



# **Klaviyo CDP Use Cases**

The smarter CDP, built for faster results.

# Get the most out of Klaviyo CDP and plug in your entire tech stack by leveraging 300+ out-of-the-box integrations

## Ecommerce platforms

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## Social media / UGC

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## Subscriptions / Payments

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## Shipping & logistics / returns

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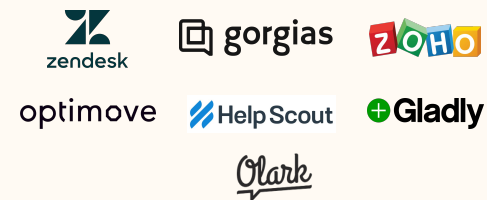
## Loyalty, reviews, referrals

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## CRM / helpdesk

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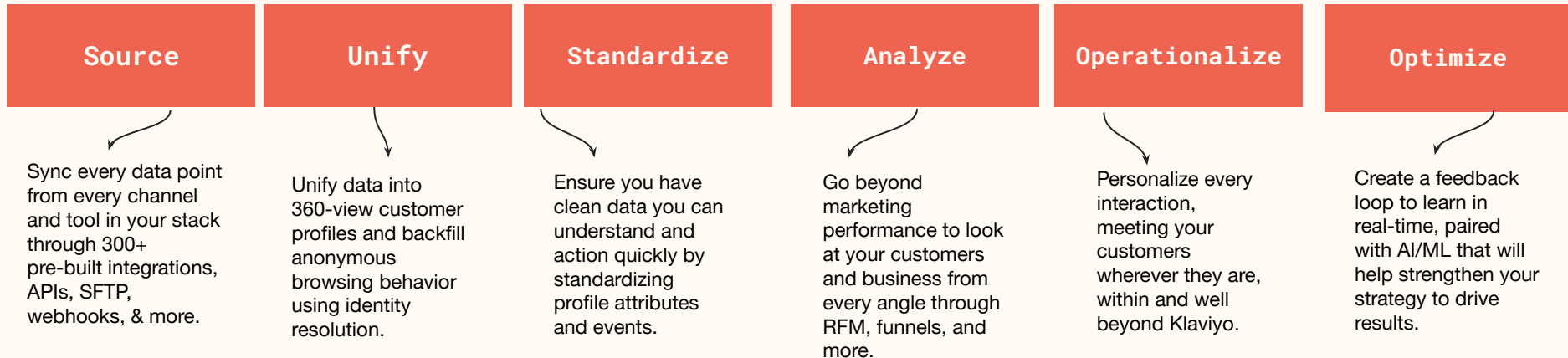


# Why Klaviyo CDP?

With Klaviyo's Marketing Application, you can bring data in from a set number of sources, establish primary customer profiles, act on that data for marketing within Klaviyo, and analyze how well your marketing is performing using a suite of standard reports.



As your business grows, so does your opportunity to leverage customer data, to **grow both faster and smarter.** Klaviyo for Marketing + Klaviyo CDP puts customer data where it should be, at the center of everything.



# How Klaviyo CDP extends the power of Klaviyo

	Klaviyo	Klaviyo + CDP
<b>Analytics/modeling</b>	Standard marketing performance and insights Out-of-the-box predictive analytics	Advanced audience-level reporting & visualizations with flexible predictive modeling
<b>Data management / manipulation</b>	Raw data formatting	Data hygiene and transformation tooling to cleanse & standardize data
<b>Data syncing</b>	Trigger individual webhooks in a flow for marketing use cases	Real-time and periodic data syncs via expanded webhooks and data warehouse connections
<b>Marketing</b>	Omnichannel marketing automation	Personalize onsite experiences  Expanded use cases via advanced data tracking, data syncing to other systems, and new buyer profiles to target
<b>Implementation</b>	Simple setup with 300+ pre-built integrations and no need to preconfigure schema	Minimal additional setup and implementation



## Smarter marketing, at scale, in a few clicks.

Trigger flows based off RFM group change

**Insight:** In your **RFM analysis**, you find that over the last 6 months your Needs Attention cohort is growing.

**Action:** Create a flow when someone moves from RFM Champion, Loyal, or Recent, to Needs Attention

**Bonus:** Use **data transformation** to standardize country values and target cohorts by country, ensuring you capture your full audience.

**Result:** Drive increased repeat purchase rates & CLTV

### Create segment

Cancel

**New segment**  
Segments allow you to track and analyze people who meet certain conditions

Name:  Select tags:

**Create Segment**  
Recipients must be consented to receive messages

Properties about someone

Previous month RFM group  equals  Recent, Loyal, Chamion Type:

And

Properties about someone

Current month RFM group  equals  Needs Attention Type:



### New flow

←

**Actions**

- Email
- SMS
- Profile property
- Push notification
- Webhook
- Delay

**Logic**

- Conditional split

**Trigger**  
Became Needs Attention

**#1 - Retention Series**

Hey [name], We miss you and hope you're well. We have great new products for you [product feed]. Here's 15% off for new products.

**#2 - Retention Series**

Hey [name], still thinking about our great products? Here is preview to our upcoming line..

## Pinpoint opportunities to move customers from nurture to purchase.

Optimize your pre- and post- purchase customer journeys

**Insight:** Your **funnel analysis** shows that customers who sign up for a recent giveaway are engaging with your newsletter, but not purchasing

**Action:** Optimize your flows and, using the **group membership API**, customize your homepage experience to address points of drop off

**Result:** Increase conversions and drive incremental revenue

### Bote Boards Giveaway

Filtered by segment: Sea To Summit Sweepstake Entries (Net New)

Edit

2,884

Received Email

443

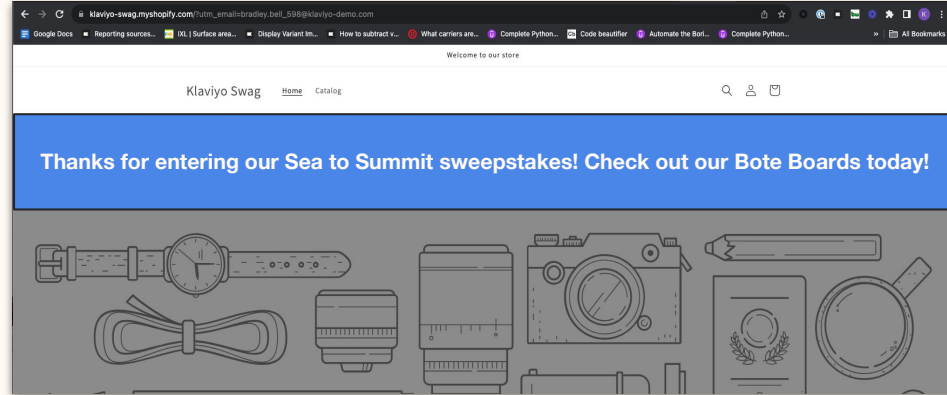
Clicked Email  
15.4% of prior step

58

Added to Cart  
13.1% of prior step

24

Placed Order  
41.4% of prior step



# Use Case Strategy

How can we help our customers realize value?

Start with what they are looking to achieve.

# Increase repeat purchase rate



## Automate messages when a valued customer becomes at risk

Source

Unify

Standardize

Analyze

Operationalize

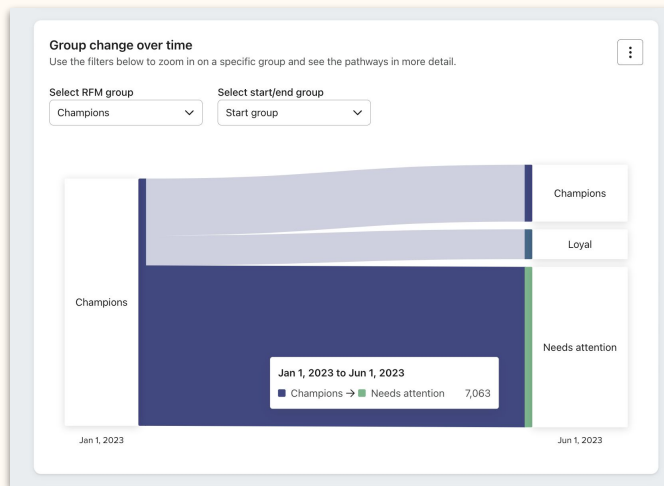
Optimize

**Insight:** High-value customers are becoming at risk of being inactive

**Action:** Create a flow when someone moves from RFM “Champion” to “Needs Attention” or “At risk”

- Create a segment of customers who were previously “Champions” but are now “At risk” or “Needs attention”
- Create a flow with a segment-based trigger to enter them in a multistep nurture when they become “At risk” or “Needs attention”

**Recommendation:** Offer a special offer – high discount, early product access, BOGO – to incentivize a repeat purchase from a formerly valuable customer



**Name**  
Champions who become at risk / needs attention

**Definition**

Properties about someone  
\$previous\_month\_rfm\_group equals Champions

**+ AND**

Properties about someone  
\$current\_month\_rfm\_group equals At risk

**OR**

Properties about someone  
\$current\_month\_rfm\_group equals Needs attention



Trigger

When someone **joins Champions** who become at risk / needs attention.

**Metrics to track success:** KAV, revenue per recipient, Champion segment growth

## Champions to Loyalty Members

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** Customers are becoming “Champions” but not yet part of your loyalty program.

**Action:** Add a flow to push “Champions” to join your loyalty program

- Create a flow that triggers by customers joining the segment RFM “Champion”
- Add a filter “Loyalty Program” is false

RFM Champions enrolled in Loyalty Program Segment

Members (0)

Settings

Edit definition

Segment growth

Engage

**Metrics to track success: Loyalty signups**

### Group change over time

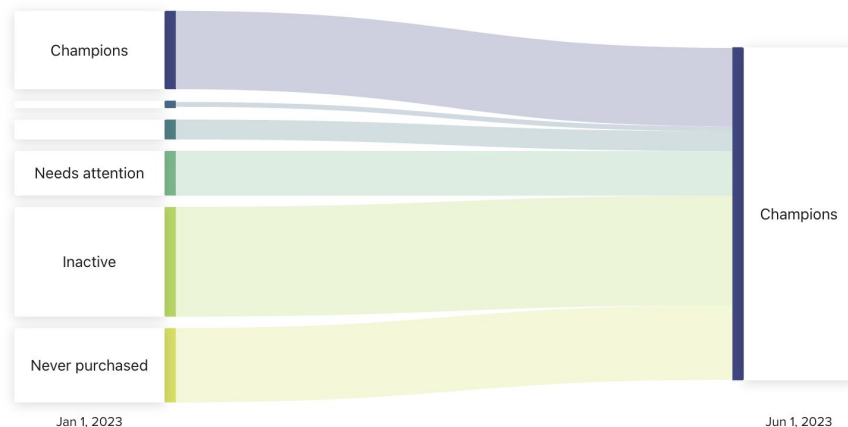
Use the filters below to zoom in on a specific group and see the pathways in more detail.

Select RFM group

Champions

Select start/end group

End group



## Champions to Loyalty Members (cont.)

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Use Case:** Drive RFM group “Champions” to join your loyalty program through targeted messaging

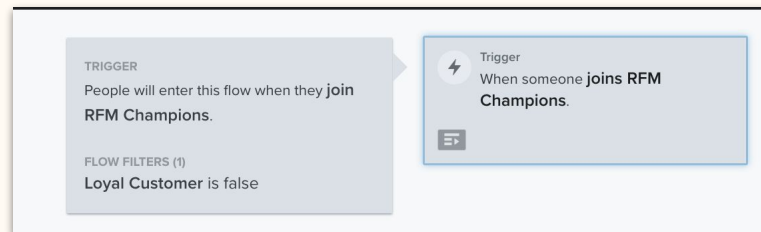
### Action:

- Create a flow that triggers by customers joining the segment RFM “Champion”
- Add a filter “Loyalty Program” is false

**\*Expansion\*** If you already have a loyalty signup flow, you can add a split to incentivize your Champions!

**Bonus Recommendation:** Offer them a free item or bonus points to join your loyalty program!

**Metrics to track success:** Loyalty signups



## Retain Loyal customers when they become a churn risk

Source

Unify

Standardize

Analyze

Operationalize

Optimize

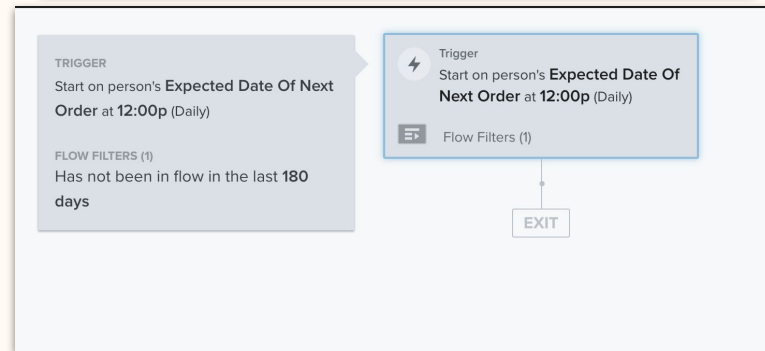
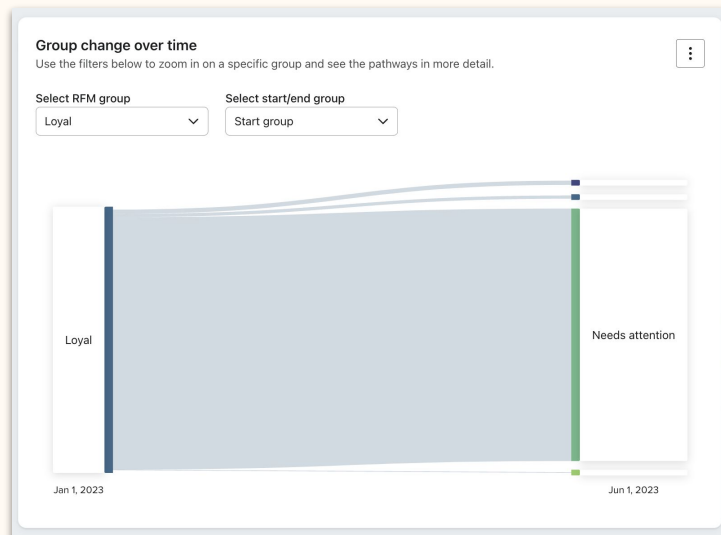
**Insight:** “Loyal” customers are moving to “Needs attention” over the last 6 months.

**Action:** Add a repeat purchase nurture series based on expected data of next order

- Create a flow that counts down to the expected date each individual customer will re-order.
- The trigger for this date-based flow will be Klaviyo’s “Expected Date of Next Order”
- Add filter “And has not been in this flow in the last 180 days” to ensure that a customer only receives this nurture once every 6 months.

**Recommendation:** Offer a discount to incentivize that next purchase and prevent churn; consider a lower discount than what you might already be offering in win-back series. Or, include a personalized product feed that recommends products each customer might like based on past purchases.

**Metrics to track success:** KAV, revenue per recipient, click rate, repeat purchase rate



## Move customers from nurture to purchase

Source

Unify

Standardize

Analyze

Operationalize

Optimize

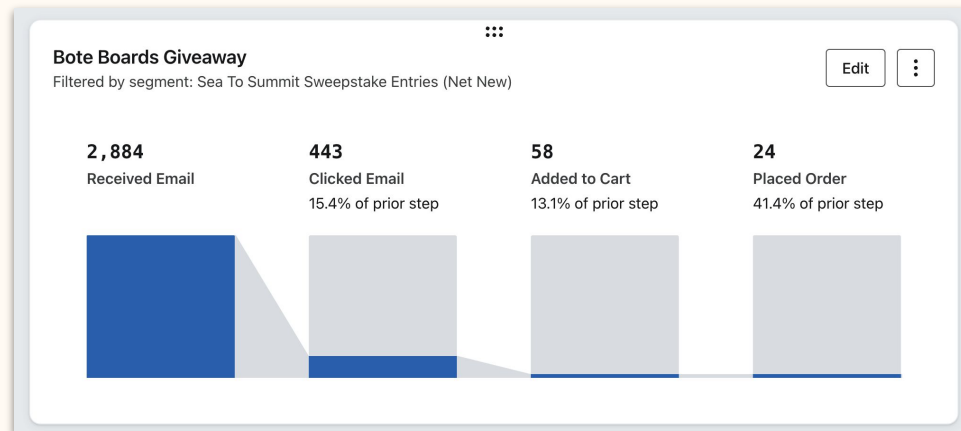
**Insight:** Your funnels show that customers who sign up for sweepstakes or your newsletter are engaged, but not purchasing.

**Action:** Optimize your flows and web experience to address drop-off points.

- Test out creating targeted Browse Abandonment and Cart Abandonment flow paths for sweepstake entries that reflect similar branding and product placement as the contest they are running,
- Test out new checkout options for customers who drop off right before placing an order

**Recommendation:** Try expedited checkout options like one-page checkout or Apple Pay / Shop Pay / PayPal.

**Metrics to track success:** KAV, revenue per recipient, conversion rate, sweepstakes segment performance



## Identify and prevent churn

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** You identify that your customers most often become Inactive after 200 days of no purchases.

**Action:** Use customized CLV window to identify customers at risk for churn, send a personalized email or SMS campaign to incentivize a timely purchase

- Change the prediction window to 200 days
- Build a segment based on customers who have a high-value predicted CLV and haven't purchased in the last 100 days

**Recommendation:** Use product blocks to include personalized product recommendations based on previous purchases or recent engagement.

To show or hide a block based on someone's group membership, use this conditional statement:  
`person|lookup:$current_month_rfm_group' == 'Champions'`

**Metrics to track success:** KAV, revenue per recipient, click rate, segment change

**Predicted date range**  
 Updating your prediction window will affect assets that use Predicted CLV, Total CLV, or Predicted Number of Orders.

200 days

**Historic date range**  
 All time (2,081 days)

**Prediction confidence** 📄 ✔ Highest

Save Preview ?

Name  
 High value customers who haven't purchased in 100 days

Definition

Predictive analytics about someone

Predicted Customer Lifetime Value is at least 500

+ AND

What someone has done (or not done)

Has 🔒 Placed O... at least once in the last 100 days

Add Filter

## Optimize upcoming campaigns

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** Your “At risk” customers have been growing MoM.

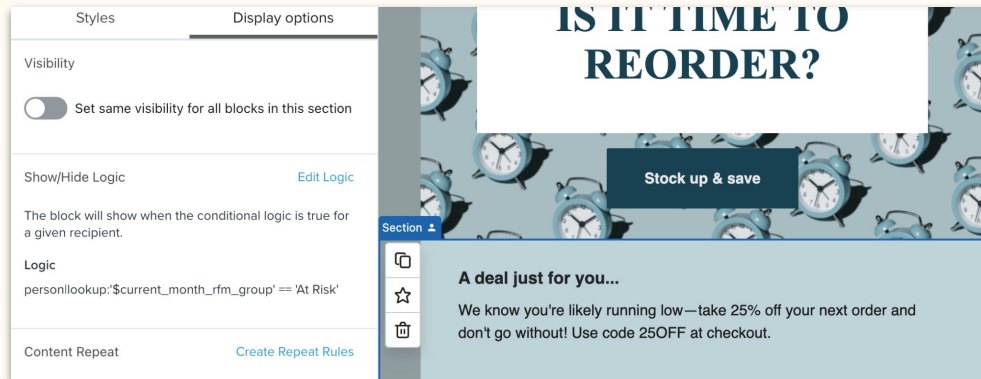
**Action:** Send them a personalized offer in your upcoming campaign to your engaged audience.

- Create an RFM segment of current “At risk” customers
- Build a conditional block with a personalized offer and discount-code unique to this segment

**Recommendation:** Use conditional content blocks in the same campaign to maximize efficiency and show personalized offers and/or products to specific “At risk” audiences.

To show or hide a block based on someone’s group membership, use this conditional statement:

```
personlookup:$current_month_rfm_group' == 'At Risk'
```



*Here, we're giving a 25% offer to only currently “At risk” customers in a campaign sent to all engaged customers, to try and get ahead of their churn risk.*

**Metrics to track success:** KAV, revenue per recipient, revenue from At risk segment, At risk segment change

## Supercharge campaigns to at risk audiences

Source

Unify

Standardize

Analyze

Operationalize

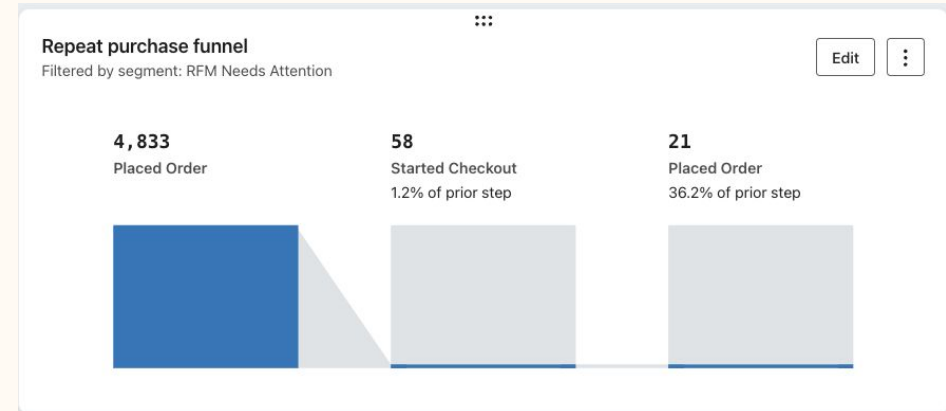
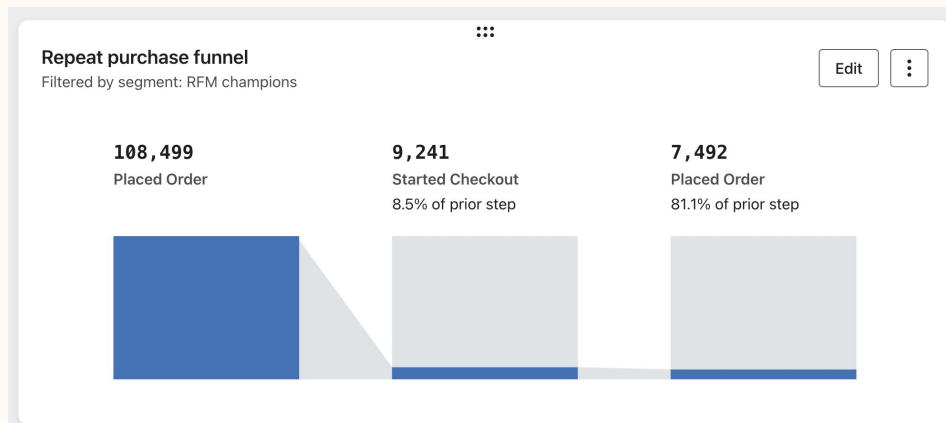
Optimize

**Insight:** Your repeat purchase funnel shows that your Needs Attention segment is repurchasing at a much lower rate over the last year.

**Action:** Run one-off campaigns targeting Needs Attention segment to drive incremental lift quarterly

**Recommendation:** Cross-sell items in the same category as ones they've previously purchased, a free item when they purchase, or offer limited access to a complementary product.

**Metrics to track success:** KAV, revenue per recipient, Needs Attention segment change, Needs attention segment repeat purchase rate





## Promote multiple repeat purchases in your winback

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** Your RFM Analysis shows that while your Champions are largely being retained and repurchasing, getting a greater % of customers from 2 to 3 purchases is an opportunity.

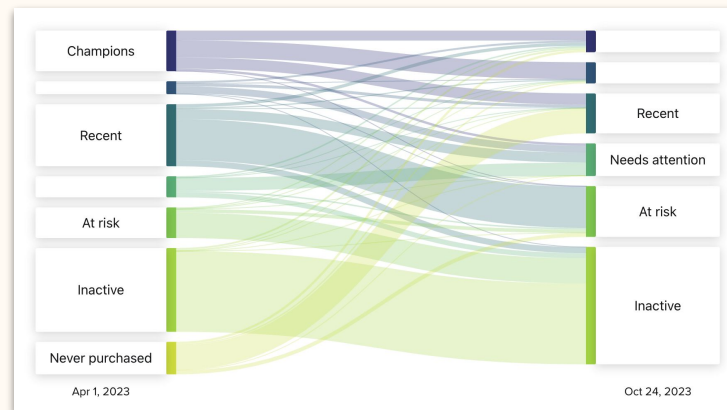
**Action:** Add Conditional Splits for 2x Buyers in your Winback Series

- For those that have purchased 1x, split based on what category the customer purchased to cross-sell a next-best category to draw the customer towards a more personalized next purchase — offering a discount to incentivize.
- For those that have purchased twice or more, add a Conditional Split to focus on differentiated content paired with a lower discount (or no offer incentive if desired) to still leverage the opportunity for these triggered timely touchpoints.

### Recommendations:

- Test different messaging specific to purchase number
- Promote loyalty program (if applicable)
- Promote subscription options (if applicable)

**Metrics to track success:** KAV, revenue per recipient, Champion segment repurchase rate, revenue from Champion segment



Median performance				
Start date	End date			
Group	Days since purchase	Number of placed orders	Placed order revenue	
Champions	50	4	\$222.14	
Loyal	272	3	\$190.55	
Recent	112	1	\$61.02	
Needs attention	511	2	\$146.62	
At risk	339	1	\$54.15	
Inactive	714	1	\$47.47	

## Retarget engaged, high value customers

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** Over the last 6 months, Champion and Loyal customers are steadily decreasing.

**Action:** Use RFM to retarget recently engaged audiences on paid advertising

- After running recent email campaigns, segment out RFM Champion or Loyal customers who were engaged in these campaigns (i.e. opened, clicked) but didn't purchase.
- Send these segments to Facebook, Instagram, and Google to retarget these audiences with a personalized offer.

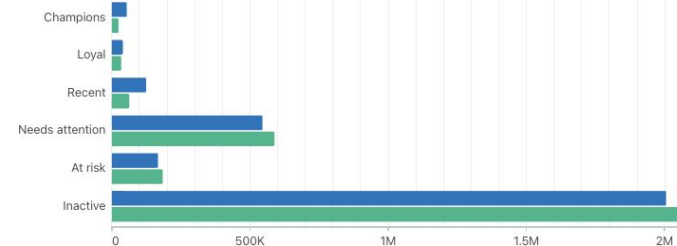
**Recommendation:** Consider using an offer higher/different from your email campaign to get them over the line.

**Metrics to track success:** Return on ad spend, Champion and Loyal segment growth & revenue

### Compare distribution of customers

Customers Added or dropped Percent change

May 18, 2023 Nov 17, 2023



### Compare distribution of customers

Customers Added or dropped Percent change

Group	Start total	Start %	End total	End %	% Change
Champions	53,613	1.80%	24,183	0.81%	-54.89%
Loyal	40,148	1.35%	34,139	1.15%	-14.97%
Recent	124,013	4.17%	62,917	2.11%	-49.27%
Needs attention	539,426	18.1%	583,244	19.6%	8.12%
At risk	171,757	5.77%	188,229	6.32%	9.59%
Inactive	2,006,357	67.4%	2,083,641	70.0%	3.85%

## Drive higher AOV with high value customers

Source

Unify

Standardize

Analyze

Operationalize

Optimize

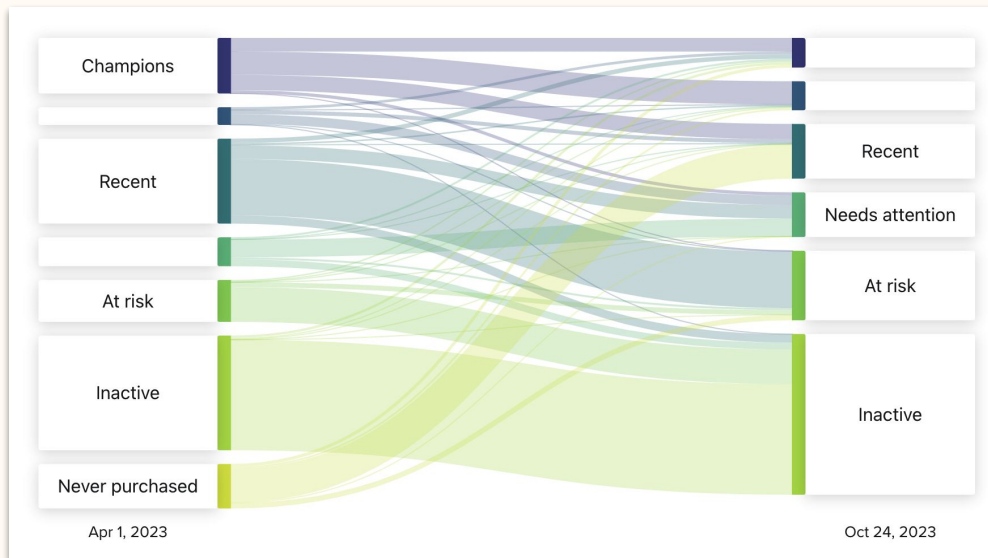
**Insight:** Your AOV is below your target.

Your Loyals are customers that purchased often or recently, and spend a good amount. They spend less, however, than your Champions, and also purchase less frequently overall.

**Action:** Create a flow that triggers when someone lapses from Champion to Loyal

- Create a segment of customers who were previously “Champions” but are now Loyal
- Create a flow with a segment-based trigger to enter them in a multistep nurture when they become Loyal

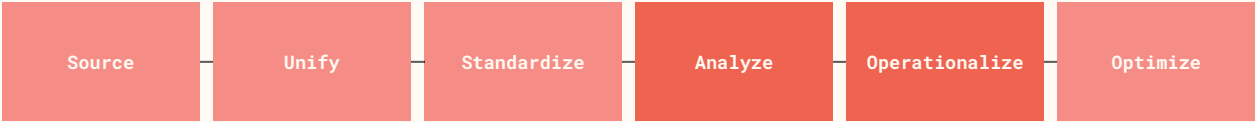
**Recommendation:** Promote a special offer focused on a higher AOV — such as bundling, or giving a discount if the customer purchases above a certain amount



**Metrics to track success:** AOV, KAV, revenue per recipient, Champion segment growth

# CRAWL

## Retain high value customers through subscriptions



**Insight:** Over the last quarter, you’re seeing Loyal and Champions customers move to At Risk.

**Action:** Run a one-time campaign to offer a month free on your subscription or limited access to a new product line they might be interested in.

- Create a segment of customers who were previously “Champions” but are now “At risk” or “Needs attention”
- Create a personalized email campaign (or SMS, if they are subscribed)

Name  
Champions who become at risk / needs attention

Definition

Properties about someone

\$previous\_month\_rfm\_group equals Champions

+ AND

Properties about someone

\$current\_month\_rfm\_group equals At risk

OR

Properties about someone

\$current\_month\_rfm\_group equals Needs attention

**Recommendation:** Use product blocks to include personalized product recommendations based on previous purchases or recent engagement.

**Metrics to track success:** KAV, revenue per recipient, segment growth

**Hey Miles!**

Thank you for your order from the Miles Online Store! Once you've received your order, we'll ship it to you. You'll receive a confirmation email with tracking information.

Below this, you'll see the items that were added to your order and as well as a link to track your order. You can also see the items that were added to your order and as well as a link to track your order.

In the last section, you'll see the items that were added to your order and as well as a link to track your order.

Interested in learning more?

[Track & Order](#)

**Here are your order details, Miles!**

**Cleansing Facial Wash - Mint**  
Qty: 1  
Price: 9.99

**Hydrating Face Mist**  
Qty: 1  
Price: 9.99

[Reorder Your Items](#)

**Top Recommendations for Miles**

**Daily Moisturizer**  
Price: 9.99

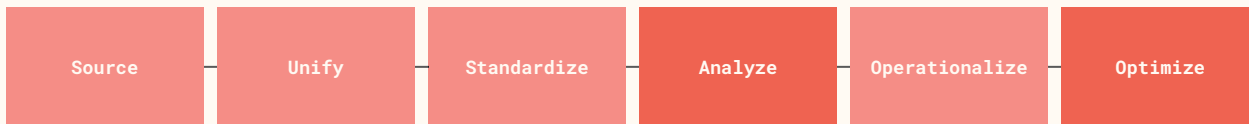
**Rejuvenating Serum**  
Price: 10.00

**Top Recommendations for Miles**

**Daily Moisturizer**  
Price: 9.99

**Rejuvenating Serum**  
Price: 10.00

## Optimize based on last year's performance



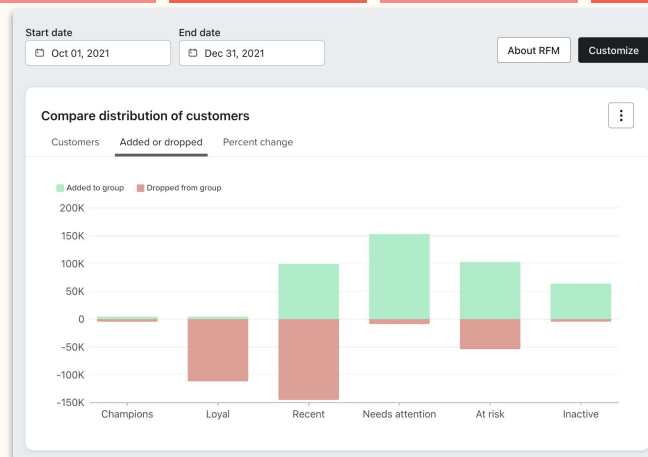
**Insight:** Analyzing the last two BFCMs, you see that your 2022 campaign moved a lot more of your audience to “Champions” compared to your 2021 campaign.

**Action:** Dig into flows and campaigns of 2022 to replicate messaging, offers, or imagery direction from communications that had the most engagement and conversion.

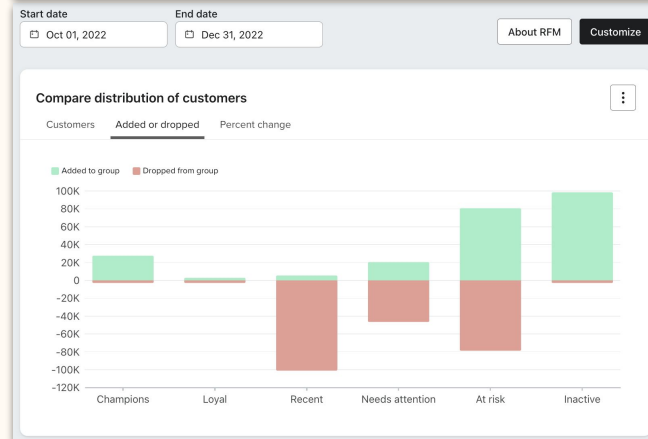
**Recommendation:** Duplicate your best performing template from last year; update with new product imagery.

**Metrics to track success:** Return on ad spend, Champion and Loyal segment growth

2021  
performance



2022  
performance



## Add cross-sell flows to promote key products to specific audiences

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** Over the last 6 months, Champions and Loyals are retaining, but Recent purchasers are most often falling into At Risk, and At Risk customers are then trending towards Inactive.

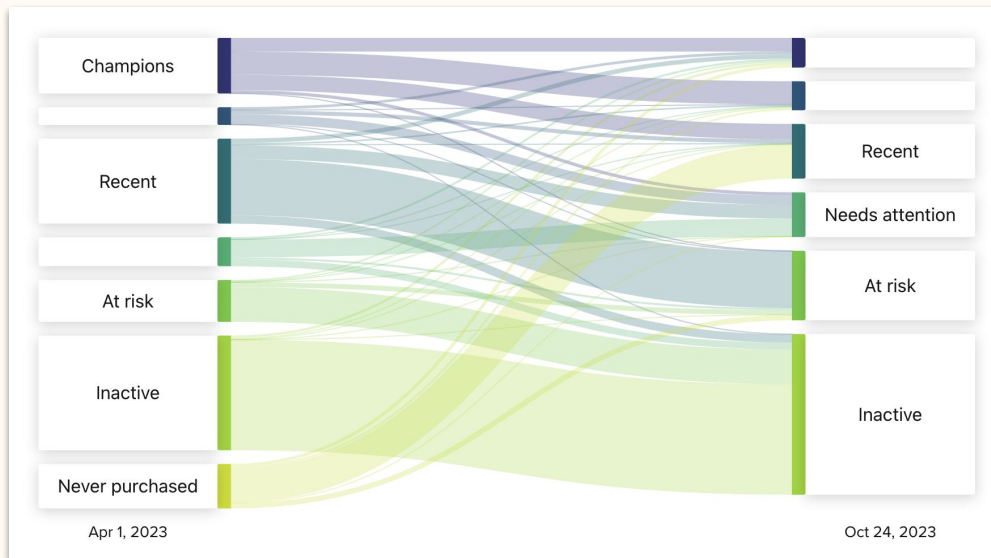
**Action:** Add cross-sell flows with conditional splits by RFM group

- Metric Trigger: Placed Order
- Add a filter based on specific product category
- Split based on “\$current\_month\_rfm\_group equals Champion” OR “\$current\_month\_rfm\_group equals Loyal”
  - For Champions and Loyals, follow up with a post-purchase Thank You email to nurture them
  - For others, follow up with a discount off their next order of the same category if they purchase within the next 7 days

### Recommendation:

- Trigger based on high value categories or products you have high inventory in (and are looking to sell!)
- Adjust date range of repeat purchase offer based on median performance chart

**Metrics to track success:** KAV, revenue per recipient, average products per order



## Expand your replenishment & winback flows

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** In your median performance table, you notice there's an opportunity to move customers from first-time to second-time purchasers.

**Action:** Set up a Repeat Purchase Funnel and filter by RFM segment to understand how repeat purchase behavior is differing by RFM group.

- Customize data ranges
- Filter by specific products or categories to understand how different items when purchased first lead to a subsequent purchase

**Recommendation:** Revisit replenishment or winback automations.

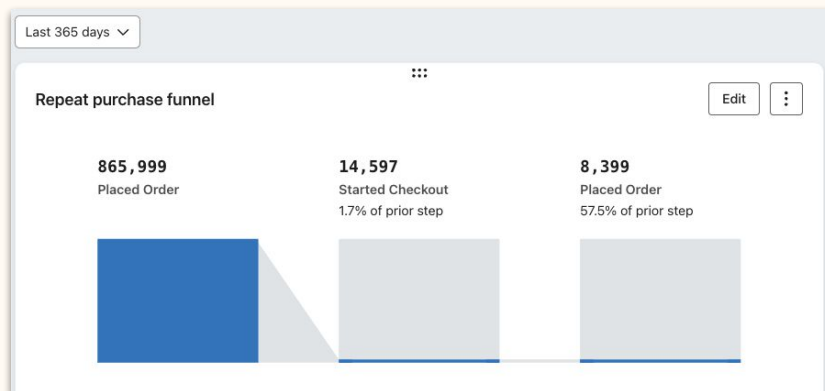
- **Expand your flows to reach multiple purchasers** – Add Splits based on how many historic orders someone has placed—as well as their current RFM group—to tailor content if needed.
- **Adjust automated email timing** – Change Time Delays to better reflect a more accurate repeat purchase cycle to reach customers when they're most likely to buy: Champions buy every 2–3 months, Loyal customers buy every 6 months, etc. Adjust the times you follow up to match when a customer is most likely to buy.
- **Try SMS! (if applicable)** – For customers who subscribe to SMS marketing, add a split to send an SMS to those that have clicked on an SMS message in the last 90 days.

**Metrics to track success:** KAV, revenue per recipient, repeat purchase rate

Median performance

Start date    End date

Group	Days since purchase	Number of placed orders	Placed order revenue
Champions	92	2	\$137.56
Loyal	279	3	\$178.89
Recent	112	1	\$53.45
Needs attention	641	2	\$111.68
At risk	318	1	\$42.80
Inactive	825	1	\$47.65



## Optimize your flows by segments

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** In your median performance table, you notice there's an opportunity to move customers from first-time to second-time purchasers.

**Action:** Create purchase funnel reports for each of your top flows – Browse Abandonment, Abandoned Cart, Winback, etc.

- Filter each funnel by RFM segment
- Customize date ranges

**Recommendation:** Customize your Abandoned Cart and Browse Abandonment Flows and alter discount offers or add additional messages for customer groups that experience outsized dropoff.

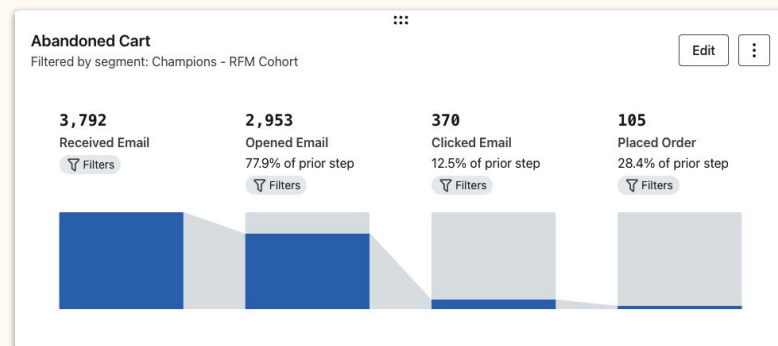
- For example, your Champions may not need an Abandoned Cart discount at all, but you may want to offer an outsized discount to At Risk or Needs Attention shoppers that abandon after browsing or initiating checkout since this may be your last chance to prevent churn!
- For example, your Inactive customers may represent a high # of recipients in your Browse Abandonment Flow, but only a small % of purchases attributed back to this automated series, yet their open rates are almost just as high. This presents an opportunity to tailor a block within these emails that will only show to current Inactives with an aim to reactivate.

**Metrics to track success:** KAV, revenue per recipient, repeat purchase rate

**Median performance**

Start date End date

Group	Days since purchase	Number of placed orders	Placed order revenue
Champions	92	2	\$137.56
Loyal	279	3	\$178.89
Recent	112	1	\$53.45
Needs attention	641	2	\$111.68
At risk	318	1	\$42.80
Inactive	825	1	\$47.65





## Personalize campaigns at scale

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** Over the last 6 months, Champions and Loyals are retaining, but Recent purchasers are most often falling into At Risk, and At Risk customers are then trending towards Inactive.

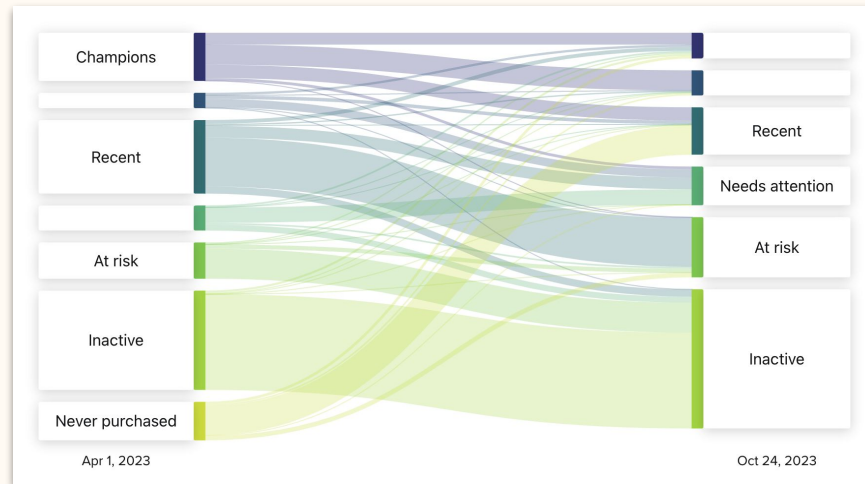
**Action:** Personalize content blocks in high impact campaigns

- When sending campaigns announcing a new product or special sale, consider using Klaviyo's Show/Hide block functionality to swap out content based on a recipient's current RFM group:
  - Add "VIP Offer" language for your Champions and Loyals
  - Add an increased incentive or a personalized product recommendation block, for Needs Attention and At Risk

**Recommendation:** Leverage these during big holiday sends (like BFCM) to maximize impact without needing to send multiple similar campaigns

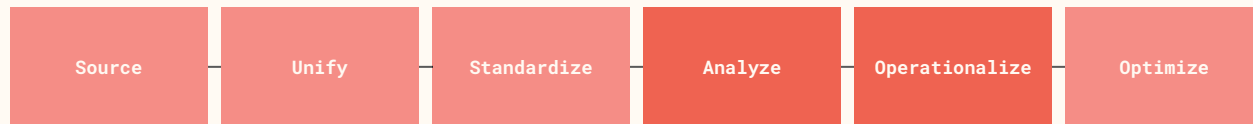
To show or hide a block based on someone's group membership, use this conditional statement: `person|lookup:'$current_month_rfm_group' == 'Champions'`

**Metrics to track success:** KAV,  
revenue per recipient, RFM  
segment growth/change



# WALK

## Refine your winback to reflect an accurate churn timeline



**Insight:** Over the last 6 months, Recent purchasers are most often falling into At Risk, and At Risk customers are then trending towards Inactive.

Looking at your median performance chart, your repeat buyers (Loyals and Champions) have all bought again within 2 months, while your At Risk customers have gone 208 days since their last purchase. This means Days 60 to 200 are important for preventing churn.

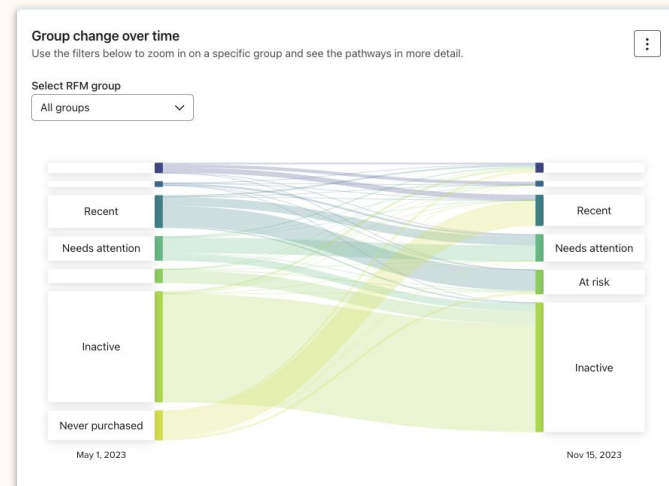
**Action:** Add a Winback Series that is timed specific to purchase behavior (or adjust an existing series)

- Create a Winback series that starts 60 days post-purchase and stretches out to 200 days post purchase.

### Recommendations:

- Use Conditional Splits based on what the customer last bought, to either nudge buying more or to cross-sell a different category.
- Consider offering a steeper discount around Day 150.

**Metrics to track success:** KAV, revenue per recipient, compare RFM before and after you made changes



Group	Days since purchase	Number of placed orders	Placed order revenue
Champions	11	9	\$770.15
Loyal	43	4	\$372.84
Recent	18	1	\$91.79
Needs attention	409	5	\$435.65
At risk	208	2	\$122.62
Inactive	519	1	\$65.24

RUN

## Personalize onsite to promote new store launch

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** “At risk” customers have increased in the last 60 days.

**Action:** Use Group membership API to personalize onsite offers based on location – target at-risk customers near your Boston location with a personalized banner to come in store for 25% off.

- Create RFM segment “At Risk” and City equals Boston
- Create a personalized banner with an offer to show when this segment comes to your website

**Recommendation:** Send a one-time email or SMS campaign to Boston customers to drive traffic to your site and encourage customers to engage with you in-person for a different experience which they may prefer over online shopping.

**Metrics to track success:** In-store purchases, time on site, banner click rate, bounce rate

Name

Boston area customers at risk

Definition

Properties about someone

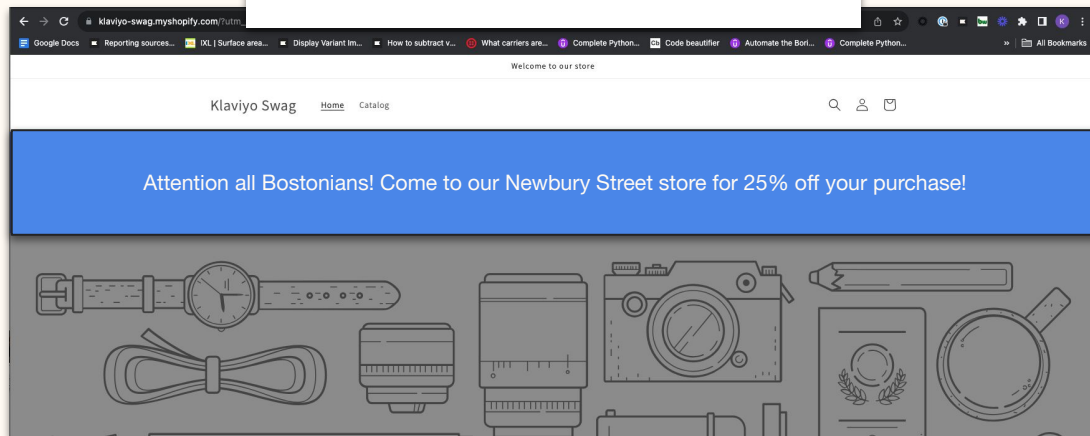
City equals Boston

+ AND

Properties about someone

\$current\_month\_rfm\_group equals At risk

+ AND



## Level-up your winback flows

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** You're seeing a drop-off from first to second purchasers.

**Action:** Customize your CLV window to your churn cycle and add a Conditional Split to your winback flow that branches based on predicted number of orders — offering bigger incentives to customers likely to churn.

- Go to Custom CLV and set your window
- Go to your existing winback flow (if not existing, create one!)
- Add a conditional split right after the trigger that branches based on Predicted number of orders — this # would be interpreted as “once someone enters the flow, how many orders are they predicted to place within the custom CLV window that you defined”
  - If it is at least 1, they should receive the original branch
  - But if it is predicted to be 0, you can proactively branch those people out and offer them a bigger incentive than everyone else is getting because you know they're likely to churn within your custom window

**Recommendation:** Use conditional content blocks in the same campaign to maximize efficiency and show personalized offers and/or products to specific “At risk” audiences.

**Metrics to track success:** KAV, revenue per recipient, average products per order

### CONFIGURATION

Create a distinct split in your flow based on recipient properties or behavior. [Learn more.](#)

People that meet the following condition(s) will move to the YES side of this split:

Predictive analytics about someone ▾

Predicted Number Of Orders ▾

is at least ▾

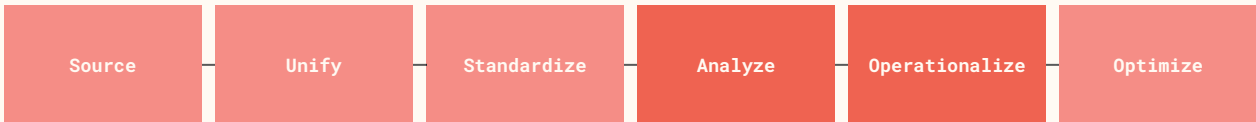
value

OR

✕

+ AND

## Identify and prevent churn 2.0



**Insight:** You identify that your customers most often become Inactive after 200 days of no purchases.

**Action:** Use customized CLV window to identify customers at risk for churn, send a personalized email or SMS campaign to incentivize a timely purchase

- Change the prediction window to 200 days
- Build a segment based on customers who have a high-value predicted CLV and haven't purchased in the last 100 days

**Recommendation:** Personalize the onsite experience for these customers so when they click your email/SMS, they see the same offer.

**Metrics to track success:** KAV, revenue per recipient, time on page, conversion rate, bounce/exit rate

**Predicted date range**  
 Updating your prediction window will affect assets that use Predicted CLV, Total CLV, or Predicted Number of Orders.

200 days

**Historic date range**  
 All time (2,081 days)

**Prediction confidence** ✔ Highest

Save Preview ?

Name  
 High value customers who haven't purchased in 100 days

Definition

Predictive analytics about someone

Predicted Customer Lifetime Value is at least 500

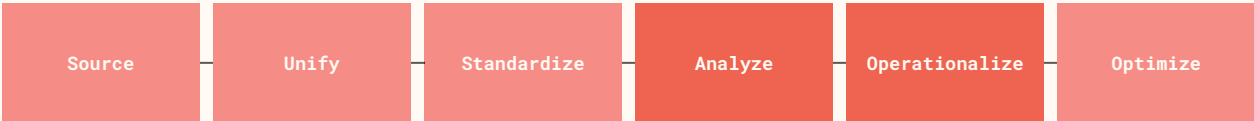
+ AND

What someone has done (or not done)

Has 📍 Placed O... at least once in the last 100 days

Add Filter

# Automate direct mail campaigns to customers before they churn



**Insight:** Your “Needs attention” cohort has increased this quarter after many email and SMS campaigns.

**Action:** Send a direct mail campaign to customers who are “Needs attention” and haven’t opened email or SMS in 60-days.

- Create an RFM segment of customers who are “Needs attention” and haven’t engaged with email or SMS in the last 90 days
- Add this segment to an existing win back or re-engagement flow that leverages direct mail or
  - If none exist, create a new flow that is triggered by a customer joining the segment
- Send a webhook in a flow to trigger an outbound notification to send a direct mailer to this customer

**Recommendation:** Include a time-expiring incentive with a unique code from their mailer.

Name: Needs attention and unengaged

Definition

Properties about someone

\$current\_month\_rfm\_group equals Needs attention Type: Text

+ AND

What someone has done (or not done)

Has  Clicked Email zero times in the last 90 days

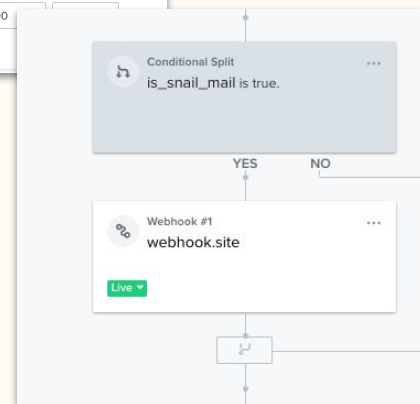
+ Add Filter

OR

What someone has done (or not done)

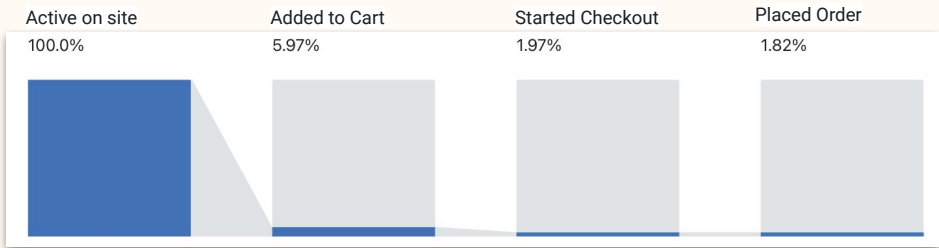
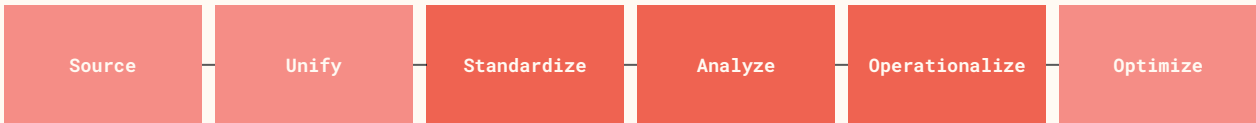
Has  Clicked SMS zero times in the last 90 days

+ Add Filter



**Metrics to track success:** Direct mail performance, Needs attention segment change

## Personalize your web experience to address drop-off



**Insight:** You run a web-to-purchase funnel analysis and filter by gender and see a high drop-off for women early in the funnel.

**Action:** Use the Group membership API to change the navigation bar so that women’s links are listed first if the visitor is likely female.

- Create segments of customers by predicted gender
- Customize the navigation bar and copy to reflect a personalized experience for visitors in the “woman” segment

**Recommendation:** Standardize the profile property value of *gender* to ensure you are capturing all inputs of woman (e.g. women, female, F).

**Metrics to track success:** Funnel completion, time on page, conversion rate, bounce/exit rate

New profile property name  
This profile property will be saved under a new name, with the transformed values.

gender\_\_transformed

---

Set rules for standardizing data

If value: Contains Text

Match which value: female

Replace with: Text Woman

If value: Contains Text

Match which value: Women

Replace with: Text Woman

If value: Contains Text

Match which value: F

Replace with: Text Woman

+ Add Rule

Name: All women

---

Definition

Properties about someone

gender\_\_transformed equals Woman

# Increase return on ad spend



## CRAWL

# Create lookalikes of your best RFM customers who are engaged

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Action:** Create segments of your Loyal and Champion customers, letting our model find these groups you can then send to Facebook, Instagram, and Google to form lookalike audiences.

### Recommendations:

- Combine RFM groups with recent purchase, channel engagement, or web browsing behavior
- Combine RFM groups with demographic data to create hyper-targeted audiences of specific age, gender, location, etc.

**Metrics to track success:** Return on ad spend (\$ per conversion, \$ per subscriber), # of subscribers, # of new purchasers

Name

RFM Champions or Loyal who recently browsed

Definition

Properties about someone

\$current\_month\_rfm\_group equals Champions Type: Text

OR

Properties about someone

\$current\_month\_rfm\_group equals Loyal Type: Text

+ AND

What someone has done (or not done)

Has  Active on Site at least once in the last 90 days

Add Filter

## Exclude recent buyers that aren't likely to buy again

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** You recently ran a successful campaign towards At Risk and Needs Attention customers.

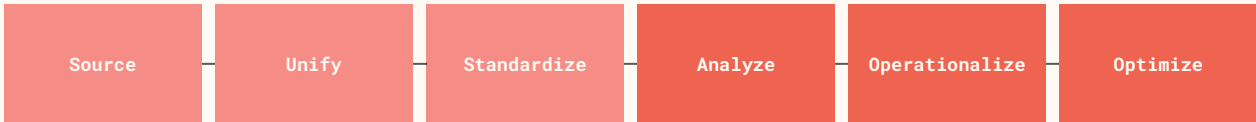
**Action:** Exclude this audience from your weekly advertising campaigns, so you aren't spending ad dollars on an audience that just purchased (and isn't likely to again immediately).

### Recommendations:

- Use the median performance chart in RFM analysis to roughly identify when each group is likely to purchase again

**Metrics to track success:** Return on ad spend

# Optimize your lead conversion from social channels



**Insight:** Your return on ad spend with Facebook has dipped over the last few months.

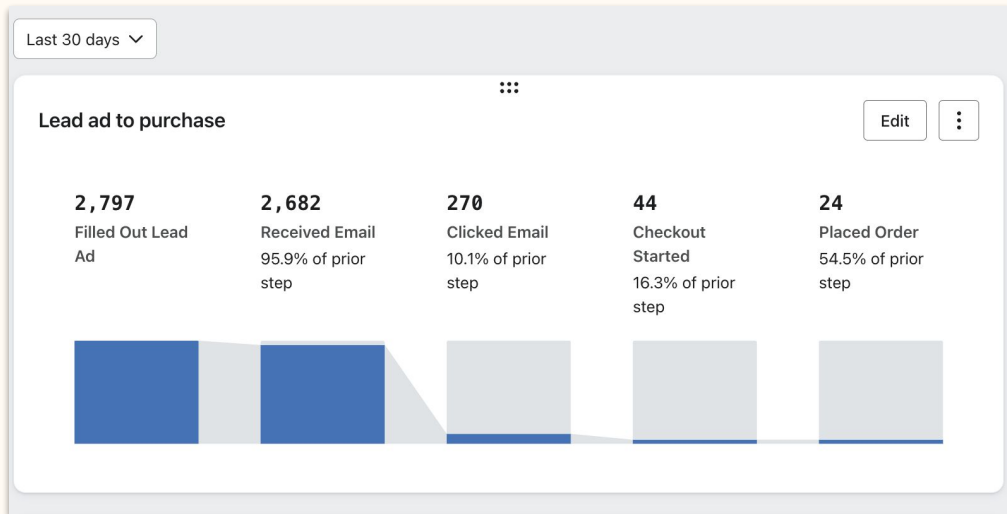
**Action:** Create a Lead Ad to Purchase funnel to identify areas of drop off and optimization.

- If lead ad subscribers aren't engaging with your email, try new messaging or an offer that incentivizes them to move through the funnel
- If lead ad subscribers are dropping once they hit your website, try directing them to a specific product page to limit clicks and distraction.
- If lead ad subscribers drop at checkout, try optimizing your checkout experience (e.g. one-page checkout)

## Recommendations:

- Filter this by segments to see how different segments move through the funnel

**Metrics to track success:** Revenue from lead ad subscribers, conversion rate



# Acquire more customers

## Create lookalikes of your top RFM customers

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Action:** Create segments of your Loyal and Champion customers, letting our model find these groups you can then send to Facebook, Instagram, and Google to form lookalike audiences.

### Recommendations:

- Combine RFM groups with recent purchase, channel engagement, or web browsing behavior
- Combine RFM groups with demographic data to create hyper-targeted audiences of specific age, gender, location, etc.

**Metrics to track success:** Return on ad spend, # of subscribers, # of new purchasers

#### Name

RFM champions

#### Definition

Properties about someone

\$current\_month\_rfm\_group

equals

Champions

+ AND

Create more  
omnichannel  
experiences

## Personalize your site using Loyalty program data

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Action:** Personalize content on your website based on loyalty program status

- Hero image promotes loyalty program to non-members
- Welcome Back message to members

### Recommendations:

- Create a segment of all loyalty customers
- Create segments on each loyalty tier if you'd like to personalize based on tier

**Metrics to track success:** # Loyalty subscribers, time on page, conversion rate, bounce/exit rate

#### Name

Loyalty Members

#### Definition

Properties about someone

swell\_has\_account

is true

+ AND

## Customize copy on your site to drive retention

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Action:** Write Personalized birthday message to incentivize up-sell (and mirror your birthday email/SMS flow!)

- Change copy on your homepage to write a happy belated birthday message to visitors whose birthday was in the last 30 days; offer a buy 2 items get 1 free discount code

### Recommendations:

- Create a segment of customers who had a recent birthday
- Launch a birthday flow with email and SMS with the same message to provide a holistic experience at every touchpoint!

**Metrics to track success:** Discount usage, segment performance, time on page, conversion rate, bounce/exit rate

**Name**

Recent birthday

---

**Definition**

Properties about someone

Birthday is in the last 30 days

+ AND



## Don't offer first-time discounts to repeat purchasers

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Action:** Personalize homepage experience based on purchase history and only offer first-time discounts to first-time buyers.

- Non-purchasers see a banner with a first-time buyer discount code,
- Show previous purchasers a “welcome back!” banner

### Recommendations:

- Keep messaging consistent with emails/SMS to ensure a positive holistic brand experience


**Metrics to track success:** \$ saved on discount usage, time on page, conversion rate, bounce/exit rate

Name

Past Purchasers

Definition

What someone has done (or not done)

Has  Placed O... at least once over all time

## Control where you drive customers to more effectively

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Action:** Personalize website based on customer preference or demographic

- Show personalized categories, blogs, and content based
- Show personalized navigation based on gender

### Recommendations:

- Personalize based on demographic data, product purchase behavior, what campaigns someone has been, or their predicted LTV


**Metrics to track success:** Time on page, conversion rate, bounce/exit rate

Name

Customers who color their hair

Definition

What someone has done (or not done)

Has  Placed Order at least once over all time

where Collections contains Color Care X

# Engage with unengaged audiences

## Retarget churn risk customers who aren't engaging with email/SMS

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** At Risk and Inactive customers aren't responding to your emails or SMS messages

**Action:** Retarget At Risk and Inactive segments on Facebook/Instagram/Google to reach them on a new channel they might respond better to

### Recommendations:

- Promote a different, more incentivizing offer than you have in your emails or SMS messages (higher discount, free item, etc.)

**Metrics to track success:** Ad performance, At Risk and Inactive segment growth

Name

RFM At Risk and Needs Attention who aren't engaging with email

Definition

Properties about someone

\$current\_month\_rfm\_group equals At risk Type: Text

OR

Properties about someone

\$current\_month\_rfm\_group equals Inactive Type: Text

+ AND

What someone has done (or not done)

Has  Received Email at least once in the last 90 days

Add Filter

OR

Select a condition...

+ AND

What someone has done (or not done)

Has  Clicked Email zero times in the last 90 days

Add Filter

## Retarget unsubscribed audiences at risk of churn

Source

Unify

Standardize

Analyze

Operationalize

Optimize

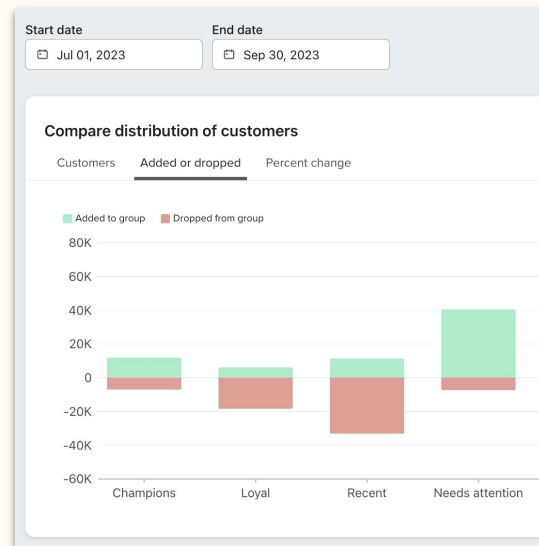
**Insight:** Your last quarter of email and SMS campaigns resulted in many customers unsubscribing and moving to Needs attention.

**Action:** Retarget Needs attention audience on Meta or Google Ads.

- Create RFM segment of Needs attention
- Send audience to Facebook, Instagram, and/or Google Ads to retarget effectively

**Recommendation:** Offer a time-expiring promotion with a sizable discount since these customers aren't receiving your email or SMS offer!

**Metrics to track success:** Ad performance, At Risk and Inactive segment growth



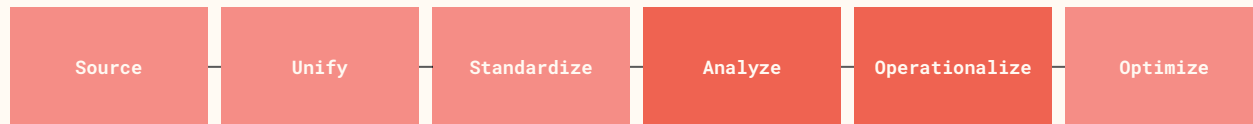
Name: RFM Needs Attention

Definition:

Properties about someone

\$current\_month\_rfm\_group equals Needs attention

# Retarget unsubscribed audiences & personalize onsite



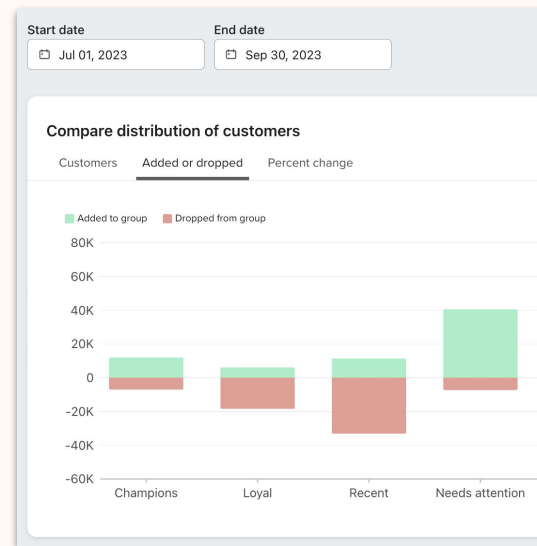
**Insight:** Your last quarter of email and SMS campaigns resulted in many customers unsubscribing and moving to Needs attention.

**Action:** Retarget Needs attention audience on Meta or Google Ads and then personalize your onsite experience to reflect a consistent experience.

- Create RFM segment of Needs attention
- Send audience to Facebook, Instagram, and/or Google Ads to retarget effectively
- Customize your homepage to reflect the same offer to drive conversion.

**Recommendation:** Keep your offer consistent with your offer on Meta or Google!

**Metrics to track success:** Ad performance, At Risk and Inactive segment growth



Name: RFM Needs Attention

Definition: Properties about someone

\$current\_month\_rfm\_group equals Needs attention

# Increase customer lifetime value

## Get granular with CLV and target more effectively

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** Many customers often repurchase beyond a year of purchase

**Action:** Change your CLV prediction window to reflect a more realistic buying cycle — 2 years. Add a flow using expected date of next order.

### Recommendations:


- Configure a date-based flow that uses a profile's expected date of next order.
- You can set parameters around how far in advance of the date you'd like the flow to start.
  - Start the flow at least 2 days before the expected order date. This allows you to proactively prompt customers to restock or make a purchase when they are primed to buy.


**Metrics to track success:** KAV, revenue per recipient, revenue from flow


**Predicted date range**  
Updating your prediction window will affect assets that use Predicted CLV, Total CLV, or Predicted Number of Orders.

730 days

**Historic date range**  
All time (2,095 days)

**Prediction confidence**  ✔ Highest

 **Trigger**

 **Date property** Edit  
Flow trigger

Date property  
Expected Date Of Next Order

Start time  
On date property  
12:00 PM local time



## Get granular with CLV and better target churn risk customers

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** You identify that three years is the point at which unengaged customers churn

### Actions:

- Change your CLV prediction window to reflect a more realistic churn cycle — three years.
- Build a segment of customers who haven't purchased in 1,000 days but have a predicted LTV >\$100
- Add a flow to send a last-ditch offer whenever someone joins this segment

### Recommendations:

- Offer a big incentive to ensure these customers don't churn!

**Name**

Customers likely to churn -- last-ditch effort

**Definition**

What someone has done (or not done)

Has Placed Order zero times in the last 1,000 days

**+ AND**

Predictive analytics about someone

Predicted Customer Lifetime Value is at least 100

**Metrics to track success:** KAV, revenue per recipient, revenue from flow, segment revenue, repeat purchase rate

## Maximize CLV of your best customers

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Action:** Run campaigns to target Champion or Loyal customers effectively

### Recommendations:

- Text-based emails from the founder / CEO to keep a personal connection
- Send them surveys for feedback, invite them to personal meet-ups or exclusive events
- Target for mobile app download (if you have a mobile app)
- Offer buy-on-get-one-free, or strategic cross-sell opportunities on higher value products
- Opportunities to give feedback on new products
- If you have subscription options, target this group to subscribe and save

**Metrics to track success:** KAV, revenue per recipient,  
revenue per segment

## Optimize your web experience to enhance conversions

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** Your funnels show you that you can optimize your pre-purchase experience to enhance conversion

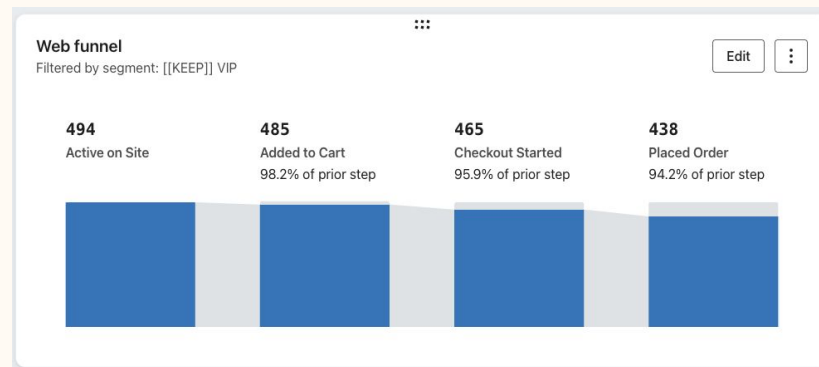
**Action:** Test changes to areas of drop-off to see impact on conversion.

- Optimize pre-checkout experience
  - Enable an “add-to-cart” option directly from catalog pages.
- Optimize checkout experience
  - Try one-page checkout
  - Run a personalized message to VIP customers using Group membership API
  - Enable technology that helps speed up and simplify the checkout process, like Buy with Prime or ShopPay
  - Try offering a new shipping option

### Recommendations:

- Filter by segment to see how different customers move through the journey

**Metrics to track success:** Conversion rates, bounce rates, added-to-cart rates



## Run A/B tests to identify what offer works best

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** You identify your lowest revenue segments using audience performance

**Action:** A/B test different offers in an upcoming campaign to see what they respond to best

- Send the A/B test to your lowest performing segments and observe the revenue results.
- In your A/B test settings, set the *winning metric* to Placed order rate.

### Recommendations:

- Repurpose the winning offer across future campaigns to scale your learnings!
- Use *show/hide* functionality to maximize efficiency!

Campaign A/B test Switch to testing send times

> **A** A/B test for low-revenue reactivation | Win \$500  
 Subject: Your next order could get you \$500  
 From: Klaviyo Swag <hello@klaviyo-demo.com>

> **B** A/B test for low-revenue reactivation | \$50 off next purchase  
 Subject: Here's \$50 off your next order, Jenn  
 From: Klaviyo Swag <hello@klaviyo-demo.com>

---

**Content test settings** AI-powered

**Winning metric**

Open rate  
The variation with the highest open rate wins

Click rate  
The variation with the highest click rate wins

Placed order rate  
The variation with the highest placed order rate wins

**Metrics to track success:** Revenue per recipient, revenue from each segment, campaign revenue, A/B test results, time saved (qualitative!)

# Enhance data consistency and hygiene

## Standardize country / city property values to build better audiences

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** You notice you have multiple, duplicate values for USA and Los Angeles, and as a result, are missing people in segmentation.

**Action:** Standardize values by creating rules in transformation

### Recommendations:

- Create segments using your new properties and star them
- Adjust any flow filters

**Metrics to track success:** # of users per segment, time saved (qualitative!)

Definition

Properties about someone

Country equals uni

+ AND

- United Arab Emirates
- United Kingdom
- United States
- United States of America

Definition

Properties about someone

City equals los

+ AND

- Los Altos
- Los Angeles
- LOS ANGELES
- los angeles
- Los Gatos
- los gatos
- Palos Verdes Peninsula
- San Carlos

## Reformat user generated / custom profile properties to use in personalization

Source

Unify

Standardize

Analyze

Operationalize

Optimize

**Insight:** You have a quiz on your website to identify a visitor's skin type in order to recommend skincare products to them effectively.

However, the custom quiz was inputting brackets with each response, so the custom properties can't be used in personalization without brackets populating for each message.

**Action:** Reformat values by at scale in transformation

### Recommendations:

- Create segments using your new properties and star them
- Adjust any flow filters

**Metrics to track success:** # of users per segment, time saved (qualitative!)

Quiz:  
**Know Your Skin Type**  
The first step to building a routine is understanding your skin

Get Started

← All profiles

Thomas Jefferson

thomas.jefferson@klaviyo.com · Ashburn, Virginia, United States

Details

Metrics and insights

Lists and segments

Key	Value	
\$city__transformed	Ashburn	⋮
Favorite Colors	["yellow","blue"]	⋮
FavoriteColor	yellow	⋮
FavoriteColor__transformed	yellow	⋮
highest_order_value	1000	⋮
skin_type	['combination']	⋮
skin_type__transformed	combination	⋮

# APPENDIX

Additional use cases to add



# Parking lot

- Data syncing
  - Historical data analysis in DW – Run attribution, surface custom insights, run analysis on existing historical data to get a basis for new projects and experiments brands want to run in the future in Klaviyo.
  - Data mining for AI/ML – Run AI/ML models in DQ
  - Data visualization with connectors to BI tools like Tableau, Looker, etc. – Report on/visualize Klaviyo data without having to log in, and ability to do this in a centralized place for multiple data sources beyond Klaviyo
  - Backup of all historical data – To consolidate data from various sources. Some customers see Klaviyo not as just a single source of data, because they may have many integrations feeding data into Klaviyo, so being able to export all data from Klaviyo means they have data from multiple sources all cleanly mapped with standardized identifiers and format.
  - Send profile data from Klaviyo to data warehouse – Combine Klaviyo data with data from other platforms to be able to get a full 360-view of customer in data warehouse for use across org
  - Send event data from Klaviyo to data warehouse – Identify patterns and trends based on lifetime customer behavior
  - Send campaign and flow data to warehouse – Combine Klaviyo engagement & behavioral data with data from other platforms (i.e. advertising data) to get a robust view of customer behavior and engagement with brand
- Webhooks
  - Sync when a customer unsubscribes from email to other systems – Send unsubscribe data to other systems (i.e. marketing platforms) so that the customer is not on any email distribution list.
  - Sync channel engagement data (i.e. opens, clicks) to analytics tools or other systems of insight – Send engagement data to other systems (analytics tool) to be able to enhance customer analysis

# Putting it all together

Personalized cross-sell flow to loyal customers when they become at-risk

## Strategic Value:

Maximize conversion rates and increase repeat purchase rate with a formerly engaged audience, part of your loyalty program, who currently don't have a support ticket open

### Data Ingestion



BigCommerce purchase



LoyaltyLion gold tier



Klaviyo signup form quiz - favorite color



Gorgias help desk - open ticket

### Unification & Transformation

Data unified under **360-view single customer profiles** through **deterministic merging**

Favorite color was collected as "Rod" → fixed to "Red"

### Segmentation / Automation

#### Segment:

Current RFM group = At-risk

Loyalty Tier = Gold

Favorite color = red

#### Flow:

**Trigger:** When someone joins above segment

Open support ticket = false

#### Conditional Splits:

Subscribed to SMS = true

### Marketing



#### Email

Include red products and banner with spend to next tier



#### SMS

Send text message to those subscribed to SMS with an in-store offer



#### Paid Media

Retarget audience with personalized ad



#### Group Membership API

Tailor the onsite experience for with customized banner or product recommendation

### Analytics

#### RFM Analysis

Identify at-risk customers and see change

#### Funnel Analysis

Use events from LoyaltyLion in funnel analysis to analyze when people join loyalty tiers

#### Audience Performance

Compare change of segments, value of the loyalty segments, value of loyalty segments by channel.

#### Data Warehouse

Pair the loyalty data with other data to gain insights and identify how shopping trends and loyalty correspond



Insights

# Enabling CDP

”

It's nice that you don't have to do  
anything [to set it up] – it just works.

/

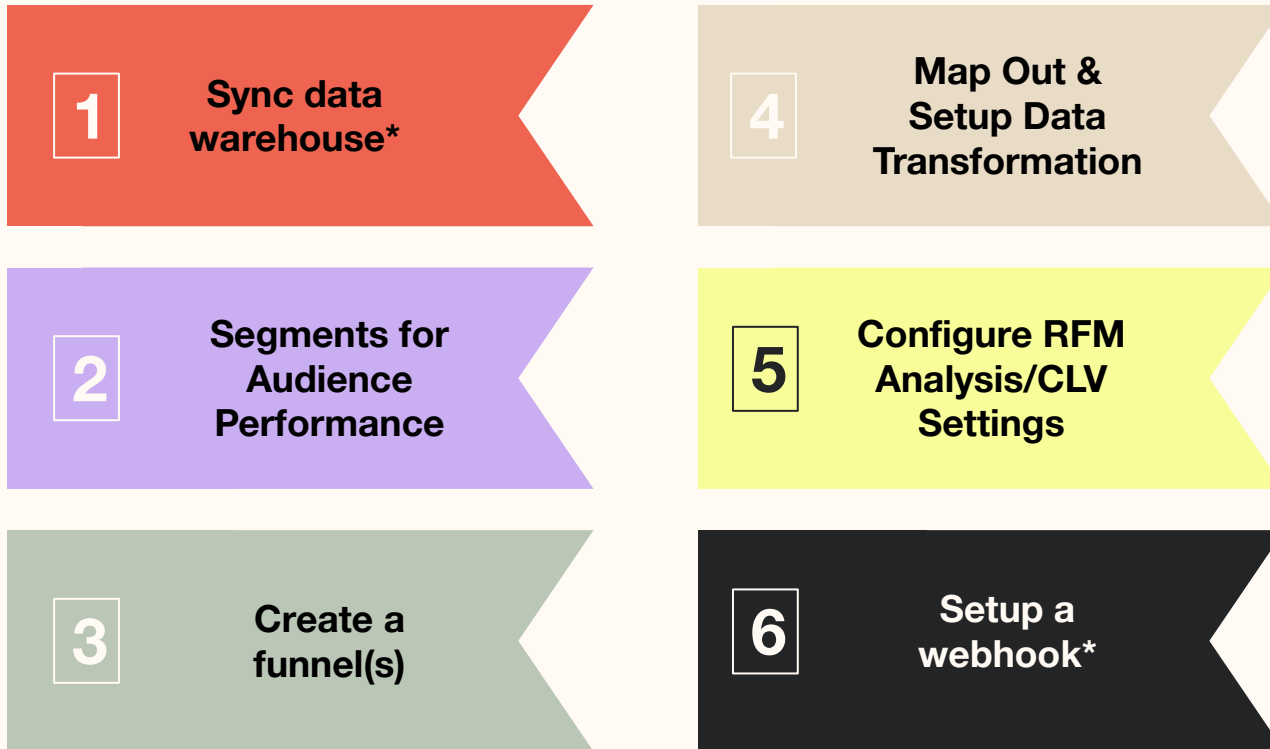
MIKKEL LUND PALLESEN, HEAD OF B2C MARKETING  
NEGLEFEBER

*neglefeber*

Klaviyo CDP features can be enabled in  
a few clicks



# What do customers NEED to complete to be setup for success with Klaviyo CDP?



*\*If applicable to the account*

## Web Personalization with Group Membership API

*Due to the development required, this step should be a suggestion to accounts to follow the [documentation](#) and involve their developer team if they choose to utilize this*

### Prerequisite

- Brand has a recommendation engine or CMS (Nosto, Dynamic Yield, etc) to serve content
- Install Klaviyo JavaScript SDK

### How to Set Up (requires developer support)

1. Within their code, get a list of segment IDs to check segment membership for
2. Query `getGroupMembership` function with segment IDs
3. API returns segment membership results
4. Pass segment information to recommendation engine to serve personalized content

### ***How does this add value?***

Enable personalized experiences on the website with relevant product recommendations, dynamic promotions or content

# Data Warehouse\*

## 1 Setup data warehouse as a data destination

- **Amazon Redshift**
- **Google BigQuery:** account must have a payment profile
- **Snowflake:** requires *securityadmin* and *sysadmin* privileges

## 2 Provide credentials

Amazon Redshift	Google BigQuery	Snowflake
<ul style="list-style-type: none"><li>● Name</li><li>● Host URL</li><li>● Database</li><li>● Schema</li><li>● Username</li><li>● Password</li></ul>	<ul style="list-style-type: none"><li>● Name</li><li>● Project ID</li><li>● Data set</li><li>● Private key</li></ul>	<ul style="list-style-type: none"><li>● Host URL</li><li>● Port</li><li>● Database name</li><li>● Schema name</li><li>● Username</li><li>● Database password</li><li>● Account</li></ul>

**Note:** While this is an important step to callout, customers should self-guide through the setup process with [documentation](#). Any technical issues should go to SA or Support.

*If the sync was successful, you'll start seeing a status and next scheduled sync:*

The screenshot shows the 'Google BigQuery Syncs' interface. At the top, it indicates 'Data syncing' and 'Google BigQuery Syncs'. Below this, there are tabs for 'Historical' and 'Periodic'. The main status is 'Healthy' with a '25 min' data freshness and '0' errors. A table lists two syncs, both with a 'Scheduled' status and 'Next run' times. Each sync has a 'Pause' button. The interface also includes a 'View' dropdown set to 'All statuses' and navigation arrows for 'Prev' and 'Next'.

Name	Status	Data freshness	Error(s)	View
google-bigquery-event-export (since: '2023-08-08T14:47:57.882632+00:00')	Scheduled Next run: 34 min	25 min Target: 60 min		Pause
google-bigquery-customer-export (since: '2023-08-08T14:47:57.882632+00:00')	Scheduled Next run: 36 min	24 min Target: 60 min		Pause



# Audience Performance Summary

In order to see audience performance, accounts need to star the segments they want to evaluate.

Intelligence

Funnel analysis RFM analysis Audience performance Custom CLV

### Audience performance

Track the performance of your starred segments by channel. Last updated 7 minutes ago

#### Starred segments

Placed Order Last 30 days

Segment	Members	Size change	Email revenue	SMS revenue	Total revenue
[[KEEP]] HAS 5 STAR REVIEW Created March 24th, 2023	5,475	1,199	\$646,442.75	\$8,346.40	\$654,789.15
[[KEEP]] SMS Campaign Segment 1 Created September 9th, 2022	7,990	7,674	\$81,649.88	\$66,913.23	\$148,563.11
[[KEEP]] SMS Campaign Segment 2 Created October 14th, 2022	372	-7,411	\$93,158.38	\$181,260.62	\$274,419.00
[[KEEP]]: DAILY NEWSLETTER SEGMENT (SES) Created June 21st, 2022	50,679	-67	\$1,332,060.55	\$150,177.68	\$1,482,238.23

< Prev 1 Next > 25 per page

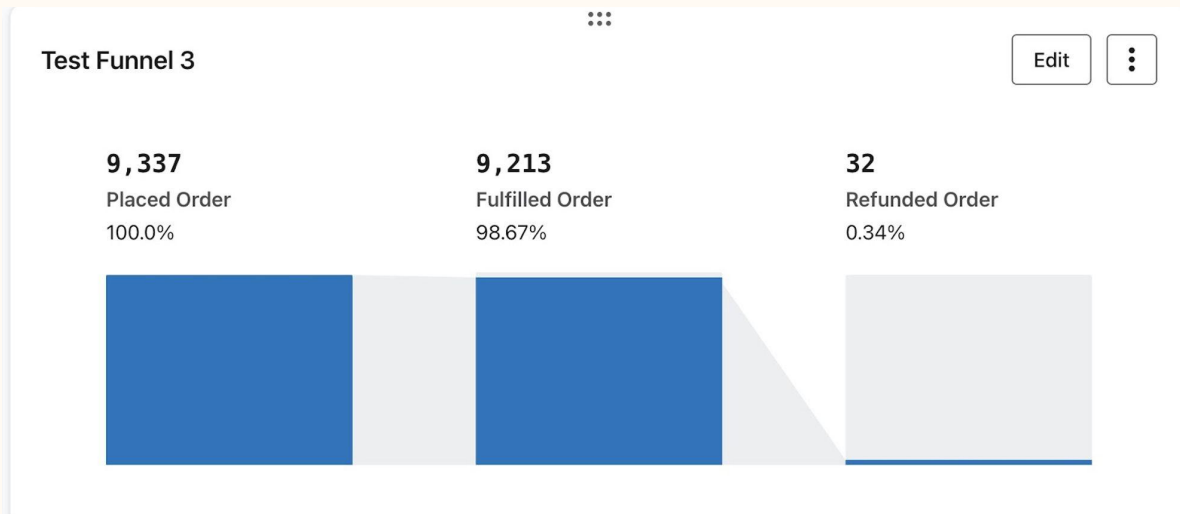
*What value does this unlock?*

Customers can now compare which segments are performing well and which ones need further optimization.

## Funnel Analysis

### How-to:

- Click “Create funnel”
- Choose metric per step
- *Optional: Filter by segment*
- View by time frame



### What value does this bring?

Funnel analysis reporting provides the ability to **review a customer's journey** with your brand and where they may potentially drop off before an action or conversion.

Knowing more about where a customer may drop off is helpful for brands to **identify areas of opportunity** for optimizing their marketing funnel.

## ***Recommendations & examples of funnels to create***

*Things to consider: What channels do they use? What conversions are they looking for? Do they track onsite activity (viewed product/added to cart)?*

### **Web to purchase (Email)**

- Viewed Product
- Added to Cart/Started Checkout
- Placed Order

### **Email Performance Funnel**

- Received Email
- Opened Email
- Clicked Email
- Placed Order

### **Welcome series to first purchase (SMS)**

- Subscribed to List
- Received SMS
- Clicked SMS
- Added to cart/Started checkout
- Placed Order

## Data Transformation

# Brands can easily transform profile properties

Profile property	New profile property name	Transformation method	Status	Last edited	
\$country	\$country__transformed	Format	Active	18 hours ago 4:16 PM EDT	
\$first_name	\$first_name__transformed	Format	Active	24 hours ago 10:34 AM EDT	

### How does this add value?

Data consistency saves time and improves personalization

1

#### Select a profile property to transform

Profile property

\$country

Transformation method

This profile property can only be formatted and standardized once.

Format

New profile property name

This profile property will be saved under a new name, with the transformed values.

\$country\_\_transformed

2

#### Select formatting rules

Rules will be applied in this order: deleted space, deleted quotation marks, deleted special characters, and then capitalized words.

Formatting rules

Remove quotes

Quotes at the beginning and end of values will be deleted.

Remove spaces

Spaces at the beginning and end of values will be deleted.

Remove special characters

Only letters and numbers will be kept.

Capitalize the first letter of every word

The first letter of every value will be capitalized.

- *Property must already exist in the account*
- *Limit of 30 active transformations per account*

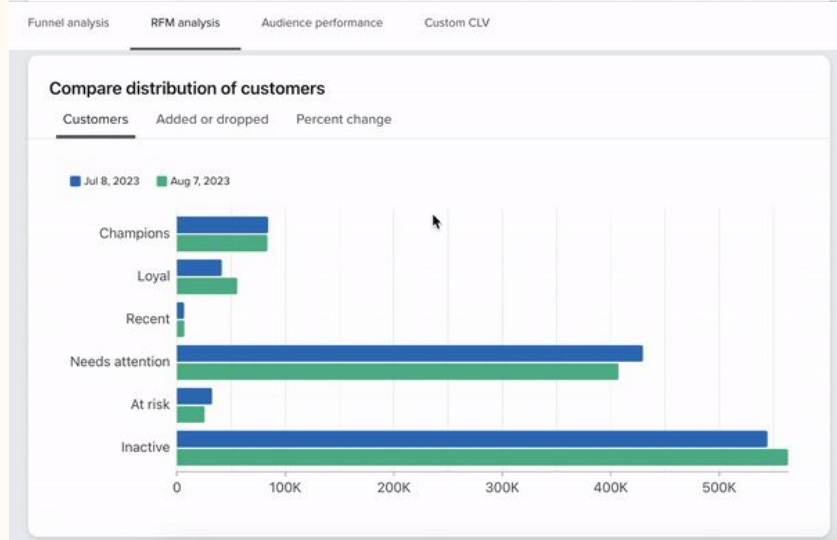
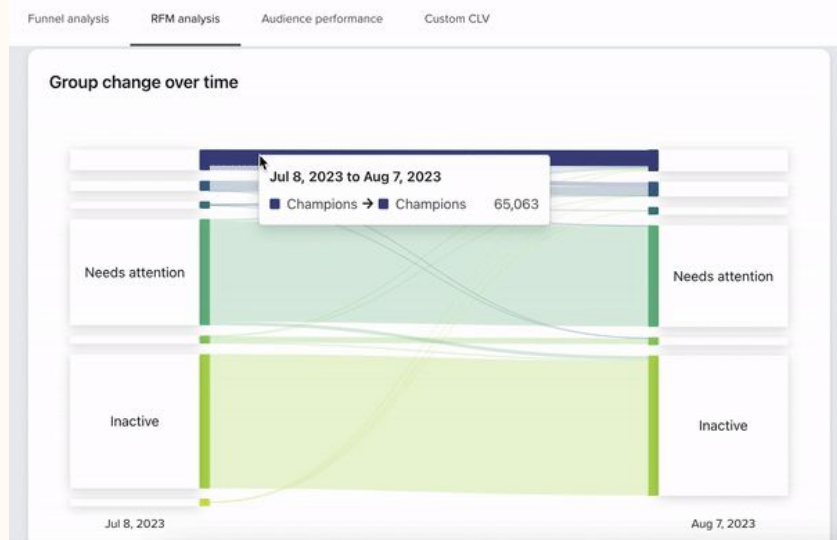
# RFM Analysis

Intelligence > RFM Analysis > Settings

By default, the RFM report will use:

- Most frequently used Placed order statistic in the account
- Start date as 30 days prior to the current day and the end date as the current day
- Automatically determines the RFM scores using thresholds unique to the account.

If needed, adjust these items to tailor the report to fit their specific RFM-tracking needs.



# Custom CLV

## Intelligence > Custom CLV > Settings

*\*\*Segments must include CLV attributes to appear in the table*

If the metrics need to be adjusted, you can submit a support ticket or [follow this guide](#) to adjust the account settings.

The screenshot shows the 'Intelligence' dashboard with 'Custom CLV' selected. It includes a 'Settings' modal window. The 'Current model' section shows a historic date range of 'All time (2,670 days)' and a predicted date range of 'Next 365 days'. The 'Segments using CLV' table lists three segments: 'Churn Risk - Highly at Risk', 'Churn Risk - At Risk', and 'Churn Risk - Cooling', each with associated metrics and CLV attributes.

Segment name	Total pr...	Last updated	CLV attributes
Churn Risk - Highly at Risk	560,224	Jun 12, 2023	Churn Risk Prediction
Churn Risk - At Risk	264,801	Jun 12, 2023	Churn Risk Prediction
Churn Risk - Cooling	25,268	Jun 12, 2023	Churn Risk Prediction

**Settings**

### How is CLV calculated?

A prediction of how much a customer will spend during the predicted date range based on what they've purchased in the past. This value is based on placed orders, refunded orders, and cancelled orders.

Your equivalent account metrics:

- Placed Order
- Refunded Order
- Cancelled Order

To change these account metrics please reach out to [customer support](#).

## Webhooks\*

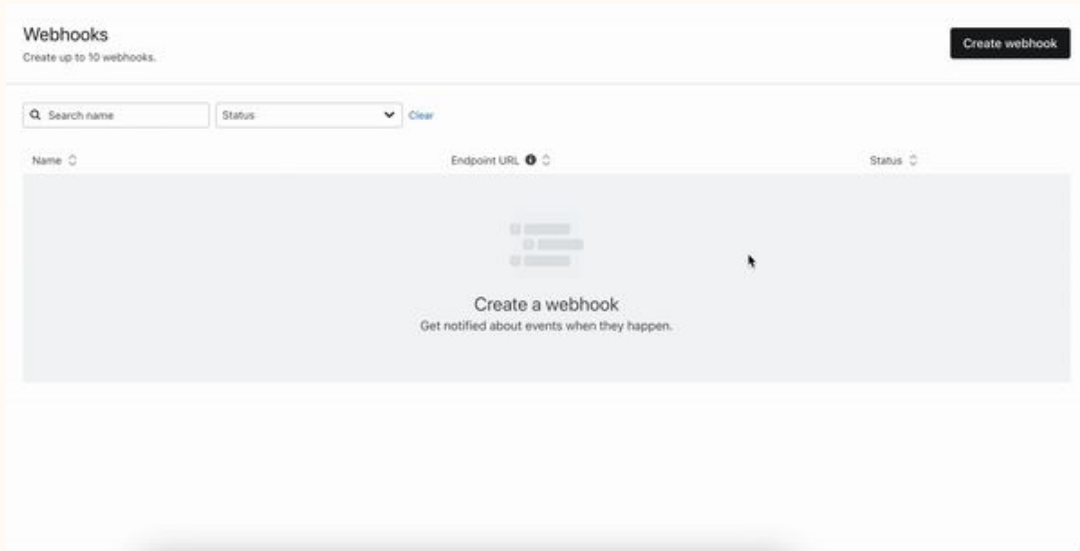
**Note:** While this is an important step to callout, customers should have their developer team setup any webhooks needed based on their account. Any technical issues should go to SA or Support.

### All developers need to get setup:

- Name
- Endpoint URL
- Secret key
- Description (optional)
- Topics

### What they DON'T need to do:

- No manual payload setup



### **What can setting up webhooks unlock?**

*Beyond use in Flows, webhooks can be used to share data to other platforms - including channel subscription events.*