



Centralize, Personalize, & Maximize: A Marketer's Guide to Turning Data Into Dollars



How to leverage your owned data to tailor
marketing campaigns that win.

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Introduction

Brands face the constant challenge of optimizing their marketing spend while simultaneously enhancing customer engagement. The problem marketers face is once all that customer data is collected, what's the best way to use it? This comprehensive playbook offers a strategic framework for achieving marketer's goals by leveraging a brand's most valuable asset: its existing data. By meticulously analyzing and activating rich customer information, brands transcend generic advertising approaches and instead adopt a targeted, data-driven methodology.

80% of consumers are more likely to make a purchase when brands offer personalized experiences.

— **Epsilon**

By understanding customer nuances, brands can identify and engage their most valuable audiences — those most likely to convert, remain loyal, and drive long-term value. This targeted approach not only improves ROAS and reduces wasted spend, but also creates a foundation for sustainable, data-driven growth.



CHAPTER 1

Data Foundation & Preparation



Data is the backbone of effective marketing strategies. As privacy regulations tighten and consumer expectations for personalization rise, marketers must understand and leverage the full spectrum of data types. Each data type offers unique value, and together, they form the foundation for building robust, omnichannel campaigns that drive results across the customer journey. If you're already using Klaviyo, you know data is important — that's why you invested in a CDP!

A successful data-driven ad strategy starts with a solid foundation. That means knowing what customer data you're collecting, how it's structured, and where the gaps are. Let's break it down.

Types of Data

- **Zero-Party Data (0P)**

Data customers voluntarily share directly with a brand (e.g., preferences, interests, purchase intentions). Collected via quizzes, surveys, or preference centers, 0P's explicit, consensual nature is key for hyper-personalization and effective marketing.

- **First-Party Data (1P)**

Data a company collects directly from its customers/ audience via its own channels (website, purchases, emails, surveys, app, offline). Highly valuable, accurate, relevant, unique, and collected with consent, offering direct customer insights and privacy compliance.



According to the 2024 Acquia CX Trends Report, [93% of marketers believe collecting first-party data is more critical than ever for organizations.](#)



- **Second-Party Data (2P)**

Data collected by one company from its audience and shared with another, essentially someone else's first-party data. This sharing happens via direct partnership, data marketplace, or agreement. For example, a clothing brand sharing purchase history with a fashion magazine, an airline sharing frequent flyer data with a hotel, or a retailer providing access to their data for co-branded campaigns.

- **Third-Party Data (3P)**

Data collected by entities without a direct relationship with the individual, aggregated from various online sources, and sold/licensed for marketing/advertising. Examples include demographics, psychographics, and past purchases, often cookie-based. These take the form of lookalike audiences, enriching customer profiles for better ad personalization or running awareness campaigns to reach new demographics.

The Importance of Each Type of Data

Effective digital advertising uses zero-party (proactively shared preferences), first-party (direct customer data), second-party (partner-shared first-party data), and third-party (aggregated, purchased) data.

A multi-party data strategy creates a holistic customer view, enhanced personalization, improved targeting, optimized campaign performance, competitive advantage, and future-proofing against privacy changes. Integrating all data types is essential for stronger customer relationships.

Data Goldmine:

Smart strategies for collecting data

0P

Zero-party data is crucial for personalized marketing amid privacy concerns. Strategies for collection include:

- **Interactive Quizzes & Surveys**
Gather explicit preferences (e.g., product fit, communication frequency). Keep them concise, offer incentives, and integrate seamlessly.
- **Preference Centers**
Dedicated hubs where customers manage communication and share info (e.g., email frequency, content types, product interests, optional personal details). This reduces unsubscribes and enriches data.
- **Contests & Giveaways**
Require specific preference-based answers as entry. Ensure relevance and justify prize value.
- **On-Site Polls & Feedback Widgets**
Short, targeted questions on websites/apps (e.g., exit-intent, content feedback, product interest). Make these non-intrusive and real-time.
- **Interactive Tools & Calculators**
Provide value in exchange for input (e.g., fitness calculators, budget planners, shade finders).
- **Direct Questions in Email & SMS**
Ask explicit questions within communications (e.g., "Reply with your favorite color," click options, two-way SMS). This leads to immediate segmentation.
- **Post-Purchase Surveys & Reviews**
Gather data beyond satisfaction (e.g., purchase motivation, future interest, specific feature feedback).

Klaviyo Partners that help collect zero-party data:

jebbit

 Digioh

 OCTANE AI

 Okendo

 Typeform

1P

First-party data enhances customer relationships, personalization, and marketing optimization in today's privacy-focused landscape. Strategies for collection include:

Websites and App Interactions

- **Forms & Subscriptions**

Use forms for sign-ups and downloads, offering incentives.

- **Account Registration**

Encourage accounts to gather demographics, purchase history, and behavior.

Direct Customer Interactions

- **Customer Service**

Record customer information during interactions (issues, preferences, feedback).

- **Loyalty Programs**

Reward customers for engagement, gaining purchase history and preferences.

- **Surveys & Feedback**

Solicit feedback via post-purchase surveys, satisfaction surveys, and direct forms.

Keep in mind...

- **Transparency & Consent:**

Be clear about data collection, obtaining explicit consent.

- **Value exchange:**

Be clear about data collection, obtaining explicit consent.

- **Data Governance:**

Be clear about data collection, obtaining explicit consent.

- **Data Security:**

Prioritize data security and privacy.



Despite the volume, **US digital marketers report using only 47% of the first-party data they collect**, due to integration and strategic planning obstacles.

— **BCG**

Examples of first-party data you're likely already collecting:

Ecommerce Platform:

Orders, sizes, styles, etc.

Loyalty Platform:

Purchase frequency, AOV, etc.

Conversion Rate Optimization Tools:

Email addresses, phone numbers, etc.

Advertising Platform (Pixel Placement):

Website activity, conversions, etc.

Customer Service Platform:

Customer sentiment, contact reason, etc.



2P

Second-party data enriches customer profiles without direct collection. It's acquired through partnerships. Key collection strategies include:

- **Direct Partnerships**

Form alliances with non-competitive companies serving similar audiences. Consider data bartering, joint ventures, or using second-party data marketplaces.

- **CRM Data Sharing**

Integrate CRM systems for streamlined sharing of customer attributes and history, especially for B2B Account-Based Marketing (ABM).

- **Collaborative Advertising**

Share custom audience segments for targeted campaigns, create lookalike audiences, or collaborate on retargeting efforts.

! Reminder

Ensure partner's initial data collection was transparent and consensual. Comply with GDPR, CCPA, etc., use DPAs, anonymize/aggregate data, secure transfers, and define clear usage agreements.

3P

As noted above, third-party data is generally purchased. With AdRoll, US advertisers can target [2,000+ syndicated audiences from Experian](#), a 3P data provider. With access to this data, they can reach consumers with specific behaviors, demographics, interests, lifestyle, business, financials, life events, location, and purchase predictors.

The Data Power Play: Unifying zero-, first-, second-, and third-party data for maximum marketing impact

In a world where customer journeys are fragmented and attention spans fleeting, the secret to standout marketing isn't just collecting data — it's orchestrating zero-, first-, second-, and third-party data into a unified strategy. This fusion empowers brands to deliver hyper-personalized experiences to existing customers, discover new, high-value prospects who look just like them, and unlock new segments for growth. The true power lies not in using these data types in isolation, but in integrating them strategically.

- **Enriching First-Party with Zero and Third-Party**

You can use zero-party data to personalize experiences for your existing first-party customers, and then use third-party data to find new customers who resemble your most valuable ones.

- **Targeting and Personalization**

Zero-party data enables hyper-personalization. First-party data refines these efforts for your existing audience. Second-party data broadens your reach to similar audiences, and third-party data helps you discover entirely new segments.

- **Customer Journey Mapping**

Combining these data sources allows for a comprehensive view of the customer journey, from initial awareness (often driven by third-party data targeting) to conversion (optimized with first and zero-party data) and retention.

- **Strategic Decision Making**

A holistic data strategy empowers businesses to make more informed decisions about product development, marketing spend allocation, content creation, and customer service.

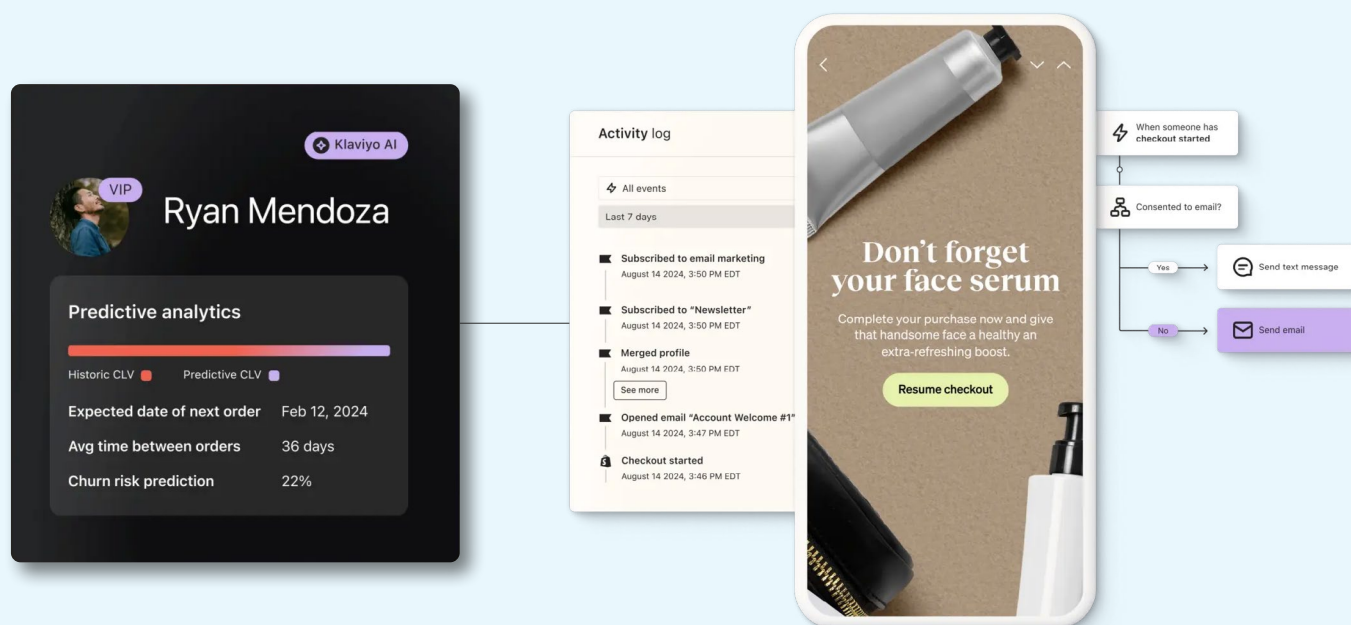


99% of marketers using a combined data approach report increased ROI or improved conversion rates from their campaigns.

— [Inbox Insight](#)



The importance of integrating all these data types into your marketing strategy cannot be overstated. For example, when 97% of first-time visitors don't purchase and over 88% of shoppers abandon their carts, combining first-party data from Klaviyo with third-party audience insights from AdRoll enables marketers to retarget and nurture leads more effectively.



By syncing customer lists and segments between Klaviyo and AdRoll, brands can dynamically target subscribers with personalized web, social, and CTV ads, reinforcing campaign messages and increasing the likelihood of conversion.



87% of marketers say data is their company's most under-utilized asset, indicating substantial opportunity for brands that effectively unify and activate data from various sources.





CHAPTER 2

Data Cleanliness & Hygiene

Data is a marketer's most valuable asset — but only if you can harness its full potential. Siloed spreadsheets and fragmented platforms are relics of the past; modern marketing demands a unified data hub where every customer interaction, touchpoint, and insight is accessible in real time. Managing your data in one place isn't just about convenience, it's the foundation for smarter decision-making, more effective campaigns, and measurable business growth.

Implementing a CRM, like Klaviyo, is critical for D2C marketers aiming to unlock this potential.

The ideal platform doesn't just store contacts; it centralizes behavioral, transactional, and engagement data, supports seamless integrations with your existing tech stack, and empowers your team to act on insights instantly.

Not ready to act just yet? No problem. With Klaviyo, you own your customer data — so you can organize, analyze, and activate it on your own timeline, whenever you're ready to take the next step.

However, centralizing your data is only the beginning. The real magic

happens in how you organize and segment it.

Smart segmentation transforms raw numbers into revenue by delivering the right message, to the right person, at the right time.

Whether you're personalizing product recommendations, optimizing campaign timing, or mapping the entire customer journey, organized data is your ticket to measurable growth and lasting loyalty.

Of course, with great data comes great responsibility. As privacy regulations tighten and consumers grow savvier about their digital footprints, ensuring your data remains privacy compliant is non-negotiable. The most successful brands are those that treat privacy as a core value — not an afterthought — embedding compliance into every process, platform, and campaign.

This chapter will show you how to build a unified data foundation, choose the right tools, and turn your data into a growth engine, all while keeping your customers' trust front and center.

Data Hygiene Essentials: Keeping Your CRM Clean, Consistent, and Campaign-Ready

Regularly cleaning your audience lists — across email, SMS, and other channels — is key to maintaining strong deliverability, higher engagement, and better customer experiences. By removing unengaged contacts, you ensure your messages reach the people most likely to respond, improving performance metrics while protecting your sender reputation. A clean, active list helps you personalize content, reduce opt-outs and spam complaints, and build stronger, more relevant connections across every touchpoint.

To get the most out of your audience (and ensure every message hits the mark) you need to start with clean, reliable data. Here are a few key steps to audit and maintain your contact lists across channels:

- **Audit Your Data**

Regularly review your CRM for duplicate records, incomplete entries, outdated information, and inconsistencies.

- **Standardize Formats**

Ensure all data (e.g., addresses, phone numbers, job titles) follows a consistent format for seamless integration with ad platforms.

- **Remove Redundancy**

Merge or remove duplicate customer profiles.

- **Implement Data Validation**

Set up rules within your CRM to prevent the entry of bad data going forward, ensuring reliable ad targeting.

Supercharge Your CRM: Enrich, Integrate, and Unify Your Customer Data for Smarter Ad Targeting

Targeting

A CRM is only as powerful as the data behind it. To build high-performing ad campaigns, you need more than just names and emails — you need context. By enriching your CRM with both internal and external data, and integrating it with the rest of your tech stack, you unlock a unified customer view that powers more precise, effective targeting across every channel.

- **Internal Enrichment**

Supplement basic contact information with internal data points like purchase history, website interactions, customer service tickets, product usage, and engagement with previous campaigns.

- **External Enrichment**

Consider integrating third-party data sources (e.g., firmographics, technographics, demographic data) to gain a more holistic view of your customers and prospects, enhancing your ability to create precise ad segments.

- **Integrate Systems**

Connect your CRM with other relevant platforms (e.g., marketing automation, sales platforms, customer support, and importantly, ad platforms) to create a unified customer view, allowing for seamless data flow for ad targeting

Segmentation Strategies: Building Smarter Audiences for Targeted and High-Value Campaigns

Effective ad targeting starts with thoughtful segmentation. By organizing your audience based on attributes, behaviors, and customer value, you can create more relevant, high-performing campaigns. Whether you're retargeting active buyers or building lookalike audiences based on your best customers, smart segmentation ensures you're reaching the right people with the right message.

- **Initial Segmentation**

Group your existing customers based on basic attributes (e.g., industry, company size, revenue, geographic location). These initial segments form the basis for ad targeting.

- **Behavioral Segmentation**

Segment based on actions and interactions (e.g., purchase frequency, average order value, engagement with marketing campaigns, website activity, cart abandonment, content viewed). These segments are crucial for retargeting and personalized ad experiences.

- **Value-Based Segmentation**

Identify your most valuable customers (e.g., high lifetime value, frequent purchasers, brand advocates). These segments are ideal for creating lookalike audiences for new customer acquisition.

By prioritizing data hygiene, enrichment, and strategic segmentation, you're not just cleaning up your CRM, you're laying the groundwork for truly impactful marketing. When your data is accurate, enriched, and intelligently segmented, every campaign becomes sharper, every message more relevant, and every dollar spent more efficient.

Remember, the brands winning in today's D2C marketplace are those who treat data as a living asset — constantly maintained, enriched, and leveraged for growth. As you move forward, make data quality and integration a core part of your marketing DNA. With the right systems and processes in place, you can transform your CRM from simply a database into a powerful engine for customer insight, campaign precision, and sustainable business success.



RMS Beauty achieves 7–9x ROI with the AdRoll and Klaviyo Integration.

Solutions:

Klaviyo
Integration

Product
Recommendations

Product
Recommendations

Audience
Segmentation

Retargeting

“We needed full control of our strategies throughout the customer journey and to see how customers were perceiving us at every touchpoint.”



Alejandra Tenorio

Senior Director of Digital Marketing
+ eCommerce at RMS Beauty





CHAPTER 3

Activating Data to Drive ROI



Activating your data is where strategy turns into measurable results. With the global D2C e-commerce market projected to soar to [\\$595 billion by 2033](#), brands that master data-driven activation are set to capture the lion's share of growth. But with ad costs on platforms like [Google Ads increasing by 10% year over year](#), customer acquisition costs are following suit, making data efficiency and precision a non-negotiable.

Data activation at the top of the funnel is fueling new customer acquisition in a fiercely competitive environment. Brands that leverage dynamic content and tailored recommendations are seeing a 30% increase in engagement and a 25% boost in conversion rates, while [personalized email campaigns deliver a 20% improvement in open rates](#).

As prospects move through the funnel, AI-powered segmentation and predictive analytics allow marketers to nurture leads with pinpoint accuracy, optimizing every touchpoint. At the bottom of the funnel, granular behavioral data and dynamic retargeting can turn cart abandoners into loyal customers. This is vital in a market where retention is as important as acquisition.

In this chapter, you'll learn how to put your unified data to work across every stage of the funnel, using proven strategies and the latest analytics to drive real business results. The brands winning in 2025 are those who activate their data intelligently — transforming insights into action, and action into sustainable growth.



Businesses using data-driven strategies achieve five to eight times higher ROI compared to those that do not, highlighting the value of integrating diverse data sources for campaign optimization.

— [Invesp](#)

Top of Funnel Strategies: Building your pipeline

At the initial customer journey stages, data activation targets potential customers who are most receptive. Strategic data activation at the top of the funnel builds an efficient path to new customer acquisition.

- **Leveraging Lookalike Audiences**

Create lookalike audiences based on existing high-value customers (purchasers, email subscribers, engaged website visitors). Utilize diverse first-party data like website visitor, customer, email subscriber, and app user data. Segment audiences for tailored ads.

- **Strategic Prospecting with Third-Party Data (where applicable and ethical)**

Augment efforts with carefully selected third-party data for broader reach, ensuring privacy compliance. Examples include targeting based on interests, professional affiliations, or life events.

- **Content Marketing and Value Proposition at the Top of the Funnel**

Focus on brand recognition and trust, not immediate conversions. Use data to create informative content (blog posts, infographics, guides, “hero” videos). A/B test ad creative, highlighting benefits, using strong visuals, and clear CTAs like “Learn More.”

- **Channel Selection and Budget Allocation**

Diversify across social media, Google Display Network, YouTube, and programmatic advertising. Allocate significant budget to top-funnel activities, monitoring impressions, reach, brand lift, and website visits for effectiveness.

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Diversify across social media, Google Display Network, YouTube, and programmatic advertising. Allocate significant budget to top-funnel activities, monitoring impressions, reach, brand lift, and website visits for effectiveness.

Middle of Funnel Strategies: Turning awareness into interest

To truly maximize the impact of your advertising efforts, you'll need to move beyond basic top-of-funnel awareness campaigns and strategically leverage your data for mid-funnel advertising. This focuses on nurturing prospects who have already shown some level of interest in your brand, guiding them closer to conversion.

Here's a few examples of how to effectively utilize your data for powerful mid-funnel advertising strategies:

Target Website Visitors (Non-Converters)

These are individuals who have explored your website but haven't made a purchase or completed a desired action. Segment them further based on pages visited (e.g., product pages, pricing pages, blog posts) and time spent on site.

- **Dynamic Product Ads (DPAs)**
Showcase the exact products they viewed or similar items.
- **Value Proposition Reinforcement**
Highlight key benefits, unique selling points, or solutions to common pain points that might have initially attracted them.
- **Social Proof**
Feature testimonials or reviews related to products they showed interest in.
- **Educational Content**
If they viewed blog posts, offer related valuable content that can deepen their understanding and trust.

Engage Email Subscribers (Non-Purchasers)

Individuals who have opted into your email list but haven't yet become paying customers. Analyze their email engagement (opens, clicks) to identify their interests.

- **Curated Content**
Share your best-performing blog posts, guides, or videos relevant to their interests.
- **Product Spotlights**
Feature new or trending products that align with their past engagement.
- **Highlight Exclusive Offers**
Remind them of any subscriber-only benefits.

Engage Past Purchasers (for cross-sell/upsell)

While technically post-conversion, these customers can be targeted for mid-funnel strategies related to:

- **Complimentary Products**
- **Higher-tier offerings**
- **Repeat Purchases**

Consider retargeting campaigns for this audience.

Bottom of Funnel Strategies: Turning interest into action

Leveraging customer data is crucial for crafting highly effective bottom-funnel advertising strategies. By deeply understanding customer behavior, preferences, and journey stages, businesses can deliver hyper-targeted messages that resonate and drive conversions. This approach moves beyond broad demographics to precise audience segmentation, ultimately leading to a more efficient allocation of advertising spend and a higher return on investment.

Here are key ideas on how to utilize customer data to optimize bottom-funnel advertising:

Granular Customer Segmentation:

- **Leverage Purchase History**

Segment customers based on products previously purchased, purchase frequency, average order value (AOV), and recent purchase dates. This allows for tailored cross-selling and upselling campaigns. For example, customers who bought a specific product could be targeted with complementary accessories or upgraded versions.

- **Use Browsing Behavior**

Analyze website visits, pages viewed, products added to cart (but not purchased), and time spent on site. This data is invaluable for retargeting campaigns, reminding potential customers of items they showed interest in or offering incentives to complete a purchase.

- **Consider Engagement Levels**

Categorize customers by their interaction with your brand across various channels, including email open rates, click-through rates, social media engagement, and app usage. Highly engaged users might respond well to loyalty programs or exclusive offers, while less engaged users might need stronger re-engagement tactics.

Dynamic Retargeting Campaigns:

- **Cart Abandonment**

Implement sophisticated retargeting ads and email sequences for users who abandoned their shopping carts. These should feature the exact products left behind, potentially with an added incentive like free shipping or a small discount to encourage completion.

- **Post-Purchase Engagement**

After a purchase, use data to suggest related products for future needs, solicit reviews, or offer loyalty program enrollment. This deepens customer relationships and encourages repeat business.

Dynamic Retargeting Campaigns:

- **Exclusive Discounts**

Offer personalized discounts based on a customer's AOV, purchase history, or loyalty status. For example, a high-value customer might receive a larger discount than a first-time buyer.

- **Bundle Deals**

Create customized product bundles based on previous purchases or browsing patterns.

- **Urgency and Scarcity**

Use data to identify products a customer is highly likely to purchase and then introduce time-sensitive offers or limited stock notifications to create urgency.

A full-funnel perspective

To fully unlock the value of your customer data, you need a strategy that spans your entire marketing funnel and every channel your customers engage with. [Omnichannel activation](#) ensures your messaging stays consistent, personalized, and impactful — no matter where your audience encounters your brand.

A few key tactics to build an integrated, high-performing strategy include:

- **Social Media Advertising**

Use data to segment custom audiences on platforms like Facebook, Instagram, LinkedIn, and TikTok to reach existing customers or similar profiles with highly relevant ads.

- **Programmatic Advertising**

Use data to inform your programmatic ad buys (display, video, native), ensuring your ads are shown to the most relevant audience across the web.

- **Connected TV (CTV) Advertising**

Leverage segments to target specific households or demographic groups with CTV ads, expanding your reach beyond traditional digital channels.

- **Search Engine Marketing (SEM)**

While not direct targeting, insights from your data can inform keyword strategy and ad copy for search campaigns, especially for high-value customer segments.

- **Retargeting Campaigns**

Create highly effective retargeting campaigns using customer data to re-engage website visitors or past customers who haven't converted or have shown specific interest.

- **Email and SMS**

Don't forget your owned channels. Email and SMS are critical to reinforcing ad messaging and continuing the conversation post-click with personalized follow-ups, promotions, and content.

Activating your data is the linchpin for turning marketing strategy into measurable business growth. The most successful D2C marketers are those who don't just collect data, but activate it across every stage of the funnel. By unifying your data, adopting proven activation strategies, and leveraging the latest analytics, you can ensure every campaign is smarter, every dollar is better spent, and every customer relationship is stronger. This is the foundation for sustainable growth and a true competitive edge in 2025 and beyond.

CHAPTER 4

Measurement & Optimization for Your Full Funnel Approach



Data-driven optimization is the backbone of high-performing marketing strategies. With B2C marketers now using an average of five channels to engage customers across email, SMS, social, and digital advertising, the complexity of cross-channel campaigns has never been greater. But the payoff for mastering this complexity is substantial: [Omnichannel strategies can boost customer retention by 89% and increase purchase rates by 287%](#). Yet, only 8% of businesses have truly mastered omnichannel execution, and [just 12% have the right technology in place to support it](#). And the key to an omnichannel full-funnel approach...starts with measurement.

Klaviyo stands out for its robust reporting and analytics capabilities, offering marketers a unified dashboard for tracking customer journeys, campaign performance, and audience segmentation in real time. This empowers brands to make data-backed decisions, optimize messaging, and drive higher ROI from every touchpoint. Meanwhile, AdRoll's Cross-Channel Attribution (CCA) solution enables marketers to measure the true impact of their campaigns across web, social, email, and display, providing a comprehensive view of performance and helping to eliminate wasted spend.

Continuous monitoring and refinement are crucial for long-term ad campaign success. Understanding the impact of your full-funnel strategy will allow you to leverage data more efficiently, reach the right audience, and spend consciously. In this section, we'll break down the key reporting metrics and audience insights you should be collecting to optimize your omnichannel strategy, and show how platforms like Klaviyo and AdRoll can help you own your data, unlock deeper insights, and drive measurable growth.

Key Performance Indicators (KPIs) to Track

- **Return on Ad Spend (ROAS)**

The revenue generated for every dollar spent on advertising.

- **Conversion Rates**

How effectively your targeted ad campaigns convert prospects into customers.

- **Customer Acquisition Cost (CAC)**

The cost of acquiring new customers through your targeted ad efforts.

- **Ad Engagement Rates**

Click-through rates (CTR), video completion rates, and other interaction metrics for your ad creatives.

- **Customer Lifetime Value (CLTV)**

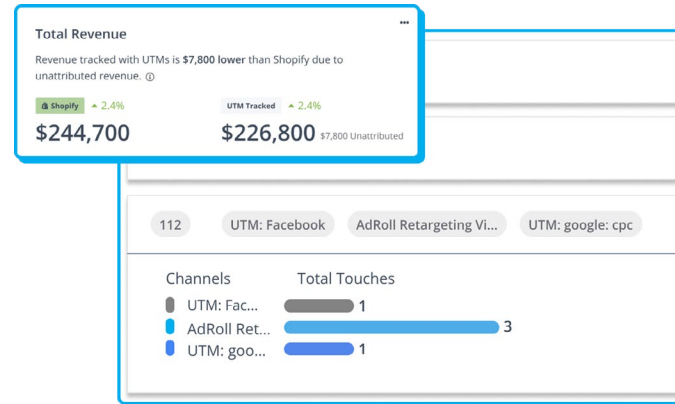
The long-term value generated by customers acquired through these ad strategies.

- **Cross-Channel Attribution (CCA)**

How different ad channels contribute to conversions across the customer journey.

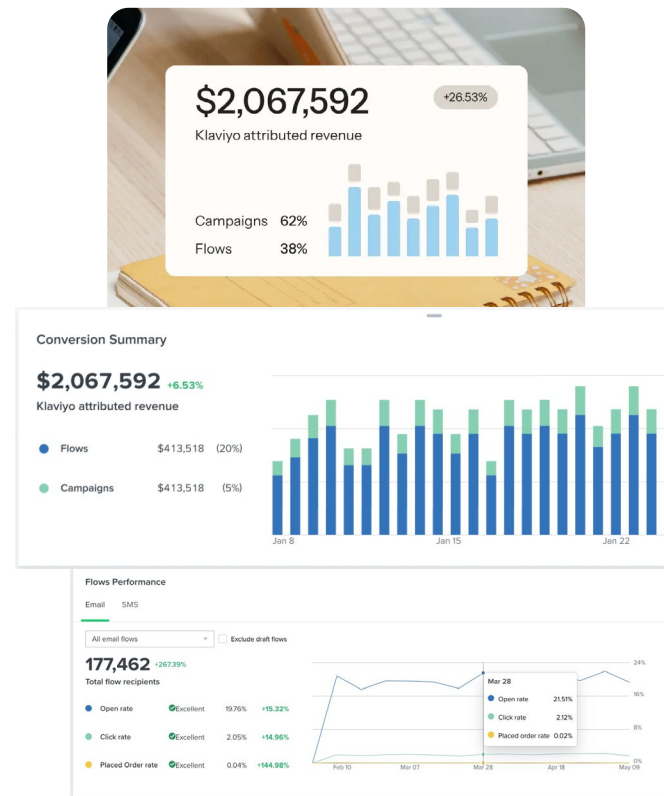
Get more from your marketing spend with AdRoll Cross-Channel Attribution

Identify and prioritize investments in channels, campaigns, and journeys that generate the most conversions and highest revenue. At the same time, un-silo your marketing stack, gain a more holistic view of your strategy, and optimize your marketing spend with AdRoll.



Get smarter, faster with Klaviyo's Marketing Analytics

Track, analyze, and optimize every step of your customer journey all in one place. Klaviyo's real-time reporting gives you a unified view of performance across email, SMS, forms, and automation flows, helping you identify what's working, spot opportunities, and make data-driven decisions that drive growth. With deep segmentation insights and customizable dashboards, Klaviyo empowers marketers to measure impact across the entire funnel and across every channel — without needing a data team.





CHAPTER 5

Turn Data Into Dollars: Practical Plays for D2C Marketers

Activating your existing data isn't just a reporting exercise, it's the key to driving real, measurable business impact right now. With most D2C brands using only a fraction of their first-party data, the real opportunity lies in putting existing insights to work through targeted, actionable campaigns. Whether it's rewarding your most loyal customers, rescuing abandoned carts, or expanding your reach with lookalike and retargeting audiences, these strategies leverage the power of your CRM to drive revenue, boost retention, and create the hyper-personalized experiences today's consumers demand.

1 Reward Loyalty With Targeted Discounts

Your CRM is rich with purchase history and engagement data. Use it to identify your most loyal customers — those with high lifetime value or frequent repeat purchases — and deliver exclusive, personalized discounts or early access to new products. This not only drives repeat business, but also strengthens brand advocacy. In 2025, D2C leaders are using AI-powered segmentation to tailor offers at scale, creating hyper-personalized experiences that boost retention and customer lifetime value.

2 Rescue Revenue With Cart Abandonment Campaigns

With over 88% of online shoppers abandoning their carts, automated cart abandonment flows are a must-have. Leverage behavioral data to trigger timely, personalized reminders via email, SMS, or retargeting ads. Incorporate dynamic content — such as images or videos of the abandoned products, urgency messaging, or small incentives — to nudge shoppers back to checkout. Brands that optimize these flows see up to a 25% lift in conversion rates and a measurable reduction in lost revenue.

3 Fill Your Funnel With Lookalike and Retargeting Audiences

Your existing customer and subscriber lists are the foundation for efficient acquisition. Sync first-party data from Klaviyo with platforms like AdRoll to build lookalike audiences and retarget high-intent visitors across channels. This approach expands reach to new prospects who resemble your best customers, while also re-engaging warm leads who haven't yet converted.

The Bottom Line

You don't need more data — you need to do more with the data you already have. By activating your existing assets through loyalty rewards, cart recovery, and smart audience targeting, you'll unlock untapped revenue, maximize ROI, and deliver the personalized experiences today's consumers expect. The brands that operationalize these tactics (and continuously refine them using unified platforms like Klaviyo and AdRoll) will outpace the competition.



Pro Tip:

Don't overlook the power of segmentation for cross-selling and upselling. Analyze purchase patterns and engagement signals to surface relevant product recommendations or bundle offers for past buyers. This will drive incremental revenue without additional acquisition costs.



Tools & Technologies

While this playbook focuses on strategy, the right tools can significantly streamline the process. Learn more about AdRoll, Klaviyo, and how the power of both can increase your full-funnel, data-rich strategies.

AdRoll is an advertising platform that helps businesses run, measure, and optimize multi-channel, full funnel campaigns. Powered by industry-leading AI and automation, the AdRoll platform leverages data foundations to design, deliver, and optimize campaigns that drive customer engagement, boost website traffic, and increase revenue. AdRoll helps customers generate more than \$246 billion in revenue annually and has been used by over 120,000 brands since 2006. AdRoll is headquartered in San Francisco and is a division of NextRoll, Inc.

GET IN TOUCH
WITH ADROLL

Klaviyo (NYSE: KVYO) is the only CRM built for B2C brands. Powered by its built-in data platform and AI insights, Klaviyo combines marketing automation, analytics, and customer service into one unified solution, making it easy for businesses to know their customers and grow faster. Klaviyo (CLAY-vee-oh) helps relationship-driven brands like Mattel, Glossier, Core Power Yoga, Daily Harvest and 169,000+ others deliver 1:1 experiences at scale, improve efficiency, and drive revenue.

GET IN TOUCH
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Conclusion

Leveraging your CRM data for ad targeting is not a one-time project, but an ongoing process. By systematically cleaning, enriching, segmenting, and analyzing their customer data, mid-market brands can unlock powerful insights to identify their ideal audience with precision. This enables highly personalized and effective advertising strategies across an omnichannel footprint, leading to improved ad ROI, stronger customer relationships, and sustainable business growth.

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