Pendo Center of Excellence Accelerator Services

Service Overview

Pendo Center of Excellence Accelerator Services ("Professional Services") are outcome-based engagements delivered by Pendo.io, Inc. ("Pendo") to help customers establish a scalable Center of Excellence (“CoE”). The CoE defines how the customer will govern its use of Pendo, maintain consistent practices, measure impact, and expand the value of Pendo across the organization.

We guide the customer’s team through a structured series of working sessions and activities, provide templates and examples based on best practices, and help them adapt each deliverable to their organization. The goal is to build the CoE collaboratively while preparing the customer’s team to own and sustain it independently.

Pendo partners with key customer stakeholders through the following phases:

- Kickoff — align on CoE goals, foundations, stakeholders, scope and meeting cadence
- Establish Foundations — build the CoE Charter, governance model, roles, and repeatable processes
- User Experience Change Control — establish a consistent process for creating, reviewing, approving and managing customer experience changes
- Impact Measurement & Insights — define how the organization will measure impact and report results
- Sustain & Scale — Enable long-term, self-sufficient operation

Implementation Activities

Pendo will be responsible for the following CoE Accelerator services (collectively, the “Professional Services”):

Phase	Objective	Key Activities
Kickoff	Align with the customer on Center of Excellence goals,	• Review CoE foundations — purpose, approach, governance models (centralized / hybrid / distributed), roles, resources, and goals

Phase	Objective	Key Activities
	foundations, and cadence.	• Establish meeting cadence and review key CoE workshops • Set expectations for documentation and shared resources
CoE Foundations	Build the repeatable structure and processes needed for ongoing use and scalability.	• Draft CoE Charter with clear vision, mission, objectives, scope, governance model, roles, cadence, and success metrics • Establish user roles, permissions, and access request process • Define naming conventions, product areas, tagging process, segment verification, and feedback foundations • Document rollout and onboarding plans for future applications
User Experience Change Control	Formalize governance for ongoing customer experience changes.	• Create and refine the process (roles & responsibilities, guide creation process, approval process, segment creation, etc.) for implementing a customer experience change (guides, emails, idea portal, roadmaps) • Establish change control documentation
Impact Measurement & Insights	Institutionalize measurement and reporting practices for the CoE.	• Align on process/methods for measuring and documenting success criteria for use cases • Define success measurement cadence • Define dashboard requirements and reporting cadence; build dashboard and reporting templates • Document best practices for insight sharing across teams
Sustain & Scale	Enable long-term ownership and continued expansion of Pendo adoption.	• Finalize and publish governance & resources, including a full RACI across all applications • Formalize maintenance cadence (audits, governance reviews) • Document next steps in a 6–12 month CoE roadmap

Engagement Management
• Includes development of project plan, resource coordination, project syncs, and regular status updates • Facilitates cross-functional team success definition, planning, and execution

Deliverables
• CoE kickoff deck • Project plan • CoE Charter (vision, mission, objectives, scope, governance model, roles, cadence, and success metrics) • Confluence/Sharepoint inventory including COE charter, Pendo governance documentation, onboarding resources, Pendo roadmap, permissions, success stories • Recap document (project summary and recommendations) at project close

Customer Roles and Responsibilities

Customers are expected to:

- Assign key roles (see below)
- 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
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	10% FTE
COE Lead	Primary point of contact who will oversee Pendo strategy, governance, and cross-functional alignment to drive adoption and impact.	20% FTE
Pendo Specialists	Guides, Analytics, Listen, etc SMEs that enable success at the ground level. Work closely with COE stakeholders to ensure successful execution of COE foundations and implementation of the Pendo solution.	20% FTE
Technical Owner	Technical owner of the Pendo solution, ensures proper configuration and installation of Pendo on apps, integrations, and initial metadata. Works to ensure technical decisions and standards are applied as necessary to all product teams installing Pendo.	5% 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.
- The customer has an active Pendo subscription and will provide the access needed to support discovery and validation activities.
- 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 expire and must be consumed within 180 days after execution of the Order Form or other ordering document between Pendo and the Customer
- Onsite travel can be contracted via a change request and in accordance with the terms of the Agreement. Pendo Professional Services will otherwise be performed on a remote basis.
- Services will be delivered remotely during mutually agreed-upon business hours unless otherwise specified.
- The engagement will focus on the business units, teams and use cases agreed upon during kickoff.
- Expansion beyond that scope may require additional services.
- Pendo will use standard templates, examples and best practices as starting points. Deliverables will be adapted based on the customer's organization, goals and input.
- Recommendations and deliverables will be based on the information provided by the customer and the stakeholders participating in the engagement.
- The customer will make final decisions regarding its CoE structure, governance model, policies and processes.
- The engagement timeline assumes timely stakeholder participation, decisions, feedback and completion of agreed-upon activities. Customer delays may affect scheduled milestones and completion dates.
- The customer is responsible for internal adoption, change management and implementation of the finalized CoE model unless those activities are explicitly included in scope.
- Hands-on technical implementation, custom development and configuration are not included unless specifically identified in the service description.
- Any work requested beyond the agreed-upon scope, activities or deliverables will be evaluated separately and may require a change order or additional services.

The Center of Excellence Accelerator 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.

Last updated: October 13, 2026