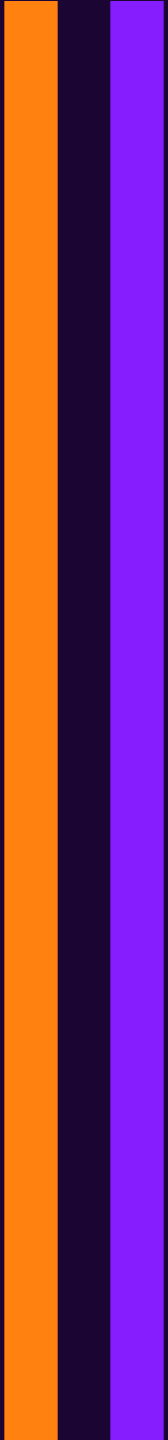


OMVP Summit: Commerce and Personalization



**Tina
Nelson**



Product Strategy Director

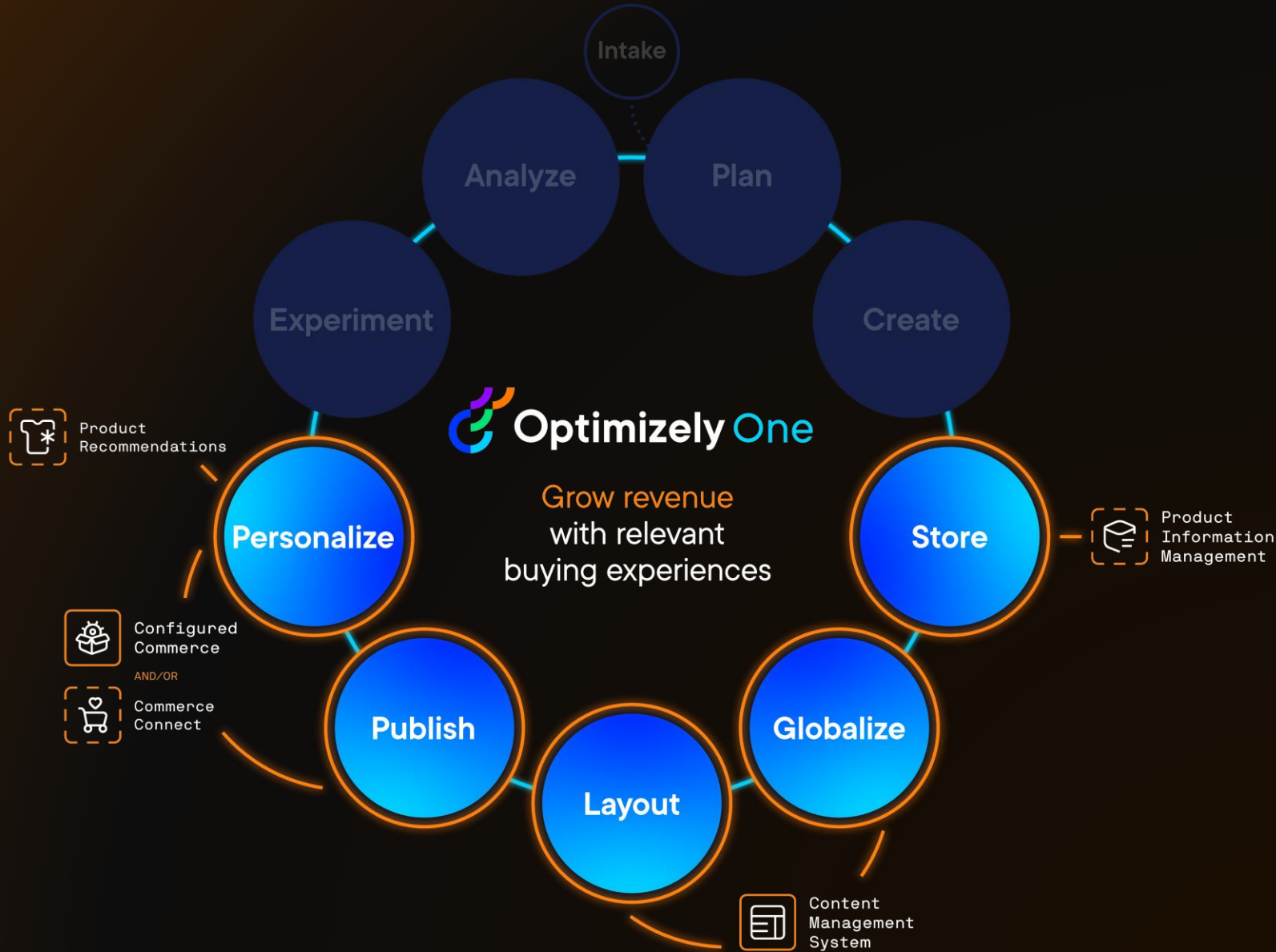
01

Commerce

Compose your commerce stack and deliver high-impact buying experiences

SOLUTION

Experience-led commerce



What is the Optimizely One commerce message?

Experience-led Commerce

Optimizely One

for transformation-ready organizations

Configured
Comm.

OR

CMS

Commerce
Connect

PLUS ANY OF THE FOLLOWING

Data (ODP)

Experimentation (WX/FX)

Collaboration (CMP)

Unique Selling Points

Commerce Connect

- Content and commerce in a single screen (*STILL* a differentiator)
- Strong campaign and promotion capabilities
- Very tight integration with other Opti products (CMS, CMP, Product Recs, Search, etc.) and maximum extensibility
- Batteries Plus, New Era, NAKD, Dot Foods, Benefit Cosmetics, and more!

Both

- Can be deployed in a variety of ways TODAY (coupled, decoupled, headless, etc.)
- Strong APIs make integration with other systems easy
- The larger Opti ecosystem is a huge selling point (when competing with standalone platforms)

Configured Commerce

- Built for B2B – more out of the box
- Strong integrations/partnerships with common ERP and PIM solutions
- Integration with other Opti products is being worked on
- Royal Canin, Guest Supply, Toro, Polaris, Mayer Electric, and more!

Experience-led Commerce

Deliver modern, relevant commerce experiences your customers will love and maximize revenue growth

Commerce Composable Modules

Payments

Promotions

Search

DAM

CSR Portal

Stored Value

Segmentation

Catalog manager

AND

Configured

OR

Customized

WITH

Optimizely Product Recommendations

Product Information Management

Analytics

Search & Navigation

Mobile

Content Recommendations

**Additional Energy on
Commerce Connect**



Configured Commerce

Cart/Checkout
Punchout
Order data
User data
Organization data
Purchasing workflows
Pricing
Content
Multi-site/multi-brand
VMI

Commerce Connect

Cart/Checkout Order data
Order data
User data
Memberships
Pricing
*Content
Multi-site/multi-brand
Addl. Order Mgmt./POS

Customizable Views

Released

- Reimagined design of Filter Views from Commerce Manager (v13)
- Possible to filter and then save views for later.
- Administrators can create shared views for their teams.

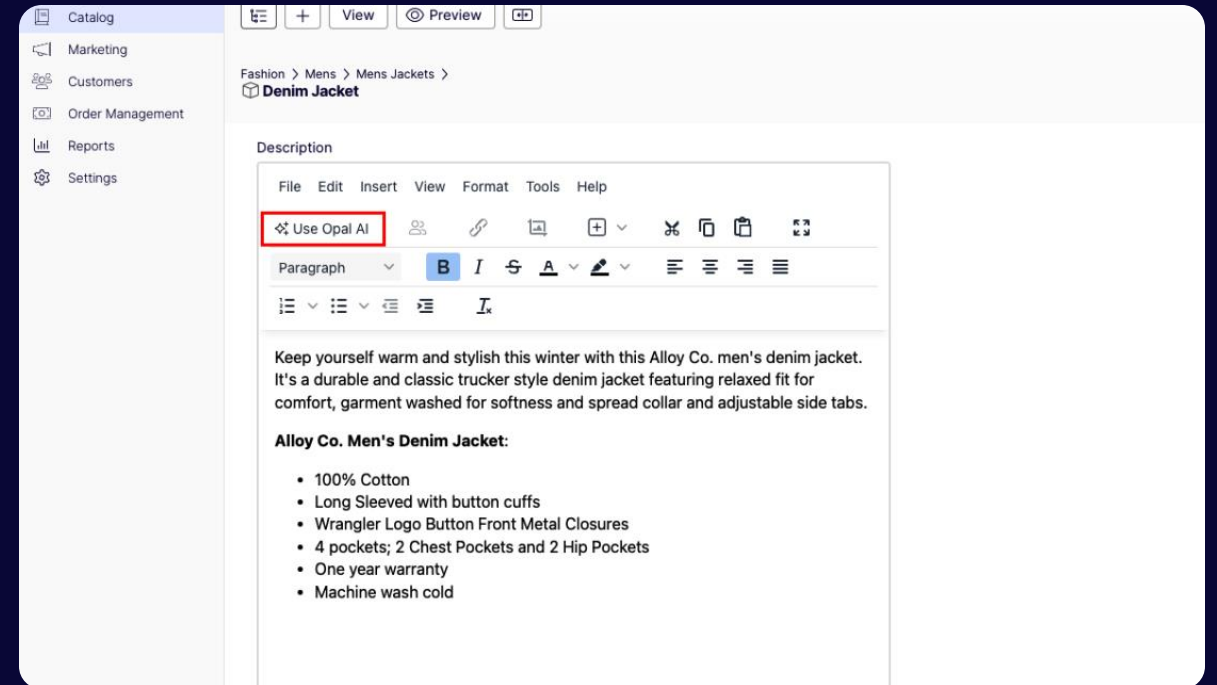
The screenshot shows the Commerce Manager interface. The top navigation bar includes 'Account Name' and 'Commerce'. The left sidebar contains a navigation menu with items: Dashboard, Sales, Catalog, Customers (highlighted), Marketing, Library, Websites, Shipping & Fulfillment, Mobile App, and Administration. The main content area is titled 'Contacts' and has a sub-tab 'Contacts'. A dropdown menu is open, showing 'My Saved View' selected. Below it, there is a search bar and a list of filter views: 'Default', 'Churn Risk low engagement', 'VIPs Strategic customers', 'My Saved Views', 'US Contacts', 'EMEA Orgs', 'Churn Risk low engagement', 'Tom's List Filtered by Type, Creator, Date, Status', 'Public Saved Views', 'VIPs Strategic customers', and 'Public view A'. The main table displays contact information with columns: Name, State, Last Purchase, and Creation Date. A 'Create Customer' button is visible in the top right corner.

Name	State	Last Purchase	Creation Date
Isabella Davis	Minnesota	6/21/23	4/7/22
James Rodriguez	Washington	10/3/23	1/30/22
Isabella Davis	Tennessee	10/9/23	2/12/22
James Rodriguez	Oregon	10/12/23	2/28/22
Isabella Davis	Indiana	9/10/23	5/30/22
James Rodriguez	Maryland	9/16/23	6/2/22
Isabella Davis	Wisconsin	8/20/23	4/18/22
James Rodriguez	New York	8/12/23	12/5/21
Isabella Davis	Massachusetts	8/2/23	11/15/21
James Rodriguez	Georgia	8/29/23	4/27/22
Isabella Davis	Colorado	9/25/23	3/22/22
James Rodriguez	Ohio	9/30/23	5/25/22
Isabella Davis	Michigan	7/18/23	12/11/21

Gen AI Product Desc. Generator

Released

- Write product descriptions utilizing Optimizely's Opal AI
- Re-write content on the fly, improving SEO visibility, content freshness and reducing manual workload.
- Request access via PaaS Portal

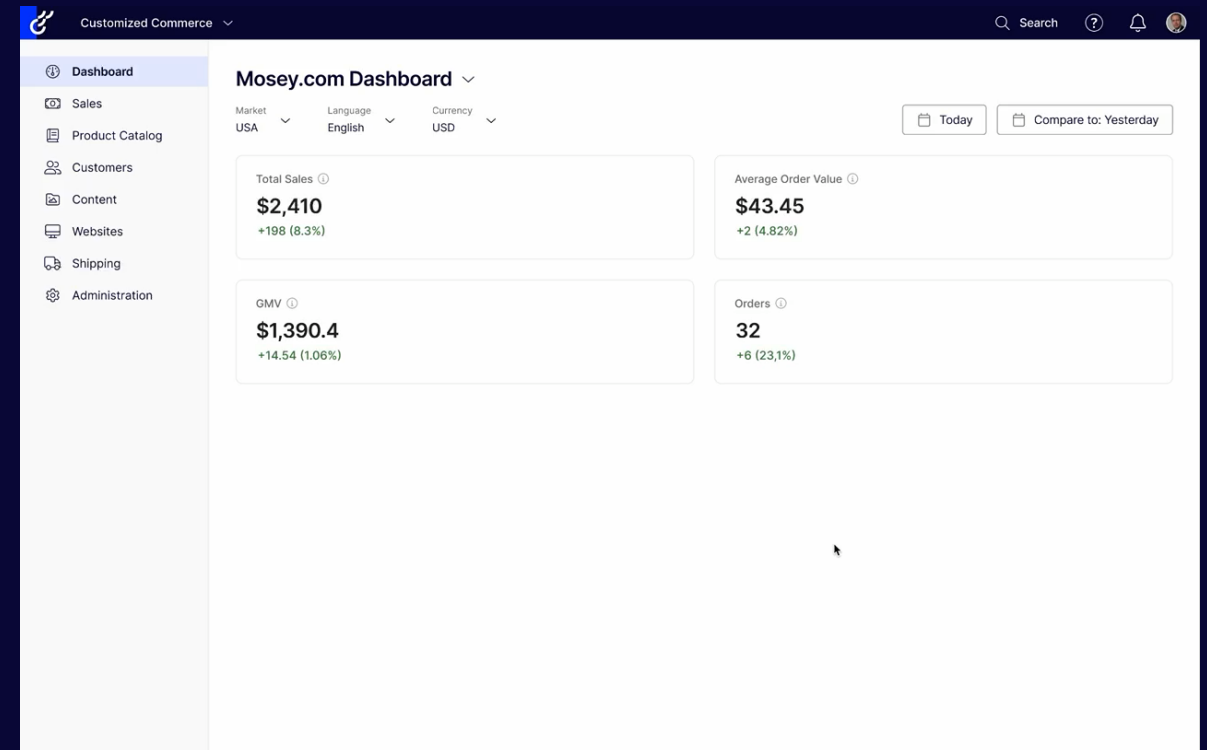


Analytics (Sales, AOV, Orders)

Released

TODAY!

- Commerce performance reporting from a single interface
- See number of orders placed, average order value, GMV and more to come
- Compare and contrast over time
- View multi-site performance with ease

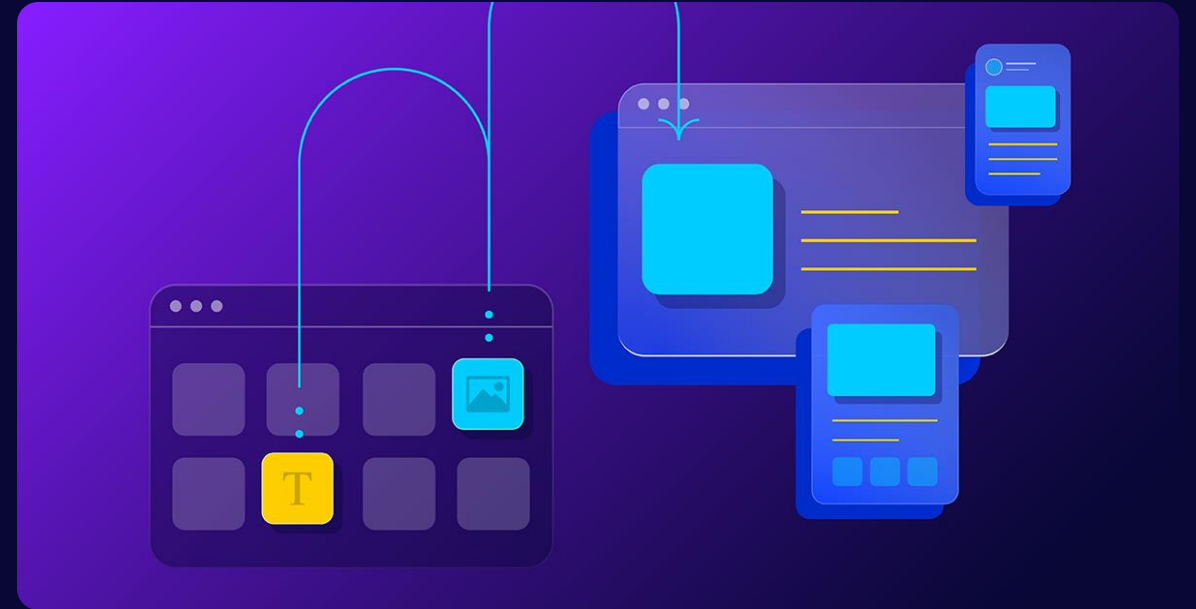


OptiGraph x Commerce Connect

Imminent

SEPT

- Products, variants, categories, list prices and stock are now indexed in OptiGraph!
- Official package releasing later this month
- Tutorial PLP build can be found on Opti World



Payments Service

Imminent

SEPT

- 100+ payment gateways for regional, national, and international payments support
- Two-factor authentication and 3DS support
- Composable module updated independently from Optimizely Commerce to improve maintenance and time-to-market

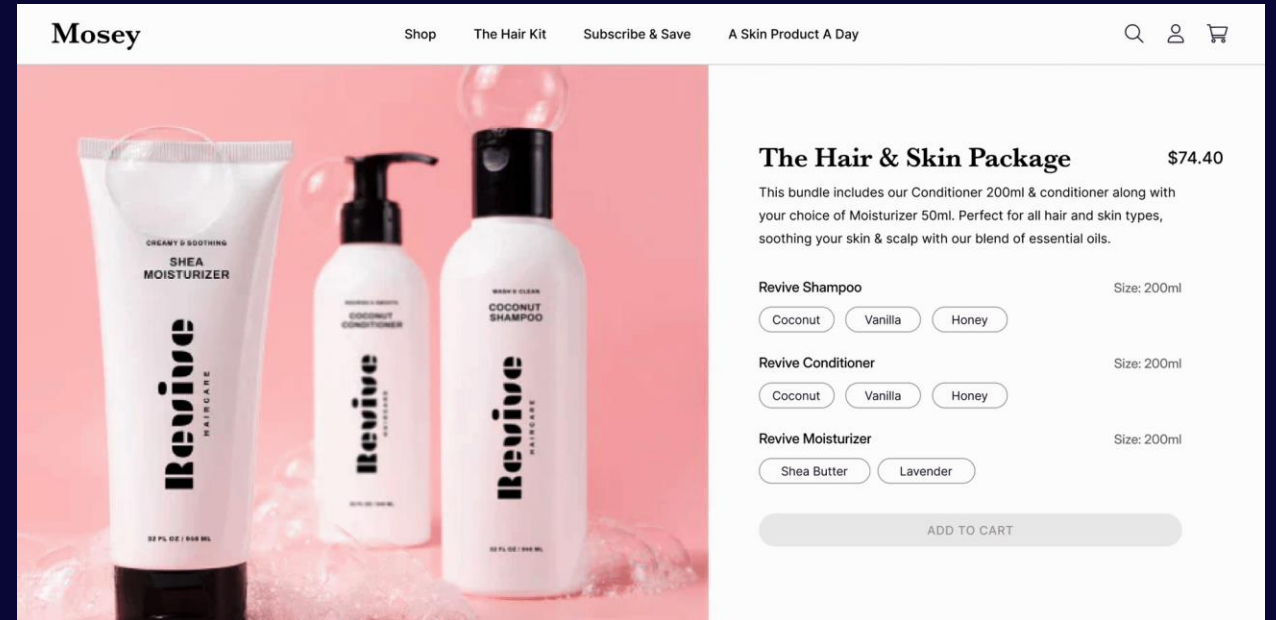


Dynamic Packages

Imminent

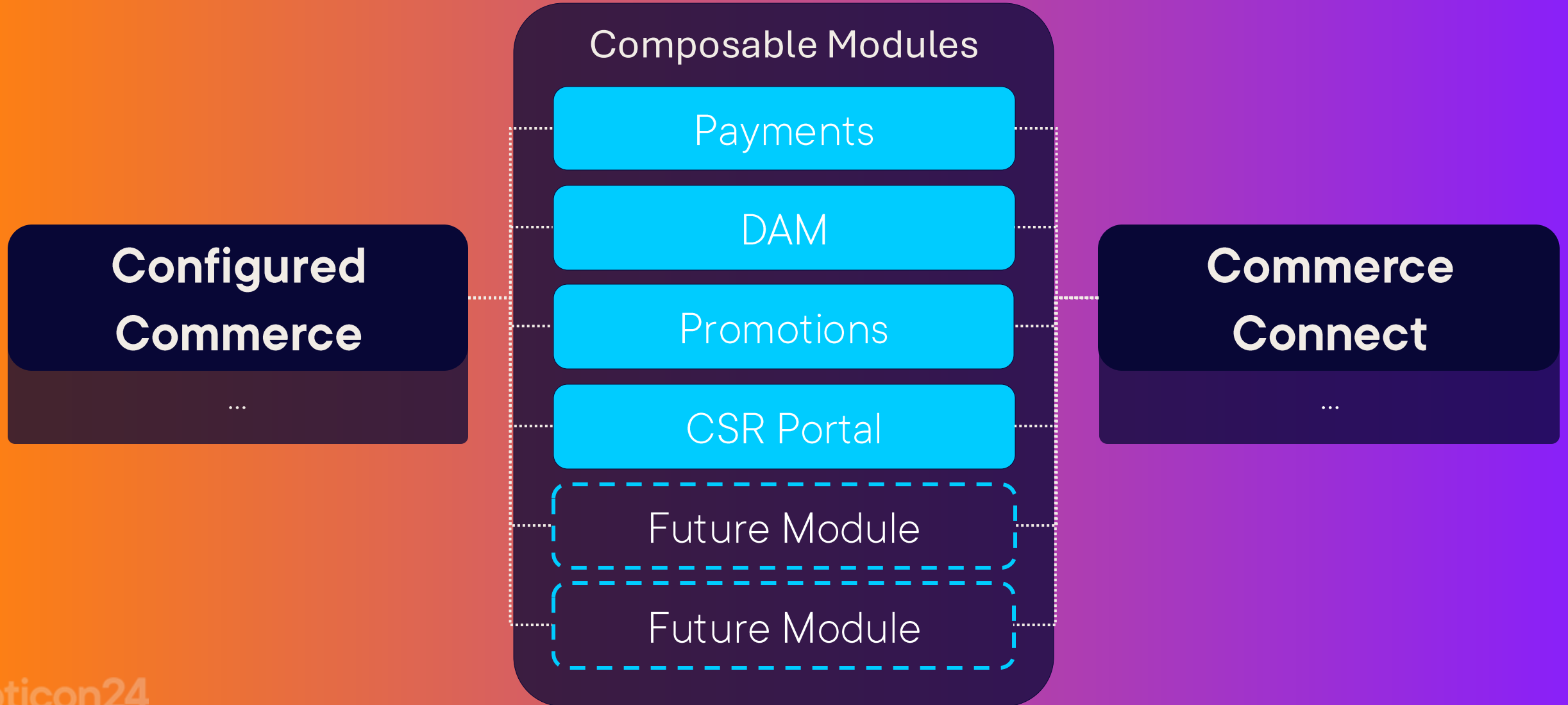
OCT

- Choose variants within packages, increasing flexibility + customer choice
- Reduced need to create multiple packages to allow multiple-choice, reducing admin workload



Composable Modules

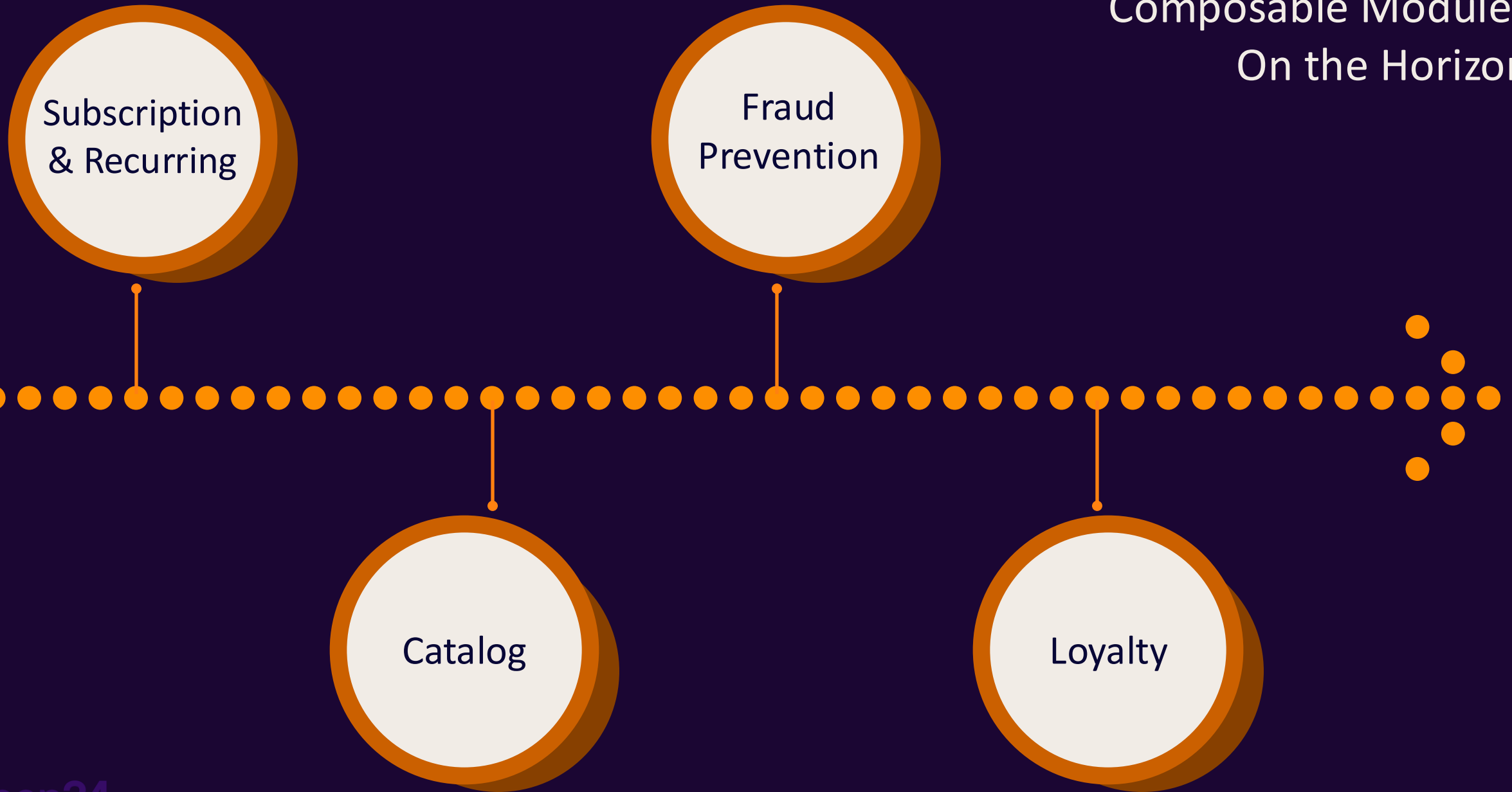
Composable Commerce



Composable Modules Already Underway



Composable Modules On the Horizon



Payments Service

The first Composable Module
for Commerce Connect

01

Benefits of the Payments Module

Time-to-Value

Speed-to-Market

- Rapidly expand to new markets with differing payment requirements
- Add new gateways with a minimal effort
- Save time and money when launching sites or adding payment options

Reduce Total Cost of Ownership

- Reduce partner work for basic payments set up
- Predictable implementation costs
- Spreedly keeps gateway connections up-to-date at no cost
- Switching gateways requires minimal work or investment

Future-Proofing

Complete control of the payment data

- Tokenized card data can follow you to any supported gateway
- Easy to switch between gateways in the future

Take full advantage of **future enhancements** *without* having to version up

02

Use Cases for Payments Module

01

New site or
market launches

02

Changing
payment
providers

03

Leveraging multiple
gateways for higher
success rates

03

See How it Works

The first
**Composable
Module**
for
**Commerce
Connect**

- Leverages Spreedly Payment Orchestration
- Supports 100+ payment gateways and dozens of alternative payment methods
- Supported in over 228 countries
- Free for Commerce Connect cloud customers*

* Up to the subscriptions' transaction limit

Payment service +
Spreedly act as a
middle layer

Card data gets
vaulted in the
service and not on
the payment
gateway

Optimizely handles
the Spreedly
service

Key setup steps

1. A payment service instance is created for the merchant
2. Keys for the instance are added to site applications keys
3. Payment service settings is visible in admin pages
4. A payment service gateway is added
5. Gateway token is copied into the payment settings

03

Demo of Payments Set Up

Payments Service

The first **Composable Module**
for **Commerce Connect**



Roadmap

Commerce Connect – 1 Year Roadmap

Q4 '24

Q1 '25

Later '25

Commerce Engine	Enhanced Analytics Workflows – Add Product	Embedded Experimentation Rapid Variant Builder	Refunds UI improvements Admin UI improvements
Commerce Composable Modules	Promotions (Beta)	Promotions (GA) CSR Portal (GA)	Subscriptions (Beta)
Optimizely One	Translations (Beta)	Translations (GA) Embedded Experimentation	Visual Builder

Roadmap is intended for informational purposes only, is not binding, and should not be relied upon in making any purchasing decisions. We reserve the right to revise this Roadmap at any time without notice

Configured Commerce – 1 Year Roadmap

Q4 '24

Q1 '25

Later '25

Commerce Engine	Personalization Management Admin Console UX	Customer Part Numbers My Document Center Cookie Manager	Granular Permissions Your year in purchases Upcoming Shipments
Commerce Composable Modules	Mission Control (GA) Search (Open Beta) Promotions (Beta)	Search (GA) Promotions (GA)	CSR Portal (GA) Subscriptions (Beta)
Optimizely One	DAM Translations	CMP Widget Embedded Experimentation	Segmentation

Roadmap is intended for informational purposes only, is not binding, and should not be relied upon in making any purchasing decisions. We reserve the right to revise this Roadmap at any time without notice

02

Personalization

Customers expect a personalized experience

91%

Consumers are **more likely to shop** with brands that provide offers and recommendations that are relevant to them.

– Accenture

90%

Consumers are willing to **share personal behavioral data** with companies for a cheaper and easier experience.

– SmarterHQ

83%

Consumers are willing to **share their data** to create a more personalized experience.

– Accenture

**...but most don't
feel they're
getting one.**

29%

of consumers agree
“companies do a good
job understanding me
as a person.”

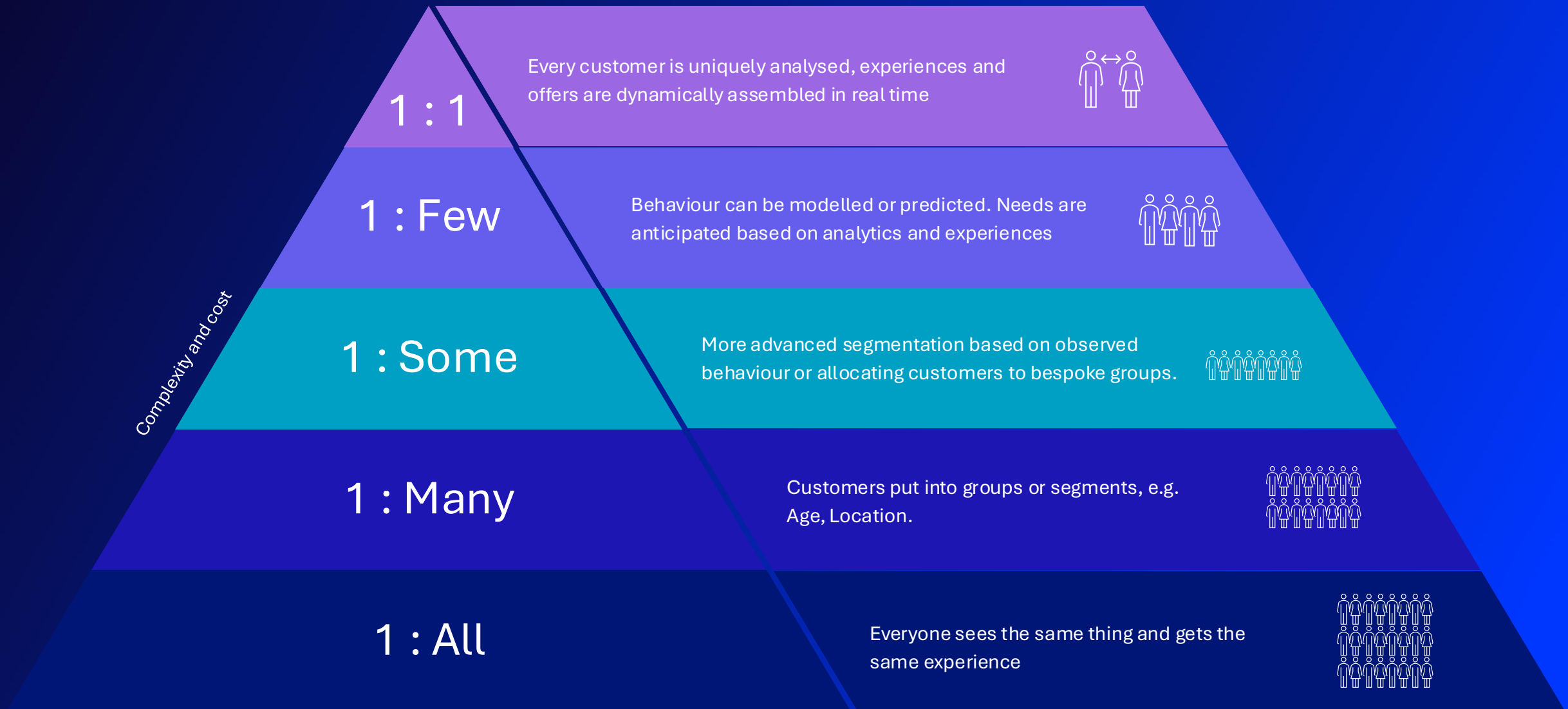
5%

of online adults say
that “emails are
relevant and well
timed to my needs.”

13%

of online adults say
that “brands make me
feel valued.”

The Personalization Pyramid



Building a Personalized Experience

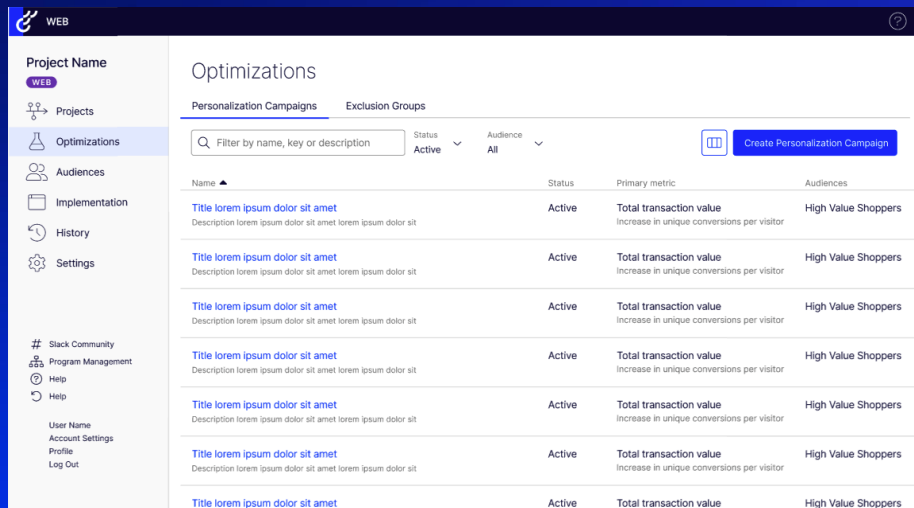




To be announced at
Opticon London

Personalization v Digital Optimization

Personalization (the product)



The screenshot shows the 'Optimizations' section of the Optimizely One interface. It features a sidebar with navigation options like 'Projects', 'Optimizations', 'Audiences', and 'Settings'. The main content area displays a table of 'Personalization Campaigns' with columns for Name, Status, Primary metric, and Audiences. A 'Create Personalization Campaign' button is visible at the top right.

Name	Status	Primary metric	Audiences
Title lorem ipsum dolor sit amet Description lorem ipsum dolor sit amet lorem ipsum dolor sit	Active	Total transaction value Increase in unique conversions per visitor	High Value Shoppers
Title lorem ipsum dolor sit amet Description lorem ipsum dolor sit amet lorem ipsum dolor sit	Active	Total transaction value Increase in unique conversions per visitor	High Value Shoppers
Title lorem ipsum dolor sit amet Description lorem ipsum dolor sit amet lorem ipsum dolor sit	Active	Total transaction value Increase in unique conversions per visitor	High Value Shoppers
Title lorem ipsum dolor sit amet Description lorem ipsum dolor sit amet lorem ipsum dolor sit	Active	Total transaction value Increase in unique conversions per visitor	High Value Shoppers
Title lorem ipsum dolor sit amet Description lorem ipsum dolor sit amet lorem ipsum dolor sit	Active	Total transaction value Increase in unique conversions per visitor	High Value Shoppers
Title lorem ipsum dolor sit amet Description lorem ipsum dolor sit amet lorem ipsum dolor sit	Active	Total transaction value Increase in unique conversions per visitor	High Value Shoppers
Title lorem ipsum dolor sit amet Description lorem ipsum dolor sit amet lorem ipsum dolor sit	Active	Total transaction value Increase in unique conversions per visitor	High Value Shoppers
Title lorem ipsum dolor sit amet Description lorem ipsum dolor sit amet lorem ipsum dolor sit	Active	Total transaction value Increase in unique conversions per visitor	High Value Shoppers

Digital Optimization (the solution)



Optimizely solves personalization as an end-to-end solution

Plan

Collaboration

- Ideation
- Approvals
- Visibility

Create

Create the “who”

- 360-degree profile
- Data integrations
- Segment creation

Create the “what”

- Experience creation
- Low-code templates
- Feature management

Deliver

Decisioning

- Who via real-time segments
- What via targeting, bandits, recs, experiments
- When via triggers
- Where via release vs. owned channels vs. paid channels

Analyze

Results

Impact
ROI
Winner vs. losers

Insights

Journey analytics
Guidance
Data exports
Program reports



Key capabilities of Personalization

Plan

Collaboration

Coming Soon

- Ideation
- Approvals
- Visibility

Create

Create the “who”

- Data integrations
- Segment creation +13 pre-built attributes

Create the “what”

- Experience creation
- Low-code templates
- Experience template

Coming Soon

Deliver

Decisioning

- Who via real-time segments
- When via event triggers
- What via Contextual Bandits

Coming Soon

Delivery

- How via Edge Delivery

Analyze

Results

- Impact
- ROI

Insights

- Learning via Stats Engine
- Data exports
- Program reports

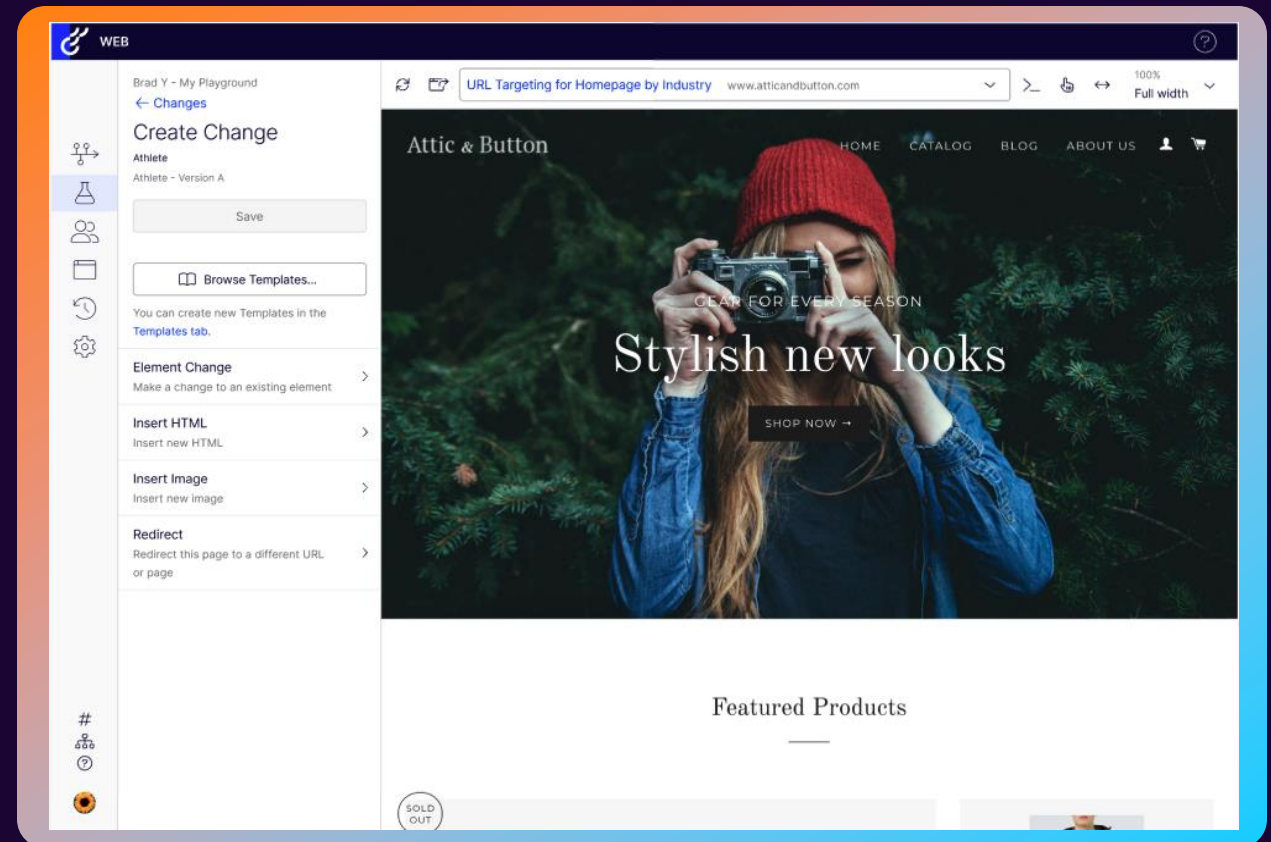
Experience Templates



What's next

Create on-brand web experiences for your personalization campaigns in a few easy steps.

- Use pre-built templates for components like countdown timers, banners, exit intent pop-ups, and more
- Select the template you want to use directly from the experience builder, where you're already working



Contextual Bandits



What's next

Serve the most optimal experience to each individual.

- Reduce guesswork with contextual bandits that harness user-level attributes to make decisions
- Customize bandit algorithms that automatically personalize user experiences to optimize outcomes

The screenshot displays a web experimentation interface for configuring a contextual bandit experiment. The main panel is titled "Experience Name" and includes a text input field containing "Business account promotions". Below this, the "Variations" section allows for setting the "Distribution Mode" to "Manual". A detailed view of the "Manual" mode shows a slider for "Exploit" set at 50%, with a note that "50% get personalized variations." Other options include "Multi-armed Bandit" and "Contextual Multi-armed Bandit". A table on the right side of the interface shows traffic distribution and total traffic for different variations:

Traffic Distribution	Total Traffic	Action
5%	View	
95%	View	...
5%	View	
95%	View	...
5%	View	
95%	View	...

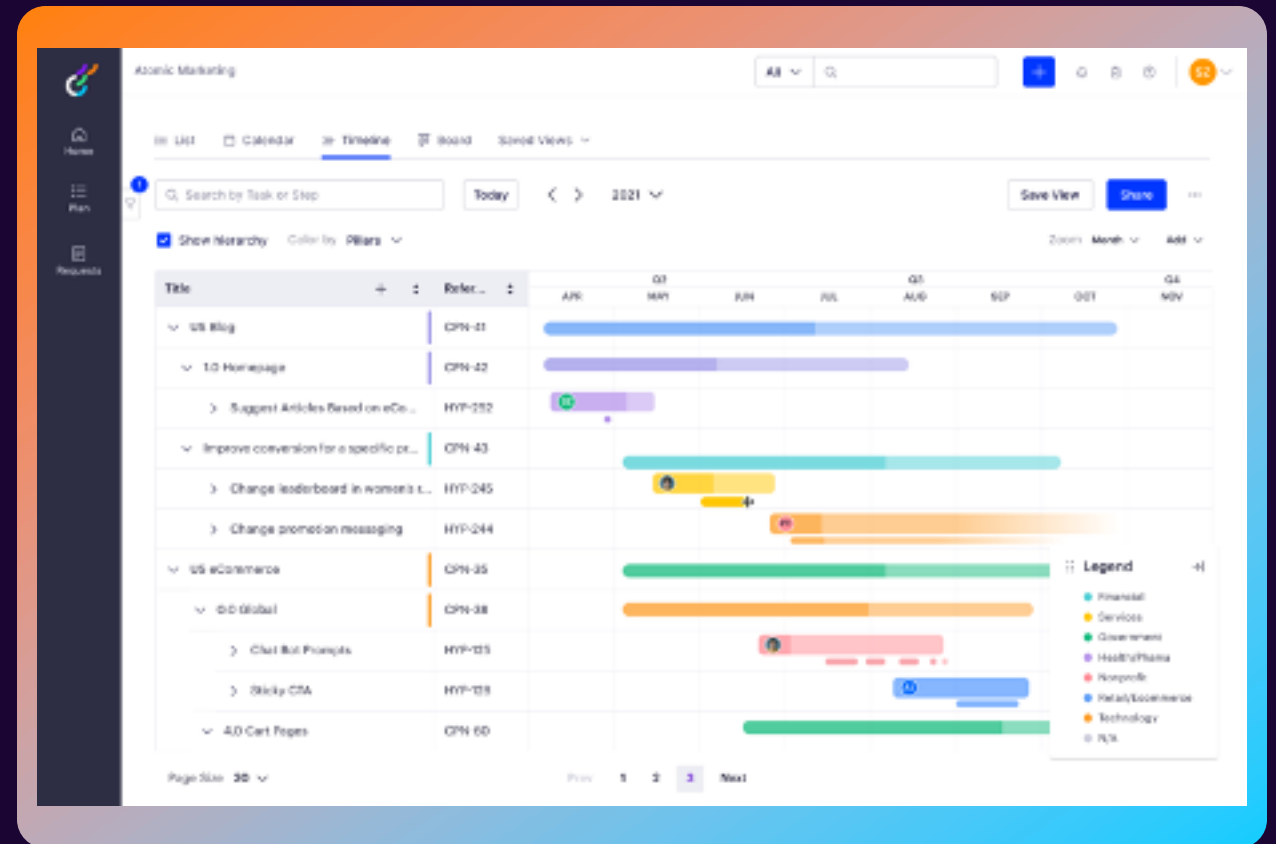
Personalization Collaboration



What's next

Manage and collaborate on your personalization campaigns in one place.

- Track tasks in the design, build, and launch of a campaign
- Orchestrate your personalization program using the calendar, timeline, and view boards
- Customize and save views to share with other stakeholders

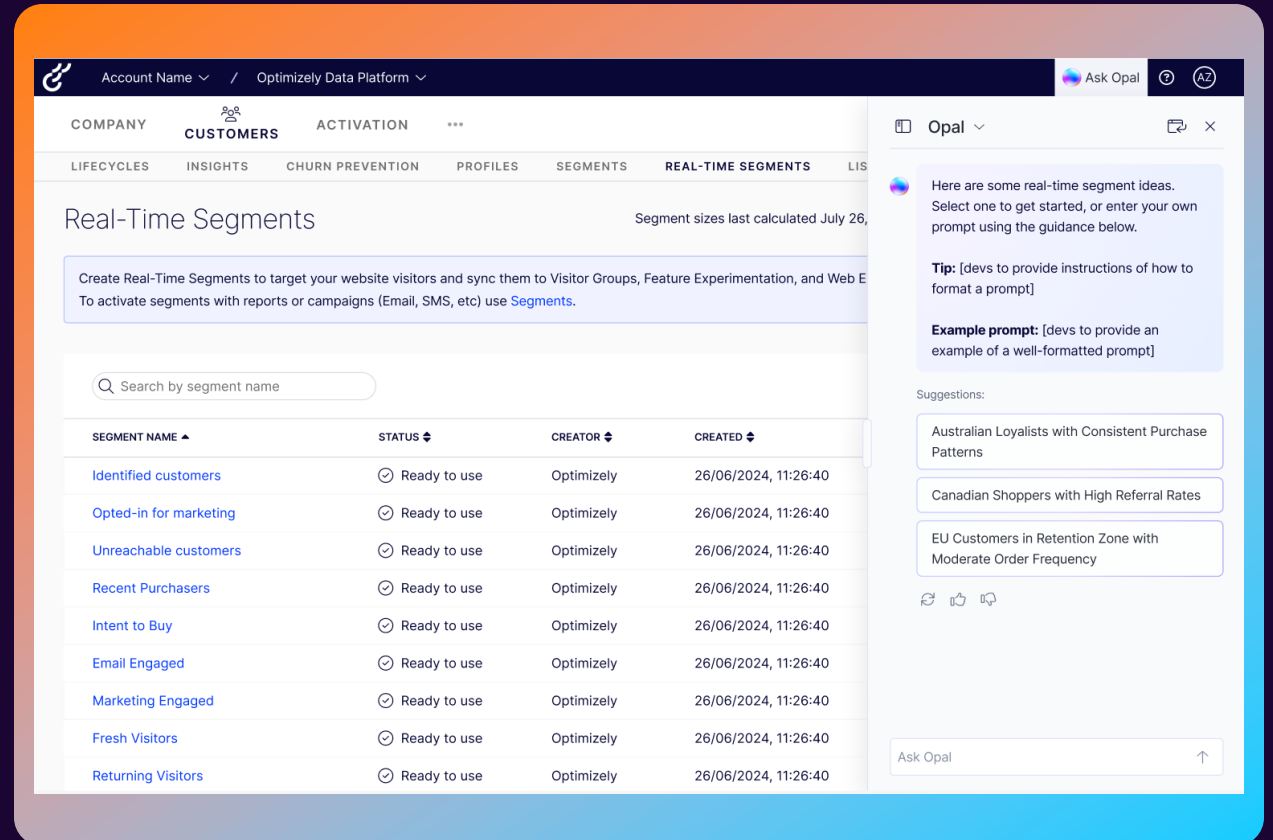


Suggested Segments

What's next

Create audiences based on existing data or user prompts

- Audiences suggested based on existing data that may be valuable like "here is an audience of high spending customers with low engagement"
- Audiences created based on a natural language request like "Give me 2 segments for clients about to churn in US"



The screenshot displays the 'Real-Time Segments' page in the Optimizely Data Platform. The interface includes a navigation bar with 'COMPANY', 'CUSTOMERS', 'ACTIVATION', and 'SEGMENTS'. A sidebar on the right contains an 'Opal' chat window with a prompt: 'Here are some real-time segment ideas. Select one to get started, or enter your own prompt using the guidance below.' Below the chat, a table lists suggested segments:

SEGMENT NAME ▲	STATUS ↓	CREATOR ↓	CREATED ↓
Identified customers	🟢 Ready to use	Optimizely	26/06/2024, 11:26:40
Opted-in for marketing	🟢 Ready to use	Optimizely	26/06/2024, 11:26:40
Unreachable customers	🟢 Ready to use	Optimizely	26/06/2024, 11:26:40
Recent Purchasers	🟢 Ready to use	Optimizely	26/06/2024, 11:26:40
Intent to Buy	🟢 Ready to use	Optimizely	26/06/2024, 11:26:40
Email Engaged	🟢 Ready to use	Optimizely	26/06/2024, 11:26:40
Marketing Engaged	🟢 Ready to use	Optimizely	26/06/2024, 11:26:40
Fresh Visitors	🟢 Ready to use	Optimizely	26/06/2024, 11:26:40
Returning Visitors	🟢 Ready to use	Optimizely	26/06/2024, 11:26:40

The chat window also shows suggestions: 'Australian Loyalists with Consistent Purchase Patterns', 'Canadian Shoppers with High Referral Rates', and 'EU Customers in Retention Zone with Moderate Order Frequency'. An 'Ask Opal' input field is visible at the bottom of the chat.

**We'd love to
hear your
insights!**



Personalization Survey

<https://www.surveymonkey.com/r/OpticonPersonalization>

Thank you!

●pticon

24

