

# In-Software LXD Framework



# After using In-product LXD, users should...

## Know

- How to get value out of PI (how PI applies to them/solves their business problems)
- How to apply PI
- How to navigate PI software
- What to use, when, and how to find it (ie. go to catalyst for X, do tour for X)

## Do

- Accomplish tasks they're trying to do
- Share software output and knowledge with others
- View additional learning content (VILT, Catalyst, elearning, etc)
- Attend workshops
- Return to the software
- Provide feedback about their experience
- Make PI Smarter (enter industry data, etc)

## Feel

- Knowledgeable, armed, confident, smart, successful, optimistic, excited, and energized
- LX is crazy simple to use, easy to get started
- Information is what they need and when they need it
- PI is valuable
- Want to share their knowledge

# In-Product LXD Mission Statement

The in-software learning experience provides users with content and resources that enable them to gain *proficiency* with the tool.

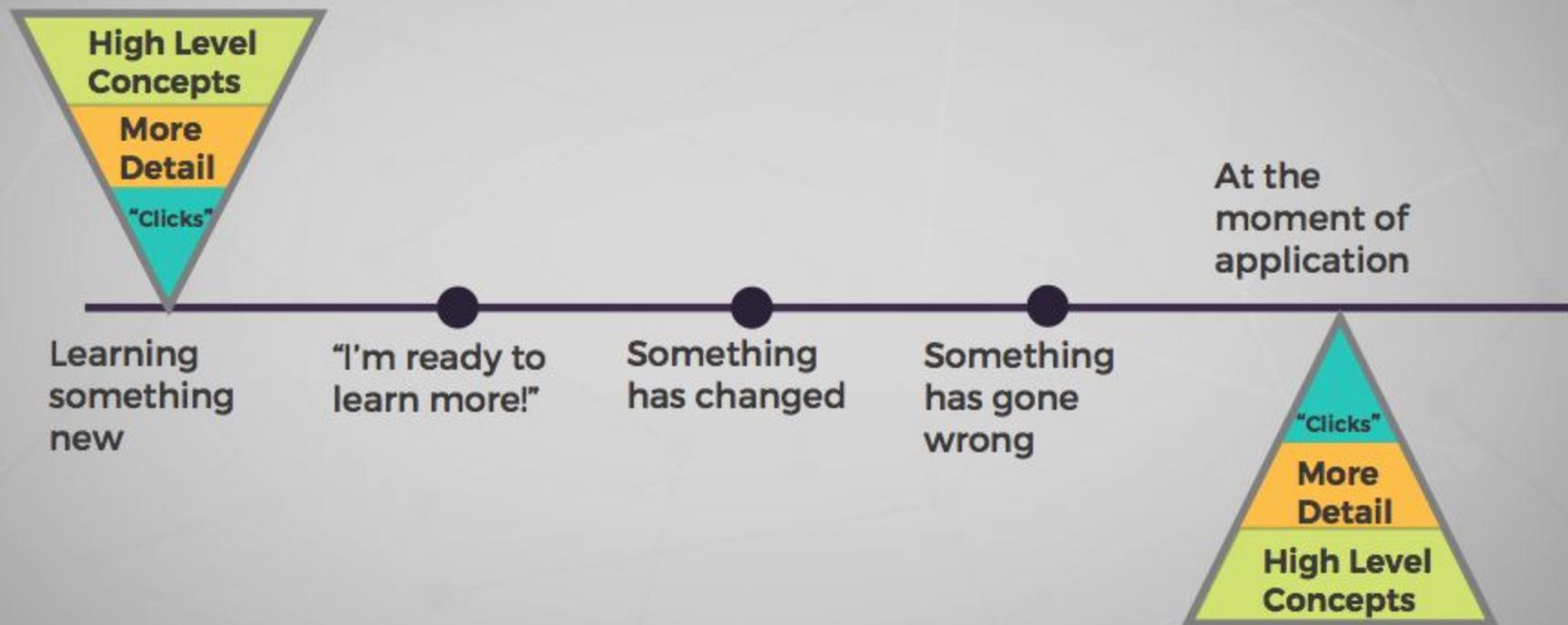
Starting with first login, the in-software learning experience content will educate users on the value of PI and provide them with a path forward on how to use the tool to solve their business goals.

As users progress throughout their journey, they will be provided with just-in-time content that helps them accomplish tasks and gain awareness of everything that PI has to offer (additional learning content, features/functionality, etc).

Overall, learning experience content paired with an impeccable product, customer success, and support will encourage users to feel confident, excited, and energized. Users will want to return to the software and share their insights with others.

# How will LXD do this?

# 5 MOMENTS OF LEARNING NEED



# Moment of Need: **New**

Users are learning something new for the first time.

<b>Examples</b>	<b>Solution</b>
<b>New user, first login</b> <i>(onboarding experience)</i>	<ul style="list-style-type: none"><li>● In-software setup flows that asks questions/walk through screens to configure account preferences and profile</li><li>● Guide center with “getting started checklist” that launches into Pendo guided tours</li></ul>
<b>New feature release</b>	<ul style="list-style-type: none"><li>● Release messaging in the form of in-software flows and/or Pendo lightboxes outlining the value behind new features/functionality &amp; how users can move forward</li><li>● Link to additional resources (Catalyst, etc.)</li></ul>

# Moment of Need: **More**

Users are looking to find more about PI from learning how to use PI to solve a business problem or knowing more about a product feature, or functionality.

<b>Examples</b>	<b>Solution</b>
<b>User looking to find out more about PI product, methodology, feature, etc.</b>	<ul style="list-style-type: none"><li>• In-software links to additional content (Catalyst, workshops, elearning, etc)</li><li>• In-software text, tooltips, callouts explaining the big “why” behind features, functionality, etc.</li></ul>

# Moment of Need: **Change**

Something's changed from a way the users have done tasks in the software before.

<b>Examples</b>	<b>Solution</b>
<b>New feature release</b>	<ul style="list-style-type: none"><li>● Release messaging in the form of in-software flows and/or Pendo lightboxes outlining the value behind new feature &amp; how users can move forward</li></ul>
<b>New way of performing tasks (new JA Flow)</b>	<ul style="list-style-type: none"><li>● Link to additional learning resources (catalyst, workshops, etc)</li></ul>

# Moment of Need: **Solve**

Users need to solve an issue within their organization or with the software itself.

<b>Examples</b>	<b>Solution</b>
<b>Users don't know how to perform task in the software</b>	<ul style="list-style-type: none"><li>● Question mark icon that opens guide center or “help center” with guided tours, searchable knowledge base, resources, etc.</li></ul>
<b>Users need to solve issue in organization</b>	<ul style="list-style-type: none"><li>● Link to additional learning content (workshop, catalyst, etc)</li></ul>
<b>Software has a bug/issue with the software</b>	<ul style="list-style-type: none"><li>● Software messaging via Pendo banner, software status e-mails, etc.</li><li>● Provide relevant links to additional support content (service desk, knowledge base, catalyst)</li></ul>

# Moment of Need: **Apply**

Users want to apply what they learned and perform actual tasks within the software.

<b>Examples</b>	<b>Solution</b>
Users are looking to perform tasks in the software	<ul style="list-style-type: none"><li>● In-software text, tooltips, and callouts identifying the steps users need to take to perform tasks</li><li>● Guided tour walkthroughs</li><li>● Knowledge base accessed via question mark</li></ul>