Getting Started Guide

The following checklist is your roadmap to getting your clients started with Klaviyo.

Completed?	Getting Started Task	Resources
Client Account Setup		
❏	I registered the lead in my partner portal	Submit a lead within your Partner Portal to ensure you get credit
❏	Sign up for a Klaviyo account	**Using your referral link** to create the account (located on your partner dashboard. We recommend using your email and adding your client as it can be quicker, but you can also have your client do this and add you as a user after)
❏	I walked through the setup wizard	Guide to the setup wizard
Bringing over my client's data		
❏	I integrated with their prior email service provider (if they already have a prior ESP)	Guide to migrating from another ESP

❏	I integrated with their e-commerce platform (or another platform if they're doing fundraising, etc.)	Switching Ecommerce Integrations
❏	I uploaded their list of existing subscribers (if they already have a list)	Create a list and upload your contacts
Upgrading up my client's account (if necessary)		
❏	I reviewed what plan they will need	Review pricing plan
❏	I upgraded their plan	Upgrade plan
Turn on their high engagement flows		
❏	I reviewed the pre-built Welcome Series flow, updated the content, and set the flow live	Turn your Welcome Series live
❏	I reviewed the pre-built Abandoned Cart flow, updated the content, and set the flow live	Turn your Abandoned Cart flow live
Point your client's signup forms to Klaviyo		

❏	I evaluated all of the current signup forms they have and compared them to available signup forms in Klaviyo	Understand your signup form options
❏	I swapped out the old signup forms for Klaviyo forms or I connected their existing 3rd party signup form to a list in their Klaviyo account	Check out our signup form resources and our list of 3rd party landing page and growth tools
Create an engaged list		
❏	I created a segment of their most engaged subscribers	Create a segment of your most engaged subscribers
❏	I cleaned the list of their least engaged subscribers	Clean your list of inactive or unengaged profiles
Sending your client's first email		
❏	I made a plan for sending the first campaign	Guide to Your First Send
❏	I designed an email in the drag and drop editor for the first campaign	Guide to Email Design

❏	I set up and sent out the first campaign	Create and send your first campaign
	Crunching through their numbers	
❏	I checked the analytics for the first campaign and looked at the open rate, conversion rate, recipient activity, and other reports	Review your campaign analytics
❏	One week after turning my flows live, I checked out the analytics for an individual flow email and looked at the open rate, conversion rate, recipient activity, and other reports	Review your flow analytics

Resources

You're ready to go, but really, this is just the beginning. Here are some MORE resources for your journey forward.

- **Klaviyo Partner Training**
  - If you do not already have access to our Klaviyo Partner Training site please reach out to klaviyopartnertraining@klaviyo.com to request access
  - If you have a log-in, navigate to partneracademy.klaviyo.com to access our library of training materials

- **Join a Live Training Session**
  - We run live training sessions each month for Partners specifically on different features and strategies, check out the Agency Slack Channel for dates, topics, and how to register
  - We also run live training sessions for customers, that are open to Partners as well every Monday thru Thursday, specifically geared towards getting started with Klaviyo.
  - Check out our topics and sign up for a session today.
- **Level Up Your Industry Knowledge**
  - Looking for new ideas or that next quick win? The Klaviyo Blog is always up to date with the latest e-commerce trends, benchmark reports, and other data-driven best practices to help you stay on top of the game.
- **Advanced Training Materials**
  - In the Partner Portal, we have more advanced documentation
    - Guide to Successfully Onboarding a Customer to Klaviyo
      - Onboarding customers to your agency is an opportunity to make a great impression, show the value of your agency, and set yourself up to retain the business long term. Use this guide to learn the best practices to set up your client for success with Klaviyo.
    - Guide to Successful Health Checks
      - Use this guide to understand how to continuously run health checks with your clients and ensure once they are set up they are hit the goals you have set together
    - Audit Scorecard
      - Use this document to audit and measure the performance of your client's email strategy to ensure you helping them hit key milestones and metrics to continuously prove ROI.
  - Also, check out our advanced training materials from the Klaviyo 2019 workshops. Step on the gas and take your email marketing into high gear