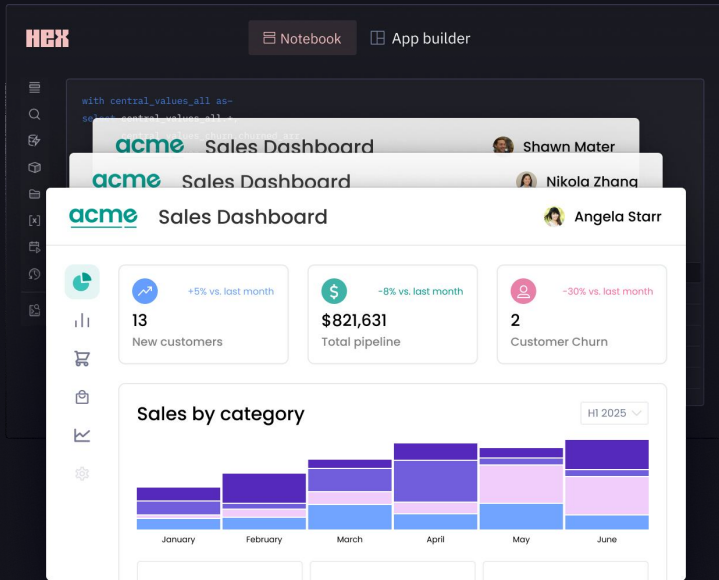


Playbook for evaluating embedded analytics



Built for fast—moving teams to drive growth

Seamlessly embed powerful data experiences for your customers with Hex embedded analytics.



Ship faster

Use Hex's fast, flexible notebook to deliver data insights to your customers in minutes instead of weeks or months.



Make it yours

Customize your embedded app for a white-labeled user interface, indistinguishable from the rest of your product.



Easy, breezy integration

Light-weight and easy to use, the Hex Embed API is designed for developer-friendly implementation.



Low floor, high ceiling

Build one project to power tailored data apps for all your customers, and scale as you grow new revenue streams.

Evaluation Rubric

01 Identify key stakeholders early

- ☐ Understand each stakeholder's pain points and what success looks like for them.

02 Articulate the WIIFM

Clearly show each team "What's In It For Me?"

- ☐ Product: A win for reduced user friction and greater client visibility into Candidly's impact.
- ☐ Engineering: Hex has clear documentation, robust information security programs, and a valuable trial period. But the main seller: relatively minor code edits for a major feature enhancement.
- ☐ Customer success: A drastic reduction in managing client Hex accounts and simplified onboarding.
- ☐ Data team: The power to reuse a single, dynamic template report across multiple clients instead of building and maintaining bespoke dashboards.

03 Share your vision

- ☐ Introduce the idea internally to gather feedback and identify champions.
- ☐ Walk the team through the current user experience, and present the hard data to quantify the problem you're trying to solve.

04 Jump into a POC with a plan

- ☐ Assess your engineering bandwidth to scope the Proof of Concept.
- ☐ Share documentation snippets with engineering — don't assume it's easy, but highlight those surprisingly minimal code changes.
- ☐ Ship iteratively, starting with your most critical use case.
- ☐ Go beyond documentation to create mockups that help stakeholders visualize the embedded experience.

05 Keep open communication channels

- ☐ Set up a dedicated Slack channel.
- ☐ Create a project doc with ongoing notes, Q&A sessions, key discoveries, divided responsibilities, and evolving timelines.

06 Test cross-functionally

- ☐ Get Product and Customer Success to test the UX.
- ☐ Ask questions: Does this blend with our portal experience? Would clients know how to interact with this? Does it feel right?

07 Lean on your vendor

- ☐ Leverage the Hex team for best practices, feedback, and suggested improvements.