

# The beginner's guide to B2C CRM

Marketing

Service

Analytics

Data platform

Everything B2C marketers need to know about rising customer expectations, and the strategies and technologies you need to build better relationships at scale

# What's coming up?

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Rising consumer expectations have completely changed B2C tech stack needs

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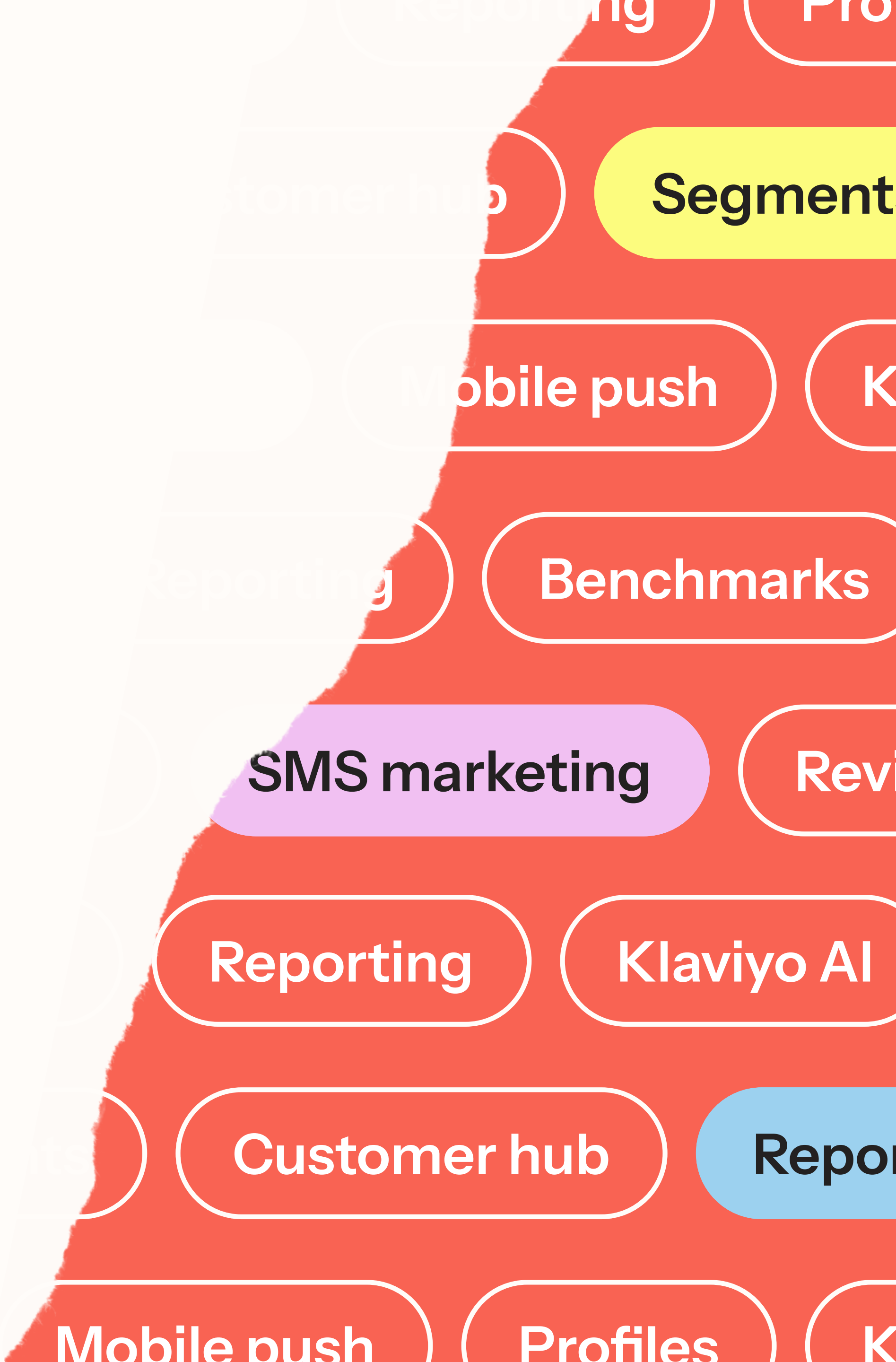
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## INTRODUCTION

# Today's consumer expects more

## Rising consumer expectations have completely changed B2C tech stack needs

The modern [customer journey](#) extends far beyond the transaction—it's an intricate web of interactions that shape brand perception, loyalty, and lifetime value. Today's consumers shop online, engage across multiple channels, and expect instant, personalized service.

Imagine a world where you effortlessly meet your customers' expectations by:

- Recognizing their journey stage, preferences, and pain points
- Delivering tailored messages and proactive service without delays
- Resolving their issues seamlessly across marketing and service
- Building relationships that transform customers into lifelong advocates

This is the future B2C leaders must strive for, and at Klaviyo, we're here to help you power smarter digital relationships to create top-notch experiences with your customers at scale. Throughout this guide, we'll bring in insights from our [future of consumer marketing report](#), a recent survey of over 8,000 global consumers on what they want from brands in 2025.



# Subpar tooling causes B2C brands to spend big and fall short on experience

A CRM—customer relationship management system—is one of the most important tools in any business’s tech stack. But traditional CRMs were designed for B2B businesses and their long, slow sales cycles, not the millions of fast-moving consumers that B2C brands manage.

Too often, businesses rely on individual point solutions for marketing, service, analytics, attribution, and data storage. These disjointed systems are not only costly to set up, costly to connect, and costly to maintain, they also prevent brands from providing the personalization customers crave. When a customer can feel your disconnected systems in their interactions with your company, they lose trust. And trust, once lost, is very hard to win back.

**1 in 5 buyers**

stop buying from a brand after a single negative experience.\*

[Klaviyo’s Future of Consumer Marketing Report](#)

**\$100,000–\$500,000**

is how much 43% of ecommerce executives spend on their tech stacks annually.

[Klaviyo/BWG Strategy survey](#)

# What customers expect

According to Klaviyo's Future of Consumer Marketing report

01

## A seamless omnichannel experience

33% of buyers say their biggest frustration when shopping the same brand in multiple places is inconsistent pricing or promotions on different channels.

02

## Personalization at every touchpoint

74% of consumers expect brands to provide more personalized experiences in 2025.

03

## Brand value alignment

42% of buyers say that a brand's values matter more to them than they did a year ago, and 66% expect brands to make them feel valued and understood.

04

## Excellent customer service

1 in 5 buyers say that excellent customer service is why they stay loyal to their favorite brands, and 92% expect a response within 24 hours after a negative experience with a brand.



# Where brands fall short

01

## Accurate identification of customers

70% of marketing leaders report that identifying audiences across multiple touchpoints is more difficult than ever.

02

## Siloed data

66% of marketing leaders report using 16 or more martech solutions. Disconnected systems that store data in silos prevent brands from personalizing at scale.

03

## Message testing challenges

41% of B2C marketing leaders say their biggest challenge is personalizing their communications and interactions, and 34% say it's driving decision-making with customer insights.

04

## Outdated service operations

Customer service tools that are siloed from key customer data means service agents can't see full customer context when responding to issues.



## THE VISION

# Capturing attention in a fragmented world

## How B2C brands can stand out in today's market

Meeting buyer expectations may seem like a daunting challenge, but a B2C CRM eliminates much of the heavy lifting so you can focus on the activities that actually matter.

Each and every buyer has unique needs and goals, whether they're discovering your brand for the first time, considering a purchase, or returning as a loyal fan. From [email marketing](#) to customer service to SEO to paid ads to SMS marketing and more, hundreds of touchpoints make up a customer's experience with your brand.

The best B2C brands bring together all their customer-facing activities and consider them holistically in order to serve modern buyers. This requires [first-party data collection](#), cross-channel personalization, and real-time engagement at every stage of the customer journey.



# Awareness

Buyer attention is more fragmented than ever. At the same time, customer acquisition costs have risen by 60% over the last several years, and marketing teams are shrinking, facing pressure to do more with less. To attract new visitors and grow subscriber lists, brands need to build helpful awareness channels that are optimized for conversion.

## Once buyers find you, increase speed to purchase with sign-up forms

Tata Harper, a pioneering, plant-based skincare brand, used Klaviyo to grow their subscriber audience. After consolidating their siloed tech stack, the Tata Harper team built sophisticated AI-powered tests to optimize their email and SMS sign-up forms. 30 days after the top-performing version of their form went live, submissions jumped 65%, and welcome flow revenue grew 27%.

# What customers expect

(According to Klaviyo's Future of Consumer Marketing report)



## Retail/ecommerce

1. Organic social media: **29%**
2. Web browsing and/or search engines: **23%**
3. In-person browsing: **15%**



## Wellness/personal service brands

1. Web browsing and/or search engines: **22%**
2. Organic social media: **18%**
3. In-person browsing: **15%**



## Hotels

1. Web browsing and/or search engines: **41%**
2. Organic social media: **13%**
3. In-person browsing: **10%**



## Restaurants

1. Word of mouth: **21%**
2. Web browsing and/or search engines: **19%**
3. Organic social media: **17%**

“

Klaviyo is one of the more powerful marketing platforms I've seen in my 20+ years in the industry. The platform's turnkey solution enables brands to easily leverage their customer data and utilize AI to make real-time optimizations, drive strategy, and stay at the forefront of marketing.

HEIDI JESSOP-MAUND, SVG OF DIGITAL



TATA HARPER®



# Consideration

Just as buyers discover brands on a multitude of channels, they also seek out different types of information when considering potential purchases. Brands need to meet buyers where they are and provide the resources they rely on for research. This means ensuring messaging alignment across multiple channels as well as thoughtful nurturing that helps customers reach a decision.

## Across B2C industries, three factors influence buyers most when researching new brands

(According to Klaviyo's Future of Consumer Marketing report)

1. Customer reviews and feedback
2. Competitive pricing and/or discounts
3. Product descriptions and/or photos

## Optimize campaigns to maximize on high-traffic moments

Fishwife is a multimillion-dollar omnichannel brand that sells responsibly-sourced tinned fish. Ahead of an appearance on Shark Tank, CEO Becca Millstein knew she needed to prepare for the traffic they would get after their appearance. Through extensive A/B testing of email campaign layouts, new product education for category newbies, and an optimized SMS funnel, Fishwife saw 110% YoY growth in revenue from Klaviyo the month their episode aired.

“We do so much with DTC. We launch our new products on DTC. We launch collaborations on DTC. We're constantly changing and iterating on our ecommerce site, and Klaviyo allows us to share all our messaging points with our customers without overwhelming them.

BECCA MILLSTEIN, CO-FOUNDER AND CEO

*Fishwife*



# Decision

Personalization is table stakes in 2025. Brands that market to dynamic segments based on ever-evolving customer behavior—then target those segments with campaigns that contain personalized content and recommendations—will always win over those that rely on generic, batch-and-blast engagement tactics.

**1 in 4 consumers**

remember a brand providing exclusive discounts or personalized offers in the past 6 months.

Klaviyo's Future of Consumer Marketing report

## Lean on AI for sophisticated segmentation

Force of Nature empowers consumers to make their own all-in-one cleaner and medical-grade disinfectant from natural ingredients. The brand sells a variety of different starter kits, capsule packs, and capsule subscriptions. That means defining a segment of kit buyers who haven't bought a capsule subscription, for example, involves including and excluding buyers of long lists of SKUs. The team relies on Klaviyo AI to build these segments with minimal manual work.

“Segments AI makes it quick and easy to build segments with as much precision as we need.

**MELISSA LUSH, CMO FORCE OF NATURE**



# Purchase, use, and customer service

Mistakes happen in business—packages get delayed or lost, restaurants get orders wrong, products break in transit. These negative customer experiences are almost inevitable. What separates good brands from great brands is how they behave in the aftermath.

**\$3.7 trillion in global sales**

is at risk due to poor customer service

Qualtrics XM Institute

## Increase customer lifetime value with an engaging post-purchase experience

Balance Me, an award-winning skincare line, developed email campaigns on Klaviyo to drive repeat purchases, such as replenishment reminders and product-specific cross-selling emails that teach customers how to improve their skincare routines and suggest complementary products. This helped Balance Me increased repeat purchases by 83%.

“

There are limitations with what you can do and how you can communicate with your audience without the detailed customer data Klaviyo provides. Moving to the platform opened up a world of segmentation and personalization that meant we could communicate with our customers in a much more authentic way.

REBECCA HOPKINS, CO-FOUNDER  
BALANCE ME



# Retention

A customer's first purchase with your brand should be the start of a lifelong relationship. To transform one-time buyers into enthusiastic brand advocates, a brand's post-purchase experience must be as personalized and thoughtful as its pre-purchase experience.

Creating personalized experiences for key buyer segments, promoting hyper-relevant products based on past purchase history, and personalizing messaging based on customer behavior are just some of the ways that brands can drive customer loyalty. Robust analytics and sophisticated predictive AI help brands optimize these retention plays at scale.

**7 in 10 consumers**

are only loyal to 1-5 B2C brands

Klaviyo's Future of Consumer Marketing report

## Increase product subscription sign-ups with a 6-month post-purchase flow

Zero Co, which makes personal care and cleaning products, has used Klaviyo and Shopify to score an 80% customer retention rate. They built out a 6-month post-purchase flow to boost product subscription uptake, and deployed advanced replenishment flows that prompt customers to repurchase when they're running low on a specific product. Zero Co has seen a 40% increase in average weekly subscription sign-ups since starting with Klaviyo, and earned 60% of their revenue from subscriptions in 18 months.

“

Klaviyo has been one of the key tools we've used to manage customer retention, with the ability to segment audiences and talk to different people about our different types of offers, products, and impact initiatives.

MIKE SMITH, FOUNDER

**ZERO<sup>co</sup>**





# What B2C brands need to do to stand out in today's market

01

## Unify customer data into a single platform.

Klaviyo B2C CRM is powered by the [Klaviyo Data Platform](#) (KDP), a powerful data management solution that simplifies personalization for marketers and non-technical users. Every customer gets KDP free, offering a real-time view of customer interactions across marketing, analytics, and service. For many, KDP serves as an embedded customer data platform (CDP), consolidating their tech stack for greater efficiency and cost savings.

02

## Create multichannel experiences.

Klaviyo Marketing brings not just email and SMS, but also mobile app and [customer reviews](#), into one platform. Activate data from any source to maximize customer engagement, reach the right people—at the right time and in the right place—and leverage AI and smart insights for faster execution and better results.

03

## Align marketing and service.

Customer Hub transforms your Shopify store into a powerful, all-in-one customer experience center seamlessly built on top of your existing storefront. Now in public beta, it combines shopping, support, and [personalization](#) into a unified, signed-in experience, giving customers everything they need in one place to manage orders, discover new products, and get help. And best of all, Customer Hub is built-in to Klaviyo B2C CRM. It can be switched on and configured in minutes, requires no extra development time, and is designed to be mobile-first.

04

## Convert data into actionable insights.

Klaviyo Analytics is our new standalone product that enables brands to make better, data-driven decisions, within minutes. Customers can understand data in the context of the broader customer journey, personalize at scale through dynamic flows and segments based on product and [RFM analysis](#), and analyze business, product, and marketing performance with conversion dashboards.

05

## Leverage AI to build consumer-driven, not brand-driven, interactions.

With a complete understanding of each customer's preferences and purchase history, businesses can tailor their marketing messages and offers to each customer's needs. AI-driven features elevate the brand experience by automating personalized recommendations and anticipating customer needs, ensuring each interaction feels meaningful and relevant.



## THE SOLUTION

# Unifying the customer experience

## Connecting customer-facing interactions with a B2C CRM

A [B2C CRM](#), or business-to-consumer customer relationship management system, helps businesses manage their interactions with individual customers. With a B2C CRM, businesses gain a deep and actionable understanding of their customers' preferences, behaviors, and purchase history. This allows them to more easily and effectively personalize omnichannel campaigns, improve customer service, and boost sales.



# How does a B2C CRM help businesses scale?

01

**It drives more revenue while improving the customer experience.**

Good decisions require good data. A B2C CRM provides a single, unified view of customer data that brands can use to make smarter decisions driven by real insight, not their best uninformed guess.

02

**It increases team efficiency.**

Too many customer-facing teams rely on developers just to pull data or send a simple email. Your buyers move fast. Your brand needs to move faster.

03

**It reduces costs and consolidates tech stacks.**

The average B2C brand cobbles together more than a dozen tools. A B2C CRM eliminates the need for a developer, lowers licensing costs, reduces technology management overhead, and acts as a central source of customer data truth.

See your customers more clearly with Klaviyo B2C CRM

Get started

“

By unifying our data, Klaviyo has allowed us to identify high-risk moments in the customer journey and change behavior—all with one-click add-to-box functionality. These insights have been a game-changer. Because we better understand our customers—who they are, what they buy, how they behave—we can craft creative that more effectively engages specific segments and helps us drive long-term growth and build loyalty.

BILL HUDAK, VP OF DTC ACQUISITION AND RETENTION

**DOLLAR SHAVE CLUB®**



# Why Klaviyo built a B2C CRM

Klaviyo B2C CRM was designed to help brands keep up with their customers in the modern, omnichannel era. Klaviyo began as a database—a place for brands to understand and activate their data. As the industry moved away from a batch-and-blast email mindset, Klaviyo was on the forefront of that change with our fast, data-rich [email marketing](#) platform.

When customers asked for tools to connect the entire customer experience, Klaviyo built [SMS](#), [reviews](#), and [analytics](#) tools that helped brands deliver immediate ROI. As we look to the future, brands need a CRM that stitches together every moment of the customer lifecycle—which is why we developed Customer Hub, our first service offering.

**Klaviyo B2C CRM is the next leap forward:**  
a solution built to unify data, eliminate silos,  
and redefine growth for B2C companies.

“We’re reimagining how B2C brands manage customer relationships. We’re bringing together marketing, customer service, and analytics into a single, data-first solution. No more data silos. No more disconnected experiences. Just one unified view of your customer that powers everything. The future of B2C is unified, personalized, and built on trust. And it starts today with Klaviyo B2C CRM.

ANDREW BIALECKI, CO-FOUNDER AND CEO

klaviyo<sup>®</sup>



# Customer data

Today, customers discover and shop with ecommerce brands in many different places. This dizzying array of potential interactions that can inform future lifecycle marketing strategy is largely useless to brands unless they harness that data in a unified platform.

Every Klaviyo customer gets access to Klaviyo Data Platform (KDP) for free, enabling effective management and activation of their data.

KDP provides tools to enrich and transform data, run advanced reporting and predictive modeling, and sync data to outside systems. Klaviyo automatically creates [customer profiles](#) using identity resolution tools, so you can access and use every customer's data to personalize their experiences without worrying about duplicate records. With [350+ integrations](#) and flexible APIs available to all customers, you can bring together all your disparate datasets in one platform.

## What's different about Klaviyo Data Platform (KDP)?

01

### Lifetime profiles

The entire history of a customer's activity is available for personalization.

02

### Shared, cross-team data views

Use data for cross-functional campaigns, like flows to thank customers for recent reviews.

03

### Real-time data syncing

Use customer data for timely in-app push notifications, like when a customer walks into a physical store location.

04

### Vertical integration

Marketing and customer service teams can create segments and take action instantly within the same interface.





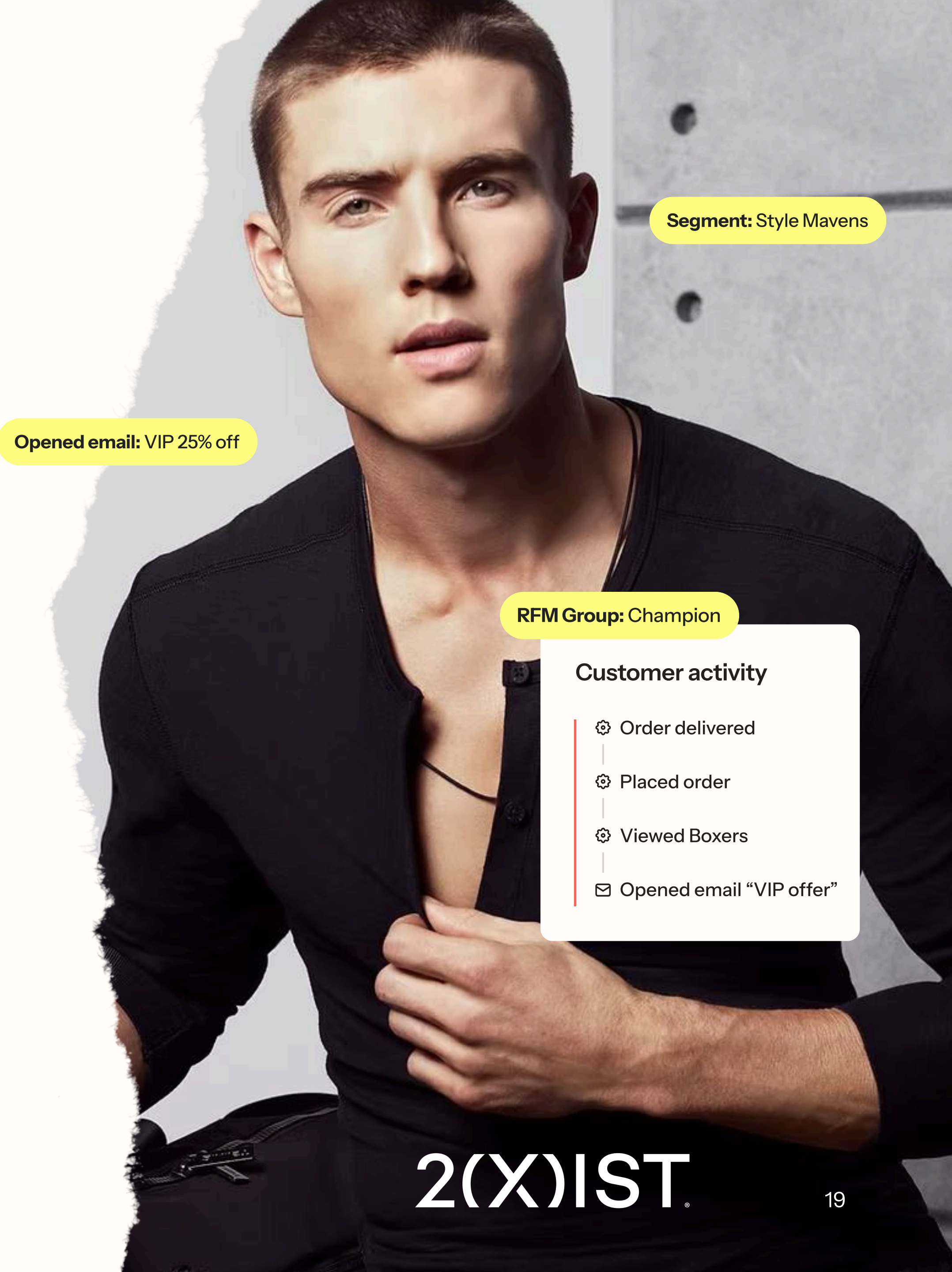
# 2xist drives repeat purchases with sophisticated analytics

2xist has been a leading name in men’s underwear for more than 30 years. The marketing team wanted to build an RFM-based discounting strategy for their email list, but could never find the right, user-friendly tool to power it—until Klaviyo Marketing Analytics.

It had the intuitive data visualizations, RFM segmentation, and powerful product analysis 2xist needed. Equipped with new insights, 2xist generated 56.1x ROI from Klaviyo in their first full paid quarter with Marketing Analytics, and restructured their Meta Ads strategy around RFM segmentation to drive 61% YoY growth in Facebook ROAS.

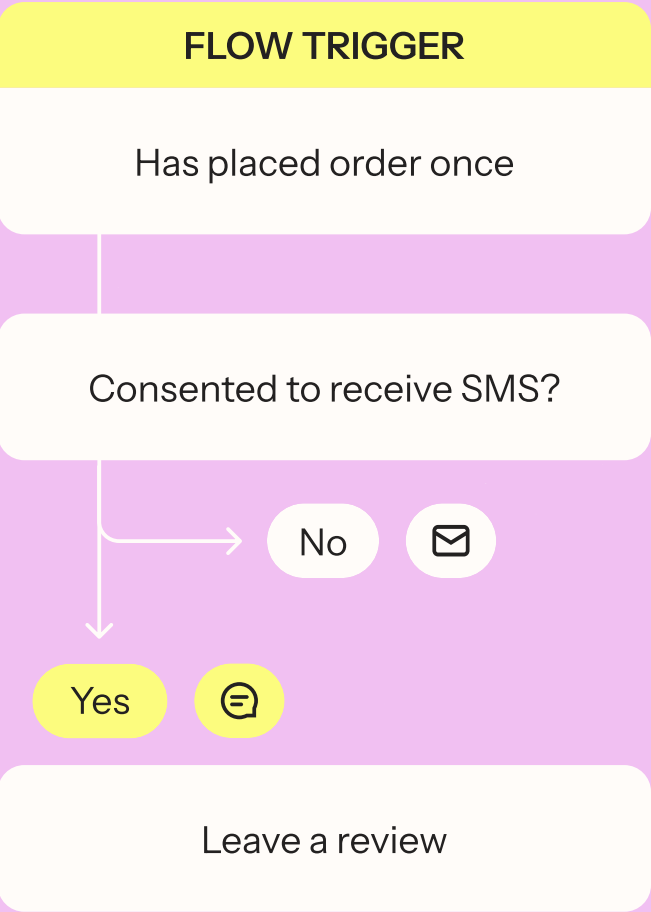
“The fact that we can have email, SMS, and Marketing Analytics all under one hood with Klaviyo helps with aligning data, pulling reports—everything. I’m not pulling 3 different reports from 3 different platforms and trying to connect the dots.”

CHRISTOPHER PEEK,  
DIGITAL MARKETING DIRECTOR, THE MORET GROUP



# Marketing automation

B2C brands handle millions of fast-moving transactions. At that rate, companies need to move quickly to ingest the steady flow of new customer insights to streamline marketing operations and run more effective campaigns.



## What’s different about Klaviyo Marketing?

01

### Deeper personalization

Boost engagement and reveal powerful insights with all your data in Klaviyo’s built-in data platform.

02

### Actionable insights

Drive better performance day after day with Klaviyo AI’s always-on insights and optimizations.

03

### Omnichannel momentum

Automate email, SMS, mobile push, reviews, and any other channels you integrate.

04

### Ease of use

Equip your team to make quick progress with pre-built templates and intuitive features. No coding required.



# Marketing operations

Working out of a consolidated system like a B2C CRM aligns teams, improves customer experiences, and eliminates the need for multiple tools. More easily manage everyday automation and operations, and high-traffic events like Black Friday Cyber Monday—all from one place.

## Helen of Troy slashes total cost of ownership by 40% with Klaviyo

[Helen of Troy](#) is a publicly-traded company, with a home and outdoor division composed of 3 major brands: [OXO](#), [Hydro Flask](#), and [Osprey](#). The division's former email and SMS provider required a prohibitive amount of developer support and upcharges to set up basic flows. Even simple functionality—like tracking SMS performance—proved impossible, and multi-channel flows were out of the question.

When the team shifted to Klaviyo, they were able to connect first-party data to marketing channels right away. Now, they use Klaviyo's integrations with Facebook, Google, and TikTok to build lookalike audiences to target, and exclude current email and SMS subscribers from paid acquisition campaigns. Since the migration, the team has saved [40% on total cost of ownership](#) and eliminated hundreds of IT tickets per year.

“With Klaviyo, we have email, SMS, and our CDP all in one platform. Less integration, less work, and less cost.

**ANTHONY S, VP OF DTC ECOMMERCE  
FOR HOME AND OUTDOOR DIVISION**

**Helen  
of Troy**

# Content marketing

Execute faster, more engaging campaigns with pre-built templates and intuitive workflows. Tools like drag-and-drop content builders, pre-built flows, and branded templates empower anyone on your team to create beautiful content campaigns more efficiently.

## Saranoni builds new messaging flows and elevates ROI

Saranoni, which makes cozy luxury blankets, adopted Klaviyo to improve their SMS and omnichannel flows. Saranoni's previous platform had a limited automation builder, so the brand only had a welcome flow and an abandoned cart flow, both email-only.

With Klaviyo, Saranoni was able to build 20+ flows, including a site abandonment flow, an SMS welcome flow, and a multi-channel low inventory flow. They've also launched several new welcome flow variants, tailored to different sign-up channels. The brand saw 35x ROI and generated 36% of Klaviyo-attributed revenue from flows in their first 6 months with Klaviyo.

“Because email and SMS play an important part in our business, it was crucial that we capitalize on these channels more

**STEPHANIE CONTRERAS, LIFECYCLE MANAGER**



# Marketing campaigns

In marketing, managing every moving piece together—in harmony—is no easy feat. Campaigns can be based on seasonal promotions, customer activities, strategic segments, new product releases, or ongoing re-engagement. With a unified CRM, you can align SMS, email, and push notifications, and control messaging based on customer groups.

Jordan Craig uses campaign data to build supercharged flows [Jordan Craig](#), a men's streetwear brand, had limited data access in their old email marketing platform. They were only able to see the performance of individual sends.

With Klaviyo, all that changed. Jordan Craig centralized and activated their data in Klaviyo to build complex multi-channel flows and integration-augmented sends. The results speak for themselves: [54% YoY growth](#) in revenue from email in the first 6 months with Klaviyo, with 30% of that email revenue attributed to automations.

“

Klaviyo is allowing us to build that personalized experience. It makes it so that whatever action a customer takes, there's an appropriate reaction. This level of personalization and optimization is definitely leading to revenue lift.

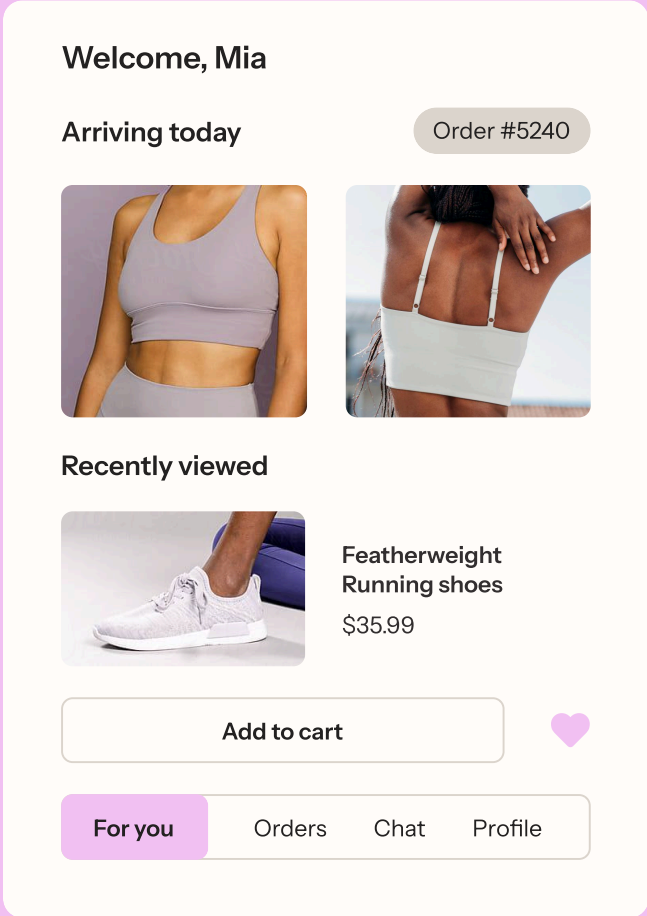
ROB VARON, DIRECTOR OF MARKETING



# Service

Today’s consumers expect quick resolution when they have a negative experience with brands. Our future of consumer marketing report reveals that:

- 43% expect a response from the brand within 24 hours
- 22% want a response within 1 hour
- 11% want to hear back within just 30 minutes



## What’s different about Klaviyo Customer Hub?

01

### Configure and get started in minutes

Can be switched on and configured in minutes and requires no extra development, since it’s built on top of klaviyo.js.

02

### Personalized customer accounts

Customers can track orders, manage subscriptions, and initiate returns and exchanges on their own.

03

### Drive incremental revenue

Shows unique promotion offers for customers, recommends additional products based on past purchases, and more.

04

### Deliver self-serve support

Customers can find quick answers and self-serve for basic questions like order tracking, returns, and more.



# Ministry of Supply drives 650+ self-serve support interactions with Klaviyo Customer Hub

Ministry of Supply, which makes “scientifically better” officewear, wanted a more sophisticated, on-brand customer account experience that complemented the shopping experience. After 4 months using Klaviyo Customer Hub, Ministry of Supply customers created over 2,000 new accounts and performed 650+ self-serve support interactions, reducing the volume of escalated support tickets requesting basic information.

“We see Klaviyo Customer Hub becoming what we think of as the future of shopping—a very curated one-to-one experience, unlike traditional ecomm, which is one to many. It’s not just our customer service tool—it’s one-to-one access to Ministry of Supply. That’s really powerful.

AMAN ADVANI,  
CEO, MINISTRY OF SUPPLY

Segment: Style Mavens

Opened email: VIP 15% off

## SUBMITTED REVIEW SEGMENT

Submitted review at least once

Review rating is 5.0

 12,638

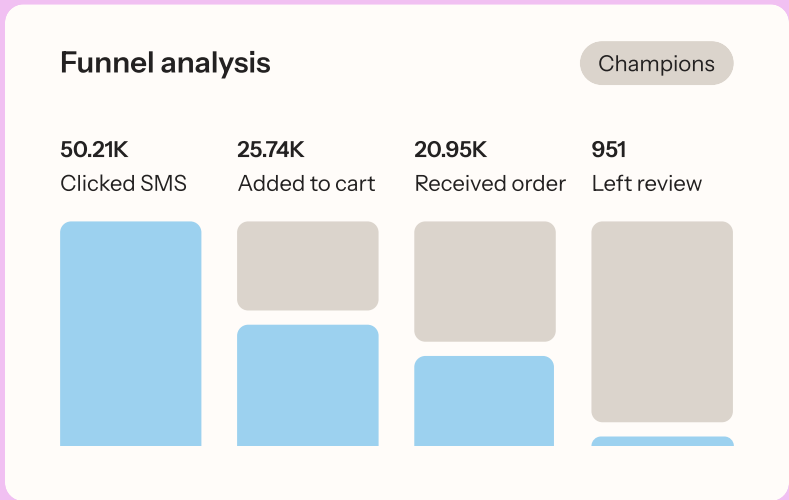
Ministry of Supply°



# Analytics

According to our future of consumer marketing report, 74% of consumers expect brands to deliver personalized experiences in 2025—and many are willing to share personal information such as their email address and purchase history to help brands deliver them.

As customers interact with your brand, your lifecycle marketing should get smarter. Data—from customer feedback, from marketing campaigns, from reviews, from social media, and more—should feed back into your brand’s engine to inform future campaigns and personalized interactions. A consolidated tech stack that provides insights into what works and what doesn’t helps teams ditch the busywork of chasing after useful analytics.



## What’s different about Klaviyo Analytics?

01

### Stay on top of performance

Effortlessly track your impact and keep the pulse on your business with clear, reliable reporting.

02

### Automate more meaningful moments

Build relationships at scale with personalized insights, product recommendations, and predictions.

03

### Understand the full customer experience

Uncover trends and hone your strategy by connecting the dots between every interaction.



# Harney & Sons uses Klaviyo Marketing Analytics to grow revenue from email

Harney & Sons, a family business that sells 300+ tea varieties from around the world, has an ecommerce business, distributors in 50+ countries, and two East Coast tea shops. They used to struggle to generate dynamic insights from their customer data.

When they added Marketing Analytics to their Klaviyo stack, that changed. Today, Harney & Sons is able to run targeted re-engagement efforts and a personalized RFM-triggered sunset flow. The team has seen 13% YoY growth in revenue per email recipient in Q4 2024 and 114x Klaviyo ROI in their first full quarter with 4 Klaviyo products.

“Klaviyo Marketing Analytics has allowed us to grow. It recommends new flows that can close little air leaks in our retention, which has been really helpful. And even with the new flows, we still have really healthy engagement and unsubscribe rates.

EMERIC HARNEY,  
MARKETING DIRECTOR, HARNEY & SONS

Segment: Wellness Gurus

Opened SMS: VIP early access

RFM Group: Loyal

Lemon  
Herbal Tea  
\$24.00





# AI-powered personalization

Deep personalization at scale is impossible to do manually, but luckily you don't have to. Every customer-facing team's work, from marketing automation to analytics to customer service, can be elevated with an AI layer that ingests customer data and feeds it back into existing processes.



## What's different about Klaviyo Analytics?

### HIDDEN INSIGHTS, REVEALED

#### Predictive analytics

Forecast next order date, CLV, churn risk, and more.

#### Product recommendations

Highlight the products each customer might like the most.

#### Benchmarks

Compare performance against your industry and personalized peer group.

#### Review sentiment

Know what customers are loving (or not) by analyzing feedback.

### INTUITIVE GENERATIVE AI TOOLS

#### Flows

Automatically build out the structure for multi-channel flows.

#### Email subject lines

Generate email subject lines worth opening.

#### Segments

Intelligently define new segments within your audience.

#### Email content

Create and revise email marketing content with AI.

#### SMS campaigns

Streamline the process of writing SMS campaign copy.

#### Responses to customer reviews

Reply to reviews even faster and spin up detailed [customer review headlines](#).

### OPTIMIZING EVERY MOVE

#### Reputation repair

Automatically build out the structure for multi-channel flows.

#### Auto monitors

Get alerts if key metrics drop.

#### A/B testing

Find the winning subject line, image, offer, CTA, or other needle-mover.

#### Smart send time

Boost engagement by timing emails perfectly.



# Svenfish builds hyper-personalized marketing with AI-generated segments

Svenfish is a New England-based fresh seafood provider. Because taste is so varied—and because Svenfish often sells small batches of popular seafood cuts—the brand needed sophisticated segmentation to market the right products to the right customers.

So Svenfish started building hyper-targeted daily campaigns with Klaviyo’s Segments AI, which generates a customer segment based on a text prompt. 82% of Svenfish’s YTD revenue from Klaviyo was made using one or more AI features, and 70% of YTD ecommerce revenue can be attributed to Klaviyo.

“We’re making Klaviyo our central CRM. It’s easy to use, it’s modern, and it makes our lives simpler with AI. You don’t want to waste time, especially at a small business like Svenfish, where we’re all wearing multiple hats. Klaviyo makes life easier.

SREEVATS R.,  
PRODUCT MANAGER, SVENFISH

Opened SMS: VIP only free dessert

Segment: Foodies

Forecasted CLV: \$350

Customer activity

⊖

VIP dessert offer

⊞

Placed order

⌚

Checked in for loyalty

✉

Consented to SMS







## THE SOLUTION

# The only CRM built for B2C

## Your complete B2C CRM strategy toolkit

### Meeting (and exceeding) individual customer needs at scale with a B2C CRM

At Klaviyo, we were inspired by the way traditional CRM revolutionized B2B by unifying teams, channels, and data. We're setting out to do the same for B2C, by building an [ecommerce CRM](#) that has the power your brand needs to nurture millions of 1:1 personalized relationships at scale. Our CRM democratizes both experience and personalization for brands of all sizes to deliver across the entire lifecycle without the complexity.



# Getting started with a B2C CRM

01

## Assess your tech stack and data readiness.

Evaluate your specific business needs and goals, and consider what functionality is essential. Transfer existing customer data from legacy systems or spreadsheets into the CRM. Make sure the data is accurate, complete, and correctly mapped to corresponding fields.

03

## Partner with a provider that can support implementation best practices.

Prioritize a platform that comes with dedicated support for the things you can't figure out on your own—or one that has a large, free [community for support](#). Regularly analyze key performance metrics such as engagement, conversion rates, and customer satisfaction. Continuous monitoring will help you identify areas for improvement and optimize your strategy.

02

## Consider your team's training needs.

Data is only as good as its input, and everyone must know how to use the CRM for it to provide value. Think through your team's existing experience and familiarity with such systems. Provide comprehensive training to all users interacting with the CRM, including sales representatives, customer service agents, and marketing teams.

04

## Consider scalability and future use cases.

A B2C CRM should integrate with your existing tech stack so you're improving efficiency rather than impeding operations. Consider ecommerce platforms, email marketing software, and customer support systems. Klaviyo's 350+ integrations, no developers required, power a CRM that is built for marketers, not engineers—so your team can start getting value right away.






# The B2C CRM strategy checklist

Technology & integrations	Data prep	Customer experience	Team and Process	Measurement & optimization
<div>TASKS AND CONSIDERATIONS</div> <div><div><input type="checkbox"/> Assess current tech stack and gaps.</div><div><input type="checkbox"/> Evaluate integration requirements.</div><div><input type="checkbox"/> Define success metrics and KPIs.</div><div><input type="checkbox"/> Plan phased implementation approach.</div><div><input type="checkbox"/> Document training needs.</div></div>	<div>TASKS AND CONSIDERATIONS</div> <div><div><input type="checkbox"/> Audit existing customer data sources.</div><div><input type="checkbox"/> Map customer data points across existing systems.</div><div><input type="checkbox"/> Define unified customer profile requirements.</div><div><input type="checkbox"/> Establish data privacy standards.</div><div><input type="checkbox"/> Plan data migration.</div></div>	<div>TASKS AND CONSIDERATIONS</div> <div><div><input type="checkbox"/> Map current customer journey and touchpoints.</div><div><input type="checkbox"/> Identify areas for personalization.</div><div><input type="checkbox"/> Set up cross-channel messaging strategy.</div><div><input type="checkbox"/> Set response time standards.</div><div><input type="checkbox"/> Plan customer feedback loops.</div></div>	<div>TASKS AND CONSIDERATIONS</div> <div><div><input type="checkbox"/> Document roles and responsibilities.</div><div><input type="checkbox"/> Map out current workflows.</div><div><input type="checkbox"/> Find areas for process improvement or automation.</div><div><input type="checkbox"/> Create a training plan.</div><div><input type="checkbox"/> Establish a change management plan to promote adoption.</div></div>	<div>TASKS AND CONSIDERATIONS</div> <div><div><input type="checkbox"/> Capture baseline metrics.</div><div><input type="checkbox"/> Set performance goals.</div><div><input type="checkbox"/> Identify reporting needs.</div><div><input type="checkbox"/> Document ongoing testing and optimization.</div></div>
<div>RESOURCES</div> <div><div><a href="#">Klaviyo data integrations</a></div></div>	<div>RESOURCES</div> <div><div><a href="#">8 advanced CDP use cases to drive customer loyalty</a></div><div><a href="#">7 benefits of using a CDP</a></div><div><a href="#">How to choose a CDP</a></div></div>	<div>RESOURCES</div> <div><div><a href="#">CRM strategy guide</a></div></div>	<div>RESOURCES</div> <div><div><a href="#">2025 guide to integrated marketing campaigns</a></div></div>	<div>RESOURCES</div> <div><div><a href="#">The strategic guide to B2C marketing reporting</a></div></div>



# Klaviyo is the only CRM built for B2C

Building customer relationships starts with your data—and it shouldn’t be complicated. Klaviyo (NYSE: KVYO) is the only CRM built for B2C brands, designed to deliver true 1:1 personalization at scale. Powered by its built-in data platform and AI insights, Klaviyo combines marketing automation, analytics, and customer service into one unified solution, making it easy for businesses to know their customers and grow faster.




### Data-first, built in

Bring every interaction into actionable customer profiles in real time.




### 1:1 personalization without complexity

Deliver relevant messages at every touchpoint.



### Native marketing, analytics, and service together

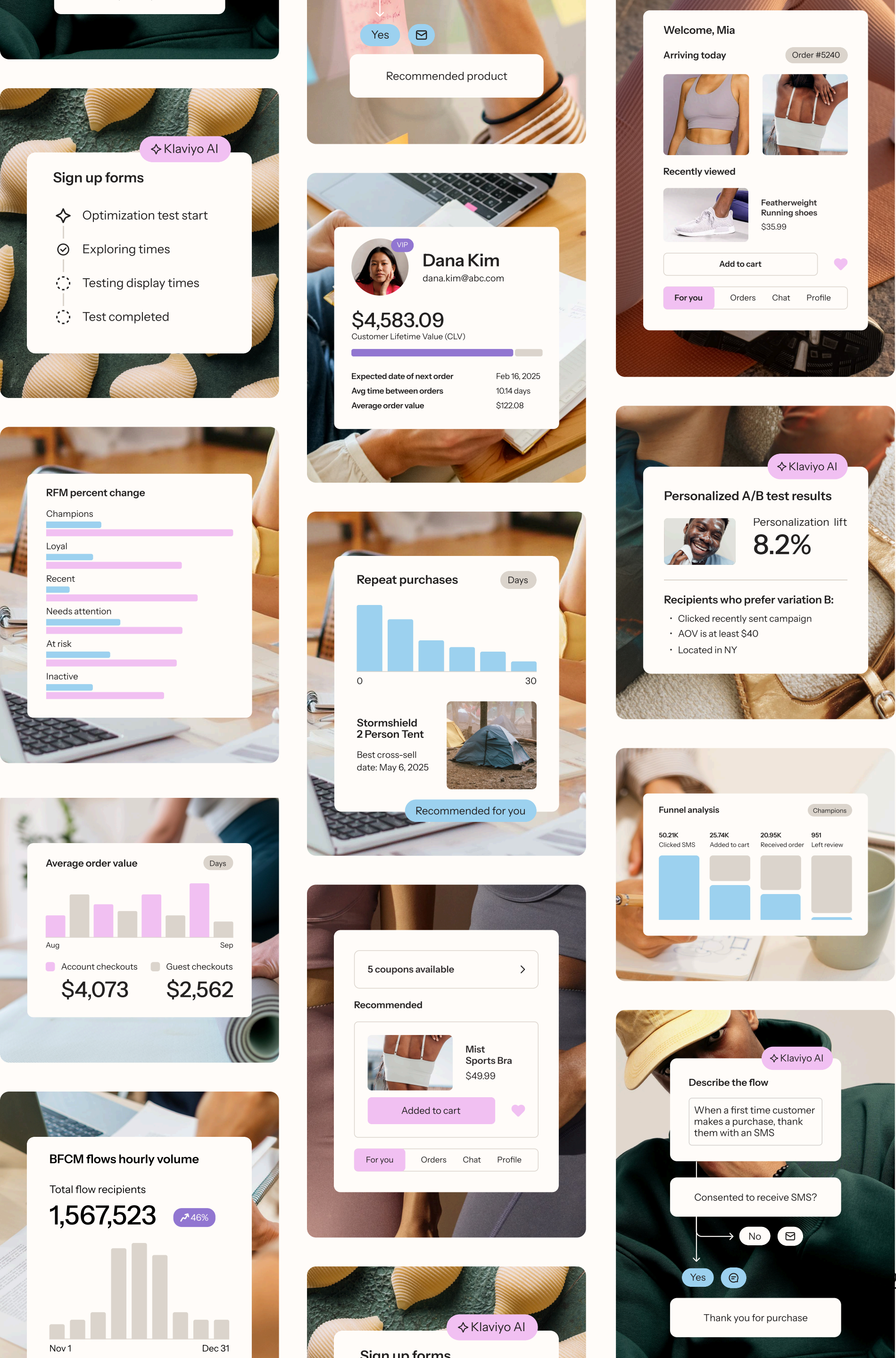
Eliminate the disconnect between teams.



### Operational efficiency and cost savings

Streamline operations, reduce complexity, and cut down on costs.

See it in action





# Power smarter digital relationships with Klaviyo

Klaviyo (CLAY-vee-oh) helps relationship-driven brands like Mattel, Glossier, Core Power Yoga, Daily Harvest and 167,000+ others deliver 1:1 experiences at scale, improve efficiency, and drive revenue.

[Get started](#)

