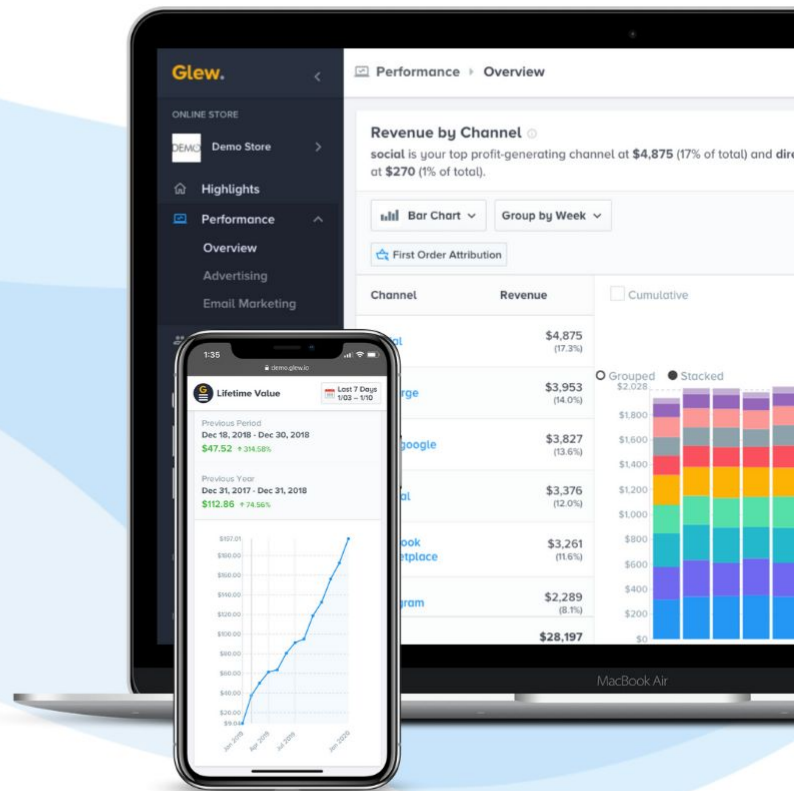


# Glew University

## Customer Segments

→ May 18th  
→ 4pm EST

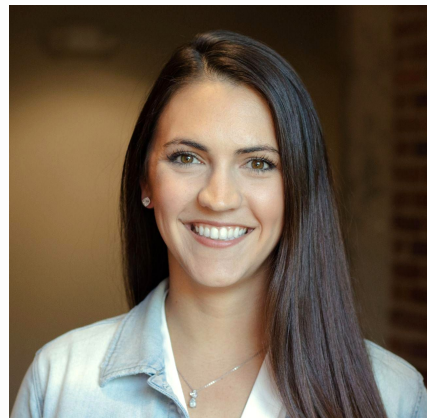
Glew.



# Introductions



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# What we'll cover:

1. Customer segmentation in Glew, and which customer segments you should be looking at
2. How to create custom segments
3. How to use segmentation for marketing (including automatic segment sync with Mailchimp and Klaviyo)
4. How customer segmentation provides insights about your customers, their buying behavior and their demographics that help you drive growth

# Customer Segments

What is *customer segmentation*?

Customer segmentation **enables you to group together customers who have similar characteristics into a customer segment.**

With over 180 data sources in Glew...you have over X number of filters, operators, and values, to build a customer segment. While there are **31 Predefined Segments** in Glew Pro, you can also build out **unlimited Custom Segments** from over **100 different filter options.**

This gives you the instant power to have segments that are as broad or as narrow as you need.

**Let's take a look!**

# Glew's Predefined Segments

## List View

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ONLINE STORE

Glew Operations

Shopify

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Customer Segments

Predefined Segments

List

Search Segments

Create Segment

All visible - None pinned

Segment Name	Category	Description
Abandoned Cart	Purchase History	Customers who have added items to a cart but exited without completing the purchase.
Account Marketing	Customer Status	Customers who are flagged as "account marketing" in your ecommerce or email marketing platform.
Active	Customer Status	Customers whose last purchase is within 80% of your store's lapse point (the number of days that can pass before a customer is less likely to make a repeat purchase). If your lapse point is 100 days, anyone who has purchased within the last 80 days is considered active.
All Customers		All customers with an account who have purchased from you.
At Risk	Customer Status	Customers whose last purchase is within 20% of your store's lapse point (the number of days that can pass before a customer is less likely to make a repeat purchase). If your lapse point is 100 days, anyone whose last purchase is more than 80 days ago is considered at risk.
Big Spenders	Purchase History	Customers whose average order value is in the top 10% of all your customers.
First Purchase	Purchase History	Customers whose first purchase is in the date range selected. (Note: Customers in this segment may have made subsequent purchases in the date range, but their first purchase must have occurred in the date range selected.)
Full Price Customers	Purchase History	Customers who have never used a discount code.
High AOV	Purchase History	Customers with an average order value in the top 10% of all your customers.
Last	Customer Status	Customers whose last purchase has surpassed your store's lapse point (the number of days that can pass before a customer is less likely to make a repeat purchase). If your lapse point is 100 days, anyone whose last purchase is more than 100 days ago is considered last.
Low AOV	Purchase History	Customers with an average order value in the bottom 10% of all your customers.
Loyalty Lion Customers	Loyalty	Customers enrolled in your Loyalty Lion program in the date range selected.
Most Active Customers	Purchase History	Customers whose total number of orders is in the top 10% of all your customers.
Most Profitable	Purchase History	Customers who are in the top 10% of all your customers by profit.
Multi-Purchase Customers (Lifetime)	Lifetime	Customers who have purchased from you two or more times over their lifetime as a customer.
Multi-Purchase Customers in The Last 12 Months	Interval-Based	Customers who have made two or more purchases in the last 365 days (end date includes today).
Never Purchased	Lifetime	Customers who have created an account with your store but have never made a purchase. This includes customers who started an order but abandoned their cart before checking out.
One Purchase Customers	Purchase History	Customers who have only purchased from you once in the date range selected. (Note: They may have made additional purchases outside of this date range, but they can only have made one purchase in the date range selected.)
One Year Since Last Purchase	Interval-Based	Customers who have made a purchase, but who have not purchased from you in the last 365 days (end date includes today).
Recent Purchase	Interval-Based	Customers who have purchased from you within the last 90 days (date picker is not applicable).
Refunders	Purchase History	Customers who have received a refund.
Repeat Customers	Purchase History	Customers who have made two or more purchases, with their first purchase occurring before the date range selected.
Single Purchase Customers (Lifetime)	Lifetime	Customers who have only purchased from you once over their lifetime as a customer.
Smile Loyalty Customers	Loyalty	Customers who are enrolled in your Smile to loyalty program and have loyalty points.
Three Months Since Last Purchase	Interval-Based	Customers who have made a purchase, but who have not purchased from you in the last 90 days (end date includes today).
Two Purchase Customers	Purchase History	Customers who have purchased from you twice in the date range selected. (Note: They may have made additional purchases outside of this date range, but they can only have made two purchases in the date range selected.)
VIP Customers	Purchase History	Customers marked as VIP on their profile in Glew.
Value Shoppers	Purchase History	Customers who have used a discount code before when purchasing.
Yatpo Customer Reviews	Reviews	Customers who have left Yatpo product reviews in the date range selected.
Zendesk Support Tickets	Support Tickets	Customers who have created Zendesk support tickets in the date range selected.
Zero Purchase Customers	Purchase History	Customers with zero purchases in the date range selected. (Note: Customers may have placed orders outside this date range, but they cannot have made a purchase within the date range selected.)

# Glew's Predefined Segments

## Table View

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Customers > Segments

Last 90 days  
May 17, 2021 - May 17, 2022

Create Segment

Predefined Segments

Table

Search Segments

All visible - None pinned

Segment Name	Customers	Orders	Revenue	AOV	Margin	Profit	LTV	Klaviyo Sync
Big Spenders	1,976	10,279	\$1,364,189.04	\$132.72	99.60%	\$1,359,887.73	\$1,884.26	Sync Disabled
Most Profitable	1,976	10,274	\$1,364,147.89	\$132.78	99.62%	\$1,359,994.14	\$1,882.34	Sync Disabled
Most Active Customers	1,959	11,445	\$1,214,072.02	\$104.08	99.58%	\$1,208,963.39	\$1,744.53	Sync Disabled
Refunders	797	2,212	\$175,322.69	\$79.26	99.27%	\$174,046.84	\$948.70	Sync Disabled
Repeat Customers	7,718	18,206	\$1,899,890.59	\$104.36	99.67%	\$1,893,603.81	\$934.90	Sync Disabled
High AOV	1,976	3,168	\$792,007.66	\$220.74	99.71%	\$789,482.77	\$932.45	Sync Disabled
Multi-Purchase Customers in The Last 12 Months	6,786	22,371	\$2,287,882.18	\$102.27	99.57%	\$2,278,337.51	\$908.61	Sync Disabled
Recent Purchase	3,587	10,817	\$1,126,067.99	\$104.10	99.54%	\$1,120,891.34	\$955.76	Sync Enabled
Active	6,187	16,559	\$1,686,348.02	\$101.84	99.57%	\$1,679,180.25	\$736.81	Sync Disabled
Abandoned Cart	5,729	10,830	\$1,107,454.33	\$102.26	99.53%	\$1,102,287.56	\$642.60	Sync Disabled
Voted Customer Reviews	976	2,608	\$236,443.20	\$90.66	99.41%	\$235,056.56	\$908.44	Sync Disabled
Sticky Loyalty Customers	10,464	17,210	\$1,753,721.67	\$101.76	99.59%	\$1,746,566.79	\$960.59	Sync Disabled
Multi-Purchase Customers (Refined)	33,815	26,253	\$2,645,956.59	\$101.52	99.59%	\$2,634,256.29	\$908.30	Sync Disabled
Value Shoppers	14,972	29,243	\$2,876,346.69	\$98.36	99.56%	\$2,863,592.29	\$903.88	Sync Disabled
New Purchase Customers	3,354	6,708	\$636,495.65	\$95.18	99.59%	\$635,840.43	\$479.07	Sync Disabled
All Customers	19,760	35,434	\$1,370,404.84	\$95.12	99.56%	\$1,315,442.45	\$440.52	Sync Disabled
At Risk	1,088	1,887	\$172,979.85	\$91.67	99.55%	\$172,793.46	\$440.21	Sync Disabled
Senders Support Tickets	273	410	\$33,564.52	\$95.52	99.47%	\$33,933.30	\$78.14	Sync Disabled
Full Price Customers	4,788	6,191	\$494,058.15	\$78.80	99.55%	\$491,850.16	\$243.36	Sync Disabled
One Purchase Customers	13,030	13,030	\$1,079,864.51	\$82.88	99.52%	\$1,074,646.68	\$956.61	Sync Disabled
Three Months Since Last Purchase	88,508	19,530	\$1,776,954.00	\$89.36	99.54%	\$1,768,793.42	\$95.40	Sync Enabled
Lost	87,297	16,989	\$1,508,967.03	\$88.83	99.54%	\$1,501,958.80	\$90.76	Sync Disabled
Accepts Marketing	88,192	28,352	\$2,724,808.21	\$96.11	99.59%	\$2,713,577.38	\$78.46	Sync Disabled
One Year Since Last Purchase	74,737	45	\$2,534.76	\$91.88	99.54%	\$2,523.94	\$73.22	Sync Disabled
First Purchase	12,022	17,228	\$1,470,214.25	\$85.36	99.41%	\$1,460,838.64	\$122.32	Sync Disabled
Low AOV	1,399	1,693	\$24,767.31	\$14.63	99.60%	\$24,669.16	\$84.86	Sync Disabled
Single Purchase Customers (Refined)	66,637	9,181	\$701,039.31	\$76.99	99.42%	\$699,076.22	\$73.04	Sync Disabled
Loyalty Lion Customers	0	0	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	Sync Disabled
Zero Purchase Customers	18,400	0	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	Sync Disabled
VIP Customers	0	0	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	Sync Enabled
Newest Purchased	43,708	0	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	Sync Disabled

# Utilizing Lapse Point Segments

**Lapse Point:** The amount of time (in days) that a merchant / store has to upsell its customer before that customer most likely is not going to purchase again

Calculation: Focuses on customers with an amount orders greater than 1. Takes the average distance between each purchase for each unique customer in order to provide this dynamic, actionable, dependable upsell window

Why is Lapse Point Important: Timing is so important in ecommerce / multi-channel! Too late? Competitor will swoop in and take your Customer away. Too early? You will annoy the Customer who will unsubscribe

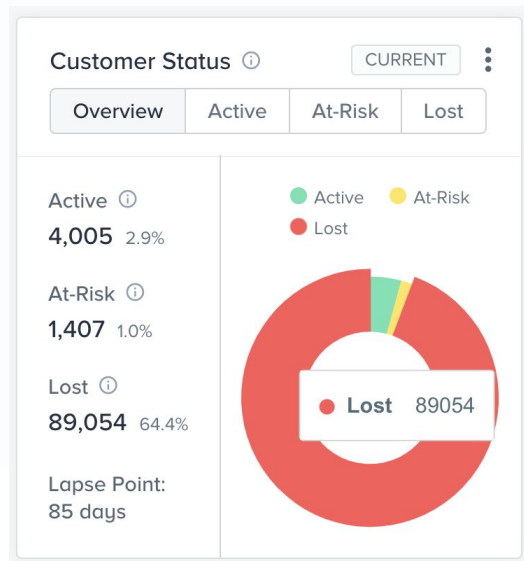
# Utilizing Lapse Point Segments

**Lapse Point Example: Clothing Company's Lapse Point is 85 days**

**Active:** Less than 80% of way through Lapse Point  
(bought 68 or less days ago)

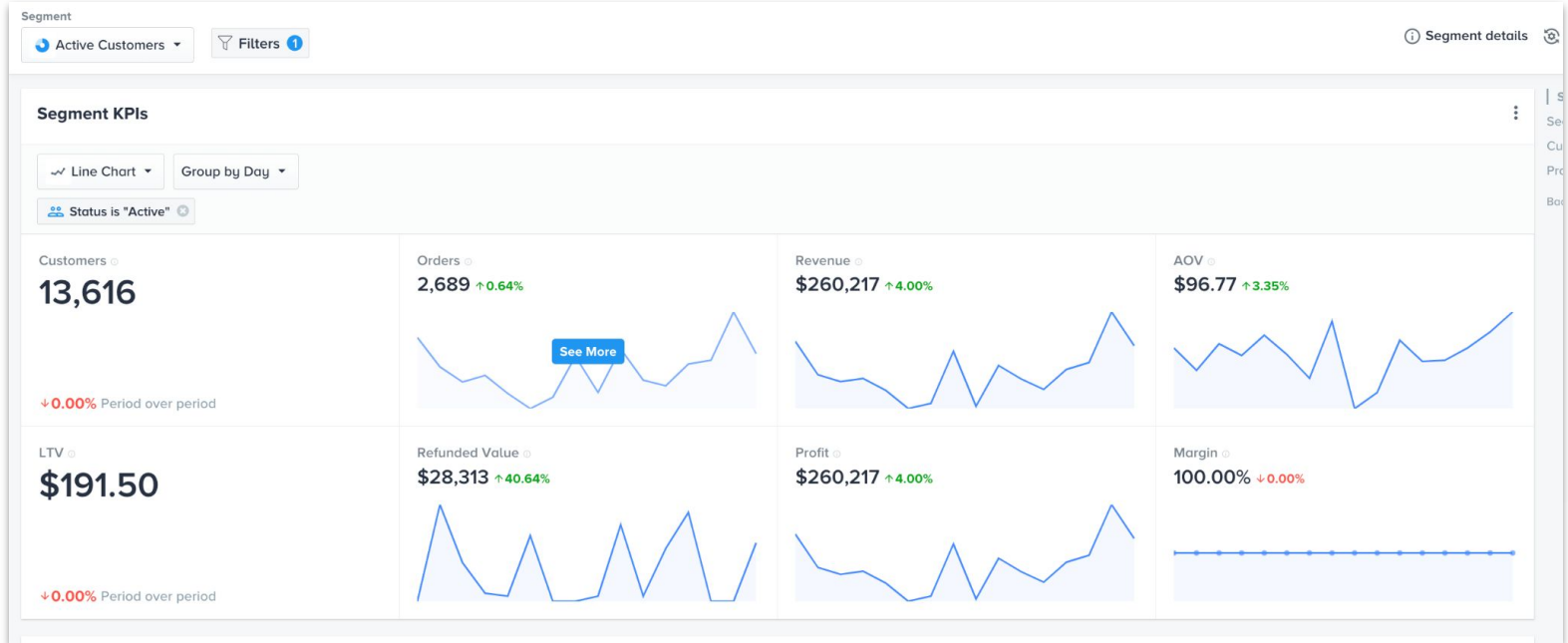
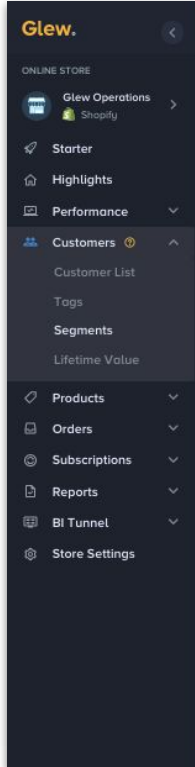
**At Risk:** Over 80% of the way through Lapse Point  
(bought 69-85 days ago)

**Lost:** Over Lapse Point  
(bought more than 85 days ago)






# Utilizing Lapse Point Segments





# Utilizing Lapse Point Segments


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
ONLINE STORE


 Glew Operations

 Shopify

 Starter

 Highlights

 Performance


 Customers

Customer List

Tags

Segments

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 Products

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Subscriptions

Reports

BI Tunnel

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## Segment Insights

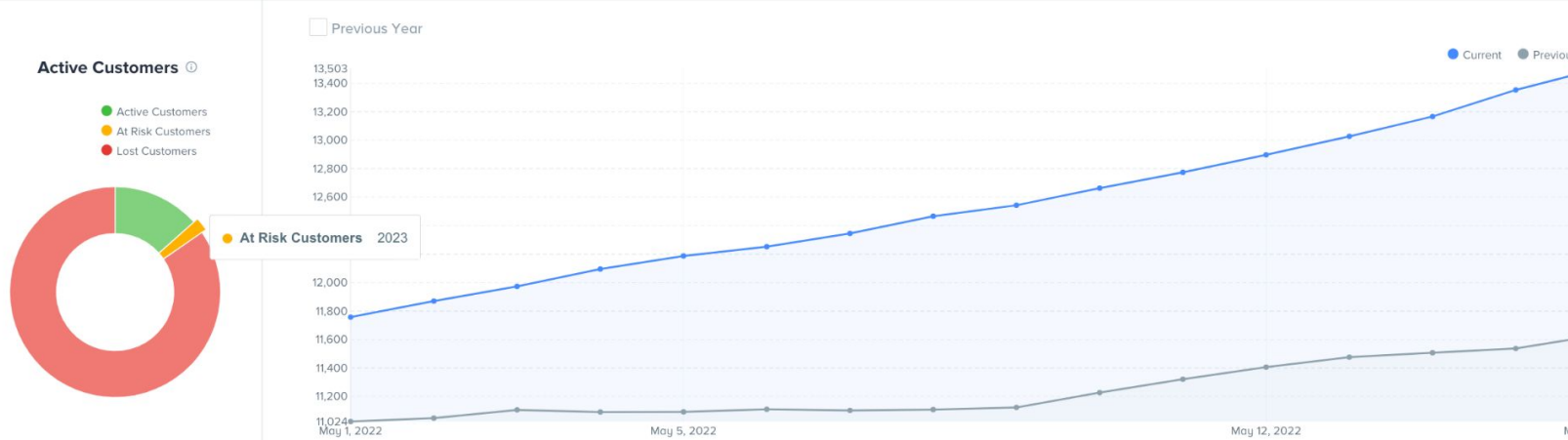
The calculations below are based your current lapse point of **154** days.

Active Customers ▾

Line Chart ▾

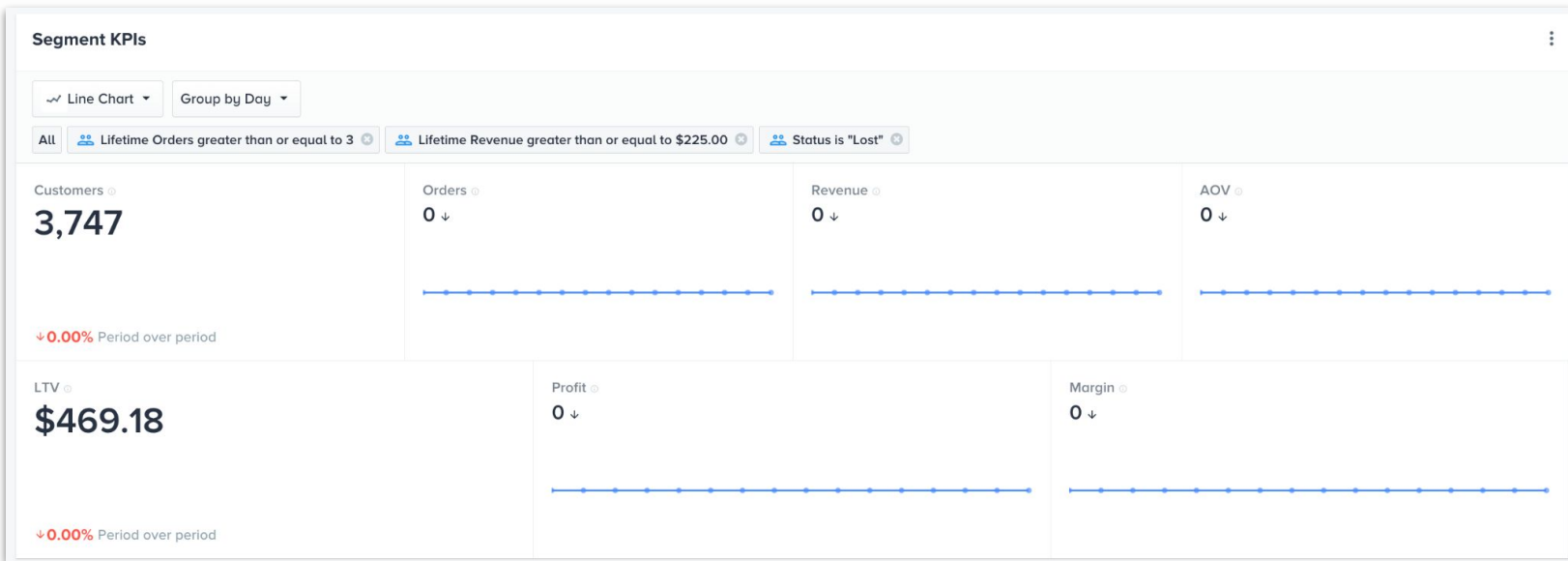
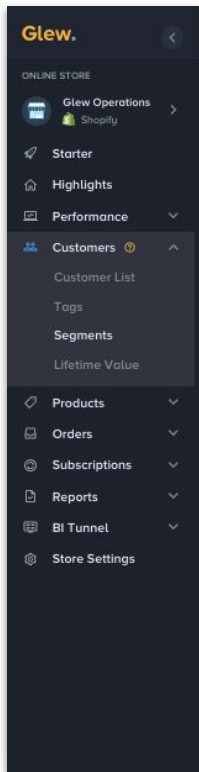
Group by Day ▾

 Status is "Active" ✕



# Bonus Lapse Point Segments

**Lost + VIP** - find your most valuable customers that you need back!



# Utilizing First Order Cohorts

**First Order Date:** filter within in Glew that allows to create a cohort by time frame. Investors love to see LTV based on acquisition year. You can also use this to create monthly cohorts of new customers and try different styles of email marketing. Also allows you to see products first orders by customers during that month or cohort

Edit "2021 Customers" Segment

Match 

all

 filters:

First Order Date

is after or on

2021-01-01

OR

First Order Date

is before or on

2021-12-31

OR

+ Add filter

Segment name

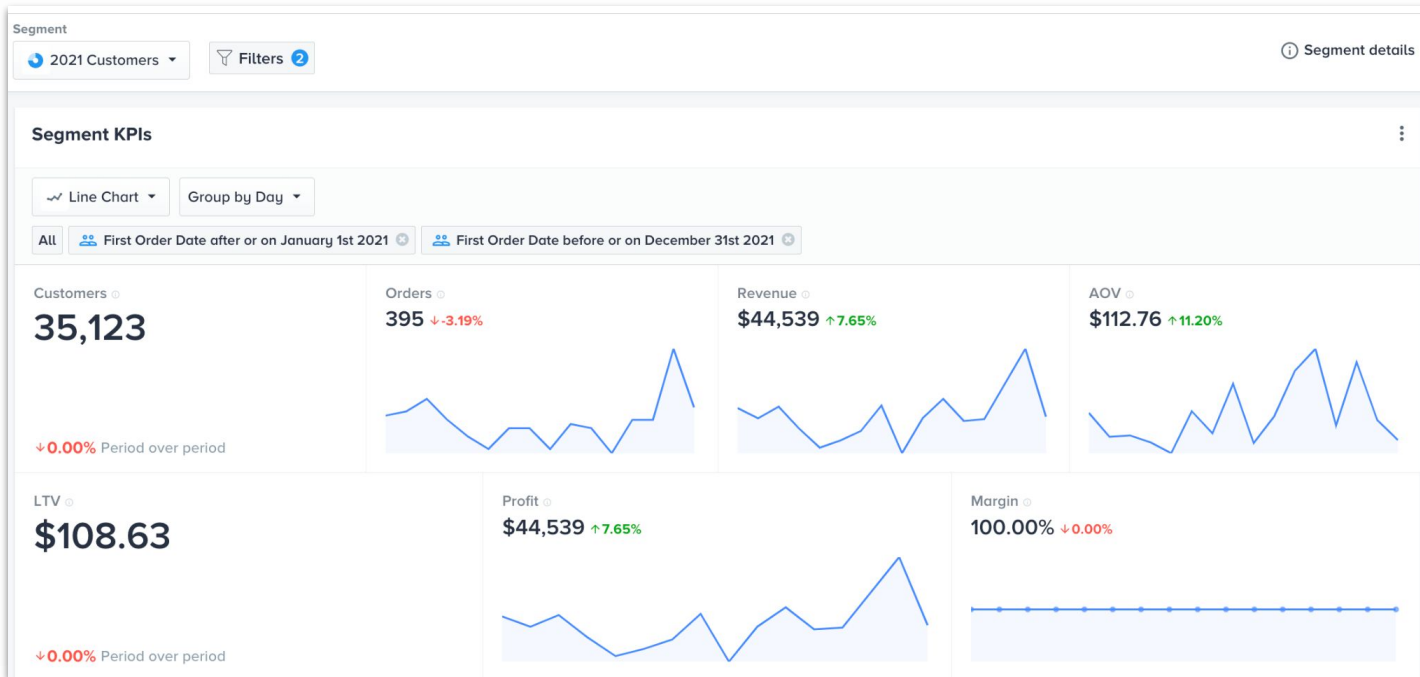
2021 Customers

# First Order Cohorts

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ONLINE STORE

- Glew Operations >
- Shopify >
- Starter
- Highlights
- Performance >
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- Customer List
- Tags
- Segments
- Lifetime Value
- Products >
- Orders >
- Subscriptions >
- Reports >
- BI Tunnel >
- Store Settings



# Utilizing Channel/UTM Filters

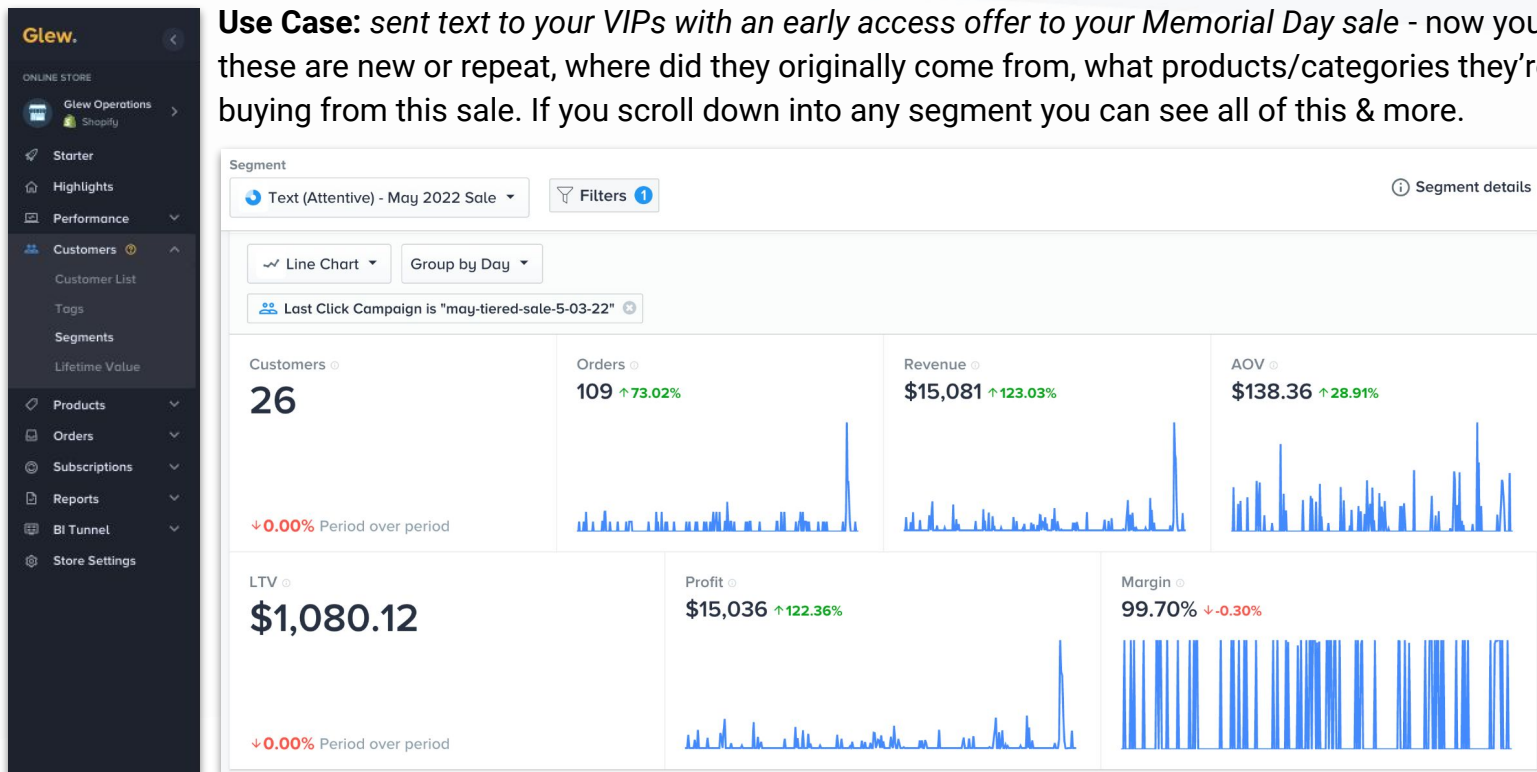
**First Order or Last Click UTM Filters:** filters within in Glew allow you to create a cohort based on their original acquisition data OR their most recent order data. Marketers love to see this because it directly ties their channel marketing efforts to a single customer or group of customers.

- Example: Text (Channel), Source (Attentive), Campaign (may-tiered-sale-5-03-22)

The screenshot shows the 'Edit "Text (Attentive) - May 2022 Sale" Segment' window. At the top, there's a 'Match' dropdown set to 'all' and a 'filters:' label. Below this, a filter is applied: 'Last Click Campaign' is set to 'is' and 'may-tiered-sale-5-03-22'. To the right of the filter value are 'OR' and 'trash' icons. A '+ Add filter' button is located below the filter list. The 'Segment name' field contains 'Text (Attentive) - May 2022 Sale'. The 'Segment description' field is empty. At the bottom, there are 'Cancel', 'Clear', and 'Save Segment' buttons.

# Campaign Specific Segments

**Use Case:** sent text to your VIPs with an early access offer to your Memorial Day sale - now you're curious if these are new or repeat, where did they originally come from, what products/categories they're actually buying from this sale. If you scroll down into any segment you can see all of this & more.



# Customer Service/Support Filters

**Customer Service/Support Filters:** filters within in Glew allow you to create a segment based on the number of tickets opened, created, and resolved for any time period. Executives love to see this because it directly shows them how much of an impact customer service can have on the overall LTV or “health” of their brand.

- Example: Tickets Created – greater than or equal to 3

**Edit Filters** [X]

Match **all** filters:

Tickets Created greater than or equal to 3 [OR] [AND]

[+ Add filter](#)

**Segment name**

3+ Support Tickets

**Segment description**

☐ Create new segment

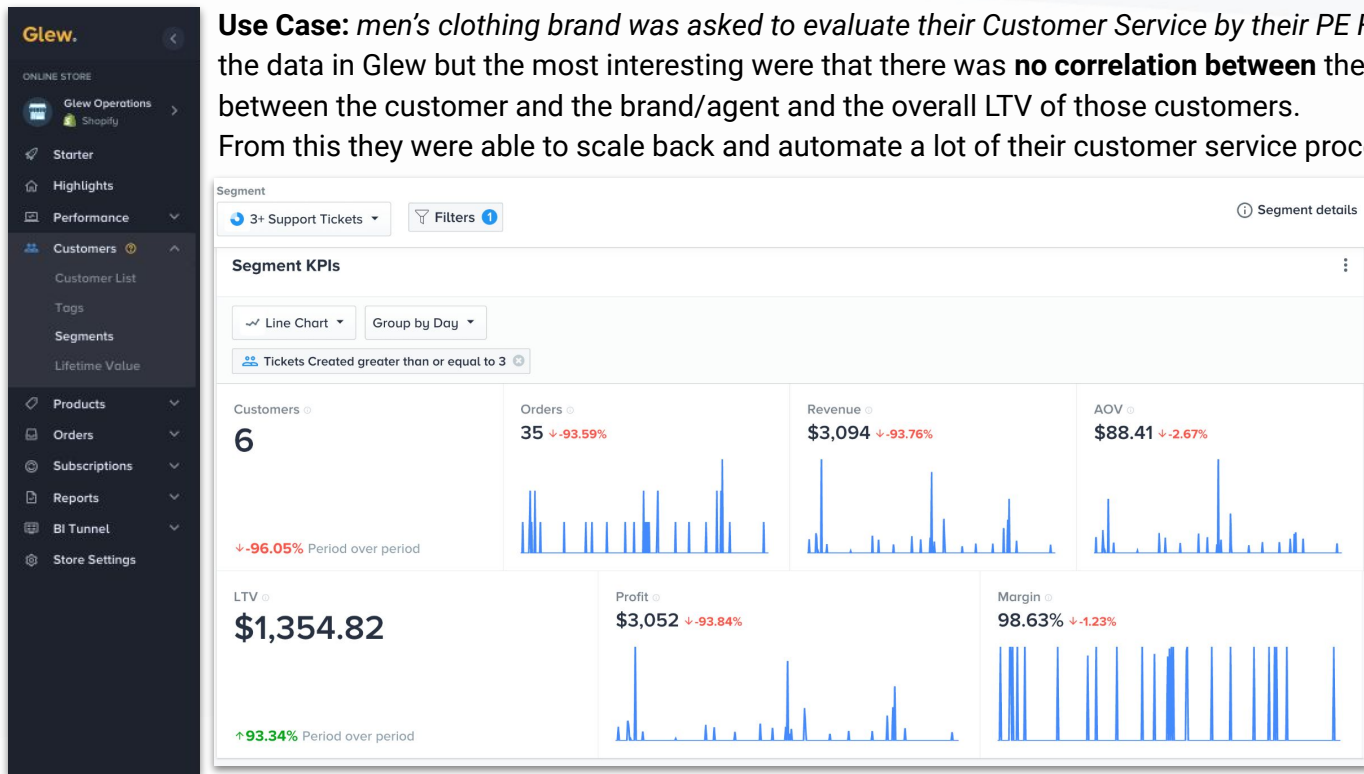
☐ Save updates to "3+ Support Tickets" segment

**Buttons:** Cancel Clear **Save Filters**



# Customer Service/Support Filters

**Use Case:** men's clothing brand was asked to evaluate their Customer Service by their PE Firm– they learned a lot from the data in Glew but the most interesting were that there was **no correlation between** the number of ticket exchanges between the customer and the brand/agent and the overall LTV of those customers. From this they were able to scale back and automate a lot of their customer service processes.



# Customer Service/Support Filters

- Follow up to previous use case: They did however learn that customer's whose **first purchase included a pant** > were higher LTV customers so they made an initial question in their chat asking if it was an inquiry related to a specific type of product...and if pants were mentioned...those were prioritized ahead of the rest.
- Some brands also see the opposite where they do have higher touch relationships that need nurturing. Those brands have segments made and push them into their email tool to create unique messaging compared to the tone and message of their lower touch customers.

# Customer Tags

**Customer Tags:** filters within in Glew allow you to create a segment based on customer tags. While we've always had reporting on tags within the Customer Tags/Groups section of the app– we recently made an update so that you can filter on those tags within the segments.

[illegible]

# Customer Tags

**Customer Tag Filter:** by filtering for certain customer tags or groups of tags you can now easily compare and analyze anything as it relates to a particular customer or group of customers.

### Edit "Customer List" Filters ×

Match all ▾ filters:

Customer Tag ▾

is ▾

How Heard: Instagram ▾

OR 🗑️

+ Add filter

☐ Create new segment

Cancel

Clear

Save Filters

# Customer Tag Example Segments

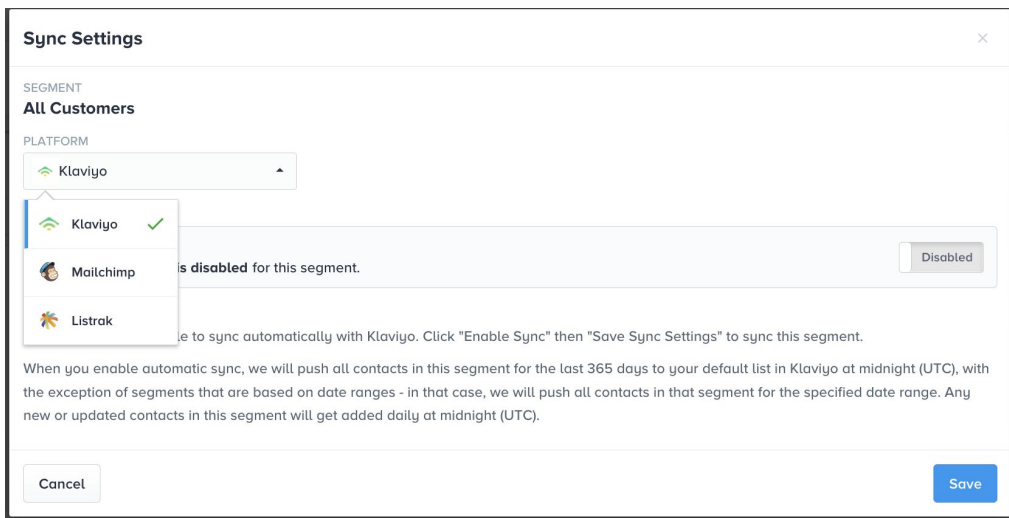
- Customers purchased during sale event vs. full price
- Customers who purchased with a discount code or group of codes
- How you heard about us surveys
- Birthdays
- Store Locations
- Wholesale
- Employees
- Loyalty & Rewards tiers
- First Purchase contained X product or product type
- Subscriptions vs. One Time customers

**PLUS** you can overlap the customer tag filter with any of the other (100) options there are!

# Segment Automation

**Segment Push & Automation:** Any of the predefined or custom segments that we've mentioned today can be automatically connected and dynamically updated within your email tool.

- Current push available for Mailchimp, Klaviyo, and Listrak
- Updates nightly
- Can export all to CSV
- Users push from there to paid advertising for targeted acquisition and retention tactics



The screenshot shows a 'Sync Settings' dialog box with a close button (X) in the top right corner. The 'SEGMENT' is set to 'All Customers'. The 'PLATFORM' dropdown menu is open, showing 'Klaviyo' as the selected option with a green checkmark, and 'Mailchimp' and 'Listrak' as other available options. Below the dropdown, a message states 'Sync is disabled for this segment.' with a 'Disabled' toggle switch. A note at the bottom of the dialog explains that enabling automatic sync will push contacts from the last 365 days to the default list in Klaviyo at midnight (UTC), with an exception for date range segments. At the bottom of the dialog are 'Cancel' and 'Save' buttons.

**Sync Settings**

SEGMENT  
**All Customers**

PLATFORM  
Klaviyo

Klaviyo ✓

Mailchimp is disabled for this segment. Disabled

Listrak

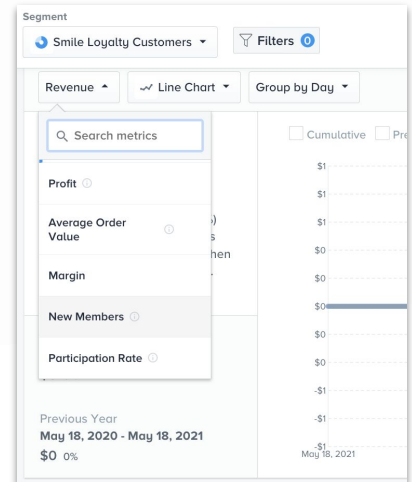
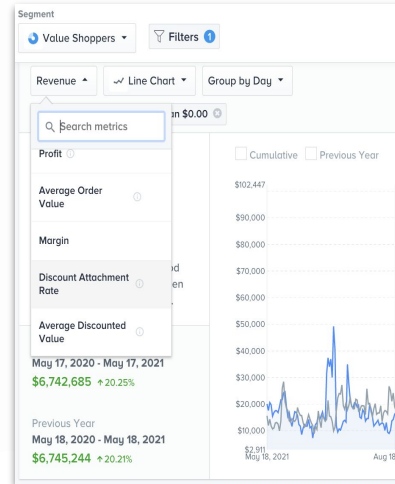
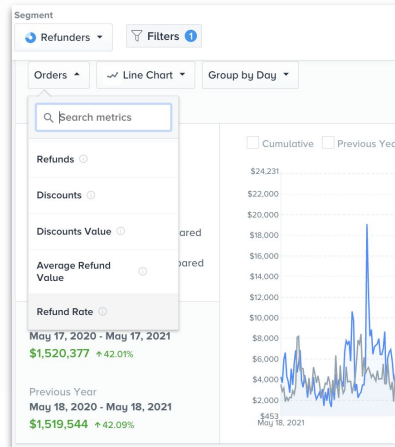
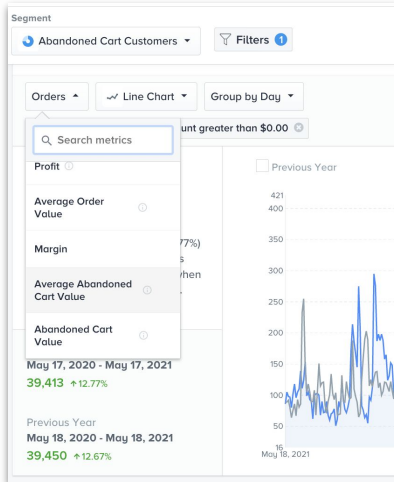
to sync automatically with Klaviyo. Click "Enable Sync" then "Save Sync Settings" to sync this segment.

When you enable automatic sync, we will push all contacts in this segment for the last 365 days to your default list in Klaviyo at midnight (UTC), with the exception of segments that are based on date ranges - in that case, we will push all contacts in that segment for the specified date range. Any new or updated contacts in this segment will get added daily at midnight (UTC).

Cancel Save

# BONUS KPIs

- Within each of the specialized prebuilt segments – you can filter and access some bonus KPIs.
- Some examples of that would be Refunders, Zendesk, Yotpo, Loyalty Lion, Smile, Discounts, Abandon Cart, etc.



# FAQs and Resources

## Where to find them:

- ✓ **FAQs:** <https://glew.io/faqs>
- ✓ **Webinars:** <https://glew.io/webinars>
- ✓ **Videos:** <https://glew.io/videos/>
- ✓ **In-app documentation:** Hover over tooltips in the app for more information
- ✓ **Look out for ongoing communication:**  
Monthly newsletters and webinars, bi-weekly training

## Have a question? Here are your options:

- 1) In-app documentation
- 2) FAQs
- 3) [support@glew.io](mailto:support@glew.io)



# Questions?