

# KLAVIYO SETUP CHECKLIST

- ☐ Add organization name and address (CAN-SPAM act compliance)
- ☐ Add tracking codes
  - ☐ Add Web and Product tracking code ([click here](#))
  - ☐ Add Form snippet code ([click here](#))
- ☐ Setup email preference page ([video explanation](#))
  - ☐ Request Hosted Pages
- ☐ Turn Off Double Opt-In for all existing and new lists ([video explanation](#))
- ☐ Setup profile metrics view
- ☐ Check if the website footer sign up form leads to email service provider ESP (Klaviyo). This also includes any other email opt-in possibilities.
- ☐ Setup integrations
- ☐ Setup coupons ([Shopify](#) or [Magento 1.x](#))
  - ☐ Enable Coupon feature for custom platform
- ☐ Create lists
  - ☐ [FLOW TRIGGER] Exit Intent

## Create Segments

- **Master Segment (All-in)**
  - Not suppressed
- **[FLOW TRIGGER] Sunset**
  - Not suppressed
  - AND Open emails zero times in the last 90 days  
OR Clicked emails zero times in the last 90 days
  - AND Open email at least once overall  
OR Received Email is at Least 10 overall
  - AND Properties about someone Created is at least 90 days ago
- **[EXCLUDE] [SUPPRESS] Bounced 4+**
  - Bounced at least 4 overall time
  - Open emails zero times in the last 60 days
  - Not suppressed
- **[CAMPAIGNS] Engaged - 90 days**
  - Opened at least one email in the last 90 days  
OR clicked at least one email in the last 90 days  
OR properties about someone created is in the least 15 days
  - Not suppressed
- **[CAMPAIGNS] Engaged - 60 days**
  - Opened at least one email in the last 60 days  
OR clicked at least one email in the last 60 days  
OR properties about someone created is in the least 15 days
  - Not suppressed

- **[CAMPAIGNS] Engaged - 30 days**
  - Opened at least one email in the last 30 days  
OR clicked at least one email in the last 30 days  
OR properties about someone created is in the last 15 days
  - Not suppressed
- **[EXCLUDE] [SUPPRESS] Spam**
  - First name contains http  
OR First name contains www  
OR First name contains .com  
OR First name contains <\*add new variable>
  - Not suppressed
- **[EXCLUDE] Received 10+ email and opened zero**
  - Received Email is at Least 10 in the last 90 days
  - Opened Email Zero Times in the last 90 days
  - Not suppressed
- **[EXCLUDE] Inactive Gmail Accounts [2 Years Inactive]**
  - Received Email at least once over all time where Inbox Provider equals Gmail
  - Opened Email zero times in the last 720 days
  - Received Email is at least 5 in the last 720 days
  - Created is at least 365 days ago
  - Not suppressed

- **[EXCLUDE] Spam Trap Role Accounts**

- Email contains Abuse@
  - OR Email contains support@
  - OR Email contains staff@
  - OR Email contains unsubscribe@
  - OR Email contains postmaster@
  - OR Email contains admin@
  - OR Email contains subscribe@
  - OR Email contains info@
  - OR Email contains jobs@
  - OR Email contains noc@
  - OR Email contains sales@
  - OR Email contains webmaster@
  - OR Email contains mailer-daemon@
  - OR Email contains help@
  - OR Email contains www@
  - OR Email contains orders@
  - OR Email contains No-Reply@
  - OR Email contains noreply@
  - OR Email contains hostmaster@
  - OR Email contains billing@
  - OR Email contains marketing@
  - OR Email contains prob.sbcounty.gov
- Not suppressed

- **High Email Engagement**

- Opened Email is at least 15 in the last 90 days  
OR Clicked Email is at least 10 in the last 90 days
- Not suppressed

- **Customer**

- Placed Order at least once over all time
- Not suppressed

- **Repeated Customer**

- Placed Order at least 2 over all time
- Not suppressed

- **VIP (2\*AOV)**

- Average Order Value (AOV) is greater than 2\*AOV over all time
- Not suppressed

- **High AOV (1.5AOV)**

- Average Order Value (AOV) is greater than 1.5\*AOV over all time
- Not suppressed

- **Super Engaged - 4+ Opened in 30 days Segment**
  - Opened Email is at least 4 in the last 30 days  
OR Clicked Email is at least 4 in the last 30 days
  - Not suppressed
- **[EXCLUDE] Received email AND bounced in the last 7 days**
  - Bounced at least once in the last 7 days
  - Received Email is at Least Once over all time
  - Not suppressed
- **[EXCLUDE] Amazon/Ebay emails**
  - Email contains @marketplace.amazon.com  
OR Email contains @members.ebay.com  
OR Email contains @chat-seller-us.tiktok.com
  - Not suppressed
- **[CAMPAIGNS] Unengaged**
  - Opened zero emails in the last 90 days
  - Properties about someone created is at least 90 days ago
  - Not suppressed

[Contact our team](#) for a complimentary Email Marketing Audit or Free Consultation.