Klaviyo Marketing Analytics

Use Cases

Klaviyo Marketing Analytics

Shorten the distance from insight to action.

Faster actions

Perform robust analysis in the same intuitive platform as your marketing

Deeper insights

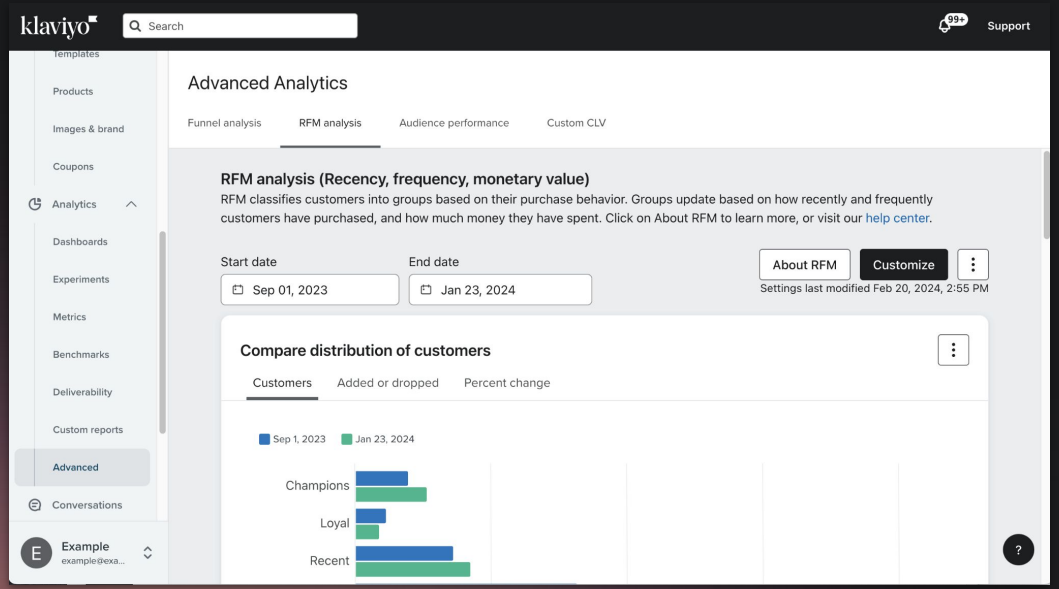
Increase repeat purchases with new insights on your customer lifecycle and product catalog

Smarter decisions

Identify who to target, with what products, and when with marketer-friendly RFM and funnel analyses

Higher ROI

Drive incremental revenue with RFM audiences and flows to reach customers at key inflection points



11%

Incremental Klaviyo attributed revenue driven by RFM segmentation over BFCM 2023

KEY USE CASE

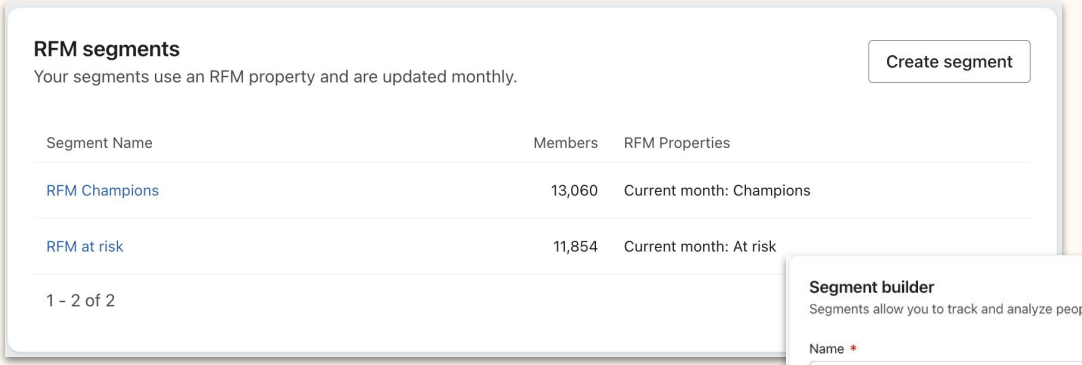
Build smarter segments

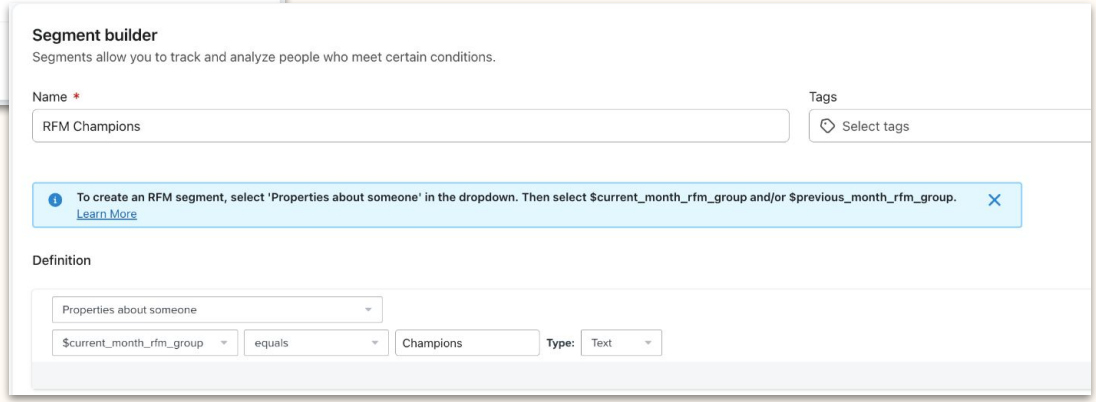
Use RFM analysis to create smarter segments across your entire customer base

Action: Create segments of each of your **RFM** groups (current month).

- *Go to RFM analysis → RFM segments → Create segment*

Result: Save time and pull smarter segments that generate more revenue





KEY USE CASE

Reach customers at key inflection points before they churn

Trigger flows based off RFM group change.

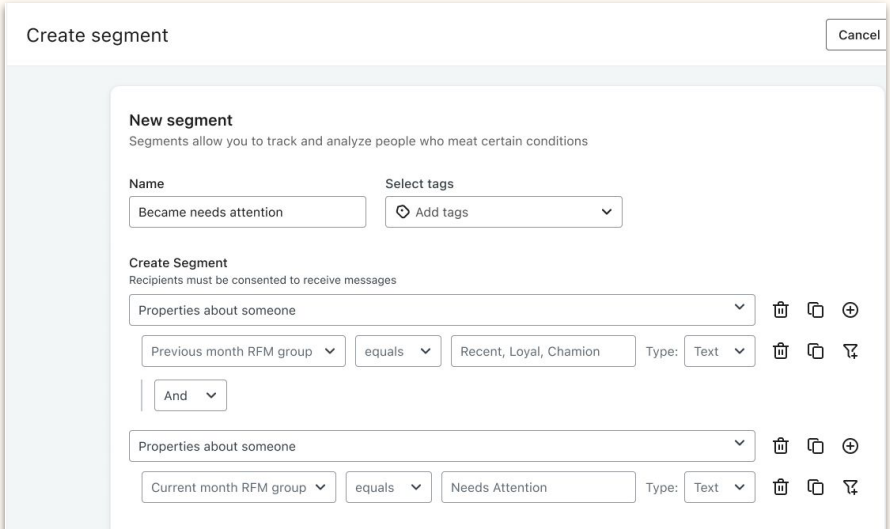
Many customers are seeing >2X ROI on these flows alone!

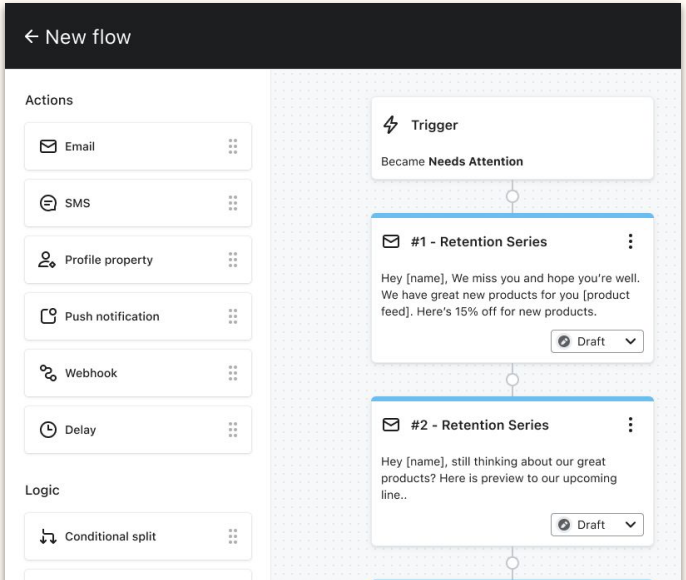
Insight: In your **RFM analysis**, you find that over the last 6 months your Needs Attention cohort is growing.

Action: Create a flow when someone moves to RFM At Risk or Needs Attention

**Back populate this segment-triggered flow when setting it live for the first time!*

Result: Drive incremental revenue and repeat purchase rates





KEY USE CASE

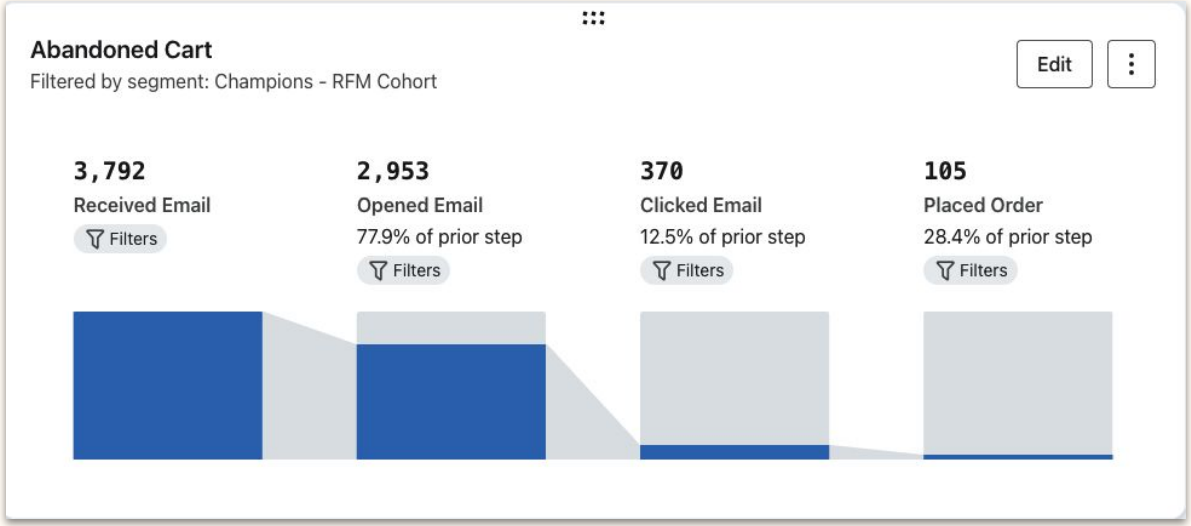
Pinpoint opportunities to move customers from nurture to purchase

Optimize your pre- and post- purchase customer journeys

Insight: After running a **funnel analysis** on your abandoned cart series and filtering by segments, you find that Needs Attention customers are dropping off after opening the email, and Champion customers are dropping off after reaching your website

Action: Optimize your welcome series emails at the point of drop-off, testing different offers / bundles / content to Needs Attention customers, and target Champions with a segment-targeted form to incentivize purchase once they hit your website

Result: Increase conversions and drive incremental revenue



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KEY USE CASE

Identify which tactics are working

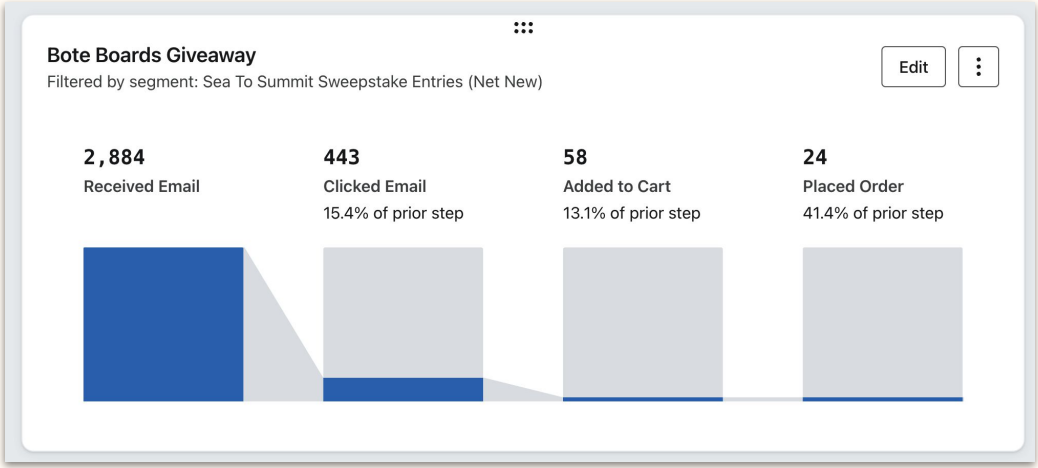
Evaluate sign-up channels & uncover how to improve your overall marketing strategy

Insight: After running a **funnel analysis** on your welcome series and filtering by segments, you find that customers who sign up for a recent partnership giveaway are engaging with your welcome series, but not purchasing

Action(s):

- Optimize your welcome series emails at the point of drop-off for this audience, testing a different discount / promo for these leads
- Invest more heavily in other partnerships and list growth tactics that lead to revenue

Result: Increase conversions and improve margins (investing more in channels that drive revenue)



FUTURE USE CASE (end of Q2)

Identify what products to promote, bundle, and merchandise.

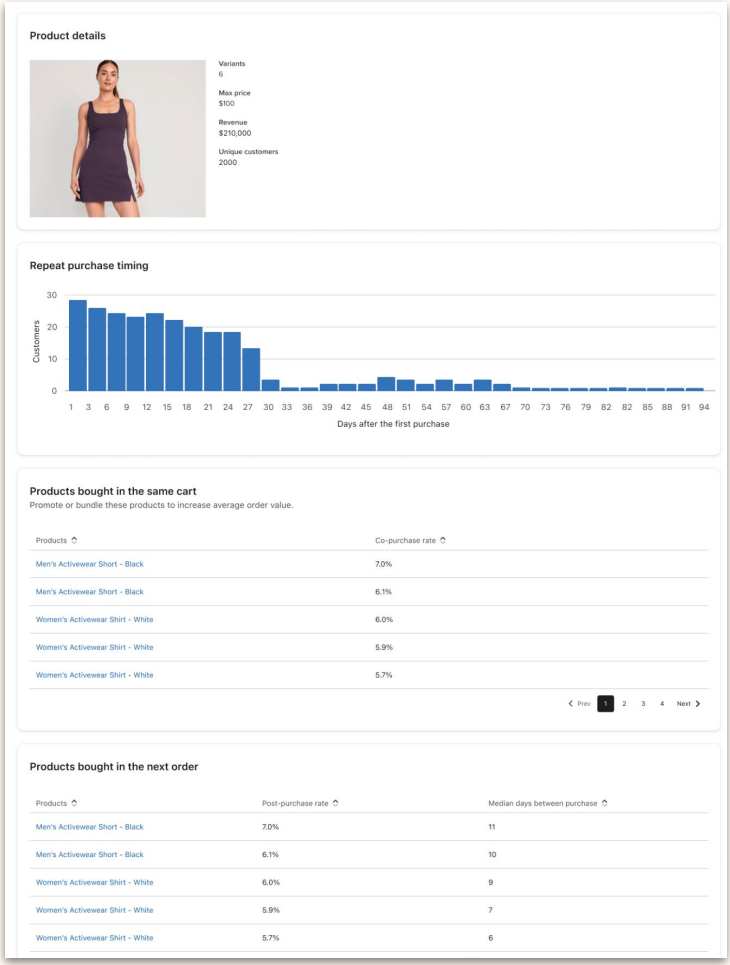
Use catalog insights to drive repeat purchase and decisions across your business.

Insight: In your **catalog insights**, you find that customers are most often repurchasing 12 days after their first purchase of your best-selling dress, and that they are most likely to buy men's active shorts next.

Actions:

- Adjust your post-purchase flow to reflect accurate re-purchase timing and include cross-promotion of your active shorts.
- Run a one-time campaign to customers likely to buy soon with a bundle of these items
- Inform your merchandising team about these insights so they can plan accordingly

Result: Drive repeat purchases and higher AOV



Use Case Strategy

How can we help our customers realize value?

Start with what they are looking to achieve.

Increase repeat purchase rate

CRAWL

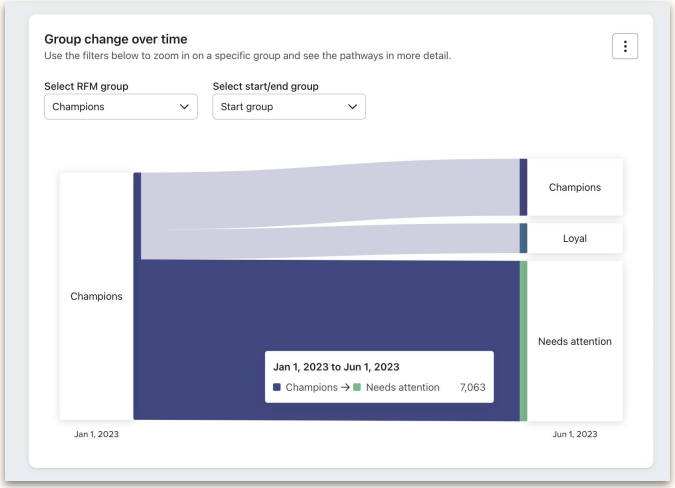
Automate messages when a valued customer becomes at risk

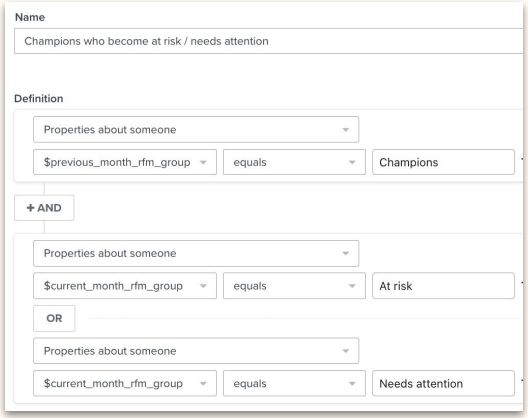
Insight: High-value customers are becoming at risk of being inactive

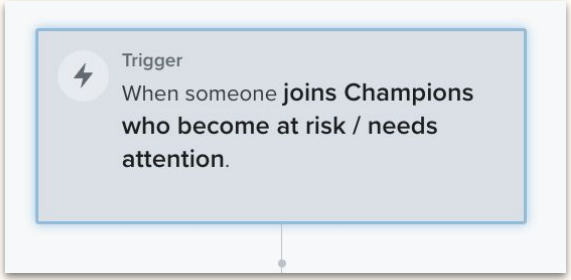
Action: Create a flow when someone moves from RFM “Champion” to “Needs Attention” or “At risk”

- 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







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

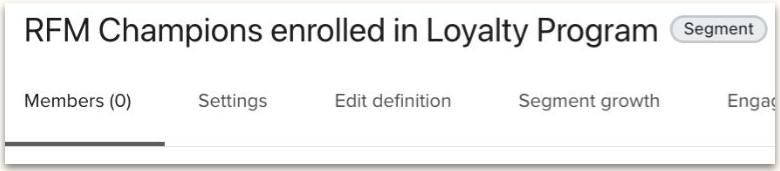
CRAWL

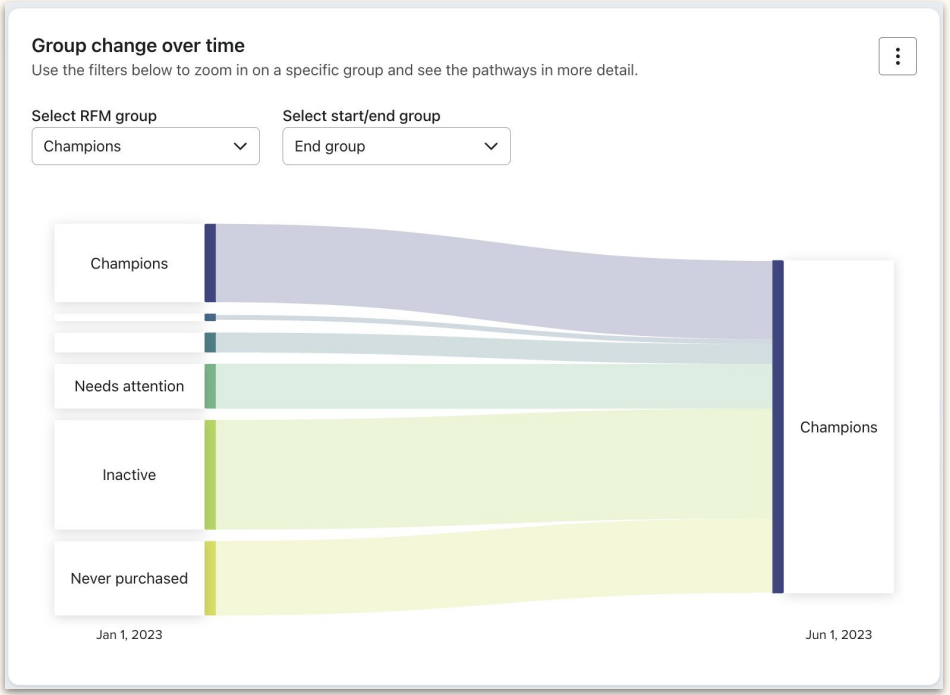
Champions to Loyalty Members

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





Metrics to track success: Loyalty signups

CRAWL

Champions to Loyalty Members (cont.)

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

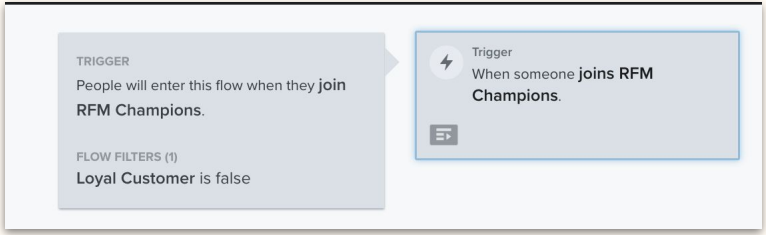
Action:

- 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



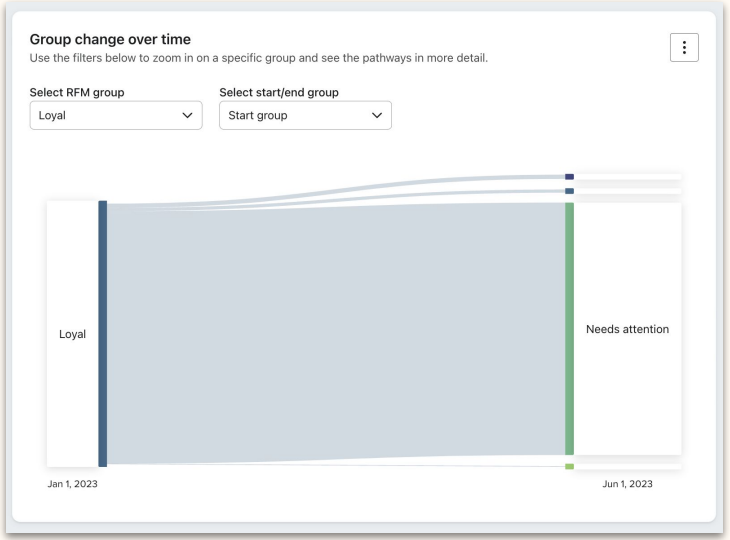
CRAWL

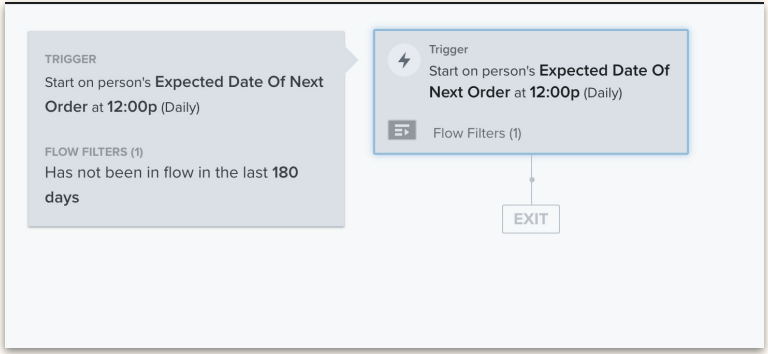
Retain Loyal customers when they become a churn risk

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

CRAWL

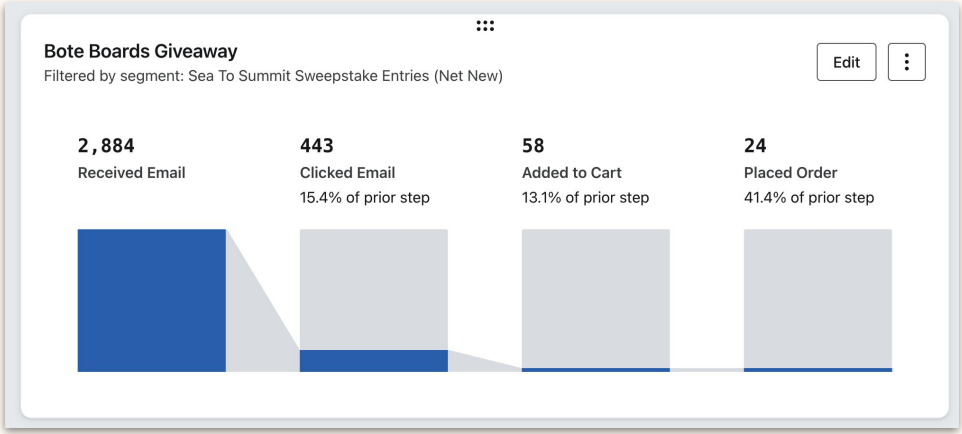
Move customers from nurture to purchase

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

CRAWL

Identify and prevent churn

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

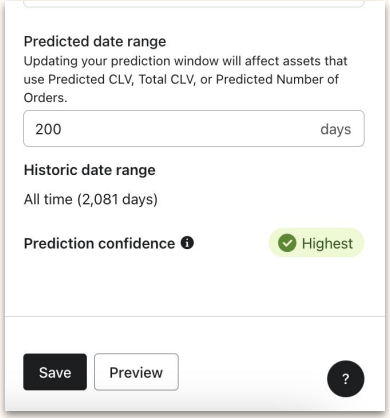
Action: Use customized CLV window to identify customers at risk for churn, send a personalized email or SMS campaign to incentivize a timely purchase

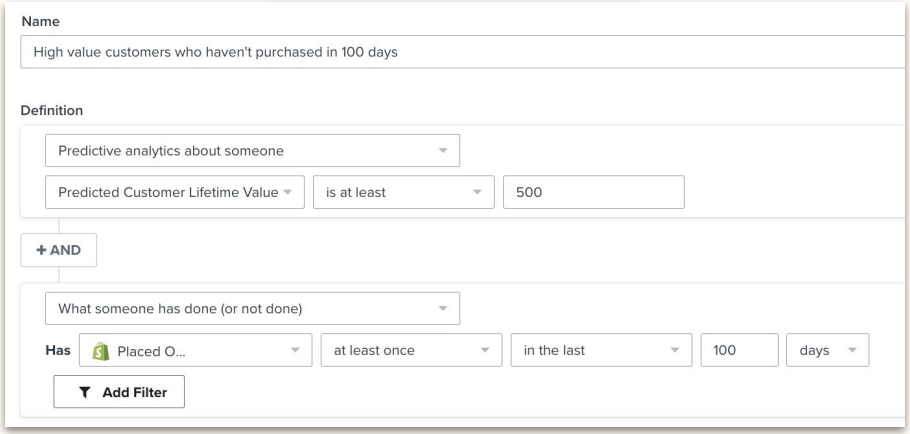
- Change the prediction window to 200 days
- Build a segment based on customers who have a high-value predicted CLV and haven't purchased in the last 100 days

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





CRAWL

Optimize upcoming campaigns

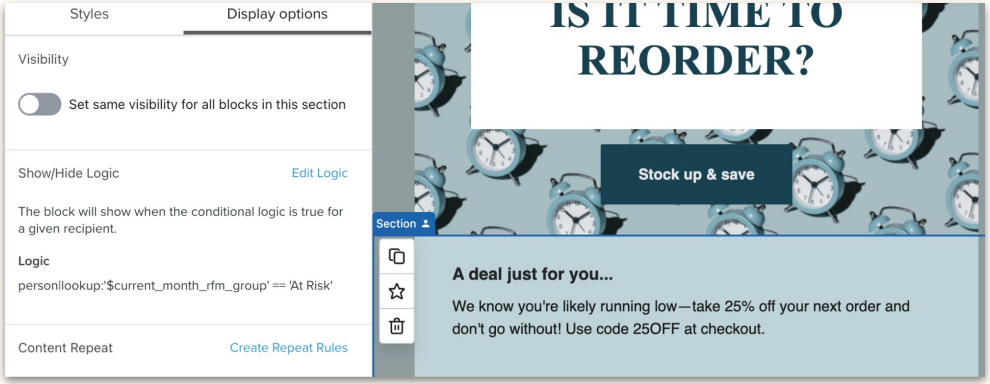
Insight: Your “At risk” customers have been growing MoM.

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:
person|lookup:'$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

CRAWL

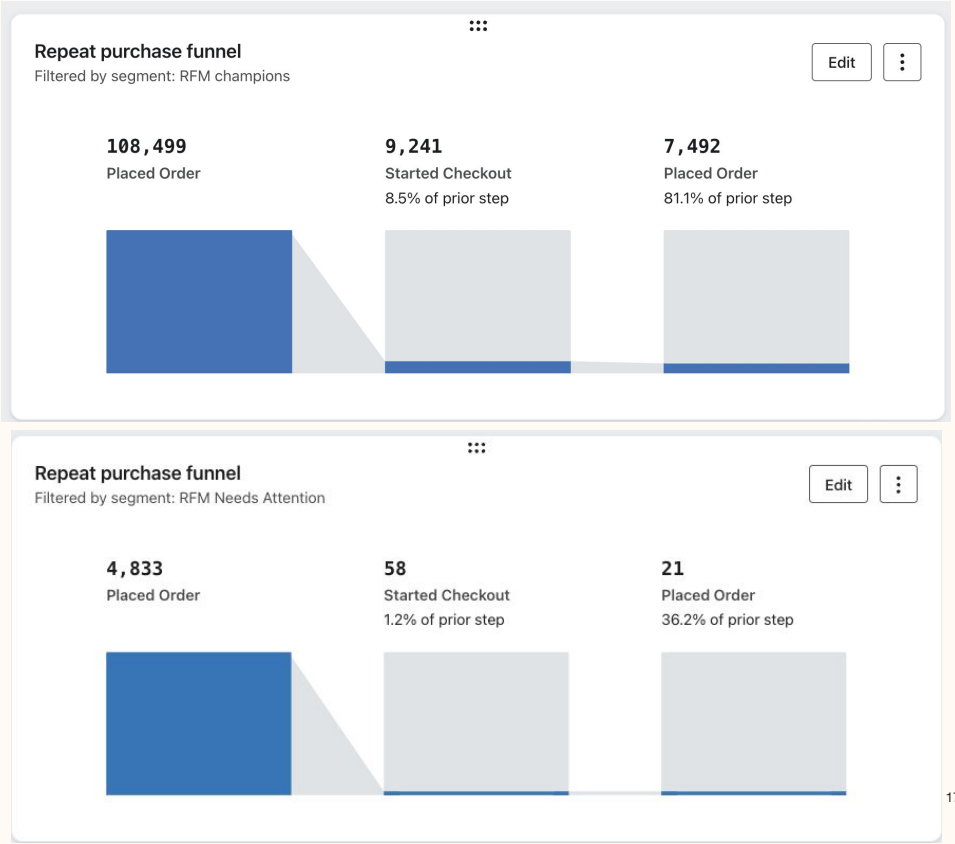
Supercharge campaigns to at risk audiences

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



CRAWL

Promote multiple repeat purchases in your winback

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.

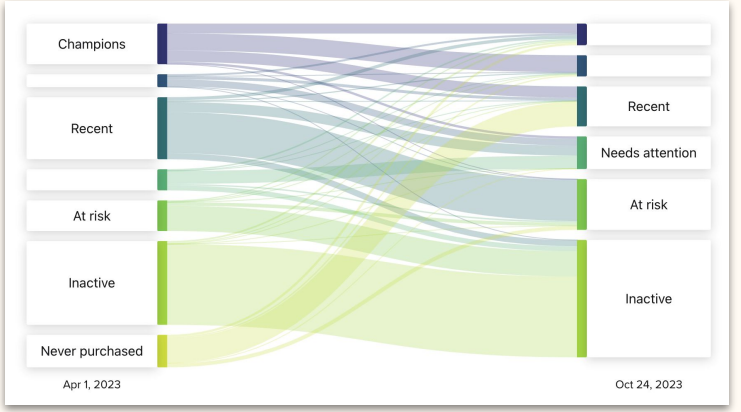
Action: Add Conditional Splits for 2x Buyers in your Winback Series

- 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

CRAWL

Retarget engaged, high value customers

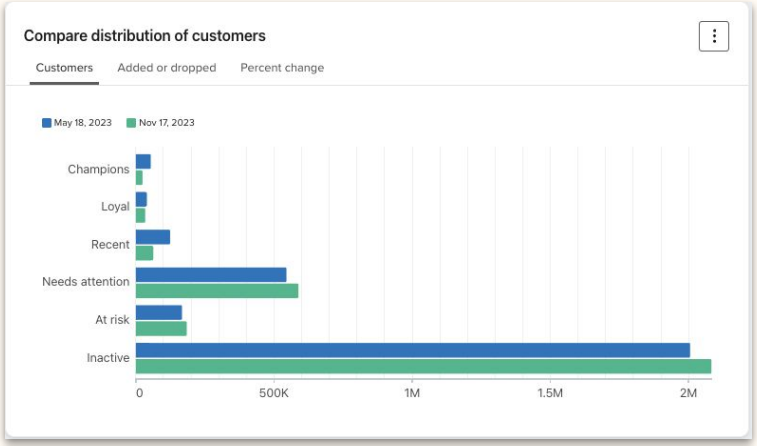
Insight: Over the last 6 months, Champion and Loyal customers are steadily decreasing.

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

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%

CRAWL

Drive higher AOV with high value customers

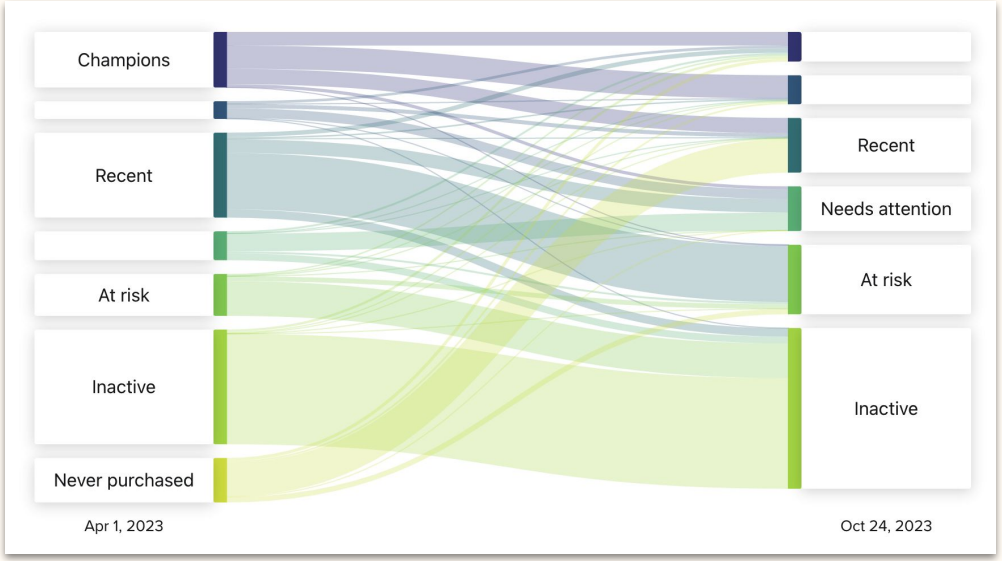
Insight: Your AOV is below your target.

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

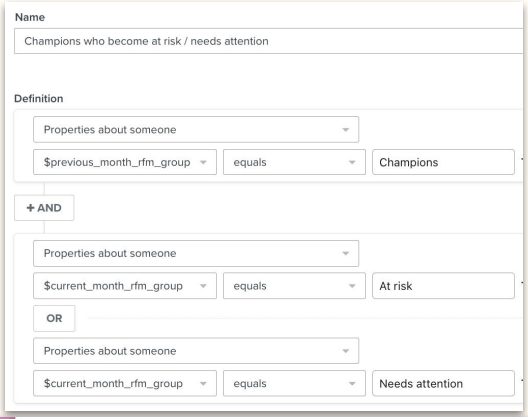
Insight: Over the last quarter, you're seeing Loyal and Champions customers move to At Risk.

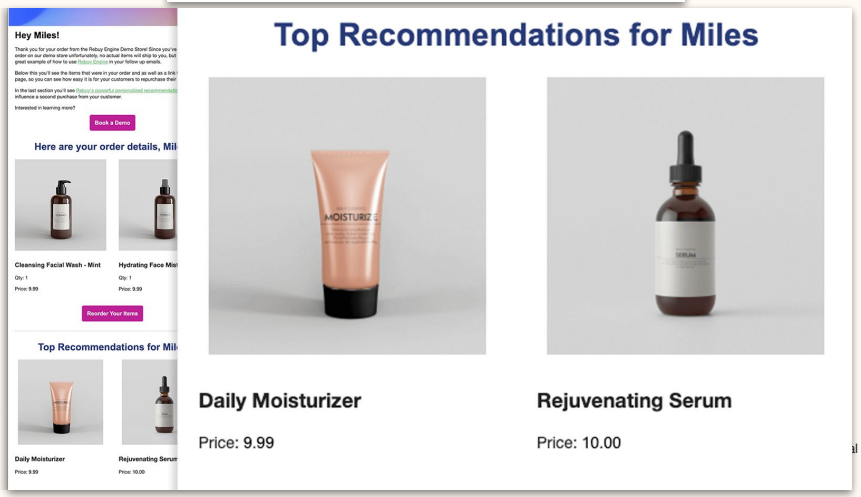
Action: Run a one-time campaign to offer a month free on your subscription or limited access to a new product line they might be interested in.

- 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)

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





CRAWL

Optimize based on last year's performance

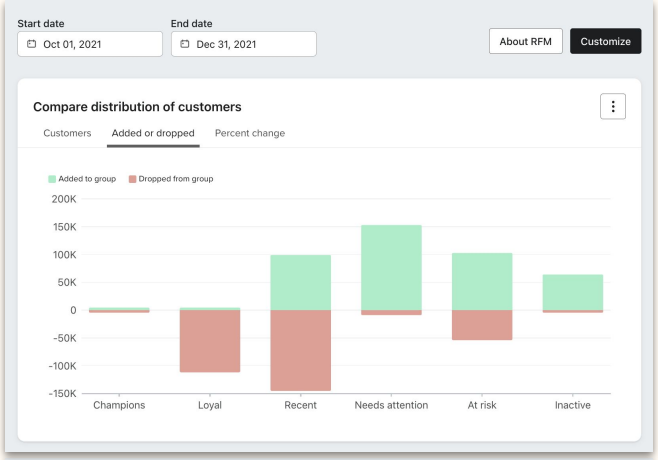
Insight: Analyzing the last two BFCMs, you see that your 2022 campaign moved a lot more of your audience to "Champions" compared to your 2021 campaign.

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

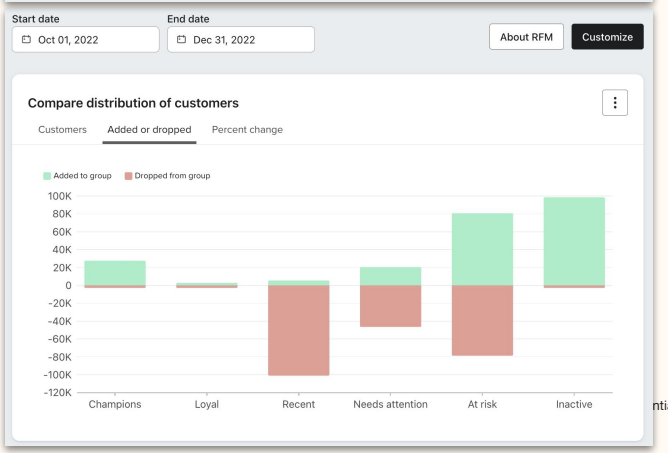
Recommendation: Duplicate your best performing template from last year; update with new product imagery.

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

2021 performance



2022 performance



WALK

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

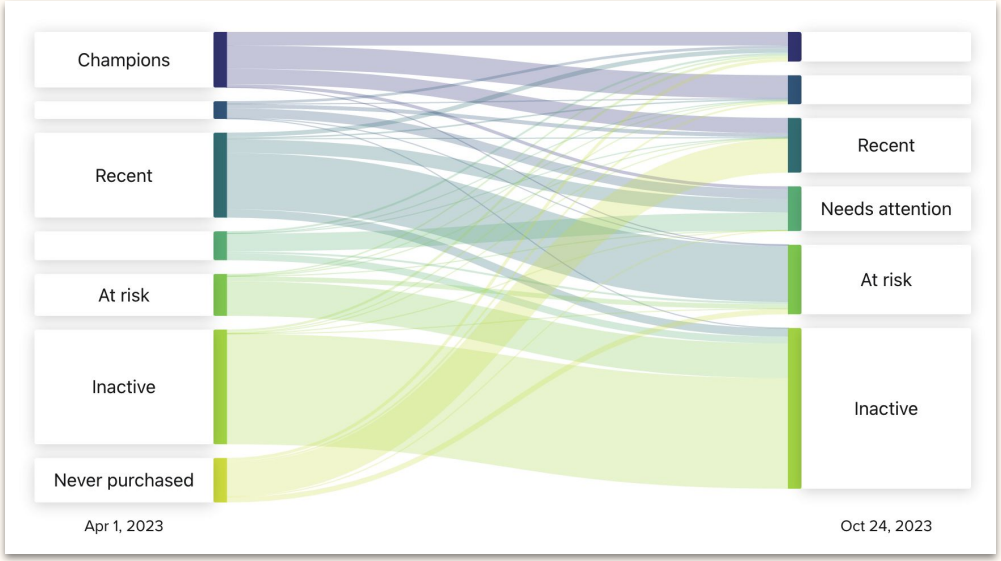
Insight: Over the last 6 months, Champions and Loyals are retaining, but Recent purchasers are most often falling into At Risk, and At Risk customers are then trending towards Inactive.

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

WALK

Expand your replenishment & winback flows

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

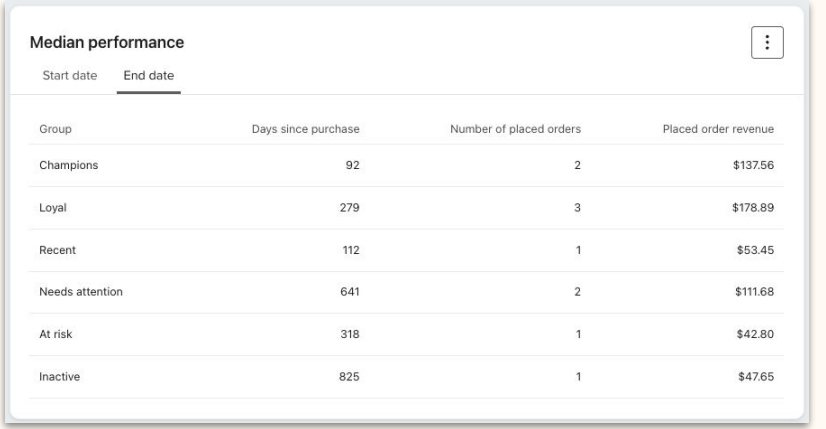
Action: Set up a Repeat Purchase Funnel and filter by RFM segment to understand how repeat purchase behavior is differing by RFM group.

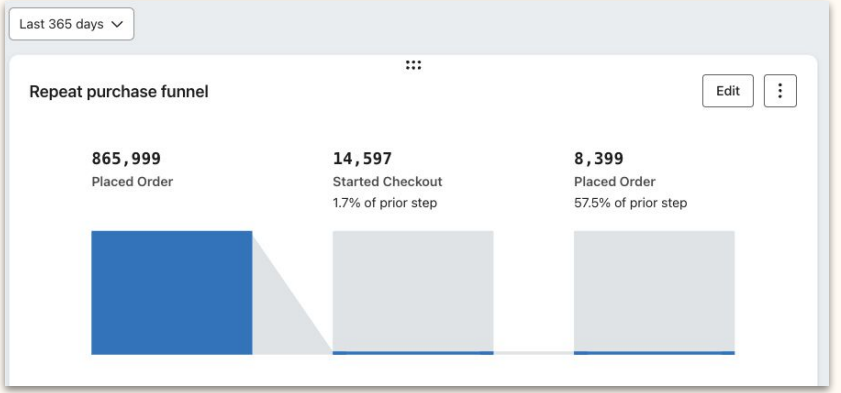
- Customize data ranges
- Filter by specific products or categories to understand how different items when purchased first lead to a subsequent purchase

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





WALK

Optimize your flows by segments

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

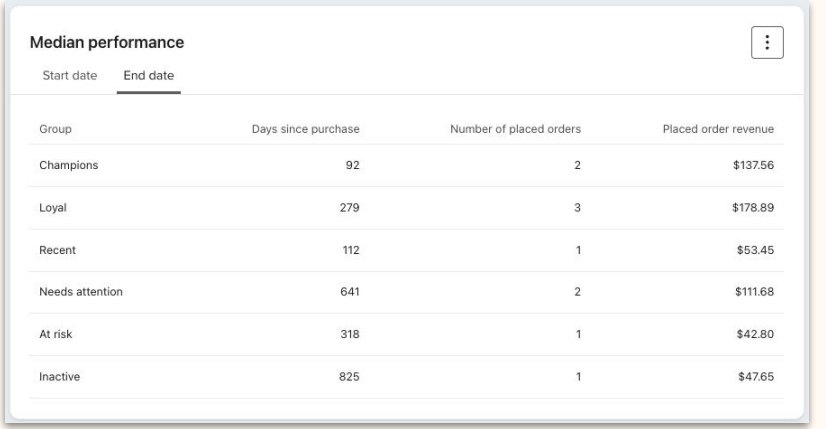
Action: Create purchase funnel reports for each of your top flows – Browse Abandonment, Abandoned Cart, Winback, etc.

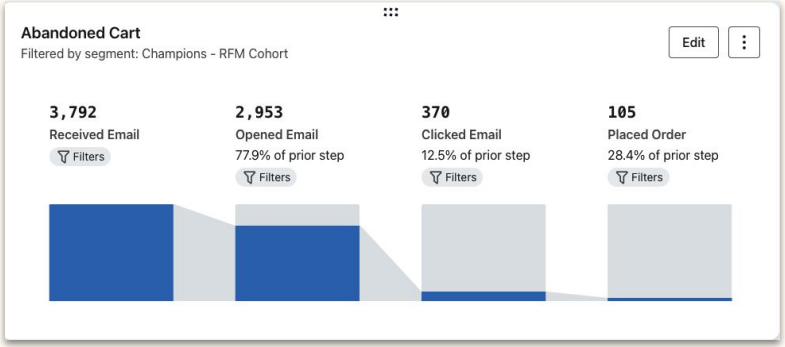
- Filter each funnel by RFM segment
- Customize date ranges

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





WALK

Personalize campaigns at scale

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.

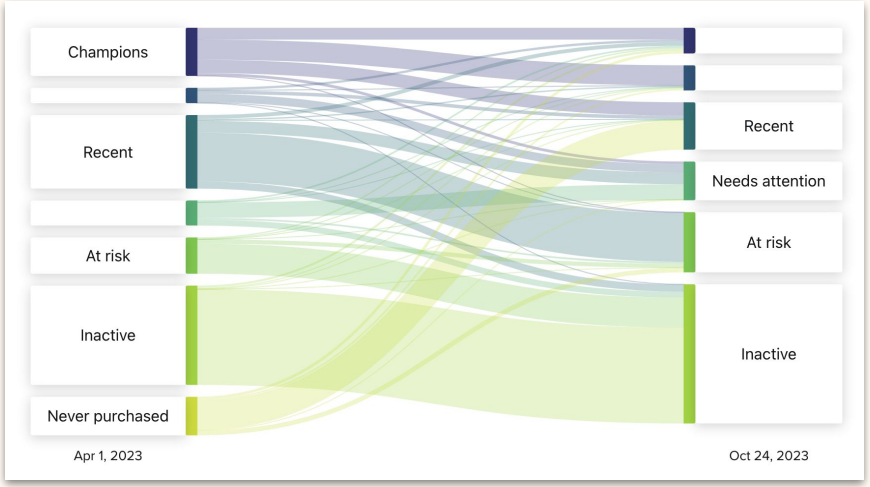
Action: Personalize content blocks in high impact campaigns

- 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.

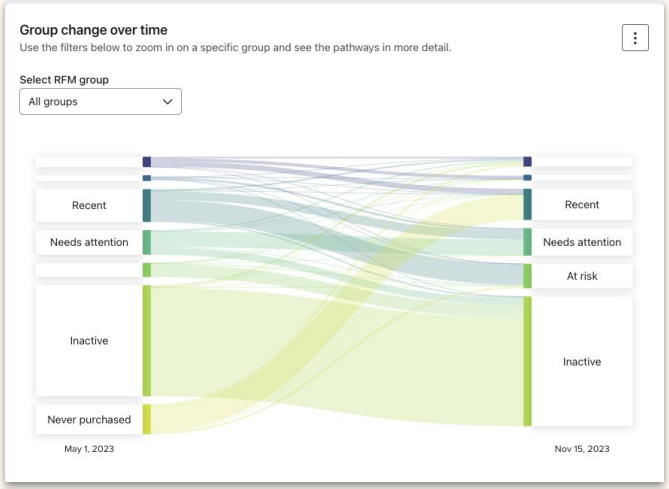
Action: Add a Winback Series that is timed specific to purchase behavior (or adjust an existing series)

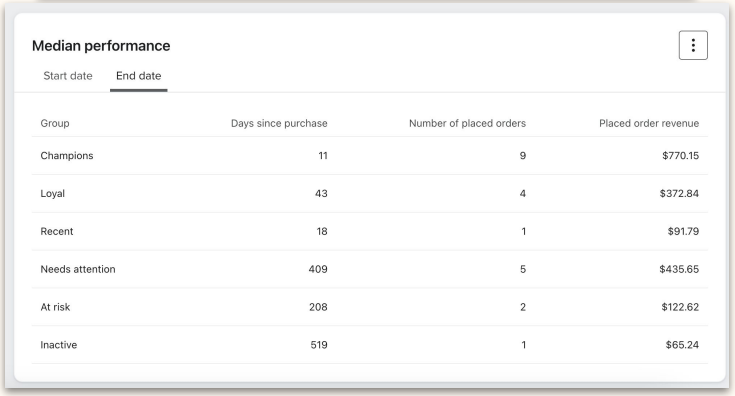
- Create a Winback series that starts 60 days post-purchase and stretches out to 200 days post purchase.

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

Level-up your winback flows

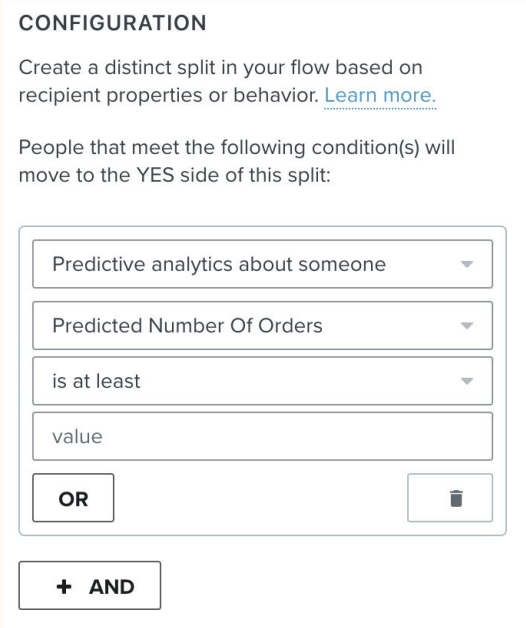
Insight: You're seeing a drop-off from first to second purchasers.

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



RUN

Identify and prevent churn 2.0

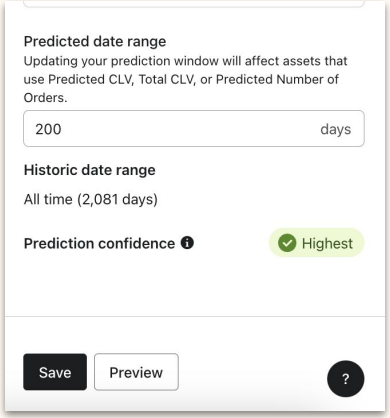
Insight: You identify that your customers most often become Inactive after 200 days of no purchases.

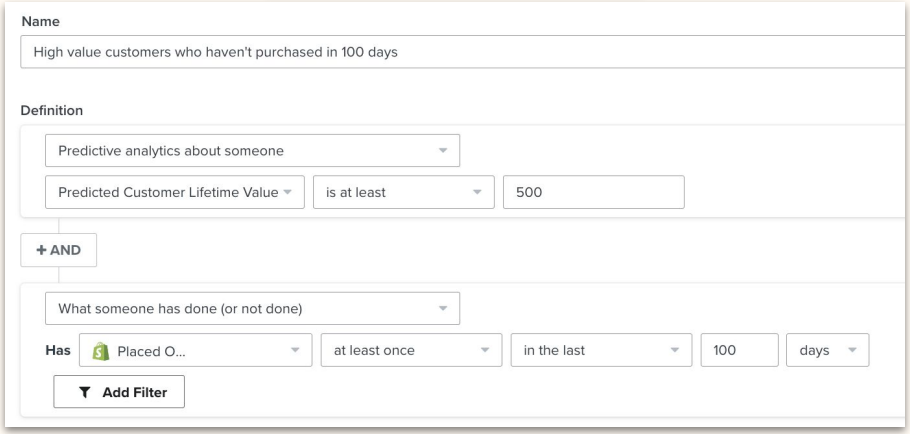
Action: Use customized CLV window to identify customers at risk for churn, send a personalized email or SMS campaign to incentivize a timely purchase

- 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





RUN

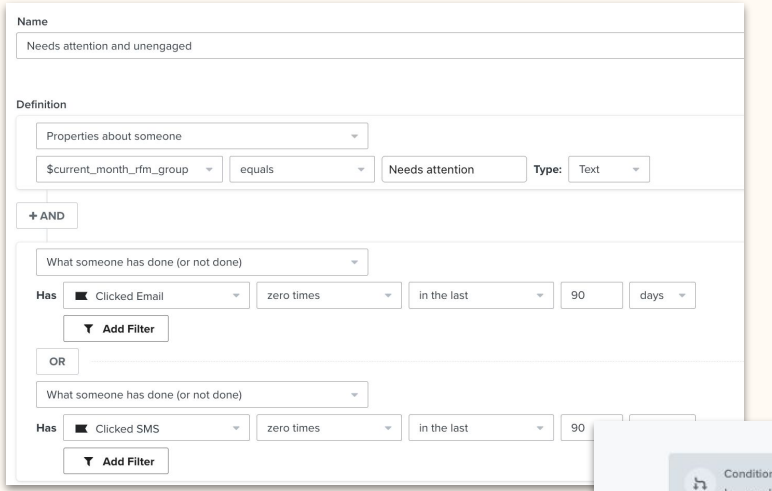
Automate direct mail campaigns to customers before they churn

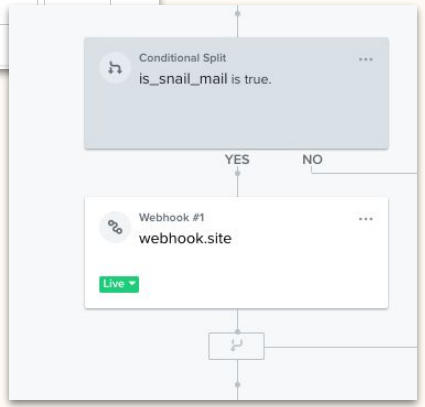
Insight: Your “Needs attention” cohort has increased this quarter after many email and SMS campaigns.

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.





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

Increase return on ad spend

CRAWL

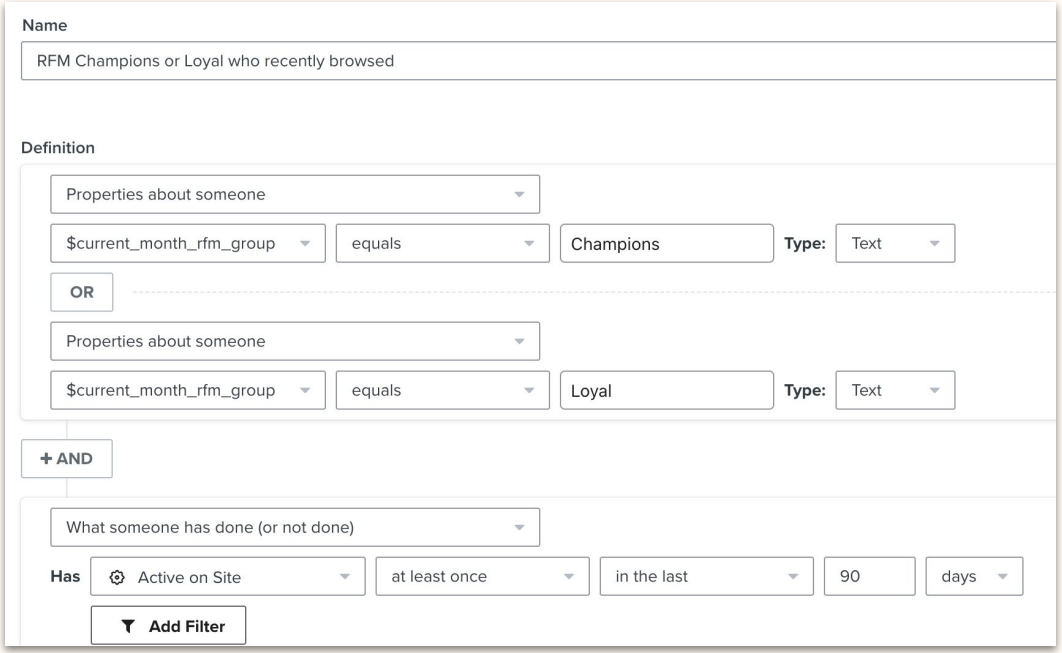
Create lookalikes of your best RFM customers who are engaged

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



WALK

Exclude recent buyers that aren't likely to buy again

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

RUN

Optimize your lead conversion from social channels

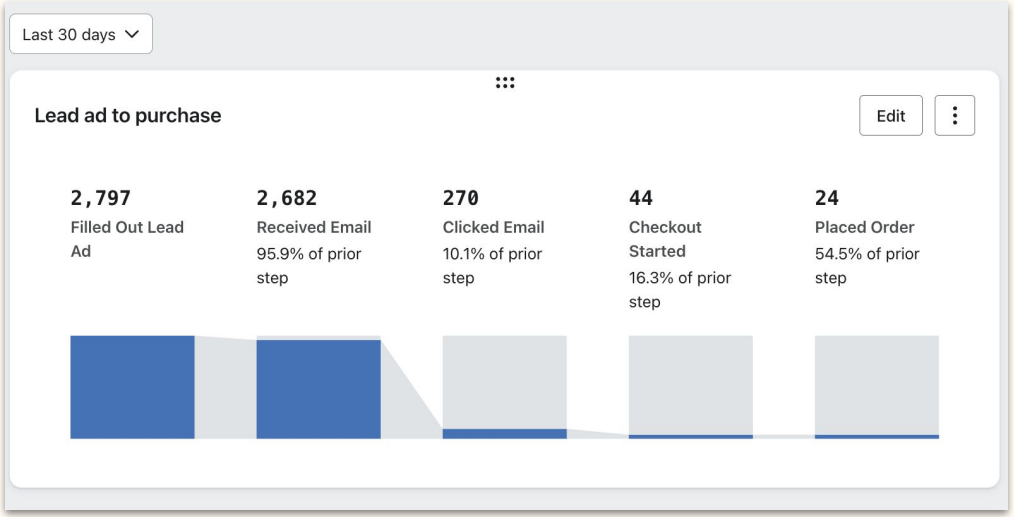
Insight: Your return on ad spend with Facebook has dipped over the last few months.

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

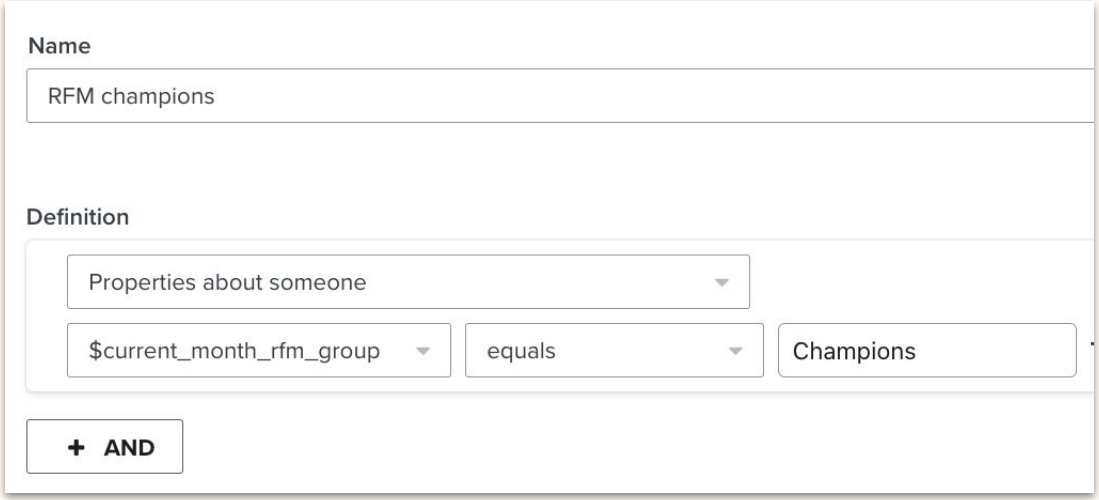
CRAWL

Create lookalikes of your top RFM customers

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

Engage with unengaged audiences

WALK

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

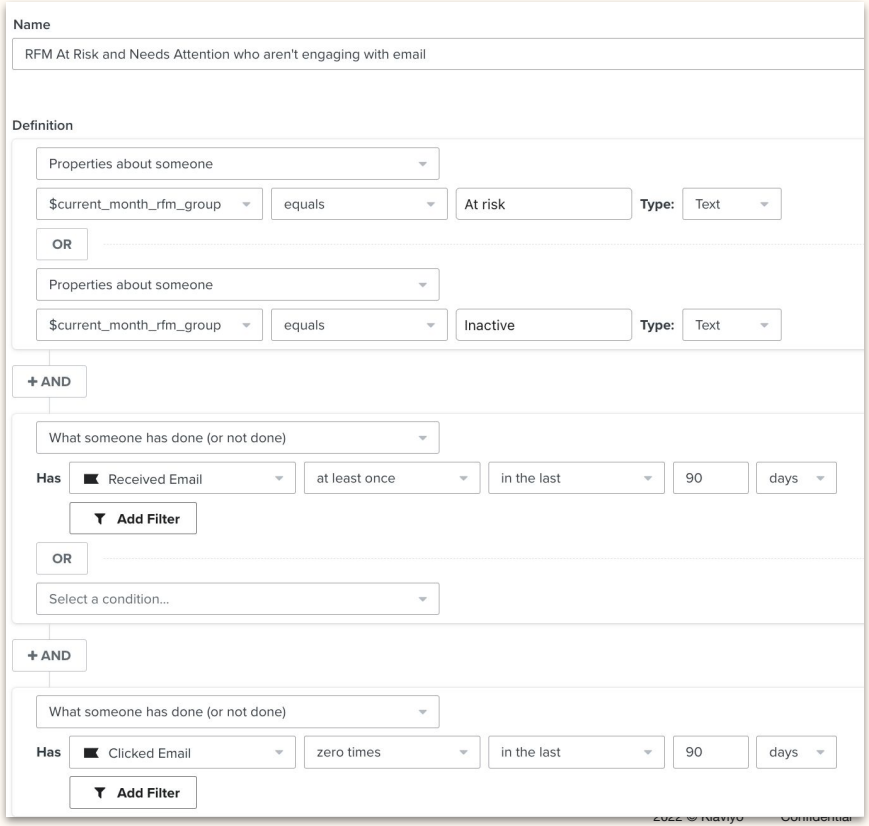
Insight: At Risk and Inactive customers aren't responding to your emails or SMS messages

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



WALK

Retarget unsubscribed audiences at risk of churn

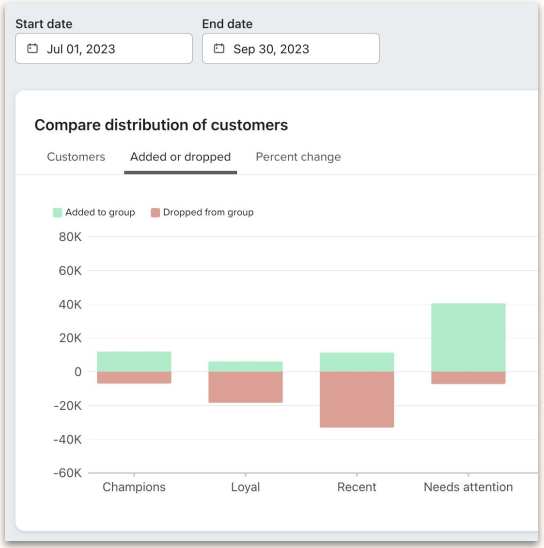
Insight: Your last quarter of email and SMS campaigns resulted in many customers unsubscribing and moving to Needs attention.

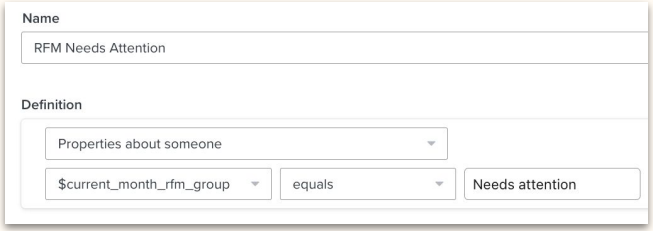
Action: Retarget Needs attention audience on Meta or Google Ads.

- 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





RUN

Retarget unsubscribed audiences & personalize onsite

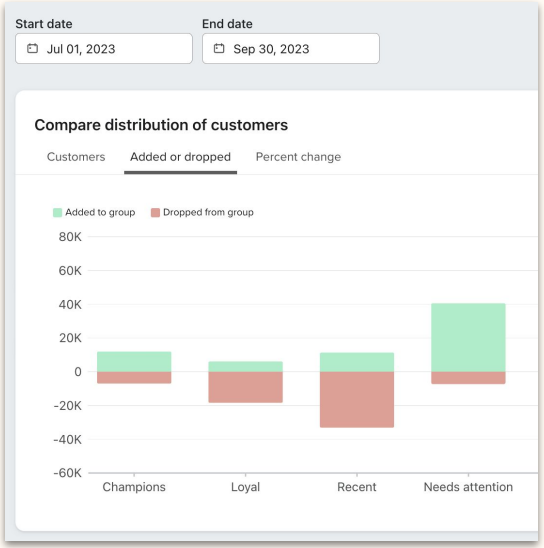
Insight: Your last quarter of email and SMS campaigns resulted in many customers unsubscribing and moving to Needs attention.

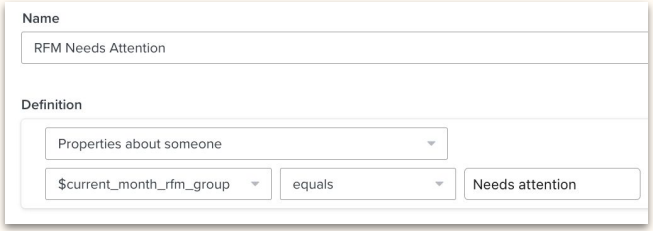
Action: Retarget Needs attention audience on Meta or Google Ads and then personalize your onsite experience to reflect a consistent experience.

- 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





Increase customer lifetime value

CRAWL

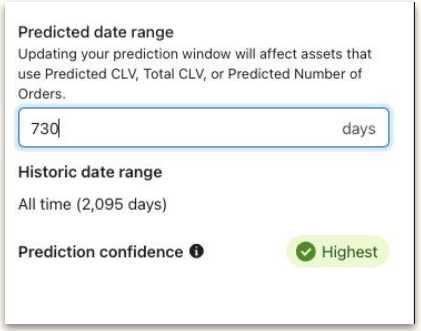
Get granular with CLV and target more effectively

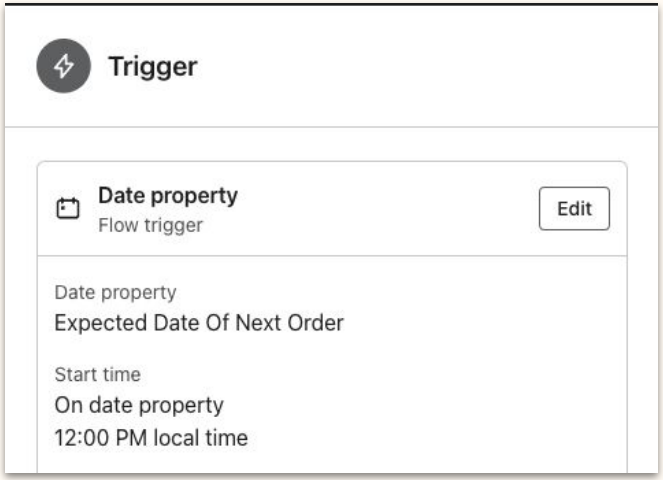
Insight: Many customers often repurchase beyond a year of purchase

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

CRAWL

Get granular with CLV and better target churn risk customers

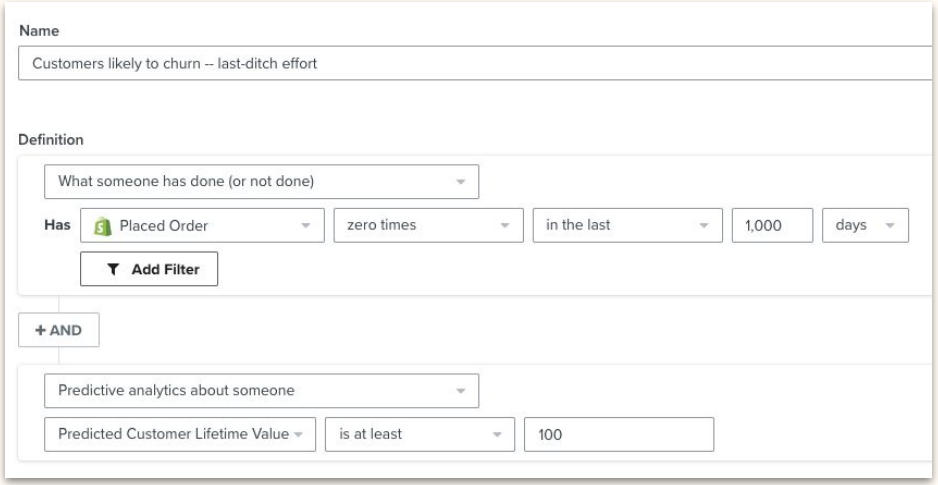
Insight: You identify that three years is the point at which unengaged customers churn

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!



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

CRAWL

Maximize CLV of your best customers

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

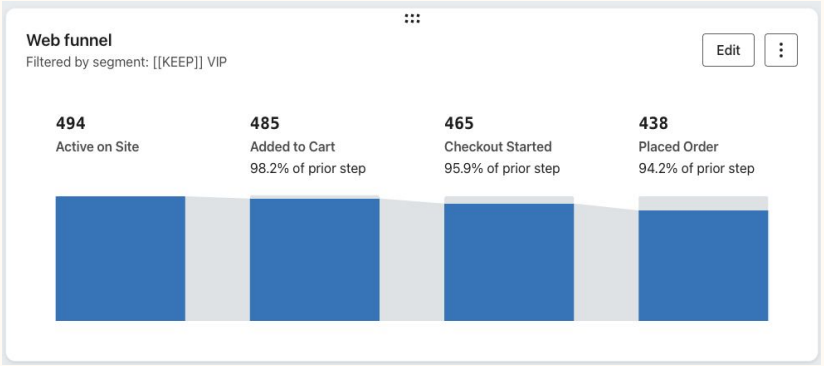
WALK

Optimize your web experience to enhance conversions

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
  - 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

WALK

Run A/B tests to identify what offer works best

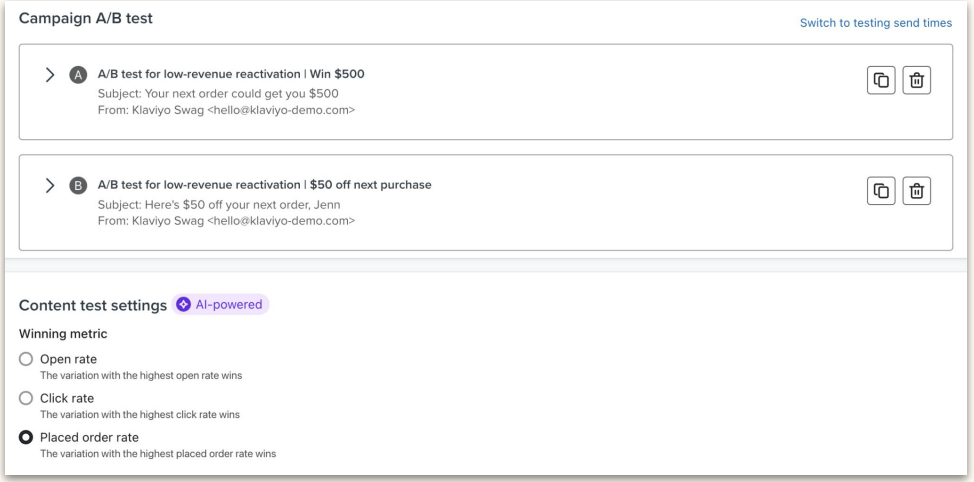
Insight: You identify your lowest revenue segments using audience performance

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!



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