



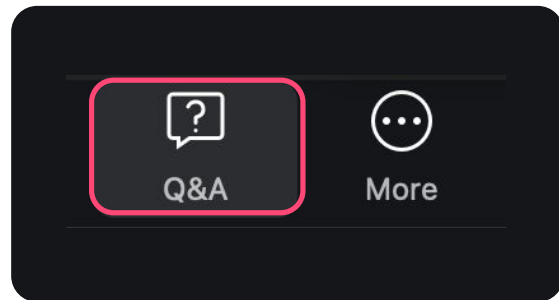
**How Teachable's AI support
agent resolved 86% of
conversations initiated by Pendo**

Agenda

- 1 Two challenges facing every support agent
- 2 How to connect product context to agents
- 3 Teachable's results after 6 weeks live

Ask us anything

Drop your Qs in the Zoom Q&A box
We'll answer them live 🎉



Speakers



McKenna Seyboldt

Sr. Product Marketing
Manager

Pendo



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Sr. Director, AI
Products

Pendo



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Product Support
Associate Director

Teachable



The bar for great customer service has never been higher.

And most AI agents aren't clearing it.

86%

of CX leaders say customers will drop brands that can't resolve issues on first contact.¹

71%

of customers expect personalized interactions.¹

Deploying an agent is step one. Now, how do you get it to work?

34%

say AI support "made things harder," and that number jumped 8 points in just 6 months.²

There are 2 core challenges facing support agents:

Your agent has no context into your user, like what they're doing in-app or what's set up.

Your agent doesn't know when it's needed and can't take action proactively.

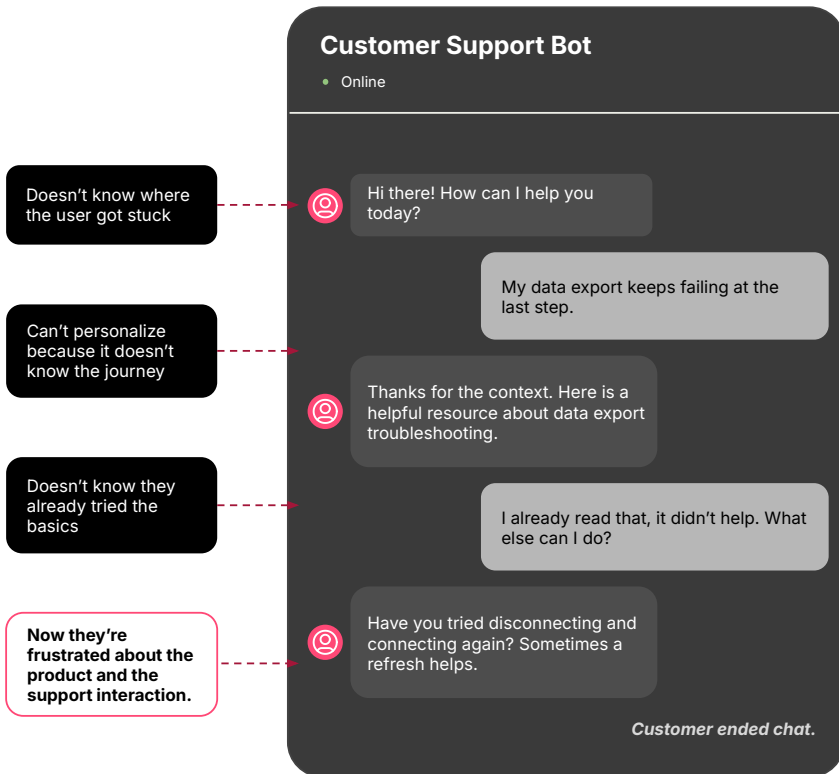
CHALLENGE 1

Your agent has no context about your users.

Agents don't know the user journey, where frustration happens, or what they're trying to do.

That leads to:

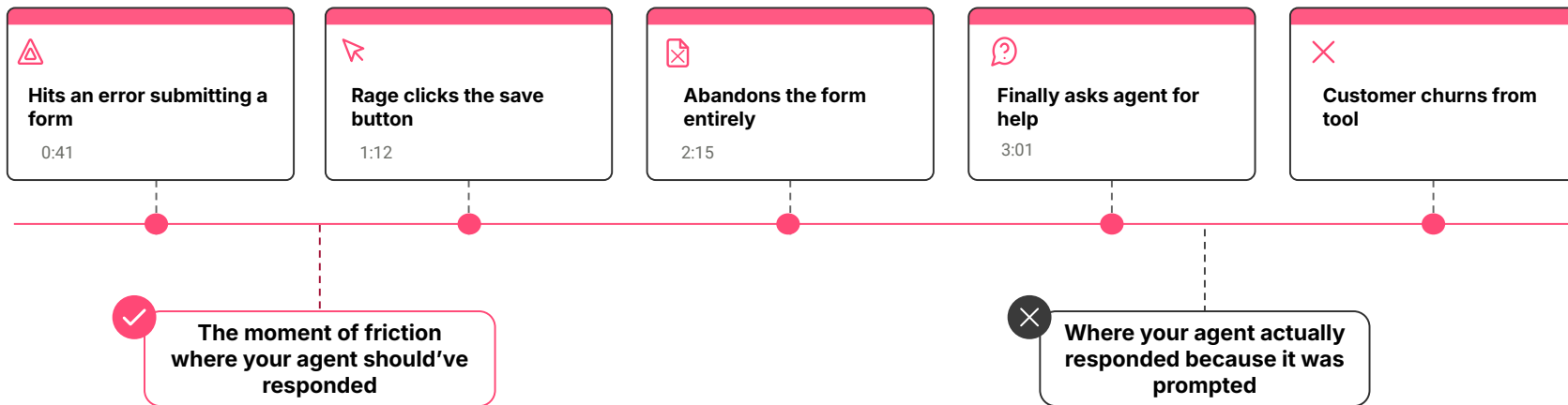
- Generic, one-size-fits-all answers
- No guidance when users actually need it
- Support that dead-ends and frustrates users



CHALLENGE 2

Your agent doesn't act when your users need it most.

User journey



The Solution

- 1 Your agents need **context** about your users.
- 2 They also need to **act proactively** on that context.



THE TOOLKIT

The **Pendo Agent Toolkit** connects your product data to any agent, so it can act proactively.

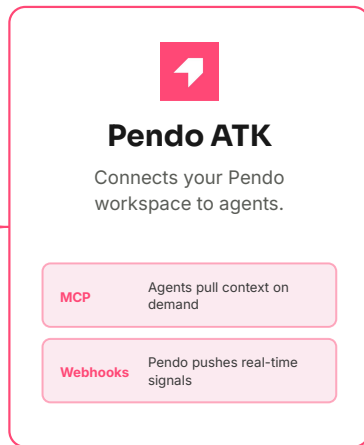
YOUR PRODUCT DATA

 **Page and feature visits**

 **Customer feedback**

 **Usage & retention**

 **Drop-off**



WHAT AGENTS DO WITH IT

 **Surface real-time guidance**
Serves the right walkthrough in the moment

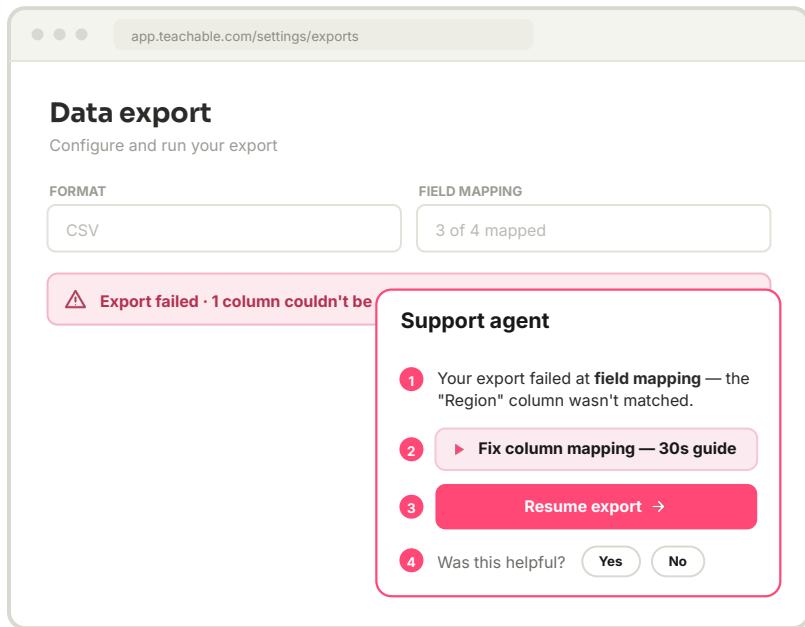
 **Trigger in-the-moment help**
Acts before friction turns into churn

 **Initiate growth & churn saves**
Flags risk early, routes expansion plays

 **Drive workflow completion**
Proactive nudges, so users finish what they start

 **Collect & triage feedback**
Flows into Pendo Listen — the loop closes

Power your agents to step in the moment frustration is detected



WHAT JUST HAPPENED

- 1 Detect the frustration**
Rage clicks, dead clicks, errors are detected in real-time by the agent.
 - 2 Understand the context**
It pulls the journey context and what they already tried — so it knows exactly where they got stuck, and what they were likely to do next.
 - 3 Act in the moment**
Surfaces tailored guides and nudges them back into the workflow, before they give up. .
 - 4 Record the outcome**
Feedback flows back into Pendo, so negative sentiment is never missed by the teams that need to hear it.
- 🔄 **A closed loop, where every moment makes the next one smarter.**



teachable

From reactive to proactive

Teaching Fin to reach out first — a Pendo x Teachable story

What is teachable?

A platform creators use to build, sell, and deliver online course, coaching, and digital products.

150,000+

creators & businesses
on the platform

100M+

students served on
Teachable



THE PROBLEM

New creators were getting stuck

Support was 100% reactive. We only heard from creators once they were already frustrated enough to open a ticket with us.

HOW THEY FELT

39%

of users were writing to support with a **confused sentiment**. They're willing, but they are having trouble starting.

WHERE THEY REACHED OUT

33%

of new users wrote us from the **Course Pricing page**, indicating that a sales page was a blocker to launch their product.

30%

of new users had issues on our **Payment Settings page**, even stopping before continuing on; this was a problem.



OUR ACTION GAP

We wanted to reach out before the ticket

Proactive support was a goal for Q2

We already knew that we wanted to find and help these users get to launch, but the question was how to reach out.

But our AI agent could only react

Fin could answer once a user wrote in, but it couldn't act. It only responded to creators who already knew to ask, never to someone stuck and silent.

The missing piece

A signal for when a creator was struggling right now, inside the product, not after they'd already given up and written in.



HOW IT WORKS

Pendo detects friction → Fin reaches out



How it works

Trees of New York

Home

General

Payments

Taxes

Notifications

Plan

Billing

Earn Credit

Webhooks

API Keys

OAuth Apps

Roles

Kathleen J Ross

Global settings

Website

Courses

Basic school information

Add basic information about your school and business to make sure students see the correct information on your website, in receipts and in emails.

School name ⓘ

Trees of New York

EC

Business name ⓘ

Nothing set

Edit

Reply to email ⓘ

kathleen.ross@teachable.com

Edit

Email sender name ⓘ

Kathleen J Ross's School

Edit

Mailing address ⓘ

Nothing set

Edit

School status

SCHOOL IS ONLINE

In order to make your school fully accessible to students, it needs to be online.

SETTING

DESCRIPTION

What it's doing so far

Live since May 27, 2026. Brand-new data, no existing baseline

67.2%

Resolved by Fin

61.6% assumed + 5.6% confirmed,
vs. 54% automation rate across Support

91%

Never Escalated

Only 9% needed a human
teammate

4.10 / 5

Avg. CX Score

On conversations Sunny
closed solo

38%

Open Rate

2,350 creators opened Sunny's
proactive message

vs. 9-12% on our previous onboarding pop-up

6%

Reply Rate

486 creators replied directly
to Sunny

vs. 1-2% on our previous onboarding pop-up



REAL USER EXAMPLES

Quick answers

Having trouble with...?

Because Pendo has context, Fin's initial message is more specific, and it understands where the user is in the platform.

The screenshot shows a mobile app interface with a chat window. At the top right, there are icons for signal strength, a grid, a menu, a camera, and a profile. The chat window has a light blue header with the text "Having trouble with this lesson page right now? What were you trying to do when things started looping?" and a "Seen • 1mth" status. Below this is a user message in a light yellow bubble: "can you show me how to lock each module? before continuing to the next module". The user message includes two tags: "plan_builder" and "account-age<60-days", and a "1mth" timestamp. To the left of the user message is a pink circle with a white "P". Below the user message is an AI-generated answer in a light blue bubble. The answer starts with "AI Answer" and provides instructions on how to lock modules in the Pendo platform. It includes a "Source" section with two links: "Course Compliance" and "Create and Set Up Your Course". At the bottom right of the answer bubble is an "Improve answer" button and a "1mth" timestamp. A small avatar icon is visible at the bottom right of the chat window.

Having trouble with this lesson page right now? What were you trying to do when things started looping?

Seen • 1mth

can you show me how to lock each module? before continuing to the next module

plan_builder account-age<60-days

1mth

AI Answer

To confirm, do you want students to be blocked from moving to the next module until they finish everything in the current module (sequential order)?

If yes, turn on **Course Compliance** in your course settings: go to **Information** → **Course settings** → **Course Compliance**, then enable **Enforce lesson order** (this forces students to complete lessons in the order they appear).

A couple things to know: students must click **Complete and continue** inside each lesson to mark it complete, and if you also enable **Enforce video watching** or **Enforce quiz completion**, those will also lock progress until met.

Source

[Course Compliance](#)

[Create and Set Up Your Course](#)

Improve answer

1mth

REAL USER EXAMPLES

Sensitive topics

A user asked about their pending domain status, a time-sensitive (and emotionally sensitive) topic that can cause users a lot of stress.

They got an instant answer from Fin before anything had to escalate.

The screenshot shows a chat window with a top bar containing icons for signal strength, a grid, a menu, a chat bubble, and a 'Re-open' button. The chat history includes a blue system message: 'Looks like this page is being stubborn—what were you trying to get done when things started acting up?' with a 'Seen • 21d' status and a bot avatar. Below this is a yellow user message: 'Can I get a hand about this: h. .net Pending. Come back later to check status.' with tags 'plan_builder' and 'account-age<60-days', a '21d' timestamp, and a yellow 'H' icon. The chat then shows a blue 'Answer' message from the bot. The answer text reads: 'That "Pending. Come back later to check status" message is normal while your custom domain is verifying - it can take up to an hour, and SSL can take up to 30 minutes to generate after you add the domain in **Site > Domains**. If it's been longer than an hour, try:'. This is followed by a bulleted list: '• Delete and re-add the domain in **Site > Domains** to re-verify.', '• If you use Cloudflare, make sure the CNAME is set to **DNS only** (not proxied) during verification.', and '• Clear your browser cache and refresh, or try an incognito window.' Below the list, the text says: 'Quick check so I don't send you down the wrong path: is happybitescr.net your custom domain, and have you already added it in **Site > Domains**?'. An inset image shows the 'Domains' management page with a table containing two entries: 'thesweetshop.teachable.com' with a 'PRIMARY' tag, and 'exampleschoolURL.com' with a 'Verified' status. A red arrow points to the 'Add Domain' button in the top right of the page. At the bottom of the chat, there is a 'Reply' section with the text 'Hi there!' and a partially visible message: 'We wanted to share a quick update on the platform outage that began earlier today'.

Looks like this page is being stubborn—what were you trying to get done when things started acting up?

Seen • 21d

Can I get a hand about this: h. .net Pending. Come back later to check status.

plan_builder account-age<60-days

21d

Answer

That "Pending. Come back later to check status" message is normal while your custom domain is verifying - it can take up to an hour, and SSL can take up to 30 minutes to generate after you add the domain in **Site > Domains**.

If it's been longer than an hour, try:

- Delete and re-add the domain in **Site > Domains** to re-verify.
- If you use Cloudflare, make sure the CNAME is set to **DNS only** (not proxied) during verification.
- Clear your browser cache and refresh, or try an incognito window.

Quick check so I don't send you down the wrong path: is happybitescr.net your custom domain, and have you already added it in **Site > Domains**?

Domains

DOMAIN NAME	
thesweetshop.teachable.com	PRIMARY
exampleschoolURL.com	✓ Verified

Make Primary Redirect

Reply

Hi there!

We wanted to share a quick update on the platform outage that began earlier today

REAL USER EXAMPLES

“Feature, not a bug”

In support operations, you probably have a perennially misunderstood feature, that users think is a bug.

For Teachable, that's reserves.

In this use case, a user got an immediate and accurate explanation about why money was withheld.

The screenshot shows a support chat interface. At the top, a status bar includes a signal strength icon, a grid icon, a three-dot menu, a mail icon, and a "Re-open" button. The chat history shows a message from the user: "Looks like you navigated to the Reserves section but turned back pretty quickly. What were you trying to find there?" with a timestamp of "Seen • 1d" and a user avatar. Below this, a system message states: "It says \$864.83 total withheld reserves" with filters for "plan_builder" and "account-age<60-days" and a timestamp of "1d". The support agent's response, labeled "Answer", explains that the \$864.83 is the amount currently being held back as reserves (Teachable Pay only) and that reserves are held to cover possible refunds, chargebacks, or fraudulent charges, and they get released on a delayed schedule. The agent asks for confirmation of the user's intent. Below the text is a screenshot of the Teachable "Reserves" page. The page has a sidebar with a "Reserves" link highlighted in a red box. The main content area shows a summary with "TOTAL WITHHELD RESERVES" of \$9,000.00 and "RESERVES UNLOCKED TODAY" of \$0.00. Below this is a table with columns for "DATE", "RESERVES UNLOCKED", and "UNLOCKED AMOUNT". The table contains four rows of data for dates from 2022-04-22 to 2022-04-25. At the bottom of the chat, there is a "Reply" button and a message from the support agent: "Hi there! We wanted to share a quick update on the platform outage that began earlier today."

Looks like you navigated to the Reserves section but turned back pretty quickly. What were you trying to find there?

Seen • 1d

It says \$864.83 total withheld reserves

plan_builder account-age<60-days

1d

Answer

That \$864.83 is the amount currently being held back as **reserves** (Teachable Pay only). Reserves are held to cover possible refunds, chargebacks, or fraudulent charges, and they get released on a delayed schedule, so they won't show up in your payout right away.

To confirm, would you like to know more about why that number is \$864.83 (for example, which transactions it's tied to and when it will unlock), or are you mainly trying to understand why your payout is lower than your earnings?

Reserves

Export CSV

\$9,000.00
TOTAL WITHHELD RESERVES

\$0.00
RESERVES UNLOCKED TODAY

DATE	RESERVES UNLOCKED	UNLOCKED AMOUNT
2022-04-22	0	\$0.00
2022-04-23	0	\$0.00
2022-04-24	4	\$26.12
2022-04-25	40	\$249.71

Reply

Hi there!

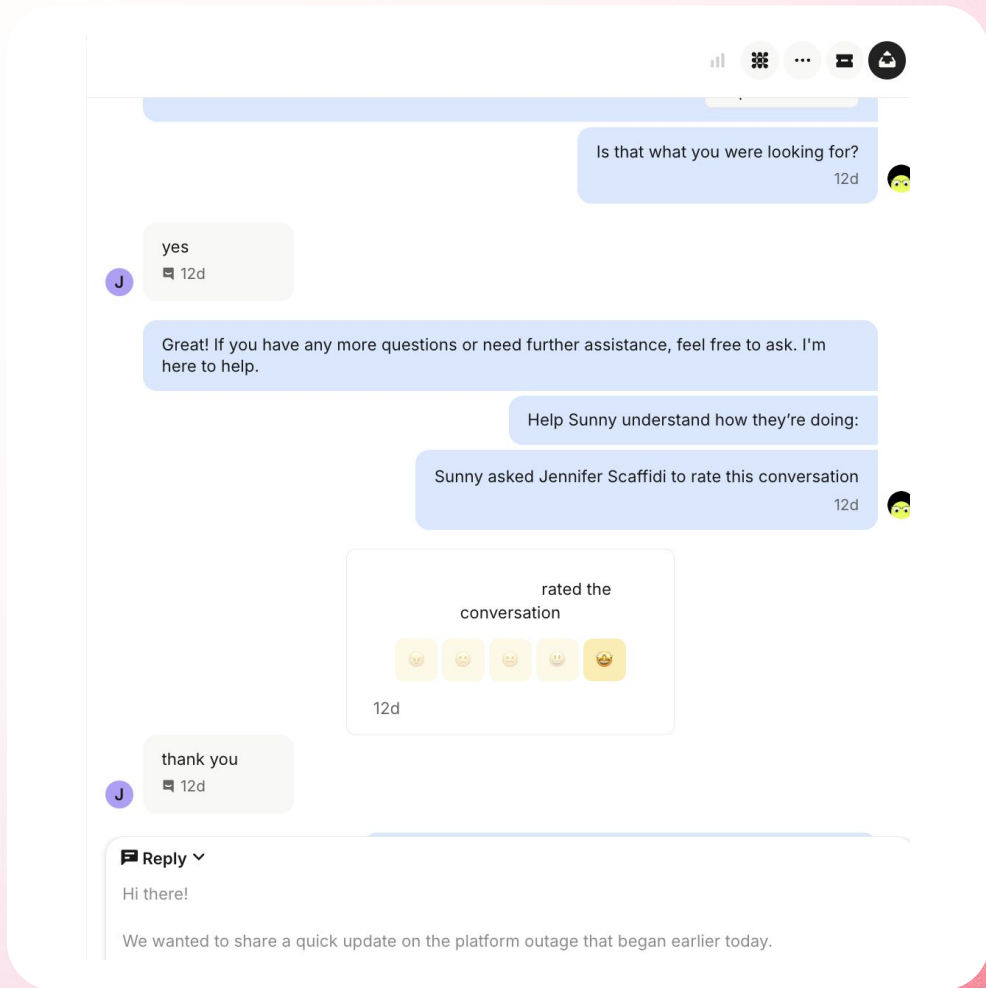
We wanted to share a quick update on the platform outage that began earlier today.

REAL USER EXAMPLES

5-star rating

The user asked how to delete students from a course, received exact steps, and confirmed the fix worked.

Then, they not only rate the chat, they also thanked Fin for the help.



Where we're taking this

Expand the trigger pages

We initially focused on specific pages — Course Pricing, Payment Settings, and Course Setup — the three pages we identified as the biggest early blockers. We'll slowly release to all pages.

Expand the audience

New users were a good first target, since we have a solid idea of what they need to accomplish, but we can begin to target existing users for greater feature adoption.

Explore more integrations with Pendo

We've been so pleased that next we want to try a workflow follow-up trigger, especially for complex onboarding, such as when a user is setting up Stripe in order to get paid.

More context & better resolutions

Since enabling Pendo context via a data connector, conversations with in-platform context go better for Fin

WITH PENDO CONTEXT

1,100 conversations

70%

Resolution rate

17%

Escalated to a human

WITHOUT PENDO CONTEXT

2,200 conversations

62%

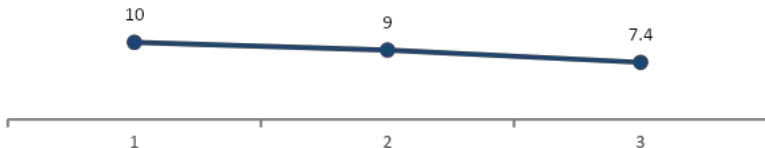
Resolution rate

24%

Escalated to a human

+8 pts resolution and -7 pts escalation when Fin has context from Pendo

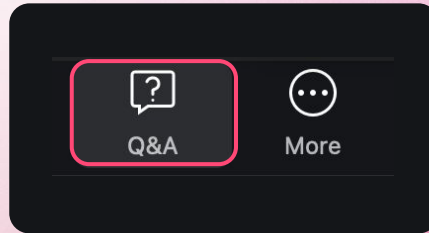
RESOLUTION-RATE LIFT, WEEK OVER WEEK



Averaging ~9 points higher resolution when Pendo is involved.

Q&A

Drop your questions in the
Zoom Q&A box.



Keep learning



Get a custom demo of
Pendo for Salesforce



Get certified in
Digital Adoption

