Getting Started with Pendo Feedback

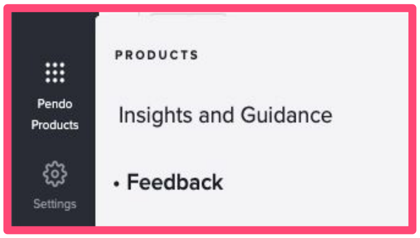
With Pendo Feedback, you can make data-informed decisions about what to build next in your product(s) and how to improve your customers' product experience. To get started, follow this 9-step process. Each step walks you through a recommended process, the culmination of which is launching Feedback in your organization.

1 Plan Your Installation (Skip to step 2 if you are on Pendo already)

For Feedback to be enabled, you'll need to first install the Pendo snippet. Since you're likely brand new to Pendo, start by planning for your installation. Once you're ready, the engineer/technical member of your team should follow these instructions to install Pendo on your web app.

2 Confirm Access

The Feedback subscription needs to be activated by Pendo. After your Pendo representative gives you the confirmation, check to see if you have access. To do that, navigate to Pendo, click **Pendo Products** in the lower left of the screen (see screenshot), and select **Feedback** to open the product.



3 Create a Product Feedback Policy

Before launching Feedback to your customers or rolling it out internally, it's a best practice to first create what we call a Product Feedback Policy. Think of it as a governance structure and processes that support the Feedback tool. Having one in place creates the best possible experience for your users. This policy should outline how users submit feedback and set expectations on how their feedback will be managed. Use this template as a guide.

4 Establish Feedback Settings Part I: Customize Branding and Set Visitor Views

To get the most from Feedback, you'll configure it to meet your business needs. We recommend you start by branding it for your application and setting up the default visitor view. To do so, see the branding and visitor settings in the product settings guide.

5 Establish Feedback Settings Part II: Customize Request Status, Request Form and Saved Response Messages

Feedback allows you to customize the form that your visitors and teams use to make a request. Editing the questions allows Feedback to collect the information most relevant to you. Learn how to customize forms here.

Within Feedback, you can set a custom status for each request and use it as a means to communicate with the submitter. As part of setup, you can also add an automated message for each status to add more detail to the status such as your Product Feedback Policy. Establishing these settings helps you save time as you use Feedback. Learn how to create your own custom saved responses/replies here.

6 Add Requests or Import Backlog

After establishing the settings, you are ready to populate Feedback with requests. We recommend starting fresh by adding new requests data. However, if you prefer to import historical or existing requestor data, we recommend importing only the most relevant and recent data. Learn how to import data here.

7 Create a Roadmap

Consider creating an initial roadmap so that you, your team members, and your customers can visualize the future progression of your product. You have control over who sees the roadmap, and you can add details to it after the initial setup. Learn how to create a roadmap here.

8 Integrate with Feedback

Pendo Feedback's Salesforce, JIRA, Zendesk, and Zapier integrations enable you to easily plug Feedback into your existing processes and increase efficiencies with your product team. If you intend to add an integration(s), refer to this article on planning your integration setup with Feedback then contact your Pendo Account Manager to discuss the integration packages.

9 Set-up User Permissions and Invite Your Team!

At this point, you're ready to invite your team to use Feedback. Use this guide to create roles, set permissions for each role, and add team members.

Need further guidance or assistance? Contact your Pendo Account Manager to learn about our Services Packages.