

Building The Segment For Your Flow

3 Emails + 3 SMS (Email 1, SMS 1, 2 day pause, Email 2, SMS 2, 2 day pause, Email 3, SMS 3)

Step 1: Click Segments on the left side of the screen

The screenshot shows the Klaviyo dashboard interface. On the left is a navigation sidebar with categories like Home, Campaigns, Flows, Reviews, Sign-up forms, Audience, Growth tools, Lists & segments, Profiles, Content, Templates, Products, Images & brand, Coupons, Analytics, Dashboards, and Experiments. The main content area is titled 'Conversion metric' and shows 'Active on Site' for the time period 'Dec 17, 2023 - Jan 16, 2024 compared to previous period'. Below this is a 'Business performance summary' card with two key metrics: '5,712 Total conversions' (up 17% vs. previous period) and '1,936 Attributed conversions (33.89% of total)' (up 43% vs. previous period). A 'View dashboard' button is present. Underneath is an 'Attributed conversions' table:

Conversion rate	Campaigns	Flows	Email	SMS
2.13%	293 15.13%	1,643 84.87%	1,905 98.40%	31 1.60%

Below the table is a 'Top performing flows' section for the same time period, with a 'View all flows' button. It contains a table of flow performance:

Flow	Status	Type	Deliveries	Active on Site	Percent change
Welcome Series Added to Newsletter list	Live	A/B	35,980	900 2.50% of recipients	82.56%
Browse Abandonment Viewed Product	Live	A/B	2,800	172 6.14% of recipients	20.28%
Post Purchase - Alignment Disc Placed Order	Live		1,608	130 8.08% of recipients	124.14%
Pressure Plate List - Welcome Flow	Live	A/B	1,476	119 8.06% of recipients	124.14%

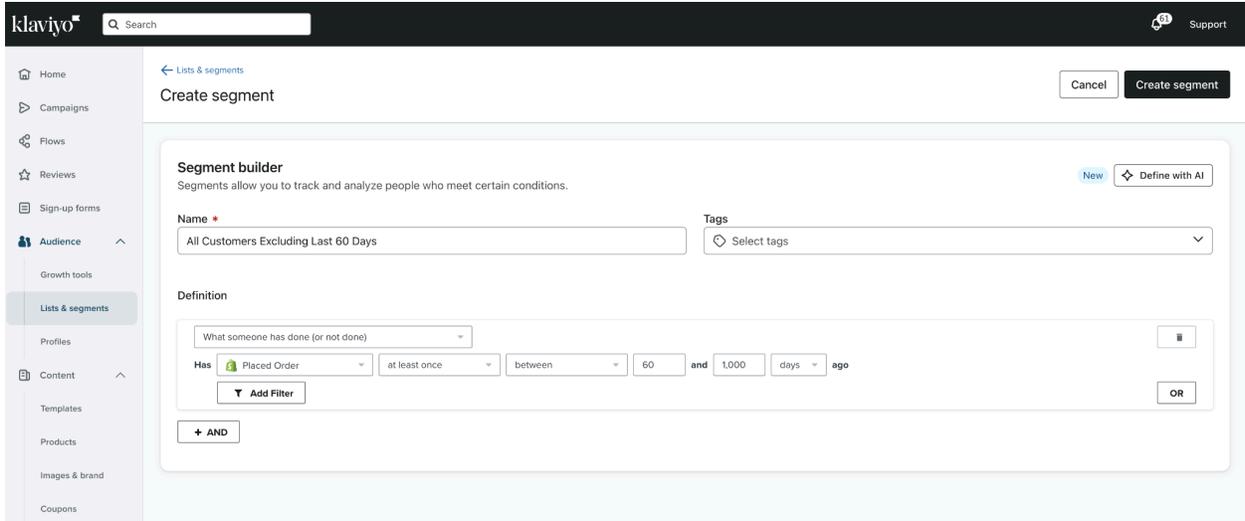
Step 2: Click Create New at the top right of the screen and then click Create Segment within the dropdown menu

The screenshot shows the Klaviyo 'Lists & Segments' page. At the top right, there is a 'Create New' button. A dropdown menu is open from this button, showing two options: 'Create list' (Static list of profiles) and 'Create segment' (Dynamic group based on defined properties). The main content area is a table of existing lists and segments. The table has columns for Name, Type, Member count, and Date. The first row is a 'List' named '2023 Top 100 Retreat' with 108 members. The following rows are 'Segments' created '30 days before the recent window' with various member counts and dates.

Name	Type	Member	Date
2023 Top 100 Retreat	List	108	Dec 15, 2023, 2:26 pm
Acquired 30 days before the recent window (330 - 610 Day Window)	Segment	700	Nov 30, 2023, 9:44 am
Acquired 30 days before the recent window (300 - 480 Day Window)	Segment	619	Nov 30, 2023, 9:43 am
Acquired 30 days before the recent window (270 - 450 Day Window)	Segment	453	Nov 30, 2023, 9:40 am
Acquired 30 days before the recent window (240 - 420 Day Window)	Segment	452	Nov 30, 2023, 9:38 am
Acquired 30 days before the recent window (180 - 360 Day Window)	Segment	610	Nov 30, 2023, 9:36 am
Acquired 30 days before the recent window (210 - 390 Day Window)	Segment	654	Nov 30, 2023, 9:34 am
Acquired 30 days before the recent window (150 - 330 Day Window)	Segment	1215	Nov 30, 2023, 9:31 am
Acquired 30 days before the recent window (120 - 300 Day Window)	Segment	980	Nov 30, 2023, 9:29 am
Acquired 30 days before the recent window (90 - 270 Day window)	Segment	554	Nov 30, 2023, 9:27 am

Step 3: Set up the segment

- Select from the dropdown menu "What someone has done (or not done)"
- Select from the next dropdown menu "Placed Order"
- Select from the next dropdown menu "at least one"
- Select from the next dropdown menu "between"
- Input 60 and 1,000 if you're looking to exclude the last 60 day purchasers. If you were to only exclude the last 30, you'd input 30 and 1000 here.
- Name: *All Customers Excluding Last 60 Days*



Step 4: Click Create Segment. From here, your segment should populate with users that will receive the flow we're going to send out



We're finding people who belong in this segment...

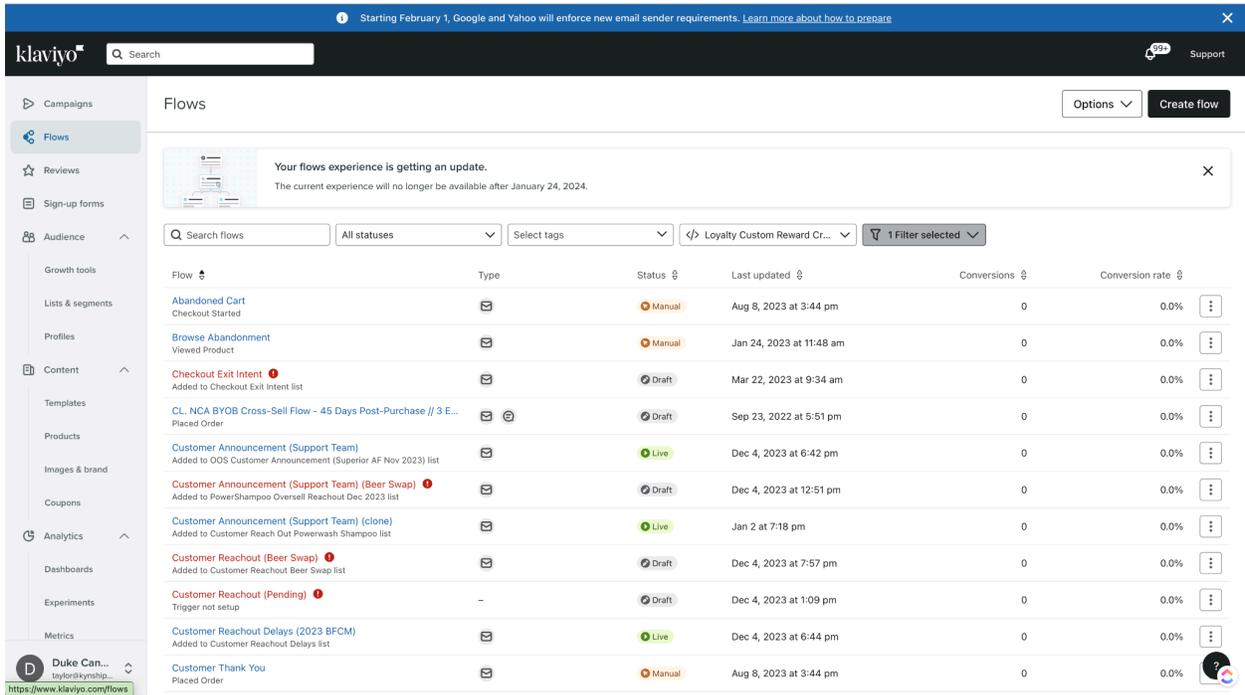


Hang tight! This process can take a few minutes.

- Queued for processing
- Finding profiles
- Adding profiles to segment
- Done!

Building The Flow

Step 1: Click Flows at the top left of the screen



Starting February 1, Google and Yahoo will enforce new email sender requirements. [Learn more about how to prepare](#)

klaviyo Search Support

Campaigns Flows Options Create flow

Your flows experience is getting an update.
The current experience will no longer be available after January 24, 2024.

Search flows All statuses Select tags Loyalty Custom Reward Cr... 1 Filter selected

Flow	Type	Status	Last updated	Conversions	Conversion rate
Abandoned Cart Checkout Started	✉	Manual	Aug 8, 2023 at 3:44 pm	0	0.0%
Browse Abandonment Viewed Product	✉	Manual	Jan 24, 2023 at 11:48 am	0	0.0%
Checkout Exit Intent Added to Checkout Exit Intent list	✉	Draft	Mar 22, 2023 at 9:34 am	0	0.0%
CL. NCA BYOB Cross-Sell Flow - 45 Days Post-Purchase // 3 E... Placed Order	✉	Draft	Sep 23, 2022 at 5:51 pm	0	0.0%
Customer Announcement (Support Team) Added to OOS Customer Announcement (Superior AF Nov 2023) list	✉	Live	Dec 4, 2023 at 6:42 pm	0	0.0%
Customer Announcement (Support Team) (Beer Swap) Added to PowerShampoo Oversell Reachout Dec 2023 list	✉	Draft	Dec 4, 2023 at 12:51 pm	0	0.0%
Customer Announcement (Support Team) (clone) Added to Customer Reach Out Powershampoo list	✉	Live	Jan 2 at 7:18 pm	0	0.0%
Customer Reachout (Beer Swap) Added to Customer Reachout Beer Swap list	✉	Draft	Dec 4, 2023 at 7:57 pm	0	0.0%
Customer Reachout (Pending) Trigger not setup	-	Draft	Dec 4, 2023 at 1:09 pm	0	0.0%
Customer Reachout Delays (2023 BFCM) Added to Customer Reachout Delays list	✉	Live	Dec 4, 2023 at 6:44 pm	0	0.0%
Customer Thank You Placed Order	✉	Manual	Aug 8, 2023 at 3:44 pm	0	0.0%

Duke Can...
layof@kynship...
<https://www.klaviyo.com/flows>

Step 2: Click Create Flow at the top right of the screen

The screenshot shows the Klaviyo 'Flows' management interface. At the top right, there is a 'Create flow' button. Below it, a notification banner states: 'Your flows experience is getting an update. The current experience will no longer be available after January 24, 2024.' Below the notification, there are search and filter options. The main area contains a table of existing flows:

Flow	Type	Status	Last updated	Conversions	Conversion rate
Abandoned Cart Checkout Started	✉	Manual	Aug 8, 2023 at 3:44 pm	0	0.0%
Browse Abandonment Viewed Product	✉	Manual	Jan 24, 2023 at 11:48 am	0	0.0%
Checkout Exit Intent Added to Checkout Exit Intent list	✉	Draft	Mar 22, 2023 at 9:34 am	0	0.0%
CL, NCA BYOB Cross-Sell Flow - 45 Days Post-Purchase // 3 E... Placed Order	✉	Draft	Sep 23, 2022 at 5:51 pm	0	0.0%
Customer Announcement (Support Team) Added to DOS Customer Announcement (Superior AF Nov 2023) list	✉	Live	Dec 4, 2023 at 6:42 pm	0	0.0%
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Customer Announcement (Support Team) (clone) Added to Customer Reach Out Powerwash Shampoo list	✉	Live	Jan 2 at 7:18 pm	0	0.0%
Customer Reachout (Beer Swap) Added to Customer Reachout Beer Swap list	✉	Draft	Dec 4, 2023 at 7:57 pm	0	0.0%
Customer Reachout (Pending) Trigger not setup	-	Draft	Dec 4, 2023 at 1:09 pm	0	0.0%
Customer Reachout Delays (2023 BFCM) Added to Customer Reachout Delays list	✉	Live	Dec 4, 2023 at 6:44 pm	0	0.0%
Customer Thank You Placed Order	✉	Manual	Aug 8, 2023 at 3:44 pm	0	0.0%

Step 3: Click Create From Scratch at the top right of the screen

The screenshot shows the Klaviyo 'Create Flow' page. At the top right, there is a 'Create From Scratch' button. Below it, there are search and filter options. The main area is titled 'Start with the essentials' and features several flow templates:

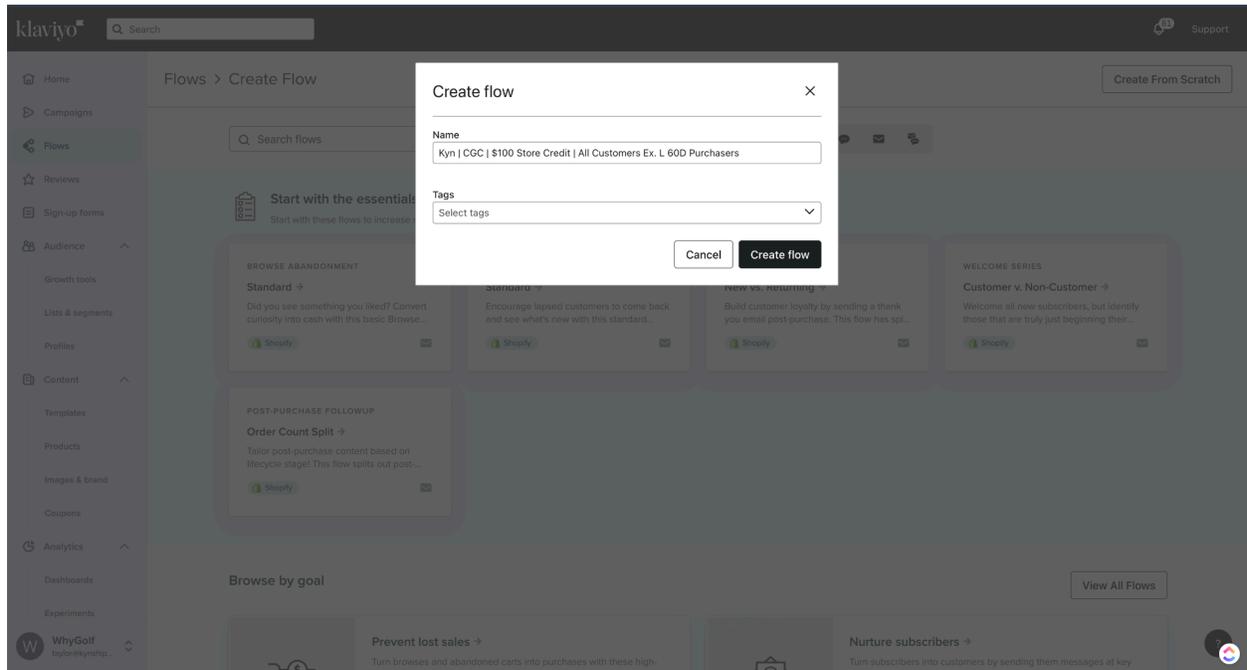
- BROWSE ABANDONMENT** (Standard): Did you see something you liked? Convert curiosity into cash with this basic Browse...
- CUSTOMER WINBACK** (Standard): Encourage lapsed customers to come back and see what's new with this standard...
- CUSTOMER THANK YOU** (New vs. Returning): Build customer loyalty by sending a thank you email post-purchase. This flow has spl...
- WELCOME SERIES** (Customer v. Non-Customer): Welcome all new subscribers, but identify those that are truly just beginning their...
- POST-PURCHASE FOLLOWUP** (Order Count Split): Tailor post-purchase content based on lifecycle stage! This flow splits out post...

Below the templates, there is a 'Browse by goal' section with two options:

- Prevent lost sales**: Turn browses and abandoned carts into purchases with these high...
- Nurture subscribers**: Turn subscribers into customers by sending them messages at key...

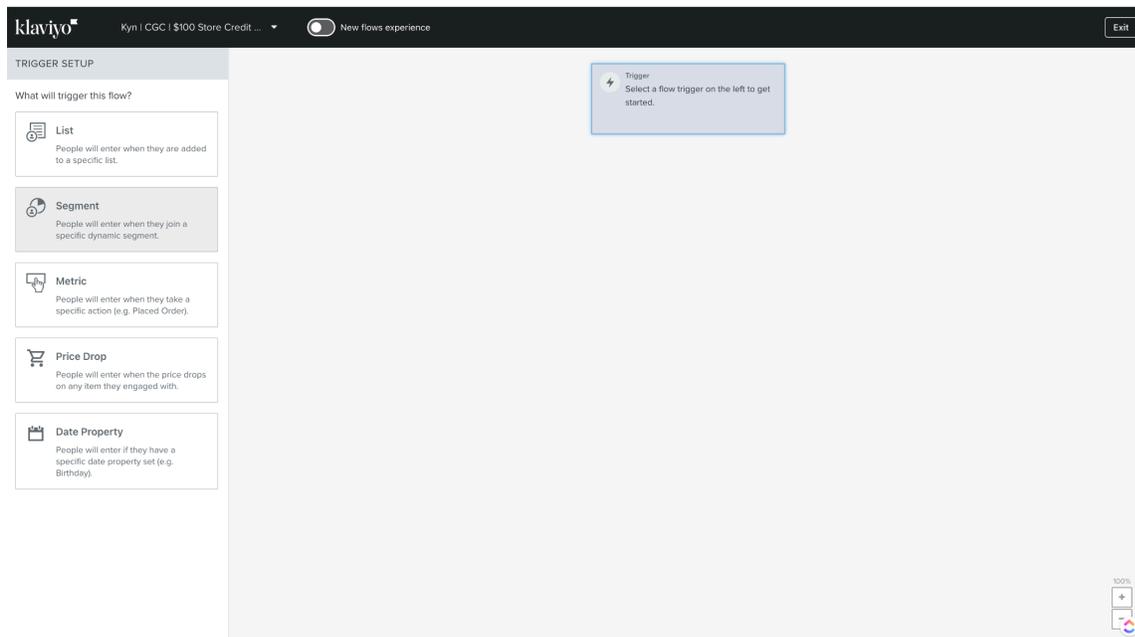
Step 4: Name the flow & click Create Flow

- “Kyn | CGC | \$100 Store Credit | All Customers Ex. L 60D Purchasers”

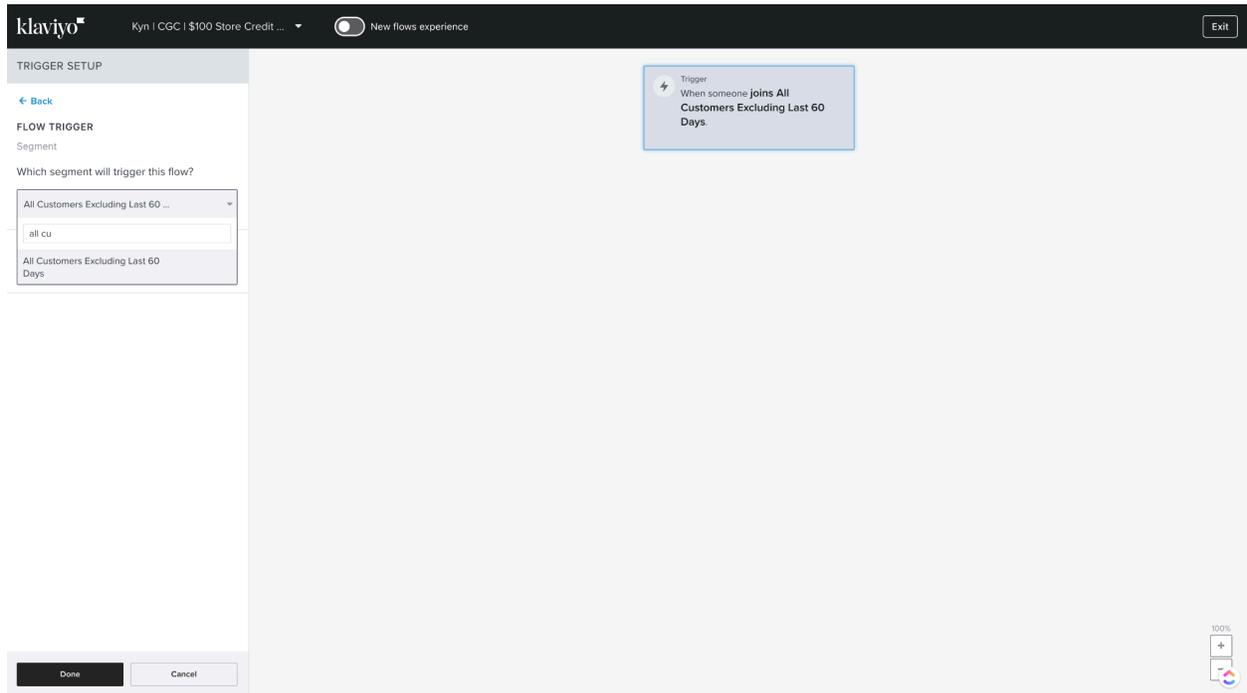


Step 5: Set up the flow trigger by clicking segment on the left

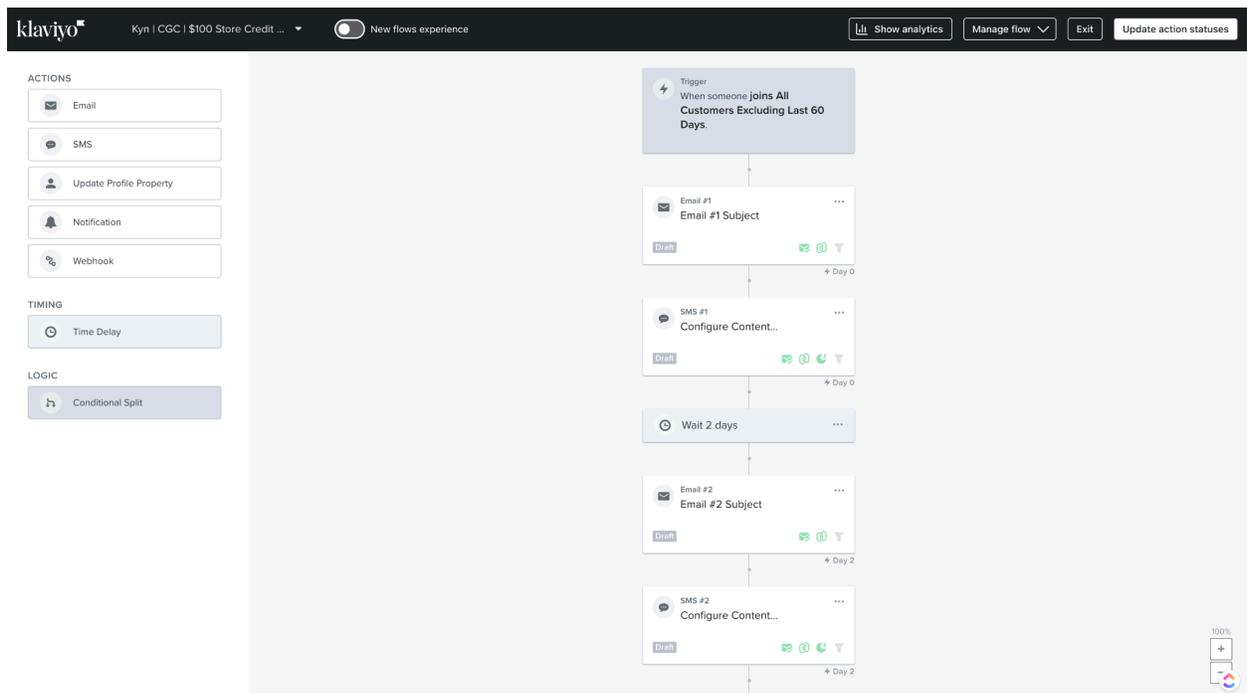
**Updated to right side - Go to 'Added to Segment'



Step 6: Select the segment built out for this flow. Once selected, click save at the bottom of the screen.



Step 7: Build the skeleton of your flow.



Step 8: Input copy into each of the three emails and text (SMS messages)

klaviyo Kyn | CGC | \$100 Store Credit | All Customers Ex. L 60D Purchasers Done

Email #1 Draft Switch message

Message content Overview Recipient activity Link activity Deliverability Watch live

Flow content

Name
Email #1

Subject line
Email #1 Subject

Preview text

For this template type, preview text will be pulled by default from the start of the email. [Learn more](#)

Sender name
WhyGolf Team

Sender email address
info@whygolf.com

Use this as your reply-to address

+ Add CC + Add BCC

+ Create A/B Test
Test content to optimize your email.

FROM: WhyGolf Team <info@whygolf.com>
SUBJECT: Email #1 Subject

Hi there (name),

It's me, Brad Mason,
Founder of WhyGolf.

Hope you're enjoying your training aids - I've got a proposition for you.

It's no secret that we put a premium on authenticity.

This is why, instead of using polished models or actors, we want to showcase REAL customers in our content.

True stories from real golfers, sharing their genuine experiences with our products, make the most compelling tales.

Step 9: Input email subject lines and the names

Get \$100 For Your Review Draft Switch message

Message content Overview Recipient activity Link activity Deliverability Watch live

Flow content

Name
Get \$100 For Your Review

Subject line
Get \$100 For Your Review

Preview text

For this template type, preview text will be pulled by default from the start of the email. [Learn more](#)

Sender name
WhyGolf Team

Sender email address
info@whygolf.com

Use this as your reply-to address

+ Add CC + Add BCC

+ Create A/B Test
Test content to optimize your email.

FROM: WhyGolf Team <info@whygolf.com>
SUBJECT: Get \$100 For Your Review

Hi there (name),

It's me, Brad Mason,
Founder of WhyGolf.

Hope you're enjoying your training aids - I've got a proposition for you.

It's no secret that we put a premium on authenticity.

This is why, instead of using polished models or actors, we want to showcase REAL customers in our content.

True stories from real golfers, sharing their genuine experiences with our products, make the most compelling tales.

Step 10: Double check that “Smart Sending” is turned off for every email & SMS and that quiet hours are all correctly timed.

Step 11: Get final approval from the brand to launch once the flow is completely build out

Step 12: Click review and turn on to take the flow live!

Step 13: Click Manage Profiles -> Add Past Profiles -> At The Beginning ->Add Profiles