

Optimizely Opal–powered AI Driven Promotion Management

Problem Statement

Modern e-commerce teams struggle to manage promotions across multiple channels efficiently. Manual, fragmented processes force marketers to depend on technical teams, causing delays and missed opportunities.

Businesses need an AI-driven, conversational solution that lets marketing teams create, update, and monitor promotions in real time—without technical expertise—while integrating seamlessly with existing commerce platforms.

Justification for the solution

Promotions drive revenue and engagement in e-commerce, yet most businesses rely on manual, fragmented processes that slow execution and create bottlenecks. These inefficiencies lead to missed opportunities, delayed market responses, and heavy dependence on technical teams.

As businesses scale across markets and channels, managing promotions becomes increasingly complex. Without an automated, AI-driven solution, marketers struggle to deliver timely, personalized offers—risking customer dissatisfaction and lost sales. Solving this ensures faster time-to-market, greater efficiency, and a competitive edge where speed and personalization are critical.

Process

- 1) **Environment:** Set up Optimizely CMS 12 / Commerce 14 (.NET 6/8) and enable Opal instance with admin access and AI features.
- 2) **Promotion Service:** Build an ASP.NET Core service using Optimizely Opal C# SDK. Implement endpoints for promotion CRUD and enable/disable, mapped to EPiServer APIs.
- 3) **Tool Discovery:** Create opal discovery endpoint to expose tool metadata. Register in Opal’s Tool Registry for schema sync and auto-refresh.
- 4) **Specialized Agent:** Configure an Opal agent linked to promotion tools, variables, and guardrails. Add confirmation prompts and optional test-run workflows.
- 5) **Conversational Workflow:** Marketers use Opal Chat for natural-language commands (e.g., “create 10% off weekend promo”). Agent interprets, validates, and calls Commerce endpoints.