BFCM TEMPLATE KIT

Setup guide · building the BFCM program in Klaviyo

BFCM Template Kit · the templates use a sample brand, Morrow & Root (a supplements store). Swap in your own brand, products, prices and offers. Work through this guide in order, starting with the pre-flight checklist at the end, because DNS changes can take up to 48 hours.

28 email files, three treatments:

- **Designed** (20): editorial layout. Full-width photo hero with the headline as live text over the image, product features with short notes on how to take each one, and a quiet branded footer.
- **Letter** (6): logo, paper background, signature from Dana, branded footer. Files 11a, 11b, 11c, 16a, 16b, 16c.
- **Plain** (2): one-to-one text email with no design, built to get replies. Files 03 and 18.

Folders in **01 Email templates**:

- `1_html`: production HTML, one file per email. Photos are in `1_html/images`.
- `2_framed-mockups`: each email in a desktop window and a phone.
- `3_full-length-screenshots`: full renders at desktop (680px) and mobile (390px).
- `4_plain-text`: plain-text version of each email, plus subject B and preview text.

Flow 1 · BFCM welcome (trigger: Placed Order)

1. Trigger: Placed Order. Trigger filter: Placed Order equals 1 over all time. Turn the flow on Nov 24 and stop new entries Dec 3.
2. Flow filters, checked before every email: Placed Order equals 1 over all time; Refunded Order zero times since starting this flow; Shopify Tags doesn't contain "wholesale".
3. Time delay: 15 minutes, so the gift tag can sync.
4. Split, random sample: 20% → Update Profile Property `bfcm26_group` = `holdout` → end. 80% → `bfcm26_group` = `test` → continue.
5. Conditional split: Shopify Tags contains "gift-bfcm26". - Yes, gift track: 07 (immediately) → wait 7 days → 08 → wait 33 days → 09. - No, self-buyer track: 01 (immediately) → wait 7 days → 02 → wait 7 days → 03 → wait 14 days → 04 → wait 32 days → 06.
6. Normal welcome / post-purchase flow: add the flow filter `bfcm26_group` is not "test".

Flow 1b · Welcome back (trigger: Placed Order)

1. Trigger: Placed Order. Flow filters: in the list "Lapsed on Nov 23" (made on Nov 23 with "Convert to list" on the Lapsed segment); Placed Order at least once since starting this flow is false for each

later email.

2. 01b (immediately) → wait 7 days → 02 → wait 21 days → 04.

Flow 2 · Reorder reminders (trigger: Ordered Product)

1. Trigger: Ordered Product, filtered to products of one supply length (here, the 30-day products).
2. Flow filters: Placed Order zero times since starting this flow; Shopify Tags doesn't contain "wholesale".
3. Time delay: 15 minutes, then conditional split: Shopify Tags contains "gift-bfcm26" → yes: end.
4. Split on Quantity: equals 1 → wait 23 days; equals 2 → wait 53 days; 3 or more → wait 83 days.
5. Each branch: 17 → wait 7 days → 18.
6. Set both emails to Manual from Nov 24 to Dec 1, then send or cancel the held emails on Dec 2.
7. Test first: confirm Quantity appears in the split's dropdown. If it doesn't, split on Placed Order's Item Count instead.

Sale campaigns

Send in each recipient's local time with Smart Sending on. Every campaign excludes: ordered since Nov 24, not engaged in 180 days, wholesale tag, open support ticket.

File	Date	Audience
10	Tue Nov 17	Engaged 90 days (all customer types)
11a	Sun Nov 22	Loyal, engaged 90 days, not active subscribers
11b	Sun Nov 22	One-time, engaged 90 days
11c (S1)	Sun Nov 22	Active subscribers
12a	Tue Nov 24	Loyal + active subscribers, engaged 90 days
12b	Tue Nov 24	One-time, engaged 90 days
13a	Fri Nov 27	New prospects, engaged 90 days (91–180 only if spam rate < 0.1%)
13b	Fri Nov 27	Lapsed, engaged 90 days (91–180 only if spam rate < 0.1%)
13c	Fri Nov 27	Loyal + subscribers, engaged 90 (10% + tin, BFCM26_LOYAL)
13d	Fri Nov 27	One-time, engaged 90 (15%, BFCM26_ONETIME)

File	Date	Audience
14	Sun Nov 29	New and lapsed, engaged 30 days
15a	Mon Nov 30	New and lapsed, engaged 90 days
15b	Mon Nov 30	Loyal + subscribers, engaged 90 (10% + tin, BFCM26_LOYAL)
15c	Mon Nov 30	One-time, engaged 90 (15%, BFCM26_ONETIME)
16a	Tue Dec 1	New prospects + lapsed who clicked a sale email since Nov 27 and haven't ordered (25%, BFCM26_MAIN)
16b	Tue Dec 1	Loyal + subscribers who clicked a sale email since Nov 27 and haven't ordered (10% + tin, BFCM26_LOYAL)
16c	Tue Dec 1	One-time who clicked a sale email since Nov 27 and haven't ordered (15%, BFCM26_ONETIME)

Each group only ever receives its own code. Build each day's versions as separate campaigns and check the audience before you schedule. A main-code email (13a, 13b, 14, 15a, 16a) must never include loyal, subscriber or one-time segments.

Send pressure: new and lapsed get at most 5 sale emails. Loyal, subscribers and one-time get 5, plus the last-day email only if they clicked a sale email since Nov 27 and haven't ordered (6 at most).

Klaviyo blocks

- Designed emails: upload the photos in `1_html/images` to Klaviyo's image library, then replace each `images/...jpg` path in the HTML with the Klaviyo image URL (each hero uses its path three times: `background`, `background-image` and the Outlook `v:fill`). Then paste the file into a Custom HTML template.
- Rebuilding in drag-and-drop instead: hero = a Section with a background image and a Text block on top; product features = Split blocks (Image + Text); product grids = Table or Split blocks; code box = Text block with the coupon tag; footer = Text block.
- Letters and plain emails: a single Text block each.
- Coupon tags are already in the HTML: `{% coupon_code 'BFCM26_LOYAL' %}`, `BFCM26_ONETIME`, `BFCM26_MAIN`, `GIFTER15`. Each needs a matching Shopify coupon synced to Klaviyo.

Sample values to replace with your own before sending

- The photos are AI-generated sample images (product labels are left blank). Replace them with the brand's own product and lifestyle photography before sending, keeping the same crops: heroes

1200 × 1500 with calm space in the top 40% for the headline, product shots square on a plain background.

- Every link is `#`. Set each button and text link.
- Order rows in 01 and 01b show a sample order. Replace with a dynamic product block from the Placed Order event.
- Product names in 04, 17 and 18 are fixed to Magnesium Glycinate Sleep. Replace with the product from the trigger event, checking the property name in a test event.
- "What you ordered last time" in 13b shows Daily Greens. Replace with the last ordered product.
- 15a "Most ordered this weekend": update with real sales on Monday morning.
- The December 17 shipping cutoff, the 3 to 5 day delivery estimate, prices and the tagline are Morrow & Root sample values.

Pre-flight checklist

- [ ] SPF passes, DKIM signs with the brand's own domain and is aligned, DMARC at p=none or stricter with rua reporting.
- [ ] Branded sending domain verified in Klaviyo. One-click unsubscribe visible in Gmail.
- [ ] Gmail Postmaster Compliance Status clear; baseline spam rate noted.
- [ ] Smart Sending on for campaigns. Off for 01, 01b and 07 (order confirmations people expect).
- [ ] Quiet hours respected for SMS. One marketing email per person per day, flows included.
- [ ] Exclusion segments attached to every campaign.
- [ ] Seed tests sent to Gmail, Outlook and Yahoo inboxes. No layout guarantees the Primary tab; seed tests show where mail actually lands.
- [ ] Test orders through each flow branch: first order, gift order, 2-unit order, returning lapsed customer.