

Klaviyo email and SMS checklist

For Shopify and e-commerce brands that run email or SMS in Klaviyo and want to know what's missing. Open your Klaviyo and Shopify accounts side by side and work through it one section at a time.

Time needed: **60 to 90 minutes**Updated: **October 2026**

01 Core flows

- ☐ **Run a welcome series for every new email subscriber**
It reaches people when their interest is highest. Check that the promised discount or perk arrives in the first email.
- ☐ **Set up an abandoned checkout flow triggered by Started Checkout**
These shoppers were one step from paying. Add a flow filter so anyone who places an order exits the flow.
- ☐ **Add a browse abandonment flow for people who viewed a product**
It catches interest before the cart. Filter out people who already started checkout so they don't get both emails.
- ☐ **Build a post-purchase flow with delivery info, a review request and a next product**
Split first-time buyers from repeat buyers: a first order needs reassurance, a fifth order doesn't.
- ☐ **Create a win-back flow for customers who stopped ordering**
Set the delay from how often your products are usually reordered, not from a template default.
- ☐ **Turn on back in stock alerts for sold-out products**
Publish a back in stock form in Klaviyo's sign-up forms, build the flow, and turn off "Continue selling when out of stock" in Shopify.
- ☐ **Go through each flow as a test subscriber and click every link**
Expired discount codes, broken links and missing images in flows can run for months without anyone noticing.

02 Sign-up forms

- ☐ **Show your pop-up after a delay or on exit intent, not on page load**
Visitors close forms that appear before they've seen a product. Build a separate version for mobile.
- ☐ **Hide your forms from people who are already subscribed**
Use the form's targeting settings to exclude existing profiles, so subscribers stop seeing the same offer.
- ☐ **Add an embedded sign-up form in your site footer**
It gives visitors who closed the pop-up a permanent place to join your list.
- ☐ **Turn on the email marketing checkbox at Shopify checkout, unchecked by default**
In Shopify's checkout settings, under Marketing options, leave Preselected off. A pre-checked box isn't express consent under CASL.

- ☐ **Place a test order and confirm the profile shows as subscribed in Klaviyo**
If Shopify subscribers don't sync to your Klaviyo list, buyers who said yes never get your emails.

- ☐ **Ask for a phone number on a second step, with its own SMS consent**
Klaviyo recommends a multi-step form when you collect both. SMS needs its own consent wording, separate from email.

03 Segments and campaigns

- ☐ **Build an engaged segment from recent clicks, site visits and orders**
Apple Mail Privacy Protection inflates opens, so clicks and orders are a better sign of real interest.
- ☐ **Separate customers from subscribers who have never bought**
Non-buyers need reasons to trust you. Customers need new products, refills or a reason to come back.
- ☐ **Create a repeat buyer segment for early access and VIP offers**
Your best customers should hear about launches first, not at the same time as everyone else.
- ☐ **Plan a monthly campaign calendar with launches, promotions and seasonal dates**
Planning ahead avoids rushed sends before Black Friday and leaves time to write the French versions.
- ☐ **Send most campaigns to engaged segments, not your whole list**
Mailing inactive profiles every week pulls down inbox placement for everyone else on the list.

04 Deliverability and list hygiene

- ☐ **Set up a branded sending domain in Klaviyo, like send.yourstore.com**
Your emails then build your own domain's reputation instead of sending through Klaviyo's shared domain.
- ☐ **Check that SPF and DKIM pass on a test email**
Send a campaign preview to a Gmail address, choose "Show original" and look for PASS next to SPF and DKIM.
- ☐ **Publish a DMARC record for your domain, starting at p=none**
Gmail, Yahoo and Microsoft require DMARC for bulk senders. Add a reporting address so you can see who sends as you.
- ☐ **Send from an address on your own domain, never Gmail or Hotmail**
Gmail and Yahoo expect your From address to match your authenticated domain. Free addresses fail that check.
- ☐ **Register your domain in Google Postmaster Tools and check it monthly**
It shows your spam complaint rate at Gmail and whether you meet Google's bulk sender requirements.
- ☐ **Send a last-chance email to long-inactive profiles, then suppress them**
Profiles with no clicks, visits or orders for months hurt inbox placement. Suppressed profiles also don't count toward your Klaviyo bill.

05 Consent, CASL and French sends

- ☐ **Never import bought lists or contacts who didn't agree to marketing**
It breaks CASL and fills your list with spam traps and complaints.
- ☐ **Keep the source and date of consent for every imported contact**
Under CASL, the sender has to prove consent. Klaviyo records form sign-ups, but imports need that data too.

- ☐ **Track implied consent from purchases and ask for express consent before it expires**
Under CASL, implied consent from a purchase lasts two years from that purchase, and six months from an inquiry.
- ☐ **Put your business name, mailing address and contact info in every footer**
CASL requires it in every commercial email and SMS, plus an unsubscribe processed within 10 business days. In SMS, a link to this info works.
- ☐ **Link your privacy policy on every sign-up form**
Quebec's Law 25 expects you to explain what you collect and why at the moment you collect it.
- ☐ **Capture each subscriber's language and save it on their profile**
Add a language choice or a hidden field to your forms so you can build English and French segments.
- ☐ **Send French versions of your campaigns and flows to French-speaking subscribers**
Quebec's Charter of the French language requires commercial publications to be available in French. Write it natively, don't machine-translate it.

06 Measuring email's share of sales

- ☐ **Compare Klaviyo-attributed revenue to total Shopify sales for the same period**
That gives you email's share of revenue. Track it monthly, split between flows and campaigns.
- ☐ **Check your Klaviyo attribution settings: the window and whether opens count**
Generous settings credit email for sales it didn't drive. Know the rules before you compare numbers.
- ☐ **Report revenue per recipient instead of open rates**
Opens are inflated by Apple Mail Privacy Protection. Revenue per recipient shows which emails actually sell.
- ☐ **Turn on UTM tracking in Klaviyo so email sales show up in GA4**
Keep the same source and medium on every send so GA4 groups your email traffic in one place.
- ☐ **A/B test one element at a time in your biggest flows**
Test the subject line, offer or timing separately, so you know what made the difference.

Want a second pair of eyes? We look at your flows, sign-up forms and deliverability in a free retention audit and tell you what we'd fix first. You don't have to hire us afterwards.

Ask for the free audit: nexasolutions.ca/contact

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