

klaviyo[™]

4 steps to
accelerate your
revenue with
customer data

According to McKinsey & Company, 71% of consumers expect personalization from the brands they interact with. But Gartner, Inc. reports that 63% of digital marketing leaders continue to struggle with delivering personalized experiences to their customers.

Part of the problem is the way people throw the word “personalization” around incorrectly.

“‘Personalized’ makes it seem like I’m using their first name or their favorite color. This is more about making sure we’re not chasing somebody to take an action they’ve already taken,” says Craig Swanson, co-founder of KaisaFit.

That kind of “true” 1:1 personalization requires closing the gap between the data you collect and driving customers to purchase.

In this guide, you’ll learn how to do it, in 4 steps.

STEP 01

Consolidate data from multiple sources, across channels, at the right time

Optimizing your view of the customer requires integrating clean, accurate, and reliable data from multiple sources across your tech stack. That includes not only your ecommerce store and marketing automation platform, but also your:

- Customer data platform
- Payment + POS systems
- SKU and catalog management
- Order, shipping, and returns management
- Customer support platform
- Enterprise resource planning system
- Customer relationship management system
- On-site personalization tools
- User-generated content tools
- Loyalty platform

In-platform example:

By integrating Klaviyo with your customer support and reviews platforms, “if someone has an open support ticket, you can exclude them from receiving a reviews request flow,” says Nathan Doverspike, enterprise/MM+ customer success manager at Klaviyo. “That way you’re not asking a favor from someone who has a sour taste right now.”

Similarly, with strong integrations between your SMS marketing platform and shipping provider, you can send timely transactional texts that “enhance the customer experience from purchase through delivery,” Suzanne Orzech, senior enterprise/MM+ customer success manager at Klaviyo, adds.

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When you have all your data in one place, you can segment off of literally every data point you have and drive endless optimizations. That helps you pivot in any direction that you need to.

SUZANNE ORZECH, SR. ENTERPRISE/MM+ CUSTOMER SUCCESS
MANAGER AT KLAVIYO



STEP 02

Incorporate both real-time and historical data to pivot quickly

Most marketing and customer data platforms promise access to real-time customer data, but the real differentiator is all-time historical data. If your platform automatically archives customer data after 90-180 days, you’re not getting a true 360-degree view of your customers—let alone one you can quickly act on.

In-platform example:

With visibility into all-time historical data on a platform like Klaviyo, you can analyze BFCM purchase behavior over the last 3-5 years to determine whether you can afford to move away from discounts this year—and try something like bundling or strategically timed limited-edition drops instead.

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Use YoY reporting to see how customers have engaged, how much they relied on discounts, and how much not offering a discount will impact you moving forward. It’s about using that historical data to make smarter business decisions in the future.

NATHAN DOVERSPIKE, ENTERPRISE/MM+ CUSTOMER SUCCESS
MANAGER AT KLAVIYO

STEP 03

Save hours with pre-built automations and templates

With Klaviyo, you're never starting from scratch. Access out-of-the-box automations based on your goals, integrations, and messaging channel of choice—whether that's email, SMS, or both—and get a leg up on setting your personalization strategy.

Pre-built templates, meanwhile, give you the flexibility you need to get high-performing campaigns out the door, fast.

In-platform example:

The team at Dagne Dover built out their customer communications strategy quickly—without the help of an engineering team—thanks to Klaviyo's pre-built flows library.

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We can edit set-it-and-forget-it flows very quickly without a web developer. Then, we can just turn them on and forget about it.

MARCIA ZIMMERMAN, GROWTH MARKETING AND ANALYTICS
MANAGER AT DAGNE DOVER

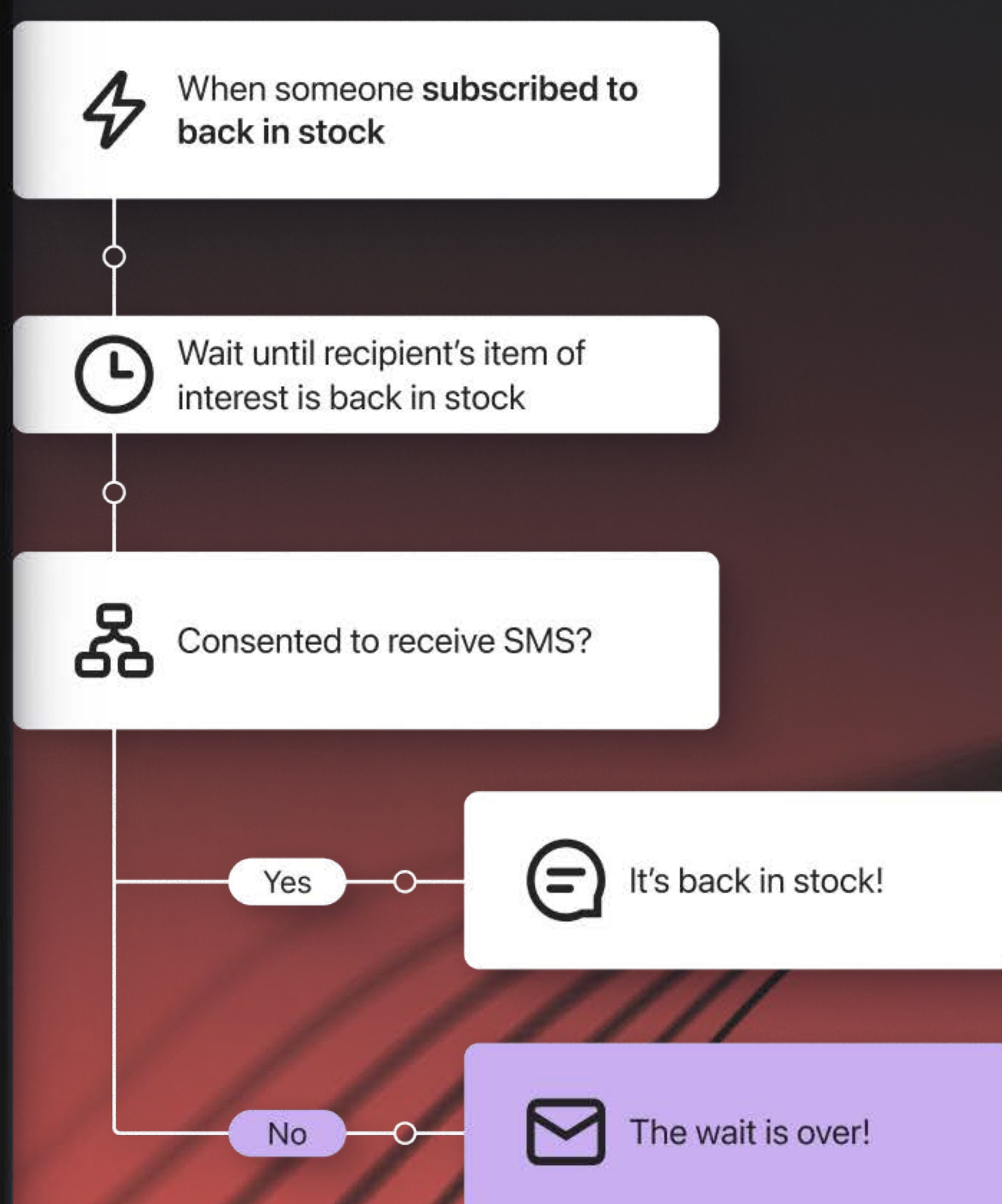
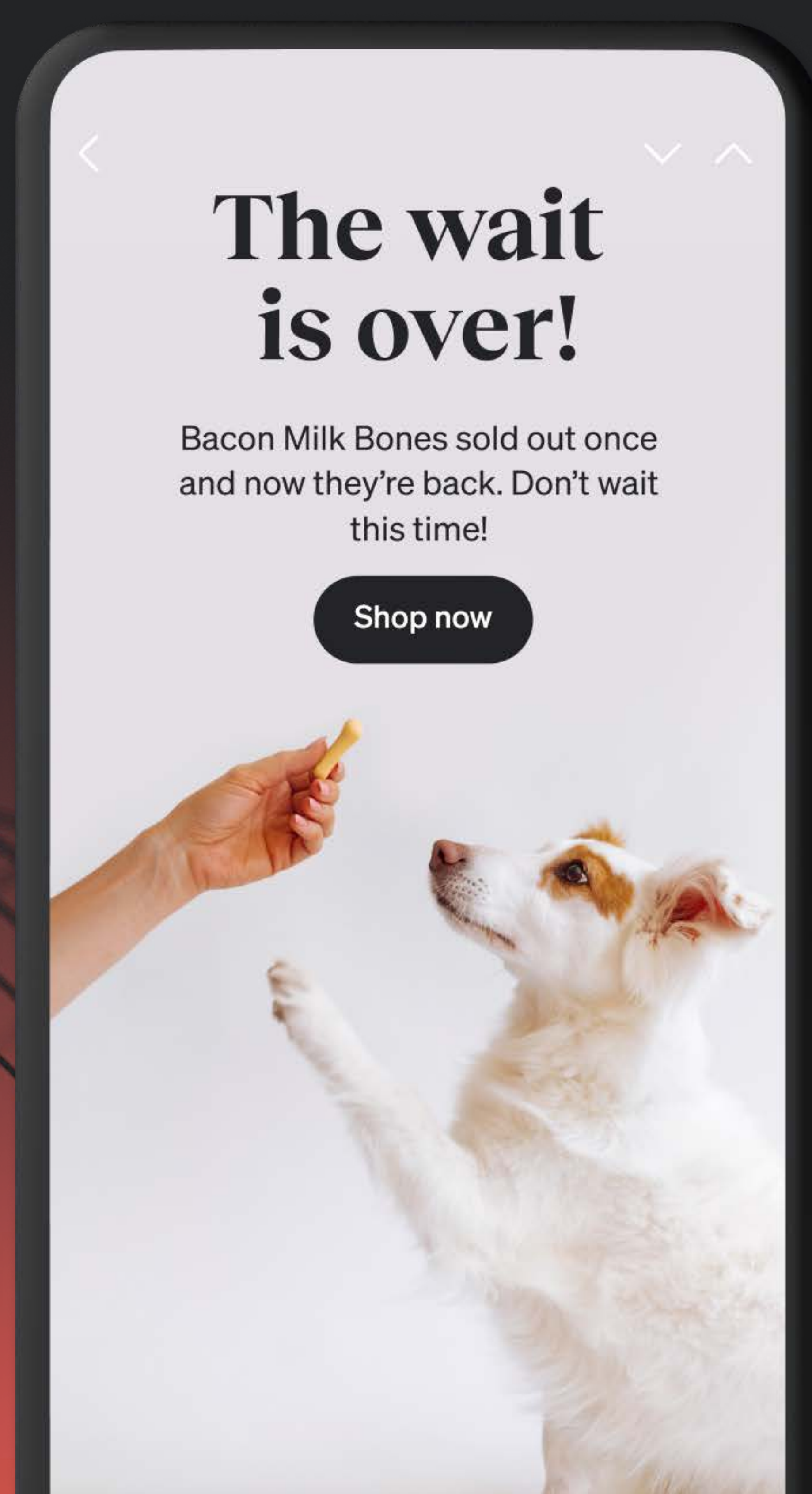
STEP 04

Apply AI and machine learning to convert customers faster

With all your real-time and historical customer data in one platform, you also get better-performing AI models that can guide you on the smartest ways to convert customers, faster.

In-platform example:

In Klaviyo, Orzech and Doverspike point out, users can segment campaigns and flows based on predictive analytics like predicted next order date, predicted customer lifetime value, predicted churn risk, and predicted demographics—all from a simple dropdown, no complicated configurations required.



Do it all from a purpose-built marketing platform

All of the above requires a marketing platform that not only is purpose-built around fast, efficient collection and activation of customer data, but also provides the intuitive tools necessary to empower marketers to engage customers in a personalized way at scale.

You have the customer data. Make sure you have a marketing platform that allows you to act on it, and drive those customers to purchase.

How Klaviyo brands use data to drive conversions:

- **Every Man Jack:** uses Klaviyo's AI-powered predictive analytics generate personalized predictions about each subscriber
- **Caden Lane:** sends messages to sub-segments of their audience based on behavioral data and engagement metrics
- **AriZona:** sent personalized thank-you messages to >25K people, referencing their custom response to a brand campaign
- **Compass Coffee:** encourages and rewards photo reviews with discount codes by using conditional splits in flows
- **Dagne Dover:** uses pre-built flows to build out their customer communications—without relying on an engineering team

Power smarter digital relationships with Klaviyo.

Get started

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