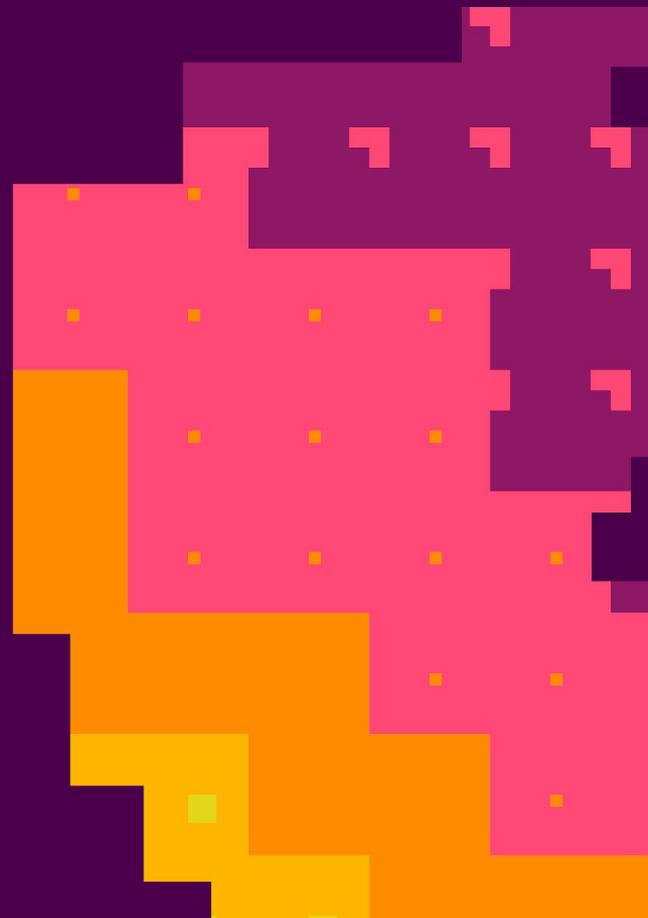PENDOMONIUM 2023

Selling the Value of Data
Going from Chips and Salsa to the Full Menu

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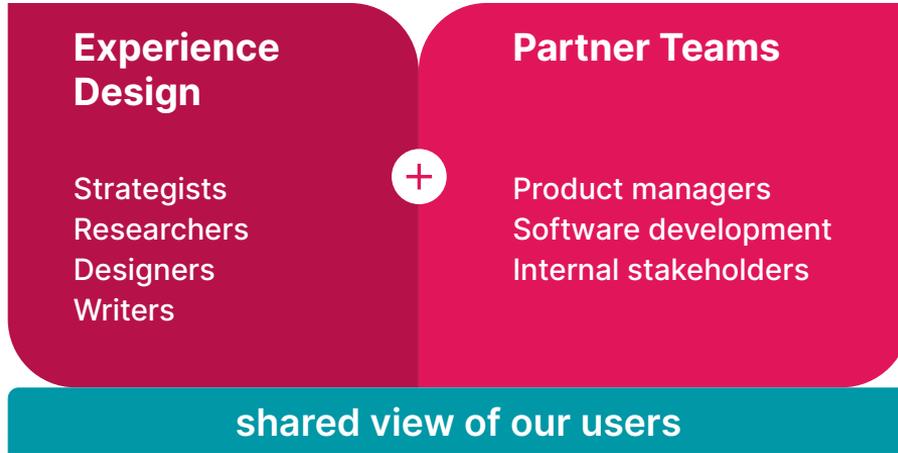
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Agenda

- The goal
- Design thinking
- Something for nothing
- Single source of truth
- Making it real

The goal

A shared view

Experience Design	+	Partner Teams
Strategists Researchers Designers Writers		Product managers Software development Internal stakeholders

shared view of our users

With a platform like pendo, the internal goal of our organization was to:

- Operate with a **shared understanding** of user's problems.

- Have a **single lens** or view of the users themselves.

Our "lingo"

- **Adoption** - The desired state of use where our technology is HOW someone performs a task.

- **Customers** - Users of solutions and products who are not Dell employees.

- **Internal users** - Dell team members who use our technology, this includes service delivery teams and technical support reps.

- **Pendo users** - Dell team members who use pendo, this include product management, designers, writers, and engineers.

Venn diagram of our user types
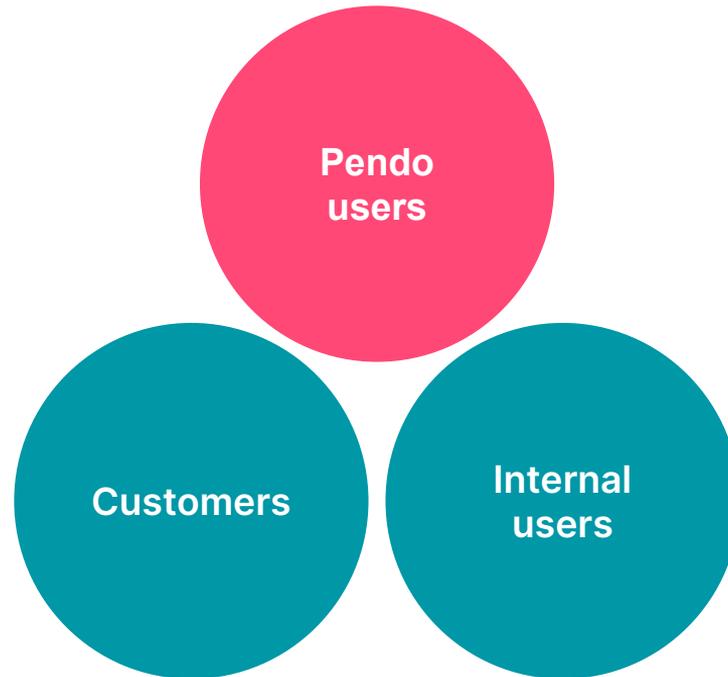
Design thinking

Design thinking

Empathize	Define	Ideate & Prototype	Test	Implement
Understand your user's needs and the obstacles that block them.	Articulate the challenge with a problem statement.	Brainstorm with a variety of perspectives, then experiment with mock ups.	Evaluate, get feedback and iterate.	Put into practice, then stage delivery to a wider audience.

Empathize: Round One

Experience Design		Partner Teams		Robust cross-functional superpower
Strategists Researchers Designers Writers	**+**	Product managers Software development Internal stakeholders	**→**	Teams who provide service and solutions that customers and internal users need and value.

shared view of our users

- Experience design needed data to better understand our end-users, but it was in various forms from different sources.

- Our partners also needed the same information so we could effectively align and become more user-driven.

Define / Problem Statement:

- After successfully reorganizing and re-focusing efforts and teams to support our overall company strategies, our instrumentation, **KPIs and data sources** were inconsistent and difficult to trace.

- As a centralized experience design team, we could see how product prioritization and user insights were not aligned from one team to the next, which was challenging our need for **cross-functional alignment** and **consistent feature priorities** to deliver exceptional user experiences.

- To increase adoption and meet our customer needs, our goal was to align on a **shared source of truth for core metrics**.

Hypothesis

- A **shared source of truth for core metrics** will help our our organization align on- and measure against goals.

- With better **transparency of user behaviors**, we can encourage more **user-driven business decisions** and feature priorities.

- With deeper **user insights**, our ability to predict the impact of feature- and service- changes will help us reduce operational effort and cost.

Ideate & prototype...

The pendo success team worked very closely to ensure a successful implementation of the technology and skills training. But, we needed to test ideas and see what would resonate with our (internal) customers to drive adoption.
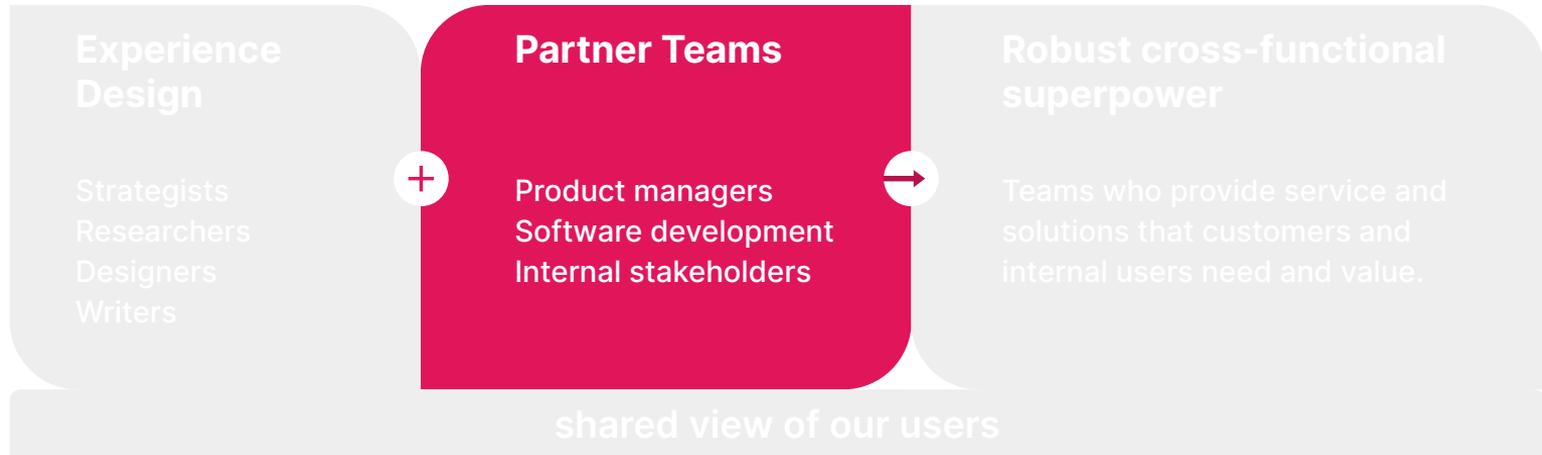
With dashboards

Widgets helped us design:

- by service
- by product features
- by product manager
- by user segments
- by devices
- by languages

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Test results

- Responses were as varied as our hypothetical dashboards
- **Skepticism** - "How did you get that?", "What is this based on?" "Don't we already have that data?"
- Vetting and validation - We needed to make data relatable against competitors and explain "**What good looks like**".

Empathize: Round Two

Experience Design

Strategists
Researchers
Designers
Writers

+

Partner Teams

Product managers
Software development
Internal stakeholders

→

Robust cross-functional superpower

Teams who provide service and solutions that customers and internal users need and value.

shared view of our users

New tools and data = More work and responsibilities

Essentially, our partners and stakeholders are busy (we all are!). So we really needed to find a way to deliver **value without effort**... essentially we needed to bring team members "Something for nothing".

Something for nothing

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Tried and trued restaurant journey

1 → **2** → **3** → **4**

Chips & salsa

Instant gratification, commitment, and delight.

Menu

Read details understand what's available, and what you want.

Order

Ask relevant questions, arrive at a decision and set expectations.

Enjoy

Consume what you want and need. Come back for more.

Iteration 2 – streamline EVERYTHING

Standardize essential data that everyone in the organization uses and is responsible for measuring:

- **CSAT** - Customer Satisfaction rating. As a company, we have this in aces, but it was not universally shared, and not in the same format.
- **NPS** - Net Promoter Score. Again, we have droves of data, but it's nested within multiple tools, and difficult to trace back to individual products / features / users.
- Deliver with defined scales / benchmark values for our company and our competitors to help teams articulate "**What good looks like**".

→ **Single source of truth**

One Dashboard – all Segments

At first, we created a single dashboard with sections for each service / product. Filters make this much easier to share so team members can view the segments or accounts that they want to see, without having to scroll for ages:

→ **Making it real**

Current pendo adoption model

1 → **2** → **3** → **4**

Chips & salsa

CSAT / NPS

Instant data, focus areas identified, clear idea of "How are we doing?"

Menu

Explore Data

Follow numbers, explore data, funnels, paths, and guide metrics.

Order

Assess impact

See impact (number of users who use/may use) features / services / products.
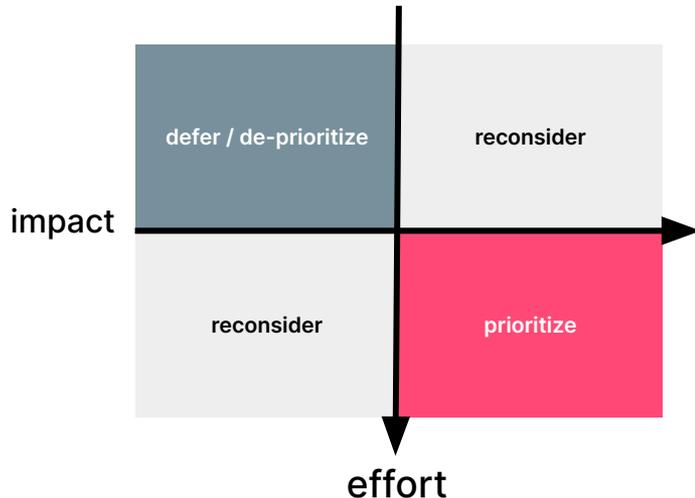
Enjoy

Align

Prioritize actions and features in User-led model.

Users drive decisions

Robust cross-functional superpower

Teams who provide service and solutions that customers and internal users need and value.

defer / de-prioritize

reconsider

impact

reconsider

prioritize

effort

Feedback and sentiment are now shared with stakeholders to validate:

- Features with low impact forecast are deferred to make room for higher performers.

- New capabilities are paired with tutorials and feedback to provide user performance and perspective

What "good" really looks like...

Before	Now
I need a button called _____ that _____ when a users clicks it.	How can we drive awareness of our new service to the right users?
Can you download a .CSV and send to it me so I can analyze it myself?	I need my permissions updated so I can create and share a new dashboard.
I need screens for a new service that does _____ and _____.	How many potential users can we help if we _____?
Can you get me a "wireframe" of _____ by tomorrow?	Where's happy hour tomorrow?

Thank you!

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