

Amanda Bridge

# The Pendo COE

How to create and roll out a scalable in-app messaging solution

P E N D O  
M ● N I U M 1 9

# What you'll learn

- Who am I, and why am I here?
- Why is thinking strategically about your in-app messaging solution (Pendo) so important?
- What is a Center of Excellence (COE)?
- How do you build a COE?
- How do you roll out a COE to your company?
- Q&A



# Amanda Bridge

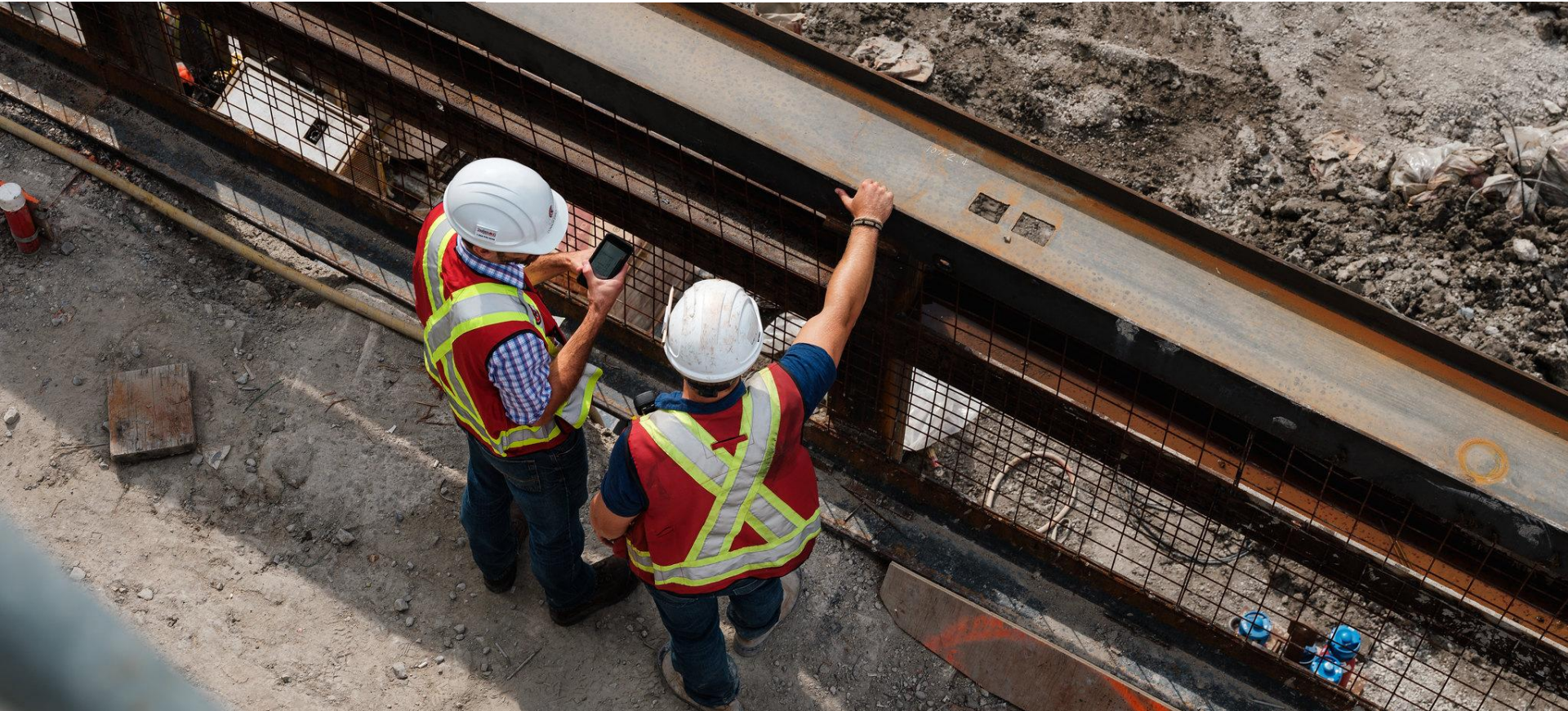
UX Content Writer | Procore Technologies



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UX Content Writer | Procore Technologies

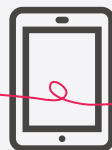
# PROCORE<sup>®</sup>





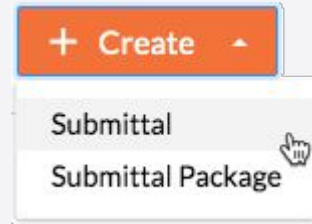
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**UX Content Writer** | Procore Technologies





# Amanda Bridge





## Amanda Bridge

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**My journey with Pendo made me question everything I thought I knew about in-app messaging.**

**Why is thinking strategically about your  
in-app messaging solution so important?**

UNLIMITED ACCESS SALE!

# Los Angeles Times

\$1 for 3 MONTHS Sale ends 8/1

JULY 30, 2019

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TOP NEWS

## Trump's tax returns required under new California election law

President Trump, and any White House hopeful unwilling to disclose their tax returns, will be ineligible for California's 2020 ballot under a law signed by Gov. Gavin Newsom.

1 hour ago

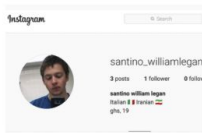


## Disturbing portrait emerges of Gilroy Garlic Festival shooter

More Coverage

Gilroy festival shooter obtained 'weapons of goddamned mass destruction,' Newsom says

Full coverage of Gilroy Garlic Festival shooting



## In a blow to the bullet train, California

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SPECIAL SALE ONLY \$1 FOR 3 MONTHS

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## Kidnapping suspect arrested after hours-long standoff with police in downtown L.A.

2 hours ago

## Tipster's email led to arrest in massive Capital One breach

## AT&T renames DirecTV streaming service AT&T TV Now

1 hour ago

## Hiltzik: Incredibly, GOP senators are demanding another tax cut for the rich

1 hour ago



## Tucker fire explodes to 13,000 acres, becomes largest blaze on national

Direct link to California fire news

OPINION >

## Opinion: The Gilroy Garlic Festival killings weren't the only U.S. gun deaths on Sunday

38 minutes ago

## Column: Cancel the congressional impeachment show before it gets Trump reelected

July 30, 2019

## Editorial: Protecting American elections from sabotage is apparently now a partisan issue

July 30, 2019

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## After riots again engulf L.A. in 1992, Big Willie Robinson plots a comeback

How we uncovered the legend of Big Willie Robinson

Join the community on Facebook

UNLIMITED ACCESS SALE!

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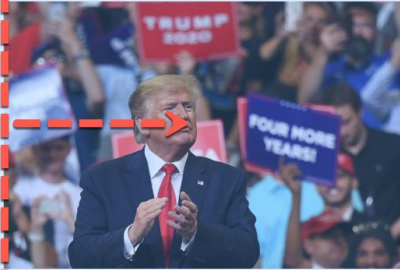
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1 hour ago



## Disturbing portrait emerges of Gilroy Garlic Festival shooter

More Coverage  
Gilroy festival shooter obtained suspension of residential lease

Instagram



santino\_williamlegan

3 posts · 1 follower · 9 following

California · Gilroy, California

Follow



## Kidnapping suspect arrested after hours-long standoff with police in downtown L.A.

2 hours ago

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1 hour ago

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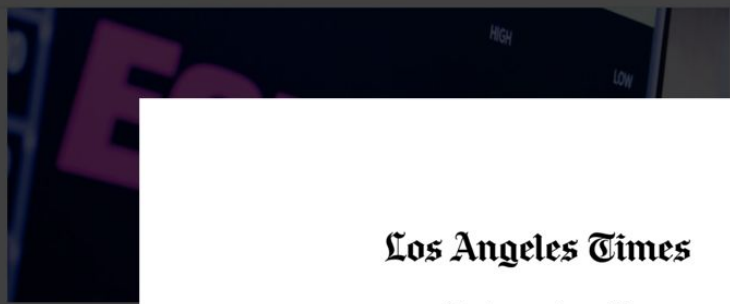
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BUSINESS

Southwest dumps Newark airport as Boeing 737 Max problem continues



With its up to \$700-m... data breach won't sut

By DAVID LAZARUS

At first glance, for privacy scre

Equifax agreed investigations i million people.

Facebook was s Commission ov Facebook users

Here's the

thing, though. A quick crunching of the numbers reveals that Equifax is  
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Special Sale

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# Los Angeles Times

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## THE NEWS YOU NEED

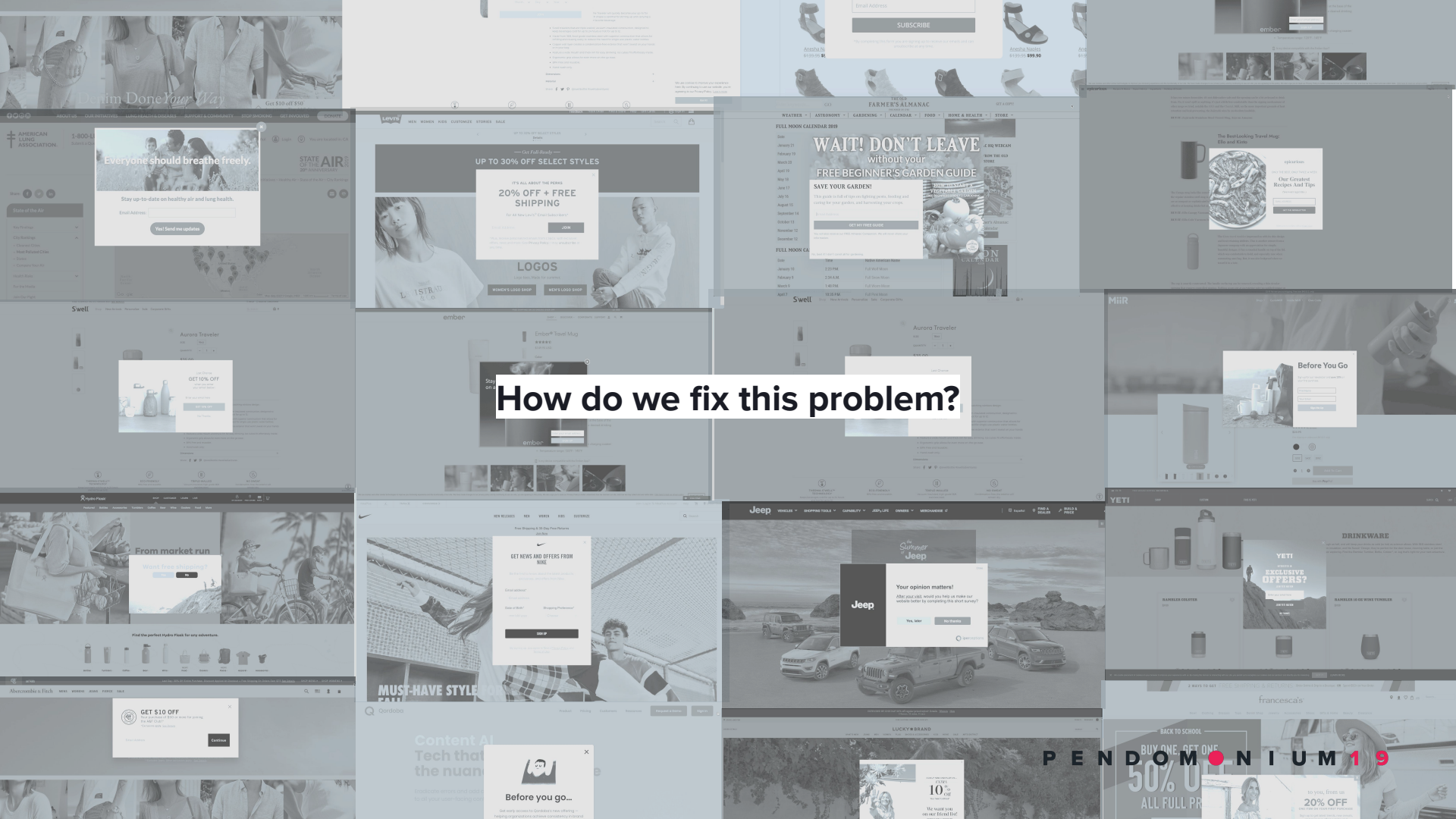
Get Breaking News Alerts delivered FREE to your inbox

**GET THE NEWS I NEED** ➔

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# How do we fix this problem?

P E N D O M N I U M 1 9



The Solution

# Create a Center of Excellence

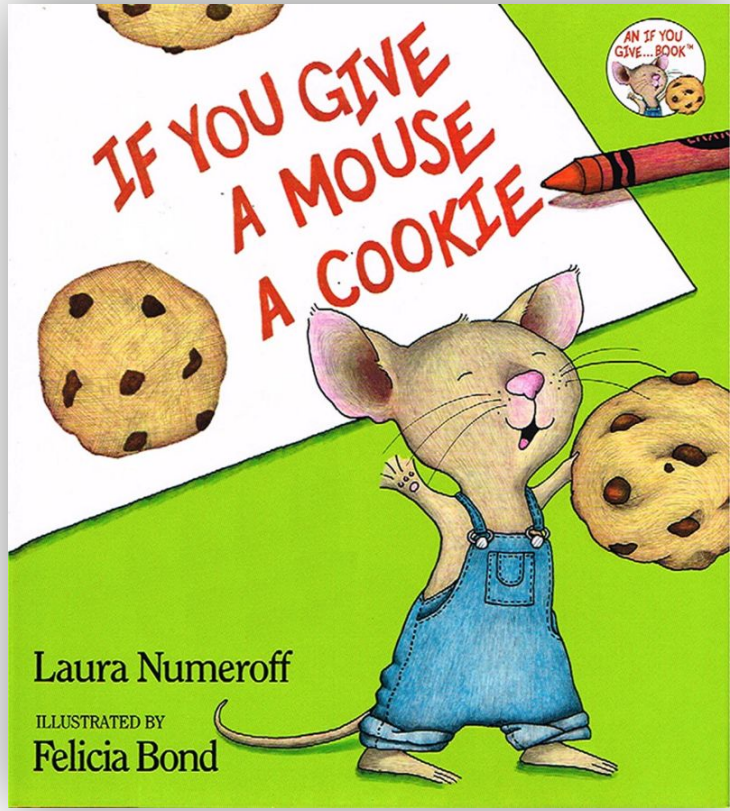
What is a Center of Excellence?

**Documented guidelines on how to drive the consistency, scalability, and effectiveness of in-app messaging at your company.**



**PROCORE**

**PENDO CREATOR'S GUIDE**



Laura Numeroff

ILLUSTRATED BY  
Felicia Bond



CORE pendo-guidelines



## Creator's Guide

Overview

Create

Types of Pends

Glossary

Appendix

Case Study

## Decision Tree

## Design & Content Guide

## Knowledgebase

## About the Pendo Resources

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How do **you** create a COE?

# How to create a Pendo COE

1. Audit/Research
2. Meet with all stakeholders
3. Create a cross-departmental strike team
4. Build it
5. Roll it out

Step 1

## Audit / Research





# Audit



# Content differences



**New: Financial line items that are non-budgeted will now appear on the Budget with a "?" next to them.**

Example:

Click **Next** to see what else is new.

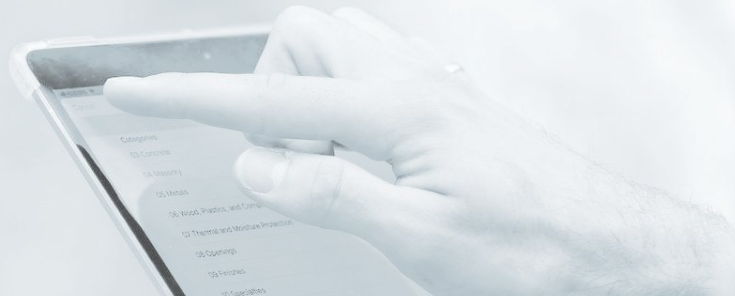
## Introducing Drawing Statuses!

Drawings in your project now have two drawing statuses: Unpublished and Published.

All newly uploaded drawings are unpublished until an 'Admin' user publishes them. **Now you can upload unpublished drawings to Procure while you get pricing and approval or collaborate on the designs.** Once you publish, the current set is updated, and the drawings become available to your team on mobile and web.

More information: [What is the unpublished status on drawings?](#)

# Design differences



## ***Coming Soon! Usability Improvements & Sidebar Removal for Submittals Tool***

As part of a usability improvement effort, Procore is planning to remove the right sidebar from the Submittals tool to make room for future enhancements. Existing functions will not be affected by this change—simply moved to a different place. This usability update is planned for deployment later this month.

[Learn More](#)



**Coming Soon to Submittal Reports:** Adding the ability to group by Approver and Ball in Court, as well as adding their respective date fields.

[Register for the webinar](#)



**Coming Soon:** New workflow for Procore's Punch List tool! The new Punch List workflow will feature additional statuses, new roles, and an activity feed for increased efficiency and accountability.

[Learn More](#)



# Guide creation was rushed





Reports > Enter Report Name

Enter Report Name 

Enter Description 


Cancel

Create Report

Bidding  Change Events  Add Tab

You now enter the Report Name and Description at the top of the page

# We couldn't easily internationalize



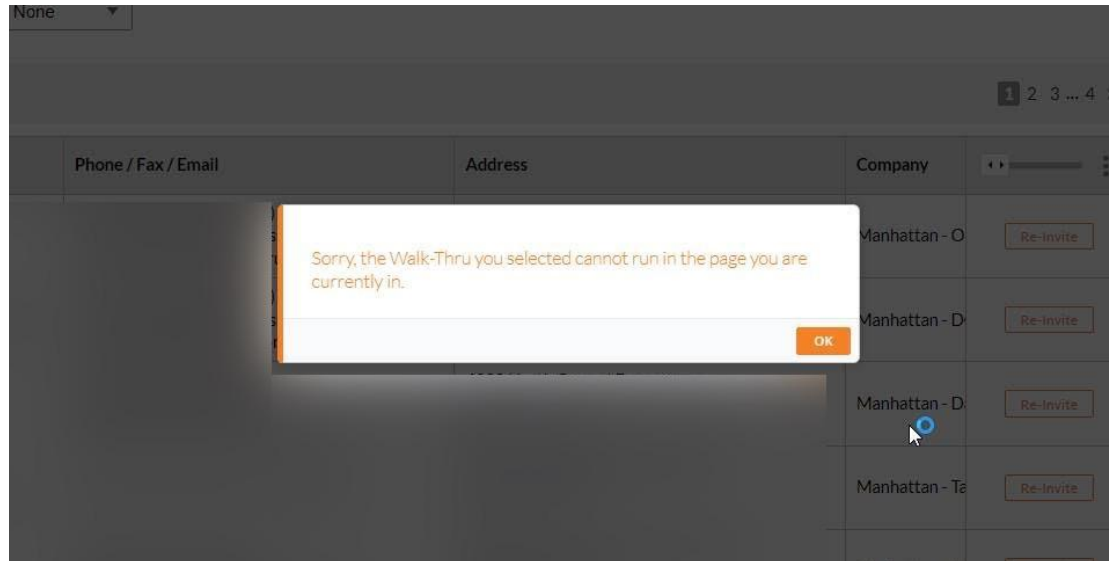
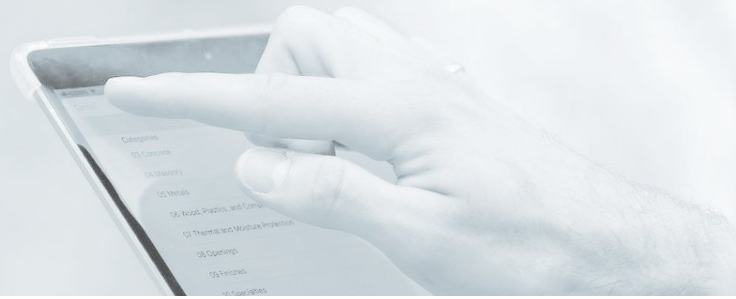
**Commitments** Commitments List (2) Billings

**New! Show Subcontractor Claimed Amounts and Create Payment Schedules**

You can now enable subcontractor claimed amounts and other features via a setting in Commitments configuration.  
[Learn More \(US\)](#) | [Learn More \(ANZ\)](#)

Australia and New Zealand clients can now create payment schedules.  
[Learn More \(US\)](#) | [Learn More \(ANZ\)](#)

# Guides broke



# Nothing was consistent, and our customers noticed

**You can now bulk create budget modifications!**  
By clicking + Add Line Item, you can create up to seven budget modifications at one time. [Learn More](#)

**New! Show Subcontractor Claimed Amounts and Create Payment Schedules**  
You can now enable subcontractor claimed amounts and other features via a setting in Commitments configuration. [Learn More \(US\)](#) | [Learn More \(ANZ\)](#)

**New! Daily Log Completion Report**  
You can now view a consolidated report of your project's daily log to see which days have been completed and by whom. Navigate to the Reports tool from your toolbar, click Create Report, and select Daily Completion Report. [Learn More](#)

**You can now create multiple prime contracts for a project.** [Learn More](#)

**Australia and New Zealand clients can now create payment schedules.** [Learn More \(US\)](#) | [Learn More \(ANZ\)](#)

**Introducing Drawing Statuses!**  
Drawings in your project now have two drawing statuses: Unpublished and Published. All newly uploaded drawings are unpublished until an 'Admin' user publishes them. Now you can upload unpublished drawings to Procure while you get pricing and approval or collaborate on the designs. Once you publish, the current set is updated, and the drawings become available to your team on mobile and web. More information: [What is the unpublished status on drawings?](#)

**Bidder Search Redesign**  
Welcome to the new and improved bidder search page! Functionality hasn't changed, but we made it easier to search for your bidders. [Learn More](#)

**New! Financial line items that are non-budgeted will now appear on the Budget with a "?" next to them.**  
Example: 01-010 - Project Manager: Labor (?)  
Click Next to see what else is new.

**You now enter the Report Name and Description at**

**CONFIRM NEW DRAWING INFORMATION FOR VORTEX FIRST REVS**  
1 of 77 confirmed [Confirm All](#)  
A001 COVER SHEET VIEWED  
A002 GENERAL INFORMATION  
A003 DISSEMINATION PLANS  
A100  
[Learn More](#)

**Tip! Confirm only selected drawings**  
Hold SHIFT (Mac) or CONTROL (Windows) to select multiple drawings, then click the Confirm Selected button. [Learn More](#)

**Coming Soon: New workflow for Procure's Punch List tool!** The new Punch List workflow will feature additional statuses, new roles, and an activity feed for increased efficiency and accountability. [Learn More](#)

**Coming Soon: Budget Admin users will have the option to unlock the Budget and preserve Budget Modifications.** [Learn More and Review Budget Permission Updates](#)

Takeaway

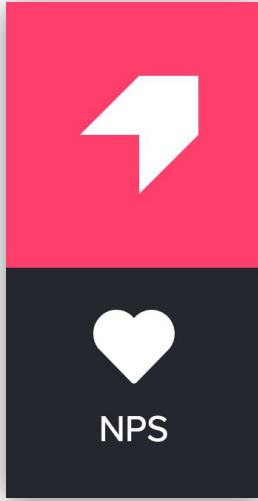
**Pendo needs to be an integral part of your  
product's UX**





# Research





Poll Response ×

**Guide Name:** NPS (December 2018)

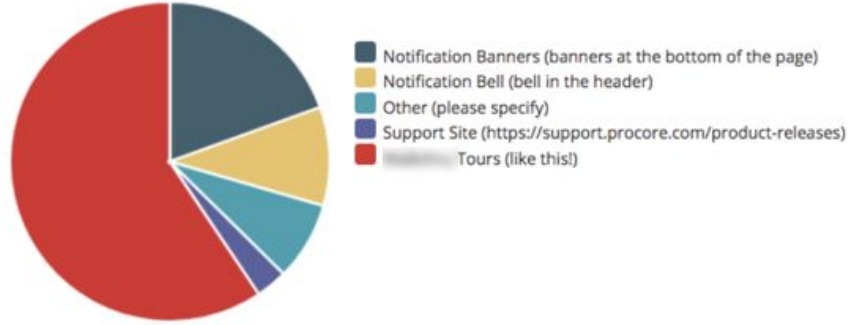
**Poll Question:** Score-based Follow-up Response

**Response:** The interface is difficult to navigate. This requires users to be able to pop up and interrupt what work they are doing. Leave users alone long enough to actually use your product.



Q1: WHAT IS THE BEST WAY TO INFORM YOU OF NEW FEATURES THAT ARE ADDED TO PROCORE?

---



Takeaway

**Inform users of changes contextually, but  
leave them alone long enough to actually  
use your product**



Step 2

## Meet with All Stakeholders



Step 3

## Create a Cross-departmental Strike Team





**User Experience Design**

**Marketing Visual Design**

**Sales**

**Product Marketing**

**UX Content**

**UI Design**

**QA**

**Engineering**

**Product Management**

Baum.com Construction  
Hotel California

Project Tools  
Home

PROJECT HOME

PROJECT ADDRESS  
address test  
Carpinteria, California  
United States

PROJECT TEAM

Role	Name	Email

PROJECT OVERVIEW

Overview	Total Open
RFIs	33
Submittals	257
Schedule	473
Inspections	1
Observations	1
Punch List	2
Meetings	12
Tasks	5

Welcome to Your Procore Trial

Skip Start tour

Minimize Sidebar

Help

Step 3

## Create a Cross-departmental Strike Team



QA

UX/UI Design

UX Research

Product Management

Product Marketing

Brand Marketing

Engineering

Customer Success

Technical Writing

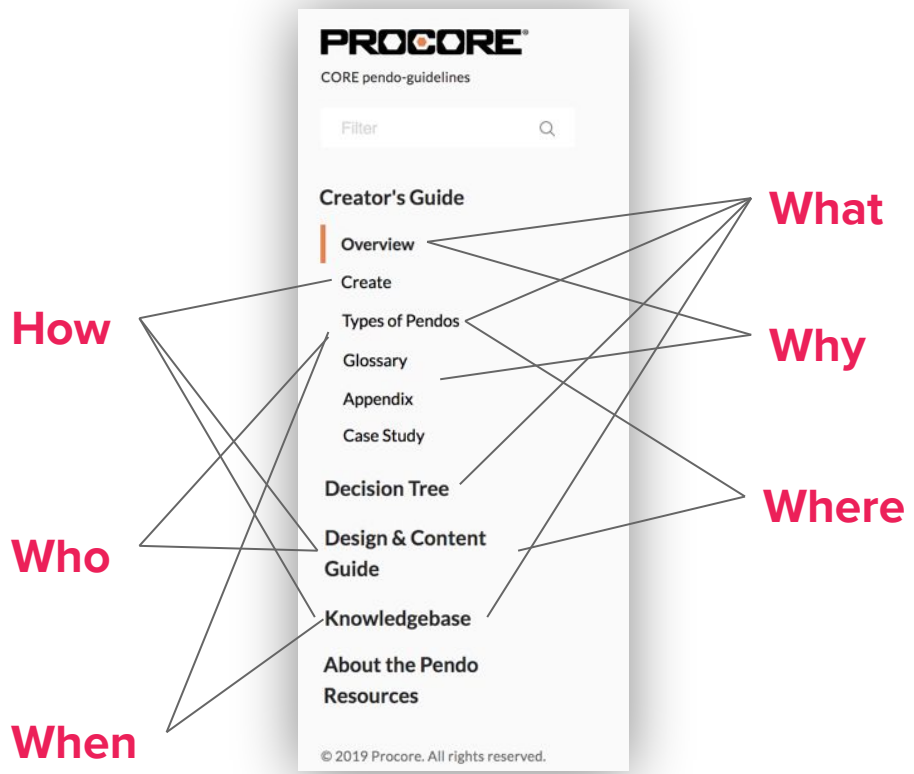
UX Content





Step 4

**Build**





## The Center of Excellence

### What

What information will you use Pendo to communicate?  
What information will you NOT use Pendo to communicate?

### Why

Why are you sending out each type of communication?  
Why are you NOT sending out each type of communication?

### Where

Where will you display each type of communication?  
Where will you NOT display each type of communication?

### When

When will you display each type of communication?  
When will you NOT display each type of communication?

### Who

Who will you target to receive each type of communication?  
Who will you NOT target to receive each type of communication?

### How

How will each type of Pendo look?  
How will each type of Pendo sound?  
How will each type of Pendo be built internally?



## The Center of Excellence

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**What** is Pendo not used  
for in your product?

Marketing / sales communication that does not have to do with the user's immediate product or workflow

Information that benefits fewer than 10 clients

Information that a user might need to reference more than once



**What** information will be most effective in your app as Pendo guides / tooltips?

New feature announcements

New feature support

App updates

Product tours

Product surveys

NPS

Product usage tips

Terms & Conditions changes

Maintenance/outage warnings

Alerts / Warnings

User onboarding

Trial support



**What** information will be most effective in your app as Pendo guides / tooltips?

### New Features

- New feature announcements
  - New feature support
  - App updates
  - Product tours
  - Product surveys
- NPS** NPS

### Informational

- Product usage tips
  - Terms & Conditions changes
  - Maintenance/outage warnings
  - Alerts / Warnings
- User onboarding** Onboarding
- Trial support** Trial



## Types of Communication

### New Feature

- + Announcement tooltip
- + Onboarding guide
- + Survey

### NPS

### Informational

- + Maintenance/outage
- + Product usage tips
- + Informational

### Onboarding

- + Product tour
- + Survey

### Trial

- + Product tour
- + Survey





## The Center of Excellence

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Takeaway

**Find the middle ground between your  
business goals and your users' goals**





## Types of Communication

### **New Feature**

- + Announcement tooltip
- + Onboarding guide
- + Survey

### **NPS**

### **Informational**

- + Maintenance/outage
- + Product usage tips
- + Informational

### **Onboarding**

- + Product tour
- + Survey

### **Trial**

- + Product tour
- + Survey



## NEW FEATURE MESSAGING

### Business Goals

Increase adoption

Decrease support tickets

Increase revenue

### User Goals

Learn about new feature

Quick time to value

Low immediate learning curve

Pendo and new feature is beneficial  
and not interruptive to their current  
workflow



## NEW FEATURE MESSAGING

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Increase revenue

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Low immediate learning curve

Pendo and new feature is beneficial  
and not interruptive to their current  
workflow

**Non-invasive**

**Allows users to keep interacting with  
their current page**

**Easy access to more information**

**Explains both the “what” and the “why”  
for immediate ROI**

**Noticeable**



## NEW FEATURE MESSAGING

### Business Goals

Increase adoption

Decrease support tickets

Increase revenue

### User Goals

Learn about new feature

Quick time to value

Low immediate learning curve

Pendo and new feature is beneficial  
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workflow

**Contextual tooltip for smaller features**

**Contextual onboarding guide with a  
lightbox for features with a higher  
impact**



## Types of Communication

### **New Feature**

- + Announcement tooltip
- + Onboarding guide
- + Survey

### **NPS**

### **Informational**

- + Maintenance/outage
- + Product usage tips
- + Informational

### **Onboarding**

- + Product tour
- + Survey

### **Trial**

- + Product tour
- + Survey



## Types of Pendoros

### New Feature

- + Announcement **tooltip**
- + Onboarding **guide with lightbox**
- + **Survey**

### Informational

- + Maintenance **banner**
- + Product usage **tooltip**
- + Product usage **guide**
- + Informational **banner**
- + Informational **tooltip**
- + Informational **tooltip**

### Onboarding

- + Product tour **guide**
- + **Survey**

### Trial

- + Product tour **guide**
- + **Survey**

### NPS





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## Where

Do you not want to show surveys on create or checkout pages?

Do you want to only show new feature announcements on the page where the new feature appears?

Do your users respond better to data collection Pendo's on certain pages like the home page?

## When

Are certain communications more effective during certain times in workflows than others?

Do you want to show surveys at the beginning or the end of a certain workflow?

## Who

Do you want to show new feature Pendo only to users who have used your app more than 30 days?

Do you need to target different types of Pendo's to users with a specific permission in your product?



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Do you want to show surveys at the beginning or the end of a certain workflow?

## Who

**Do you want to show new feature Pendo only to users who have used your app more than 30 days?**

**Do you need to target different types of Pendo's to users with a specific permission in your product?**



## The Center of Excellence

### What

What information will you use Pendo to communicate?  
What information will you NOT use Pendo to communicate?

### Why

Why are you sending out each type of communication?  
Why are you NOT sending out each type of communication??

### Where

Where will you display each type of communication?  
Where will you NOT display each type of communication?

### When

When will you display each type of communication?  
When will you NOT display each type of communication?

### Who

Who will you target to receive each type of communication?  
Who will you NOT target to receive each type of communication?

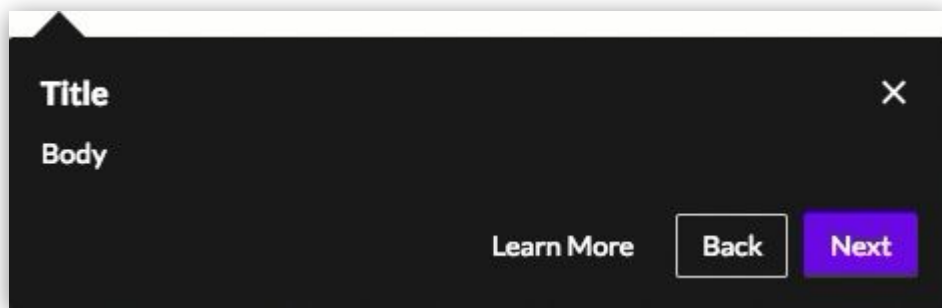
### How

**How will each type of Pendo look?**  
How will each type of Pendo sound?  
How will each type of Pendo be built internally?



Design **how** each type of Pendo should look.

Then, build templates in Pendo for your team to use.





## The Center of Excellence

### What

What information will you use Pendo to communicate?  
What information will you NOT use Pendo to communicate?

### Why

Why are you sending out each type of communication?  
Why are you NOT sending out each type of communication?

### Where

Where will you display each type of communication?  
Where will you NOT display each type of communication?

### When

When will you display each type of communication?  
When will you NOT display each type of communication?

### Who

Who will you target to receive each type of communication?  
Who will you NOT target to receive each type of communication?

### How

How will each type of Pendo look?  
**How will each type of Pendo sound?**  
How will each type of Pendo be built internally?





Create content guidelines around **how** you will communicate with your users.

Content principles

Content patterns for each type of Pendo

**New! Name of Feature In Title Case And No Punctuation** X

You will now see X feature ...  
or  
Now, you can use X feature ...  
or similar

**Explain what the feature is and why it's useful for the user.**

**Use punctuation in the body of the tooltip.**

[Learn More](#)



## The Center of Excellence

### What

What information will you use Pendo to communicate?  
What information will you NOT use Pendo to communicate?

### Why

Why are you sending out each type of communication?  
Why are you NOT sending out each type of communication?

### Where

Where will you display each type of communication?  
Where will you NOT display each type of communication?

### When

When will you display each type of communication?  
When will you NOT display each type of communication?

### Who

Who will you target to receive each type of communication?  
Who will you NOT target to receive each type of communication?

### How

How will each type of Pendo look?  
How will each type of Pendo sound?  
**How will each type of Pendo be built internally?**



# Procore's Pendo Creation Process

**1** PREPARE

---

**2** CREATE

---

**3** TEST

---

**4** REVIEW & PUBLISH

---

**5** ANALYZE

---

**6** MAINTAIN & TEST

---

Create a creation process to guide **how** Pendor will be built to align with the COE.

**User Experience Design**

**Marketing Visual Design**

**Sales**

**Product Marketing**

**UX Content**

**UI Design**

**Product Management**

**QA**

**Engineering**

**PROJECT HOME**

Baum.com Construction  
Hotel California

Project Tools Home

Favorites

PROJECT ADDRESS  
address test  
Carpinteria, California  
United States

PROJECT WEATHER

PROJECT LINKS + New  
No links to display.

PROJECT TEAM

Role	Name	En
------	------	----

PROJECT OVERVIEW

Overview	
RFIs	
Submittals	
Schedule	
Inspections	
Observations	
Punch List	
Meetings	5
Tasks	

MY OPEN ITEMS

Item Type	Details	Status	Due Date

Procore Trial

Welcome to Your Procore Trial

Skip Start tour

Total Open

163
257
473
1
1
2
12
1

Help

Minimize Sidebar

Create a creation process to guide **how** Pendo will be built to align with the COE.

The screenshot shows a software interface for a construction project. A modal window is centered on the screen, titled "Design". The modal contains an illustration of a person in an orange safety vest sitting at a desk with a laptop, and a "Welcome to Your Procore Trial" message with "Skip" and "Start tour" buttons. Three red arrows point from the labels "Marketing", "Sales", and "Writer" to the modal window. The background interface includes a top navigation bar with "Baum.com Construction Hotel California", "Project Tools Home", and "Favorites". The main content area is divided into sections: "PROJECT HOME", "PROJECT TEAM", "PROJECT OVERVIEW", and "MY OPEN ITEMS". The "PROJECT OVERVIEW" section contains a table with various project metrics.

Overview		Total Open
RFIs		163
Submittals		257
Schedule		473
Inspections		1
Observations		1
Punch List		2
Meetings	5	12
Tasks		1



# Procore's Pendo Creation Process

**1** PREPARE

---

**2** CREATE

---

**3** TEST

---

**4** REVIEW & PUBLISH

---

**5** ANALYZE

---

**6** MAINTAIN & TEST

---



## Procore's Pendo Creation Process

- 1 PREPARE** UX Design, Product Management, Product Marketing
- 2 CREATE** UX Design, Product Management, Product Marketing, UX Content
- 3 TEST** QA
- 4 REVIEW & PUBLISH** Pendo Strike Team
- 5 ANALYZE** UX Design, Product Management, Product Marketing
- 6 MAINTAIN & TEST** UX Design, Product Management, Product Marketing



## The Center of Excellence

### What

What information will you use Pendo to communicate?  
What information will you NOT use Pendo to communicate?

### Why

Why are you sending out each type of communication?  
Why are you NOT sending out each type of communication?

### Where

Where will you display each type of communication?  
Where will you NOT display each type of communication?

### When

When will you display each type of communication?  
When will you NOT display each type of communication?

### Who

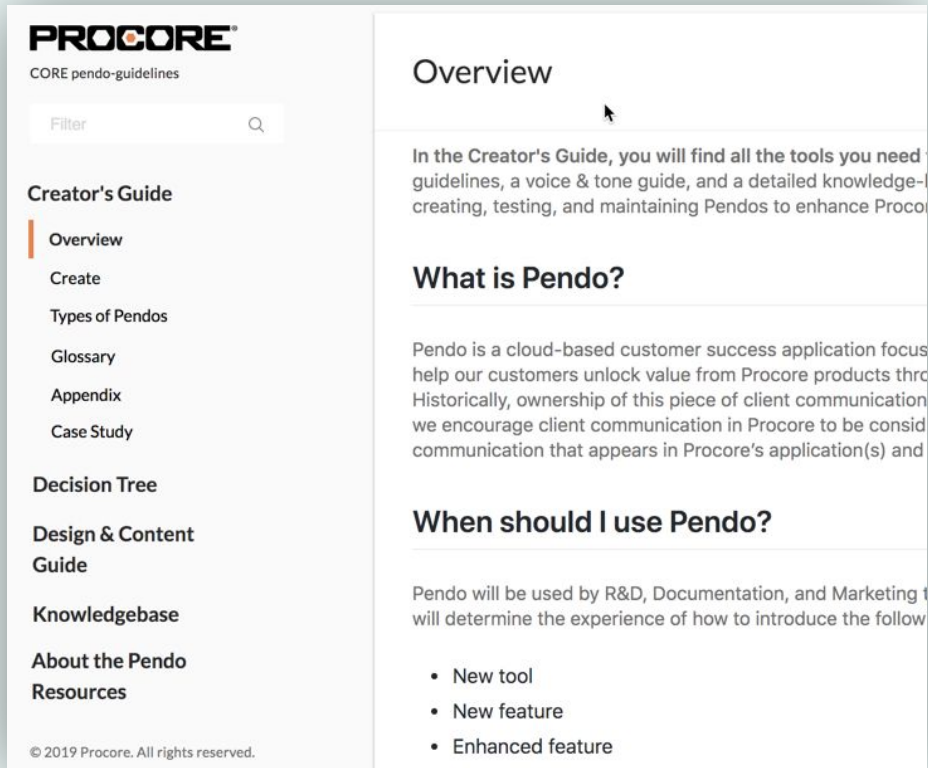
Who will you target to receive each type of communication?  
Who will you NOT target to receive each type of communication?

### How

How will each type of Pendo look?  
How will each type of Pendo sound?  
How will each type of Pendo be built internally?



# Finalize your Center of Excellence



**PROCORE**  
CORE pendo-guidelines

Filter

**Creator's Guide**

- Overview
- Create
- Types of Pendos
- Glossary
- Appendix
- Case Study

**Decision Tree**

**Design & Content Guide**

**Knowledgebase**

**About the Pendo Resources**

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## Overview

In the Creator's Guide, you will find all the tools you need to create guidelines, a voice & tone guide, and a detailed knowledge-base for creating, testing, and maintaining Pendos to enhance Procore's customer success.

### What is Pendo?

Pendo is a cloud-based customer success application focused on helping our customers unlock value from Procore products through better communication. Historically, ownership of this piece of client communication was siloed. Now, we encourage client communication in Procore to be considered a shared responsibility. Communication that appears in Procore's application(s) and is used to create, test, and maintain Pendos is managed by Pendo.

### When should I use Pendo?

Pendo will be used by R&D, Documentation, and Marketing to help them determine the experience of how to introduce the following:

- New tool
- New feature
- Enhanced feature



**Roll out your Pendo Center of Excellence**

# Roll out your Pendo Center of Excellence

Lead team trainings

Enforce your new processes

Ask for feedback, and iterate often

Communicate, communicate, communicate

Be optimistic

# Roll out your Pendo Center of Excellence

## Lead team trainings

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Lead team trainings


Enforce your new processes

Ask for feedback, and iterate often

Communicate, communicate, communicate

**Be optimistic**





**And you've got yourself a scalable, rolled out  
in-app messaging solution**

## Final Takeaway

**We can't change the whole internet, but our work can make a huge difference to our little corner of it.**



An aerial photograph of a city skyline, likely Dubai, featuring several skyscrapers. The foreground shows a multi-lane highway. The sky is hazy, and there is a thick layer of white mist or smoke at the base of the buildings. A white rectangular box with the text 'Thank you!' in red is centered over the image.

**Thank you!**

**Questions?**



Warrambool Timber Industries AS/NZS 1328  
3.6m 150x45 GL17 A Grade Slash Pine H2, Cambered  
110010 N x 1.00 (K1) P3601 249681  
Call G/N Greenisle Timbers



**P E N D O M ● N I U M 1 9**

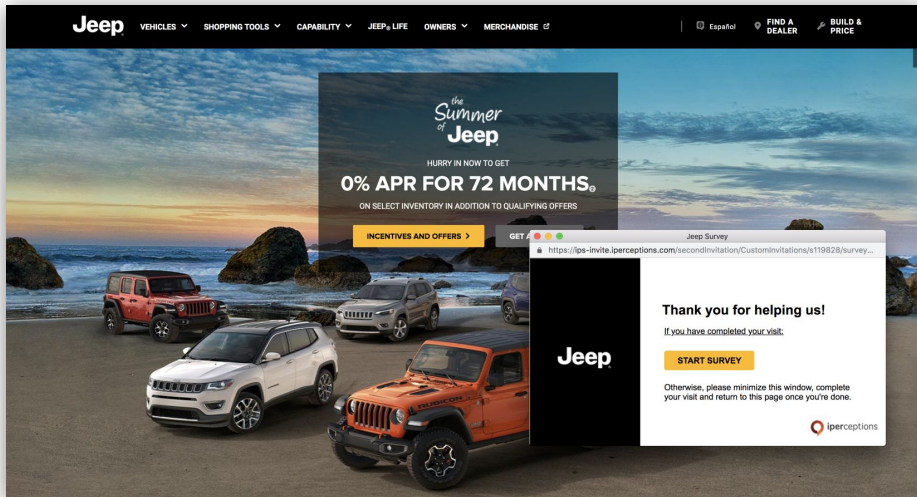
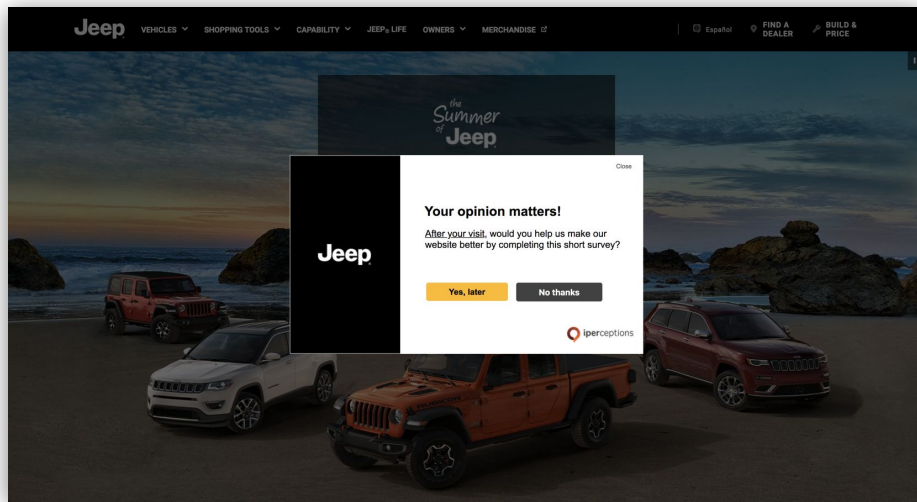
**THE CONFERENCE**

[www.pendo.io](http://www.pendo.io)

## Jeep

Waited til I was on the site for at least 30 seconds.

Respectful of my time, workflow, and current goals



H&M

Non-invasive

Allows me to keep browsing

The screenshot shows the H&M website interface. At the top, there is a navigation bar with "Customer Service", "LINDAYS", and a menu icon. The H&M logo is centered. To the right, there is a shopping bag icon and a "SIGN IN" link. Below the navigation bar, there are category links: "WOMEN", "DIVIDED", "MEN", "KIDS", "H&M HOME", "SALE", and "#HMXME". A red arrow points to a notification icon and the text "Join Loyalty for 10% off". Below this, there is a banner for "LOYALTY MEMBERS ENTER TO WIN A TRIP TO NEW YORK" with a sub-headline and a paragraph of text. Three buttons are visible: "SIGN IN", "JOIN FOR FREE", and "ENTER TO WIN". Below the banner is a large image of a diverse group of children. In the bottom right corner, there is a black cookie consent notice with a close button.

Customer Service LINDAYS ...

SIGN IN Favorites Shopping bag(0)

Your shopping bag is empty

ORDER VALUE: \$0.00

TOTAL: \$0.00

WOMEN DIVIDED MEN KIDS H&M HOME SALE #HMXME

Join Loyalty for 10% off Customer Service Find A Store

**LOYALTY MEMBERS**  
**ENTER TO WIN A TRIP TO NEW YORK**

Members see instructions on how to enter this contest in your H&M account. Contest valid through 08/25/19 for loyalty members only. Not a Member? Join now to learn more.

SIGN IN JOIN FOR FREE ENTER TO WIN

H&M uses cookies to give you the best shopping experience. If you continue to use our services, we will assume that you agree to the use of such cookies. Find out more about cookies and how you can refuse them.

## [Lululemon](#)

Opt in

Non-invasive

Feedback is more useful when it's opt in. Unsolicited feedback is often less thoughtful

The image shows a screenshot of the Lululemon website with a feedback modal open. The modal is titled "We're listening!" and contains the following elements:

- Header: "We love to sweat — even the details. Tell us what you think."
- Overall Rating\*: A 5-point scale with buttons for 1, 2, 3, 4, and 5. Below the scale, "Very Dissatisfied" is on the left and "Very Satisfied" is on the right.
- Text input field: "Tell us about your experience." with a "1000 characters left" indicator.
- Text: "We really appreciate your feedback."
- Text: "Have questions or need immediate support? [Click here](#) and contact the Guest Education Centre."
- Text: "Thanks for keeping it real."
- Text: "How likely are you to recommend our website to a friend or colleague? \*"
- Scale: A 10-point scale with buttons for 0, 1, 2, 3, 4, 5, 6, 7, 8, 9, and 10.
- Form fields: "Name (Optional)" and "Email Address (Optional)".

The background shows the Lululemon website navigation with "WOMEN", "MEN", and "GIRLS" tabs. A sidebar on the left lists categories like "Women's What's New", "Women's Bestsellers", "All Women's", "All Men's", and "All Girls'". A "SHOP MEN'S WHAT'S NEW" button is visible on the right side of the page.



[Express](#)

Non-invasive

Allows me to keep browsing

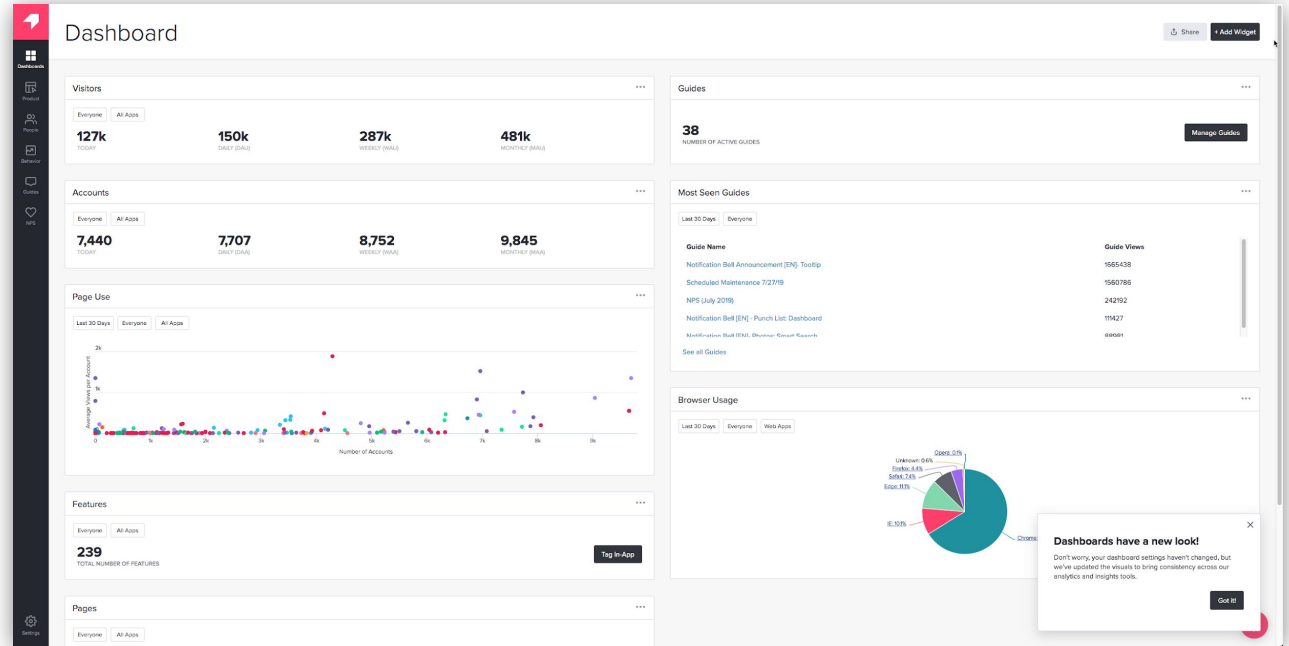
The screenshot shows the Express website homepage. At the top, a red banner displays "50% OFF SUMMER ESSENTIALS" with links for "Details", "WOMEN", and "MEN". To the right, it says "Free Shipping On Orders \$50+" with "Details" and "Order Status" links. Below the banner is the Express logo and navigation links: "MEN", "WOMEN", "JEANS", "NEW ARRIVALS", "SALE", "GIFT CARDS", and "INSPO". A search bar contains "Search Express", and a "SIGN IN & EARN REWARDS" button shows a shopping cart icon with "0". The main visual is a large image of a woman and a man in a city setting. Overlaid on the image is the text "EXPRESS JEANS" in large white letters. Below this text are two white buttons: "WOMEN" and "MEN". At the bottom, a dark footer contains a sign-up form: "SIGN UP TO RECEIVE FUTURE ALERTS & OFFERS" (with a small "express policy" link), an "Email" input field, "SEND ME STYLES FOR" with radio buttons for "WOMEN" (selected) and "MEN", and a "SUBMIT" button. On the right side of the image, there are vertical links for "Feedback" and "Live Chat".

Pendo

Non-invasive

Allows me to keep working

Short & to-the-point



Best in class in-app release notes

Slack

Opt-in

Non-invasive

Doesn't interrupt my work

### What's New ×

Notify me about updates

---

August 21st

#### In case you missed it

We've made Slack even easier to use—with announcement channels, longer channel names and a simpler way to find the person you're looking for. There's a whole lot more, so read our rundown and start taking advantage of these features today.

[Learn more on our blog >](#)

---

June 11th

#### In case you missed it

From a dedicated drafts section in your channel sidebar to dark mode on mobile, there's a handful of new features that help Slack better fit the way you work. To help you take advantage of all our latest features, read our rundown of what's new.

[Learn more on our blog >](#)

---

April 9th

#### New apps for Office 365 and G Suite

Automatically update your Slack status based on your calendar, respond to meeting invites, send emails into Slack, and more with the new Office 365 and G Suite apps for Slack.

Connect the tools you use every day like your calendar, email, and files with Slack to simplify common, everyday tasks.

[Connect your daily tools with Slack >](#)



## The Center of Excellence

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How will each type of Pendo sound?  
How will each type of Pendo be built internally?

**TEST  
ALL  
OF IT**



# Create case studies or do internal testing of your process and components

## Prepare

**What do all users want to understand when they first start using the feature?** When Beta testing, users had a hard time finding the filters, so we should point that out specifically. We should also explore what the Health Dashboard is in general along with what each of the sections shows.

**What do we want users to do with this information?** We want users to feel confident navigating around the tool. We also want to drive adoption through this knowledge.

**What benefit does this feature have for users?** Focused from the new feature toolset! It gives users a birds eye view of their active projects, which is something Procore's reporting historically hasn't done before. Once they understand what needs to be addressed elsewhere it's a project that's over budget, a project with more than the usual overdue RFIs, etc, power users can contact the right people to get their projects back on track.

**Who needs to see this Penelo?** Anyone accessing the Health Dashboard for the first time.

**Where will this Penelo have the most benefit to the user?** Where can they take action immediately with the information? On the landing page of the Health Dashboard. We can assume that the first time users land on the Health Dashboard, they will not know how to navigate the page and even what the Health Dashboard is, so this walkthrough should appear there.

## Target

**Permissions of the targeted users:** Admin permissions on the Company level Portfolio tool **Locale of the users:** contains "en" (ignoring any English variants) **Where the walkthrough will appear:** The landing page of the Health Dashboard Company type only.

**When to target:** December 12 walkthrough! This will only be shown once to users the first time they enter the tool and it's safe to assume that all users will benefit from this walkthrough, so we will leave it on for the foreseeable future and turn it off if that changes.

**User flow & Wireframe:** Attached to Jira ticket

## Create

**Welcome to the Health Dashboard**

**Filters**

**Focused Health**

**Careless Health in Project**

**Annotations:**

- Include an image of the tool as it's all fixed up. This allows to showcase the general look of the new thing, color and placement.
- Include a screenshot of the filters. Using "View" under the "Project" instead of an "Overview" menu will explain the placement of the walkthrough to copy the content of the title is also establishing that the user is supposed to be able to click on the filters.
- Shows the walkthrough functionality in a general context on the page. Shows where to click the user can click on the "Filters" modal, the "Focused Health" modal, and the "Careless Health in Project" modal.
- Use the action in the "Filters" modal, or clicking the user experience.
- Use the action in the "Focused Health" modal, or clicking the user experience.
- Use the action in the "Careless Health in Project" modal, or clicking the user experience.

## Analyze

**Is the walkthrough still needed?** Users seemed to stop seeing the walkthrough on the 2nd before the holiday break, but because there was one person who saw it on the 27th, that tells me that the walkthrough is still viable, and everyone else just got out on holiday (each week, each step), can tell that people aren't seeing the walkthrough appropriately based on the amount of content on each step. People reading the walkthrough also tells me that it is useful for users. The "Timeline Per Queue Step" chart shows me that there's about a 33% drop off after the first step, but almost all of the 33% that go to the next step proceed to finish the whole walkthrough. The context: A high drop-off rate is expected given that most users are working and don't want to be interrupted, but a steady percentage of those users who did continue says that the information is useful and the walkthrough isn't too long.

**Should there be additional or less information?** According to the Penelo analytics, the information presented in the walkthrough seems to be good. However, we will watch Fullstory to see if there's anything that users seem to be struggling with after they end the walkthrough.

- Content is...
  - Concise (Short and to the point, Doesn't include extraneous information)
  - Contextual (Shows up on the page where a user might have a question about the health dashboard)
  - Informative (Has all the information a user needs to know, and includes a sign more link if they want to read more information)
  - Follows Procore's Brand Voice
  - Relevant to the audience

# The Balancing Act

Enter keywords... GO **THE OLD FARMER'S ALMANAC** FOUNDED IN 1792 GET A COPY!

WEATHER ▾ ASTRONOMY ▾ GARDENING ▾ CALENDAR ▾ FOOD ▾ HOME & HEALTH ▾ STORE ▾

### FULL MOON CALENDAR 2019

Date		
January 21		
February 19		
March 20		
April 19		
May 18		
June 17		
July 16		
August 15		
September 14		
October 13		
November 12		
December 12		

### FULL MOON CA

Date	Time	Native American Name
January 10	2:23 P.M.	Full Wolf Moon
February 9	2:34 A.M.	Full Snow Moon
March 9	1:48 P.M.	Full Worm Moon
April 7	10:35 P.M.	Full Pink Moon

## WAIT! DON'T LEAVE

without your

## FREE BEGINNER'S GARDEN GUIDE

### SAVE YOUR GARDEN!

This guide is full of tips on fighting pests, feeding and caring for your garden, and harvesting your crops.

**GET MY FREE GUIDE**

You will also receive our FREE Almanac Companion. We will never share your information.

No, beet it! I don't carrot all for gardening.



### HOW TO START A VEGETABLE GARDEN

FREE BEGINNERS GUIDE TO GARDENING

... HQ WEBCAM

... FROM THE OLD STORE

... er's Almanac Calendar

... ON CALENDAR

## Business Goals

Increase adoption

Increase revenue

Keep the user in the product longer

## User Goals

Learn about gardening

Get free things

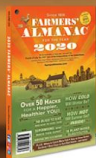
Accomplish whatever they want to accomplish with the least interruption or negative impact to their day-to-day.

Knowledgeable users

Useable product

Giveaways

One-stop shop for gardening



Order your copy today!



Weather

Fishing

Gardening

Astronomy

Health

Best Days & Calendars

## Got Aphids on Your Roses? Get Rid of Them Without Pesticides

by Farmers' Almanac Staff | Posted in: Home and Garden



Aphids are often referred to as "plant lice" and they can really damage your rose plants. Marci Degman, the Aspiring Gardener, shares some expert strategies on how to get rid of them without the use of harmful chemicals. Watch now!



Is there a "Best Day" to kill plant pests? Yes! Take a look.

**FREE BEGINNER'S GARDEN GUIDE**

**SAVE YOUR GARDEN!**

This guide is full of tips on fighting pests, feeding and caring for your garden, and harvesting your crops.

Email Address:

**GET MY FREE GUIDE**

You will also receive our FREE Almanac Companion. We will never share your information.

No, thank you! I don't want all for gardening.



# **The story of a water bottle**



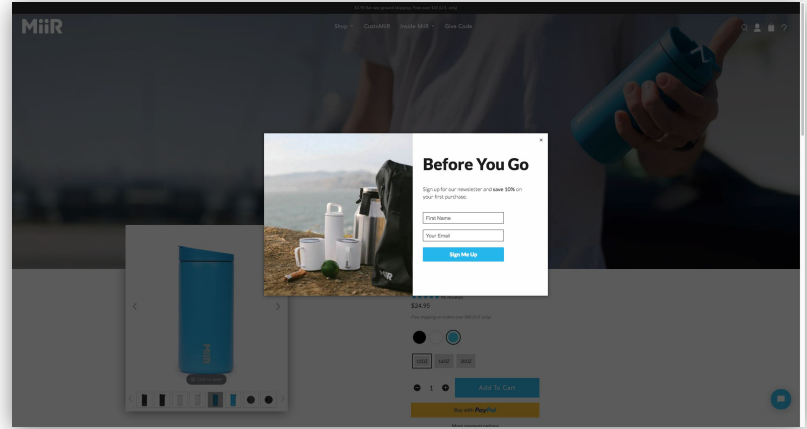
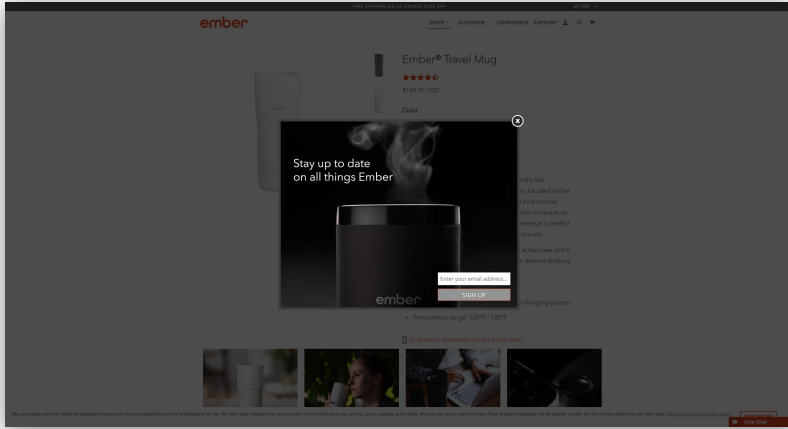
P E N D O M ● N I U M 1 9





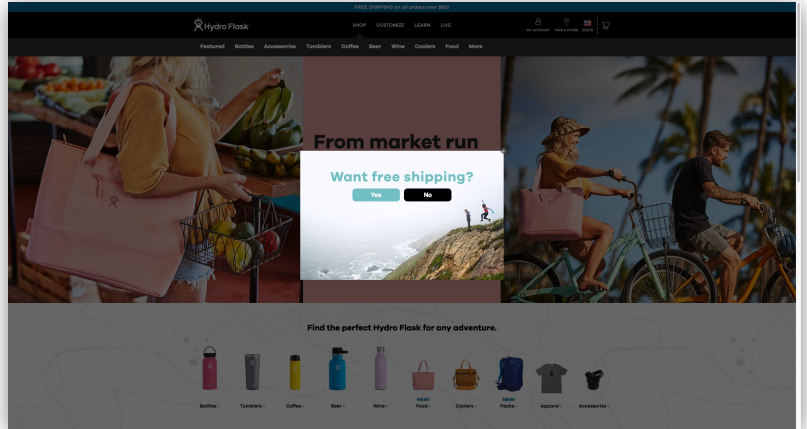
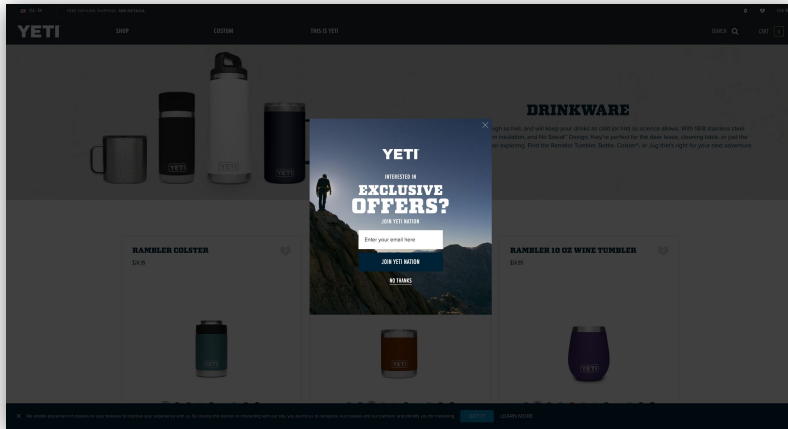
P E N D O M ● N I U M 1 9

Ember



Miir

Yeti



Hydro Flask

FREE SHIPPING ON U.S. ORDERS \$50+ [SEE DETAILS](#)

Swell [Shop](#) [New Arrivals](#) [Personalize](#) [Sale](#) [Corporate Gifts](#) [HELP](#) [SUBSCRIBE](#) [SIGN IN](#) [REGISTER](#)

SEARCH

### Teakwood Traveler

SIZE

QUANTITY

PERSONALIZE

**SIGN UP + GET 10% OFF**  
YOUR FIRST PURCHASE

ENTER EMAIL ADDRESS

First Name  Last Name

SHARE YOUR BIRTHDAY WITH US!

Month  Day  Year

The Traveler will quickly become your go-to for its shape is optimal for stowing up and carrying a favorite beverage.

- Swell travelers feature triple-walled, vacuum-insulated construction, designed to keep beverages cold for up to 24 hours or hot for up to 12.
- Made from 100% food-grade stainless steel with superior construction that allows for refilling and recycling easily to reduce the need for single-use plastic water bottles.
- Copper-infused steel creates a condensation-free exterior that won't sweat on your hands or in your bag.
- Feature a wide mouth and thick rim for easy drinking. Ice cubes fit effortlessly inside.
- Ergonomic grip allows for even more on-the-go ease.
- BPA Free and reusable.
- Hand-wash only.

Dimensions

Material

Share: [f](#) [t](#) [p](#) @swellco swelloadventures

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SEARCH

### Aurora Traveler

SIZE

QUANTITY

PERSONALIZE

**LAST CHANCE**  
**GET 10% OFF**  
when you enter your email below.

Enter your email here

The Aurora will quickly become your go-to for its shape is optimal for stowing up and carrying a favorite beverage.

- Swell travelers feature triple-walled, vacuum-insulated construction, designed to keep beverages cold for up to 24 hours or hot for up to 12.
- Made from 100% food-grade stainless steel with superior construction that allows for refilling and recycling easily to reduce the need for single-use plastic water bottles.
- Copper-infused steel creates a condensation-free exterior that won't sweat on your hands or in your bag.
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- Ergonomic grip allows for even more on-the-go ease.
- BPA Free and reusable.
- Hand-wash only.

Dimensions

Material

Share: [f](#) [t](#) [p](#) @swellco swelloadventures

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Swell

Would you like

**10% OFF**

YOUR FIRST PURCHASE?



## Opal Marble Traveler

SIZE

16oz

QUANTITY

- 1 +

**\$35.00**[ADD TO BAG](#)

Perfectly contoured to fit in your hand, the Traveler will quickly become your go-to for drinking on-the-go. This new wide mouth shape is optimal for stirring up and carrying a cup of coffee or adding ice cubes to your favorite beverage.

Dimensions

+

Material

+

Share: [f](#) [t](#) [p](#) @swellbottle #swelladventures

### THERMA-S'WELL™ TECHNOLOGY

Keeps beverages cold for up to 24 hours  
and hot for up to 12.



### ECO-FRIENDLY

BPA-free and reusable.



### TRIPLE-WALLED

Vacuum-insulated, high-grade 18/8  
stainless steel.



### NO SWEAT

Condensation-free, the exterior will  
remain dry.

## Frequently Asked Questions

How does my S'well work?

+

Will my S'well product sweat?

+

Can I fly with my S'well?

+

Does S'well sell different caps &amp; lids?

+

What is the warranty on S'well products?

+



## Delivered Aug 1, 2019

Your package was left near the front door or porch.



S'well 10316-B17-01140 Stainless Steel Traveler, 16oz, Opal Marble

Sold by: M2CK GROUP

Return eligible through Aug 31, 2019

\$25.00

Buy it again





**P E N D O M ● N I U M 1 9**

**THE CONFERENCE**

[www.pendo.io](http://www.pendo.io)