The BFCM Margin & Retention Playbook

Nov 3, 2026 · Continuo · @Jus

Start here

This playbook helps a Shopify and Klaviyo wellness brand set up Black Friday so that less discount goes to loyal customers, fewer emails land in spam, and more new buyers come back for a second order. An experienced marketer can build it in one to two days; a founder doing it alone should plan for a weekend.

Black Friday 2026 is Friday, November 27. To use everything here, finish the build by Sunday, November 22.

What each section fixes

Section	Problem it fixes
01 Replenishment delay logic	Reorder reminders fire months early after stock-up orders
02 Deliverability safeguards	Heavy sending during sale week pushes mail into spam
03 Tiered offer matrix	The discount goes to people who would have paid full price
04 Holiday welcome and gift splits	BFCM buyers rarely return, and gift buyers get the wrong emails
05 Sale campaign copy	Ready-to-edit emails for early access, Black Friday, Cyber Monday and the last day
06 Sale-week flow rules	Welcome, cart and winback flows stack extra codes on top of the sale
07 Holdout framework and margin calculator	No way to tell what actually worked

What you need

- A Shopify store connected to Klaviyo, with the integration syncing orders, products and customer tags.

- Klaviyo's Shopify coupon sync turned on, so Klaviyo can send unique discount codes.
- Shopify Flow, which comes with most Shopify plans. Section 04 also uses Flow's "Run code" step. Check that your plan includes it; if it doesn't, use the gift checkbox method on its own.
- A sending domain you own (for example mail.yourbrand.com) set up in Klaviyo.
- Access to Google Postmaster Tools for your sending domain.
- A subscription app (Recharge, Skio or Loop) is optional. Nothing in this playbook needs one; section 06 explains how to treat subscribers during the sale if you have them.

Order of work

1. Day 1 morning: run the authentication checklist in section 02 and fix anything that fails. DNS changes can take up to 48 hours to take effect, so do this first.
2. Day 1 afternoon: build the segments in sections 02 and 03, and set up the three code pools in section 03.
3. Day 2 morning: set up the Shopify Flow gift tag and build the welcome flow and gift track in section 04.
4. Day 2 afternoon: add the quantity branches in section 01, apply the flow rules in section 06, and set up the holdouts in section 07.
5. Before November 22: schedule the campaigns in section 05 using the calendar in section 02, place test orders through every branch, and send seed tests.

Words used in this playbook

- **Engaged** means someone clicked an email, visited the site or placed an order. An email open only counts when Klaviyo marks it as not an Apple privacy open, because Apple Mail records opens automatically.
- **Loyal customer** means two or more orders, with the latest in the last 180 days.
- **Lapsed customer** means they've ordered before, but not in the last 180 days.
- Text in [brackets] is something you fill in with your own brand's details.

If you'd rather we build it

Continuo can plan, build and run all of this in your own Klaviyo and Shopify accounts, including sale-week management and the holdout readouts. We take 5 brands for BFCM 2026, and sign-ups close on Tuesday, November 10, so every build is finished by November 22. To talk it through, book a 30-minute call: cal.com/continuo/bfcm-build-call.

01 Replenishment delay logic

Time each reorder reminder to when the customer will actually run out: the number of units they bought, times the days one unit lasts, minus a 7-day buffer. A reminder that arrives early teaches people to ignore it or to wait for another discount.

Why the standard flow breaks during a sale

Most replenishment flows send one reminder about 30 days after an order, which suits someone who bought one 30-day bottle. Black Friday buyers of consumables often buy two, three or six units. A customer who bought three bottles gets the reminder on day 30 with about 60 days of product left. This is our own observation from client accounts, not a published figure.

The reminder also shouldn't land on day 30 for a one-bottle buyer. That's the day they run out, so a reminder then is already late. The buffer gives them a week to reorder before they run out.

The delay matrix (example: a product that lasts 30 days)

Units in the order	Product lasts	First reminder	Second reminder
1	30 days	Day 23	Day 30
2	60 days	Day 53	Day 60
3 or more	90 days	Day 83	Day 90

For other products, use: first reminder = units × days one unit lasts − 7. Cap the branches at 3 units, so someone who bought six still hears from you within three months. A 90-day silence is already long, and at that point an email asking how they're getting on keeps the relationship alive.

Build it in Klaviyo

Klaviyo can't calculate a wait from a number in the order, so each quantity needs its own branch with a fixed delay. Build one flow per supply length (for example one for 30-day products and one for 60-day products).

1. Create a flow triggered by the metric **Ordered Product**. Klaviyo records one Ordered Product event per line item, and each one carries the item's Quantity.

2. Add a trigger filter so the flow only starts for products of this supply length: Product Name is one of [your 30-day products], or Categories contains [your 30-day collection].
3. Add flow filters, which are checked again before every email:
    - Placed Order zero times since starting this flow (they've already reordered, so the reminder isn't needed).
    - Shopify Tags doesn't contain "wholesale".
4. Add a 15-minute time delay, then a conditional split: Shopify Tags contains "gift-bfcm26". On the "yes" path, end the flow, because a gift buyer isn't using the product (section 04 explains the tag). The delay gives Shopify time to sync the tag.
5. On the "no" path, add a **trigger split**: Quantity equals 1. Its "yes" path is the 1-unit branch.
6. On the "no" path of that split, add a second trigger split: Quantity equals 2. Its "yes" path is the 2-unit branch, and its "no" path is the 3-or-more branch.
7. In each branch, add a time delay from the matrix (23, 53 or 83 days), the first reminder, a 7-day delay, then the second reminder.
8. Use the same two emails in every branch. Only the delays differ.

If one order has two different products, Klaviyo starts the flow once for each product, so each one is reminded on its own timing. If you'd rather send one reminder per order, use the Placed Order metric and split on Item Count instead, accepting that mixed orders get one timing.

During the sale

Turn off sends for reminders that fall between November 24 and December 1. The sale emails already reach these customers, and a full-price reminder on the same day as a 25% email looks careless. In Klaviyo, set the flow's emails to Manual for those dates, then send or cancel the held emails on December 2. Don't use a flow filter for this, because a filter removes people from the flow for good.

The two reminder emails

Reminder 1

- Subject: Running low on [Product]?
- Preview: Your [Product] should last until about [date]. Here's an easy way to reorder.

- Body: Hi {{ person.first_name|default:'there' }}, your last order of [Product] should be running out in about a week. If you'd like to reorder, your usual size is one click away. If you'd rather not think about it again, you can subscribe and we'll send it on a schedule that suits you. [Button: Reorder [Product]]

Reminder 2

- Subject: A reminder about your [Product]
- Preview: In case you'd like to reorder before you run out.
- Body: Hi {{ person.first_name|default:'there' }}, just a short reminder in case you'd like to reorder [Product] before you run out. If it isn't working for you, reply and tell us. We read every reply. [Button: Reorder]

Neither email includes a discount. These customers are reordering a product they already use, so a discount here mostly costs margin.

02 Deliverability safeguards

Keep your daily Gmail spam rate under 0.1% during the sale. You do that by emailing recently engaged people more and everyone else less, and by making sure your authentication passes before the first big send.

The rules that apply now

Mailbox provider	What it requires	Since
Gmail	SPF, DKIM, DMARC, one-click unsubscribe, and spam complaints under 0.3%, ideally under 0.1%. Stricter enforcement now includes rejecting mail that doesn't comply.	Enforcement tightened November 2025
Yahoo	The same authentication and one-click unsubscribe, with spam complaints under 0.3%.	February 2024
Microsoft Outlook	SPF, DKIM, DMARC and alignment for senders of more than 5,000 emails a day. Non-compliant bulk mail is rejected.	May 5, 2025

0.3% is the point where problems start, not a target. Aim for under 0.1% on every day of the sale.

Gmail also has a Manage subscriptions page that lists the senders who email someone most often, each with a one-tap unsubscribe. A brand that triples its sends in sale week moves up that list.

Authentication checklist (finish by Friday, November 13)

- [ ] SPF passes for the services that send as your domain.
- [ ] DKIM signs with your own domain, not only Klaviyo's, and is aligned with your From address.
- [ ] A DMARC record exists, with at least p=none and a rua address so you receive reports.
- [ ] A branded sending domain is set up and verified in Klaviyo.
- [ ] One-click unsubscribe headers are on. Klaviyo adds these automatically; send yourself a test and check that Gmail shows an Unsubscribe link next to the sender name.
- [ ] Google Postmaster Tools is set up for your domain, and the Compliance Status page shows no failures.
- [ ] You've noted your current spam rate on the Spam Rate page, so you have a baseline.

Don't change your DMARC policy to quarantine or reject in the weeks before the sale. If one of your sending services isn't aligned, a stricter policy will block its mail at the worst possible time.

Segments to build in Klaviyo

Build these with "What someone has done (or not done)". Each engagement condition is joined with OR.

Engaged 30 days

- Clicked Email at least once in the last 30 days, OR
- Opened Email at least once in the last 30 days, where Apple Privacy Open is false, OR
- Active on Site at least once in the last 30 days, OR
- Placed Order at least once in the last 30 days.

Engaged 90 days and *Engaged 180 days*: the same four conditions over 90 or 180 days.

Engaged 31 to 90 days: in Engaged 90 days AND not in Engaged 30 days.

Engaged 91 to 180 days: in Engaged 180 days AND not in Engaged 90 days.

Hard exclusions (exclude from every sale email):

- Not in Engaged 180 days (no engagement in six months).
- Placed Order at least once since November 24, 2026 (they've already bought in this sale).
- Shopify Tags contains "wholesale".
- Anyone with an open support ticket, using your helpdesk's Klaviyo integration: [your helpdesk's property or event].
- Anyone who has marked an email as spam or bounced. Klaviyo suppresses these automatically; check that you haven't re-imported them.

Send calendar, November 17 to December 1

Who	Nov 17 gift guide	Nov 22 early access notice	Nov 24 early access opens	Nov 27 Black Friday	Nov 29 bundles	Nov 30 Cyber Monday	Dec 1 last day	Total
Loyal and one-time customers, engaged in 90 days	Send	Send	Send	Send (gift reminder)	—	Send	—	5
Everyone else engaged in 30 days	Send	—	—	Send	Send	Send	Clicked in the sale but didn't buy	5
Engaged 31 to 90 days	Send	—	—	Send	—	Send	—	3
Engaged 91 to 180 days	—	—	—	Only if spam rate is under 0.1%	—	—	—	0 to 1
No engagement in 180 days	—	—	—	—	—	—	—	0

Who	Nov 17 gift guide	Nov 22 early access notice	Nov 24 early access opens	Nov 27 Black Friday	Nov 29 bundles	Nov 30 Cyber Monday	Dec 1 last day	Total
Ordered since Nov 24	Removed from the remaining sale emails; they get the welcome or post-purchase flow instead							Flow only

Nobody gets more than five sale emails, and nobody gets more than one marketing email a day, flows included. Order and shipping emails don't count.

SMS: two texts at most, on Black Friday and Cyber Monday, only to SMS subscribers who haven't ordered since November 24.

Daily suppression rules

Build each day's send from the calendar, then remove:

- Everyone who ordered since November 24.
- Everyone who received a marketing email in the last 20 hours. Klaviyo's Smart Sending does this for you if you set its window; check the setting before each send.
- Everyone who unsubscribed or marked spam from an earlier sale email. Klaviyo handles this automatically.
- On Sunday, November 29 and Tuesday, December 1: everyone who hasn't clicked a sale email. These are the lighter days, so only the most interested people hear from you.

Send each campaign in the recipient's local time, with Smart Sending on. Order confirmations and shipping emails skip Smart Sending, since people expect them.

Stop rule

Check the Spam Rate page in Google Postmaster Tools every morning from November 17. Postmaster data is usually a day or two behind, so also watch Klaviyo's spam complaint rate on each campaign.

- Over 0.1% on any day: send the next email only to Engaged 30 days.

- Over 0.3% on any day: pause the remaining sale emails, find which send caused it, and only restart with Engaged 30 days.

03 Tiered offer matrix

Give your sharpest discount only to new and lapsed customers, and reward loyal customers with early access and a gift instead. In Klaviyo's data, 47% of BFCM purchases came from repeat purchasers, so a single code for everyone puts about half the discount on people who were likely to reorder anyway.

Check this first: the offer must be a code, not a site-wide price

Tiering only saves margin if the main discount is delivered as unique codes. If your whole site shows 25% off, loyal customers see it on the homepage and use it, and most of the saving disappears. In that case, still give loyal customers early access and the gift on top. The benefit becomes loyalty and retention rather than margin.

Unique codes also stop your main offer from spreading on coupon sites.

The matrix

Customer type	Klaviyo definition	Offer	When they get it
Loyal customers	Placed Order at least 2 times over all time AND at least once in the last 180 days	Early access, a gift with purchase, and 10% off	From Tuesday, Nov 24
One-time customers	Placed Order equals 1 over all time AND at least once in the last 180 days	Early access and 15% off, or a starter bundle at the same saving	From Tuesday, Nov 24
Lapsed customers	Placed Order at least once over all time AND zero times in the last 180 days	The main offer: [25]% off	From Friday, Nov 27
New subscribers and prospects	Placed Order zero times over all time AND in Engaged 90 days	The main offer: [25]% off	From Friday, Nov 27

Customer type	Klaviyo definition	Offer	When they get it
Ad traffic (not on your list)	Not in Klaviyo	The main offer through a landing-page code	From Friday, Nov 27

The percentages are a starting point. Health and beauty averaged a 35% order-level discount in Cyber Week 2024 (Salesforce, via Eightx), and there's no clean public benchmark for supplements. Klaviyo also reported that in 2025 the brands offering the smallest discounts grew 14%. Pick a main offer you can afford, and keep the gap between tiers.

Set up the codes

Create three discounts in Shopify and sync each one to Klaviyo as a coupon:

1. **BFCM26_LOYAL**: 10% off, one use per code, starts Nov 24, ends Dec 1 at 11:59 p.m. The gift is a separate Shopify automatic discount ("Buy X get Y" or a free product above a set order value), limited to orders that use a BFCM26_LOYAL code. If your Shopify setup can't combine the two, include the gift in a bundle instead.
2. **BFCM26_ONETIME**: 15% off, same settings.
3. **BFCM26_MAIN**: [25]% off, starts Nov 27, ends Dec 1.

In each email, insert the code with Klaviyo's coupon tag, for example `{% coupon_code 'BFCM26_MAIN' %}`. Every recipient then gets their own code.

Set each discount's combination settings so a sale code can't be added on top of a welcome or cart code.

Rewarding loyal customers without a bigger discount

Pick one or two of these. All of them cost less than a deep discount.

- **Early access.** Loyal and one-time customers can shop from Tuesday, November 24, three days before everyone else. This is most valuable when stock is limited, but only say stock is limited if it really is.
- **A gift with purchase.** Choose a product with a high margin and a low cost to you, such as a travel size or a sample of a new product. The worked example below assumes it costs $6.
- **A loyalty bundle.** Two or three of their usual products together at a price that's still below buying them separately.
- **First access to a new product or limited batch,** if you have one launching.

Don't use a "mystery gift" unless you tell people what range of products it could be. Customers who feel misled ask for refunds.

Worked example (a $100k/month store)

Assume 1,000 BFCM orders at an $80 average order, with 47% (470 orders) from existing customers.

Who	Orders	Discount per order	One code for everyone ($20 each)	By customer type
Loyal customers	190	$8 off + $6 gift = $14	$3,800	$2,660
One-time customers	140	$12	$2,800	$1,680
Lapsed customers	140	$20	$2,800	$2,800
Total, existing customers	**470**		**$9,400**	**$7,140**

That's $2,260 less discount on the same number of orders. It only holds if loyal and one-time customers order about as much with the smaller offer.

With a 60% gross margin, a loyal order keeps $34 after its offer and a one-time order keeps $36, against $28 with a 25% code. The tiered approach stays ahead unless orders from those two groups fall by more than about 20%. The calculator in section 07 lets you run this with your own numbers.

04 Holiday welcome and gift splits

Give people whose first order comes during the sale their own 60-day welcome, and send gift buyers a shorter track with no product tips. Six months after Black Friday, only 16% of new customers had bought again, against 33% of existing customers (Optimove, BFCM 2021 data).

Step 1: flag gift orders in Shopify Flow

Klaviyo can't compare two fields with each other, such as the shipping name and the billing name, and Shopify's shipping address isn't reliably on Klaviyo's order events. So Shopify Flow does the check and adds a tag, and Klaviyo reads the tag.

Use two signals:

1. **A gift checkbox on the cart page.** Add a "This order is a gift" checkbox to your cart, saved as a cart attribute named `gift` with the value `yes`. Most themes let you add this in the cart template; your theme's documentation or developer can help. This is the more reliable signal, because the customer tells you directly.
2. **A different shipping name.** In Shopify Flow, use a "Run code" step to compare the shipping address name with the billing address name. Check that your Shopify plan includes Run code. If it doesn't, use the checkbox on its own.

The Shopify Flow workflow:

1. Trigger: **Order created**.
2. Run code: return `isGift = true` if the order's cart attribute `gift` is `yes`, or if the shipping name and billing name are both present and different. Ignore differences in capital letters and spaces.
3. Condition: isGift is true.
4. Actions: add the order tag `gift-bfcm26` and the customer tag `gift-bfcm26`.
5. Wait 60 days, then remove the customer tag. Otherwise someone who bought one gift would be treated as a gift buyer when they later order for themselves.

Klaviyo reads customer tags as the profile property **Shopify Tags**.

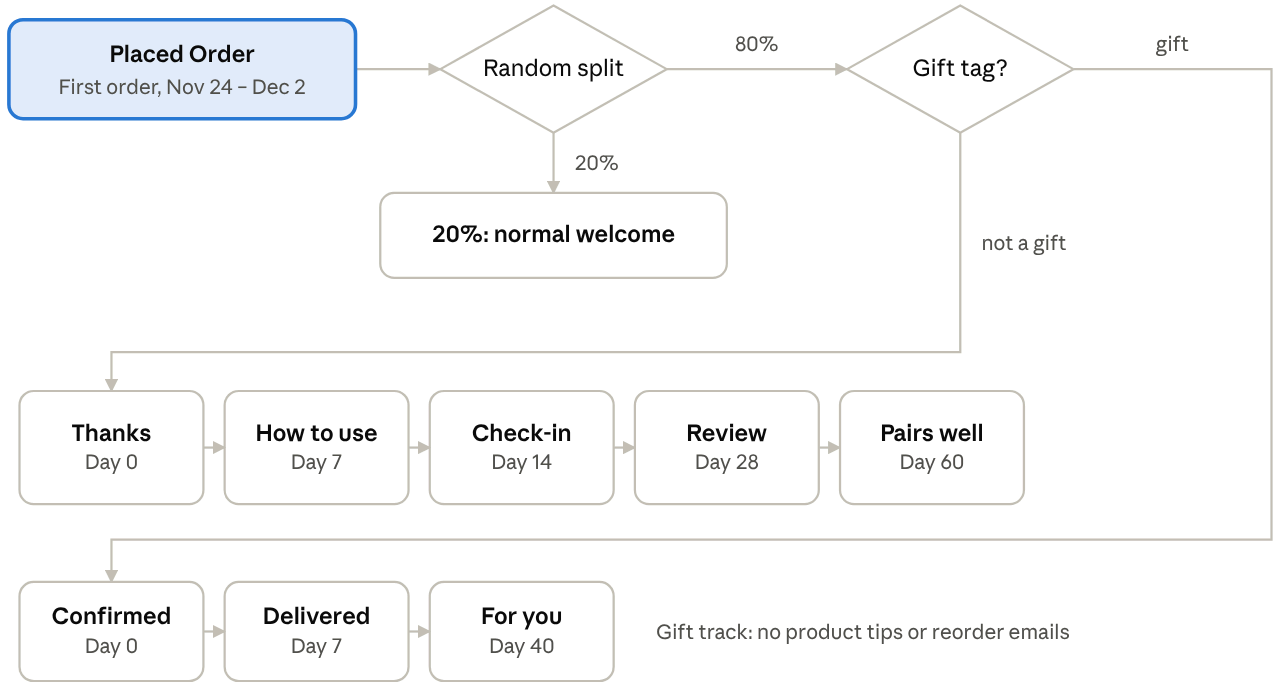
A different shipping name isn't always a gift. Someone may ship to a partner or to work. That's why the gift track is gentle: it never says "your gift" in a subject line, and the first email lets them say if the order was for themselves.

Step 2: build the BFCM welcome flow

1. Trigger: **Placed Order**.
2. Trigger filter: Placed Order equals 1 over all time (their first order). Set the flow to run from November 24 to December 2: turn it on before the sale and stop new entries on December 3.
3. Flow filters, checked before every email:
   - Placed Order equals 1 over all time. When they place a second order, they leave this flow and go into your normal repeat-customer flows.
   - No refund since starting this flow (Refunded Order zero times since starting this flow).
   - Shopify Tags doesn't contain "wholesale".
4. Add a 15-minute delay so the gift tag can sync.

5. Random sample split, 80/20 (see section 07). On each path, add an Update Profile Property step: `bfcm26_group` = `test` on the 80% path, `holdout` on the 20% path. The 20% path ends here and gets your normal welcome flow. In your normal welcome or post-purchase flow, add the filter: bfcm26_group is not "test".
6. On the 80% path, add a conditional split: Shopify Tags contains "gift-bfcm26". "Yes" goes to the gift track, "no" goes to the self-buyer track.
7. Self-buyer track: A1 straight away, A2 on day 7, A3 on day 14, A4 on day 28, A6 on day 60. There's no reorder email in this track. Every order also starts the replenishment flow in section 01, which asks at the right time for how much was bought; a reorder email here would ask a one-bottle buyer three times.
8. Gift track: G1 straight away, G2 on day 7, G3 on day 40.

Gift orders and the holdout split off before the welcome emails



A second order, a refund or a wholesale tag ends the flow at any point.

BFCM welcome flow · holdout, gift split and two tracks

Every new BFCM buyer passes the holdout split first, then the gift check. Reorder emails come from the replenishment flow in section 01, not from this flow.

If your usual delivery time is longer than a week in December, move A2 and G2 later to match it.

Self-buyer track: the five emails

A1 · Straight away · builds trust

- Subject: Thanks for your first order
- Preview: Here's what happens next, and when to expect it.
- Body: Hi {{ person.first_name|default:'there' }}, thank you for ordering from [Brand]. Your order is being packed now. Holiday shipping is busier than usual, so please allow [X] business days for delivery. We'll email you when it ships. If anything about your order needs changing, reply to this email and someone on our team will help.
- Button: View your order

A2 · Day 7 · builds trust

- Subject: How to get the best results from [Product]
- Preview: A few simple steps for your first weeks.
- Body: Hi {{ person.first_name|default:'there' }}, your order should have arrived by now. Here's how to use [Product] so you get the most from it: [when to take or use it], [how much], and [what to expect in the first two weeks]. Most people notice [honest, checked result] after [time]. If you have questions, reply and we'll help.
- Button: Read the full guide
- Note: any health or results claim needs to match what your product can legally claim.

A3 · Day 14 · builds trust (plain text, from the founder)

- Subject: How is it going?
- Preview: A quick question from [Founder name].
- Body: Hi {{ person.first_name|default:'there' }}, it's [Founder name], the founder of [Brand]. You've had [Product] for about a week now, and I wanted to ask how it's going. If you reply to this email, it comes to our team and we read every one. If something isn't right, tell us and we'll sort it out. Thanks for giving us a try. [Founder name]
- No button and no images.

A4 · Day 28 · builds trust

- Subject: Would you review [Product]?
- Preview: It takes about a minute and helps other people decide.
- Body: Hi {{ person.first_name|default:'there' }}, if you've been using [Product], would you tell other people what you think? Every review is published, good or bad, and it takes about a minute.
- Button: Write a review

- Note: don't offer a reward for reviews, and don't hide low ones.

A6 · Day 60 · sells

- Subject: Goes well with [Product]
- Preview: Something many of our customers use alongside it.
- Body: Hi {{ person.first_name|default:'there' }}, a lot of people who use [Product] also use [Second product], because [plain reason they work together]. Here's a little more about it. [Short description, price.]
- Button: See [Second product]
- Pick the second product from a short list you choose yourself, not an automatic feed.

Gift track: the three emails

G1 · Straight away · builds trust

- Subject: Your order is confirmed
- Preview: Delivery dates for the holidays, and how returns work.
- Body: Hi {{ person.first_name|default:'there' }}, thank you for your order. If it's a gift, here's what's useful to know. Your order should arrive by [estimated delivery date]. [If your packing slips don't show prices, say so here.] If the person you're sending it to wants to return or exchange it, they have [X] days and can contact us at [email]. If this order is for you rather than a gift, reply and let us know, and we'll send you tips on using it instead.
- Button: Track your order

G2 · Day 7 · builds trust

- Subject: Your order has been delivered
- Preview: And a note in the box for whoever opens it.
- Body: Hi {{ person.first_name|default:'there' }}, your order should have arrived. We include a card in every gift order that tells the recipient how to get started and how to reach us. If anything went wrong with the delivery, reply and we'll fix it.
- Button: Contact us

G3 · Day 40 · sells

- Subject: Something for you this time
- Preview: [Your offer] on your own first order.

- Body: Hi {{ person.first_name|default:'there' }}, thank you again for choosing [Brand] as a gift. If you'd like to try it yourself, here's [your offer] on your own order, valid until [date].
- Button: Shop for yourself

Reaching the person who received the gift

You don't have the recipient's email address, and they're the one who will use the product. Put a small card in gift orders with a QR code that leads to a sign-up form: "Got this as a gift? Get the guide to using it." Signing up starts a short welcome with the usage guide and your normal first-order offer. This needs your packing team to include the card in tagged orders: [check with your fulfilment].

Optional: lapsed customers who return during the sale

Lapsed customers who come back for the 25% code are nearly as likely to drift away again as new buyers, and your normal post-purchase flow treats them like regulars. If you have time, copy the self-buyer track into a second flow:

- Trigger: Placed Order, between November 24 and December 2.
- Trigger filter: Placed Order at least 2 times over all time, and their previous order was more than 180 days ago. In Klaviyo, the simplest way to do this is to check membership of your Lapsed customers segment before the sale: add the static list "Lapsed on Nov 23" and filter on it.
- Keep A1 (reworded to "Welcome back"), A2 and A4, and drop the rest. Their next reminder comes from the replenishment flow.

05 Sale campaign copy

These are the seven campaigns from the calendar in section 02, written to edit and send. Send each one as a separate campaign per customer type, so every group gets the right code. Only mention limited stock or a deadline when it's true.

How to send one email to several groups

For emails that go to more than one group (Black Friday, Cyber Monday), make one campaign per group from the same template, and change only the offer line and the coupon tag. Klaviyo's Smart Sending stops anyone who's in two groups from getting both.

Email layouts

Every email uses one of four simple layouts. Keep images under about 20% of the email, use real text for headlines and prices, and use one button.

1. **Letter:** text only, from a person. Use it for the early access notice and the last-day email.
2. **Offer:** headline, two short paragraphs, the code in a box, one button. Use it for Black Friday and Cyber Monday.
3. **Product grid:** headline, one paragraph, three to six products with names and prices, one button. Use it for the gift guide and bundles.
4. **Reminder:** headline, one sentence, the code, the deadline, one button. Use it for follow-ups to people who clicked.

Figma layouts: figma.com/design/STDmj7XGSskBpwpL6zNVq7.

Nov 17 · Gift guide (everyone engaged in 90 days, no discount)

- Subject: Gift ideas for the people you look after
- Preview: Our most-given products this year, and the last day to order for December delivery.
- Body: Hi {{ person.first_name|default:'there' }}, if you're buying for someone this year, here are the [Brand] products people give most often, with a line on who each one suits. [Three to six products, each with one sentence and a price.] Order by [date] for delivery before December 24. Tick "This order is a gift" at checkout and we'll include a card with instructions for the recipient.
- Button: See the gift guide

Nov 22 · Early access notice (loyal and one-time customers)

- Subject: You can shop our sale early this year
- Preview: Early access starts Tuesday for our existing customers.
- Body: Hi {{ person.first_name|default:'there' }}, our Black Friday sale opens to everyone on Friday. Because you've ordered from us before, you can shop from Tuesday, November 24. We'll send your code that morning. [Loyal: Your order will also include [gift] free.] [If stock is genuinely limited: Some products sell out in the first days, so early access gives you first choice.]
- No button. This is a heads-up, not a sales email.

Nov 24 · Early access opens (loyal and one-time customers)

- Subject: Your early access code is here
- Preview: Shop the sale before it opens to everyone on Friday.

- Body: Hi {{ person.first_name|default:'there' }}, early access is open. Your code is below and works until December 1. [Loyal: Your code gives you 10% off, and every order includes [gift].] [One-time: Your code gives you 15% off, or try our [starter bundle].]
- Code: `{% coupon_code 'BFCM26_LOYAL' %}` or `{% coupon_code 'BFCM26_ONETIME' %}`
- Button: Shop early access

Nov 27 · Black Friday (new and lapsed customers; loyal and one-time get a short gift reminder)

- Subject (new and lapsed): Our Black Friday sale: [25]% off
- Preview: Your code works until Tuesday, December 1.
- Body: Hi {{ person.first_name|default:'there' }}, our Black Friday sale is on. Use your code below for [25]% off your order until December 1 at 11:59 p.m. [Lapsed: It's been a while since your last order, so this is a good time to restock.] Orders over [$X] ship free.
- Code: `{% coupon_code 'BFCM26_MAIN' %}`
- Button: Shop the sale
- Subject (loyal and one-time): Your code and gift are still available
- Body: A short reminder that your early access code works until December 1. [Loyal: Every order includes [gift].]

Nov 29 · Bundles (engaged in 30 days, haven't ordered since Nov 24)

- Subject: Sale bundles, priced below buying separately
- Preview: [Two or three bundles] for the sale only.
- Body: Hi {{ person.first_name|default:'there' }}, if you'd like to stock up, these bundles cost less than buying each product on its own. [Bundle name, contents, price, saving.] Your sale code works on bundles too.
- Button: See the bundles

Nov 30 · Cyber Monday (engaged in 90 days, haven't ordered since Nov 24)

- Subject: Cyber Monday: your code ends tomorrow night
- Preview: [25]% off until Tuesday at 11:59 p.m.
- Body: Hi {{ person.first_name|default:'there' }}, a reminder that your sale code ends tomorrow, Tuesday, December 1 at 11:59 p.m. After that, prices go back to normal. [If true: [Product] is running low.] Here are the products people have bought most this

weekend: [three products].

- Code: the same coupon tag as their Black Friday email.
- Button: Use my code

Dec 1 · Last day (people who clicked a sale email but haven't ordered)

- Subject: Last day for your sale code
- Preview: It stops working at 11:59 p.m. tonight.
- Body: Hi {{ person.first_name|default:'there' }}, this is the last email we'll send about the sale. Your code works until 11:59 p.m. tonight. If now isn't the right time, that's completely fine. Our next email will be about [something useful, not a sale].
- Button: Use my code
- Send it as a letter (plain text) from a named person.

Words to avoid in subject lines

Don't use all capitals, more than one exclamation mark, "act now", "guaranteed", "100%", "risk-free" or dollar signs. Don't say an offer has been "extended by popular demand" unless it actually was, and don't extend it if you said it was ending.

06 Sale-week flow rules

During the sale, your other flows should never add a second discount on top of the sale code or email someone who just bought. Make these changes by November 22 and undo them on December 2.

Flow	What goes wrong	What to change
Welcome series	A new subscriber gets the 10% welcome code and the sale code in the same week.	From Nov 24 to Dec 1, new subscribers get the sale code instead of the welcome code. Put the welcome-code email behind a conditional split on the date, or set it to Manual for those dates. The rest of the welcome content continues as normal.

Flow	What goes wrong	What to change
Standard post-purchase	A BFCM buyer gets both your normal flow and the BFCM welcome.	Add the filter bfcm26_group is not "test" (section 04). The holdout group gets only your normal flow.
Abandoned cart	A cart email adds its own code on top of the sale code.	During the sale, cart emails remind people of the code they already have and add no new one.
Browse abandonment	It sends on the same day as a campaign, which doubles the emails.	Turn on Smart Sending for it, or pause it from Nov 24 to Dec 1.
Replenishment	A full-price reminder lands on the same day as a 25% email.	Hold reminders due Nov 24 to Dec 1 (section 01).
Winback	A lapsed customer gets a winback code and the sale code.	Pause winback from Nov 17 to Dec 2. Lapsed customers get the sale emails instead.
Sunset	Sunset emails go to people who've just been emailed five times.	Pause sunset until January.
Gift orders	The buyer gets usage tips and reorder reminders for a product they gave away.	The gift tag sends them to the gift track and out of replenishment (sections 01 and 04).
Support tickets	Someone with an open complaint gets a sale email.	Exclude open tickets from every sale send (section 02).

If you have subscribers (Recharge, Skio or Loop)

Active subscribers can see a one-off sale price that's lower than their subscription price, and some will cancel and buy at the sale price instead. Treat active subscribers as loyal customers: give them early access and the gift, not the main code. Send them one email that explains what the sale means for their subscription, using your app's subscriber property in Klaviyo to find them (for example rc_active_subscriber for Recharge): [your subscription offer during the sale, if any].

07 Holdout framework and margin calculator

Use a holdout to measure whether the BFCM welcome flow brings more new customers back, and use the calculator to measure the margin saved by tiered offers. These are two different tests, and each one proves something different.

What you want to know	How to measure it	When you'll know
Did tiered offers save margin?	The Margin tab of the calculator, using order counts per code from Shopify's discount report. No holdout needed.	December 2
Did loyal customers order less because of the smaller offer?	Compare their order count with the same group's orders last BFCM.	December 2
Did the BFCM welcome flow bring more new buyers back?	The 20% holdout and the Holdout tab of the calculator.	90 days (late February) and 180 days (late May)
Did the stock-up timing help?	Reorder rate and days to reorder for multi-unit orders, against last year's BFCM buyers.	March

Klaviyo's attributed revenue isn't used for any of these. It credits an email for any order placed within a few days of it, including orders that would have happened anyway. For Klaviyo brands, email and SMS were credited with 42% of BFCM 2025 revenue, which shows how much credit attribution hands out.

Set up the welcome-flow holdout

The setup is in section 04, step 2: a random sample split sends 20% of BFCM new customers to your normal welcome and labels each profile with `bfcm26_group` = `test` or `holdout`.

Use 20%, not 10%. A $100k/month store gets around 300 to 600 new BFCM customers. A 10% holdout is 30 to 60 people, too few to read a repeat rate from. Even at 20%, the result may only be directional, and the calculator tells you how confident you can be.

To read it:

1. Build two segments: Properties about someone, bfcm26_group equals test; and bfcm26_group equals holdout. Note how many profiles are in each.
2. For each, add: Placed Order at least 2 times over all time. That count is the number who came back.
3. Enter both counts in the Holdout tab at 90 days and again at 180 days.

Using the calculator

The calculator is a separate Excel file, BFCM_Margin_Calculator.xlsx. Yellow cells are inputs and black cells are formulas. The example values are for the model store in section 03; replace them all with your own.

Margin tab. Enter your average order before discount, your gross margin, the three offers and the cost of the loyal gift. After the sale, enter how many orders used each code. It shows:

- The discount saved against one code for everyone. With the example values, that's $2,260, or 24% of the discount.
- How far loyal and one-time orders could have fallen before tiering stopped paying. With the example values, that's about 20%.

Holdout tab. Enter how many customers are in each group and how many placed a second order. It shows the difference in repeat rate, the extra second orders and revenue, and a confidence score with a plain reading of it. With the example values, the 180-day repeat rate is 21.9% against 16.0%, but the confidence reading is "too small to tell from noise", because the holdout has 106 people. That's a realistic outcome for a store this size: treat it as directional, and run the test again next season.

Sources

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