

Angle	This page highlights how Klaviyo's architecture and AI support enterprise complexity, governance, and cross-team alignment. Go live in weeks, see ROI in days!
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CRM

The enterprise CRM guide for B2C brands

How to use a CRM to resolve fragmentation and deliver personalization at scale

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Summary:

Why enterprise teams need a smart CRM

Enterprise teams manage complex data ecosystems, multiple teams, and high customer expectations across regions and product lines—and they need their CRMs to handle that complexity.

Without unifying their massive datasets, enterprise teams can face barriers to justifying new initiatives across global offices. This ultimately slows innovation and adaptation to new market conditions.

But the good news is that modern CRMs are easier than ever to implement—even for enterprises. With the right platform, enterprise teams can get set up in weeks instead of months, launching campaigns and flows within days to start driving ROI.

Here's how enterprise B2C brands can use a modern CRM to unify large datasets across multiple platforms, personalize millions of customer experiences at scale, and ultimately drive retention and growth.

In this guide:

[Unifying data sources](#)

[Building dynamic segments](#)

[Scaling omnichannel efforts](#)

[Personalizing across channels](#)

[Leveraging AI](#)

[Supporting cross-team collaboration](#)

[Streamlining customer service](#)

[Maintaining compliance and data security](#)

[Analyzing ROI](#)

1. Unify massive datasets and eliminate data silos

One of the biggest challenges enterprise B2C brands face is making sense of fragmented customer data scattered across multiple systems. Without unified data, marketers don't have a clear grasp on their customers' preferences and behaviors, and as a result can lose out on lucrative opportunities to scale revenue.

But with a unified dataset, marketing and customer service teams share a single source of truth of each customer's activity.

An enterprise CRM pulls together customer data from ecommerce transactions, omnichannel marketing engagement, service tickets, in-store activity, loyalty programs, and more into a single platform. With this holistic view, global teams can manage millions of customer interactions at once, coordinate campaigns and flows across regions, and still deliver the kind of personalized experiences that drive growth.

Enterprise teams using a *lot* of software can take advantage of [built-in integrations](#) and flexible APIs to centralize data from marketing, sales, support, and analytics, ultimately reducing manual data syncing and inconsistencies between platforms.

For example, with an enterprise CRM, global marketing and customer service teams can identify customers who shopped in-store for back-to-school, returned items via a [self-service hub](#) a week later, then bought with a discount offer you sent automatically to correct the mistake.

2. Use dynamic segmentation to access real-time audiences

Enterprise marketers routinely target customers based on behavior such as past purchases, discount shopping, high spending, and more. Because all customer data is captured in one place in an enterprise CRM, segments update automatically, in real time.

[Dynamic segmentation](#) categorizes customer profiles into distinct groups based on pre-defined rules. After the criteria is set, the segments populate (or contract) automatically in real time as customer interactions happen. No-code segment builders in enterprise CRMs make it easy for marketers to create and refine audiences without waiting on engineering support.

[RFM \(recency, frequency, monetary\) analysis](#), meanwhile, makes it easy to identify high-value customers, at-risk buyers, and loyal repeat purchasers for targeted campaigns. Enterprise teams can take this further by creating tiers within each segment—for example, different levels of high-value customers to serve with personalized, premium experiences.

Gourmet popcorn retailer [Garrett Popcorn](#), for example, built segments of their most engaged customers, plus predictive segments of customers likely to order soon. By tailoring campaigns to these high-intent audiences, they reduced spam complaints by 40% YoY and generated [4x higher revenue per recipient](#).

3. Scale and automate omnichannel marketing efforts

Klaviyo's [2025 online shopping report](#) found that 77% of omnichannel consumers shop across 3–4 channels before purchasing. [Omnichannel marketing](#) that reaches the customer throughout the entire customer journey is now a must, but it also needs to be personalized to the consumer.

With an enterprise CRM, teams can design multi-step, multi-segment, omnichannel campaigns from a single unified platform across email, SMS, mobile push, WhatsApp, and more—with complete visibility into how audiences engage with which messages, when, and where.

[Marketing automation](#), meanwhile, delivers contextual experiences across email, SMS, mobile push, WhatsApp, and more without manual intervention. For enterprise teams, this means automated messages can drive growth across massive customer bases and capture revenue you would otherwise lose.

For example, a [browse abandonment flow](#) can automatically send a text message offer 24 hours after a shopper browsed a product page but didn't place an item in their cart. Automated post-purchase campaigns can drive repeat purchases, turning single transactions into multiple revenue opportunities.

With sophisticated features like conditional splits, you can also use flows to target high-value segments with premium offers. For example, you may want your [abandoned cart flow](#) to only include a discount for high-value carts, whereas lower value carts contain only product education.

4. Personalize across channels in real time

A CRM can also personalize brand communications so every customer gets the right message at the right time. [Personalization](#) uses permission-based data to tailor experiences to each person's lifestyle and behavior.

Let's say you're an enterprise fashion retail brand. You can tap into CRM data to create an automated flow that targets customers who frequently purchase new workout gear. You can specify that you'd like to send push notifications in the evening to those who regularly go on the mobile app during those hours, and email lookbooks to those who regularly browse on desktop in the daytime.

Within those messages, you can include product recommendations based on past browsing behavior. You can even tailor these messages to where shoppers are in their customer lifecycle, encouraging referrals for your VIP customers and sharing relevant reviews with newbies.

When you do it right, personalized marketing creates customer journeys that feel relevant and timely, helping people quickly find and purchase the products they want. When shoppers feel understood and valued, they're more likely to return—boosting engagement, conversion rates, loyalty, and revenue.

Unlike broad 1:many campaigns, 1:1 personalization tailors every touchpoint to an individual's unique preferences. Online nursery [Fast Growing Trees](#), for example, [rolled out a personalized strategy](#) for two-way text messaging by asking customers which product category they'd like to shop next, then following up with a link to the relevant category page.

5. Use AI to take personalization even further

Enterprise marketers manage millions of customers, generating vast amounts of data they can leverage to anticipate behavior and preferences. An [AI-powered CRM](#) turns that data into informed decisions, forecasting what customers are likely to buy, when they'll engage, and which messages will resonate—and allowing teams to deliver [hyper-personalized experiences](#) at scale.

Enterprise teams can scale personalization with AI to:

- Deliver the best variant of an email or SMS to each individual customer.
- Automatically predict which channels each customer prefers.
- Forecast a customer's next order date, lifetime value, or churn risk so teams can send proactive offers.
- Build multi-step flows, segments, email subject lines, text messages, and review responses with simple text prompts.
- Send messages based on when customers are most likely to engage.

- Analyze review sentiment to understand what customers are loving (or not).
- [Optimize web form timing](#) to maximize form submissions.

Luxury blanket brand [Saranoni](#) used AI to optimize website form timing, discovering a winning configuration that [boosted submissions by 14%](#). They also used AI to create geotargeted segments, saving up to 30 minutes per segment for more complex work.

6. Support collaboration between marketing and service

When marketing and [customer service](#) work in silos, the customer experience suffers—agents lack context, marketers miss lucrative opportunities, and customers feel like they’re starting over at every interaction.

A modern enterprise CRM improves collaboration by giving both teams a unified, real-time view of each customer’s profile so the experience feels smooth on the other side.

With this shared data, support agents can see a customer’s purchase history, website activity, and channel engagement. They can quickly understand the context of the interaction, confirm details without asking the customer to repeat themselves, and improve their responses.

In turn, marketing teams can use service data like return reasons or support tickets to trigger or suppress campaigns with educational content, loyalty incentives, or up-sells. All of the above leads to deeper personalization, better alignment across departments, and more opportunities to increase revenue and average order value.

7. Streamline customer support efficiencies

62% of consumers would prefer to shop with AI that remembers their purchase history over explaining their preferences to sales associates, according to Klaviyo’s 2025 [BFCM forecast](#).

With a CRM, you can meet rising consumer expectations while making life easier on your team by implementing:

- **A self-service customer hub:** a signed-in account experience directly on your website where customers can manage orders and subscriptions, initiate returns, discover personalized product recommendations, find helpful resources, and get help when they need it
- **AI agent for customer service:** a 24/7 AI assistant trained on your storefront that helps before and after the purchase—answering questions, recommending products, and resolving issues instantly, then escalating to a human agent when necessary
- **Omnichannel helpdesk:** a unified workspace across email, chat, SMS, and social, providing both AI and human agents with full customer context so they can solve customer problems faster from a single inbox

The results? Higher customer satisfaction, lower support ticket volume.

8. Maintain governance, compliance, and data security

For enterprise brands, one data breach or compliance misstep could mean millions in fines, lost customer trust, and lasting reputational damage. With complex global operations and evolving regulations, governance and security are critical business priorities and must be woven into all marketing strategies.

An enterprise CRM should offer SOC 2 Type II and ISO27001 certifications, GDPR readiness, and enterprise-grade security by design. Look for advanced access controls, multi-account management, role-based permissions, and detailed audit logs to make sure every action is traceable.

Built-in data hygiene features like automatic cleanup, duplicate detection, and profile merging keep records accurate, while consent management at every touchpoint ensures customer preferences are always respected.

When governance, compliance, and security are baked in, marketers can innovate confidently, knowing every campaign meets the highest standards for data and customer protection.

9. Analyze ROI across channels, messages, and segments

At the enterprise level, analytics and reporting needs to go beyond opens and clicks. An enterprise CRM can give you a better view of the entire customer experience, so that you can see your audience's motivations, optimize key touchpoints, and turn engaged users into advocates.

Here are a few [marketing analytics](#) CRM features worth their weight in gold to enterprise brands:

- **Funnel and cohort analysis:** Visualize customer experiences, filter for specific audiences, and spot new opportunities.
- **Omnichannel, linear multi-touch attribution:** Understand how channels and messages work together to drive sales, with a full view of all your touchpoints, paid or owned.
- **Optimization opportunities:** Compare audiences at scale, pinpoint top segments, and zero in on areas of improvement.
- **Easy-to-read reports:** See a full overview of conversions, purchase behavior, business performance, and marketing impact.

If you want to keep an even closer eye on your marketing performance, you can set up [automated alerts](#) when flows aren't triggered as often, deliverability rates drop, or messages aren't being sent. That way, you'll know right away when strategy needs to shift—and you won't have to wait for your analytics team to tell you.

Get set up in weeks, see ROI in days with Klaviyo B2C CRM for enterprise

Enterprise marketers need a platform that can unify massive datasets, enable real-time personalization, and automate engagement across channels—all while maintaining the highest standards for governance and security. The right CRM makes this possible, breaking down silos and helping teams collaborate to deliver exceptional customer experiences at scale.

[Klaviyo B2C CRM](#) is built for the speed, scale, and complexity of enterprise marketing. With rapid implementation, powerful AI capabilities, and enterprise-grade compliance, Klaviyo helps enterprise marketers set up personalized, measurable campaigns in weeks—and start seeing their impact in days.

<p>Ready to transform your customer relationships?</p> <p>Take our B2C CRM readiness assessment to discover your next steps.</p> <p>[Take the quiz]</p>	<p>How to build exceptional customer experiences</p> <p>The ultimate benefit of a CRM is the customer experiences you can create.</p> <p>[Learn how]</p>	<p>How to improve your customer experience for higher CLV</p> <p>A better customer experience should equate to more lifetime value.</p> <p>[Learn more]</p>
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<CTA> Klaviyo has everything enterprise teams need to engage customers and build relationships at scale. [Get a demo](#)