

# Klaviyo Email + SMS for Ecommerce Brands

The Complete 2026 Strategy Guide

**The flows, segments, and send strategy that turn one-time buyers into repeat customers**

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## WHAT'S INSIDE:

- Why email and SMS are your highest-ROAS ecommerce channels
- Klaviyo account setup and Shopify integration
- The 7 flows every ecommerce brand needs
- SMS strategy: when to use it and how to do it right
- List segmentation for smarter sends
- Campaign strategy: broadcasts vs automated flows
- Deliverability: how to protect your sender reputation
- Measuring performance and scaling what works

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## SECTION 01

Why Email and SMS Are Your Highest-ROAS Channels

### Why Email and SMS Are Your Highest-ROAS Channels

Email and SMS are the only paid-feeling channels where you own the audience. Every dollar you spend on Meta or Google rents attention from a platform that can change its algorithm, raise its prices, or suspend your account tomorrow. Your email and SMS list is yours. It compounds in value every month and costs a fraction of what paid media costs per conversion.

For ecommerce brands, email consistently delivers the highest ROAS of any marketing channel -- averaging \$36 to \$45 in revenue per \$1 spent according to Klaviyo's own benchmarks. SMS performs differently: lower volume, higher urgency, and open rates above 90%. Used together, they create a retention engine that keeps customers buying without relying entirely on paid acquisition.

#### Email and SMS benchmarks for ecommerce:

Metric	Email	SMS
Average open rate	35% to 45% for well-segmented lists	90% or higher -- most texts are read
Average click rate	2% to 4% for broadcast emails	10% to 20% for SMS with link
Average ROAS	\$36 to \$45 per \$1 spent (Klaviyo benchmark)	Lower ROAS but highest urgency response
Best use case	Nurture, education, relationship-building	Flash sales, restock alerts, time-sensitive offers
Frequency tolerance	2 to 4 times per week for engaged segments	2 to 4 times per month maximum
Subscriber acquisition	Pop-ups, lead magnets, checkout opt-in	SMS-specific pop-ups, keyword opt-ins

#### KEY INSIGHT

A customer who buys once is 60 to 70% more likely to buy again than a cold prospect. Your email and SMS list is your highest-value owned asset. Every post-purchase flow, replenishment reminder, and win-back sequence is revenue that does not require a single dollar of paid spend.

## SECTION 02

### Klaviyo Setup and Shopify Integration

## Klaviyo Setup and Shopify Integration

Klaviyo is the email and SMS platform built specifically for ecommerce. Its native Shopify integration syncs order history, product catalog, customer lifetime value, and predictive analytics directly into your sending platform -- enabling personalization and segmentation that generic email tools cannot match.

### Initial setup steps:

- 1. Create your Klaviyo account:** at klaviyo.com. Select Ecommerce as your business type during setup.
- 2. Install the Klaviyo app in Shopify:** Go to the Shopify App Store, install Klaviyo: Email Marketing and SMS. Authorize the connection. Klaviyo will begin syncing your customer and order data immediately.
- 3. Verify your sending domain:** Add a custom sending domain (email.yourdomain.com) in Klaviyo under Settings > Email > Sending domains. This is required for good deliverability. Follow Klaviyo's DNS record instructions exactly.
- 4. Set up your brand identity:** Upload your logo, set brand colors, and configure your default sender name and reply-to address under Account > Settings. Every email template inherits these settings.
- 5. Configure your SMS sending number:** For SMS, Klaviyo assigns a dedicated sending number or toll-free number. Complete the A2P 10DLC registration required for US SMS sending. This process takes 3 to 5 business days.
- 6. Import your existing list:** If you have an existing email list, import it as a CSV. Tag imports by source so you can segment them from organic Klaviyo subscribers. Suppress any known unsubscribes.
- 7. Install the Klaviyo web tracking snippet:** Klaviyo's JavaScript snippet enables on-site tracking of page views, product views, and cart activity. This data powers cart abandonment and browse abandonment flows. Shopify app installation handles this automatically.

### What Klaviyo syncs from Shopify automatically:

Data Point	What It Enables in Klaviyo
Order history	Purchase-based segmentation, RFM analysis, replenishment timing
Product catalog	Dynamic product blocks in emails, cross-sell recommendations
Customer lifetime value	LTV-based segmentation and VIP identification
Predicted next order date	Replenishment flow timing, win-back sequencing
Cart and checkout events	Abandoned cart and checkout abandonment flows

Data Point	What It Enables in Klaviyo
Browse events	Browse abandonment flows for high-intent site visitors

## SECTION 03

The 7 Flows Every Ecommerce Brand Needs

### The 7 Flows Every Ecommerce Brand Needs

Flows are automated email and SMS sequences triggered by customer behavior. They run in the background 24 hours a day, sending the right message at the right moment without any manual work after setup. These 7 flows cover the full customer lifecycle from first visit to long-term retention and account for the majority of Klaviyo-attributed revenue for most ecommerce brands.

#### Welcome Series

Trigger: new email subscriber (not a purchaser)

Your first impression with a non-buyer. The goal is to introduce your brand, build trust, and move the subscriber toward their first purchase.

Email 1 -- Day 0	Welcome and brand story. Deliver any promised lead magnet. Include a first-purchase discount if your margins allow.
Email 2 -- Day 2	Your bestsellers or most-reviewed products. Social proof heavy. Let customers speak.
Email 3 -- Day 4	Address the most common objection to buying. Shipping policy, return policy, quality story.
Email 4 -- Day 7	Urgency close. If you offered a discount in Email 1, remind them it expires. If not, introduce a compelling offer.

#### TIP

Split your welcome series by acquisition source. Someone who downloaded a buying guide needs different emails than someone who signed up during checkout. Tag by source and build separate flows.

#### Abandoned Cart

Trigger: item added to cart, checkout not completed, 1 to 4 hours elapsed

The highest-revenue flow for most ecommerce brands. These shoppers were close. They just need a nudge.

Email 1 -- 1 hour	Simple reminder. Show the exact cart items with images. No discount yet -- many people just got distracted.
Email 2 -- 24 hours	Address hesitation. Feature reviews for the abandoned product. Answer the most common objection.
Email 3 -- 48 to 72 hours	Incentive close. Offer a small discount or free shipping if margins allow. Create urgency around stock.

#### TIP

Add an SMS message at the 30-minute mark before your first email. SMS abandoned cart messages achieve open rates above 90% and recover a meaningful share of carts that email alone misses.

## Post-Purchase Onboarding

Trigger: first order placed

The most underused flow in ecommerce. Most brands send an order confirmation and go silent. The post-purchase window is when trust is highest and a second purchase is most likely.

<b>Email 1 -- Day 0</b>	Order confirmation with product care instructions or setup guide. Make the customer feel they made the right choice.
<b>Email 2 -- Day 3</b>	Usage tips, how-to content, or inspiration for using the product. Reduce buyer's remorse.
<b>Email 3 -- Day 7</b>	Review request. Time this to when the product has arrived and been used. Link directly to your review platform.
<b>Email 4 -- Day 14</b>	Cross-sell recommendation based on what they bought. Use Klaviyo's predictive product blocks.

### TIP

Personalize Email 1 using the specific product purchased, not a generic "thanks for your order." Klaviyo's dynamic blocks pull product name, image, and category directly from the order data.

## Browse Abandonment

Trigger: product page viewed, no add to cart, site exited

Catches high-intent visitors who looked but did not act. Lower volume than cart abandonment but strong signal -- someone who views a product page multiple times is actively considering.

<b>Email 1 -- 4 to 6 hours</b>	Show the viewed product. Include a key benefit or differentiator they may have missed.
<b>Email 2 -- 24 hours</b>	Social proof for the viewed product. Reviews, star ratings, or "X people bought this this week."

### TIP

Only trigger browse abandonment for subscribers who have viewed the same product 2 or more times. Single views are often accidental. Multiple views signal genuine consideration.

## Replenishment

Trigger: predicted reorder date based on purchase history

Relevant for consumable products -- supplements, skincare, coffee, cleaning supplies, pet food. Klaviyo predicts when a customer is likely to run out and triggers a reorder reminder before they search for alternatives.

<b>Email 1 -- 7 days before predicted run-out</b>	Friendly reminder that they are likely running low. Easy one-click reorder.
<b>Email 2 -- 1 day before</b>	Last chance reminder. Include a small loyalty offer if it is their third or more order.
<b>SMS -- day of</b>	Single SMS: "Running low on [product]? Reorder in one tap: [link]"

### TIP

Set replenishment timing based on your product's actual consumption rate, not a generic 30-day window. A 30-serving supplement container used once daily runs out in 30 days. A 60-serving container runs out in 60. Get this wrong and your reminders arrive too early or too late.

## Win-Back

Trigger: no purchase in 60, 90, or 120 days (set based on your purchase frequency)

Lapsed customers cost significantly less to reactivate than cold prospects cost to acquire. A structured win-back flow is one of the highest-ROI automations available.

<b>Email 1 -- Day 60</b>	"We miss you" tone. Show what is new since their last purchase. No discount yet.
<b>Email 2 -- Day 75</b>	Introduce an offer. The discount should reflect the customer's LTV -- high-LTV customers deserve a better offer.
<b>Email 3 -- Day 90</b>	Final attempt. Stronger offer or different angle. If they do not respond, move to suppression.
<b>Email 4 -- Day 105</b>	Sunset email: "Should we stop sending you emails?" A yes response suppresses them. A click re-engages them.

### TIP

Do not win back every lapsed customer with a discount. High-LTV customers who bought three or more times and went quiet are worth a discount. First-time buyers who never repurchased may not be worth the margin cost.

## VIP and Loyalty

Trigger: customer reaches LTV threshold you define (e.g. 3 purchases or \$500 lifetime spend)

Your best customers deserve a different experience. VIP flows acknowledge loyalty, provide early access, and deepen the relationship before a competitor can steal it.

<b>Email 1 -- VIP welcome</b>	Acknowledge their status. Give them something tangible: early access, a gift, free shipping for life, or a named loyalty tier.
<b>Email 2 -- Exclusive offer</b>	VIP-only product launch or sale access 24 to 48 hours before the general list.
<b>Ongoing</b>	Quarterly VIP emails with exclusive content, new arrivals, or behind-the-scenes access.

### TIP

VIP customers refer more, return more, and forgive mistakes more readily than average customers. Invest in this segment disproportionately -- the ROI compounds.

## SECTION 04

### SMS Strategy for Ecommerce

## SMS Strategy for Ecommerce

SMS is not email with a shorter word count. It is a different channel with different expectations, different rules, and different use cases. Used correctly, SMS adds a high-urgency layer to your retention stack that email cannot match. Used incorrectly, it destroys trust faster than almost any other marketing mistake.

### When SMS works for ecommerce:

- Flash sales and 24-hour offers where urgency is genuine
- Back-in-stock alerts for products customers have been waiting for
- Restock reminders for consumables (see replenishment flow, Section 03)
- Abandoned cart recovery as a first-touch before email sequences begin
- Order shipping and delivery confirmations (transactional -- high open rate, high satisfaction)
- Loyalty and VIP early access notifications

### When SMS hurts your brand:

- Sending more than 4 times per month to the full list -- frequency above this drives unsubscribes rapidly
- Sending promotional SMS on nights and weekends without clear opt-in for that timing
- Using SMS for content that requires context -- long explanations, nuanced offers, or complex instructions
- Texting subscribers who only opted in for email -- always get explicit SMS consent separately
- Treating SMS as a backup channel for emails that did not perform

### SMS compliance requirements (US):

Requirement	What It Means in Practice
Explicit opt-in	Subscribers must actively opt in to SMS separately from email. A checkbox at checkout or a dedicated SMS pop-up is required. Pre-checked boxes are not compliant.
TCPA compliance	Obtain written consent before sending marketing SMS. Keep records of opt-in method and timestamp.
A2P 10DLC registration	Register your brand and campaign use case with The Campaign Registry via Klaviyo before sending at scale. Required for US SMS marketing.

Requirement	What It Means in Practice
Opt-out on every message	Every SMS must include an opt-out instruction. Klaviyo appends "Reply STOP to unsubscribe" automatically.
Sending hours	TCPA restricts marketing SMS to 8am to 9pm in the recipient's local time zone. Klaviyo's Quiet Hours feature enforces this automatically.

**KEY INSIGHT**

Build your SMS list separately from your email list. SMS subscribers are a high-value segment who have given you a more intimate channel. Treat it accordingly. A smaller, highly engaged SMS list outperforms a large, disengaged one on every metric that matters.

## SECTION 05

### List Segmentation

## List Segmentation

Segmentation is the single biggest lever in email marketing performance. Sending the same email to your entire list is the fastest way to train your subscribers to ignore you -- and to damage your sender reputation with mailbox providers. The brands with the highest email ROAS are not sending more emails -- they are sending more relevant emails.

### The core segments every ecommerce brand should build:

<b>Engaged subscribers (90 days)</b>	Opened or clicked an email in the last 90 days. This is your primary broadcast audience. Protect this segment's health above all others.
<b>Engaged subscribers (30 days)</b>	Opened or clicked in the last 30 days. Your hottest audience. Use for time-sensitive offers and new product launches.
<b>Unengaged (91 to 180 days)</b>	No opens or clicks in 91 to 180 days. Send re-engagement campaigns before moving to sunset. Do not include in regular broadcasts.
<b>First-time buyers</b>	Placed exactly one order. Prioritize for cross-sell and repeat purchase nurture. This segment moving to two-time buyers is your most valuable conversion.
<b>Multi-purchase customers</b>	Placed two or more orders. More receptive to upsells, new arrivals, and loyalty offers. Higher LTV floor than one-time buyers.
<b>VIP customers</b>	Your top LTV tier -- define by purchase count, total spend, or both. Receive exclusive access, best offers, and personalized communications.
<b>Lapsed customers (60 to 90 days)</b>	Purchased at least once but not in 60 to 90 days. Primary win-back audience. Do not apply the same discount to all -- segment by LTV.
<b>High-intent non-purchasers</b>	Opened 3 or more emails but never purchased. Strong interest, unconverted. Audience for targeted social proof and offer sequences.
<b>Product category buyers</b>	Purchased from a specific category. Use for category-specific new arrivals, restocks, and cross-category recommendations.

**TIP**

Never send a broadcast campaign to your full list. Always suppress unengaged subscribers (90 days or more with no opens). Sending to unengaged subscribers tanks your open rate, trains mailbox providers to filter your emails, and wastes spend on subscribers who have already checked out.

## SECTION 06

Campaign Strategy: Broadcasts vs Flows

### Campaign Strategy: Broadcasts vs Flows

Klaviyo separates automated flows (triggered by behavior) from campaigns (manually scheduled broadcasts). Understanding when to use each -- and how to build a calendar that balances both -- is what keeps your list engaged without burning it out.

#### Flows vs campaigns at a glance:

	Flows	Campaigns
Trigger	Customer behavior (cart, purchase, browse, date)	Manual send -- you choose when
Timing	Automated -- runs without you	Requires planning and scheduling
Personalization	Very high -- pulls from customer data	Moderate -- segment-based
Revenue contribution	Typically 30 to 50% of Klaviyo revenue	Typically 50 to 70% of Klaviyo revenue
Effort after setup	Low -- set and iterate	High -- ongoing content creation
Best for	Lifecycle moments (welcome, post-purchase, win-back)	Promotions, launches, newsletters, seasonal

#### Broadcast campaign calendar framework:

Plan your broadcast calendar around four campaign types, balanced across the month:

**Value content (1 to 2 per month):** Educational content, buying guides, how-to content. No sell. Builds trust and keeps unengaged segments from lapsing.

**New arrivals or product spotlight (1 to 2 per month):** Feature new or underexposed products. Let customer reviews lead. Include a clear product CTA.

**Promotional (1 to 2 per month):** Sales, offers, free shipping thresholds. Send to engaged segments only. Do not promote to your full list every send.

**Seasonal or event-driven (as needed):** Q4, Black Friday, Valentine's Day, Mother's Day, product launches. Plan at least 30 days ahead for major seasons.

#### Send frequency guidelines:

Segment	Recommended Frequency	Notes
Engaged (30 days)	3 to 4 emails per week	Most receptive -- can handle higher frequency
Engaged (90 days)	2 to 3 emails per week	Healthy core audience -- standard send cadence
Unengaged (91 to 180 days)	Re-engagement only	Do not include in regular broadcasts
VIP customers	2 to 3 per week plus exclusive sends	Add VIP-only campaign touchpoints
SMS -- all segments	2 to 4 times per month	Never more than 1 per week except Q4

## SECTION 07

### Email Deliverability

## Email Deliverability

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An email that lands in spam is worth zero. Deliverability -- the ability to reach the inbox consistently -- is the foundation of everything else in email marketing. Most ecommerce brands ignore it until they have a problem. By then, recovering sender reputation can take months.

### The key deliverability factors:

**Sending domain authentication:** Set up SPF, DKIM, and DMARC records for your sending domain. Klaviyo provides the exact DNS records. Without these, your emails are more likely to be filtered or rejected by major mailbox providers.

**Engaged list hygiene:** Only send to subscribers who have opened or clicked in the last 90 to 180 days. Unengaged subscribers who never open drag down your engagement rate, which signals low-quality sending behavior to inbox providers.

**Bounce management:** Klaviyo automatically suppresses hard bounces. Monitor your bounce rate -- above 2% is a warning sign. Clean imported lists before sending to reduce initial bounce rates.

**Spam complaint rate:** Keep below 0.08% (Google's threshold as of 2024). Klaviyo tracks complaint rates. If you see spikes, audit your list acquisition methods and unsubscribe process.

**Consistent send volume:** Sudden volume spikes -- sending 50,000 emails to a list that normally receives 5,000 -- trigger spam filters. Warm up new sending domains and scale volume gradually.

**Unsubscribe process:** Make unsubscribing easy and instant. Buried or broken unsubscribe links convert opt-outs into spam reports. Spam reports are far more damaging than unsubscribes.

**Content quality:** Avoid spam trigger words in subject lines (free, guaranteed, act now). Maintain a healthy text-to-image ratio. HTML-heavy, image-only emails perform poorly in deliverability scoring.

#### KEY INSIGHT

Your sender reputation is built over months and destroyed in days. Sending one large campaign to an unclean list -- including old imports, purchased lists, or long-lapsed subscribers -- can tank deliverability that took a year to build. When in doubt, send to fewer people with better targeting.

## SECTION 08

### Measuring and Scaling Performance

## Measuring and Scaling Performance

Klaviyo provides more data than most ecommerce brands know what to do with. The key is knowing which metrics drive decisions and which ones are noise.

### Metrics that drive decisions:

Metric	Target Benchmark	Action if Below Target
Open rate	35% or higher for engaged segments	Audit subject lines and sender name; re-segment list
Click rate	2% to 4% for broadcast emails	Improve CTA clarity; test fewer links per email
Conversion rate	1% to 3% for promotional emails	Audit landing page experience; test offer strength
Revenue per recipient	\$0.10 to \$0.50 per email sent	Improve segmentation; test higher-LTV segments
Flow revenue %	30% or more of total Klaviyo revenue	Audit and expand underperforming flows
List growth rate	5% to 10% net growth per month	Audit pop-up conversion rate; test new lead magnets
Unsubscribe rate	Below 0.5% per send	Reduce send frequency; improve content relevance
Spam complaint rate	Below 0.08%	Urgent: audit list quality and unsubscribe process

### Scaling what works:

- **Improve your highest-revenue flow first.** Use Klaviyo's flow analytics to identify which flow drives the most revenue. The abandoned cart flow is typically first. Optimize subject lines, timing, and offer before moving to the next flow.
- **A/B test subject lines on every broadcast.** Klaviyo's built-in A/B testing makes this easy. Test one variable per send: subject line length, emoji vs no emoji, question vs statement. Build a subject line swipe file from your winners.
- **Expand high-performing segments.** If your 30-day engaged segment converts at 3x the rate of your 90-day segment, grow that segment through better pop-up targeting and acquisition source tagging.
- **Add SMS to high-performing email flows.** Once an email flow is performing well, add an SMS touchpoint at the highest-intent moment (30 minutes before email 1 in cart abandonment, day of predicted run-out in replenishment).

- **Review flow performance quarterly.** Flows set up 12 months ago may not reflect your current product mix, offers, or audience. Audit the top 3 flows quarterly and refresh copy, images, and offers.

## SECTION 09

### Quick-Reference Checklist

## Quick-Reference Checklist

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### Account Setup

- Klaviyo account created and Shopify integration connected
- Custom sending domain verified with SPF, DKIM, and DMARC records
- Brand identity (logo, colors, sender name) configured
- SMS sending number registered and A2P 10DLC completed
- Web tracking snippet active on all product and collection pages

### Flows

- Welcome series live (minimum 4 emails)
- Abandoned cart flow live (minimum 3 emails plus SMS)
- Post-purchase onboarding flow live (minimum 4 emails)
- Browse abandonment flow live (minimum 2 emails)
- Replenishment flow live for consumable products
- Win-back flow live with sunset email at final step
- VIP flow created and LTV threshold defined

### Segmentation

- Engaged 30-day segment built
- Engaged 90-day segment built
- Unengaged segment built and suppressed from broadcasts
- First-time buyer segment built
- VIP segment defined and tagged
- Product category buyer segments built for top 3 categories

### Deliverability and Compliance

- Hard bounce suppression active (Klaviyo handles automatically)
- Spam complaint rate monitored and below 0.08%
- Unsubscribe rate per send below 0.5%

- SMS opt-in collected separately from email opt-in
- SMS Quiet Hours enabled in Klaviyo settings
- Unengaged subscribers excluded from all broadcast campaigns

## Want Help Setting Up or Scaling Klaviyo for Your Store?

AI Advantage Agency sets up and manages Klaviyo email and SMS for e-commerce brands — from how to integrate with your store to how to create and launch your first email campaign.

Book a free strategy call [with us today](#) to learn more about our services.

Explore all services and pricing options [on our website](#).

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