

Pendo Getting Started Services

Onboarding Approach

The Pendo Getting Started Service ("Professional Services") is a structured, time-bound engagement designed to help new [Pendo.io](https://pendo.io), Inc. ("Pendo") customers—either onboard their first application or expand with a new module—realize value quickly with the Pendo platform ("Subscription Services"). This package is tailored for organizations scaling up their usage of Pendo, especially those with 100+ employees or those implementing a new Pendo module such as Listen or Orchestrate.

The engagement typically spans 6 to 8 weeks, during which a dedicated Consultant guides customers through installation and core enablement toward your initial use case.

Milestone-Based Outcomes

All Getting Started Services are designed to achieve a combination of the following milestone outcomes, depending on package tier:

- Installed – Pendo is properly implemented in the production environments of the relevant applications and validated.
- Training Completed – Customer teams are enabled on core Pendo features and modules.

These milestones correspond to Pendo's Product-Led Onboarding Journey and ensure a consistent path to platform value realization.

Getting Started Services Options

The table below outlines the options available, as explained below in "Implementation Activities":

Activities	Getting Started (Platform Enablement)	Getting Started (Listen)	Getting Started (Orchestrate)
Number of applications in scope for Installation Support	1 app	1 app	1 app
Platform Enablement	Included for one team	Module-Focused on Listen	Module-Focused on Orchestrate
Consultant	Included	Included	Included

Implementation Activities

Pendo will be responsible for the following Getting Started implementation services: installation support, platform/ module enablement and project management activities described in more detail below (collectively, the “Professional Services”):

Installation Support

- Provide consultation on the technical deployment of the Pendo snippet or mobile installation
- Advise on metadata requirements and provide guidance on a standardized implementation approach
- Pendo will perform an installation review to validate that the initial Pendo installation is functioning as expected

Platform Enablement

- Kickoff & Goal Alignment
 - Introduce the Pendo team and objectives
- Platform Enablement
 - Provide core product training to build foundational knowledge and use case baselines through Pendo configuration and reporting.
 - Use case-focused enablement topics can include the following, as identified and recommended by the Pendo team:
 - Tagging
 - Analytics (includes dashboards and segments)
 - Guides
 - Optional Topics as recommended by the Pendo team:
 - Session Replay, NPS, Resource Center, etc.
- Onboarding Recap & Value Check
 - Review key insights surfaced.
 - Align on success metrics and next steps for scale.

Listen Enablement

- Kickoff & Goal Alignment
 - Introduce Pendo team and objectives
 - Establish objectives for using Listen
- Installation Review
 - Confirm Listen is enabled in the product.
 - Ensure appropriate user roles, permissions, and tagging structures are in place.
 - Assist with migration effort (if migrating from Feedback)
- Module Enablement
 - Configure and test feedback widgets.
 - Establish routing and classification logic (themes, tags, urgency).
 - Train on reviewing and triaging feedback.
 - Use AI Summary to identify key trends.
 - Teach filtering and segmenting based on user metadata or behavior.
- Use Case Buildout
 - Build method of collection via portal or Resource Center for key use case
 - Practice prioritizing feedback tied to product goals or roadmap input.
- Onboarding Recap & Value Check
 - Review key insights surfaced.
 - Align on success metrics and next steps for scale.

Orchestrate Enablement

- Kickoff & Goal Alignment
 - Introduce Pendo team and objectives.
 - Establish objectives for using Orchestrate.
- Installation Review
 - Verify DNS setup for sending domains and optional MAIL FROM/tracking domains.
 - Ensure email metadata (Visitor ID, Email Address) is flowing into Pendo.
 - Review unsubscribe logic, permissions, and required Academy courses.
- Module Enablement
 - How to create Journeys and Messages toward key use cases.
 - Email best practices and compliance.
 - Show how to use Journey Analytics and interpret performance.
- Use Case Buildout
 - Activate a cross-channel Journey tailored to customer goals.
 - Build, measure, and refine communication strategies inside Pendo.
 - Replace or supplement legacy email tools with Orchestrate for in-product engagement.
- Onboarding Recap & Value Check
 - Review key insights surfaced.
 - Align on success metrics and next steps for scale.

Consultant Activities

- Conduct project kickoff meeting with Customer
- Facilitate discussions on key objectives for the engagement, align on priority for the Getting Started engagement, and coordinate schedules
- Coordinate resources from Pendo to support the project objectives and schedule
- Share proven best practices and implementation strategies
- Hands-on resource for guide configuration, tagging support, and additional configuration needs
- Provide regular project status updates
- Deliver project recap session, including a value recap and outcome validation

Deliverables

- Kick off deck
- Installation review checklist, including customer-specific configurations and recommendations
- Use case enablement completed for areas like tagging, in-app guides, and user analytics dashboards, as well as module-focused activities
- Recap document (project summary and recommendations) at project close

Customer Roles and Responsibilities

Customers are expected to:

- Install the Pendo snippet or SDK
- Provide access to relevant applications and environments
- Assign key roles (see below)
- Participate in required planning, enablement, and validation activities
- Align internally to define and adopt Pendo governance and processes

Recommended project roles and associated time commitment is as follows:

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
Champion	Primary point of contact who will oversee adoption of Pendo and establish metrics for success.	10% FTE
Technical Owner	Technical owner of the Pendo solution, ensures proper configuration and installation of Pendo on apps, and initial metadata. The majority of effort is in the first 30 days.	5% FTE

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Pendo User	Enables project success at the ground level. Manages the Pendo subscription on a day-to-day basis including activities such as tagging, template design, and implementation and adoption of the Pendo solution. Ensures Pendo is installed on their application during the Install Review session(s).	20% FTE
Project Manager	Works closely with Pendo consultant to manage schedules, resources, and risks to ensure on-time delivery.	10% FTE

Assumptions

- Customer will install Pendo code on the applicable Customer and provide access to Customer's Pendo subscription and such application(s) as needed to provide Professional Services.
- 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 60 days after contract execution
- The Professional Services include up to the specified number of applications and use cases covering the Implementation Activities as described above. For clarity, Customer must have an active, paid subscription for any application key in scope for the Professional Services.
- The Professional Services will be performed remotely. Onsite travel can be contracted via a change request and in accordance with the terms of the Agreement.

The Getting Started implementation 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.

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