



Operationalizing Pendo: The Center of Excellence blueprint

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**PENDO
MONIUM
2026**



What We Do

We help companies solve what's missing in their customer relationships.

How We Do It

We provide hands-on technical + strategic advisory services to help teams deliver and scale great products.



Enterprise
Foundations



Use Case
Accelerator




Managed
Services



Agent Deployment

Why Balboa

- Product, sales, marketing, and customer success expertise
- Data analytics, integration, and AI
- Proven engagement model with rapid ROI
- Certified Pendo Partner 

Our Experience



Our purpose is people



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- *Co-Founder & CTO of Balboa Solutions*
- *Pendo's Business Impact Award*
- *10+ years working with Pendo*

I built a career connecting human insight to business success

Why a CoE matters

Center of Excellence (CoE) *(noun)*

A centralized framework within an organization that establishes and promotes best practices, standardized processes, and shared resources around a specific domain — in this case, Pendo.

Center of Excellence ASSETS



EVENTS



GUIDES



METADATA

DOCUMENTS

Tagging procedures

Templates & themes

Metadata sources

Approval process

Metadata limitations

Shared

Ownership

Audit schedule

Naming conventions

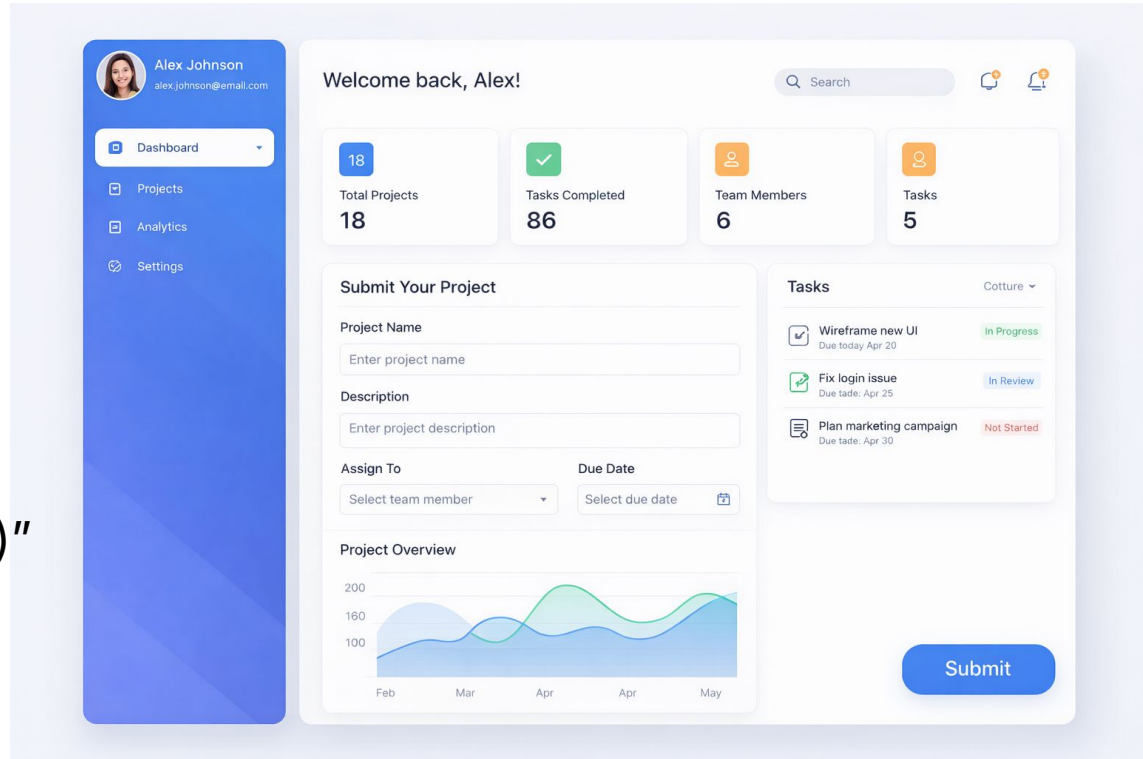
"Submit Button"

"The submit button"

"Submit (New)"

"Submit (Dashboard)"

"Projects ~ Submit"



3 pillars of proper naming



Clear

Easy to understand using
language recognized
across teams



Concise

Brief and streamlined while
still preserving the core
meaning



Contextual

Specific enough to show
what the event relates to
and where it happens

Naming examples

PAGES

[Page] > [Page]

Ex. Settings > Account Settings

FEATURES

[Page] > [Page] ~ [Interaction] ([type])

Ex. Settings > Account Settings > Edit Info (button)

Why a Guide CoE Matters



Congratulations, Penelope!

From all of us here at Acme, we would like to extend a congratulations on your recent promotion. We look forward to seeing your continued success!

Have a great day!

WELCOME TO YOUR GUIDED EXPERIENCE

We're excited to walk you through this feature! This guide will help you understand how everything works, why it matters, and how to get the most out of it. Don't worry—you can move at your own pace, revisit steps anytime, and skip ahead if you already feel confident.


Step 1: Getting Oriented

Before we dive in, take a moment to familiarize yourself with the layout of this page.

The navigation menu is located on the left-hand side (or top, depending on your setup).

Your primary workspace is in the center—this is where most of your actions will take place.

You may also notice secondary panels, filters, or toolbars, which provide additional options.

 **Tip:** Hovering over icons will often reveal tooltips with more information.

Step 2: Understanding the Core Feature

This feature is designed to help you accomplish your goals more efficiently by:

- Streamlining your workflow
- Reducing manual effort
- Providing clearer visibility into key actions



Center of Excellence DREAM TEAM



APP LEVEL



ORG LEVEL



Pendo Admin



Governance Lead



Analytics Team Lead



Technical Lead



Technical Expert

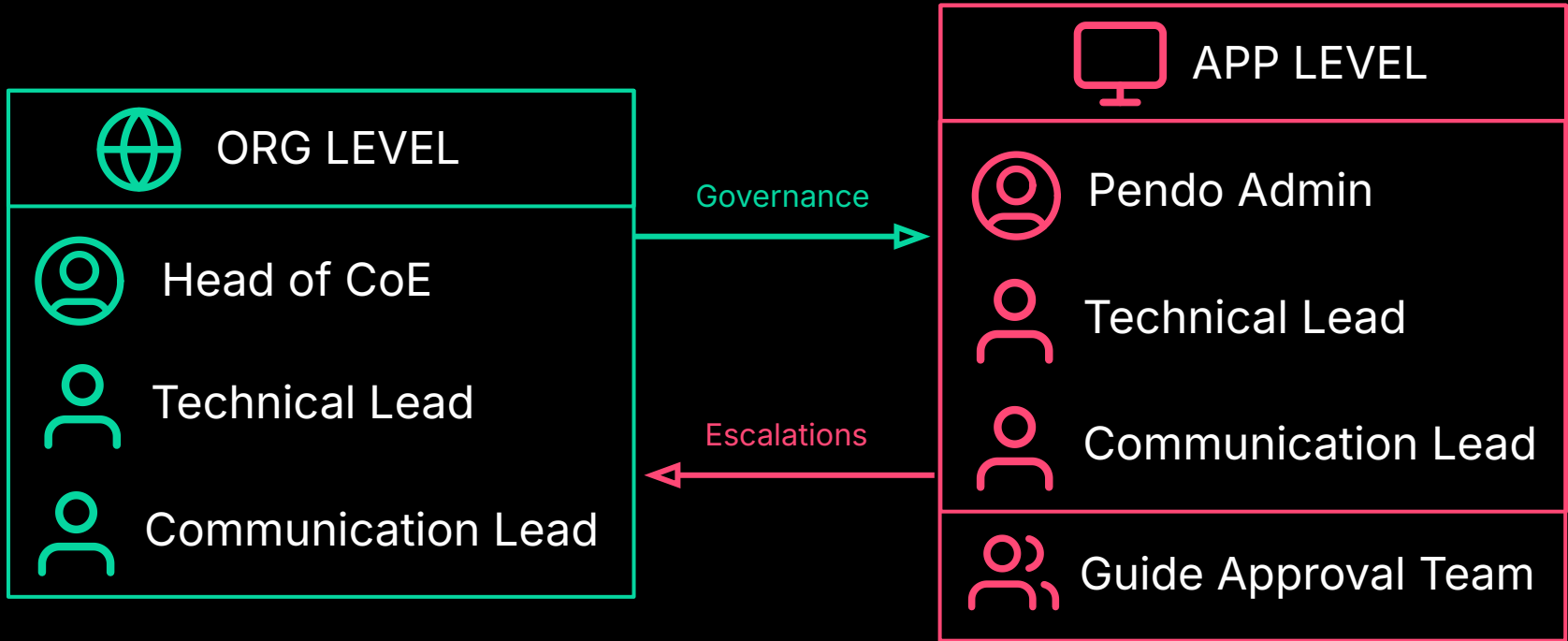


Communication Lead



Guide Approval Team





Center of Excellence DREAM TEAM



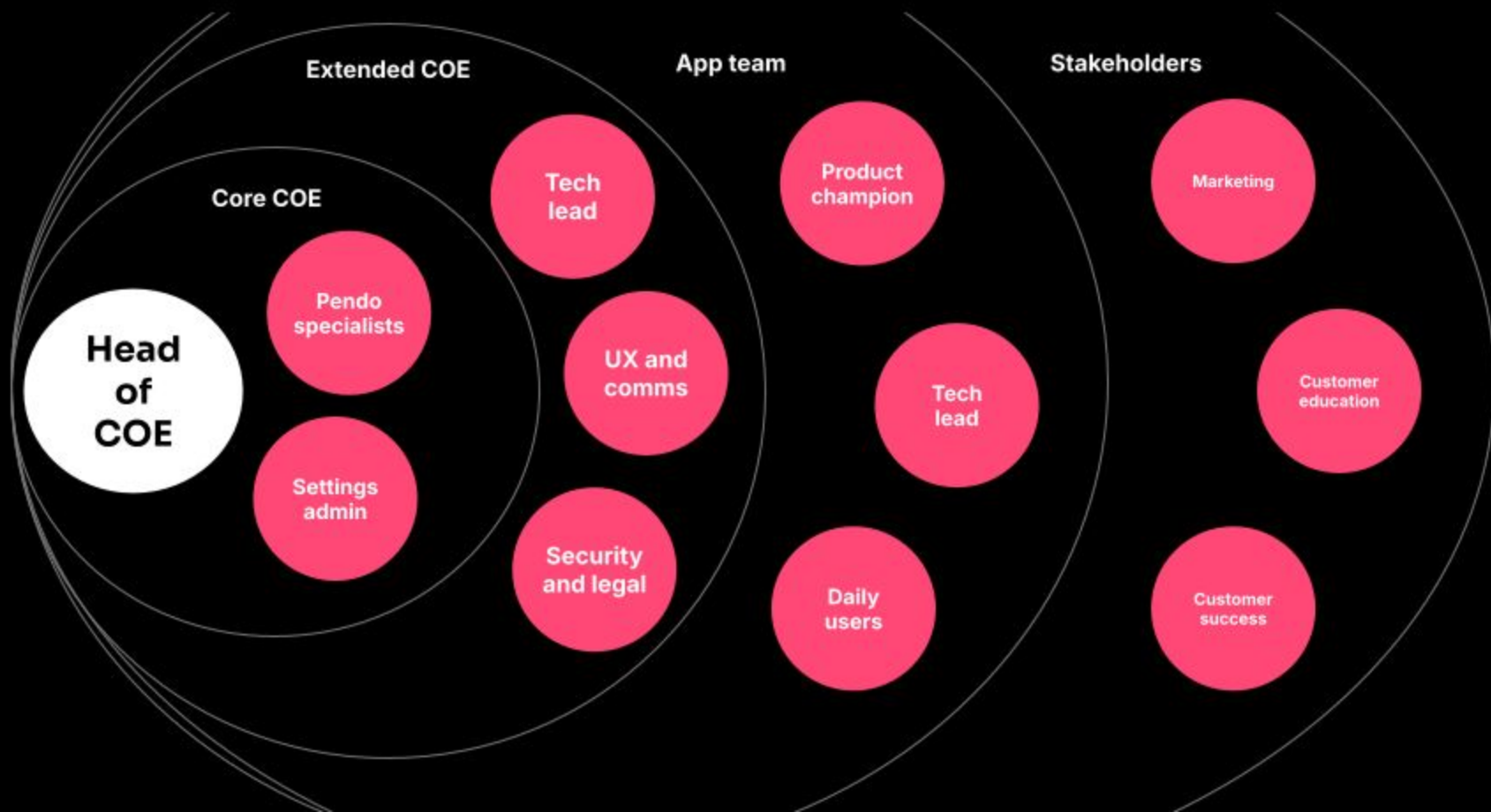


Center of Excellence Responsibilities

 APP LEVEL

	Pendo Admin	Tagging / Audits
	Technical Lead	Install / Metadata / Track Events
	Communication Lead	Themes / Templates / Process
	Guide Approval Team	Approve Guides

Pendo COE example roles



Why a CoE Matters



Thank you!

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