

Short onboarding descriptions for Software Subscription Agreements (SSAs)

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CMS/Commerce (Paas, SaaS) Onboarding Packages – Up to 20hr (XS), 60hr (S), 80hr (M) and 130hr (L)

The scope of activities includes:

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Program management from kickoff to first go-live deployment.
- Regular status calls throughout the onboarding engagement.
- Enhanced program management with more frequent status calls for M and L packages.
- Best practice guidance and strategy sessions.
- Dedicated contact for all onboarding-related issues.
- Single point of escalation for related issues.
- Detailed tasks and project plan for stakeholder alignment.
- Establishing, executing, and signing off on a launch checklist.
- Managing relationships between the Customer, Optimizely managed services, and the development partner.
- SSL certificate verification.
- Extended support for 2 weeks post-go-live.

SaaS CMS – Up to 45hr (S), 70hr (M) and 130hr (L)

The scope of activities includes:

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Program management from kickoff until first application deployment, with regular status calls during the onboarding engagement.
- Best practice guidance and workshops including:
 - Content modelling Strategic Workshop(s)
 - Content modelling Technical Workshop(s)
 - GraphQL Technical Workshop
- A single-point-of-contact and a single-point-of escalation for related issues as part of the onboarding engagement
- Detailed tasks and project plan to ensure alignment between all stakeholder parties
- Relationship management between the Customer and development partner
- End User Training
 - Q&A Sessions (website traffic vs usage, uptime, & metrics)
- Go-live checklist session to ensure smooth launch and coordination
- Up to 2 weeks of go-live support

Product Recommendations Onboarding package – Up to 65hr

The scope of activities includes:

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Program management from kickoff until live, with regular status calls during the onboarding engagement.
- A single-point-of-contact and a single-point-of-escalation for related issues as part of the onboarding engagement
- Best practice assistance includes the setup and configuration of bespoke strategy to Product Recommendations widgets, based on client requirements and KPI objectives
- Deployment & Go-Live following the implementation and functional testing of recommendations on a test site
 - 6 x Perform widgets
 - 1 x Perform channel
- Admin and business user enablement session of portal
- Platform training
- Strategy workshop
- Weekly Performance report
- Establish, execute, and sign off custom deliverables
- 2-4 weeks of live support

Content Intelligence and Content Recommendations / Email Content Recommendations Onboarding Package – Up to 55hr

The scope of activities includes:

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Program management from kickoff until first go-live deployment, with regular status calls during the onboarding engagement.
- A single-point-of-contact and a single-point-of escalation for related issues as part of the onboarding engagement
- Admin and business user training of platform
- Best practice assistance includes the setup and configuration of bespoke strategy to widgets based on client requirements and KPI objectives
- Assisting to create Three sections + Flows based on customer use cases
- Deployment & Go-Live following the implementation and functional testing of recommendations on a test site
 - 1 x Recommendations Channel (Web is the default)
 - 1 x Intelligence tracking and content ingestion on website channel
- Establish, execute, and sign off on a launch checklist
- Up to 2 weeks of go-live support

Optimizely Data Platform Onboarding Package – Up to 60hr

The scope of activities includes:

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Program management from kickoff until project completion, with regular status calls during the onboarding engagement.
- A single-point-of-contact and a single-point-of escalation for related issues as part of the onboarding engagement
- Detailed tasks and project plan to ensure alignment between the Parties
- The setup and configuration of Optimizely connectors for core products CMS, Commerce, or custom integration of eCommerce data if not using out-of-the-box commerce connector
- Admin and business user enablement of portal
- Main events and tracking configuration for data into ODP
- Reporting and segmentation enablement
- Assist with creating three Real time Segments based on Customer use cases
- Assist the Customer to create up to five standard reports.
- Establish, execute, and sign off on project closure

B2B Commerce Onboarding Package – Up to 20hr (XS), 60hr (S), 80hr (M) and 130hr (L)

The scope of activities includes:

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Program management from kickoff until first go-live deployment, with regular status calls during the onboarding engagement.
- A single-point-of-contact and a single-point-of escalation for related issues as part of the onboarding engagement
- Detailed tasks and project plan to ensure alignment between the Parties
- Architecture Review to ensure we fully understand what you expect from the platform once the implementation has been completed, continuous contact with your partner to ensure all steps are being taken for a smooth setup of your new platform
- Best practice guidance
- Establish, execute, and sign off on a launch checklist
- Up to 2 weeks of go-live support

B2B Analytics Onboarding Package – Up to 20hr

The scope of activities includes:

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Program management from kickoff until first go-live deployment (product onboarding) with regular status calls during the onboarding engagement.
- A single-point-of-contact and a single-point-of escalation for related issues as part of the onboarding engagement
- Detailed tasks and project plan to ensure alignment between the Parties
- Establish, execute, and sign off on a launch checklist
- Up to 2 weeks of go-live support

B2B PIM Onboarding Package – Up to 20hr

The scope of activities includes:

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Program management from kickoff until first go-live deployment (product onboarding) with regular status calls during the onboarding engagement.
- A single-point-of-contact and a single-point-of escalation for related issues as part of the onboarding engagement
- Detailed tasks and project plan to ensure alignment between the Parties
- Product Adoption, Technical and Business oriented consulting for up to 15 hours
- Establish, execute, and sign off on a launch checklist
- Up to 2 weeks of go-live support

B2B Mobile Apps Onboarding Package – Up to 20hr

The scope of activities includes:

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Program management from kickoff until first go-live deployment (product onboarding) with regular status calls during the onboarding engagement.
- A single-point-of-contact and a single-point-of-escalation for related issues as part of the onboarding engagement
- Detailed tasks and project plan to ensure alignment between the Parties
- Pre-go live checklist review & sign-off
- Product Go-Live Support

Experimentation - Web Experimentation Onboarding Packages – Up to 50hr (S), 90hr (M), 125hr (L)

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Kickoff & Business Review - Optimizely will start and end your engagement with a review of your goals, how we get there, and recommendations
- Project Planning & Coordination - Optimizely will actively project plan against your team's needs and work through that plan on a weekly call
- Web Platform – Optimizely will deliver end user outline of how to use the Optimizely Web platform
- Goal Tree Mapping & Hypothesis Creation - Optimizely will deliver a goal tree map of metrics for experiments and a set of 10+ hypotheses to execute against
- Process & Documentation - Optimizely will provide prioritization criteria for your backlog, related test plans, and consult on a proper experimentation process
- Stats Engine & Results Review – Optimizely will review Stats Engine and deliver a results review for the first 2 experiments
- Strategic Foundations – Optimizely will deliver guidelines for experimentation best practices related to the customer, from goal alignment through results analysis
- Technical Discovery – Optimizely deliver workshop(s) to establish an implementation design document specific to the customer architecture
- Platform Set Up – Optimizely delivery workshop(s) to set up the primary components: Pages, Events, and Audiences that will be used to build experiments
- Integration Support & A/A Test Support - Optimizely will work with you to develop necessary integrations for data in and data out of Optimizely and help setup A/A Test to validate
- Experiment QA – Optimizely will consult on the best ways for you to QA and launch experiments in your architecture
- Experiment Launch – Optimizely will build, QA, and launch your first 2 experiments with your participation

Experimentation – Feature Experimentation Onboarding Packages – Up to 55hr (S), 95hr (M), 125hr (L)

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Kickoff & Business Review - Optimizely will start and end your engagement with a review of your goals, how we get there, and recommendations
- Project Planning & Coordination - Optimizely will actively project plan against your team's needs and work through that plan on a weekly call
- Feature Experimentation Platform – Optimizely will deliver end user outline of how to use the Optimizely Feature Experimentation platform
- Goal Tree Mapping & Hypothesis Creation - Optimizely will deliver a goal tree map of metrics for experiments and a set of 10+ hypotheses to execute against
- Process & Documentation - Optimizely will provide prioritization criteria for your backlog, related test plans, and consult on a proper experimentation process
- Stats Engine & Results Review – Optimizely will review Stats Engine and deliver a results review for the first 2 experiments
- Strategic Foundations – Optimizely will deliver guidelines for experimentation best practices related to the customer, from goal alignment through results analysis
- Governance - Optimizely will provide a RACI outlining how you should manage the experimentation workflow in your organization
- Technical Discovery – Optimizely deliver workshop(s) to establish an implementation design document specific to the customer architecture
- Platform Set Up – Optimizely will help you set up environments, events, audiences, and first flags in your account/provide enablement on UI & SDK methods
- Integration Support & A/A Test Support - Optimizely will work with you to develop necessary integrations for data in and data out of Optimizely and help setup A/A Test to validate
- Experiment QA – Optimizely will consult on the best ways for you to QA and launch experiments in your architecture
- Enriched Event Export - Optimizely will work with your team to find the ideal connection with Enriched Events Export and provide enablement on how data is stored and formatted

Experimentation – Full Platform Onboarding Packages – Up to 75hr (S), 110hr (M), 150hr (L)

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Kickoff & Business Review - Optimizely will start and end your engagement with a review of your goals, how we get there, and recommendations
- Project Planning & Coordination - Optimizely will actively project plan against your team's needs and work through that plan on a weekly call
- Feature Experimentation Platform – Optimizely will deliver end user outline of how to use the Optimizely Feature Experimentation platform
- Goal Tree Mapping & Hypothesis Creation - Optimizely will deliver a goal tree map of metrics for experiments and a set of 10+ hypotheses to execute against
- Process & Documentation - Optimizely will provide prioritization criteria for your backlog, related test plans, and consult on a proper experimentation process
- Stats Engine & Results Review – Optimizely will review Stats Engine and deliver a results review for the first 2 experiments
- Strategic Foundations – Optimizely will deliver guidelines for experimentation best practices related to the customer, from goal alignment through results analysis
- Multi-Armed Bandit Strategy – Optimizely will consult on use cases for the customer to gain value with Optimizely's Multi-Armed Bandit features and provide 5+ campaign hypotheses
- Feature Management Strategy – Optimizely will consult on best practices and governance for managing multiple feature flags
- Governance - Optimizely will provide a RACI outlining how you should manage the experimentation workflow in your organization
- Technical Discovery – Optimizely deliver workshop(s) to establish an implementation design document specific to the customer architecture
- Platform Set Up – Optimizely will help you set up environments, events, audiences, and first flags in your account/provide enablement on UI & SDK methods
- Integration Support & A/A Test Support - Optimizely will work with you to develop necessary integrations for data in and data out of Optimizely and help setup A/A Test to validate
- Experiment QA – Optimizely will consult on the best ways for you to QA and launch experiments in your architecture
- Enriched Event Export - Optimizely will work with your team to find the ideal connection with Enriched Events Export and provide enablement on how data is stored and formatted

Personalization Onboarding Packages – Up to 25hr (S), 40hr (M)

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Kickoff & Business Review - Optimizely will start and end your engagement with a review of your goals, how we get there, and recommendations
- Project Planning & Coordination - Optimizely will actively project plan against your team's needs and work through that plan on a weekly call
- Platform – Walk through of the platform UI to give users an overview of how to build out their campaigns
- Personalization Strategy - Optimizely will provide education and hypotheses specifically for gaining value on personalization and behavioral targeting
- Stats Engine & Results Review – Optimizely will review Stats Engine and deliver a results review for the first two campaigns
- Technical Discovery – Optimizely deliver workshop(s) to establish an implementation design document specific to the customer architecture
- Platform Set Up – Optimizely delivery workshop(s) to set up the primary components: Pages, Events, and Audiences that will be used to build experiments
- Integration Support & A/A Test Support - Optimizely will work with you to develop necessary integrations for data in and data out of Optimizely and help setup A/A Test to validate
- Campaign QA – Optimizely will consult on the best ways for you to QA and launch campaigns in your architecture
- Campaign Launch – Optimizely will build, QA, and launch your first two capmaigns with your participation

Optimizely Analytics Onboarding - Up to 40hr (S), 80hr (M), 100hr (L)

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including, but not limited, to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Discovery
- Onboarding project sync
- Workshops
- Implementation and configuration support
- Three to ten metrics defined and created
- Up to three dashboards completed
- End user training: Optimizely will provide up to two sets of persona-based training sessions – technical stakeholder and end-user training

Content Marketing Platform Onboarding Packages – Up to 60hr (S), 105hr (M), 140hr (L)

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including, but not limited to, [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Kick-off and executive alignment meetings
- Discovery phase: The discovery phase is an essential foundational assessment to capture current state and pain points. Optimizely will identify the existing integrated marketing processes, taxonomy and requirements required for deployment.
- Custom project plan creation
- Design Phase: In this phase, Optimizely and Customer will collaborate to design and document optimized business processes including integrated marketing campaign planning processes, content workflows, and universal taxonomy.
- Deployment Phase: In the deployment phase, Optimizely will collaborate with Customer to set up and configure the software in accordance with the agreed upon deployment plan. This is broken out into three phases:
 - UAT testing: The UAT phase provides validation with the core team and select critical end users (defined as all members of Customer’s team who will utilize CMP) to ensure the deployment plan has been successfully executed
 - End User Training:
 - Admin training for system administrators and product owners
 - Persona-based end-user training
 - Close out:
 - Office hours post go-live
 - Handover to Customer Success

DAM Onboarding Package – Up to 65hr

- Online training program:
 - Unlimited access to [Optimizely Academy](#)—including, but not limited to, [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Includes admin and end-user training on the Library Module (DAM)
- Workshops of best practices including recommendations on how best to leverage storage, search, history, sharing and collections.
- Configuration of library taxonomy, folder structure and governance.
- Includes a migration of assets (up to 1TB) from a previous system.

Opal Onboarding Package – Up to 20hr (S)

The scope of activities includes:

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to key concept videos and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Core context setting and instructions setup

- Training on OOTB agents and features
- Best practices for prompt engineering
- Documentation and education delivered for long term success
- Admin training
- All end users trained

Opal Onboarding Package – Up to 40hr (M)

The scope of activities includes:

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to key concept videos and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Core context setting and instructions setup
- Training on OOTB agents and features
- Best practices for prompt engineering
- Documentation and education delivered for long term success
- Admin training
- All end users trained
- Use case specific agent deployment

Opal Onboarding Package – Up to 80hr (L)

The scope of activities includes:

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to key concept videos and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Core context setting and instructions setup
- Training on OOTB agents and features
- Best practices for prompt engineering
- Documentation and education delivered for long term success
- Admin training
- All end users trained
- Use case specific agent deployment
- Use case specific autonomous agent deployment

Campaign Onboarding Package – Up to 60hr

The scope of activities includes:

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- Program management from kickoff until first send out, with regular status calls during the onboarding engagement.
- A single-point-of-contact and a single-point-of-escalation for related issues as part of the onboarding engagement
- Initial setup and configuration of Campaign Clients according to best practices
 - Initial subscriber list check, including quality testing of recipient addresses to ensure quality performance/first class mailing reputation
 - Creation of initial users and assignment of appropriate rights/permissions
 - Setup of the initial recipient lists, with field structure matching the customer scenarios
 - Depending on your scenario setup of the needed configuration, including jobs, user rights, and API Users, we will cover the goals of your scenario. Including one adoption of the initial design.
- Best practice guidance
- Platform Demo session
- Strategy Sessions
- Connecting Campaign with other Optimizely solutions
- Establish, execute, and sign off on a launch checklist

- Up to 2 weeks of go-live support

Delivera Onboarding Package – Up to 10hr

- Online training program
 - Unlimited access to [Optimizely Academy](#)—including but not limited to [key concept videos](#) and [e-learning](#)
 - Additional access to [public events](#) and [live session recordings](#)
- A single-point-of-contact and a single-point-of-escalation for related issues as part of the onboarding engagement