THE UNIFIED RETENTION SYSTEM

The Retention Playbook.

The actual system we use to add 10–25% revenue for D2C brands — on email, WhatsApp & SMS.

Not theory. This is the working playbook our team runs every day — how we set objectives, build the flows, segment the list, plan the calendar, and prove growth that shows up on the bottom line.

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₹47 Cr+	100+	10–15×
EXTRA REVENUE DRIVEN	D2C BRANDS	RETURN ON RETENTION SPEND

A PLAYBOOK BY KLICK · MAKEITKLICK.COM

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Why retention is a different game.

Acquisition is simple to read: you spend on ads, you get revenue back at a certain ROAS. Retention is more layered — and that's exactly where the unfair advantage hides.

The holy-grail metric is **revenue from returning customers** and the **number of returning customers**. But a retention team doesn't fully control that number — it depends on the brand, the acquisition engine, the season, and how badly people want to buy again.

So we don't chase a vanity figure. We establish your baseline returning-customer rate first, then drive deliberate, measurable increments on top of it. For brands that have never invested in retention, even small efforts move the needle fast. For everyone else, there's always a slice of customers who return on their own — our job is to grow that slice on purpose.

> *We never guess. Before any flow or campaign, we ask the right questions — more persuasion, or more story? New sends, or repurpose what worked? The strategy comes from the questions, not the assumptions.*

The five levers we actually pull

WHERE CRM MOVES THE BOTTOM LINE

1. Get prospects to place their **first** order.
2. Get a newly acquired customer to place their **second** order quickly.
3. Get the old, inactive customer to come back for their next order.
4. Get 2×+ customers to place **more** orders.
5. Reduce churn — after first defining what churn even means for the brand — and lift repeat AOV.

Pick objectives you can actually move.

Not every objective is created equal. Some are easy to measure and easy to shift; others matter enormously but take a full quarter to bend. We choose deliberately, based on business impact and how realistically we can move it in the first three months.

OBJECTIVE	MEASURABILITY	BUSINESS IMPACT	EASE OF ACHIEVING
Improve repeat-customer rate (next 3 months)	Easy	High	Hard
Increase CLTV (next 3 months)	Very hard	High	Very hard
Reduce time between orders	Very hard	High	Hard
Higher revenue from the CRM channel	Easy	Medium	Easy
Individual segment growth	Easy	Medium	Very hard

Achievable objectives we set

1. Capture leads and convert them into first-time customers.
2. Bring old / dormant customers back to order again.
3. Increase the number — and the speed — of customers coming back.
4. Lift Add-to-Cart → Checkout → Purchase conversion.
5. Increase reorder AOV.

Before us vs. after us.

Retention only counts if you can show the line moved. These are the owned CRM metrics we benchmark on day one and grow on purpose.

The metrics that should climb once we're in

- **Post-purchase conversions** — once a customer enters our post-purchase flows, what % come back and reorder (shown via M0 / M1 repeat cohorts). This goes up after the flows are live.
- **Win-back success rate** — define the win-back segment (default: 90 days), then track orders and revenue recovered through that flow.
- **Re-engagement rate** — subscribers who engaged, went quiet, then re-engaged after we came on board.
- **Churn reduction** — e.g. 30% of pre-2024 customers never reordered; how do we pull that to 20%?
- **Key segment growth** — VIPs and 2×+ customers.
- **Sales ROI** — retention revenue generated against spend.

Note the "before" numbers the day you onboard

1. Average M0 and M1 repeats.
2. % of customers older than 90, 120 and 180 days who haven't ordered recently.
3. 1+ → 2+ → 3+ customer growth across 30, 60 and 90 days.
4. Average returning orders per month and per quarter.

> *Long-term growth (visible over a quarter): M0/M1/M2 repeats from the day flows go live, conversion-funnel improvement across ATC → Checkout → Purchase, and rising conversion rates on the abandonment flows themselves.*

A six-step KPI framework.

They matter to your goal, we can move them, and we prove the business impact with monthly updates and a long-term roadmap.

STEP	WHAT WE DO
1. Business goals	Identify the 1–3 priorities for the next 6–12 months: more repeat purchases, shorter time between purchases, less churn of high-value customers.
2. Levers under control	“More repeat customers” isn't fully ours to control. What is: win-back rate of lapsed users, post-purchase conversions from flows, conversion rate of abandonment & cross-sell flows.
3. Short & long-term gains	**Monthly:** high-ROI campaign sales, win-back conversions, abandoned-cart recoveries. **Quarterly:** M0/M1/M2 repeats, churn reduction among at-risk customers, VIP segment growth.
4. Core KPIs	Choose 2–3 headline KPIs for the monthly report (incremental revenue from returning customers, flow conversion rate, prospect conversions). Track supporting metrics — opens, CTRs — but they're not headlines.
5. KPI roadmap	Where we stand (e.g. VIPs = 5% of customers) → target (8% in 3–6 months) → levers (the flows & campaigns to get there) → monthly checkpoints.
6. Story of impact	Report a narrative, not a wall of metrics: our key KPIs and where they stand, what's driving the change, and what's next.

The core flows — and what each is for.

Automations are brand communication triggered by a customer's behaviour — a signup, an abandoned checkout, an order placed. Their job is to carry the right message across the whole journey, from the first signup to a loyal repeat buyer.

FLOW	TRIGGERED WHEN	WHAT IT DOES	REVENUE
Welcome	A new lead joins the list	Delivers the offer, then builds trust and reasons to make a first purchase.	HIGH
Browse abandonment	Viewed a product, didn't add to cart	A gentle nudge that the product they viewed is genuinely loved, plus trust-building content.	MEDIUM
Collection abandonment	Viewed a collection, didn't add to cart	Same nudge, personalised to bestselling collections so the content is specific to what they browsed.	MEDIUM
Cart abandonment	Added to cart, didn't check out	For people who know the brand a little more than a checkout-abandoner — room to experiment with messaging.	MEDIUM
Checkout abandonment	Started checkout, didn't buy	Reminder that products are waiting, then trust + FOMO + time-limited offers. Branch by new vs. existing customer and by bestseller for higher conversion.	HIGH
Order confirmation & shipping	An order is placed	Confirms what they bought and that it's on the way, then shipping/tracking. Highest open rates of any flow — great for building anticipation, social follows, and quick upsells.	MEDIUM
Cross-sell	After the product is delivered	“You bought this, you may like this.” Drives category exploration — complementary product, bundle, or otherwise. Needs deep catalogue understanding.	MEDIUM
Up-sell	After order placed / delivered	Bought one tee? Offer a 3-pack at a no-brainer price to lift AOV immediately. Implementation shifts a lot by category.	MEDIUM
Feedback	After product is delivered	Ask how they feel, nudge a review (free or incentivised). Can be coupled with cross-sell — a happy shirt buyer becomes a pants prospect.	LOW
Loyalty	After order placed / delivered	Reward regulars with points, referrals and loyal-customer activity to keep them purchasing.	MEDIUM

These are the core flows — some brands skip a few, others need extras. It's all about automated communication at every important touchpoint. When you strategise a flow, think angles of communication, which offers fit which stage, and the time delays between messages.

Segment by behaviour, not by guesswork.

A good calendar keeps the list engaged, hits the month's objectives and stays top-of-mind without spamming. The starting point is **RFM** — cohorts by Recency, Frequency and Monetary value. Flex those three and you can describe almost any behaviour.

SEGMENT	DEFINITION	WHEN TO USE
Active on site KL · AOS 30D	Active on site in the last 30 days (extend to 60/90D for size). Shoppers → explorers.	New launches, sale events.
Engaged prospects KL · Prospects 30D	Joined the list in last 30 days AND ordered zero times. Offer hunters who finished the welcome flow but never bought.	Most sale events with an offer at or above the welcome offer.
Engaged customers KL · Engaged 30D	Ordered ≥ once in lifetime AND clicked WA / Email / SMS at least once in 30 days. The ideal customer — bought and still engaging.	Sale events with new launches & offers.
Recent customer KL · Recent 30D	Ordered in the last 30 days. Cash multipliers — highest chance of buying again.	New launches, product spotlights, cross-sells.
Win-back KL · Winback 90D	Ordered ≥ once in lifetime AND ordered zero times in last 90 days. Almost gone — high chance they stop buying.	Philanthropic campaigns, new launches, mega events.
VIP customer KL · VIP	Ordered 3×, or spent ≥ 3× AOV (tune 3-5 for segment size). Loyalists — no persuasion needed.	Perks, secret launches, early access, surveys.
Exclusions KL · Last 7 Day	Ordered in last 7 days (tune to shipping time). Still waiting on their order — exclude to avoid cancellations.	Exclude from all campaigns except very important ones.
WA / Email unengagers KL · Unengagers	Received ≥ 3 messages in lifetime AND opened/clicked zero times. No interest shown.	Exclude from all campaigns except win-back.
SMS bounced KL · SMS Bounced	Bounced SMS more than once. Unreachable — skip to save cost.	Suppress to control spend.
Active in flows KL · AC Flow Active	Currently moving through an automation (abandoned checkout, welcome, etc.). In progress — don't disrupt the flow.	Skip for campaigns except announcements worth disrupting a flow for.

Identifying the key segments for a brand is everything — roughly 90% of performance is driven by them. Build more as needed around products purchased, ATC interest, or products viewed: lapsed customers, high-value, high-frequency, and discount buyers are all worth their own cohort.

06 — THE CALENDAR

Build the calendar, then allocate resource.

Start every calendar with the **immovables** — campaigns tied to fixed dates like new launches and site-wide offers. Of a typical 8–12 campaigns a month, immovables are usually 3–4 at most. The rest are CRM-specific and built to push the month's objective.

Flows vs. campaigns

Flows do the heavy lifting on your **quarterly** objectives; campaigns mostly serve the **monthly** ones. Both keep the list warm — the split between them is where resource planning matters.

Be deliberate about resource

Say a client's plan is 10 emails + 10 WhatsApps a month — that has to be split carefully between flows and campaigns. Some brands want automations fully built before going hard on campaigns; others want more campaigns up front. Get that input first, then allocate — while making sure the monthly and quarterly objectives still get met.

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07 — PROOF OF GROWTH

Make the growth visible.

Attributed revenue never tells the full story. Our success is tied to how these channels move business growth — so we plan the calendar so results are visible.

- **Shopify cohorts** — track month-on-month growth using the cohort report; watch how flow & campaign touchpoints affect buyers acquired in the last month.
- **Lapsed reactivation** — build a segment of lapsed customers to nurture back; the count returning from that cohort is easy to track.
- **Crucial-flow conversion** — lift conversion on abandoned-checkout, cart, browse, welcome and post-purchase flows by extending them and improving the content.
- **Key segment growth** — growth of the core segments translates directly into business growth.

YOUR MOVE

Want this run on your store?

Book a free 30-minute audit. We'll run a 31-point retention diagnostic across your email, WhatsApp & SMS — and hand you three specific fixes to ship this week, plus a prioritised 90-day roadmap.

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30-MIN AUDIT CALL

3 QUICK WINS TO SHIP THIS WEEK

90-DAY PRIORITISED ROADMAP