PENDOMONIUM 2023

Using behavior insights to prioritize product efforts and improve internal tools

Pendo for SaaS CRM

Will Culbertson

Director of Data & Analytics
Fidelity Investments

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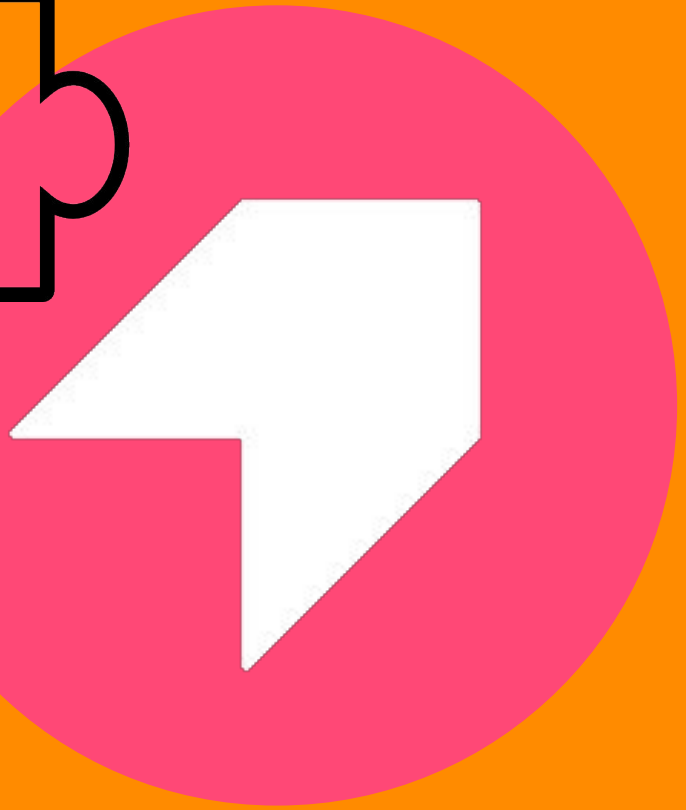
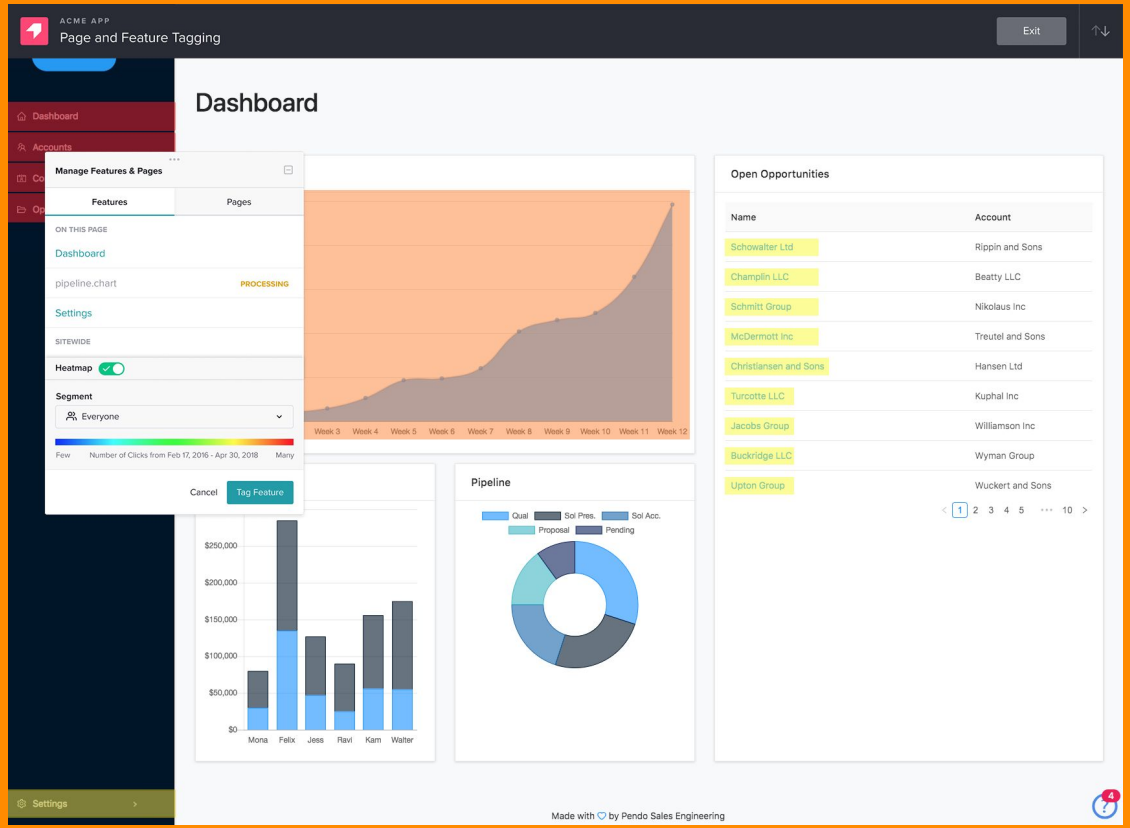
Agenda

- Sustain Performance
- Enhance User Experience
- Reduce Time to Market

Sustain Performance



Why Doesn't Anyone Use this Feature?



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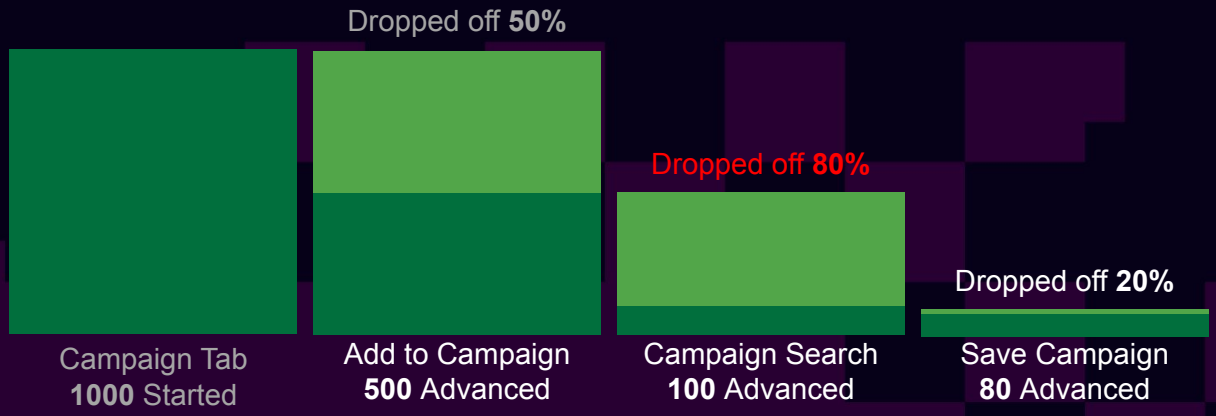
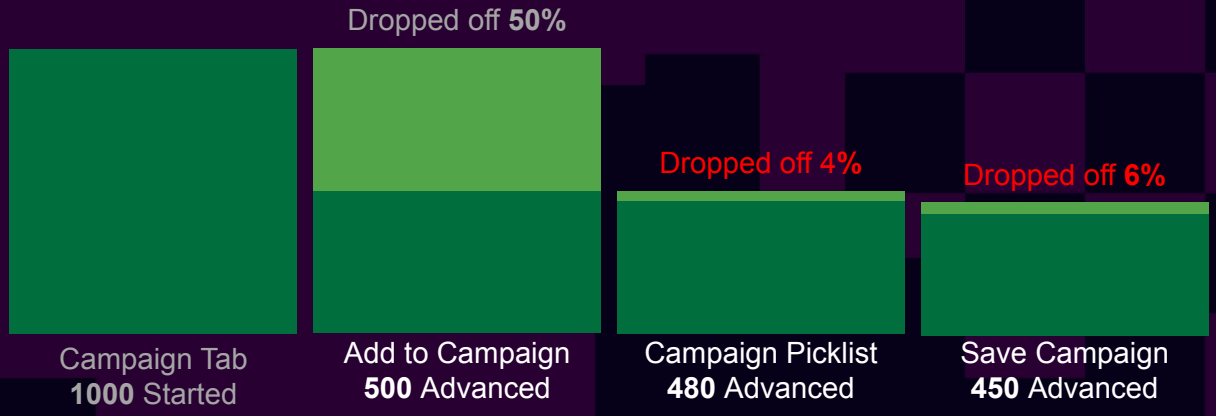
Improve Employee Experience

Why Do Reps Give Up After Searching?



Workflow Success Rate BEFORE
80/500

16%



Workflow Success Rate AFTER
450/500

90%

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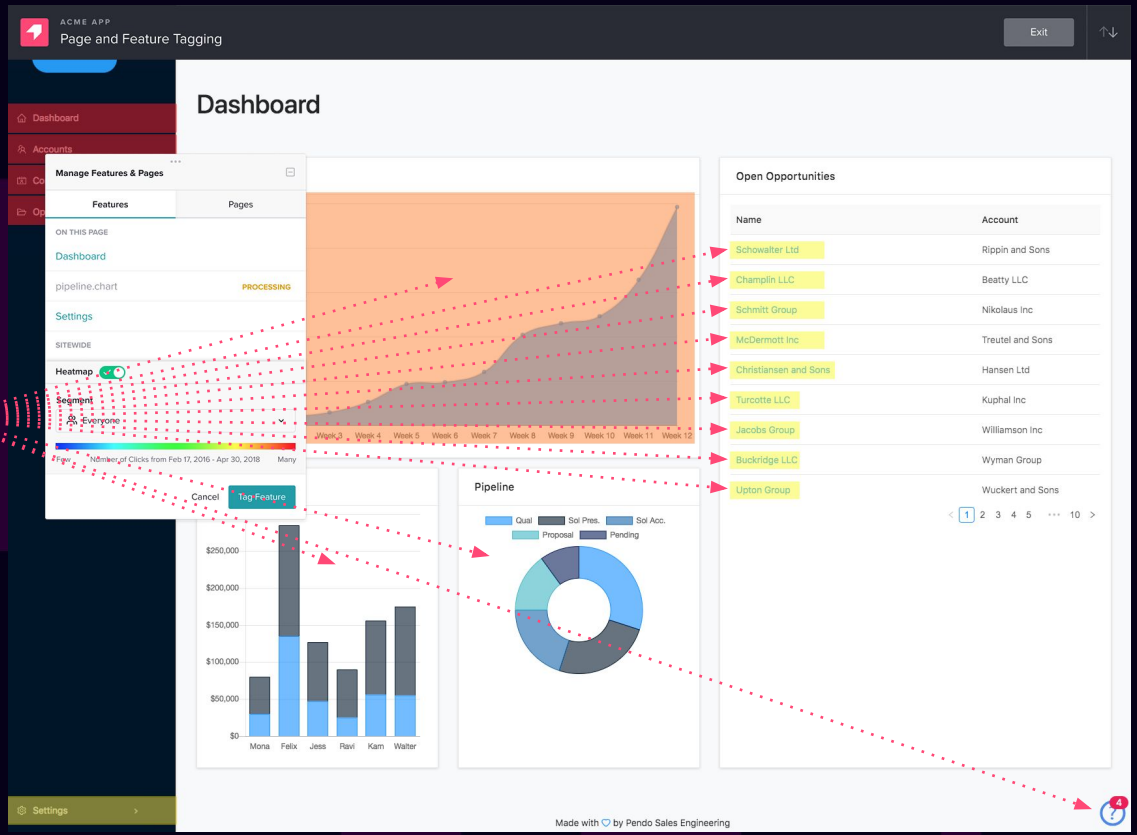
Implementing the Negotiated Metric

Dashboard Adoption
Interactors / Visitors



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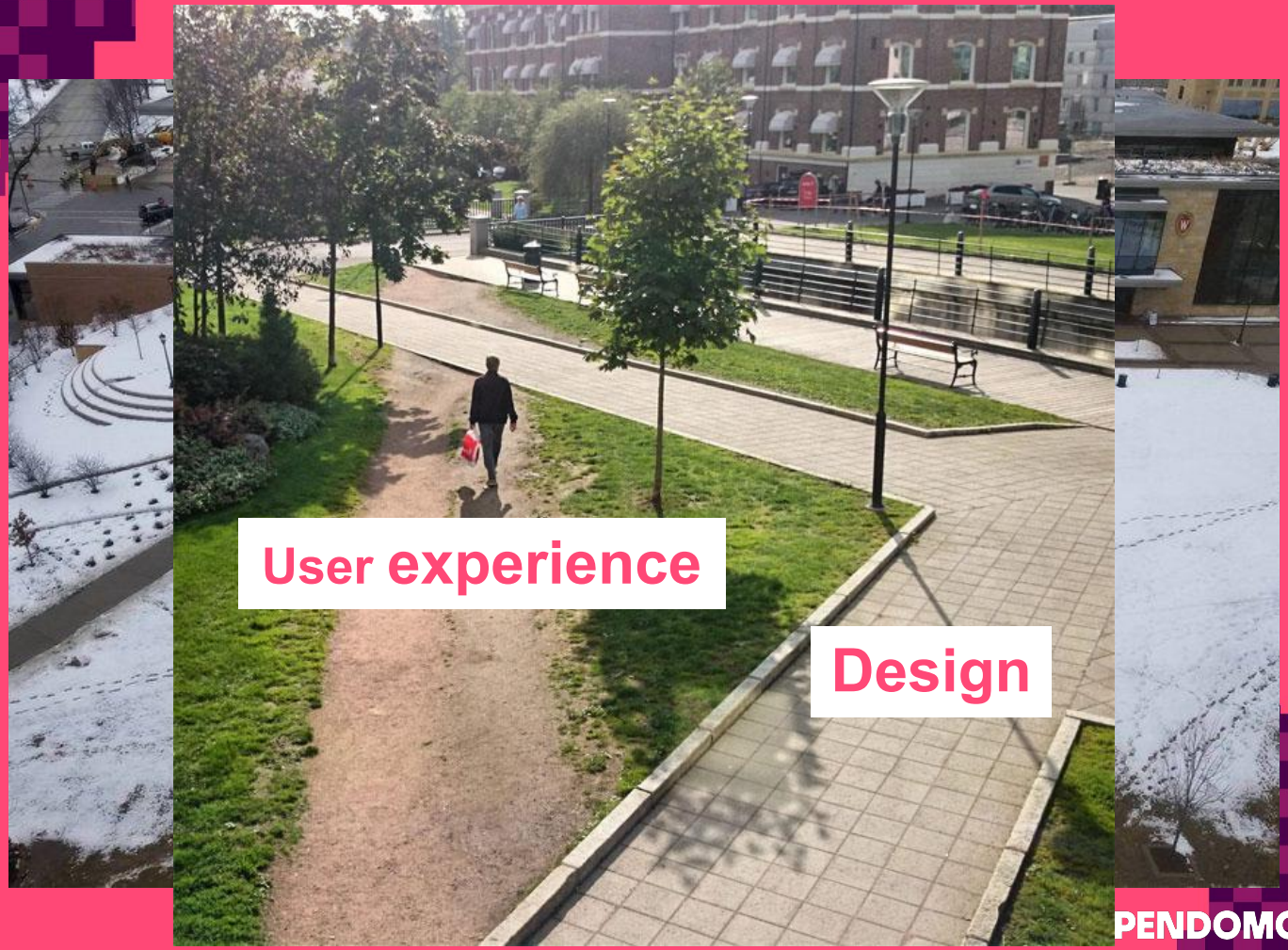
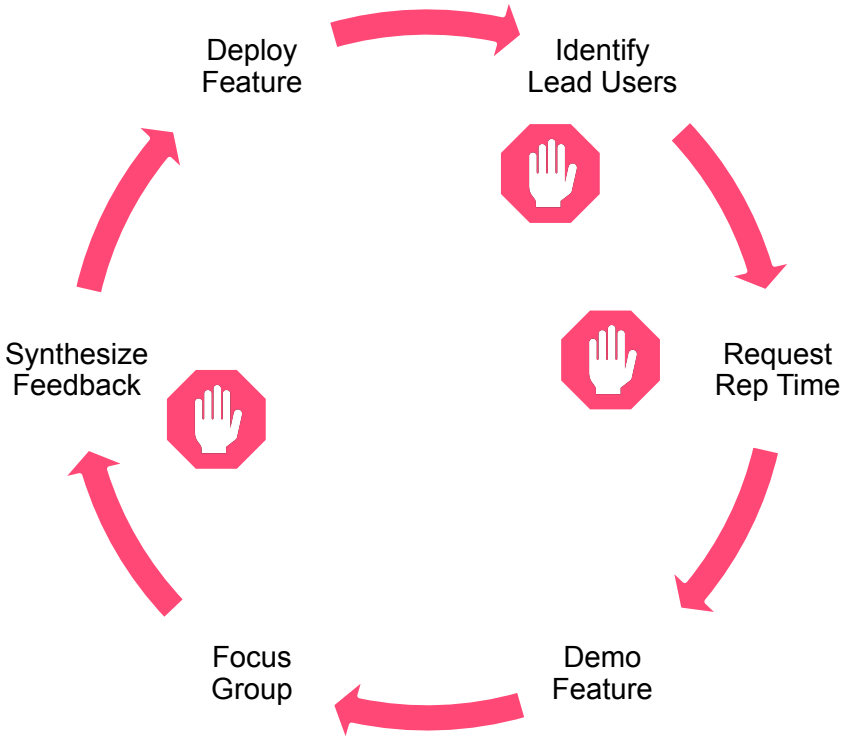
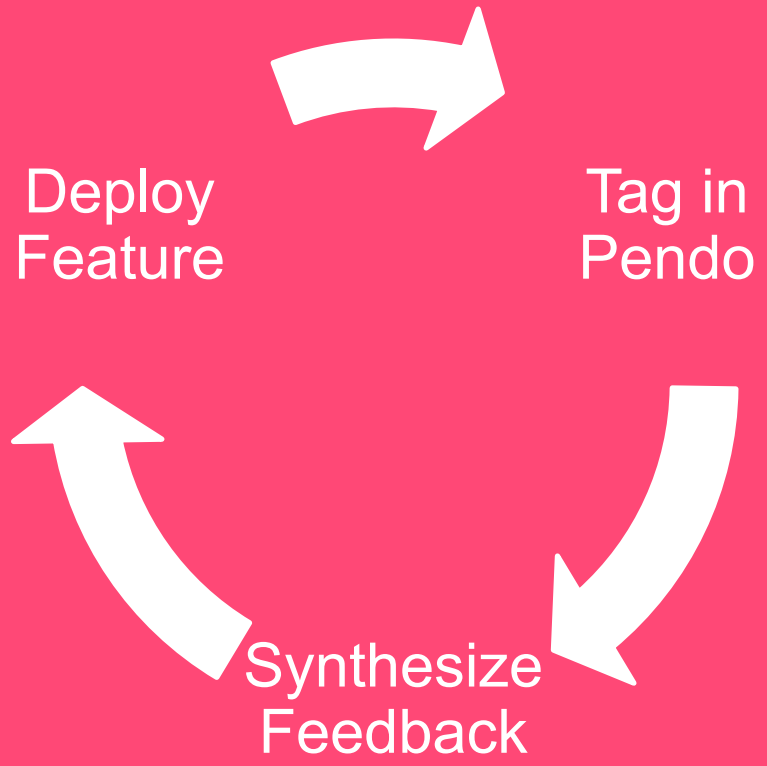
Reduce Time to Market

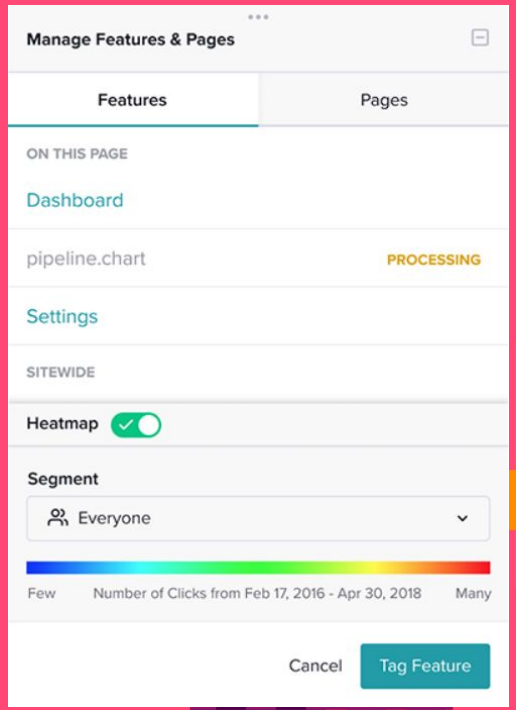

User experience
Design


Deploy Feature
Identify Lead Users
Request Rep Time
Demo Feature
Focus Group
Synthesize Feedback


Deploy Feature
Tag in Pendo
Synthesize Feedback

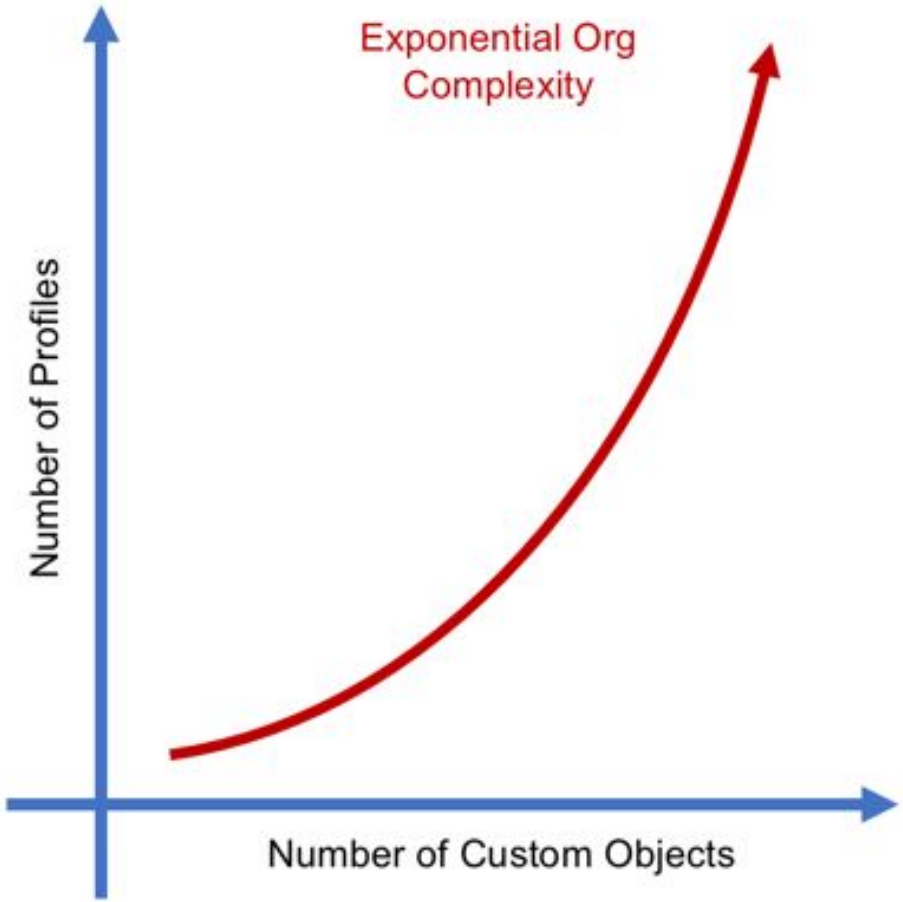
Why is “Client” Clicked More Often?

Appointment	Client	Date
Investment Advice	ANDREW ST. BERNARD	21 Nov 2023
Retirement Planning	JAMES HALPERT	10 Nov 2023
Investment Advice	PAM HORNETSLY	16 Nov 2023
Tax Planning	SCHWIGHT DRUTE	14 Nov 2023
Retirement Planning	SCHWIGHT DRUTE	23 Nov 2023
Wealth Management Application	MICHAEL SCARN	17 Nov 2023
Wealth Management Application	MICHAEL SCARN	10 Nov 2023
Wealth Management Application	MICHAEL SCARN	24 Nov 2023
Wealth Management Application	MICHAEL SCARN	1 Dec 2023
Wealth Management Application	MICHAEL SCARN	8 Dec 2023

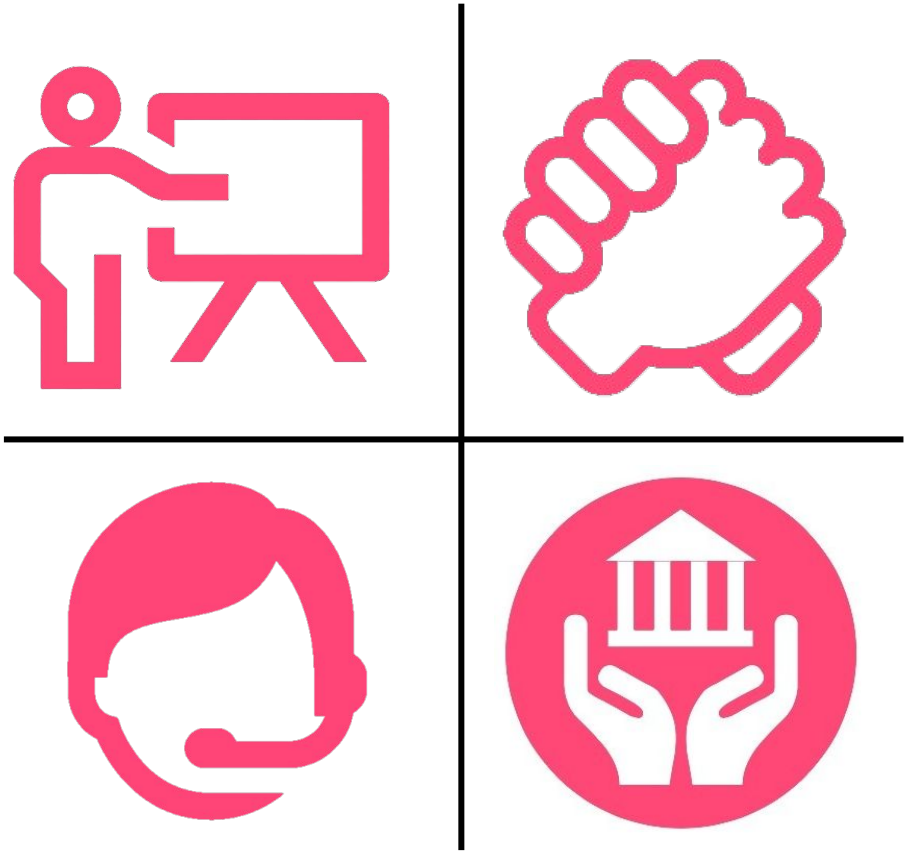


What should we work on next?

How to Succeed on SaaS Platforms


Exponential Org
Complexity
Number of Profiles
Number of Custom Objects

Doc·u·men·TA·tion (n): Broccoli for SW Devs



Thank you!

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PENDO MONIUM 2023