

You've signed up for your Klaviyo account, now what? **In Social** has partnered with Klaviyo to ensure you are using the tool to its full potential! From collecting email addresses and phone numbers to implementing email automation based on purchase history, as well as sending targeted campaigns and triggering push notifications to drive sales, **Klaviyo—when utilized effectively—can leverage data and third-party integrations to boost your bottom line by over 67%.**

WHY SHOULD YOU WORK WITH IN SOCIAL?

Founded in 2015, **In Social** is a **full-service digital agency** supporting brands across all digital marketing channels including: **organic & paid social media, Google Ads & PPC, website design & development, content creation, influencer marketing, online customer service** (with NA based agents), and **fulfillment**, and of course, **email & SMS marketing**. Applying our methodology of "The Full-Circle Approach to Digital Marketing," we ensure our portfolio of brands have engaging and cohesive messaging between all digital touchpoints to increase conversion rate, return customers, and your bottom line by creating a holistic and memorable customer experience.

LET'S GET YOUR ECOMM BRAND UP AND RUNNING ON KLAVIYO

What's included in this one-time onboarding package?

KICK-OFF CALL

A one-time meet & greet between teams, a deep dive into your brand inside and out, review of the In Social process, expected outcomes, and the roadmap to set everyone up for success!

ACCOUNT MANAGEMENT

You'll have an In Social Point of Contact updating you throughout the project, collecting and organizing relevant information, and passing on questions or additional information between the teams.

KLAVIYO ACCOUNT SETUP

Account setup

- Setting up organization, team members/ account users

Domain & Branded Email Sending*

- Configuring DMARC, DKIM, SPF records (required)
- Setting up branded sending domain (required)

Attribution setup

- Configuring UTM settings
- Reviewing & updating attribution settings for best practices

Branding setup

- Configuring brand logos, fonts, social links, and colors

*Client or IT team involvement may be required

SMS SETUP & CONFIGURATION

Phone Number

- Porting over existing number* or creating a new one

Account Settings

- Ensuring SMS settings are enabled
- Configuring auto-reply & opt-out settings

Legalese

- Support in adding proper SMS legalese into existing ToS & Privacy Policies on your website

*Porting an existing SMS number can take up to 4 weeks, Client or IT team involvement may be required.

DATA IMPORT & CUSTOM PROPERTIES

Importing existing customer lists into Klaviyo from other platforms, ensuring proper data transfer of custom properties.

Additional fees may be required for deep data cleaning or manipulation.

3RD-PARTY INTEGRATION AND CONFIGURATION

Syncing 3rd-party apps into Klaviyo, configuring the proper sharing of data, and creating segments and other custom settings in relation to the relevant app data.

See the full list of ecommerce integrations [here](#).

Must already have existing subscriptions/accounts with the integrations.

LIST & SEGMENT CREATION

Based on imported data from your Ecommerce platform and 3rd party integrations (if applicable), creating lists and up to 5 relevant segments for effective messaging and strategic campaign sending. Also setting up single-opt in capture (if requested) to increase sign-up rate.

POP-UP DESIGN & DEVELOPMENT

Strategizing, copywriting, designing, developing, and testing a pop-up form to capture emails and/or numbers from visitors on your website. If using a 2-step form, visitors will be able to submit 1 of the 2 options, and you will still capture it even if they abandon the form before completion.

WELCOME FLOW DESIGN & DEVELOPMENT

Strategizing, copywriting, designing, developing, and testing a Welcome Flow* for either/both email and SMS subscribers with 1 email and/or 1 message. The Welcome Flow will send upon user opt-in.

*An Email Welcome Flow and an SMS Welcome Flow must be built separately. All other types of flows can include both messages.

COMPLETION CALL

At the completion of this project, the In Social team will review what we've accomplished, explain the metrics to monitor and measure, and provide additional guidance on how to use Klaviyo to its full potential.

ADDITIONAL NEXT STEPS

STRONGLY RECOMMENDED FOR NEW SENDING DOMAINS

In order to ensure your Klaviyo account is healthy, that your list is engaged, and that your lifecycle marketing efforts will bring a healthy return, we highly recommend the following efforts once this scope is complete.

ACCOUNT WARMING STRATEGY

ACCOUNT WARMING IMPLEMENTATION

ADDITIONAL ECOMM FLOW CREATION

ONGOING EMAIL & SMS CAMPAIGNS

LIFECYCLE MARKETING RETAINER

YOUR OUTSOURCED MARKETING DEPARTMENT

Let In Social apply our "Full Circle Approach to Digital Marketing" to your entire Ecommerce digital brand

Contact us at getstarted@insocial.ca to activate and elevate your lifecycle marketing efforts to generate more sales, increase customer lifetime value, and create a base of loyal customers.