

# Optimizely Data Platform - Service Description

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## 1. ODP Subscription Description

The Optimizely Data Platform or ODP enables the users to harmonize their data from any system or tool via integrations or APIs to build a 360-degree view of their customer. Users can view profile, identifiers, consent/reachability and event data in the service, collected across all channels, systems and tools including but not limited to: online, mobile, and email. The data can be enriched by data from other channels such as in-store and call center.

ODP enables a user to understand their customer data through insights, observations and predictions generated via Artificial Intelligence (AI) and Machine Learning (ML). Users can get additional understanding via product catalog insights, observations, and predictions.

ODP enables the additional ability to create custom reports. A user can act on their data by building sophisticated filters and segments to target across the Optimizely platform or via integrations to channels such as Google and Facebook for advertising.

### 1.1 Tracking

ODP allows for tracking of your events either via a web SDK (JavaScript tag), mobile SDKs (React Native) or via REST APIs. By default the service tracks a standard set of events such as pageviews, orders, cart and browse abandonment but also supports the ability to track any custom event as well.

### 1.2 Historical Data

Users can ingest historical data such as orders, products, content and customer data through integrations, REST APIs, or CSV upload.

### 1.3 Querying

The event data in the service can be queried via either REST APIs, which follows the Microsoft REST API Guidelines or via GraphQL. For more information see the API documentation.

## 1.4 Profiles

When events are being tracked into the service, it triggers identity resolution for each event to aggregate data onto profiles that may be queried via REST API, which follows the Microsoft REST API Guidelines or GraphQL. See more information on the Customer REST API Documentation.

## 1.5 Customer identity and resolution

Identity resolution is the process of identifying all the different events on a particular customer's journey and stitching them together to form a complete, unified record of that journey. These events, such as email clicks, webpage views, products added to cart, orders placed, support tickets submitted, etc., can be captured across channels and devices.

The service uses many identifiers to stitch customers together, including email address, browser cookie, and even custom identifiers like a help desk ID, account number, shopping cart ID, and more.

## 1.6 Viewing customer data

Customer data can be viewed for each aggregated profile in the user interface. Users can view aggregated customer profile data to understand changes to your customer base. From the size of your reachable audience to identifying information on an individual level. Individual profiles will show all the resolved identifiers, events, and both standard and custom attributes. For more information on customer profiles, see the Profile Guide.

## 1.7 Segments

A user can act on their data by building sophisticated segments within ODP. A segment is a subset of your customers based on who they are and what they've done. There are two principles to understand that will enable you to build a segment.

1. Customers: A customer can have or not have specific attributes, insights, and observations denoting who they are or aren't. Examples of these include email, order likelihood, and acquisition source.
2. What a customer has done: A customer can have or not have different engagements with your business. Examples of these behaviors include orders, email opens, and website visits.

Standard segments can also use behaviors and filters within ODP. You can use these segments for analysis in reporting or targeting in marketing campaigns. For more information on how to create and use Standard segments, see the Standard Segment Creation and Management Guide.

Real-Time Segments can be created in ODP and shared across select Optimizely Products. For more information on how to create and use Real-Time Segments, see the [Real-Time Segment Creation and Management Guide](#).

## 1.8 CDP Audience Sync

CDP Audience Sync enables users to sync audiences built in their own CDP to Optimizely for targeting with Web Experimentation, Feature Experimentation, and CMS, via Optimizely Real-Time Segmentation. Real-time segmentation allows for Optimizely Data Platform (ODP) and CDP Audience Sync customers to segment their users in real time and further personalize their users' web-based experience. Customers may purchase the CDP Audience Sync version of ODP exclusively for enabling Real-Time Segments in other Optimizely products, and Optimizely will provide a limited ODP instance configured to work with the Customer's existing CDP. Customers will have limited-to-no access to the ODP User Interface (UI) or other functionality, other than essential views determined by the Optimizely Onboarding team to ensure that Real-Time Segment can be used successfully in conjunction with the additional Optimizely products.

## 1.9 ODP Predictions

ODP analyzes the data connected and tracked to calculate predictions.

The "**Predicted Time Until Next Order**" report is a combination of two different modeled attributes — "Order Likelihood" and "Days Until Next Order." The models look at the last 180 days to predict the next 42 days (6 weeks). Each model is custom built to the data source, retrained monthly, and new predictions run nightly.

A customer's likelihood to still be your customer is based on their patterns of engagement with your brand. By identifying customers who are breaking their normal patterns, you can intervene and save the relationship at the most opportune time. ODP's customer winback model shows the relationship between days since engagement and likelihood to still be your customer, so that you can find fading customers before they churn.

The **product opportunities** report surfaces the relationship between a product's views and its sales as long as the product has been viewed and sold at least twice in the last 30 days. This information provides insight into product performance and can guide how to handle the product's marketing efforts moving forward. Products display at the parent product level where applicable.

## 1.10 ODP Product Recommendations

Personalized product recommendations are a powerful tool for driving sales, improving conversion rates, and increasing order value. In ODP, product recommendations are available via REST APIs or GraphQL. For more information on ODP Product Recommendations, see our [Product Recommendation Guide](#).

## 1.11 Integrations and Connect Platform

ODP supports dozens of integrations via the Connect Platform. Integrations make it very easy to track, import, or export/activate data from ODP. Typically, integrations require only credentials or API keys, and data can then begin to be imported.

To integrate PaaS Commerce with ODP, the client needs to install the Optimizely Service API Nuget package. To learn more about the integration, visit [PaaS Commerce + ODP](#).

## 1.12 Reporting

In the reports tool, you can view the standard reports in your account, along with any custom reports that you create. Custom reports allow you to analyze data from various sources, such as your customer profiles. For more information on creating reports, visit [ODP Reports Guide](#).

Dashboards based on data within ODP are available through the Optimizely Reporting product. To learn more, visit [Optimizely Reporting](#).

# 2. Definitions

## 2.1 Subscription

Means the arrangement by which a Client is granted access to the Optimizely Data Platform (ODP) and the tracking infrastructure required to collect and store the data in ODP.

## 2.2 Usage and Overage Terms

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

# 3. Architecture Overview

More detailed information that describes the architecture of the Optimizely Data Platform, along with an introduction to the system foundation and related components and products, is available in the [Technical Overview Guide](#).

## 3.1 Service Instances

All Subscriptions include one or more instances that are typically used to align with deployment stages as follows.

### 3.1.1 Preproduction stage

A separate instance that can be used for UAT, load testing, or approved penetration testing.

### 3.1.2 Production stage

Once a Client implementation is production-ready and deployed, a separate production instance is used for tracking real events.

### 3.1.3 Developer Guidelines

See the ODP Developer Guide for information about developing, deploying, and working with the Optimizely Data Platform.

## 4. Regional Data Centers

When setting up a service instance for ODP, customers can choose from one of the following locations:

<b>GEOGRAPHY</b>	<b>REGION</b>
North America	<b>East US</b>
Europe	<b>North Europe (Ireland)</b>
Asia-Pacific	<b>Australia</b>

## 5. Service Requirements

Optimizely Data Platform is built on Optimizely and Amazon Web Services technologies. The integration from any Optimizely product to the Optimizely Data Platform can be accomplished via an integration to the Optimizely product listed the app directory in the Optimizely Data Platform. If the integration is not listed, a Client can still integrate with ODP via REST APIs, mobile SDKs or Web SDK.

## 6. Consulting and Training

## 6.1 Expert Services

Optimizely's Expert Services team helps ensure that customers and partners are successful in implementing Optimizely's Insight 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 Insight.

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

## 6.2 Onboarding

Upon ordering Optimizely Data Platform, ODP's onboarding team will ensure that the Customer receives access to Services included in the Subscription.

## 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 or from the self-service website. Learn more about ODP through training.

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

# 7. Support

Please refer to the Optimizely Support Policy for more information.

# 8. 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 Managed Services and Support 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.

## 8.1 Service Level Indicators

Optimizely monitors key areas of the service to ensure availability and react to incidents.

SLI	SLO	Description
HTTP end-point uptime	According to SLA	We connect to the endpoint to download the response. Consecutive failures to this check triggers Incident Management procedures.

## 8.2 Backup copying and loss of data.

Optimizely takes responsibility for making daily backup copies of the production data in the Subscription. Optimizely takes the responsibility for saving these backup copies for thirty (30) days. Thereafter, Optimizely takes no responsibility for the backup copied information.

### 8.2.1 Additional backup

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

### 8.2.2 Responsibility for loss or distortion of data

Over and above the responsibilities that Optimizely has taken on in accordance with section 8.2, Optimizely takes no responsibility for any loss or distortion of information/data.

## 8.3 Backup and Retention Schemes

Customer data is backed up every twenty-four (24) hours with monitoring and verification. Historic backups are archived for 30 days, to ensure availability of the backups in the event of disaster.

## 8.4 Disaster Recovery

Depending on the cause, the maximum time of changes that may be lost is 24 hours. See Backup and Retention Schemes above for further details.

### 8.4.1 Recovery Point Objective (RPO)

RPO is 24 hours.

### 8.4.2 Recovery Time Objective (RTO)

Please refer to the Optimizely Services SLA for target objectives.

## 8.5 Monitoring

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

## 8.6 Service Level Agreement

See Optimizely Service Level Agreement (SLA).

## 8.7 Roles and Responsibilities

See the Roles and Responsibilities Matrix for more information.

# 9. Compliance

For information about compliance see the Optimizely Trust Center. Optimizely Data Platform follows Amazon 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 in the Optimizely Data Platform.

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 contact your salesperson or Customer Success Manager if this is of interest.

Customer acknowledges that customer data will be processed in accordance with the Data Processing Agreement (“DPA”).

## 9.2 SOC Compliance

The Optimizely Data Platform (ODP) is currently being audited for SOC2 Type 1 to be completed early in the second half of 2024. The integration of ODP into our full SOC2 Type 2 Compliance Program is planned for Q1 2025. These reports will be available upon request.

# 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. Contact your Optimizely sales representative or the local office to order.

### 10.1.1 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.

## 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-data-platform-service-description/>.

# Appendix 1 - Changelog Summary

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 31, 2023**

ODP-Lite service description information moved to:

<http://world.optimizely.com/services/descriptions/optimizely-data-platform-service-description/>

### **Changes for distribution Sep 28, 2022**

Update legal links and added regions