

Klaviyo for E-commerce — Workbook

This workbook turns the course into a working Klaviyo account. You will verify your data integration, build and document the four core flows, design predictive segments, plan a compliant SMS layer, and run your first A/B test. Work through one section per course module, then use the action plan and templates to keep your lifecycle program healthy.

Connecting Your Store and Reading the Data

Confirm your integration works, map your account, and learn to read the metrics that drive every later decision.

Exercise: Place a test order and trace it in the Activity Feed

Connect Shopify (or your platform), enable onsite tracking, then place a small real test order with a card you control. Open the profile it created and follow the events. Refund the order afterward and confirm the refund event lands.

- List every event that appeared on the test profile's Activity Feed, in order, with timestamps.

- Did both Started Checkout and Placed Order fire? If either is missing, what will you check first?

- Did onsite tracking produce a Viewed Product or Active on Site event? If not, is the klaviyo.js snippet enabled?

- What was the exact gap in minutes between Started Checkout and Placed Order, and why does that matter for cart-flow timing?

Worksheet: Account inventory and metric baseline

Fill in the current state of your account so you have a before snapshot to improve against. Pull the metric numbers from your last 90 days.

E-commerce platform (Shopify / WooCommerce / BigCommerce / other)

Integration status (Connected / Error) and last sync time

Onsite tracking enabled? (Y/N)

Number of active lists

Number of active segments

Number of live flows

Current account-wide open rate (last 90 days)

Current account-wide click rate (last 90 days)

Current account-wide placed-order rate (last 90 days)

Checklist: Integration health check

- Shopify (or platform) integration shows a green Connected status
- Onsite Javascript / klaviyo.js tracking is toggled on
- Started Checkout fires on a real test checkout
- Placed Order fires on a real test purchase
- Viewed Product or Active on Site fires from a normal browser session
- A test order was refunded and a Refunded Order event appeared

The Four Flows That Make the Money

Build the welcome, abandoned-cart, post-purchase and winback flows with correct triggers, delays and exit filters.

Exercise: Map your four flows before you build them

On paper, sketch each of the four flows as a sequence of messages with triggers, wait times and exit filters. Decide where (if anywhere) a discount appears. Then build them in Klaviyo from your sketch.

- For the welcome flow: what is the trigger, and what code or offer does email 1 deliver?
- For the abandoned-cart flow: are you triggering on Started Checkout or Added to Cart, and why?
- For the post-purchase flow: where do you place the review request relative to expected delivery?
- For the winback flow: how many days without a purchase counts as lapsed for YOUR store, based on your reorder gap?

Worksheet: Flow build specification

Document each flow's structure so you (or a teammate) can rebuild or audit it later. Complete one block per flow.

Flow name

Trigger (event or segment)

Message 1 channel, delay and purpose

Message 2 channel, delay and purpose

Message 3 channel, delay and purpose

Exit / flow filter condition

Does this flow include a discount? (Y/N) and at which message

Conditional splits used (first-time vs repeat, VIP, etc.)

Checklist: Flow launch checklist

- Welcome flow triggers on newsletter list join and email 1 delivers the promised code immediately
- Abandoned-cart flow triggers on Started Checkout with dynamic cart contents
- Abandoned-cart flow has a filter to skip anyone who has Placed Order since starting
- Post-purchase flow triggers on Placed Order and times the review request after expected delivery
- Replenishment timing (if applicable) is set just before the product runs out
- Winback flow uses a lapsed threshold based on your real reorder gap
- Every flow has an exit filter so buyers are not nagged after purchasing
- All four flows are switched to Live, not Draft or Manual

Segmentation and Predictive Analytics

Build behaviour-based segments, plan predictive segments, and design dynamic, personalised content.

Worksheet: Core segment definitions

Define the segments your store will keep on hand. Write each definition in plain conditions you can replicate in the segment builder.

Engaged segment definition (event + timeframe, e.g. opened or clicked email in last 90 days)

VIP segment definition (spend or order-count threshold)

Category-interest segment definition (viewed or purchased which product line)

New-subscriber-not-purchased segment definition

Sunset / unengaged segment definition (no engagement in how many days)

Exercise: Plan your predictive segments

Check whether predictive fields are available on your profiles. If they are, build the segments below; if your store is too new, note the behavioural stand-in you will use until predictions switch on.

- Are predicted CLV, churn risk and expected-next-order fields available on your profiles yet? (Y/N)
 - What dollar threshold defines your high predicted-CLV segment, and what perk will it receive?
 - How will you route high churn-risk customers (which flow or message)?
 - If predictions are not available yet, which behavioural segment will you use in the meantime?
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Checklist: Segmentation and personalisation checklist

- An engagement segment exists and is set as your default campaign audience
- A VIP segment exists with a clear threshold from your own data
- At least one category-interest segment exists
- Predictive segments are built, or a behavioural stand-in is documented
- First-name personalisation has a fallback value set
- An abandoned-cart email renders the actual cart items from the trigger event
- At least one conditional content block is used to avoid forking a flow

SMS, A/B Testing and Deliverability

Plan a compliant SMS layer, design a sound A/B test, and audit your deliverability and account health.

Worksheet: SMS layer and consent plan

Document how you will collect SMS consent and where SMS fits into your flows. This doubles as a compliance record.

SMS consent collection method (checkbox / text-to-join keyword)

Is SMS consent collected separately from email opt-in? (Y/N)

Sending number or short code registered? (Y/N)

Quiet hours window (local time)

Opt-out wording included in messages (e.g. reply STOP)

Which flow(s) get an SMS step and at what delay

High-urgency moments reserved for SMS (cart expiry, flash sale, shipping)

Exercise: Design and run your first A/B test

Pick one flow message or campaign to test. Form a single hypothesis, change exactly one variable, choose your deciding metric in advance, and run until the result is statistically significant.

- What is your one-sentence hypothesis (e.g. a benefit-led subject line beats a curiosity-led one)?

- What single variable changes between version A and version B?

- What is the deciding metric (open rate for subject lines; placed-order rate or revenue per recipient for offers)?

- What sample size or significance level will you wait for before declaring a winner, and what did the result turn out to be?

Worksheet: Deliverability and quarterly audit log

Record your authentication setup and the results of your most recent account audit.

Branded sending domain in use (e.g. mail.yourstore.com)

SPF record added? (Y/N)

DKIM record added? (Y/N)

DMARC policy in place? (Y/N)

Spam-complaint rate (last 90 days)

All flows confirmed Live and error-free? (Y/N)

Sunset/unengaged profiles suppressed this quarter? (Y/N)

One improvement to test next quarter

Checklist: Compliance, testing and deliverability checklist

- SMS marketing only sends to profiles with explicit SMS consent
- Quiet hours are configured to the recipient's local time
- Opt-out (reply STOP) wording is present in SMS messages
- Each A/B test changes only one variable
- The deciding metric was chosen before the test launched
- Winners are only declared after statistical significance or an adequate sample
- Sending domain has SPF and DKIM authenticated
- Unengaged profiles are sunset to protect sender reputation

Your Action Plan

1. Connect your store, enable onsite tracking, and verify Started Checkout and Placed Order with a real test order in the Activity Feed.
2. Build the welcome flow: trigger on list join, deliver the code in email 1, add the brand-story and social-proof follow-ups, and add a purchase exit filter.
3. Build the abandoned-cart flow on Started Checkout with three messages at roughly 1, 24 and 48 hours and a Placed-Order exit filter.
4. Build the post-purchase flow on Placed Order with onboarding, a review request timed after delivery, and a cross-sell or replenishment nudge.
5. Build the winback flow on your real reorder gap with an escalating offer and a last-chance message.
6. Create your core segments: engaged, VIP, category-interest, and a sunset segment for unengaged profiles.
7. Add predictive segments (CLV, churn risk, next-order) if available, or document behavioural stand-ins until they switch on.
8. Collect explicit SMS consent, set quiet hours, and add an SMS step to your highest-urgency flow.
9. Run one A/B test that changes a single variable and wait for statistical significance before rolling out the winner.
10. Authenticate your sending domain with SPF and DKIM, then schedule a recurring quarterly audit of flows, tracking, segments and deliverability.

