pendo

Getting started with your
Product Engagement Score:

Selecting your
Core Events

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01
Introduction

For too long, product teams have struggled with using the right metrics to understand how users engage with their software. With so many metrics to select from, it's no surprise that product managers are often left feeling overwhelmed and frustrated. That's why we created Product Engagement Score (PES)—a single, quantitative, and proactive metric that measures overall product engagement by combining Adoption, Stickiness, and Growth.

With PES in hand, you can:

✦ Quickly assess product performance and take action to improve your product

✦ Identify at-risk customers so you can get ahead of customer churn

To get started with PES, you'll first need to select up to 10 Core Events for your app. **Core Events are the key features, pages, and track events that drive value** for your product, and are required for the Adoption component of PES. Think of them as "aha" moments— when a user internalizes the value of your product. Once you've set up your Core Events, PES will begin populating immediately, no calculations required.

We know that starting this process can be daunting (trust us, we've been there!), so this workbook is designed to help you figure out your Core Events in three easy steps. We hope you find this process as educational as our customers and our own product team have.

02
The Process

STEP 01:

Map a user's onboarding process within your product

As much as we like to think otherwise, first impressions matter. And in software, the initial experience with your product is key to building a lasting relationship with your users. Effective onboarding has been shown to lead to higher retention, more conversions, and lower support costs. So, when selecting Core Events, it's best to begin with your user's onboarding experience within your product.

YOUR TASK:

In the worksheet on page six, you'll find a blank timeline of one month. Depending on your app, a user may take more or less than a month to onboard to your app, so adjust as you see fit. As you consider your own product, go ahead and document the onboarding process for new users in the first month by jotting down key events in the boxes.

Helpful tips:

✦ Take note of first impressions and how users may feel in those initial onboarding steps.

✦ Focus on what generally happens for most new users—don't get too much into the weeds on what happens in edge cases.

✦ Ask yourself what the user's goal is in using the product, and use that to help you document the key steps in the onboarding journey.
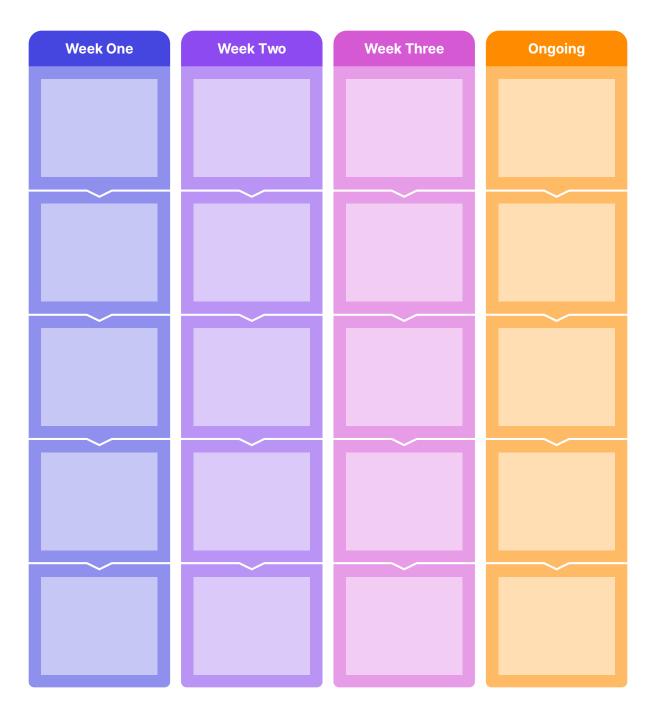
✦ Example: a graphic design tool

To help you visualize what a user's onboarding process looks like, we've included an example of a new user journey for a graphic design tool that's built for anyone to use. Like most new users, Alex is looking to create professional-looking designs that she can then share with the rest of her marketing team.

Week One	Week Two	Week Three	Ongoing
Alex visits the tool's website, signs up for the free trial	Alex shares her design with the team	With dozens of design files, Alex organizes them into different folders	Easily discovers fresh, new templates to create designs
Finds a few ready-to-go free templates	Teammates sign up to create designs of their own	Alex imports additional branded assets and templates for everyone's use	Continues to collab with teammates by co-editing and commenting directly in the document
Selects a template and begins editing	Alex and the team begin sharing designs inside the tool	The team keeps exploring the tool's features	
Uploads own images to add to template	Teammates co-edit designs and add comments & feedback, all in real-time	Alex finds out that designs can be published directly to social media	
Saves completed design file to computer		Alex's company decides to buy a subscription after the free trial	

User Journey Map

Use the table below to record the steps your users would take in their onboarding journey. You'll use this sheet later to highlight your Core Events.

Week One	Week Two	Week Three	Ongoing

STEP 02:
Identify your Core Events

Referring to the worksheet you filled out on page six, let's now identify some Core Events.

YOUR TASK:

Remember that **Core Events are moments when the user finds value in the product** and gets closer to accomplishing their intended goal. Core Events should be thoughtfully selected, so take your time examining all the events on your journey map. Not every step can be a Core Event! As you identify a Core Event, add an asterisk and bold the event name.

> **Note:** In Pendo, these moments can be the features, pages, or track events that you've tagged in your product.

Helpful questions to consider:

✦ **What is the user's goal?** Again, understanding the user's goal helps direct where in the product the user finds value.

✦ **What step is making the user's life better?** This is likely going to be a Core Event or a moment of delight.

✦ **Where along the timeline is the user reaching the Core Event?**
Is it within a few hours or within days or weeks? A long time period may point to signs of frustration.

✦ Example: a graphic design tool

Given that Alex's primary goal is to create designs and share them with her team, the most valuable parts of the product are those points in time when she successfully created a new personalized design and shared it with her colleagues.

Week One	Week Two	Week Three	Ongoing
Alex visits the tool's website, signs up for the free trial	Alex shares her design with the team	***With dozens of design files, Alex organizes them into different folders**	***Easily discovers fresh, new templates to create designs**
Finds a few ready-to-go free tem-plates	Teammates sign up to create designs of their own	***Alex imports additional branded assets and templates for everyone's use**	Continues to collab with teammates by co-editing and commenting directly in the document
Selects a template and begins editing	***Alex and the team begin sharing designs inside the tool**	The team keeps exploring the tool's features	
*Uploads own images to add to template	***Teammates co-edit designs and add comments & feedback, all in real-time**	***Alex finds out that designs can be published directly to social media**	
Saves completed design file to computer		Alex's company decides to buy a subscription after the free trial	

However, along the way, she also discovered additional features that proved to be especially valuable, including the ability to co-edit in real-time, publish designs directly to social media, and many more. Based on this analysis, a total of seven Core Events were identified, denoted by the bolded event names with asterisks.

STEP 03:
Select up to 10 Core Events

Now that you have identified some potential Core Events, the next step is to build a list that you can use to review and confirm your final Core Events.

YOUR TASK:
Write down all the Core Events you bolded and marked with an asterisk starting on page 11. With this list in hand, follow this three-step checklist as you finalize your Core Events:

01 **Do each and every one of your Core Events map to a moment when a new user finds value in your product?** Ask yourself this question again as you go through your list.

02 **Do you have more than 10 Core Events?** If so, begin prioritizing and crossing off events that appear to be less important or are only applicable to a smaller segment of new users (vs. what is applicable to most new users). If you have 10 or fewer Core Events, keep your list as-is.

> **Helpful tip:** If you're really having trouble deciding, simply start with a few best guesses. What's important is to get started, and you can always edit your Core Events at any time. A few Core Events are enough for you to start measuring and using Product Engagement Score.

03 **Do all of these Core Events map to a tagged page, feature, or track event in your product?** Make sure that you have a corresponding tagged event in your product that matches each Core Event in your list.

The final Core Events list for the graphic design tool example is provided on the next page.

✦ **Example: a graphic design tool**

For the same example of the graphic design tool, Alex reviewed each Core event using the three-step checklist, resulting in a finalized list of Core Events. With this list, the Core Events are ready to be implemented into the Pendo app. We've included a few examples below to get you started.

Core Event #1: Uploads own images to add to template

☑ Did the user find value? ○ Page ⦿ Feature ○ Track Event

Event Tag:

Upload image

Core Event #2: Alex and the team begin sharing designs inside the tool

☑ Did the user find value? ○ Page ⦿ Feature ○ Track Event

Event Tag:

Shared and added users to the file

Core Event #3: Teammates co-edit designs and add comments & feedback, all in real-time

☑ Did the user find value? ○ Page ⦿ Feature ○ Track Event

☑ Is this event in your top 10?

Event Tag:

Add comments

Core Event #4: With dozens of design files, Alex organizes them into different folders

☐ Did the user find value? ○ Page ○ Feature ○ Track Event

☐ Is this event in your top 10?

Event Tag:

N/A: Not CE, search replaces folders

Core Events Worksheet

Use the blank form below to list your Core Events. Extra space has been provided, but try to use your best judgement and limit your list to a **maximum of 10 Core Events.**

Core Event #1:

Did the user find value?

Page   Feature   Track Event

Event Tag:

Is this event in your top 10?

Core Event #2:

Did the user find value?

Page   Feature   Track Event

Event Tag:

Is this event in your top 10?

Core Event #3:

Did the user find value?

Page   Feature   Track Event

Event Tag:

Is this event in your top 10?

Core Event #4:

Did the user find value?

Page   Feature   Track Event

Event Tag:

Is this event in your top 10?

Core Event #5:

Did the user find value?

Is this event in your top 10?

Page   Feature   Track Event

Event Tag:

Core Event #6:

Did the user find value?

Is this event in your top 10?

Page   Feature   Track Event

Event Tag:

Core Event #7:

Did the user find value?

Is this event in your top 10?

Page   Feature   Track Event

Event Tag:

Core Event #8:

Did the user find value?

Is this event in your top 10?

Page   Feature   Track Event

Event Tag:

Core Event #9:

Did the user find value?

Is this event in your top 10?

Page   Feature   Track Event

Event Tag:

Core Event #10:

Did the user find value?

Page   Feature   Track Event

Event Tag:

Is this event in your top 10?

Core Event #11:

Did the user find value?

Page   Feature   Track Event

Event Tag:

Is this event in your top 10?

Core Event #12:

Did the user find value?

Page   Feature   Track Event

Event Tag:

Is this event in your top 10?

Core Event #13:

Did the user find value?

Page   Feature   Track Event

Event Tag:

Is this event in your top 10?

Core Event #14:

Did the user find value?

Page   Feature   Track Event

Event Tag:

Is this event in your top 10?

Core Event #15:

Did the user find value?

Page   Feature   Track Event

Event Tag:

Is this event in your top 10?

Core Event #16:

Did the user find value?

Page   Feature   Track Event

Event Tag:

Is this event in your top 10?

Congratulations! You now have your list of Core Events. The last step is to set up your Core Events on the Product Engagement Score page in Pendo and select the specific page, feature, or track event that corresponds to each of your Core Events. Navigate back to the Product Engagement Score page and check out your score. Explore the drilldowns to dig deeper into each component of PES and monitor it over the next few weeks to see how the score changes over time.

03
Conclusions and Resources

We hope you've enjoyed the process of selecting your Core Events and that you've learned a few things along the way. Take it from us—we went through a few rounds ourselves to get it right, and we are still continuing to iterate and learn from our own mistakes as we monitor our Core Events list. Sometimes, the hardest thing to do is to simply get started, so we hope this workbook has helped you take that very first step.

Looking for more Core Events and Product Engagement Score help? Check out these resources:

Blog post
How Product Engagement Score Drives Business Success   →

Blog post
How the Pendo product team chose their own Core Events   →

Customer story
How Elsevier used Core Events to define adoption success   →

Customer story
How IHS Markit uses Product Engagement Score to make more outcomes-based product decisions   →

Pendo helps teams of all sizes put their product at the center of their business so they can create the best customer experiences possible. With Pendo's complete product adoption platform, you can combine retroactive usage analytics, in-app messaging, and feedback tools to better understand, guide, and close the loop with your users. And it all works at scale–no coding necessary. Pendo customers include the world's leading software companies and digital enterprises, including Verizon, Morgan Stanley, LabCorp, OpenTable, Okta, Salesforce, and Zendesk.

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