

Optimizely

Recommendations

Service Description

Updated: July 23rd 2024

1. Overview

These products enable the client to personalize each visitor's online experience, one-to-one and in real time across all channels including but not limited to online, mobile, email, in-store, call center, personalized catalogs and print.

Individuals see content and product suggestions, messages, promotions, images and banners that are personally relevant to them. When used with Optimizely Search & Navigation, the individual will experience a personalized ranking within the search results. The result is a proven model for increased conversions and a better, richer experience for customers.

1.1 Optimizely Product Recommendations Subscriptions

By applying machine learning and statistical analysis to behavioral data, the Personalization Engine uses visitor behavior to autonomously create and optimize individual product recommendations that can be retrieved either via the native integration package or using bespoke implementations towards the Service APIs.

6 merchandising widgets with pre-canned algorithm strategies are included in the initial onboarding process. These can be integrated to by developers connecting to each widget from a section in the website experience. An Instance of the Product Recommendations service means a working segmented environment with associated access controls that serves to organize a single tracking end point, one logical data store, multiple login access to the Personalization portal for personalization strategies and rules, and access to reporting for a single Instance.

“Personalization Portal” means a web-based interface that enables the customer’s use of performance reports, merchandise rule creation, and triggered emails. The actual price parameters are captured in the Order Form when signing a contract. Please contact your sales representative for available tiers and parameters.

1.2 Optimizely Email Triggers Subscriptions

By applying machine learning and statistical analysis to behavioral data, the Personalization Engine uses visitor behavior to autonomously create and serve every recipient of Customers email communications with dynamically generated, personalized product recommendations in the body of the email. Optimizely Email Triggers can be used in marketing campaigns, and in transactional and automated triggered emails such as abandoned basket, welcome messages, order confirmation, order dispatched messages, to name a few.

The actual price parameters are captured in the MSA when signing a contract. Please contact your sales representative for available tiers and parameters.

1.3 Optimizely Content Recommendations Subscriptions

By applying machine learning and statistical analysis to behavioral data, the Personalization Engine uses visitor behavior to autonomously create and optimize individual content recommendations that can be retrieved either via the native integration package or using bespoke implementations towards the Service APIs.

1.4 Episerver Personalized Search and Navigation Subscriptions

By applying machine learning and statistical analysis to behavioral data, Personalized Search and Navigation allows attribute boosting tailored for each individual visitor to optimize the ranking of the search results returned by Optimizely Search and Navigation. Optimizely Search and Navigation is a prerequisite to subscribe to this Service.

The actual price parameters are captured in the MSA when signing a contract. Please contact your sales representative for available tiers and parameters.

2. Definitions

2.1 Subscription

Means the arrangement by which Customer is granted access to a feature of the Personalization Service and the tracking infrastructure required to drive personalized recommendations and/or behavioral triggers.

2.2 Transactional Email

Means emails Customer sends through the Subscription email service.

2.3 Business Day

Means every day from Monday to Friday except 1) if Customer's primary business is domiciled in the Americas - Public / Federal holidays in the United States of America, 2) if Customer's primary business is domiciled in Europe, Africa or the Middle East – Public holidays in Sweden and Germany, or 3) if Customer's primary business is domiciled in Asia-Pacific, including Australia and New Zealand – Public holidays in Australia.

2.4 Usage and Overage Terms

All terms are described in <https://www.optimizely.com/legal/product-supplement/Metrics-and-basic-items>

3. Service Architecture

3.1 Instances

All Subscriptions include one or more Instances. These can be used to align with deployment stages, for example in any of the stages below.

If Customer is managing different countries in a single Personalization Instance, an Authorized User working on a particular instance has access to all personalization activities for other countries within the Personalization Instance. If Customer is managing each country, in a different Personalization Instance, then Authorized Users working on a particular country can only see marketing activities for that country. Customer may purchase additional Personalization Instance(s).

3.1.1 Integration stage

Supporting integration environments such as daily builds or continuous releases. Here customers can validate initial integrations with external systems and perform functional testing.

3.1.2 Pre-production stage

A limited version of the Personalization Service is made available for use during pre-production development and UAT. Test environments do not provide sufficient tracking data for the Optimizely Personalization algorithms, so personalized recommendations output and behavioral triggers are not fully functional.

3.1.3 Production stage

Once the Customer implementation is production ready, the full-scale Personalization Service tracking is enabled. If the tracked data is adequate, personalized recommendations, mail and behavioral triggers can be enabled when tracking is enabled. Otherwise additional data in the form of historic orders could be imported to increase relevancy.

3.1.4 Developer Guidelines

See the [Optimizely Developer Guides](#) on Optimizely World for information about developing, deploying, and working with the Personalization Service.

4. Service Requirements

Optimizely Personalization works best integrated with the Optimizely platform, but some features are also available to run stand-alone.

4.1 Optimizely Product Recommendations

Product recommendations can be served using the native integration package with Optimizely Commerce or with a custom implementation with another commerce system, if an Optimizely Personalization digestible product feed export can be produced.

4.2 Optimizely Email Triggers

Optimizely Email Triggers consists of two parts; first, product recommendations displayed as a part of e-mail content, and second, triggering of transactional e-mails.

4.2.1 EMAIL Product Recommendations

E-mail based product recommendations can be served using the native integration package with Optimizely Commerce or with a custom implementation with another commerce system, if an Optimizely Personalization digestible product feed export can be produced.

4.2.2 Triggers

Behavior-based e-mails can be triggered from using the native integration tracking package or with an Optimizely Personalization compatible tracking implementation.

4.3 Optimizely Content Recommendations

Content recommendations can be served using the native integration package with Optimizely CMS and Commerce. Content syncing must be in place from the CMS to the content service.

4.4 Episerver Personalized Search and Navigation

Individualized search result rankings via personalized attribute boosting from Personalized Search and Navigation requires the Optimizely Search and Navigation Software Service and Optimizely Content or Commerce Clouds along with the native integration tracking packages.

5. Features of the Personalization Service

The features of a Personalization Subscription may vary depending on the chosen Features.

5.1 Optimizely Product Recommendations

Optimizely will provide services to the Customer which will enable the Customer to display suitable product recommendations via the native integration package or via custom implementations towards the Product Recommendation Service API. Capabilities included in Customer's Perform Subscription include:

- Omni-channel tracking into the Personalization Engine
- Product recommendations

5.2 Optimizely Email Triggers

Optimizely will provide services to the Customer that will let the Customer display suitable recommendations within the content of messages in an e-mail campaign and create transactional e-mails that can be used to re-engage visitors on e.g. abandoned baskets.

Capabilities included in Customer's Reach Subscription include:

- Omni-channel tracking into the Personalization Engine
- Templated product recommendations for use as part of e-mail content in campaigns
- Behavioral transactional e-mail triggers

5.3 Optimizely Content Recommendations

Optimizely will provide services to the Customer which will enable the Customer to display suitable content recommendations via the native integration package. Capabilities included in Customer's Advance Subscription include:

- Omni-channel tracking into the Personalization Engine
- Content recommendations

6. Consulting and Training

6.1 Expert Services

Optimizely's Expert Services team help ensure that customers and partners are successful in implementing Optimizely's Personalization features. Expert Services is a global team of consultants who can be contracted to provide best practices guidance or hands-on support to assist the project team in deploying successful projects with Personalization Software Services.

Expert Services can perform many services including for example: Tuning the algorithms to specific customer needs. Or onboarding additional Personalization Instances for a customer.

Contact Optimizely Expert Services by email expert.services@Optimizely.com

6.2 Onboarding

Upon signing up for the Personalization Service an Optimizely project manager will be assigned and notified. The on-boarding process is started in a project kickoff. During this meeting, the Optimizely project manager will provide the Customer with an overview of the service and on-boarding process and to gather client requirements for the use and configuration of the service. The Optimizely project manager will also ensure that the Customer receives access to Software Services included in the Subscription and provide advice on recommended integration approach and relevant documentation.

During the Project Kickoff, all parties involved in the project will agree on a communication plan to track progress, recommend use of the software, testing methodology and initial go-live plans. This helps the project moving forward as expected and ensures Optimizely is prepared to support the live production system.

6.3 Training and online help

Optimizely offers both business user and developer training at an additional cost. Training may be ordered from an Optimizely sales representative.

Optimizely also offers [online help](#) and has a robust community of active members at [Optimizely World](#).

7. Optimizely Support

Please refer to the [Optimizely Support Policy](#) for more information.

8. Service Health and Continuity

The Personalization Service infrastructure is designed to be resilient and has no single point of failure. The network, data storage, hardware and power components are designed to be fully redundant and monitored, see 8.4 for details. If the service fails at any point in time, failover mechanisms are in place that will be either automatically deployed to restore the service or manually restored. MTBF is approximately 200 days depending on the cause of services failure.

Optimizely provides a [service dashboard](#) where Customer can register to receive incident updates and view information about platform-wide planned maintenance.

Optimizely Managed Services and Support communicates incidents regarding Customer-specific applications and websites. Customers are notified by email regarding issues and are continuously updated during the progress of the incident.

More details can be found in the [Optimizely Service Continuity Policy](#). Data retention is defined in our [Data Retention Policy](#).

8.1 Backup copying and loss of data

Optimizely takes the responsibility that backup copies of the production data in the Subscription are made daily. Optimizely takes the responsibility that such backup copies are saved with Optimizely for thirty-five (35) days. Thereafter Optimizely does not take any responsibility for the backup copied information.

8.1.1 Additional backup

If Optimizely shall take responsibility for the backup copying of other data and/or to any other extent than that stated in the Service Description, such obligation shall be specifically agreed in writing between Optimizely and the Customer.

8.1.2 Responsibility for loss or distortion of data

Over and above the responsibilities that Optimizely has taken on in accordance with section 8.1, Optimizely does not take any responsibility for any loss or distortion of information/data.

8.2 Backup and Retention Schemes

The Customer data is backed up every twenty-four (24) hours with monitoring and verification. The daily backups are all restored to a server in production, with reports kept for two weeks. The daily backup is kept in the production cluster. Historic backups are archived for 35 days, to ensure availability of the backups in the event of disaster.

8.3 Disaster Recovery

Depending on the cause, the maximum time generally required to restart the service in an outage is 4 hours and the maximum time of changes that may be lost is 24 hours. See Backup and Retention Schemes above for further details.

8.3.1 Recovery Point Objective (RPO)

RPO is 24 hours.

8.3.2 Recovery Time Objective (RTO)

Please refer to the Optimizely Services SLA for target objectives.

8.4 Monitoring

Service health is monitored continuously, and any irregularities will be acted upon in line with the Service Level Agreement.

9. Programs for services and features in Beta and Limited Availability

9.1 Beta and Limited Availability

Optimizely may offer “alpha,” “beta,” or other early-stage Software Service, integrations, or features (“Beta Programs”), which are optional for Customer to use. We provide customers who participate in our Beta Programs the opportunity to test, validate, and provide feedback on future functionality. Feedback gathered during this phase helps us to determine which features and functionality provide the most value to our customers and helps us focus our efforts accordingly.

Optimizely may also offer Customers access to a limited-availability version of the Software Service, including certain proposed new features, functionalities or capabilities (“Limited Releases”). Limited Releases are pre-production releases, intended for later general Customer access and use, but pending fine tuning, testing and other feedback.

Access to and use of Beta Releases and Limited Releases is optional. Optimizely makes no promises that future versions of Beta Releases and Limited Releases will be released, or will be made available under the same or similar commercial, or other, terms.

Beta Releases and Limited Releases may not be complete or fully functional and may contain bugs, errors, omissions, and other problems for which Optimizely will not be responsible. As such, use of Beta Releases and Limited Releases is done at the Customer's own risk.

Optimizely may terminate Customer's right to use any Beta Releases and Limited Releases at any time at Optimizely's sole discretion, without liability.

The guidelines and requirements for Beta Releases and Limited Releases are described in the [Beta Terms](#).

10. Service Level Agreement

Please refer to the [Optimizely Services SLA](#) for more information.

11. Roles and Responsibilities

See the [Roles and Responsibilities Matrix](#) for more information.

12. Compliance

For information about compliance see the [Optimizely Trust Center](#). Optimizely Personalization Services follow Microsoft Azure compliance standards, and therefore our infrastructure has a wide range of compliance certifications, standards, and supporting processes.

12.1 Data Privacy

Processing and/or storing PII data is not allowed in the Optimizely Personalization Services.

13. Ordering and Validity

13.1 Ordering of the Service

When a Customer places an order with an Optimizely sales representative, Optimizely provisions the systems. Contact your Optimizely sales representative or the [local office](#) to order.

13.1.1 Provisioning time

If all necessary data to provision this Software Service(s) has been included in the Order, Optimizely has a target of provisioning the Customer's Software Service(s) within 24 hours during business days after the Order has passed all checkpoints within the Order Management System and reached Optimizely Managed Services.

13.2 Validity and duration of the Service Description

This Service Description shall remain valid as a description of Software Service(s) a Customer may purchase and/or receive from Optimizely through the term of any related agreement

between the parties, and may be subject to further updates, under the notice provisions of such agreements. Under such notice provision, Optimizely reserves the right to update or replace it as necessary at any time. Changes made to the Service Description or any new Service Description (for example, a replacement of the previous one) shall always enter into force from the date of their publication on the page, or from such notice provision in the agreement, which may apply. <http://world.optimizely.com/services/descriptions/optimizely-recommendations-service-description>

Appendix 1 - Changelog summary for Personalization Service Description

In this appendix you will find a summary of the changes that were communicated at times defined below. However, since clarifications may have been made in addition to the changes made in this appendix, it is still important that you read through the relevant Service Description(s).

Changes for distribution May 7th, 2024

Brand Change

- Misc small changes, replacing links