Service Description for Optimizely Marketing Automation Service

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1. Service Description

Optimizely Campaign is a Software as a Service (SaaS) solution for omnichannel marketing. It enables the Customer to send advertisements, newsletters, or other information in electronic format to the Customer's contacts (contractual partner, interested parties etc.) and to evaluate this dispatch using statistics.

2. Features of the Campaign Service

The fundamental features of a Campaign Service Subscription may vary depending on the chosen Subscription type.

2.1. Campaign Management

Campaign provides various tools for orchestration of campaign strategies. Setup classic newsletter campaigns as well as trigger-dependent marketing automations. For mailings in regards of a transaction Campaign provides transactional messages that can be triggered via API. For handling subscription and managing consent for messaging confirmation mailings (in conjunction with opt-in processes) are included in the service.

- One-shot campaigns
- Marketing automation
- Transactional messages
- Confirmation mailings

These electronic messages can be sent via various channels. Depending on regional availability, these are the following channels: email, SMS, mobile push, browser web push and print mailings.

2.2. Built-in content management features including flexible templates

The design of mailings can be done without any knowledge of HTML programming. The template is fully customizable and flexible to meet the layout and look the Customer wants.

2.3. Segmentation

Following segmentation tools are available:

- Target groups

Target groups are subsets of your recipients defined by specific rules and conditions. Each target group may contain several rules and conditions and a logic relation between them.

- Click Profiles

Click profiles allows automatic generation of target groups. The clicks users make are the basis for click profiling and the user gets added to corresponding profiles.

2.4. Analysis tools

With Campaign the Customer gets a quick overview of standard KPIs per campaign or can setup own custom reports and automatically export them for further analysis in Excel or other tools. Among the analysis tools Campaign offers an email preview feature (deliverability preview) which is powered by a third-party provider and relies on their service and operations.

2.5. Recipient management

End user data can be imported in recipient lists. The lists can be filtered based on target groups and the result can be exported for further processing in Customer's system.

Optimizely enables the Customer to manage the Campaign lifecycle for individual recipient. It is accomplished by following tools:

- Opt-in processes
- unsubscribe processes
- blacklist handling
- bounce management

2.6. APIs (SOAP, REST, HTTP)

Connect Customer's system and product to Campaign system is possible through a set of APIs. This connectivity enables Customer to manage recipients, campaigns or transactional messages from external system.

In addition to Optimizely Campaign, Optimizely also offers services that support the Customer when using Campaign. The scope of the service is captured in the MSA when signing a contract. Contact your sales representative for available tiers and parameters.

3. Optional Extras

Customer may elect to receive the following Optional Extras. In the event the Customer elects to receive any Optional Extras, the parties shall discuss and negotiate relevant terms in good faith.

3.1. Integrations to CRM systems

Integration to common CRM systems are offered to connect the Campaign Service with a business CRM system.

3.2. Integration to Web Analytics tools

Leading Web Analytics solutions can be integrated to expose tracking event to external tools for further analysis.

4. Consulting and Training

4.1. Campaign Accelerator

For all new projects using the Campaign Service, the Campaign Accelerator is part of the on-boarding process.

4.2. Training and online help

Optimizely offers business user training at an additional cost. Training may be ordered from an Optimizely sales representative or from the self-service website.

Optimizely also offers online help and has a robust community of active members at Optimizely World.

5. Optimizely Support

Please refer to the Optimizely Services SLA for more information.

6. Service Health and Continuity

6.1. Service Monitoring

Optimizely Campaign is ISO-27001 certified and has internal policies to comply with regulations. Including for example: real-time and extended monitoring, connected to central monitoring.

6.2. Service Resilience / Fault tolerance

All components of the service are implemented to ensure scalability, reliability and high availability.

6.3. Backup and restoration

The Optimizely Campaign service includes a data protection and recovery process to protect stored data.

6.4. Disaster Recovery

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Processes are in place to ensure the continuation of operations under exceptional circumstances. This includes coordination across customer service, product development and system administration.

7. Service Level Agreement

Please refer to the Optimizely Services SLA for more information.

8. Roles and Responsibilities

Each user that gets access to the Campaign service gets assigned to a specific user role. These roles have different permissions. For these user accounts the Customer shall take the necessary precautions to prevent the use of Campaign by unauthorized persons. This includes in particular the secure use of passwords. The Customer shall be responsible for ensuring that Campaign is not used for illegal purposes, insofar as it is responsible for this.

See the Roles and Responsibilities Matrix for more information.

9. Compliance

For information about compliance see the Optimizely Trust Center. Optimizely Customer-Centric Digital Experience Platform Service follows Microsoft Azure compliance standards, and therefore our infrastructure has a wide range of compliance certifications, standards, and supporting processes.

9.1. Data Privacy

Optimizely allows you to process and/or store PII data but not sensitive personal information (as defined by EU GDPR) in the Campaign Service.

Customers who require additional controls relating to protecting provided PII data can opt for the Geofencing optional configuration. If PII data is stored and/or processed, Optimizely can provide a geo-fenced option to help provide compliance with Schrems ii legislation. This option changes certain aspects of the Service Level Agreement (SLA) around support hours and response times. Please content your salesperson or Customer Success Manager if this is of interest.

10. Ordering and Validity

10.1. Ordering of the Service

When a Customer places an order with an Optimizely sales representative, Optimizely provisions the systems. Please contact your Optimizely sales representative or the local office to order.

Upon signing up for the Service an Optimizely project manager will be assigned and notified. The Optimizely Account Executive will schedule a Project Kickoff call to begin the customer onboarding process. The Project Kickoff meeting will provide the customer with an overview of the service, general service process review (e.g. how to register a ticket), review of project objectives, tips on getting started, and contact methods. The Project Manager will also ensure that the customer receives access to the Service. Note that access is automatically sent to the customer technical contact within three (3) business days of Service being provisioned.

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

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10.2. 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-marketing-automation-service-description/.

Appendix 1 - Changelog summary for Optimizely Customer-Centric Digital Experience Platform 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 Aug 2nd, 2021

Brand Change

- Changed brand from Optimizely to Optimizely throughout.

Changes for distribution October 2nd, 2019

Section 1.1, Campaign Management

- Added definition of regional channels.

Section 2.4, Analysis tools

- Added information about the delivery preview capability.