Roles and Responsibilities Matrix for Optimizely Services

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1. RACI for Optimizely Services

This Roles and Responsibility Matrix represents roles and responsibilities of Optimizely Services. Document will be updated during the service operation. Service processes are based on ITIL and task responsibilities are presented with following:

R = **Responsible**

A = **Accountable**

C = **Consulted**

I = **Informed**

2. Supported Services

2.1 The Software Services supported are:

Software Services	
Content Marketing Platform	AKA Marketing Automation
Content Cloud	
Search & Navigation	
Commerce	B2C Commerce
	B2B Commerce
	PIM
	B2B Analytics
Marketing Automation	AKA Campaign
Recommendation Services	Product Recommendations
	Content Recommendations
	Email Recommendations
Data Platform	ODP
	OCP
	OJO
Community API Service	

2.2 The Managed Services supported are:

Service	
Hosted Services	Everweb Hosting
	Ektron Hosting

3. Definitions

	Name	Definition
3.1 3.1	3.2 A = Accountable	The one ultimately answerable for the correct and thorough completion of the deliverable or task, and the one who delegates the work to those responsible. There can only be one Accountable so in tasks in Matrix below where 2 Accountables can be found the ultimately answerable must be defined in a separate agreement between those parties.
3.3 3.2	3.4 Application	An application program (app or Application for short) is a computer program designed to perform a group of coordinated functions, tasks, or activities for the benefit of the user.
3.5 3.3	3.6 C = Consulted	(Reviews) - Those whose opinions are sought. Two-way communication.
3.7 3.4	3.8 Designee	Customer's Affiliates' employees, consultants, contractors or agents who are authorized to work the Service and have been supplied a user identification and password by Customer (or by Optimizely at Customer's request).
3.9 3.5	3.10 Incident	Any event which is not part of the standard operation of the Service and which causes or may reasonably be expected to cause, an interruption to, or a reduction in the quality of, the Service. Incidents have four (4) levels of prioritization depending on the severity and urgency related to the Service.
3.11 3.6	3.12 I = Informed	Those who are kept up-to-date on progress (often only on completion of the task or deliverable). One-way communication.
3.13 3.7	3.14 Problem	The unknown root cause of one or more incidents.
3.15 3.8	3.16 R = Responsible	(Creates) - These people are the "doers" of the work. They must complete the task or objective or make the decision. There can be multiple resources responsible.
3.17 3.9	3.18 Service Request	Is defined as industry standard tasks that periodically arise with Customer's use of the Service(s), which relate to an agreed lead time between Customer and Optimizely ("Service Request"). Example of Service Requests include, but are not limited to, changes in Optimizely Software Platform(s) configuration, deployment of new or edited code, and change of password. Service Requests are handled by Optimizely Service Desk at the commencement of the Order(s).

4. RACI Matrix

• **Service desk and system support**	Designee	Customer	Optimizely	Additional information / Notes
Create support ticket	R, A, I	R, A	-	Designee need approval from Customer towards Optimizely contact. R, A is an agreement between Customer and Designee in case a Designee is involved
Customer User support	C	R, A	-	
Customer end user support	C	R, A		
Applications support	R, A	-	-	Key users contact Designee Service Desk (tel., ticketing system, email), Key User support may be channeled via Customer Service Desk Note: Optimizely offers Application Support for Key Technical contacts developing on Optimizely
• **Service operation**				
o **Incident management**	Designee	Customer	Optimizely	Additional information / Notes
Resolve an Incident (service interruption)	C	I	R, A	
Incident logging and categorization.	C	I	R, A	
Incident reporting.	C	I	R, A	
o **Problem management**	Designee	Customer	Optimizely	Additional information / Notes
Troubleshooting of custom Optimizely application implementation.	R, A	C	C	Designee or the Customer's own developers are responsible for troubleshooting the specific application implementation. Optimizely can provide detailed logs or temporary access to environments.
Resolving of software bugs in custom implementation application.	R, A	C	I	
Reporting of bugs in Optimizely software.	R, A	C	I	
Resolving bugs in Optimizely software.	C	I	R, A	
Root cause analysis (RCA) of software issues based on Customized code.	R, A	C	I	
Root cause analysis (RCA) of software issues in Optimizely source code.	C	I	R, A	
Root cause analysis (RCA) of platform issues.	C	I	R, A	
o **Change management**	Designee	Customer	Optimizely	Additional information / Notes
Requests to make configuration changes to the Integration environment.	R, A	C	I	
Requests to make configuration changes to the Pre-Production environment.	R, A	C	I	
Requests to make configuration changes to the Production environment.	R, A	C	I	
Perform deployment of new application from Development environment to Integration	R, A	C	I	
Restore backups to production and pre-production environments.	C	I	R, A	
o **Capacity management**	Designee	Customer	Optimizely	Additional information / Notes
Inform of planned temporary increases in traffic such as campaigns or load tests	R	R, A	I	

	Designee	Customer	Optimizely	
Capacity management and monitoring in production environment	-	-	R, A	Scaling is performed without notification based on need for solution
Capacity management and monitoring in pre-production environment	-	-	R, A	
• **Application management**	Designee	Customer	Optimizely	
Custom implementation of Optimizely software to fit Customer needs	R, A	C	-	
Optimizely version upgrades / patches / security updates to the development environment and deployment to the integration environment	R, A	C	-	
Database optimization and tuning for the application.	R, A		C, I	
User permission management in Optimizely software.	C	R, A	-	
Functional components built on the Optimizely CMS platform	R, A	R, A	I	R, A is an agreement between Customer and Designee in case a Designee is involved
Optimizely source code fixes and security updates				Optimizely releases through nuget feed for Designee to adapt
Proposing new features or changes	C, R	C, R, A	--	
Proposing new CMS versions	I	I	R, A	Based on Optimizely latest release notes
Processing application change requests	R, A	I	-	Evaluating, designing, planning
Launching new Optimizely versions	I	I	R, A	
Developing and deploying new features or changes to the development environment and to the integration environment	R, A	I	I	
Testing application changes (new features, changes, new CMS versions) in the development environment	R, A	I	-	
UAT Testing application changes (new features, changes, new CMS versions) in the integrations environment	C	R, A	I	
Accepting application changes (new features, changes, new CMS version) before deployment to production environment	I	R, A	I	
Requesting new features, changes or CMS versions deployment to the production environment	R, A	C	I	
Customer services change log documentation	R, A	I	-	
Optimizely release notes	I	I	R,A	
Informing End users of new features and CMS versions	C	R, A	-	
Application maintenance specific: Provide corrective maintenance: repair errors or defects in the production system, including related analysis, development and test phases	R, A	I	I	The repair of defects, not identified during the warranty period, to enable Applications that are in production to provide the required functionality and meet service levels.
Application maintenance specific: Provide application preventive maintenance when it is mandatory to ensure the application functioning according to the agreed SLA	R, A	I	I	Preventative maintenance covers events, which if not addressed proactively, could impact Applications in production and deteriorate the level of service as described in the SLAs

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	Designee	Customer	Optimizely	
Application maintenance specific: Provide adaptive maintenance for the application and all software and middleware layers within the Suppliers' responsibility, needed to run the application.	R, A	I	I	Adaptive Maintenance activities ensure that Application performance is not affected by changes to interfacing Applications, new Applications and or packages and technical environment changes, which if not addressed proactively, could impact Applications in production.
• **Application operation**	Designee	Customer	Optimizely	
Optimizely application configuration (web.config) for all environments	R, A	I	I, C	Any configuration relating to the behaviour of the application such as web.config, cache settings or other configuration files required for the application to function as intended.
• **Platform operations**	Designee	Customer	Optimizely	
Antivirus service management and monitoring	C	I	R, A	
Operating system management and security updates			R, A	This is done by Microsoft in an underlying layer without notification
Perform database management and WebApp configuration with Optimizely-services in the development environment and to the integration environment	R, A	-	I, C	
Backup of WebApp and Database			R, A	
Platform hosting specific: Provide corrective maintenance: repair errors or defects in the production system, including related analysis, development and test phases	I	I	R, A	
Platform hosting specific: Provide application preventive maintenance when it is mandatory to ensure the application functioning according to the agreed SLA	I	I	R, A	
Platform hosting specific: Provide perfective maintenance for the application and all software and middleware layers within the Optimizely's responsibility, needed to run the application.	I	I	R, A	
Platform hosting specific: Provide adaptive maintenance for the application and all software and middleware layers within the Suppliers' responsibility, needed to run the application.	I	I	R, A	
• **Service Review**	Designee	Customer	Optimizely	Additional information / Notes
Service follow-up meetings	R, A	I	-	
Application Maintenance service SLA reporting	R, A	I	-	Report details to be agreed: Provide monthly service-level performance reports against each Service Level Agreement, including trends for each and summary view (see also support services) & Provide mutually agreed to report that capture service requests demands and measure of ability to satisfy demand
Platform hosting service SLA reporting	I	I	R, A	Optimizely provides monthly platform performance reports to detail the services is performing against the SLA.
Application maintenance specific Support organization (support chains, escalation chains), rules, procedures and tools	R, A	I	I	

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Platform hosting specific: Support organization (support chains, escalation chains), rules, procedures and tools	I	I	R, A	
Application maintenance specific Formalize and keep up-to-date the documents describing the support organization, procedures and tools	R, A	I	I	
Platform hosting specific: Formalize and keep up-to-date the documents describing the support organization, procedures and tools	I	I	R, A	

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