RETENTION · LIFECYCLE · PROFIT FIRST · ALLERGIC TO HYPE

AD HOC MEDIA — RETENTION PRACTICE

RETENTION & LIFECYCLE EMAIL PLAYBOOK

The whole lifecycle in one place — signup to win-back, plus the disciplines that hold it together. A practical, profit-first system built for operators.

13
SECTIONS

7
PRE-PEAK LEVERS

1
PRINCIPLE THAT RUNS IT ALL

THE SYSTEM

WHAT'S INSIDE

01 Capturing the signup

02 The welcome flow

03 Email format & sender

04 Abandonment flows

05 Post-purchase flow

06 Win-back flow

07 Offers — the biggest lever

08 Surveys & segmentation

09 Testing discipline

10 Preparing for peak (BFCM)

11 Deliverability & design

12 AI & the email-platform MCP

13 Quick-start checklist

THE ONE PRINCIPLE

OPTIMIZE FOR PROFIT, NOT OPENS.

Opens and clicks are diagnostic at best. The only number that pays the bills is incremental order revenue. Every play here is built to be tested against it.

BEFORE ANYTHING ELSE

IF IT WINS, HOW MUCH REVENUE DOES IT ADD?

That single question gates every test in this playbook. Not opens. Not clicks. Not platform-reported revenue. If a change can't be tied to incremental profit — and weighed against the effort to run it — it doesn't ship.

VANITY

OPENS · CLICKS

Diagnostic signals. Useful for debugging, useless as a scoreboard.

TRUTH

INCREMENTAL PROFIT

The only metric that decides whether a play stays or dies.

SECTION 01

CAPTURING THE SIGNUP

01

Pop-up timing is one of the fastest wins available, and most brands set it once and forget it. Treat it as a surface you test continuously.



+15–25%

opt-in lift from simply moving the close button. **A/B test left vs. right.**

- **Re-trigger on dismissal.** If a visitor closes the pop-up, present a softer follow-up offer ~30 seconds later.
- **Test continuously.** Aim for ~10 meaningful pop-up tests over six months — not one and done.

OFFER POP-UP

10–20%

expected opt-in rate

VALUE-BASED POP-UP

5–10%

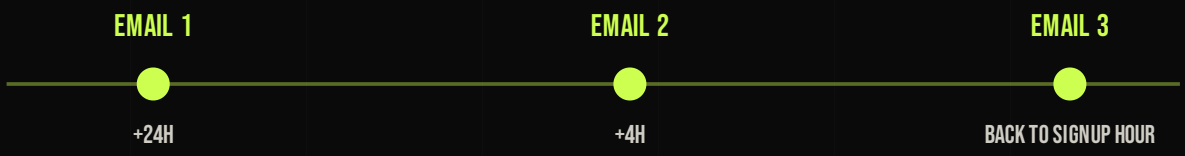
expected opt-in rate (no discount)

SECTION 02

THE WELCOME FLOW

02

Anchor to the signup hour. If someone opted in at 9:30 a.m., they've proven they're reachable then — space the flow to land back in that window.



DISCOUNT CODE

Generic code = "no rush." Unique code + expiry = urgency. Pick for the behavior you want.

DON'T SUPPRESS

Don't block new signups from campaigns. At most, exclude them 5–7 days. Err toward over-sending.

SENDER NAME

A person's name is fine — but make it clear it's from the brand to stay compliant.

TWO WORKHORSE EMAILS

DAY-5 FOUNDER NOTE

Personal, text-based. Thank them, tell the "why I built this" story, remind them the discount's still live. 5% CTR is strong here.

"WHY DIDN'T YOU BUY?"

Ask non-purchasers directly. Give ~4 tappable reasons, then segment and route on the answers.

SECTION 03

EMAIL FORMAT & SENDER

03

On most accounts, the highest-performing email is the one that doesn't look like marketing.

WINS ON MOST ACCOUNTS

TEXT-BASED

```
Hey — Justin here.
Quick personal note…

_____

p.s. one thing →
```

Feels personal, lands in the primary inbox. Use for Email 1 and every founder note.

WHEN IT EARNS IT

GRAPHIC / DESIGNED

For visual-first brands where the product is the hook. Don't default to heavy design.

RULE OF THUMB

DON'T DEFAULT TO DESIGN. EARN IT, OR SEND TEXT.

SECTION 04

ABANDONMENT FLOWS

04

Few brands have all four built — having them is an edge. The deeper into the funnel, the higher the intent.



INTENT RISING

- **Site abandon** — no product viewed. Lead with brand story, not a product.
- **Browse / Cart / Checkout** — show the product; checkout is highest intent.

BEST SINGLE HACK

A/B test the subject line on the first abandonment email. That's where the biggest lift hides.

DON'T DISCOUNT PAST BUYERS

In abandonment flows, discounts train your best customers to wait for a deal.

SECTION 05

POST-PURCHASE FLOW

05

Get them to **use the product and feel the value** — that's what drives reviews, repeat, and LTV. Don't let it over-compete with your 3–4 weekly campaigns.

IMMEDIATE	**Founder thank-you** (text-based). Acknowledge the trust — "we packed it with care." End with a P.S. upsell.
DAY 2-3	**Product education.** How to use it, how to get results fast.
DAY 4-7	**More education / social proof.** Additional how-to or community content.
DAY 10	**Cross-sell / upsell.** Timed to when the product arrives and excitement peaks.
DAY 21-28	**Founder check-in.** Warm, personal: "you should be feeling this." Then a soft reorder nudge.

SECTION 06

WIN-BACK FLOW

06

Trigger by repurchase cycle, not a calendar guess — ~day 90 for a consumable, much longer for durables. A generic "we miss you" won't move anyone.

MAKE IT FEEL PERSONAL

A static code framed as customer-specific — "30% off, just for you" — beats a generic blast.

STORE-CREDIT FRAMING

"Hey [Name], you have store credit waiting" outperforms a plain discount.

THE LEVERS HERE

OFFER + TIMING.
TEST AT 3× THE REPEAT-PURCHASE INTERVAL.

SECTION 07

OFFERS — THE BIGGEST LEVER

07

2×

OFFER FRAMING IS THE ONLY TEST THAT CAN DOUBLE REVENUE.

Send timing and subject lines produce lifts. Offers produce step-changes. Treat the offer as the most important variable you own.

PREMIUM = NO DISCOUNT

Use new-product drops as the reason to buy. Lean on free gifts, bundles, bonuses over price cuts.

PROTECT OFFER EQUITY

A weak gift-with-purchase dilutes every future offer. Only attach gifts you'd be proud to sell.

PRESSURE-TEST EARLY

Run offers head-to-head on 10–20% cohorts: $20 cash back vs. BOGO vs. free gift vs. 10% off.

SECTION 08

SURVEYS & SEGMENTATION

08

SURVEY LONG-TENURED BUYERS

Ask people active ~6 months a battery of questions. The answers surface LTV drivers you'd never guess.

REFRESH SEGMENTS ON A SCHEDULE

When did you last update who you send to? Build sharper segments — e.g. 3×+ purchasers.

THE CLASSIC EXAMPLE

One brand surveyed its list and found the customers who **put creatine in their coffee** had the highest LTV of all. You don't find that in a dashboard — you find it by asking.

SECTION 09

TESTING DISCIPLINE

09

Solve for lift, not vibes. Every test ties back to a profit goal — and you ask whether the win is worth the effort before you run it.

WHAT TO TEST · PRIORITY

01 **OFFERS** — can double revenue

02 **SEND TIMING** — reliable lift

03 **SUBJECT LINES** — easy lift

04 **FORMAT** — text vs image

THE HOLDOUT



Withhold the email from a random 10%. If the 90% isn't more profitable, the email is just noise.

CADENCE

Add one email/week, run 2 months, hold out 50%. No incremental profit = you're just annoying people.

MIND THE CEILING

As you grow, over-sending compounds — deliverability and fatigue. Keep re-testing the limit.

SECTION 10

PREPARING FOR PEAK

10

40% of annual revenue can land in a few peak days. Set tests up **~6 months out** so you're ready ~3 months out — acquisition is harder every year, so retention carries the season.

THE SEVEN LEVERS

1. Profit-first testing
2. Pop-ups (~10 tests)
3. Send cadence
4. Offers on cohorts
5. Post-purchase & win-back
6. Segments
7. Creative & design

SECTION 11

DELIVERABILITY & DESIGN

11

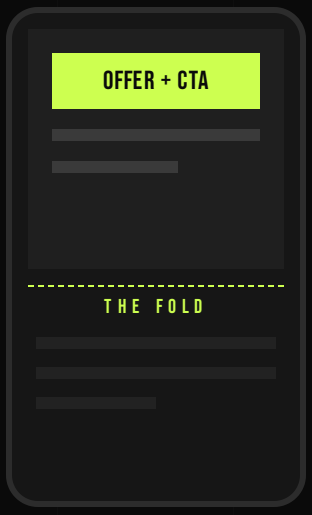
Don't copy big brands — their brand affinity lets them get away with sloppy. Keep it light, mobile-first, and genuinely engaging.

IMAGE SPECS

<200KB	<100KB
GIFs	STATIC IMAGES

- Compress everything; chunk tall images so they load on a spotty connection.
- Each month, sprinkle in engagement-only moments — providers reward real engagement.
- **AI inbox check:** paste your email image into an AI and ask it to summarize. Muddled summary = muddled email.

ABOVE THE FOLD



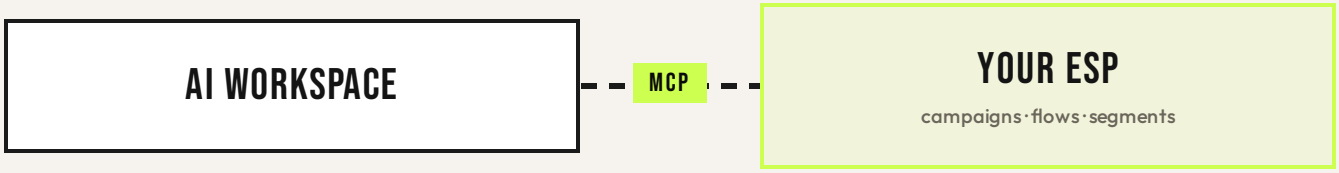
Offer at the top. If the CTA needs a scroll, it's too long.

SECTION 12

AI & THE EMAIL-PLATFORM MCP

12

The platforms caught up — **Klaviyo, Omnisend, and others now ship MCPs.** Wire your ESP straight into your AI workspace and it reads your live data instead of you exporting CSVs. Highest-leverage connection you can make.



READ-ONLY · DAY ONE

- *"How did campaigns & automations do vs. last week — what changed and why?"*
- *"What flows do I have, and which standard ones am I missing?"*
- *"Compare my flows to benchmarks — where am I below?"*
- *"Deliverability trend, last 4 weeks vs. prior 3-week avg — three sentences."*

ONCE YOU GRANT WRITE

- *"Find likely upsell buyers,* **build the segment**, *explain why it's worth targeting."* → *it creates it*
- *"From my top 90-day campaigns,* **draft the next one** *using patterns that worked."* → *usable draft in minutes*

START READ-ONLY

Let it read and explain before it touches anything. Grant write only once you trust it. It's your fastest junior analyst — not your replacement.

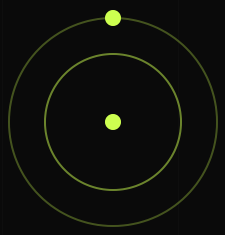
SECTION 13

QUICK-START CHECKLIST

13

A prioritized first pass — each item is concrete and testable.

01	☐	Switch Email 1 and all founder emails to **text-based**.
02	☐	Set up the **day-5 founder email** and the "why didn't you buy?" email.
03	☐	Audit your four abandonment flows; **A/B test the first subject line**.
04	☐	Build or confirm the **post-purchase timeline** (immediate → day 28).
05	☐	Stand up a **win-back flow** at ~3× the repeat-purchase interval.
06	☐	Start an **offer test** on a 10–20% cohort now (for peak).
07	☐	Run a **pop-up test** (close-button placement); commit to ~10 over six months.
08	☐	Pick one flow email and run a **10% holdout** to prove incremental profit.
09	☐	Tighten deliverability: **compress images**, offer above the fold, mobile QA.
10	☐	Connect AI **read-only** to your ESP and ask what deserves attention.



AD HOC MEDIA

Retention & lifecycle, run on profit — not vibes.

PRACTITIONER-FIRST · ALLERGIC TO HYPE