

# Build an Automated Personalization Experience

The Automated Personalization algorithm shows the right content to each customer on your site. It's most effective when you have the time to allow the Automated Personalization experience to complete a state of learning.

## Exploration and Exploitation

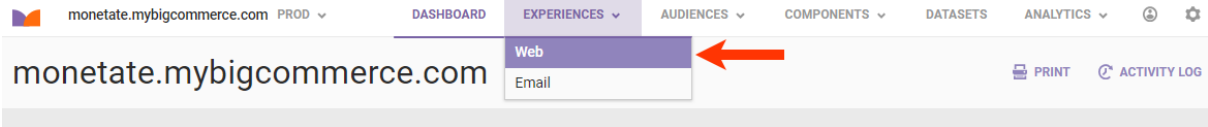
The Automated Personalization experience is an online learning solution that begins with no assumptions about behavior on your site. It leverages observations to learn what experiences are best for each individual based on each person's unique context.

The Automated Personalization algorithm balances two concepts: exploration and exploitation. This means Monetate serves variants early in the experience across all individuals with different context variables. The result is that the Personalization Engine collects observational data about how visitors with different context behave against each of the variants in this experience. The collection phase is called exploration. If there are observations that statistically demonstrate better performance, the algorithm begins to exploit this learning. The Automated Personalization algorithm always balances and intermixes exploration (learning) and exploitation (performing or targeting).

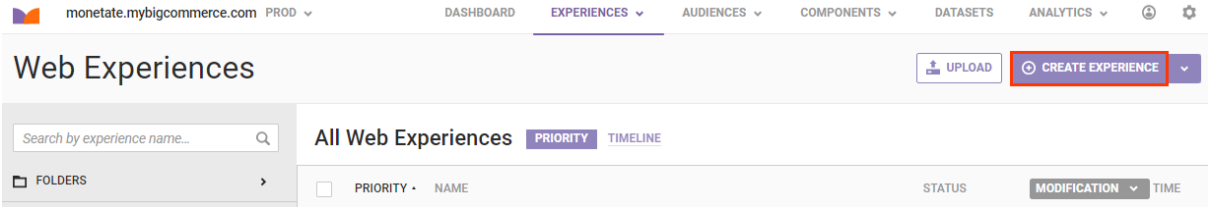
## Building an Automated Personalization Experience

Follow these steps to create an Automated Personalization experience.

1. Click **EXPERIENCES** in the top navigation bar and then click **Web**.



2. Click **CREATE EXPERIENCE**.



3. Configure the WHY settings.
  - a. Click **WHY**, select **Automated Personalization**, and then click **NEXT**.

WHY

WHO

WHAT

WHEN

---

1 Why are you running this experience?

**To optimize my goal with Machine Learning.**

**Automated Personalization**

Use Automated Personalization to serve the best-fit variant to each *individual* customer.

*Highest ROI better for long-running experiences with high traffic volume*

**Dynamic Testing**

Use Dynamic Testing to monitor experience results in real time and automatically allocate more traffic to the winner.

*Better for short-running experiences with limited traffic*

Note: This experience will start with an even distribution between variants until the engine begins to learn.

**RECOMMENDED**

**MACHINE LEARNING**

To serve everyone the same experience. **100% EXP**

To test multiple metrics with random traffic allocation. **STANDARD TEST**

**NEXT**

b. Select the **goal metric** you want to optimize with this experience, and then click **NEXT**.

Ensure you put some time and thought into selecting the most appropriate goal metric for an Automated Personalization experience. Monetate makes one-to-one decisions to maximize that goal metric.

**1 Why are you running this experience?**

✓

**To optimize my goal with Machine Learning.**

RECOMMENDED  

MACHINE LEARNING

**Automated Personalization**

Use Automated Personalization to serve the best-fit variant to each *individual* customer.

AUTO PERSONALIZATION

Highest ROI, better for long-running experiences with high traffic volume

**2 Goal**

Which metric do you want to optimize with this experience?

★ Select a goal metric below

Search for metric by name...

GOAL	METRIC	
★	Conversion rate	DEFAULT
★	New customer acquisition rate	DEFAULT
★	Add to cart rate	DEFAULT
★	Cart abandonment rate	DEFAULT
★	Bounce rate	DEFAULT
★	Revenue per session	DEFAULT
★	Average page views	DEFAULT

BACK

NEXT

- c. Select any secondary metrics that you want to track with the Automated Personalization experience, and then click **NEXT**.

The Automated Personalization algorithm personalizes based on the goal metric you select in the previous step. Since the Personalization engine isn't optimizing for secondary metrics, it's possible that they may underperform within the experience.

**2 Goal**


★ Conversion rate

**3 Confirm Secondary Metrics**

These metrics will be tracked as you optimize your goal.

+ ADD METRIC

Cart abandonment rate	DEFAULT
Bounce rate	DEFAULT
Revenue per session	DEFAULT
Average page views	DEFAULT
Average time on site	DEFAULT
Average order value	DEFAULT
Example Click Event	
mouseoverevent	

BACK NEXT 

- d. Verify that you have configured the WHY settings properly, and then click **SAVE**.

**4 Confirm**

I would like to **use Automated Personalization to serve the best-fit variant to each individual customer to optimize Conversion rate and 9 additional metrics.**

SAVE CANCEL

4. Configure the WHO settings as necessary if you need to narrow the target audience for the experience. See [Configure Experience Targeting](#) for the steps.

WHY to optimize Conversion rate using Automated Personalization to serve the best-fit variant to each individual customer.


WHO For all visitors

WHAT A Add action...

Baseline

WHEN from Feb 10 2023, 10:35 AM ongoing

HOW Using 19 Context Variables for 1:1 decisions versus a 20% random assignment holdout

WHO  [ADD TARGET](#)

All visitors to your site will see this experience.

Add a target if you'd like to deliver this experience to a specific portion of your audience.

5. Configure at least one action for the WHAT settings. See the [Action Types](#) documentation category to learn more about action options.

WHY to optimize Conversion rate using Automated Personalization to serve the best-fit variant to each individual customer.


WHO For all visitors

WHAT A Add action...

Baseline

WHEN from Feb 10 2023, 10:35 AM ongoing

HOW Using 19 Context Variables for 1:1 decisions versus a 20% random assignment holdout

WHAT  [ADD ACTION](#)

6. Configure the WHEN settings as necessary to define when and for how long the experience should run. See [Configure Experience Timing](#) for the steps.

WHY to optimize Conversion rate using Automated Personalization to serve the best-fit variant to each individual customer.

WHO For all visitors


WHAT A show Once per session -> Every page No Image

B show Once per session -> Every page Product Collage + Offer

Baseline

WHEN from Feb 10 2023, 10:35 AM ongoing

HOW Using 19 Context Variables for 1:1 decisions versus a 20% random assignment holdout

NO IMAGE - WHEN [START AND STOP TIME](#)  from February 10, 2023 at 10:35 AM ongoing [BACK](#)

7. Configure the HOW settings as necessary if you need to customize the context variables and traffic assignment percentages.

a. Click **HOW**.

The screenshot shows a configuration interface with several sections: WHY, WHO, WHAT, WHEN, and HOW. The HOW section is highlighted with a red border and contains the text: "Using 19 Context Variables for 1:1 decisions versus a 20% random assignment holdout".

b. Click **EDIT** for the Engine Context section.

The screenshot shows the configuration interface with the Engine Context section expanded. An orange arrow points to the "EDIT" link next to "Engine Context". Below this, there is a section titled "Configure Holdout" with a table showing variant assignment methods and traffic percentages.

VARIANT ASSIGNMENT METHOD	VARIANTS	TRAFFIC
Holdout   Random Assignment to measure performance	A B Ba	20%
Automated Personalization   Automated Personalization to optimize your goal	A B Ba	80%

c. Expand the context category that you want to edit, and then click to select or deselect the context variable(s) you want to add or remove from the experience. See [Engine Context](#) for more information about these variables.

**Engine Context** EDITING

How would you like The Engine to inform its 1:1 decisions?

The Engine will use **19** Context Variables when deciding which variant an individual should see.

19/358

[← RESET TO ACCOUNT DEFAULT](#)**Visitor Info**▼ **Time of Arrival** 2/2

NAME	TYPE	DESCRIPTION
<input checked="" type="checkbox"/> Time of Day	CATEGORICAL	The time of day when a visitor arrives on your site (overnight, morning, afternoon, evening)
<input checked="" type="checkbox"/> Day of Week	CATEGORICAL	The day of week when a visitor arrives on your site (Monday-Sunday)

▼ **Location** 0/2

NAME	TYPE	DESCRIPTION
<input type="checkbox"/> Country	CATEGORICAL	A visitor's country location when they arrive on your site
<input type="checkbox"/> Census Region	CATEGORICAL	A visitor's census region when they arrive on your site (US only)

> **Device** 5/5> **Landing** 1/1d. Click **SAVE**.

## Engine Context EDITING

How would you like The Engine to inform its 1:1 decisions?



The Engine will use **15** Context Variables when deciding which variant an individual should see.

15/358

[← RESET TO ACCOUNT DEFAULT](#)

### Visitor Info

▼ **Time of Arrival** 0/2

NAME	TYPE	DESCRIPTION
<input type="checkbox"/> Time of Day	CATEGORICAL	The time of day when a visitor arrives on your site (overnight, morning, afternoon, evening)
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> **Location** 0/2

> **Device** 5/5

> **Landing** 1/1

> **Demographics** 0/2

> **Weather** 3/3

### Behavior

> **Session Counts** 2/2

> **Products** 4/6

> **Experiences Viewed** 0/2

**SAVE**

CANCEL

Configure Holdout [LEARN MORE](#)

e. Click **EDIT** for the Configure Holdout section.



**HOW** Using 15 Context Variables for 1:1 decisions versus a 20% random assignment holdout

**Engine Context** [EDIT](#)

How would you like The Engine to inform its 1:1 decisions?

The Engine will use **15** Context Variables when deciding which variant an individual should see.

**Configure Holdout** [LEARN MORE](#) [EDIT](#)

How would you like to measure the performance of your Automated Personalization experience?

VARIANT ASSIGNMENT METHOD	VARIANTS	TRAFFIC
Holdout   <i>Random Assignment to measure performance</i>	<span>A</span> <span>B</span> <span>Ba</span>	20%
Automated Personalization   <i>Automated Personalization to optimize your goal</i>	<span>A</span> <span>B</span> <span>Ba</span>	80%

- f. Optionally, change the holdout type. Click **Random Assignment**, select **Single Variant Holdout**, then select which variant should be assigned the holdout traffic, and then select what percentage of the traffic you want assigned to the holdout.

The Engine will use **15** Context Variables when deciding which variant an individual should see.

**Configure Holdout** [LEARN MORE](#) [EDIT](#)

How would you like to measure the performance of your Automated Personalization experience?

VARIANT ASSIGNMENT METHOD	VARIANTS	TRAFFIC
Holdout   <i>Random Assignment to measure performance</i>	<span>A</span> <span>B</span> <span>Ba</span>	20%
Automated Personalization   <i>Automated Personalization to optimize your goal</i>	<span>A</span> <span>B</span> <span>Ba</span>	80%

- g. Click **SAVE**.

**Configure Holdout** [LEARN MORE](#) [EDITING](#)

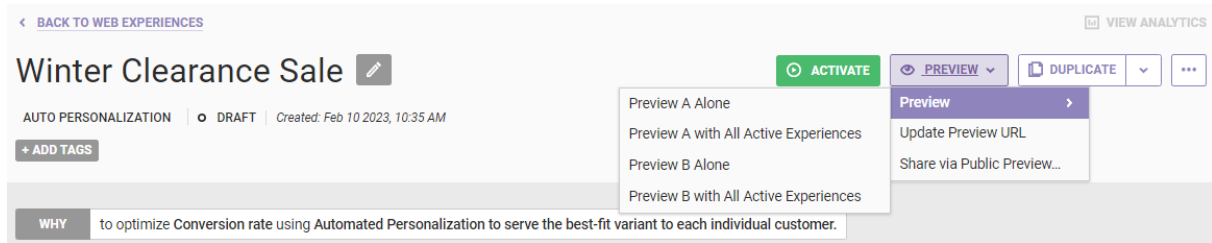
How would you like to measure the performance of your Automated Personalization experience?

VARIANT ASSIGNMENT METHOD	VARIANTS	TRAFFIC
Holdout   <b>SINGLE VARIANT</b> <i>to measure performance</i>	<span>B</span>	20%
Automated Personalization   <i>Automated Personalization to optimize your goal</i>	<span>A</span> <span>B</span> <span>Ba</span>	80%

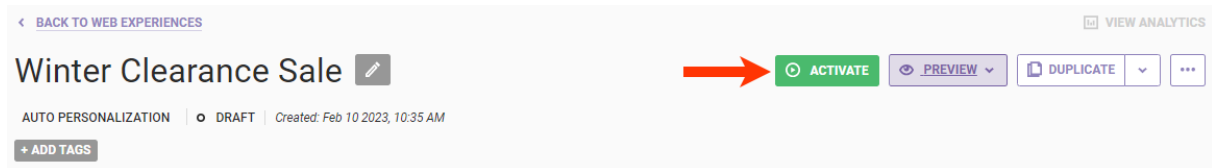
**SAVE** **CANCEL**

8. Click **PREVIEW** and then select the option that corresponds to the variant you want to preview and if you

want to preview it alone or with all other active experiences. See [Activate an Experience for Preview and Testing](#) for more information.



9. Click **ACTIVATE** to deploy the experience to your site as determined by the WHEN configuration.



Refer to [Experience Priority](#) and [Enable Auto-Promotion for Experiences](#) for more information about how experiences are prioritized.