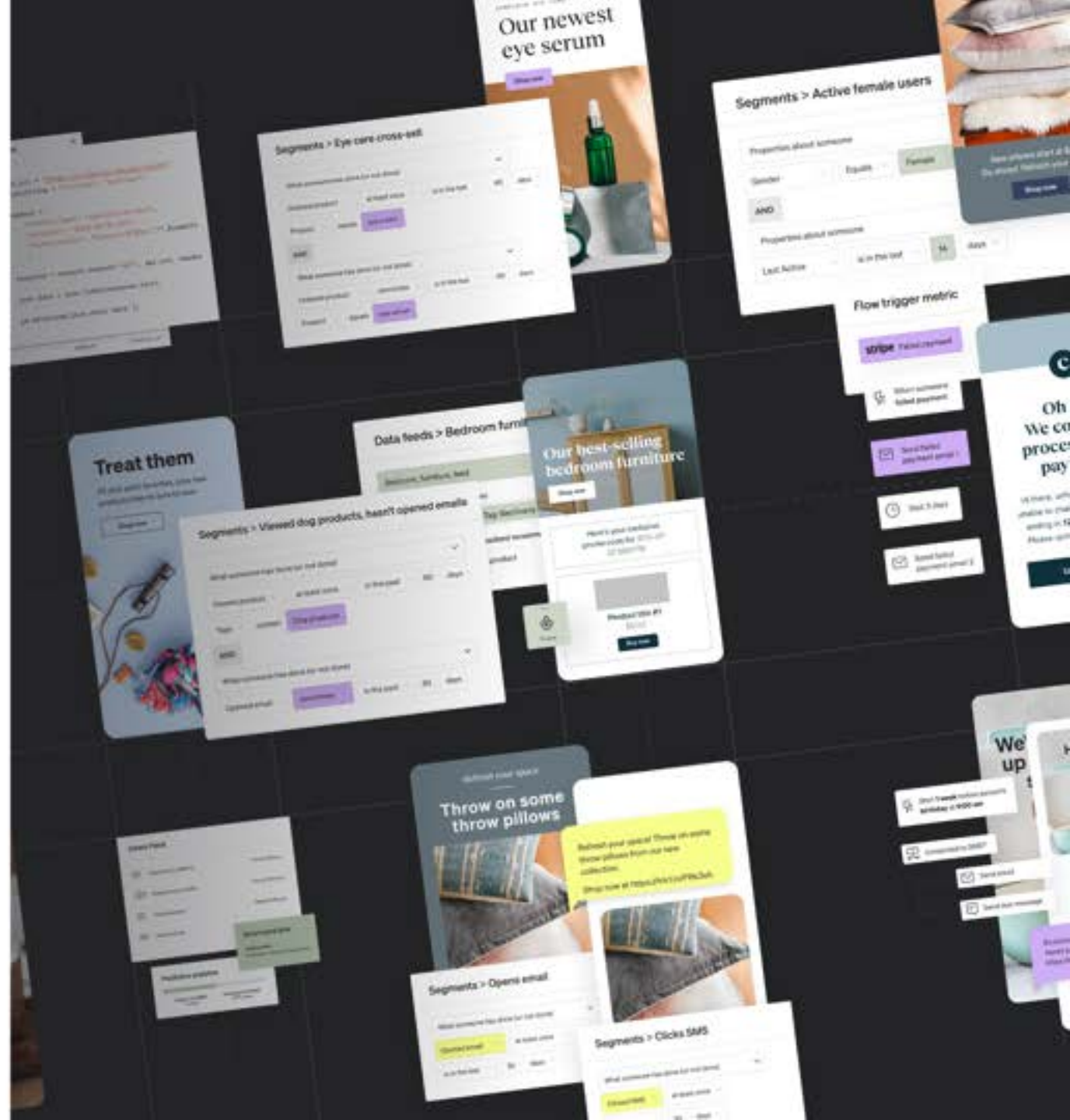




# Unleashing Growth by Activating your Email List with Meta and Google Ads

We'll start shortly



# Nik Rajpal

## VP of Marketing Sciences

- In 15 years with EXCLUSIVE, Nik has held several pivotal roles from growing our organic search department to building out our sales efforts. He has crafted thousands of custom marketing plans that result in tremendous growth. Nothing makes him happier than helping others succeed!



# Faith Gagliardi

## Director of Email & SMS Marketing

- Faith has over 14 years of hands-on marketing experience in a range of roles from web design to email marketing and beyond. She holds a Master of Science in Integrated Marketing Communications, which she leverages every day while working to help real businesses achieve their goals.





# Melissa Knowlton

## Head of Paid Search & Video Advertising

- Melissa has been with EXCLUSIVE for 4 years. She manages her clients' holistic PPC strategies (search, display, video, and discovery campaigns) on Google Ads and Microsoft Ads, and oversees a team of specialists and managers who support clients across industries. Melissa holds a degree in Marketing from Champlain College.



# Kaitlyn Kerr

## Social Marketing Manager

- In her four years at EXCLUSIVE, Kaitlyn has helped drive program and service innovation for paid social which includes Meta, Instagram, Pinterest, LinkedIn and TikTok. She is responsible for establishing best practices, performance-driven social strategies, delivery and reporting that deliver optimal results for EXCLUSIVE's clients.



# Trusted by emerging and established brands





## **Channel Specialization**

Organic search

Product ads

Conversion consulting

Email & SMS

Paid search & display

Marketplaces

Conversion testing

Social marketing

**Coordinated by our strategy team**

**Brought together with our holistic  
technology**



# Holistic Technology

Our Data Warehouse enables us to view your data through our Virtuous Activity Cycle framework, gain cross-channel insights through reports, and drive performance.

## Why We Built Our Own Tech:

- Hit Holistic Goals Faster
- Coordinate Cross-Channel
- Compete Smarter & Flexibly





# Joe McCarthy

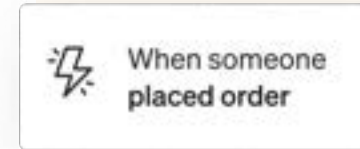
## Director, Ecosystem Marketing

- As the Director of Ecosystem Marketing at Klaviyo, Joe has more than a decade of experience in digital marketing, most of which he spent helping e-commerce businesses grow. His passion is all things marketing strategy.



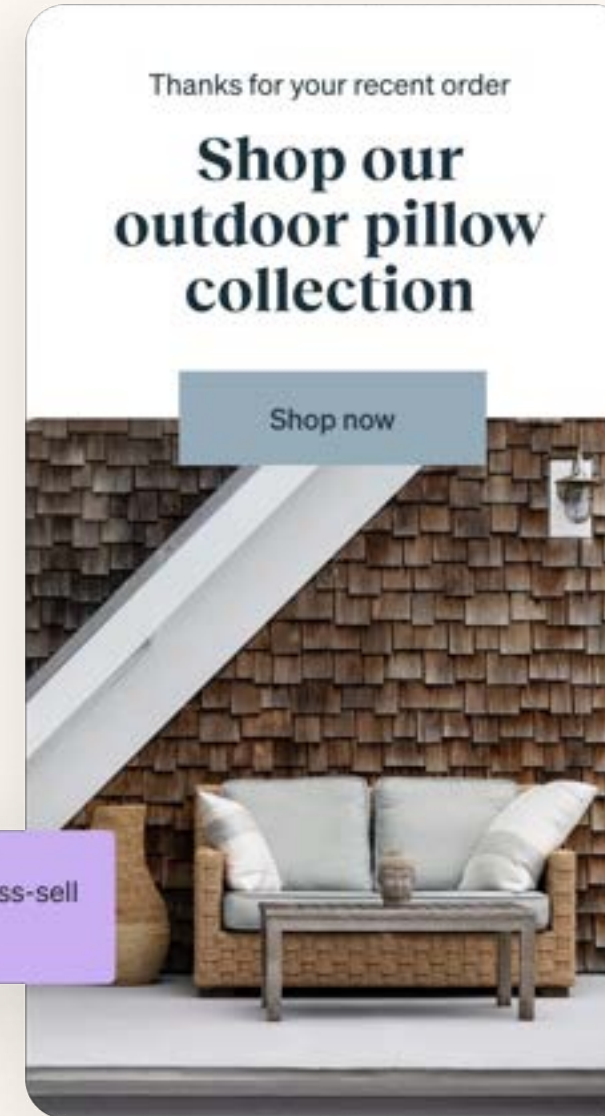
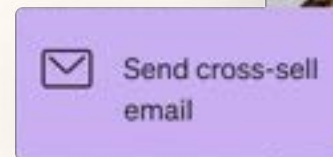
# Klaviyo

Klaviyo is a unified customer platform that helps leading brands personalize communications to their customers at scale, easily acquire new ones, and use their own data to drive revenue.



No

Yes



# Why leading brands choose Klaviyo

- Unified platform built to unleash growth
- Fast and accessible to speed execution
- Enterprise-grade personalization that scales
- Powerful ecosystem ready to help you



## Treat them

All your pet's favorites, plus new products they're sure to love.

Shop now

Treat your pet—all their favorites, plus new products they're sure to love.

Shop now at <https://klv1.io/hVu25>

Segments > FB prospecting

Choose a Facebook audience to sync with

Active + purchased in the past year



klaviyo



# A customer platform built as one unified experience from the ground up



Email



SMS



Push



Web



Social

## Experiences

Workflow Builder / Campaign Automation / Condition Logic / Behavioral Logic / Logic Builder

## Learning

Recommended Actions / Churn & LTV Prediction / Attribution Modeling / Reporting & Analysis

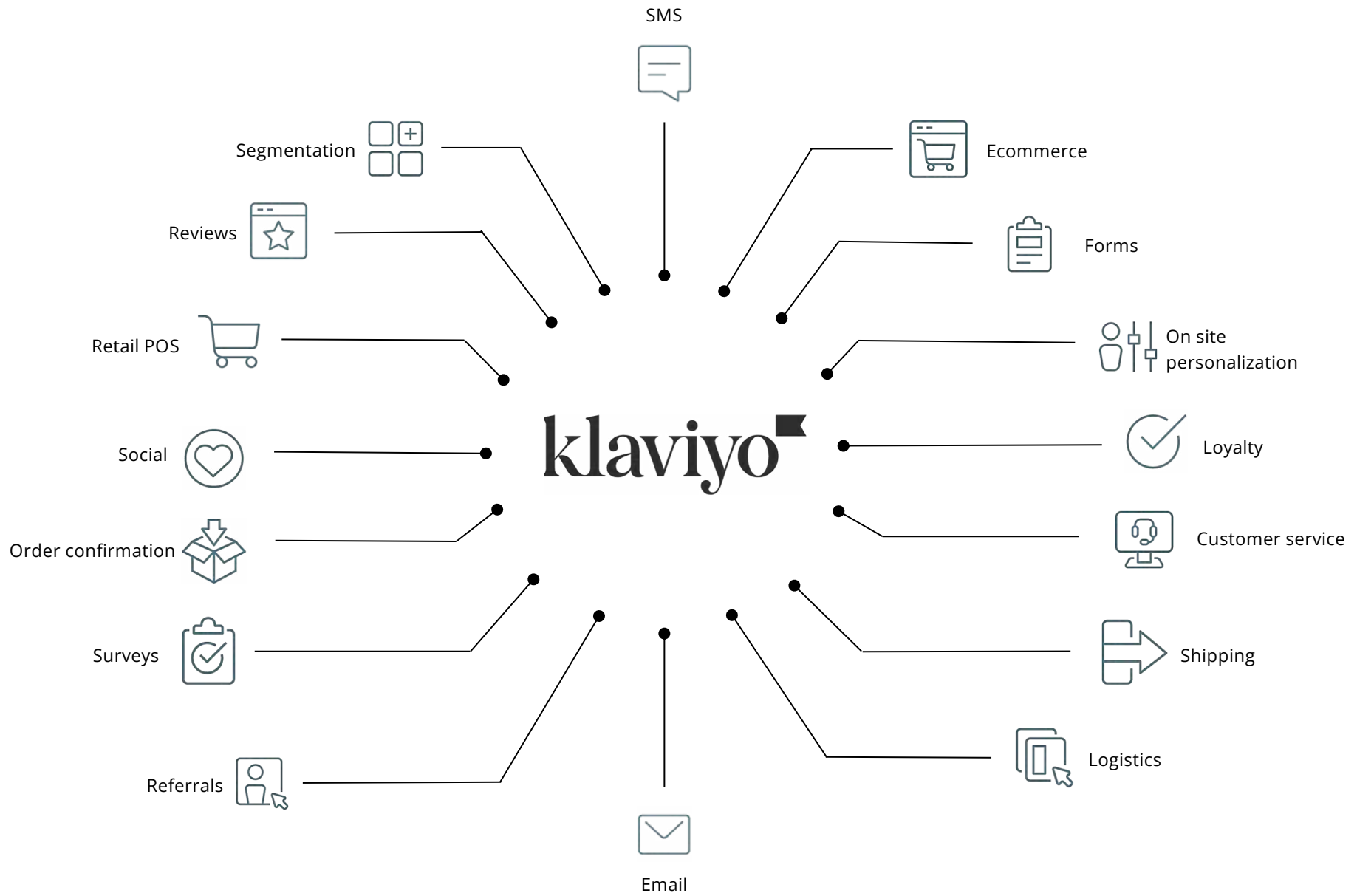
## Database

Unified Profiles / Identity Resolution / Data Integrations / Dynamic Segmentation



klaviyo

WITH 300+ DATA SOURCES



# That completes the direct-to-consumer tech stack

## Ecommerce Infrastructure

Payments  
Order and Inventory Management  
Fulfillment



+ dozens of other platforms



## Customer Infrastructure

Customer Data Management  
Marketing and Messaging  
Customer Experience Automation  
Attribution and Optimisation  
Data Science and Predictive Analytics  
Reporting and Insights





A low-angle, upward-looking photograph of several modern skyscrapers with glass facades, set against a clear blue sky. The buildings are arranged in a way that creates a sense of height and scale, with lines converging towards the top of the frame. The glass reflects the sky and other buildings, adding depth to the image.

# Getting Holistic With Your Email and SMS

# Virtuous Activity Cycle

- We've gone from 6 core channels to 15+ in just ten years - luckily, platforms have all been building their technology around five desired outcomes.
- The EXCLUSIVE Framework allows planning to focus on the 5 desired outcomes of marketing – awareness, consideration, conversion, loyalty, and advocacy.
- These 5 investment areas support one another in a virtuous cycle

# Virtuous Activity Cycle

When combined into a single view, the Virtuous Activity Cycle (VAC) approach allows you to evaluate each driver of your business as an entity that deserves its own investment level and goal.

Activity	Impressions	Clicks	CTR	Conversions	CVR	Ad Spend	Revenue	ROAS
<u>Awareness</u>	2,420,832	6,368	0.26%	7,837	123%	\$1,411	\$7,837	555%
<u>Consideration</u>	1,058,776	13,016	1.23%	566	4%	\$20,623	\$33,353	162%
<u>Conversion</u>	43,426	7,188	16.55%	716	10%	\$8,413	\$44,496	529%
<u>Loyalty</u>	87,428	935	1.07%	35	4%	\$1,550	\$2,144	138%
<u>Other</u>	1,188,716	10,039	0.84%	690	7%	\$14,760	\$36,688	249%



# Search-Based Journey

**Description**



Winners in your category have the most visibility for non-branded, categorical, intent-based search.

**Examples**



**Core Focus**



Organic search, Google/MSN paid search and shopping, marketplace, Pinterest

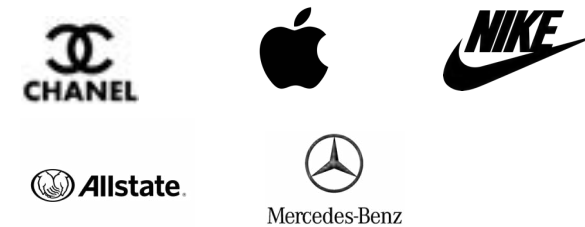
**Drivers**



Efficiency Drivers: Consideration & Conversion  
Growth Drivers: Awareness, Loyalty, & Advocacy

# Brand-Based Journey

Winners in your category have the most brand awareness – and that’s what matters to buyers.



Meta, TikTok, Google Display, YouTube, Amazon DSP, Criteo, MSAN, Email / SMS

Efficiency Drivers: Awareness & Conversion  
Growth Drivers: Consideration, Loyalty, & Advocacy

Your Customers Determine How Important Awareness Is

# POLL: Your Customers Determine How Important Awareness Is



## Search-Based Journey

Brand awareness has minimum impact on conversions

### Efficiency drivers

Consideration & Conversion

### Growth drivers

Awareness, Loyalty, & Advocacy



## Brand-Based Journey

Brand awareness is a conversion booster in the buying process

### Efficiency drivers

Awareness & Conversion

### Growth drivers

Consideration, Loyalty, & Advocacy

# Introducing Marketing Efficiency Ratio

Why is this the winning KPI for the future?

- Does not rely on channel attribution
- Values owned media's contribution
- Easy to compare against avg. margin

Total marketing costs

÷

Total revenue

=

**MER**

Marketing

Efficiency

Ratio

# Tracking CLTV in cohorts

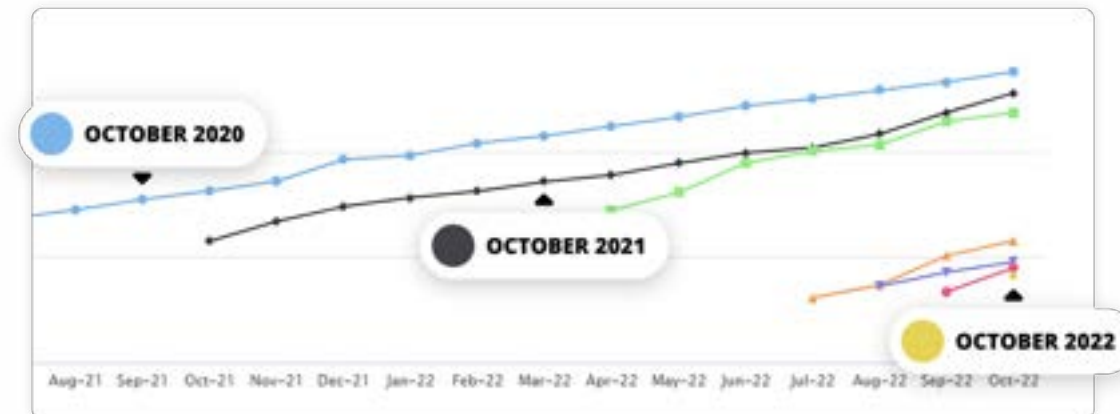
EXCLUSIVE's Customer Lifetime Value report groups customers in time-based cohorts.

This allows us to see how basket size and customer lifetime trends are changing and improving over time.

## Key CLV Metrics



## Lifetime Value Cohorts

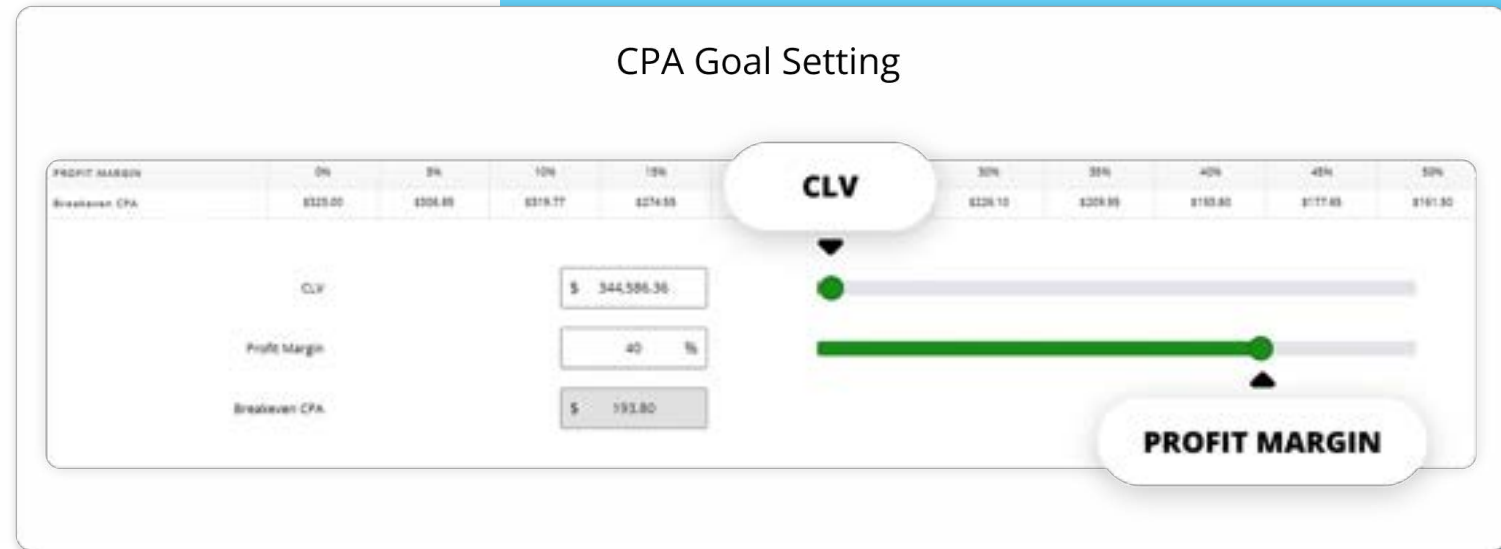


MONTHS SINCE FIRST ORDER	TOTAL CUSTOMERS	NET NEW CUSTOMERS	CPA	CLV MONTH 0	CLV MONTH 1	CLV MONTH 2	CLV MONTH 3	CLV MONTH 4	CLV YEAR 1	CLV YEAR 2
October 20	1,267	840	\$18.18	\$178.11	\$168.34	\$161.22	\$154.25	\$147.55	\$141.24	\$135.23
October 21	2,087	1,709	\$15.81	\$176.21	\$165.85	\$156.34	\$147.22	\$138.15	\$129.24	\$120.23
April 22	2,080	1,881	\$14.87	\$181.15	\$171.38	\$161.22	\$151.22	\$141.15	\$131.24	\$121.23
August 22	4,087	2,108	\$15.79	\$175.22	\$165.15	\$155.22	\$145.15	\$135.24	\$125.23	\$115.22



# Using CLTV to set CPA goals

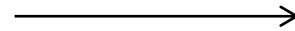
- The foremost purpose of having a view into CLTV is to set cost per acquisition targets. Add margin data, and our CPA targeting calculator helps give us a better sense of what CPA targets maximize benefit to your business.



# Agenda

Meta, Google,  
TikTok

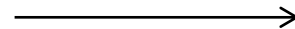
Part 1: Driving Leads from Awareness  
+ Consideration Ads Into Your 1<sup>st</sup>  
Party Database



Klaviyo

Klaviyo

Part 2: Pushing 1<sup>st</sup> Party Data  
Into Ads to Impact All 5 Desired  
Outcomes of Marketing



Meta, Google,  
Criteo, Pinterest

Part 1

# Driving Leads from Awareness + Consideration Ads Into Your 1<sup>st</sup> Party Database



# How Do You Setup Awareness Ads to Import Directly Into Your 1<sup>st</sup> Party Database?





# Lead Form Fills That Feed Into Klaviyo

With an intermediary like Zapier, you can immediately drive Google Ads lead form fills into Klaviyo.

## Add new Google Ads leads to Klaviyo

Set up this integration to keep your outreach on target without getting bogged down in duplicate data entry. Once it's active, this Zap automatically generates a subscriber in your Klaviyo account from each new lead capture in Google Ads.



# Google Ads Lead Form Formats

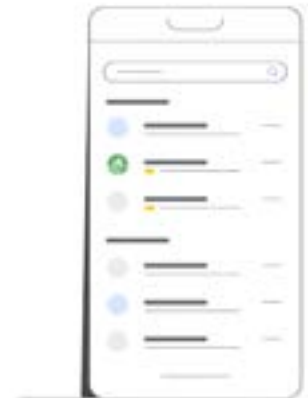
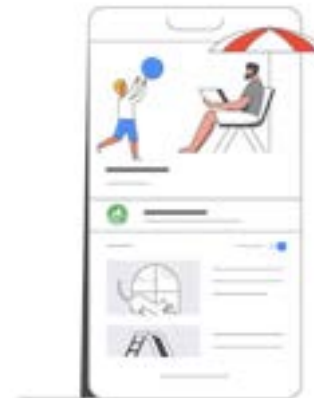
Display

Search



Video

Discovery



# Meta & Instagram Lead Ads

Meta and Instagram lead ads make the lead generation process easy by allowing you to:

- Collect the data you need from your customers
- Optimize for a mobile experience
- Get higher quality leads when you customize form questions
- Seamlessly integrate with Klaviyo

A screenshot of a lead ad form overlaid on the Facebook post. The form has a close button (X) in the top left corner and a five-star rating indicator. It features the same image of the cold pressed juice bowl. The text asks: "How about a free sample? It's okay if you haven't made up your mind. Give us your basic contact information and we will send you a few samples to try." The form includes input fields for "Your name" and "Your contact information", both containing the placeholder text "Test". Below these is a section titled "Which products are you looking to try?" with three checkboxes: "Anything, surprise me!", "Kiwi Juice", "Avocado Juice", and "Grape Juice". At the bottom, there is an "Address to receive our samples:" field with the placeholder "Test" and a blue "Submit" button. A small disclaimer is visible at the very bottom of the form.

# TikTok Lead Ads

With an intermediary like Zapier and LeadsBridge, you can seamlessly sync new leads to Klaviyo which will unlock powerful growth marketing possibilities on TikTok.

- TikTok lead ads makes the lead generation process easy by allowing you to:
  - Collect customer information from your ads on TikTok
  - Drive higher conversion rates by delivering a mobile friendly experience with pre-populated fields
  - Sync data with Klaviyo in real-time

## A seamless experience for lead conversion



# Now You Have a Fresh Database, How Do You Nurture Those Leads in Your Email + SMS Program?





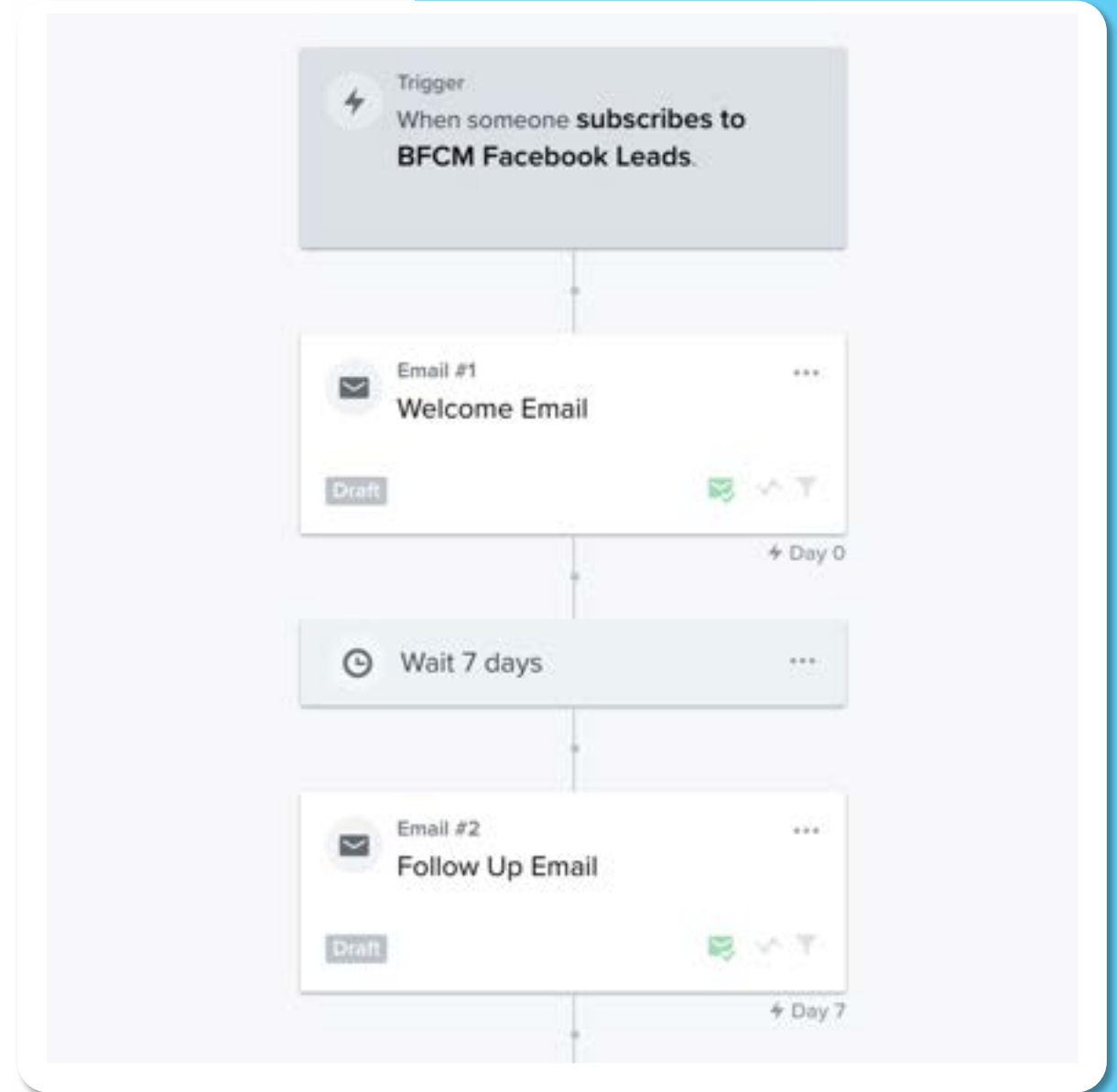
# During Welcome Sequence, Target Discount Based on Source

- Utilize your CPA target calculations to adjust discount based on the costs to bring leads in from different sources



# Extend Onboarding Experience + Drive Loyalty

- Create a welcome email for those who sign up, then drip email + SMS content to them for a seamless digital experience until conversion.
- Use data from Facebook (i.e., information provided from the lead ad as a “source”) and zero-party data in Klaviyo (i.e., on-site activity) to make very tailored outreaches.



# Drive Conversions with Flows + Ads Targeting Cart Abandoners

## 1. Create a segment

Definition

What someone has done (or not done)

Has  Added to Cart  at least once  over all time

What someone has done (or not done)

Has  Placed Order  zero times  over all time

## 2. Sync segment to Facebook

Syncs

Add a Custom Audience sync to get started.

Klaviyo List or Segment	Facebook Custom Audience
<input type="button" value="Cart Abandoners"/> <input type="button" value="⌵"/>	<input type="button" value="Klaviyo Cart Abandoners"/> <input type="button" value="⌵"/> <input type="button" value="X"/>

[+ Add Custom Audience sync](#)

# Price Drop

- You don't need to be an aspirational brand for your customers to find it hard to afford your products
- For customers who are stuck in pre-conversion stages due to affordability (or desire to be frugal), price drop workflows can turn dormant interest into active customers





# Back In Stock

- Some of your highest interest customers can't make a purchase due to out of stock – this was especially prevalent during the pandemic / supply shortages
- Letting customers know that their desired item is back in stock could result in very high conversion rates from a targeted audience, and a win for new customer acquisition!





Part 2

# Pushing 1<sup>st</sup> Party Data Into Ads to Impact All 5 Desired Outcomes of Marketing

# How Do You Organize Your Full 1<sup>st</sup> Party Database for Strategic Ads?





# Order of Operations

1. Outline marketing strategy with details around what types of audiences will be targeted on which platforms
2. Identify audiences in Klaviyo + build supporting content (flows, forms, landing pages, etc.)
3. Integrate Klaviyo with ad platforms (Meta, Google Ads, Criteo, etc.)
4. Connect your target audiences in Klaviyo to the ad platforms outlined in your strategy via integrations
5. Go live with finalized marketing strategy + analyze performance



# Key Audiences to Identify for Syncing Across Channels

- All purchasers
- VIP profiles
- Cart abandoners
- Browse abandoners
- Product purchasers
- Lapsed customers
- Recent site visitor
- New profiles
- All email/SMS subscribers
- Profiles in/near a location
- Full-price purchasers
- Subscription purchasers

### Create a segment

Definition

What someone has done (or not done)

Has  is at least  in the last  days

### Sync segment to Meta

Syncs

Add a Custom Audience sync to get started.

Klaviyo List or Segment	Facebook Custom Audience
<input type="button" value="Repeat Customers"/> <input type="button" value="⌵"/>	<input type="button" value="Klaviyo Repeat Customers"/> <input type="button" value="⌵"/> <input type="button" value="X"/>

[+ Add Custom Audience sync](#)

# Pro-Tip: Identify Additional Audiences for Exclusion Purposes

- Profiles with open support ticket
- Suppressed and/or unsubscribed profiles
- Profiles that left a 1-or-2-star review
- Discount only shoppers
- Seasonal only shoppers (if not in that season)
- Profiles who cancelled a subscription

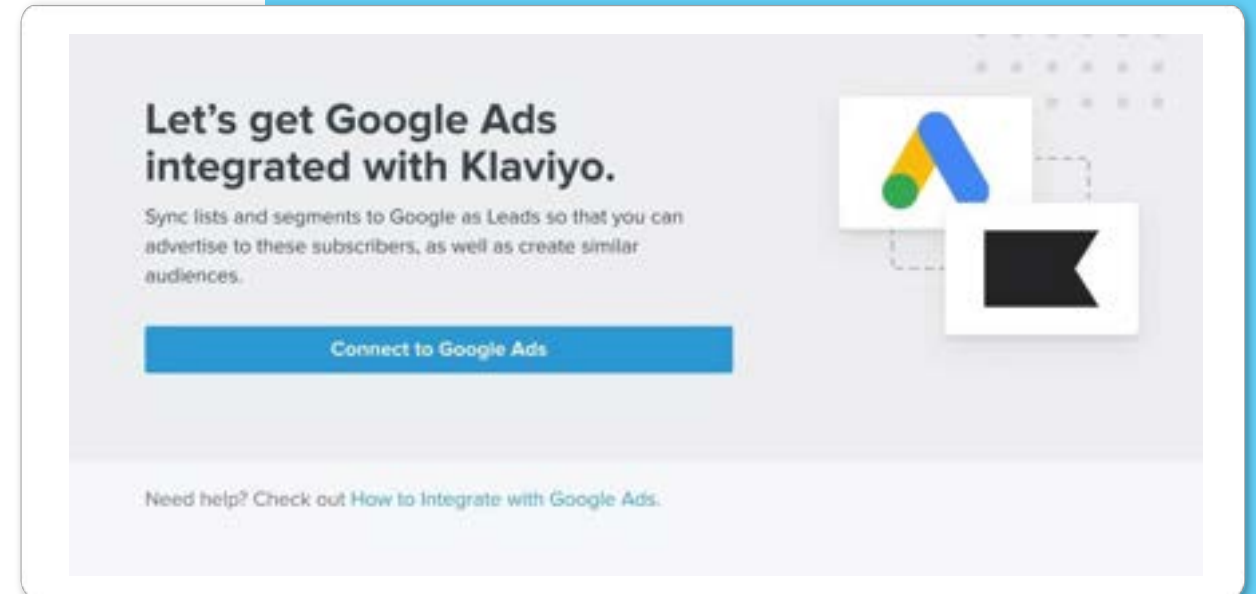




# Sync with Ad Platforms

Klaviyo offers the ability to seamlessly sync your audience segments from Klaviyo into key advertising platforms, such as:

- Meta (Facebook/Instagram)
- Google Ads
- Criteo
- Pinterest – not a direct integration
- TikTok – not a direct integration



# Use Case Example: VIP Profiles

## Considerations for building audience:

- Email/SMS subscriber status
- Length of time subscribed
- Date of first purchase
- Revenue spent
- Predicted revenue spend
- Number of placed orders over all time
- 5-star reviewer
- Loyalty tier
- Custom profile properties

## Campaign types to support:

- Retargeting
- Lookalikes/similar

## Platforms can be used on:

- Google Ads
- Meta (Facebook/Instagram)
- Pinterest
- Criteo

The background of the slide is a photograph of a modern building's exterior. The building features a curved glass facade with a grid of dark window frames. The perspective is from a low angle, looking up at the building, which creates a sense of height and architectural scale. The sky is a clear, light blue, providing a clean backdrop for the white text.

# How to Utilize 1<sup>st</sup> Party Data to Optimize Awareness Advertising Within Ad Platforms?

# Meta Ads

- Combining Meta's value-based lookalike audience tool with Klaviyo audience segmentation allows brands to use current customer data – from behaviors and interests to predictive analytics – to create more precise lookalike audiences
- It's all about reaching your most promising prospects
- Lookalike Segments
- 1-10% lookalike of top customers by revenue/number of orders
- 1-10% lookalike of lifetime value customer
- 1-10% lookalike of product specific purchasers

**Zum Bar Soap - Indigo Wild**  
Sponsored · 🌐

Shop \$5 Zum Bars all weekend long. Stock up on the goat's milk and plant-filled lathers you love like Frankincense & Myrrh, Sea Salt, Amber, and more!



**SIMPLE LUXURIES.**  
**\$5 Zum Bars**  
ALL WEEKEND LONG.

INDIGOWILD.COM  
**RUN! It's \$5 Bars!** 📍  
Orders \$50+ Ship FREE!

Shop now

# Meta Ads

- Meta's pixel has powerful remarketing segmentation tools but with Klaviyo's audience segmenting, brands can narrowly define the type of customer they want to re-engage based on any combination of behavior-based attributes
- Pair the Klaviyo audience segment with ultra-relevant content to nurture retention and increase lifetime value
- Target valuable remarketing segments like:
  - Winback – customers that haven't purchased in a while
  - Re-Engage – inactive subscribers with relevant Meta ad
  - Cross-Sell
  - Up-Sell
  - VIP customers
  - Product-Specific Customers



Zum Bar Soap - Indigo Wild

Sponsored · 🌐



Check out aromatic, plant-packed Lavender Zum. This aromatherapy classic is a must-have when it comes to relaxation. 💜



INDIGOWILD.COM

**Plant-Based Bliss**

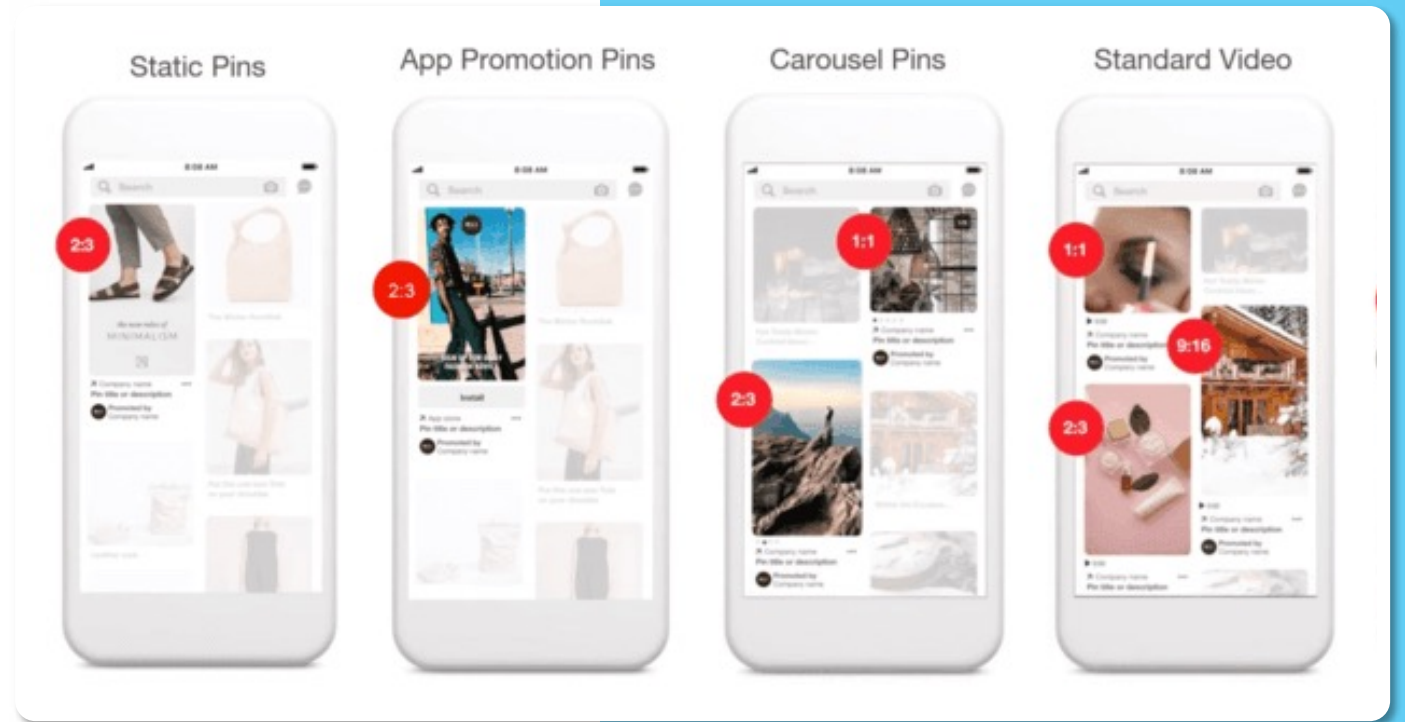
Orders \$50+ Ship FREE!

Shop now



# Pinterest

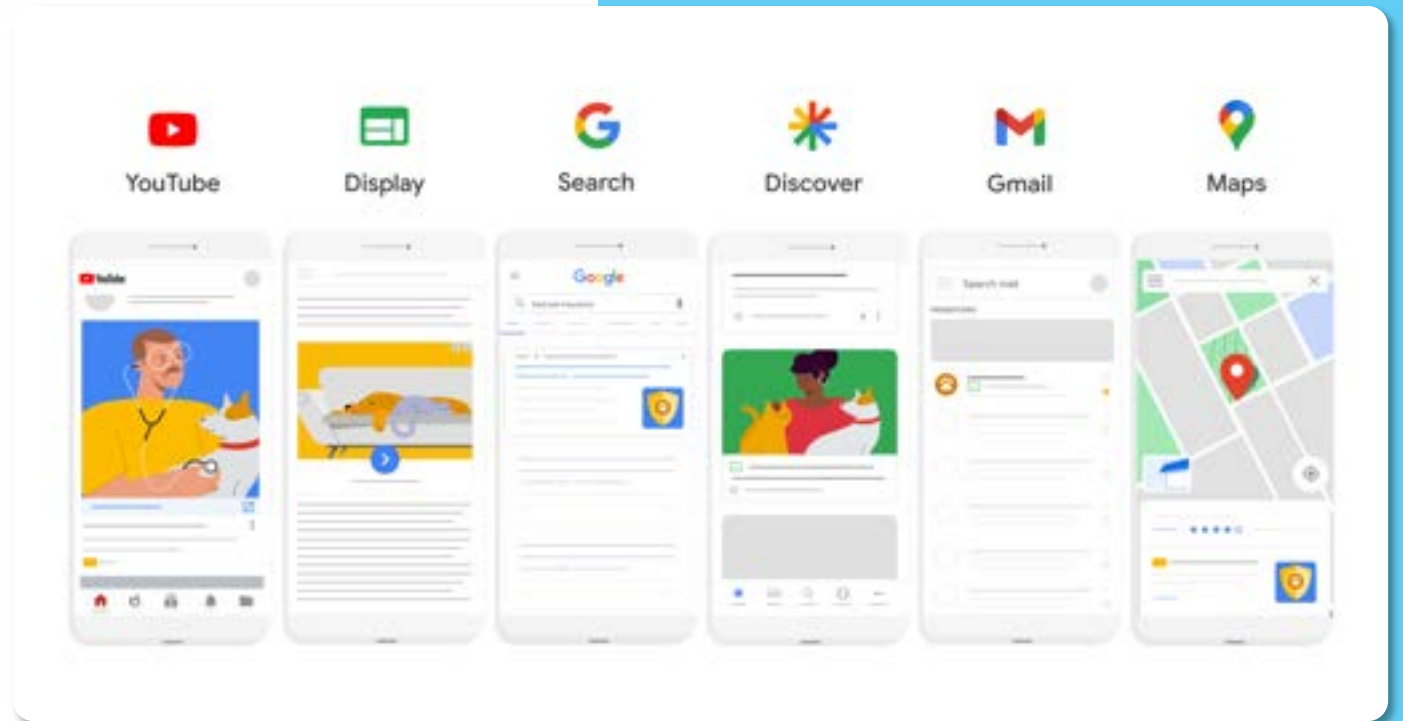
- With an intermediary like Zapier, you can stop manually extracting Klaviyo email data by automating your data integration to unlock powerful growth remarketing possibilities on Pinterest
- Re-engage existing customers and engaged users with hyper relevant Pins to drive revenue



Google Ads

# Performance Max

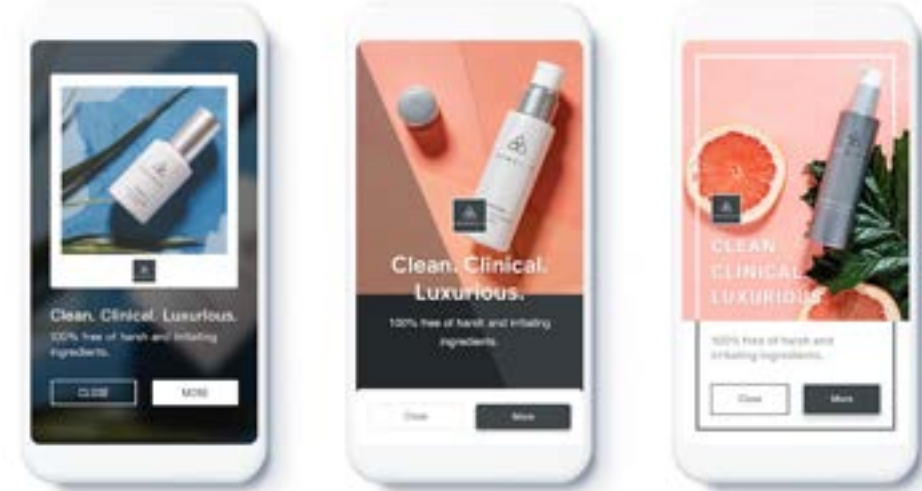
- Performance Max campaigns need *audience signals* to guide Google towards the right users.
- We can integrate Klaviyo audience segments within Pmax campaigns to push the campaigns towards VIP users, cart abandoners, past purchasers, and more.



Google Ads

# Display & Discovery

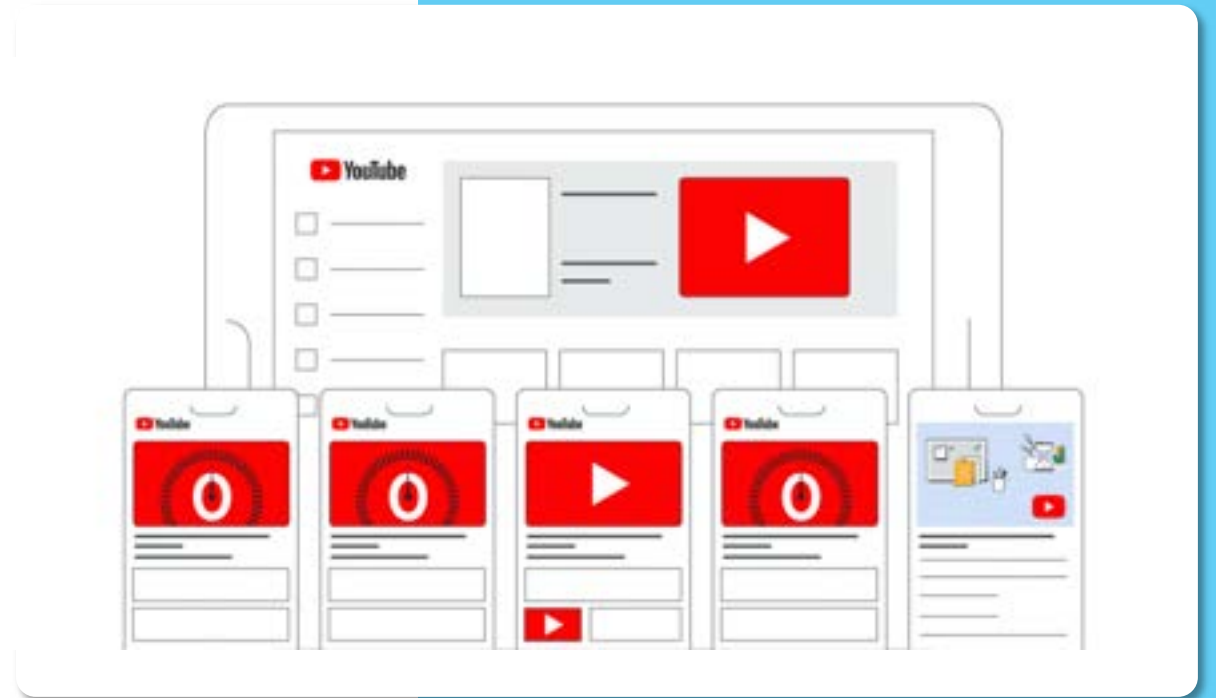
- Remarket to Klaviyo audience segments through Display and Discovery campaigns.
- Utilize non-purchasers & past purchasers, and more to drive revenue through these highly visual ad placements across the Google Display Network (GDN).
- Create audience signals within Discovery campaigns to guide the campaign towards remarketing users.



## Google Ads

# Video

- Utilize Klaviyo audiences within Video Action campaigns to remarket your brand's strongest value props to engaged users.
- Use targeted copy within your video campaigns based on the Klaviyo audience segment
- Layer in your Merchant Center feed to remarket products that users browsed on the site, which can increase CTR

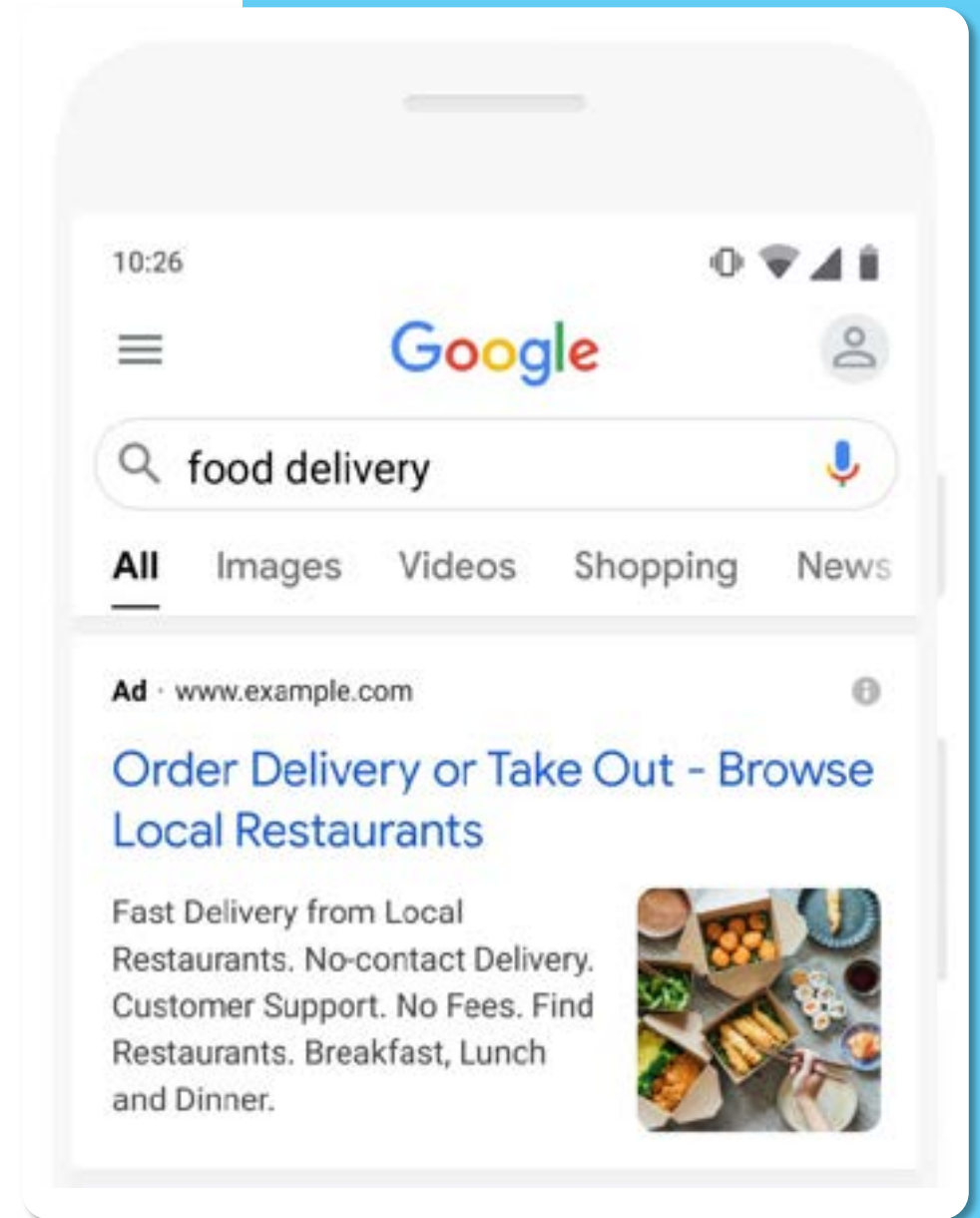




Google Ads

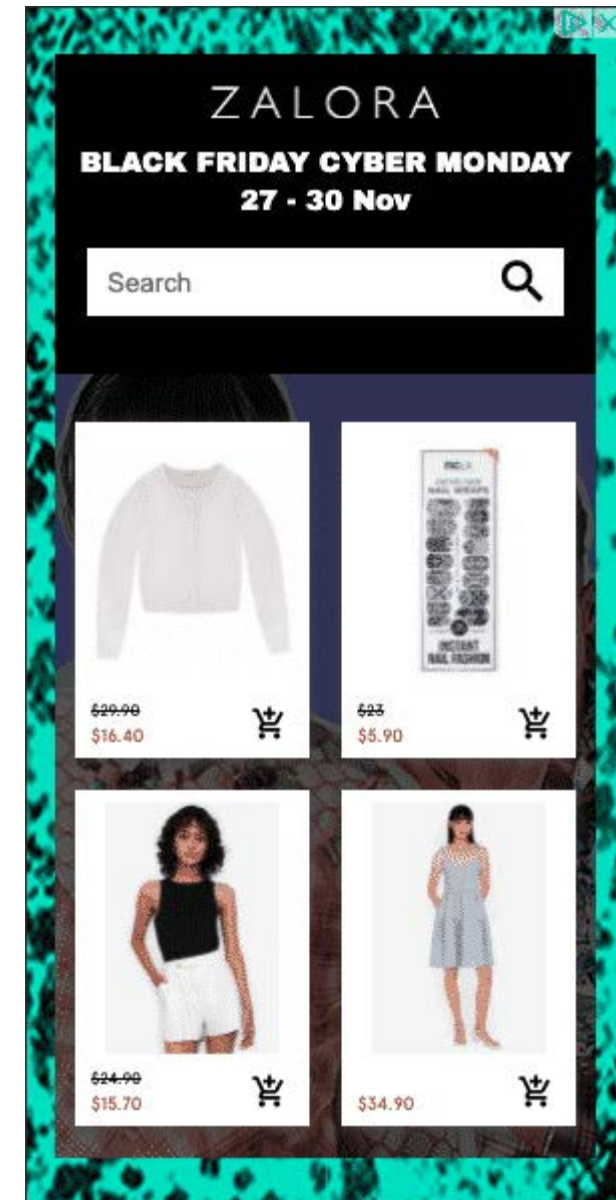
# Search

- Optimize your search campaigns by having Klaviyo audience segments set to observation mode in the background.
- Utilize the observed data for further strategizing with display, discovery, and video campaigns.



# Criteo

- Integrate Criteo and Klaviyo to seamlessly send audiences from Klaviyo to Criteo.
- Re-engage existing customers and engaged users with hyper relevant programmatic ads that promote product discovery.
- Utilize Criteo's entire catalog of ad types to drive traffic and conversions.
  - Showcase
  - Dynamic
  - Native
  - And more!





# Pushing Database into Loyalty + Advocacy Activities



**Every integration and tactic you're about to see have the power to create new profile segmentation points that can power enhanced digital interactions**





# Convert more customers from the start

## 01

### Quizzes & Surveys

Boost site engagement

- while collecting valuable zero party data to use for better segmentation

## 02

### Onsite Personalization

Recover abandoned carts

- by delivering relevant product recommendations based on transactional and behavioral data

## 03

### Reviews & UGC

Build trust

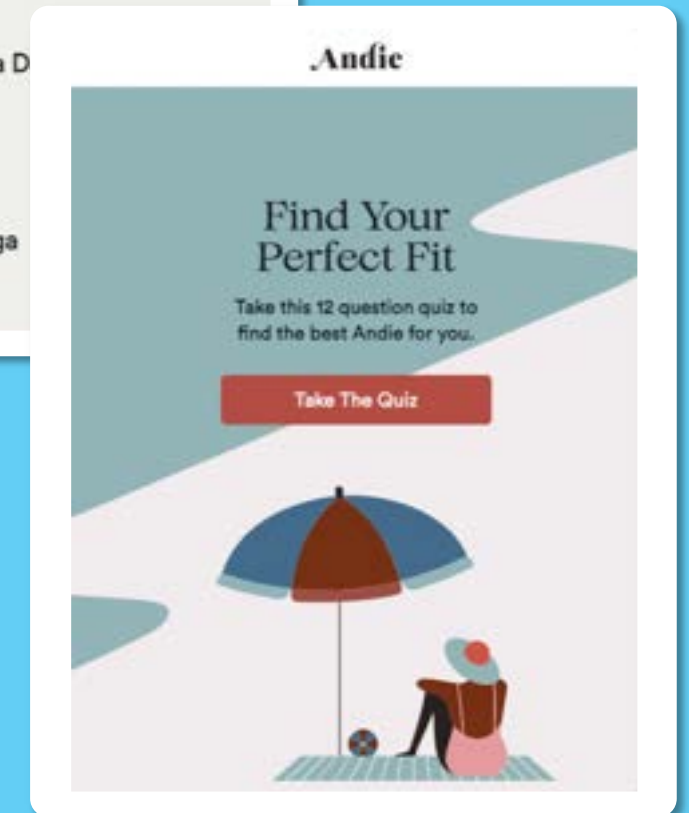
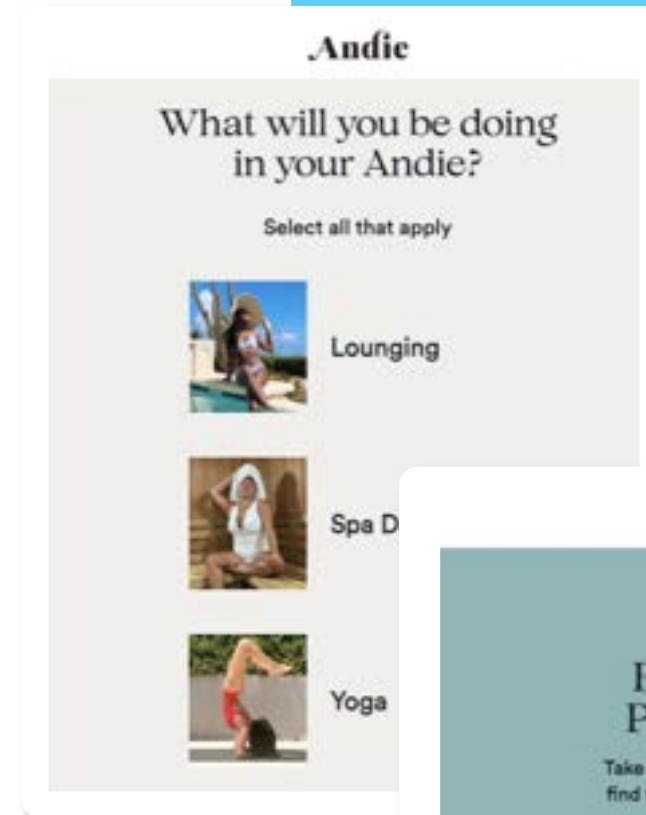
- by informing shoppers about your product/service before they purchase

01

# Quizzes & Surveys

Klaviyo Use Cases:

- Generate personalized product recommendations to use in email and SMS
- Create segments based off of quiz responses
- Automate flows to upsell and cross-sell based on quiz & survey responses

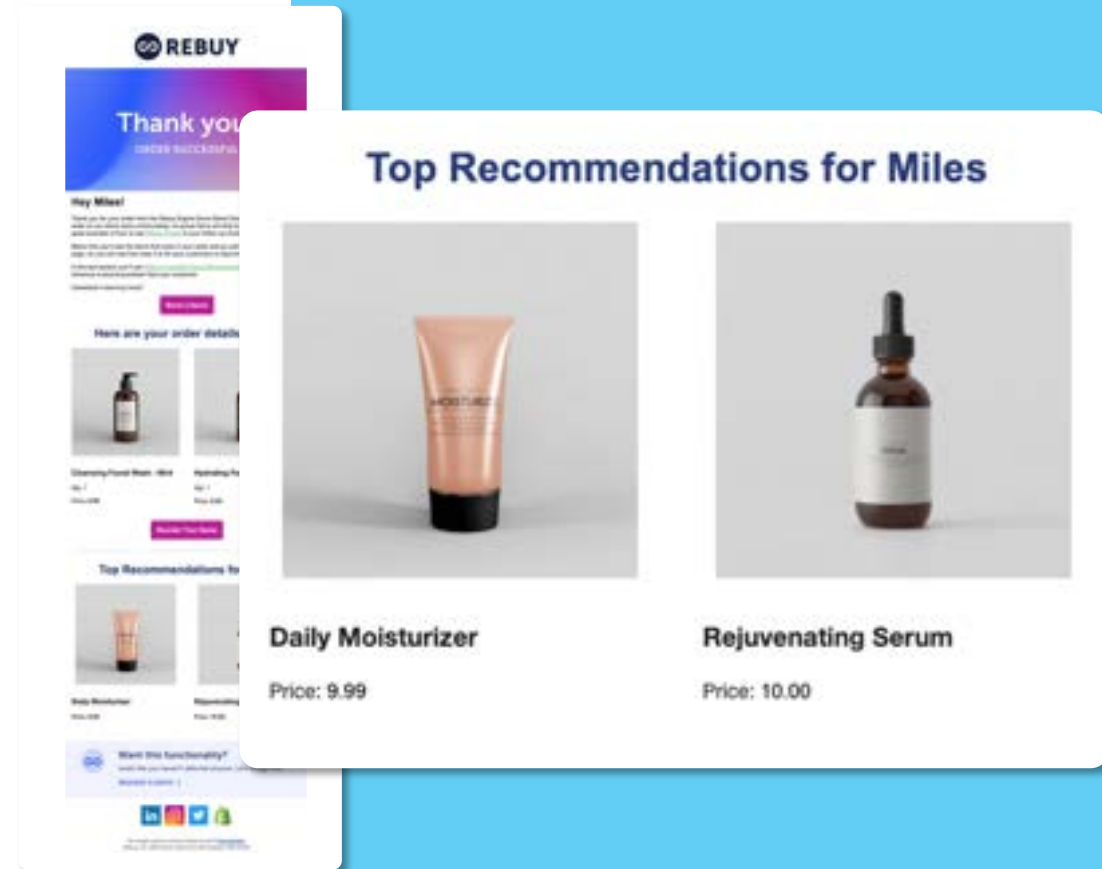


02

# Content Personalization

Klaviyo Use Cases:

- Feature dynamic product recommendations in email and SMS
- Sync segments to mirror on-site experiences off-site



03

# Reviews & UGC

## Klaviyo Use Cases:

- Automate review requests via email and SMS to collect more reviews
- Sync review data (i.e. star-rating and sentiment) to customer profiles to segment and trigger flows
- Display UGC to enhance emails and build trust in your product

**E** Emma Roberts [emma.roberts@hotmart.com](mailto:emma.roberts@hotmart.com)  
Created Okendo Review

**Body Shape:** Hourglass  
**Design:** 5  
**How It Fits:** Perfect  
**Is Recommended:** true  
**Language Code:** en  
**Overall Sentiment:** positive  
**Photo Count:** 1  
**Photo Urls:** <https://i.imgur.com/PU37h8L.jpg>  
**Product Name:** Dress - Red  
**ProductID:** 4183358079087  
**Quality:** 5  
**Rating:** 5  
**Review Body:** It suits my curves, it doesn't make me look bigger.  
**Review Title:** Simple summer dress  
**Reviewer Country Code:** AU  
**Reviewer Display Name:** Bob M.  
**Reviewer Full Name:** Bob McGee  
**Size Purchased:** 12 / L  
**Sizing:** 0  
**Source:** write-review-button  
**Usual Size:** 12 / L  
**Video Count:** 0



bazaarvoice



Pixlee TurnTo  
An Emplifi™ Company

ShopperApproved

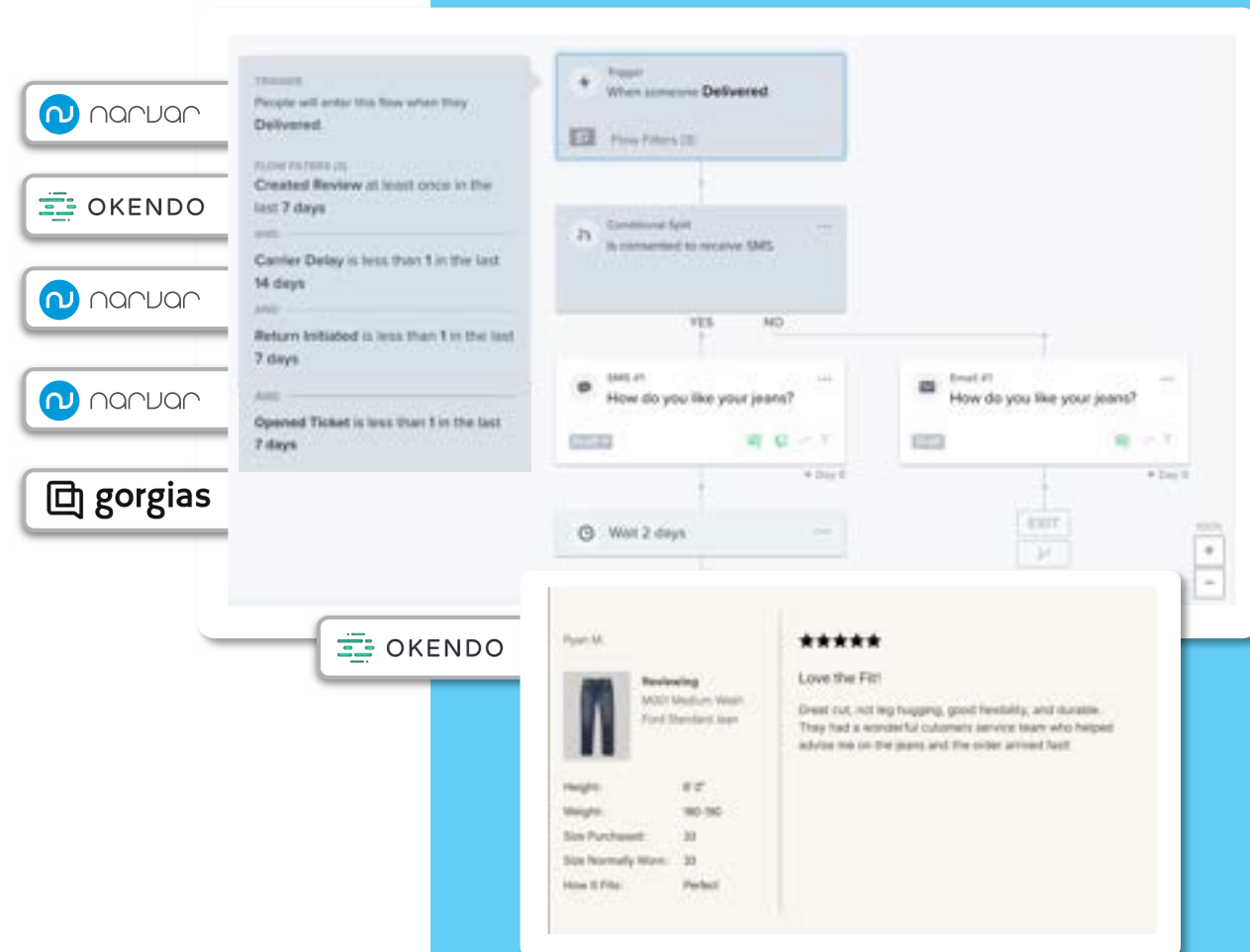


klaviyo



# Combine the power of integrations to...

- Trigger a product review flow to prompt customers to leave feedback once a shipment is marked as delivered
- Gain better reviews by filtering shipment events to ensure products have actually been delivered without carrier delays or returns
- Avoid asking for a review when a ticket is actively open about an issue with support
- Not sending the wrong message can be as important as sending the right message



# Keep Your Customers Coming Back

01

## Subscriptions

Reduce friction

- for the customer by automatically placing and delivering conveniently timed orders, plus offer bundling discounts

02

## Returns

Recover lost revenue

- by streamlining exchanges and store credit, overall maximizing recovered ROI and minimizing the cost of the returns process

03

## Reviews & UGC

Gamify the customer experience

- with redeemable points and rewards to encourage repeat purchases

01

# Subscriptions

Klaviyo Use Cases:

- Automate subscription updates for current subscribers
- Cross-sell complementary items for current subscribers
- Convert non-subscribers with post-purchase flows
- Prevent active subscribers from receiving marketing communications for items they already subscribe to

 **recharge**    **ordergrove™**   **skio**

 **EXCLUSIVE:**  
exclusiveconcepts.com

**klaviyo**



02

# Subscriptions

Klaviyo Use Cases:

- Automate return processing emails and texts to keep customers up to date
- Provide product recommendations and discounts when a customer is issued store credit
- Drive incremental revenue when a customer returns something with exchange incentives



## Longsleeve T

Exchange for new size or color



Exchange for another item





03

# Loyalty

Klaviyo Use Cases:

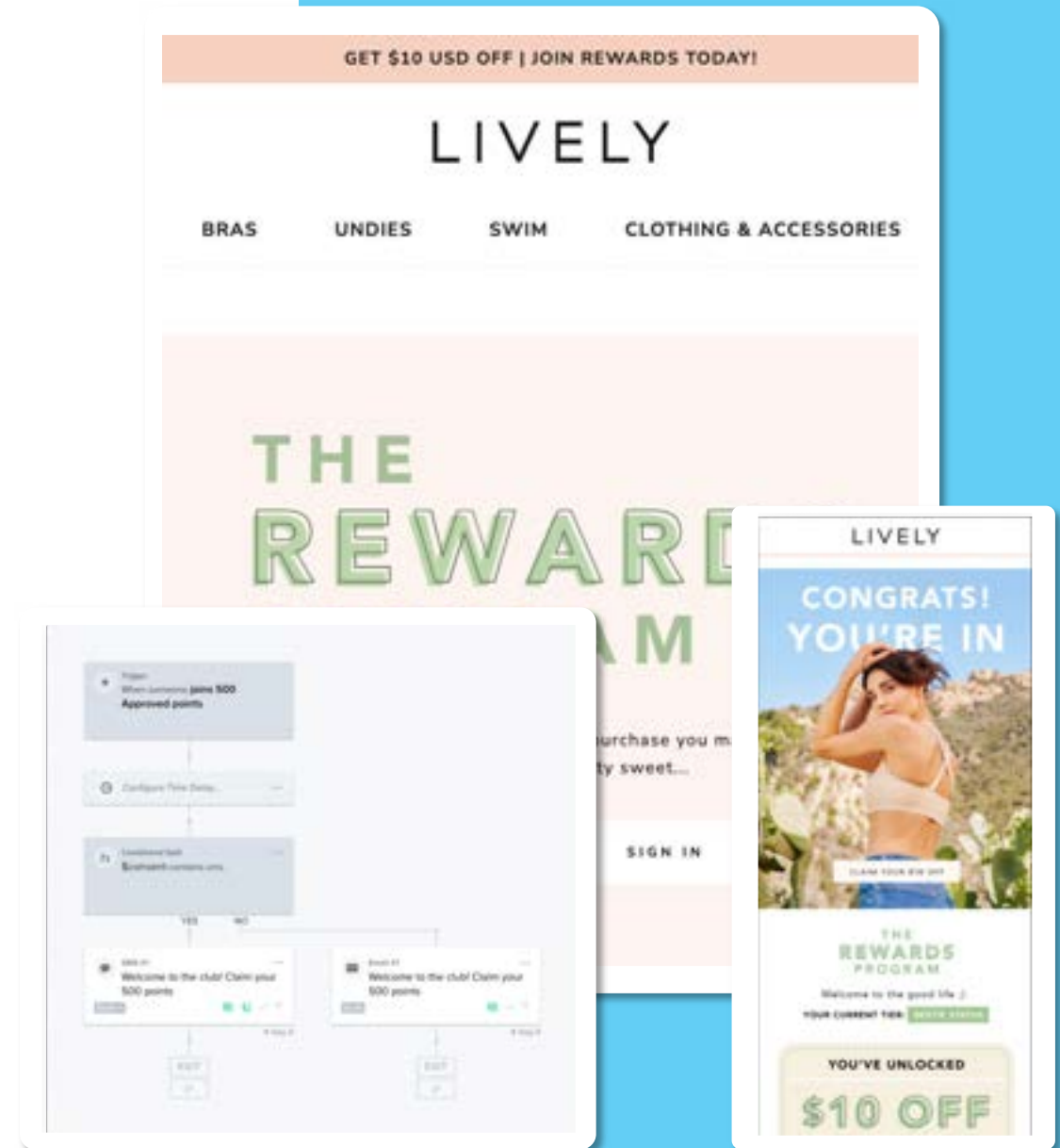
- Welcome new members to your loyalty program with an automated Welcome Series
- Provide automated updates to members when tiers change, points are earned, or points are expiring
- Reward VIPs with exclusive discounts and offers when they reach a certain tier or status
- Sync loyalty data in customer profiles to segment your most loyal customers



friendbuy



klaviyo



# Build sustainable growth by reaching new audiences

01

## Influencer Marketing

Enable and incentivize

- brand advocates to introduce new leads and drive incremental sales

01

# Influencer Marketing

Klaviyo Use Cases:

- Identify your brand advocates and invite them to join your influencer program
- Sync social media data via custom profile properties
- Set up triggers when someone mentions you on social media to send them a thank you or reward
- Include influencer content in your email and SMS campaigns

**GATSBY**

 **Refersion**

 **GRIN**

 **EXCLUSIVE:**  
exclusiveconcepts.com

**klaviyo**



**An EXCLUSIVE  
Offer**



**POLL:**



How can Klaviyo and EXCLUSIVE help you further your holistic email needs?

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**I don't use Klaviyo but I want it - if selected, Klaviyo will reach out to you**

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**I use Klaviyo but need help with strategy - if selected, EXCLUSIVE will reach out to you**

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**Nothing right now, thanks**





# QUESTIONS

Now it's your turn