megovia

Retention Readout

Sample report, simulated data

Prepared by Megovia

What the agent found

We read every order and email send for Demo Brand from Apr 1, 2025 to Sep 30, 2026. Three things stand out.

1 **Spring Refresh really worked: about $38K in real lift over 90 days, 1.7 times what your email tool credited.**

Repeat it with the same audience and offer, and keep a 10% holdout.

2 **Welcome Series isn't adding anything we can measure: over 90 days, people who got it spent no more than the 10% held out.**

Retire this version and test a new one against a holdout.

3 **26% of the Spring Refresh list would have bought within 90 days anyway.**

Judge each send by its lift over a 10% holdout, not by the credit it gets.

Data examined

Apr 1, 2025 to Sep 30, 2026 (up to 18 months)

76,515 orders · 30,000 customers

36 email campaigns · 3 flows

Your team keeps every decision.

Management summary

For the monthly review, judged at 90 days: what email added (the campaigns sent from Apr 1, 2025 to Sep 30, 2026, and the flows), the campaigns that did best and least, and what to do next month.

What email added	Label	Count	Lift, 90 days
Campaigns with a final result	Measured	2	$36.3k
Campaigns with a final result	Estimated	20	$166.9k
Flows with a final result	Measured	1	−$17.9k
Flows with a final result	Estimated	1	$92.1k

Each line adds up the campaigns' or flows' own lift; campaigns that reached the same people overlap, so the sum is not one measure of email's whole effect. Not added: 14 campaigns and 1 flow uncertain or without a final result at 90 days yet.

The three that added the most	Label	Lift, 90 days	Range
Summer Single Origins Sampler Deal	Estimated	$49.6k	$44.3k to $55.2k
Spring Refresh: 20% Off Brewing Gear	Measured	$37.9k	$23.3k to $51.9k
Spring Blend Pre-Order	Estimated	$37.0k	$32.5k to $41.7k

The three that added the least	Label	Lift, 90 days	Range
Cyber Monday: Last Chance	Estimated	−$8.1k	−$21.1k to $5.0k
Winter Warmers	Estimated	−$4.9k	−$20.1k to $9.9k
Members' Weekly Picks	Estimated	−$2.3k	−$7.3k to $2.6k

Next month

1. Send your next campaign with a 10% random control group: take a first look after 30 days and read the result after 90 days.
2. Feature Pour-Over Starter Kit in the welcome flow and in first-purchase offers.
3. Review the first-order discount policy: test a smaller offer against the current 30%+ one.

From the report's fixed rules; each rests on a finding in this report.

01

Credit isn't impact

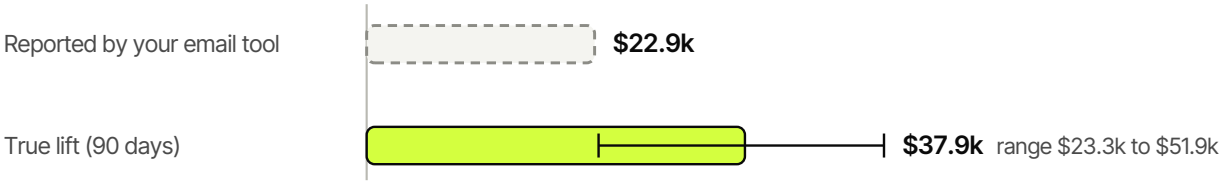
Klaviyo credits a campaign with orders placed within its attribution window (5 days by default) by people who opened or clicked it. Many of those customers would have bought anyway.

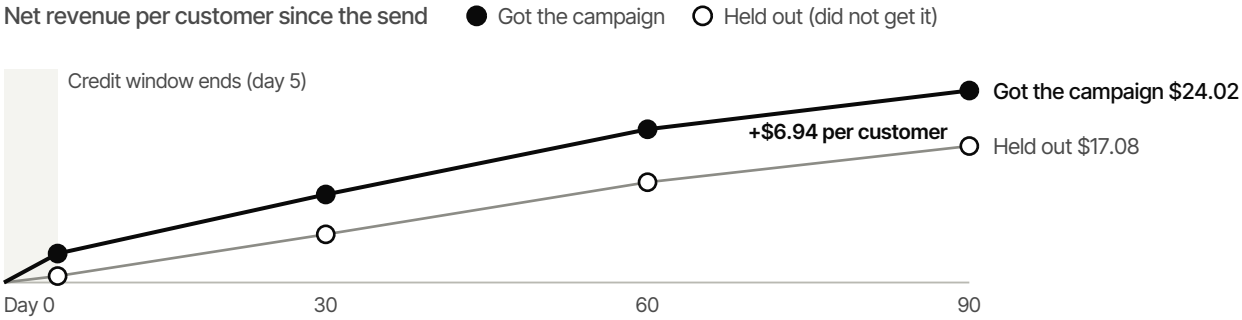


What actually happens

Most repeat buyers come back within 51 days, so we judge results at 90 days.

Spring Refresh: 20% Off Brewing Gear, measured with a 10% holdout





The agent found that Spring Refresh kept adding sales for 90 days.

What happened	Customers who got Spring Refresh spent $6.94 more each over the next 90 days than the 10% held out: about $38K in all (range $23K to $52K). Your email tool credited $23K within its 5-day window.
Why	Credit counts orders placed within its window by people who opened or clicked, including orders from customers who would have bought anyway: 26% of the people held out ordered within 90 days without the email. And 59% of the real lift came after day 5, outside the credit window.
What to do	Repeat Spring Refresh with the same audience and offer, and keep a 10% holdout to confirm the lift.

02

Which campaigns truly bring customers back

What each campaign added in net revenue, 5, 30, 60 and 90 days after the send, compared with customers who didn't get it.

Of 36 email campaigns, we could measure 27: 7 clearly brought customers back over 90 days, and for 20 the range includes zero, so past data can't tell whether they worked. The other 9 were too small to measure.

The agent found 7 campaigns that clearly bring customers back.

What happened	Summer Single Origins Sampler Deal added the most: about $50K over 90 days, $8.15 per customer. Next came Spring Refresh, with about $38K.
Why	Their lift keeps building after the credit window: 67% of it came after day 5, which the credit doesn't count.
What to do	Repeat what these did, and give the next send like any of the other 20 a 10% holdout.

Credited: what your email tool reports (order totals with shipping and tax, before refunds, of orders placed within 5 days by people who opened or clicked). Lift: extra net revenue (after refunds, without tax and shipping), in total and per customer over 90 days. Range: the 90% interval of the 90-day lift.

Measured against a random holdout · Estimated against similar customers · Uncertain mixed with other sends

		Lift after						
Campaign	Credited (5 days)	5 days	30 days	60 days	90 days	Per customer	Range (90 days)	Label
Clearly brought customers back (7)								
Summer Single Origins Sampler Deal	$24.5k	$15.9k	$35.3k	$43.2k	$49.6k	$8.15	$44.3k to $55.2k	Estimated
Spring Refresh: 20% Off Brewing Gear	$22.9k	$15.4k	$27.3k	$36.2k	$37.9k	$6.94	$23.3k to $51.9k	Measured
Spring Blend Pre-Order	$19.0k	$12.8k	$24.5k	$31.1k	$37.0k	$8.35	$32.5k to $41.7k	Estimated
Free Brew Guide + 15% Off Gear	$13.7k	$8.6k	$18.9k	$22.4k	$26.1k	$6.41	$21.3k to $30.6k	Estimated
Ethiopia Yirgacheffe Is Back	$13.5k	$8.2k	$17.0k	$21.7k	$23.0k	$6.86	$18.6k to $27.4k	Estimated
Halloween Treats	$4.4k	−$186	$2.3k	$5.7k	$9.3k	$1.91	$929 to $18.5k	Estimated
Tea Time Favorites	$1.1k	$410	$510	$989	$2.1k	$2.42	$338 to $4.0k	Estimated
No clear effect: the range includes zero (20)								
Holiday Shipping Deadlines	$2.7k	$3.3k	$12.0k	$21.9k	$11.6k	$1.57	−$8.6k to $31.0k	Uncertain
How to Store Your Beans	$8.9k	$3.3k	−$788	$7.1k	$11.3k	$1.11	−$5.1k to $27.2k	Estimated

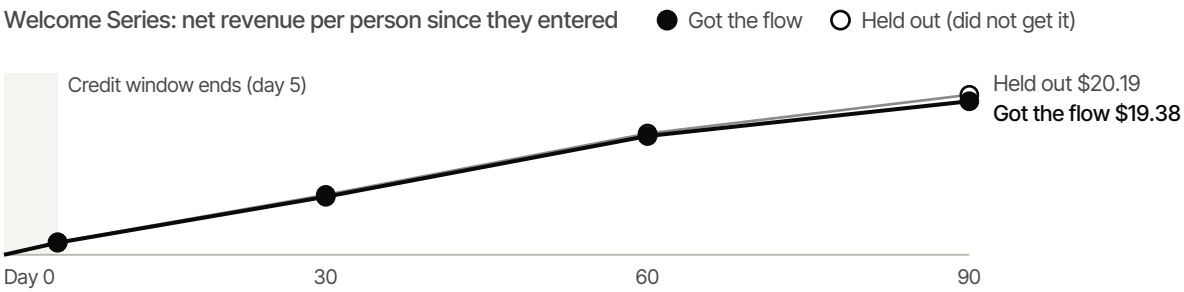
		Lift after						
Campaign	Credited (5 days)	5 days	30 days	60 days	90 days	Per customer	Range (90 days)	Label
Spring Cleaning for Your Grinder	$8.3k	$3.7k	−$263	$10.8k	$6.7k	$0.63	−$10.0k to $23.8k	Estimated
National Coffee Day Preview	$3.8k	−$834	−$1.3k	$4.2k	$6.0k	$1.42	−$7.1k to $17.7k	Estimated
Last-Minute Gifts	$4.3k	$1.5k	$5.5k	$9.7k	$4.8k	$0.69	−$7.4k to $17.6k	Uncertain
VIP Early Access: Winter Roasts	$3.7k	$698	$1.6k	$3.5k	$3.8k	$1.07	−$1.1k to $8.4k	Estimated
Summer Cold Brew Guide	$1.9k	−$571	−$68	$2.0k	$3.6k	$2.68	−$1.5k to $8.7k	Estimated
Year in Coffee	$7.1k	$876	$3.2k	−$1.7k	$3.3k	$0.44	−$16.5k to $22.4k	Estimated
Behind the Bean: Farm Stories	$1.9k	−$516	$1.5k	$1.7k	$2.9k	$1.90	−$1.7k to $8.0k	Uncertain
Time to Restock?	$3.0k	−$577	$1.2k	$1.9k	$1.8k	$0.49	−$3.0k to $6.7k	Estimated
Valentine's Day Bundles	$7.5k	$2.2k	$2.4k	$2.2k	$1.5k	$0.17	−$13.2k to $14.5k	Estimated
Father's Day Gear Guide	$999	−$701	−$900	−$794	−$283	−$0.22	−$5.1k to $4.6k	Uncertain
Back to School Fuel	$3.1k	$246	−$1.6k	−$2.1k	−$500	−$0.16	−$10.1k to $8.9k	Estimated
Customer Favorites	$7.9k	−$1.8k	−$7.6k	−$1.7k	−$541	−$0.06	−$19.9k to $17.3k	Estimated
Reorder in One Click	$4.6k	$102	$3.3k	$2.4k	−$1.6k	−$0.44	−$13.2k to $9.0k	Measured
Your Favorites, Ready to Ship	$3.3k	−$245	−$1.5k	−$88	−$1.8k	−$0.46	−$6.7k to $3.4k	Estimated
Matcha Masterclass	$2.1k	−$864	−$1.3k	−$2.0k	−$2.3k	−$0.66	−$5.9k to $1.4k	Uncertain
Members' Weekly Picks	$3.7k	−$458	$606	$361	−$2.3k	−$0.54	−$7.3k to $2.6k	Estimated
Winter Warmers	$6.9k	$245	−$7.6k	−$7.9k	−$4.9k	−$0.62	−$20.1k to $9.9k	Estimated
Cyber Monday: Last Chance	$5.5k	−$2.7k	−$3.0k	−$6.7k	−$8.1k	−$1.32	−$21.1k to $5.0k	Estimated

03

Which flows earn their place, and which don't

Each flow compared with people who didn't get it, over the 90 days after they entered.

Flow	Type	People measured	Per customer (90 days)	Total (90 days)	Range (90 days)	Label
Abandoned Checkout	Abandoned cart	-	-	-	-	Uncertain
Post-Purchase	Post-purchase	12,170	$7.57	$92.1k	$77.6k to $105.8k	Estimated
Welcome Series	Welcome	21,937	−$0.82	−$17.9k	−$48.4k to $12.1k	Measured



The agent found that Welcome Series isn't adding anything we can measure.

What happened	Over 90 days, people who got Welcome Series spent $19.38 each; the 10% held out spent $20.19. The difference, −$0.82 per person, is within the range of chance (−$2.21 to $0.55).
Why	31% of people who got it ordered within 90 days, and 32% of those held out did too: they would have bought anyway.
What to do	Retire this version and test a new one against a 10% holdout.

The agent found that Post-Purchase earns its place.

What happened	Customers who entered it brought an estimated $7.57 more each over 90 days than similar customers who didn't: about $92K in all (range $78K to $106K).
Why	It reaches new customers in the weeks when most second orders happen. This is an estimate from similar customers, not a holdout.
What to do	Keep it on, make sure every eligible customer enters it, and add a 10% holdout to get a clean answer.

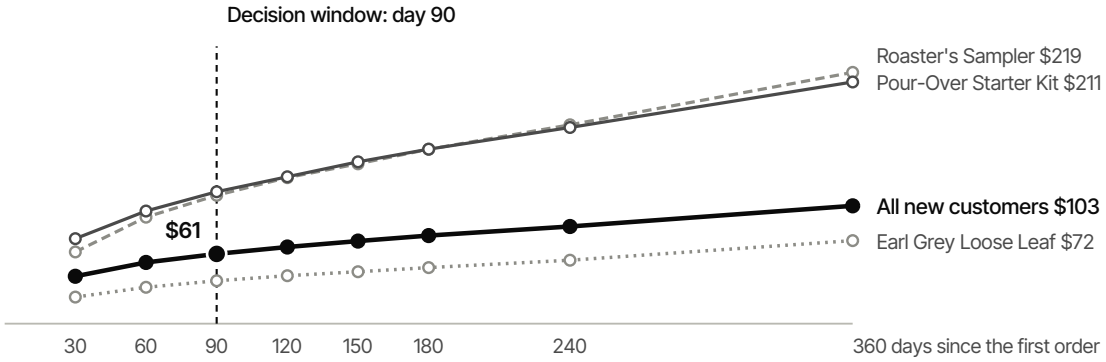
Abandoned Checkout couldn't be measured: this flow starts when someone begins a checkout, which is not in the data, so there is no fair comparison group. A 10% holdout would measure it.

04

What makes a customer worth more over time

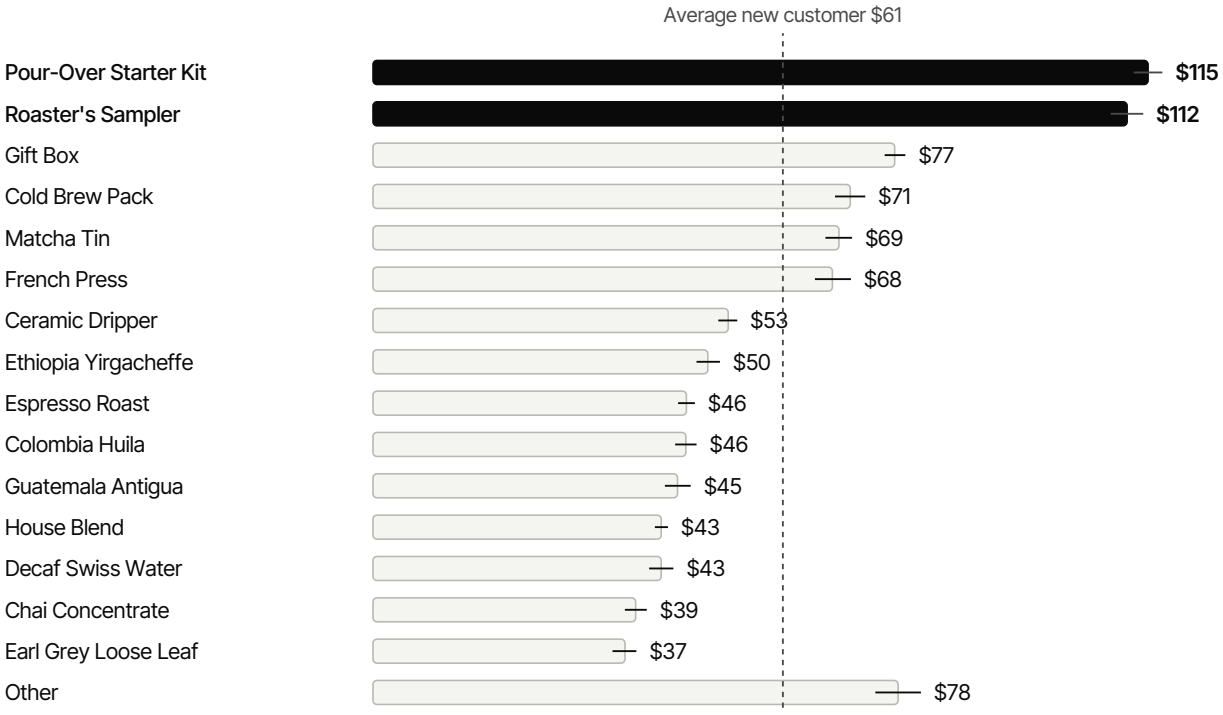
Net revenue from new customers over time, and in their first 90 days by what they bought first, the discount on their first order and where they ordered.

LTV over time

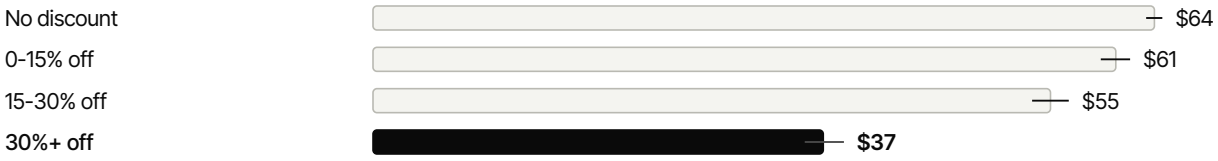


Average net revenue per new customer since the first order (after refunds, without tax and shipping). Each point counts only customers who had that many days by Sep 30, 2026, the end of the data, so later points rest on fewer, earlier customers; points with fewer than 100 customers, or that would let such a group be worked out, aren't shown. The dashed line marks the decision window; grey lines are the first product groups that differ most from the average at day 90.

First product



First-order discount



These are patterns, not proof of cause. Test them with a holdout before acting.

The agent found that the first product matters most.

What happened	New customers whose first order was Pour-Over Starter Kit brought $115 each in their first 90 days, 89% more than the average new customer ($61). Roaster's Sampler also stands out ($112).
Why	They come back more often: 75% ordered again within 90 days, against 39% of all new customers. This is a pattern, not proof that the product causes it.
What to do	Test featuring Pour-Over Starter Kit in the welcome flow, with a 10% holdout.

The agent found that deep first-order discounts bring less valuable customers.

What happened	Customers whose first order had a 30%+ discount brought $28 less in their first 90 days than full-price customers ($64), even after accounting for when they bought and how much they spent.
Why	Only 24% of them ordered again within 90 days, against 40% of full-price customers.
What to do	Test a smaller first-order offer against the current 30%+ one, with a holdout.

Where they ordered

Channel	New customers	Value in 90 days	Ordered again in 90 days
Online store	24,620	$60.79	39%
iPhone app	2,108	$60.56	40%
Android app	1,523	$60.98	40%
Other app	1,163	$61.10	42%
Draft order	586	$60.72	42%

05

When customers come back for a second order

41% of new customers order again within a year. Half of those who return do so by day 35, and 80% by day 55. After that, few come back.

Days from the first to the second order



Dark bars: the first 55 days, when 80% of returning customers place their second order.

The agent found a short window for the second order.

What happened	80% of returning customers placed their second order within 55 days of the first; half did so by day 35.
Why	A customer who hasn't come back by day 55 has a 12% chance of ordering again within a year, against 41% for a new customer.
What to do	Test a repeat-purchase message a week before day 35, with a 10% holdout.

Share of each month's new customers who ordered again

Cohort	New customers	Month 1	Month 2	Month 3	Month 6	Month 12
Apr 2025	1,035	15%	36%	42%	42%	42%
May 2025	1,116	12%	34%	41%	42%	42%
Jun 2025	1,106	12%	34%	39%	40%	40%
Jul 2025	1,248	13%	34%	39%	40%	40%
Aug 2025	1,361	12%	34%	40%	42%	42%
Sep 2025	1,395	13%	35%	39%	40%	40%
Oct 2025	1,459	14%	37%	41%	42%	
Nov 2025	1,910	12%	31%	35%	37%	
Dec 2025	2,167	11%	31%	35%	36%	
Jan 2026	1,636	12%	36%	40%	41%	
Feb 2026	1,614	15%	37%	41%	42%	
Mar 2026	1,727	14%	36%	40%	41%	
Apr 2026	1,890	13%	35%	39%		
May 2026	1,965	13%	36%	41%		
Jun 2026	1,975	13%	36%	41%		
Jul 2026	2,134	13%	33%			
Aug 2026	2,121	13%				

06

What to test next, with a holdout plan

Repeat Spring Refresh, retire the Welcome Series variant, test a win-back with a holdout.

1 **Repeat Spring Refresh**
The same audience and offer, with a fresh holdout.
It added about $38K over 90 days last time.

2 **Replace the Welcome Series variant**
A new version for everyone who enters it, with a 10% holdout.
Against its holdout, the current version added nothing measurable over 90 days.

3 **Test a win-back at day 55**
One email to first-time buyers who haven't ordered again 55 days after their first order.
After day 55, only 12% of them come back within a year.

How each test runs

Holdout	10% of the audience, picked at random. They get nothing from the test and everything else as usual.
Measure	Incremental 90-day LTV per customer: net revenue after refunds, without tax and shipping, from the send day to day 90.
What a test can detect	For a campaign of your usual size (about 7,434 recipients, 743 held out): a change of 4.1 percentage points in the share who order within 90 days (24% do now), or $3.41 per person in 90-day net revenue.
Leave out	Anyone already in another test's holdout, so each answer stays clean.
Read the result	A first look after 30 days, the answer after 90 days.

Setting it up in Klaviyo

1. Create a random 10% sample of the audience in Klaviyo and name it as the holdout.
2. Send to the audience as usual, with the holdout list excluded.
3. Leave the holdout unchanged for 90 days: no one added or removed.
4. Share the holdout list with Megovia, and we measure the result.

Your team keeps every decision.

07

How we measured

Every campaign and flow result in this report carries one of three labels.

Measured	Compared with a random holdout that didn't get the campaign or flow. The difference is the lift. This is the most reliable answer. In this report: Spring Refresh: 20% Off Brewing Gear, Reorder in One Click and Welcome Series.
Estimated	No holdout, so we compared people who got it with similar people who didn't: the same recency, number of orders, past spend and customer age. Good for ranking; only a holdout gives a clean answer.
Uncertain	We could not separate the effect: most recipients got other campaigns within 7 days, or the data needed for a fair comparison is missing.

When results are judged

At 90 days, for the reason given in section 01. Of the 2,979 new customers in the analysis period whose first order was at least a year before the end of the data and who came back within a year, half did so within 35 days and 75% within 51 days. The rule takes the smallest standard window (90, 120, 180, 240 or 360 days) that is at least 1.5 times that, or the longest one: 90 days.

Limits

- The credit your email tool reports is order totals with shipping and tax, before refunds, within its credit window. Lift here is net revenue after refunds, without tax and shipping, over 90 days.
- Estimated campaign results cover customers who had ordered before the send; measured results cover everyone the message reached.
- Campaigns and flows need at least 300 people in each group and 70% of them matched; smaller ones are left out. A campaign sent less than 90 days before the end of the data shows its latest full window as an interim result; a window that hasn't ended is not yet available, never estimated.
- No individual customer appears in this report, and no group of fewer than 100 customers is shown.
- Orders from Apr 1, 2025 to Sep 30, 2026, in America/New_York time.
- This report measures email only; SMS is excluded.

Notes on this data

- Flows are grouped by role from their names (welcome, post-purchase, abandoned cart, other); tell us if a flow's role is wrong and we correct it.
- A cohort is the group of customers whose first order fell in the same month (America/New_York). Month k means 30k days after each customer's first order; a cell stays empty until every customer in the cohort has had that long.

08

Your data stays yours

We ask for the least access possible and keep it for the shortest time.

Read-only access.	We never change anything in your Klaviyo account.
Emails coded before analysis.	Every address is pseudonymized: replaced with a keyed code before any analysis runs. This is not anonymization, so we keep protecting them as personal data.
Deleted within 30 days.	Raw files and our coded working copies are removed within 30 days of delivering the report, or sooner on request. Coded measurement records (which customer code was in which test group; never an email) are kept only for the measurement, at most 13 months, with your approval.
NDA and DPA.	We sign a data processing agreement (DPA) with every brand before any data is shared, and an NDA on request.

Appendix

Definitions

Holdout	A random group that doesn't get a campaign or flow, so its results show what would have happened anyway.
Lift	What a campaign or flow added: what its group did beyond the holdout, or beyond similar customers when there is no holdout.
Credit window	The days in which an email tool credits orders to a message. Klaviyo credits a campaign with orders placed within its attribution window (5 days by default) by people who opened or clicked it.
LTV	Net revenue from a customer over a set time: after refunds, without tax and shipping.
Incremental 90-day LTV	The lift in LTV per customer over the 90 days from the send, or from entering a flow: the report's decision window, when results are judged.
Range	Where the true value lies with 90% confidence, given the data.
Cohort	The customers whose first order fell in the same month.

Appendix

Data checks

What we checked in your files before the analysis.

Check	What we found
Orders without an email	6,114 of 76,911 orders (7.9%) have no email: 2,259 were matched to a customer by phone number, and the other 3,855 (5.0%) are left out of customer analyses.
Orders matched to Klaviyo profiles	Of 76,515 valid orders, 92.0% match a Klaviyo profile by email, 2.9% by phone number and 5.0% match none.
Shared phone numbers	70 phone numbers were seen with more than one email (for example a family, workplace or store number, or one person with two emails) and not used for matching.
Unreadable phone numbers	155 phone numbers in the orders could not be read as a full international number (country code, area code and number) and were not used.
Orders left out	Left out: 314 cancelled orders, 1 test, 81 unpaid or voided and 0 in another currency. 314 fully refunded orders count for revenue (usually $0) but not as orders; 786 were partly refunded.
Duplicates (warning)	1 exact duplicate row removed; 0 order numbers appeared in more than one version, and the version from the newest export was kept.
How net revenue is calculated	Net revenue = Subtotal - Refunded Amount: in 50 of the first 50 discounted orders, Subtotal already has the discount taken off, so it is not subtracted twice.
Data period	Orders run from 2025-04-01 to 2026-09-30 (18.0 months); analyses use the last 18 months.
Campaign recipients found in the orders	57.6% of campaign recipients have at least one order in the Shopify file.
Campaign and order periods	100.0% of campaigns were sent while the order data was running (2025-04-15 to 2026-06-25).
SMS left out	4 SMS campaigns (56,617 recipient rows) left out: Megovia measures email campaigns and flows only, and does not support SMS for now.
Holdouts	4,106 people held out at random from 2 campaigns and 1 flow; those results are measured, all others are estimates.
Loading note	6 Klaviyo times fell in the repeated hour when clocks went back and were read as daylight time.

From Shopify's total to the revenue in this report

Apr 1, 2025 to Sep 30, 2026, in USD.

Step	Orders	Amount
Shopify order total	76,911	$3,090,709.79
Taxes	71,985	−$158,490.84
Shipping	52,284	−$311,089.80
Refunds (up to each order's amount)	1,188	−$25,316.40
Orders linked to no customer	3,855	−$136,584.00
Other adjustments: test orders; orders not paid (pending, voided and the like); cancelled orders	396	−$10,059.90
Net revenue in the analyses	72,660	$2,449,168.85

Email campaigns sent in the period	Credited by your email tool	Measured lift, 90 days	Estimated lift, 90 days	Uncertain lift, 90 days	No final result at 90 days yet
Campaigns	36	2	20	5	9
Amount	$213,396.29	$36,340.09	$166,899.12	$16,781.30	

Your email tool credits a campaign with orders placed within 5 days by recipients who opened or clicked it, at the full order total with tax and shipping and before refunds; Megovia counts only the extra net revenue the campaign caused over 90 days, against a holdout or similar customers, so the two answer different questions.