

# KLAVIYO // PARTNERS

Program Changes FAQ



## Why are we changing the program?

We are redesigning and relaunching the Agency Partner Program to better align our partners goals with our customers' needs.

### Goals for the new program:

- Personalize program
- Support partner growth
- Improve customer success
- Engage strategically
- Align benefits with partner goals

## What is changing?

### Program structure

Historically, all partners have been grouped into one bucket and tiers have been determined solely by how much MRR is being referred. The new program structure accounts for the different roles that partners play to help drive success for our mutual customers.

Partners will now be organized into three tracks, based on each partners' unique business goals:

### *Influencers*

Klaviyo's Influencer Track is designed for Klaviyo brand evangelists. This track enables affiliates to monetize their promotional efforts and earn commissions for each new Klaviyo customer referred. This program is intended for Klaviyo advocates who want to be rewarded for their referrals.

### *Advisors*

Klaviyo's Advisor Track is designed for agencies looking to expand their business and provide Klaviyo customers with complementary marketing services — holistically supporting our mutual customers' success.

Complementary marketing services include, but are not limited to: SEO, SEM, Facebook ad management, web development, UI/UX, CRO, Amazon channel management, creative, strategic consulting, brand development, content creation, data migration, system integrations, etc.

### *Masters*

Klaviyo's Masters Track is designed for Agencies and Consultants that provide superior services and deliver results for clients using Klaviyo. These partners are supporting mutual customers on a regular basis (setup, support, campaign development, and customer success). These partners are Klaviyo experts.



# Updated agency partner benefits

■ Influencer 
 ■ Advisor 
 ■ Master

Partner tiers	Silver	Gold	Platinum
<b>AGENCY PARTNER BENEFITS</b>			
<i>Training and communication</i>			
Online training programs	✓	✓	✓
Unique affiliate link	✓	✓	✓
Partner portal access	✓	✓	✓
Partner Slack community	✓	✓	✓
Advance notice on product release	✓	✓	✓
1:1 Channel enablement		✓	✓
Access to Klaviyo leadership		Limited	Prioritized
Complimentary Klaviyo:BOS tickets		1	2
<i>Sales</i>			
One time bounty payout based on 4 months of accumulated rev (4 month min)	5%	10%	15%
Rev share % of influenced deal (duration)	10% (12 months)	15% (16 months)	20% (24 months)
Rev share % of managed account (ongoing)	2%	3%	4%
Klaviyo partner directory	Searchable	Listed	Prioritized
Leads from Klaviyo		Limited	✓



## Updated agency partner benefits (cont.)

■ Influencer
 ■ Advisor
 ■ Master

Partner tiers	Silver	Gold	Platinum
<b>AGENCY PARTNER BENEFITS</b>			
<i>Marketing</i>			
Klaviyo partner badge	✓	✓	✓
Access to Klaviyo marketing collateral	✓	✓	✓
Sponsored social events		✓	✓
Klaviyo blog submission		Accepted	Prioritized
Joint case study submission	Accepted	Prioritized	Prioritized
Additional co-marketing activity opportunities		✓	✓
<i>Product and support</i>			
Access to product beta program		✓	✓
Product road map session		Limited	Prioritized
Advanced notice on product release	✓	✓	✓
Dedicated IP pools		Upon approval	Upon approval
Priority support	✓	✓	✓
Dedicated channel management		✓	✓
Dedicated customer success manager		✓	✓



# Updated agency partner requirements

■ Influencer 
 ■ Advisor 
 ■ Master

Partner tiers	Silver	Gold	Platinum
<b>AGENCY PARTNER REQUIREMENTS</b>			
<i>Membership qualifications and commitments</i>			
Application approval	✓	✓	✓
Contractual obligations	✓	✓	✓
Klaviyo Influencer certification	✓	✓	✓
Klaviyo Advisor certification	✓	✓	✓
Klaviyo Master certification	✓	✓	✓
<i>Sales and account management</i>			
Minimum MRR referred		\$5K MRR	\$10K MRR
Sales lead acceptance		2 Bi-annually	4 Bi-annually
Minimum MRR managed	\$800 MRR	\$7.5K MRR	\$15K MRR
Review managed accounts	✓	✓	✓
<i>Marketing and communication</i>			
Visibility of Klaviyo brand on website	✓	✓	✓
Klaviyo advocate / referral		1 per year	2 per year
QBR (quarterly business review)		✓	✓



**What is the timeline for this new program and when do these changes go into effect?**

**April 2** // Program-wide program changes communications

**April 15** // Agency town hall [webinar]

**April 15** // Open enrollment period begins

- Track identification page goes live
- Training becomes available

**June 11** // Deadline for track and tier requirements

**Who do these changes affect?**

These changes apply to all partners in the Klaviyo partner ecosystem

**What do I need to do and when?**

**Identify your track**

- When you sign into the partner portal, you will find a page dedicated to track selection.
- Review the tracks and submit your selection to have access to a new portal experience
- Please note: you can only submit your track selection once.
- **You must identify which track you belong in before June 11, 2019.** If you do not make a selection, you will be automatically placed in the Influencers track.

**Review and accept the updated partner agreement**

- When you identify your track, you will be asked to confirm you agree to the new terms of the program.

**Enroll managed customer accounts (Master-Track only)**

- If you selected the Masters Track, your partner portal will be updated to include a new tab for 'Managed Customers'.
- Within this section, identify which Klaviyo customers you are currently managing by submitting their Klaviyo ID and uploading a copy of the signed SOW.
- Managed accounts can be identified on an ongoing basis.

*Further instructions on what you need to do and when continue on the next page.*



## What do I need to do and when? (Cont.)

### Complete the training

- Once you've identified your track, access the LMS under the "Partner Training" tab in the portal to begin fulfilling your training requirements.
  - **Influencers training requirements**
    1. Klaviyo-at-a-glance
      - The goal of this course is to enable partners with a basic understanding of Klaviyo's value proposition. These modules cover: identifying an ideal Klaviyo customer, how Klaviyo helps clients achieve their business goals, and competitive positioning. Upon completion, partners should walk away with an understanding of who Klaviyo is and why clients should choose Klaviyo.
  - **Advisor training requirements**
    1. Klaviyo-at-a-glance
    2. Foundational product knowledge
      - The goal of this course is to enable partners with a basic understanding of how the product works. The modules in this course will provide partners with more strategic proof points to help sell clients on Klaviyo. These modules cover: integrations, segmentation, and different methods to engage customers. The course concludes with a situational case study to help convert virtual trainings into real-life examples.
  - **Master training requirements**
    1. Klaviyo-at-a-glance
    2. Foundational product knowledge
    3. Advanced product knowledge and customer management tactics
      - The goal of this course is to enable partners with a deep, strategic understanding of Klaviyo. The modules in this course will cover: advanced product functionality, how to support and manage Klaviyo customers, and best practices for elevating your clients' marketing strategy.



**What is the annual schedule for reviewing track and tiers?**

Reviews will occur on a bi-annual basis

- **June 30** // Cut off for H1 training / MRR compliance
- **July 15** // Updated tier and track communications
- **December 31** // Cut off for H2 training / MRR compliance
- **January 15** // Updated tier and track communications

**Where can I find resources and who should I contact if I have questions?**

**Partner portal**

- The partner portal is going to be your #1 source of information as these changes occur. You can access the portal at [partners.klaviyo.com](https://partners.klaviyo.com)

**Partner email alias**

- For any questions that aren't mission critical, shoot a note to our [partners@klaviyo.com](mailto:partners@klaviyo.com) and someone from the team will get back to you as soon as possible

**Partner Slack community**

- The Klaviyo | Agency Slack channel was created to share ideas and develop a community within the context of, and with assistance from, Klaviyo. The goal of the channel is to enable partners to grow through a more active, forum-based form of communication, and to provide support and news as a community.
- If you do not have access to the agency slack channel, please reach out to [partners@klaviyo.com](mailto:partners@klaviyo.com) and we'd be happy to send you an invite.





## Masters-Track specific content

**What are the requirements for recognizing that my agency is managing a Klaviyo customer?**

In order for Klaviyo recognize that your agency is managing an account, we will need the Klaviyo account ID, proof of services provided as well as commitment length, and the necessary points of contact from the customer and the agency for any follow up.

**If I'm in the Masters Track and provide my point of contact, will Klaviyo ever contact them?**

Yes. A channel manager will contact the agency first and provide 24 hours notice prior to reaching out to the customer. The channel manager will be checking in with the customer to see how the experience is going with Klaviyo as well as to verify services with the respective agency. We may also reach out to get brand approvals for marketing purposes.

**What are the requirements for the Proof of Services for a client my agency is managing?**

The Proof of Services should be a document outlining the scope of work (SOW), retainer agreement, or any formal services agreement between the Agency and the Klaviyo Customer. The document should include services being provided, the contracted services length, and should be signed/approved by the client. Services should, at a minimum, should include management of a Klaviyo account and be 6 months in length.

**When does Klaviyo send payments?**

### ***Influencers***

Once the customer has accrued four subscription months of billing, Klaviyo will pay a one time referral fee based on the total accrued business. The fee will be paid out within 60 days of the accrued business.

### ***Advisors***

Once the customer begins paying for Klaviyo's platform the agency will be paid out quarterly based on the accrued monthly payments. The tier level within the program at the time the account initially sells will help to determine the percentage payout and the duration of the payment for the agency.

### ***Masters***

For accepted leads submitted by a Master, once the customer begins paying for Klaviyo's platform the agency will be paid out quarterly based on the accrued monthly payments. The tier level within the program at the time the account initially sells will help to determine the percentage payout and the duration of the payment for the agency.



## Masters-Track specific content

### When does Klaviyo send payments? (Cont.)

For accepted Klaviyo accounts that your agency is managing, Klaviyo will pay out benefits annually. The tier level within the program at the time the account is accepted will be the respective payment amount. The revenue share will be based on the total accrued subscription billing within the length of time that they are under the agencies management in the calendar year.

### Is there a minimum amount for payments?

#### *Influencers*

There is no minimum for payments for Influencers

#### *Advisors*

There is a quarterly minimum of \$200 that must be met. If that is not met after the first potential quarter of payout, the amount will be held until the following quarter. Regardless of the payout amount Klaviyo will pay the partner out in the proceeding quarter.

#### *Masters*

For referred business there is a quarterly minimum of \$200 that must be met. If that is not met after the first potential quarter of payout, the amount will be held until the following quarter. Regardless of the payout amount Klaviyo will pay the partner out in the proceeding quarter.

For managed business there is no minimum on the annual payout.

### How long is revenue share valid?

#### *All tracks*

Please refer to your respective tier and program matrix.





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