Optimizely x ABU DHABI GLOBAL MARKET سوق أبوظبي العالمي

Content Marketing Platform (CMP)

Onboarding kick-off

Anna Sindalovskaya
25 March 2024

Welcome to **Optimizely Content Marketing Platform.**

And ***start your Content Marketing journey.***

Agenda

1 Optimizely package

2 Program strategy

3 Platform onboarding

4 Risks and escalation path

5 CMP dive-in

6 Next steps

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Optimizely package

Optimizely package

CMP services

CMP license	• Orchestrate • Up to 10 Admins/Creators • Up to 20 Collaborators • Unlimited Guests
CMP instance(s)	• Prod – New (Abu Dhabi Global Market)
Onboarding Services	• Foundation – Up to 80 hours onboarding
Post-onboarding services	• N/A
Technical Integrations	• N/A
Automation and Migration	• N/A

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Program Strategy

Optimizely One

The world's first operating system for marketing

Intake · Plan · Create · Store · Globalize · Layout · Deliver · Personalize · Experiment · Analyze

Under the hood

ADGM Optimizely Stack

Optimizely One
The world's first operating system for marketing and leading digital experience platform

Orchestrate
Transform the way your team plans, creates and publishes content, and accelerate time-to-market.

Experiment
Test and gather insights that optimize experiences, reduce risk, and drive business results.

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

| Optimizely Content Management System | Optimizely Content Marketing Platform | Optimizely Web Experimentation | Optimizely Feature Experimentation | Optimizely Customized Commerce | Optimizely Configured Commerce |

| Optimizely Digital Asset Management | Optimizely Experiment Collaboration | Optimizely Product Information Management |

| Optimizely Content Recommendations | Optimizely Personalization | Optimizely Product Recommendations |

Data Platform

Connect Platform

CMP use cases

What you want to achieve and why it matters to your business

Use cases	What do you want to achieve	Why it matters	Priority or target "GO-live"
Planning	• Manage marketing campaigns in a single place	• Internal visibility of the marketing activities	• July 2024
Collaboration and execution	• Marketing workflows from ideation to publishing	• Defined processes for organization to follow and visibility of the progress	• July 2024
Content creation	• Create and collaborate marketing materials for different channels	• Easy content creation in collaboration with internal and external stakeholders	• July 2024
Content publishing	• Publish approved from CMP to CMS • Social publishing	• Seamless content publishing	• July 2024
Digital Asset Management (DAM)	• Structured content library • Integration with CMS (asset picker)	• Easy navigation and findability of content	• July 2024
Centralization of Requests (intake)	• IT request forms implemented and routed to appropriate assignees	• Single source of truth and centralized management of requests	• July 2024

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Platform onboarding

CMP Enablement Journey

Overview

Onboarding	Post-onboarding

Other services

Discovery	→	Implementation & Adoption	→	Growth
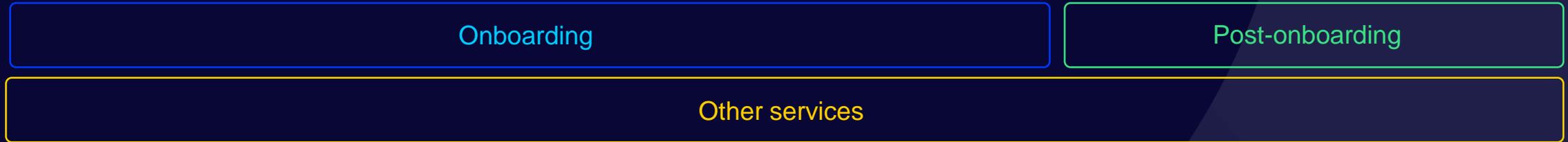
One-time Platform onboarding →

Ongoing enablement →

Discovery
Alignment
Kick-off
Discovery workshops
Admin training

Design
Platform configuration

Deployment
Configuration testing and iteration
End-user training
Wrap-up

Growth
Audit
CMP best practices and optimization
New use case adoption
New features adoption and recommendations

Roles and Responsibilities

Customer onboarding team

Kieran O'Sullivan
Executive Sponsor

Mandate time investment in the implementation, communicate progress with leadership.

(Time investment = 2-3h/month)

Zoe Lamb
Product Owner ("Platform admin")

Oversee platform governance and champion overall initiative. Possess authority and bandwidth to oversee strategy, change management, drive adoption of the new process and platform.

(Time investment = 15-25h/month)

Nada Sisalem
Project Manager

Participate in project execution, ensure key milestone are met.

(Time investment = 5-15h/month)

Dan Suzara, RJ Tubera
Tiger Team ("Platform admins & architects")

Representative users for onboarding. Preferably cross-functional, 1-2 representatives from each of the teams that will engage with the platform. Drive and champion technology change. Support adoption/ trainings. Available for front line testing, training, standing calls and feedback.

(Time investment = 8-10h/month)

Roles and responsibilities

Optimizely team

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Anna Sindalovskaya

Engagement Manager

Lead onboarding and deployment services from discovery to training with a focus on consultative platform design.

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Christian Beukes

Customer Success Manager

Drive long term success on the program. This includes overseeing the deployment, driving adoption and presenting recommendations to key customer stakeholders.

↓

support@optimizely.com

Available 24/7, identify performance anomalies and respond to technical issues.

Roles and Responsibilities

Foundation

Customer's responsibilities

Engage leaders and platform users to **drive change and platform adoption**:

- Identify key stakeholders for the onboarding (and CMP program overall)
- Ensure stakeholders' readiness for onboarding
- Define DAM roles and responsibilities
- Support the execution of the project plan
- Drive internal awareness, buy-in and alignment
- Drive internal communication plan for rollout
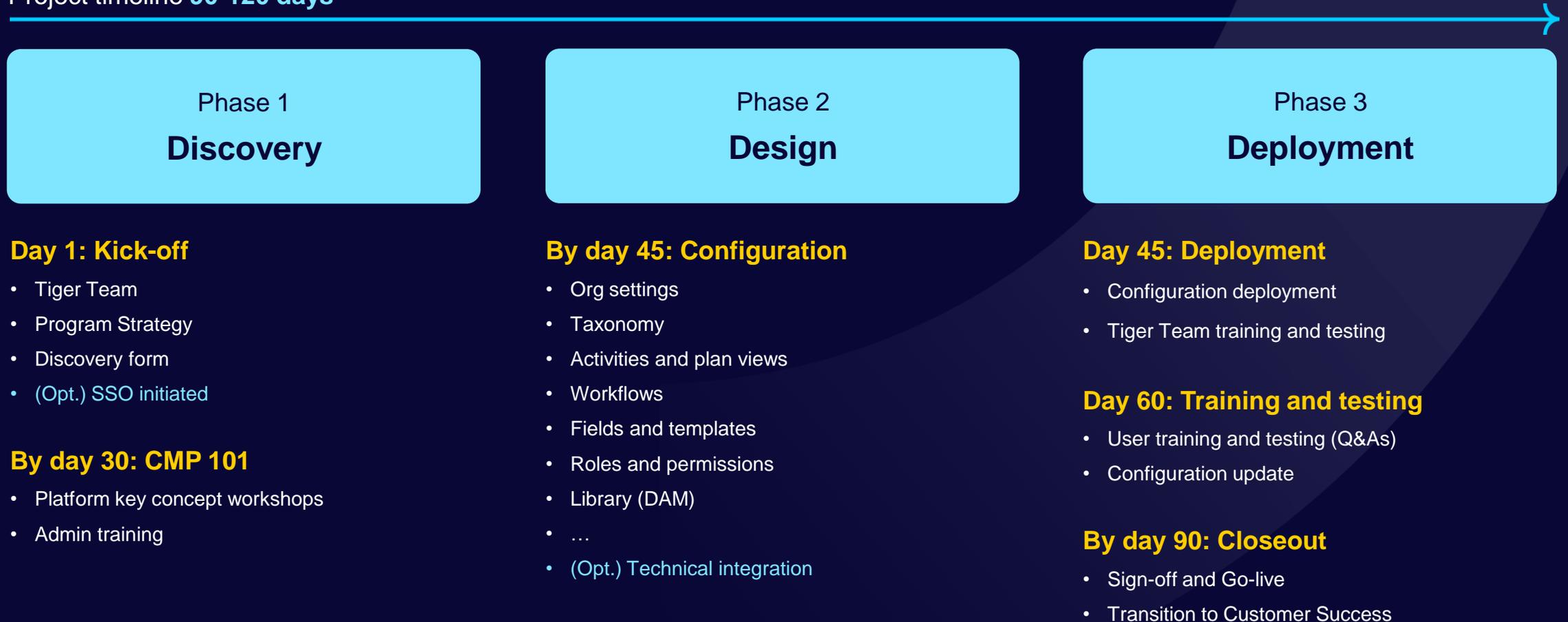- Facilitate training schedule

Optimizely's responsibilities

Provide knowledge, tools and training to **support change and platform adoption**:

- Prepare CMP environment
- Provide a tailored onboarding framework
- Support the definition and achievement of platform use cases and success criteria
- Provide and maintain onboarding project plan
- Support the design of the platform through tailored best practices and workshops
- Provide communication plan recommendations
- Develop persona-based training
- Conduct training sessions

Onboarding rollout

Project timeline **90-120 days**

| Phase 1 **Discovery** | Phase 2 **Design** | Phase 3 **Deployment** |

Day 1: Kick-off
- Tiger Team
- Program Strategy
- Discovery form
- (Opt.) SSO initiated

By day 30: CMP 101
- Platform key concept workshops
- Admin training

By day 45: Configuration
- Org settings
- Taxonomy
- Activities and plan views
- Workflows
- Fields and templates
- Roles and permissions
- Library (DAM)
- …
- (Opt.) Technical integration

Day 45: Deployment
- Configuration deployment
- Tiger Team training and testing

Day 60: Training and testing
- User training and testing (Q&As)
- Configuration update

By day 90: Closeout
- Sign-off and Go-live
- Transition to Customer Success

Onboarding layout

Activity	Description	Attendees
Alignment	**1x 1h.** Confirm readiness and project team composition, success criteria, launch date and project plan	Product Owner, Project Manager
Kick-off	**1x 1h.** Tiger Team introduction, platform demo, onboarding rollout and next steps	Product Owner, Project Manager, Tiger Team
Onboarding sync	**30min – Weekly.** Onboarding sync. Current progress, blockers, next steps	Product Owner, Project Manager
Discovery: Platform key concepts	**Up to 5x 1h.** Introduction to platform key concepts (Taxonomy, Campaign planning, Collaboration, Intake & Asset management)	Product Owner, Project Manager, Tiger Team
Training: Admin	**Up to 2 x 1h.** Training on instance settings	Product Owner, Project Manager, Tiger Team
Design: Workshops	**1h – Weekly.** Design workshops to support the configuration of the platform	Product Owner, Project Manager, Tiger Team
Training: End-users	**Up to 4x 1h.** Training on platform main modules and user journey	Product Owner, Project Manager, Tiger Team, End-users
Training: Q&A	**Up to 2x 1h.** Q&A sessions with all platform users	Product Owner, Project Manager, Tiger Team, End-users
Onboarding closeout	**1x 1h.** Onboarding review and transition to Customer Success Manager	Product Owner, Project Manager

(* Unlisted hours go towards hands-on configuration work, informal communication (email/phone), data analyzation, workshop preparation and post-meeting synthesis, project management, and alignment with the Tiger Team to ensure cohesive platform changes)

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Risks and escalation path

Risks and escalation path

Potential **blockers**

Risks	Source	Recommended action
Feature under development	Optimizely	Maintain commitment, regularly update on timelines
Lack of resource/ team turnover	Customer or Optimizely	Maintain transparency, assess resources and adjust plan
Competing project	Customer	Maintain transparency, assess resources and adjust plan
Product adoption	Customer	Champion the initiative and hit deadlines
Team buy in	Customer	Champion the initiative, create and provide success markers (internal Customer examples or external Optimizely customer examples)
Code freeze	Customer or Optimizely	Communicate dates and adjust plan
Release cycle	Customer or Optimizely	Communicate dates and adjust plan

Risks and escalation path

Points of **contact**

Escalation path	Customer	Optimizely
Stage 3 Risk or blocker that threaten our partnership	Executive Sponsor (Kieran O'Sullivan)	Director of Professional Service (Victoria.Golden@optimizely.com)
Stage 2 Risk or blocker	Product Owner (Zoe Lamb) / Project Manager (Nada Sisalem)	Manager, Engagement Management (Suzanne.Kavanagh@optimizely.com)
Stage 1 Business as usual	Project Manager (Nada Sisalem)	Engagement Manager (Anna Sindalovskaya)

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CMP dive-in

Platform feedback

Share it!

Is there a pain point or a business need you can't solve in the platform?

Our product team wants to hear it!

Optimizely customer feedback

A 3-step process

1. Identify key stakeholders for the integration deployment

2. Ensure stakeholders' readiness for the integration deployment project

3. Support the execution of the project plan

Other useful links

• Support Help Center (technical issues, platform questions, and documentation)

• Optimizely product updates

Content Marketing Platform funnel starts with...

...a plan...

"Let's plan the execution of our next program."

Campaign
Program, project, initiative

Task
Deliverable, tactic

Workflow
Steps

Job done / Content created

...a request...

"I need a new brochure. Can someone help?"

...or an asset.

"This logo needs an update"
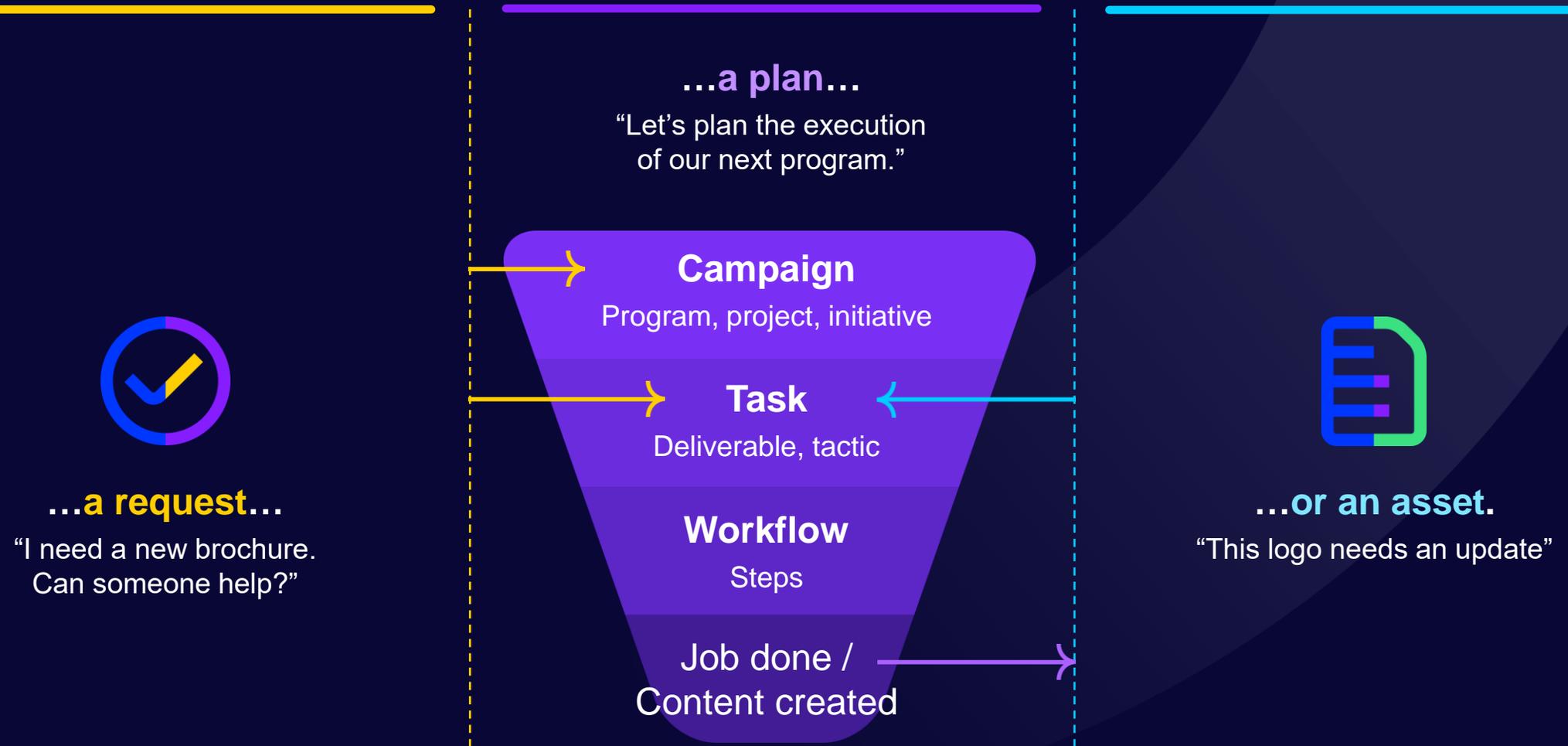
(Platform demo)

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Next steps

Next steps

Let's get started!

Customer's tasks

1. Review starter kit
2. Complete Discovery form
3. Confirm program strategy
4. Confirm Tiger Team composition
5. Rally Tiger Team

Optimizely's responsibilities

1. **Share with customer:**
   - Starter kit
   - Discovery form
2. **Prepare:**
   - Onboarding plan in the platform
   - Platform configuration files
3. Provide access to platform owner
4. Schedule weekly workshops (w. Tiger Team)
5. Schedule weekly onboarding sync (w. program owner)