate installation, configuration, and metadata standards.
- Use Case Discovery: Identify high-value use cases tied to measurable business goals.
- Building Foundations: Targeted enablement on core Pendo features tied to key use cases, while establishing the foundational governance, standards, and processes that form the early Center of Excellence (COE).
- Use Case Activation: Launch first in-app experience and define repeatable rollout process.
- Experience Change Control: Implement change-control standards for customer experience updates.
- Impact Measurement & Insights: Institutionalize measurement and reporting practices for COE.
- Sustain & Scale: Transition of CoE ownership, finalize governance library, and roadmap.

## Implementation Activities

Pendo will be responsible for the following Launch & Scale implementation services (collectively, the "Professional Services"):

### Pendo Center of Excellence Initiation and Operationalization

- **Foundations** - Laying of groundwork to launch Pendo COE function
- **Activation** - Build momentum to establish stability in operating practices
- **Sustain & Scale** - Transition of CoE ownership and enablement plan for future rollouts

## Tier 1 Onboarding for up to 2 applications

- **Installation review** to ensure Pendo is configured correctly
- **Use case identification and implementation** to reach measurable outcomes tied to business goals
- **Consultant-led enablement** contextualized for your application, users, and data
- **Summary and recommendations documentation** for supporting longer term goals and initiatives

## Tier 2 Onboarding for up to 2 applications

- **Installation review** to ensure proper initial Pendo configuration
- **Use case identification and implementation plan** to reach measurable outcomes tied to business goals
- **Consultant-led enablement** contextualized for your application, users, and data

## Engagement Management

- Includes development of project plan, resource coordination, project syncs, and regular status updates
- Facilitated cross-functional team success definition, planning, and execution through onsite engagement

## Mind the Product Training

- **Product Management Foundations Workshop** focused on the following topics:
  - Product Development Lifecycle
  - Goals Alignment
  - Hypothesis & Testing
  - Roadmap Mindset
  - Characteristics of high performing product teams
- **Metrics for Product Managers Workshop** focused on the following topics:
  - What to measure and why
  - Crafting metrics
  - Key metrics concepts
  - Creating metrics plans
  - Risks
  - Operationalizing metrics
  - Driving an evidence-driven culture

## Deliverables

- Kick off deck for application launch track and scale (COE) track
- Project plan
- Documented architecture, business objectives, use case(s) and success criteria
- COE Charter
- Confluence/Sharepoint inventory including COE charter, Pendo governance, and onboarding resources
- Governance documentation
- Key new user resources
- Recap document (project summary and recommendations) at project close

## Customer Roles and Responsibilities

Customers are expected to:

- Install the Pendo snippet, SDK, or browser extension
- Provide access to relevant applications and environments
- Assign key roles (see below)
- Participate in required discovery, enablement, and validation activities
- Finalize COE governance decisions and key resources based on workshops, learnings and specific business needs

Recommended project roles and associated time commitment is as follows:

Recommended Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
<b>Executive Sponsor</b>	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	10% FTE
<b>COE Lead</b>	Primary point of contact who will oversee Pendo strategy, governance, and cross-functional alignment to drive adoption and impact.	20% FTE
<b>Pendo Specialists</b>	Guides, Analytics, Listen, etc SMEs that enable success at the ground level. Work closely with Tier 1 and Tier 2 apps on a day-to-day basis to ensure successful COE foundations and implementation of the Pendo solution.	20% FTE
<b>Technical Owner</b>	Technical owner of the Pendo solution, ensures proper configuration and installation of Pendo on apps, integrations, and initial metadata. The majority of effort is in the first 30 days.	5% FTE

Recommended Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
App teams	App team champion, tech lead, and daily users. Day-to-day users of Pendo for Tier 1 and Tier 2 apps, will be engaged in activities such as use case discovery, tagging, data review & analysis, and adoption of the Pendo solution. Ensures Pendo is installed on their application during the Install Review session(s).	10% FTE
Project Manager	Works closely with Pendo engagement manager to manage schedules, resources, and risks to ensure on-time delivery.	10% FTE

## Assumptions

- Customer will install Pendo code on the applicable Customer or third-party application(s) 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 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 expire and must be consumed within 365 days after execution of the Order Form or other ordering document between Pendo and the Customer
- Pendo can provide up to two onsite visits, at Customer's location, that is up to two days in length for up to two project team members at no additional cost. Additional onsite travel can be contracted via a change request and in accordance with the terms of the Agreement.
- Pendo Professional Services will be performed on a remote basis.

The Launch & Scale 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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