

# Optimizely Experimentation Service Description

Updated: September 13, 2024

## 1. Subscription Descriptions

### 1.1 Web Experimentation and Personalization

“Web Experimentation” is an Optimizely Service designed to help Customers test website experiences they deliver through Customer Properties. “Optimizely Personalization” is an Optimizely Service designed to help Customers personalize the experiences they deliver through their Customer Properties. To use the products, the Customer first installs the applicable Optimizely Snippet on licensed Customer Properties, then uses the product’s editing and configuration tools to select Content to test and to configure test or personalization campaign parameters. Optimizely Personalization uses Visitor Data and other Customer Data to determine what Content variations to display to Visitors. Tests and campaigns are designed to help Customers gain actionable insights about their Content. Web Experimentation and Personalization may be stopped at any time, in which case the Content variations will no longer be displayed to Visitors.

### 1.2 Feature Experimentation & Progressive Delivery

Feature Experimentation is an Optimizely Service designed to give Customers the ability to create feature flags and run experiments anywhere within the Customer Property technology stack. To use Feature Experimentation, Customer needs to install the applicable Optimizely X software development kit (the “Optimizely Feature Experimentation SDK”) within its Customer Property technology stack. The Customer can then begin to track events with and view results in the Optimizely Service. Feature Experimentation is deemed to be the Optimizely Service.

## 2. Features of the Experimentation Service

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

## 2.1 Web Experimentation

Optimizely will provide services to the Customer which will enable the Customer to build and launch various experiments within the context of a browser. Capabilities included, depending on package, in Customer's subscription include (among others):

- Visual Experiment Editor
- Automated experiment results analysis
- Experiment Targeting Options
- Audience Builder
- Security and Administrative Control
- Omni-Channel Event Tracking Capabilities
- 3<sup>rd</sup> Party Analytics and Audience Integrations
- Experiment Preview Mode

## 2.2 Web Personalization

Optimizely will provide services to the Customer that will let the Customer personalize the experiences they deliver through their Customer Properties. Capabilities included, depending on package, in Customer's subscription include (among others):

- Visual Campaign Editor
- Automated campaign results analysis
- Targeting Options (incl. behavioral targeting)
- Security and Administrative Control
- Audience Builder
- Omni-Channel Event Tracking Capabilities
- 3<sup>rd</sup> Party Analytics and Audience Integrations
- Campaign Preview Mode

## 2.3 Feature Experimentation

Optimizely will provide services to the Customer which will enable the Customer to control their application using feature flags and run experiments across all implemented channels. Capabilities included, depending on package, in Customer's subscription include (among others):

- Access to SDKs for >12 programming languages
- User interface to configure feature flags, feature variables, rollouts, and experiments
- Attribute targeting capabilities

- Configuration of arbitrary development environments
- Automated results analysis
- Security and Administrative Control
- Audience Builder
- Omni-Channel Event Tracking Capabilities
- Webhooks

## 2.4 Experiment Collaboration

Optimizely will provide services to the Customer which will enable the Customer to manage their experiment ideation, planning, and hypothesis-creation process. Capabilities included in the Customer's subscription when customer is using an eligible tier (among others):

### Workflow Management and Approvals

- Create workflows and codify the experimentation process
- Assign approvers to have confidence that all experiments are well-designed

### Test Planning and Collaboration

- Document test design parameters using a structured template
- Embed design files from Figma and InVision and directly annotate on screenshots

### Project Orchestration

- Track workflow steps in the design, build, and launch of an experiment
- Orchestrate the program easily using the calendar, timeline, and board views
- Customize and save these views to share with other stakeholders

## 3. Optimizely Products Available to use with Experimentation

### 3.1 Optimizely Data Platform (ODP) and CDP Audience Sync

Optimizely Data Platform (ODP) and CDP Audience Sync, an ODP product (both a subject to payment of subscription fees), are available to integrate with Web and Feature Experimentation to enable advanced audience targeting within experiments by using Real-Time Segments (RTS). Details about usage, scope, and functionality can be found in the [Optimizely Data Platform Service Description](#), with details about CDP Audience Sync in Section 1.8, and additional data compliance considerations in Section 9.

## 4. Consulting and Training

### 4.1 Expert Services

Optimizely's Expert Services team help ensure that customers and partners are successful in implementing Optimizely's Experimentation and Progressive Delivery 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: Designing the architecture for optimal implementation of Feature Experimentation. Or creation of experiments on behalf of the customer.

Contact Optimizely Expert Services by email at [expert.services@optimizely.com](mailto:expert.services@optimizely.com) or [online](#).

### 4.2 Onboarding

Onboarding is a pre-paid pre-defined scope-limited professional service that Optimizely provides Customer as part of the Software Service if Subscribed. It provides for a technical overview for configuration, implementation support, and a pre-launch checklist.

Onboarding is purchased as limited number of hours, with a fixed validity period as set out in the applicable Order Form. Onboarding hours can be utilized only for the Software Service that Onboarding was purchased. At the end of that period, unused Onboarding hours expire. Unused hours cannot be rolled over, or re-purposed for any other Software Service. It is the responsibility of the Customer to manage and monitor its Onboarding hours. Optimizely will provide a status of Onboarding hours upon request. Additional Onboarding hours can be purchased at Optimizely's then current fees.

Upon signing up for the Web Experimentation or Feature Experimentation service an Optimizely project manager will be assigned and notified. The onboarding 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 onboarding 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.

## 4.1 Education, 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 or from the [Optimizely website](#).

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

If the Customer is purchasing an Education Subscription Service: Customer attendees cannot be reassigned during the Subscription Term unless express prior authorization is provided by Optimizely. Customer has six months from the Effective Date to register for that Service (“Registration Period”). For clarification, Education Subscription Services are deemed complete for the then Contract Year if Customer does not register during the applicable Registration Period.

## 5. Support

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

## 6. Service Health and Continuity

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

Optimizely communicate 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](#).

### 6.1 Service Window and Patching

#### 6.1.1 Service Maintenance

Optimizely performs service maintenance and upgrades during a Routine Maintenance Window between the hours of 8am and 8pm EST, unless deferral of such maintenance or upgrades to

the would materially and adversely affect performance or security of Company's network or data center.

Optimizely endeavors to perform such maintenance or upgrades in such a manner to not adversely impact Customers. Notwithstanding the foregoing, planned downtime may occur when Customer has no access to the software due to scheduled maintenance and application upgrades (“Planned Downtime”). To the extent possible, Company shall notify Customer as far in advance as practicable of any maintenance or upgrades outside of the Routine Maintenance Window.

## 6.2 Service Level Agreement

See [Optimizely Service Level Agreement \(SLA\)](#).

## 6.3 Roles and Responsibilities

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

# 7. Compliance

See the [Optimizely Trust Center](#) for more information.

## 7.1 Privacy, Security, and Transparency

See the [Optimizely Trust Center](#) for more information.

# 8. Ordering and Validity

## 8.1 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.

### 8.1.1 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.

## 8.2 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. [Service Description Home](#)

## 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 on 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 on Optimizely World.

### **9.1.1 Optimizely SLA**

Beta Releases and Limited Releases are excluded from any Optimizely SLA. Any unavailability related to such use is excluded from any SLA Availability calculation.

### **9.1.2 Warranties and Indemnities**

Optimizely's warranties and indemnities under the End User License Agreement do not apply to Beta Releases and Limited Releases.

### **9.1.3 Support**

Optimizely may use good faith efforts in its discretion to assist Customer with Free Beta Releases and Limited Releases but has no contractual obligation to provide that support for Beta Releases and Limited Releases.

## **Appendix 1 - Changelog summary for Optimizely Experimentation 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 Oct 26, 2023**

Update to SLA info.

### **Changes for distribution Aug 1, 2023**

Included Experiment Collaboration definition.

### **Changes for distribution Sep 13, 2022**



Updated links to policy documents

## **Changes for distribution Jun 23, 2022**

Updated with new format