Email Product Guide & Best Practices

Klaviyo version - last updated: May 22, 2025

This guide will walk you through the very high level of how to use Orita's Email features in Klaviyo in order to accomplish your goals!

We've made this document pre-tty robust, but just know that your customer success manager will be happy to help you not only understand this guide, but also to execute your email strategy using Orita in much more depth.

This guide includes information about:

✦ **Engagement Levels:** Supercharge your email strategy by optimizing your audiences.

✦ **Grow Audiences:** Your most-likely-to-purchase-if-you-send-them-an-email-today list.

✦ **Automatic Profile Properties:** We automatically remove bots and other actions that optimize your email program, so you don't have to think about it.

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Engagement Levels

What are Engagement Levels?

Engagement Levels are groups of customer profiles, ranked from most to least engaged based on your brand's data. They're divided into five tiers, based on historical activity and patterns unique to you. "Highly Engaged" includes your most active and receptive email subscribers, while "Not Engaged" are the least active (honestly, we'd strongly recommend never emailing this group).

Importantly, Engagement Levels are dynamic and update daily! So the actual population of profiles in them will change based on both customer behavior and the "seasonality" of your email program.

TL;DR, more data driven segmentation so you can have confidence that you're messaging the right person at the right time, and not over-emailing others who will unsubscribe or not click (and hurt your reputation with Gmail).

How can I use Engagement Levels?

So many ways! Glad you asked.

You can use Engagement Levels to address specific email problems or execute an email revenue growth strategy.

If you're struggling with Deliverability, you might want to only email your highly engaged audience for a short while. Or if you're great with Gmail but in the doghouse with Hotmail, maybe do the top four tiers for GMail, and only the "Highly Engaged" for Hotmail.

You can also walk before you run by doing your standard segmentation AND adding Orita's Highly Engaged AND removing Not Engaged. Drive up your click rate, be the hero the Gmail needs, and start landing in the inbox.

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On a way-too-simplified level, we recommend you email your Highly and Moderately Engaged most often, and save Slightly, Rarely, and Not Engaged profiles for only major events, like BFCM, site-wide sales or a big product launch. Talk to your Customer Success Manager about how this fits into your marketing campaign calendar.

Best Practices

😟 **If deliverability is poor**: It's important to address deliverability *before* any other strategies. We'll help you diagnose the problem, then leverage tried-and-true Engagement Level playbooks to improve Inbox Placement and re-establish your sender reputation faster than traditional warming processes. Reach out to your CSM for support to get this step right.

🚀 **If deliverability is healthy:** ADD Highly Engaged profiles to all campaigns. This will help you safely increase campaign recipients while preserving your click rates and deliverability (by ensuring you add only those most likely to open, click, buy and otherwise engage positively).

Step-by-step

➤ [More info here](#) on how to send to specific Engagement Level segments in Klaviyo

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Grow Audiences

What is Grow Audiences?

Grow Audiences is a segment of your customers who are **most likely to buy if they receive an email this week**. You, um, should send to this list! It's good at making monies.

> 💡 **Hot tip**
>
> Grow Audiences are *additive* to your segmentation. When in doubt, ship it to these folks.

While many of the profiles in your Grow segment will be included in common segmentation strategies (like 90-day engaged profiles), it also captures those with high propensity to buy this week who fall outside recent segments (e.g. annual buyers who buy at the same time each year but do not engage with email in between purchases).

For most brands, this list will be smaller than your Orita Highly Engaged segment . This segment is updated weekly, on the day you've agreed with your CSM to receive it.

How can I use Grow Audiences?

Grow Audiences is additive to your existing segmentation strategy. Include any other standard segments you already use in your campaigns, and just add your Grow segment! If someone is in your segmentation and the Orita Grow segment, they'll still only get a single message

Grow Audiences will *not* work if you're sending to 100% of active profiles in your account. Why? Grow Audiences are meant to help you drive incremental revenue ... if you're already emailing everyone we can't exactly find anyone new for you 😅
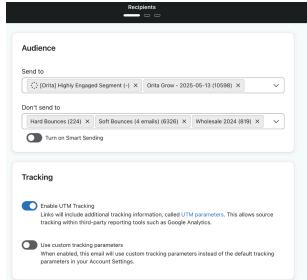
Curious how we measure incremental revenue lift?

Let our Co-Founder, Machine Learning expert, and person-with-the-best-hair-at-Orita DB, explain it to you ▶ How we measure incrementality

Best Practices

🚀 **Include** your weekly Grow segment in all campaigns

✖ **Avoid / use sparingly** other exclusions or filters to this list. Adding these will reduce the impact of your Grow segment.

  ✖ Exclusions we recommend **removing**:

  • Past purchase behavior (e.g. filtering out "7-day purchasers")

  ✔ Exclusions to **keep in place**:

  • Spam traps, bots, bounce protection, and inbox-specific exclusions we recommend to you, like for inbox warming.

  • Campaign-specific exclusions (geographies, types of buyers like wholesale, gender-based exclusions)

  ✖ Turn OFF Klaviyo Smart sending. Smart Sending is a deliverability tool designed to act as an exclusion filter. It may remove engaged individuals who, for example, have received email in the last 16 hours. Because you're already only sending to engaged folks with your Grow list, you don't need to add this filter.

Automatic Profile Properties

What are Automatic Profile Properties?

Orita automatically tags (& untags!) profiles with three types of properties: Non-human, Suppressions, and Reactivations.

✦ **Non-human** are bots, list bombing attacks, and other profiles that are not human and will never actually complete a purchase. They can cost you money, hurt your email performance, and obscure business performance by implying clicks and opens when there wasn't actually a human taking action. We automatically tag and suppress these profiles, and they are ineligible for reactivation. Read more about bots <u>here</u>.

✦ **Suppressions** include unsubscribed, marked spam, non-human, and the very least engaged people that you should not email (at least until there is signal of engagement!). Orita automatically suppresses these. Because they are not active profiles in Klaviyo, they do not count towards your billing. Importantly, we *will* reactivate folks when there is any hint of interest from the profile.

✦ **Reactivations** Orita automatically reactivates profiles that show signs of engagement (this is generally a very small # of people for most brands) from the suppression list.

- In cases where a brand has manually 'cleaned' a list (specifically manually suppressed profiles who have not unsubscribed, like from a sunset flow) profiles that show engagement will be reactivated here too.

- *This might show up marked "Rescued Revenue" in the future, to specify accounts that are Brand suppressed, Orita reactivated, and differentiate from Orita suppressed, Orita reactivated.*

💡 **Hot tip**

Stop thinking about Cleaning your list! Start thinking about optimizing it, and use Orita's models to figure out which of your previously cleaned profiles actually want to hear from you.

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✦ **Things to consider**

- Orita's decisioning runs in part on historical behavior, so you can anticipate large changes in automatic profile properties around seasonal/annual events.
- Orita runs an A/B test during the first 30 days of an account to ensure our models are suppressing the right cohort of unengaged profiles. After 30 days, the remainder of unengaged profiles will be suppressed, so you can anticipate a high volume of suppressions around day 31-34 of using Orita.

How can I use Automatic Profile Properties?

The main purpose of Automatic Profile Properties is for you to be able to track changes in each of these groups over time. For example, you can see how many bots Orita is suppressing for you: