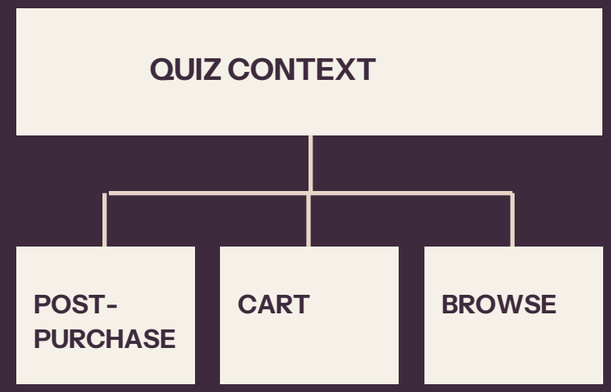
LAURA® GELLER

CUSTOMER CONTEXT ACROSS THE LIFECYCLE

A quiz that shaped the next message.



Use what customers share to shape the next message. Carry that context from browsing to checkout and life after the sale.

+36%

Year-over-year increase in total email and SMS revenue

MY CONTRIBUTION

I built several flow types for three stages of the customer journey. Quiz answers helped tailor each message to customer needs. This study explains how that approach works.

Klaviyo email + Klaviyo SMS

WHAT I IMPLEMENTED

More paths, each with a customer purpose.

I implemented more than eight post-purchase flow types, five abandoned-cart flow types and five browse-abandonment flow types. Quiz-informed personalization helped shape these touchpoints. Both email and SMS used Klaviyo.

+26%

increase in automated revenue

+36%

year-over-year increase in total email and SMS revenue

WHY MULTIPLE FLOW TYPES

Customers needed different help at each stage. The quiz gave us context about them. The stage set the message's purpose. More flow types gave us room to address those differences.

WHAT THE FIGURES MEAN

The 26% result refers to automated revenue; its comparison period was not supplied. The 36% result refers to total email and SMS revenue year over year. Flow-type counts describe categories of automation, not individual message counts.

Client engagement and results: Jake Bauman. Source and method notes: page 10.

STRATEGIC INTERPRETATION

Personalization should answer uncertainty.

Choosing a product, returning to a cart and learning to use a purchase call for different help. A quiz can guide that help. Its answers need to change what happens next.

DECLARED PREFERENCES

Use the context people give.

Klaviyo separates what customers tell a brand from what their actions reveal. Its guidance shows how quiz answers can shape later messages as well as the first recommendation.

Collect data with a purpose. Use each answer to choose a message, explain a product or suggest a useful option. A field that changes nothing creates work without helping the customer.

OBSERVED BEHAVIOR

Let the moment set the job.

A quiz tells you what people say they want. Browsing, cart activity and purchases show what they do next. Use both. One old answer should not control every later message.

Start with what the customer is doing now. Then use relevant profile data to shape the response. The aim is to answer a current question, not just mention a past answer.

Research context: L1. Original strategic interpretation.

CONFIRMED SCALE, CONCEPTUAL INTERNAL LOGIC

One context layer. Three lifecycle jobs.

I built three flow families. The counts below come from the client work. The descriptions explain each family's purpose. They do not list the old flow names or exact rules.

QUIZ + CUSTOMER CONTEXT

MORE THAN 8 TYPES

Post-purchase

Help customers get value from what they bought. Relevant education, reassurance and an appropriate next purchase can serve different needs. The message should recognize the customer's transition from choosing to owning.

5 TYPES

Abandoned cart

Support an unfinished decision. Product-specific context can reinforce fit or answer a likely question. Preserve the shopper's immediate intent instead of replacing it with a broad, unrelated recommendation.

5 TYPES

Browse abandonment

Turn early interest into a clearer choice. Use viewed products as context, with quiz information adding relevance where available. Keep the response proportionate to the strength of the browsing signal.

Klaviyo supports paths based on profile and behavioral conditions. Each family can have a distinct job within the same personalization strategy.

Client counts: Jake Bauman. Platform context: L2.

AN IMPLEMENTATION FRAMEWORK

Help customers get more from the purchase.

After the sale, help customers use what they bought. The next message can build confidence and explain which other products, if any, would help.

EDUCATION AND CONFIDENCE

Begin with the purchased product.

For a new design, start with the item bought and the customer's stated needs. Use these to choose useful guidance. Different buyers may need different explanations.

An illustrative message might explain application or product use when that information is relevant. It should remain consistent with the brand's approved guidance and avoid guessing concerns that the customer never expressed.

THE NEXT RECOMMENDATION

Earn the next commercial step.

A complementary recommendation should have a clear relationship to the purchase or stated need. Explain that relationship so the customer can judge its usefulness. A personalized product grid alone does not supply the reasoning.

For a new program, separate product help from the next offer. Define when each belongs. Keep a flow type when it serves a clear need and improves the experience.

Illustrative framework. Quiz context: L1; branching context: L2.

AN IMPLEMENTATION FRAMEWORK

Keep the unfinished decision in view.

A cart contains a concrete selection. The most useful follow-up can preserve that selection, use relevant quiz context to explain it and respond to what the customer does next. Five cart-flow types were implemented in this engagement.

MESSAGE RELEVANCE

Explain the fit, not the data.

Translate the available context into helpful product language. The customer needs to understand why the choice may suit them, not see a list of profile fields or a description of the automation machinery.

Keep the primary action connected to the cart. If an alternative is appropriate, explain the reason rather than silently replacing the shopper’s selection with something unrelated.

BRANCHING AND TIMING

Evaluate the right state.

Klaviyo needs the data before a split can check it. That matters when a new answer or action decides the path. Timing changes which data the split can use.

For a new implementation, test profiles with complete, missing and recently changed quiz data. Review how a subsequent purchase or changed cart should affect the next message. A branch is only useful when the data and timing make its decision dependable.

Research context: L2. Tactical choices are prospective framework, not a recovered configuration.

AN IMPLEMENTATION FRAMEWORK

Treat interest as a question, not a promise.

Browsing is a chance to help someone choose. It does not mean they have decided to buy. I built five browse-abandonment flow types to address different customer needs.

THE CONTENT DECISION

Reduce the work of choosing.

For example, a follow-up could explain a viewed product or suggest a relevant option. Quiz answers can guide what to stress. Check that the message still fits the customer's recent actions.

Avoid assuming that every product view represents lasting preference. The job is to make the next step easier, while leaving room for the customer to explore or change direction.

THE PROGRESSION RULE

Let stronger intent take priority.

A prospective design should define what happens when a browser adds to cart or buys. The next experience should reflect that progression rather than continuing an earlier conversation unchanged.

Klaviyo can branch on customer actions and profile data. Define how customers move between flow families. Review the full journey for repeated messages or competing requests.

Research context: L2. Illustrative strategy and transition rules.

ILLUSTRATIVE DECISION FRAMEWORK

Give every path a reason to exist.

A flow family describes the moment; quiz context helps shape the response. This illustrative decision table shows how a team can specify message purpose, fallback behavior and the next action to test.

EVENT + QUIZ CONTEXT	MESSAGE JOB	FALLBACK OR EXIT DECISION
Purchase + relevant preference	Explain the purchased product in a way that helps the customer use it. Connect any next recommendation to an identifiable need.	When quiz data is absent, use approved product-level guidance. Reassess the next message when the customer's purchase state changes.
Cart activity + known preference	Preserve the selected product and explain relevant fit. Keep the main action connected to the unfinished decision.	When data conflicts, avoid unsupported personalization. Define how a completed order or changed cart updates eligibility for the next message.
Browsing + limited context	Help the customer evaluate a viewed product or a credible adjacent option. Keep the message proportionate to the evidence.	Use a useful general explanation when preference data is missing. Define how stronger intent moves the customer into the appropriate next experience.

Maintain representative test profiles for complete, missing and changed answers. Review channel eligibility separately, then inspect the combined email and SMS experience.

Original operating framework. Public context: L1, L2, L4.

A PROPOSED EVALUATION FRAMEWORK

Measure the value of relevance.

The case reports growth in automated revenue and total email and SMS revenue. A future test could ask how much came from personalization. Keep tracked revenue separate from the effect measured by a controlled test.

READ THE BUSINESS RESULTS

Avoid rewarding flow count.

Flow count alone does not measure success. Ask which customer problem each type solves. Simplify complex branches that add little value.

Track each flow family and the channel as a whole. A gain in one area may come with a decline elsewhere. Check the total before claiming an overall improvement.

TEST THE INCREMENTAL EFFECT

Hold the comparison steady.

A new test could compare quiz-based content with a suitable alternative. Define who takes part, how long the test runs and what you will measure before it starts.

Klaviyo’s holdout guidance separates attributed revenue from the effect measured against a control group. No holdout was reported here. The growth figures are reported outcomes, not proof of lift from a controlled test.

Research context: L5. Measurement design is prospective.

EVIDENCE, INTERPRETATION AND LIMITS

Confirmed work, explained through research.

The study combines Jake Bauman's account of the engagement with public brand context and official Klaviyo guidance. Firecrawl research was conducted on October 6, 2026. Framework pages explain transferable strategy without inventing historic flow settings.

L1 Klaviyo · Collecting customer-first data

L2 Klaviyo · Understanding flow branching

L3 Laura Geller · Foundation and shade finder

L4 Klaviyo · SMS segmentation

L5 Klaviyo · Global holdout groups

Brand identity · Laura Geller

WHAT IS ESTABLISHED

Jake implemented the supplied numbers of post-purchase, cart and browse flow types, with quiz-informed personalization. Both email and SMS used Klaviyo. Reported growth was 26% in automated revenue and 36% in total email and SMS revenue year over year.

WHAT REMAINS UNSPECIFIED

The historic quiz questions, branch inventory, dates, message counts, attribution settings and comparison period for the 26% result were not supplied. Current platform features explain possibilities; they do not establish past configuration or account eligibility. Public sources do not independently verify the results.