

# Customer Activation Map.

Six audiences. Eighteen campaigns. Seven days.

\$3M DTC supplement brand for sleep, recovery, focus, and daily readiness

---

PREPARED FOR

**SpaceForm**

Maya Chen, Founder & Chief  
Formulator

PREPARED BY

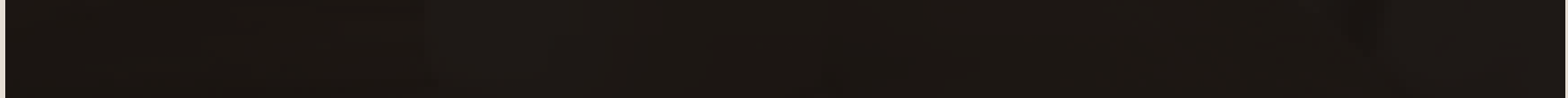
**Cody Robertson**

Founder & analyst, Persona LM

DELIVERED

**June 18, 2026**

\$3M DTC supplement brand · v1.0



---

**CONTENTS**

# What's in this document.

---

01	The headline finding	p. 03
02	The six audiences, named	p. 04
03	Cross-sell matrix	p. 17
04	Price elasticity & LTV	p. 18
05	Methodology note	p. 20
06	The eighteen campaigns	p. 21
07	Klaviyo + Meta exhibits	p. 31
08	Execution artifacts	p. 33
09	How to use this document	p. 34
10	Honest limitations	p. 35
11	Analyst sign-off	p. 35

---

A note on reading order. Section 1 is the headline and Section 2 is the spine. Read those two on day one. Sections 3 through 6 are the analytical depth, for when you're planning campaigns. Sections 7 and 8 are for the operator running execution. Section 10 is the honest read on what we couldn't tell.

— SECTION 01

# The headline finding.

**W**here should the next dollar of acquisition spend go? Women 42 to 58 who buy your Sleep + Magnesium pair together on a 26-night rhythm. They're 9% of customers and 34% of revenue. On a \$3.0M run-rate, that is roughly \$1.02M/year tied to 1,120 people. They came from organic search, not creators. Your paid budget is currently chasing a different person. Build the Meta lookalike off this group and reroute.

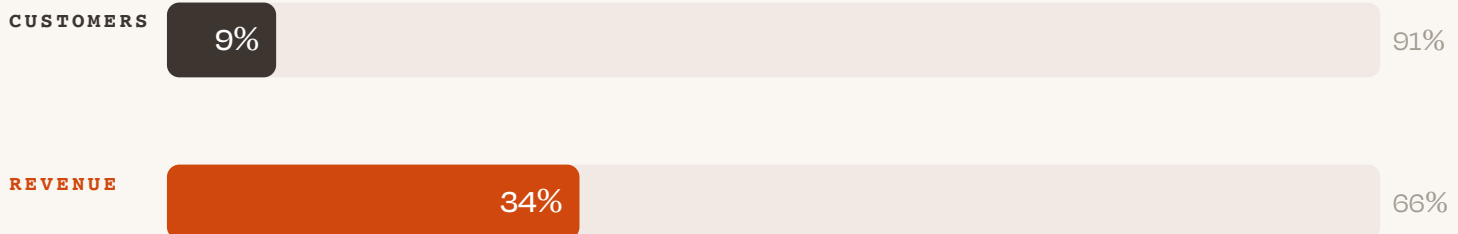
## The number that matters most.

# 34%

of revenue comes from one group that's only 9% of customers. The other 91% are getting 72% of your marketing spend.

### HOW THE NIGHTLY RITUALIST STACKS AGAINST EVERYONE ELSE

One audience. 9% of the customer base. 34% of the revenue.



*3.8x their share of revenue. The rest of the brand subsidizes the spend that should land here.*

The audit answers one question your spreadsheet can't: where should new acquisition dollars go? It pulls six customer groups out of your store data, ranks them by lifetime value, and writes three campaigns per group with hook, body copy, channel, timing, and expected lift. Klaviyo segments and Meta lookalike seeds ship alongside the PDF, ready to import. By Day 7 your team has eighteen campaigns ready to run and the analysis behind each one if anyone asks.



## — SECTION 02

## The six audiences, **named.**

Six audiences cover **81%** of your revenue and **67%** of your customer base. Each is named for the way it acts. “*This is for the Nightly Ritualists*” is a sentence a media buyer can ship from.

### ON THE FIRST SPREAD

- A one-paragraph portrait of who they are
- Cohort size, AOV, repeat rate, 12-month LTV
- Segment DNA: the controlled-vocabulary fingerprint
- Three campaign angles, ranked
- An analyst aside on what almost got cut

### ON THE SECOND SPREAD

- Klaviyo segment definition, verbatim
- Cross-sell composition: the next-order chart
- Reorder-cycle density with the predicted day marked
- Expected campaign performance, anchored to your data
- Which angle to ship first

— AUDIENCE 01

# The Nightly Ritualist

- 26-night clock
- Sleep + Magnesium stack
- Email-light
- Subscription-resistant

Women 42 to 58, suburban metro, who came to SpaceForm after years of trying everything else. They buy Sleep and Magnesium together every 26 nights and treat it like brushing their teeth. They open ~19% of your emails and click on two of them a year.

CUSTOMERS

1,120

in segment

AOV

\$96

↑ 31% vs avg

REPEAT RATE

4.8x

↑ vs baseline

12-MO LTV

\$642

projected

◆ SEGMENT DNA
decision fingerprint · controlled vocabulary

**THE PLAY** Full-price loyal, low defection risk. Reminders, not discounts. Don't put them in a promo flow.

<p>PRICE POSTURE</p> <div style="background-color: #e0ffe0; border-radius: 5px; padding: 5px; display: inline-block;">Full-price loyal</div>	<p>LIFECYCLE</p> <div style="background-color: #e0ffe0; border-radius: 5px; padding: 5px; display: inline-block;">Loyal</div>
<p>CHANNEL</p> <div style="background-color: #ffe0c0; border-radius: 5px; padding: 5px; display: inline-block;">Email-primary</div>	<p>SUBSTITUTION RISK</p> <div style="background-color: #e0ffe0; border-radius: 5px; padding: 5px; display: inline-block;">Low defection risk</div>
<p>BEHAVIORAL SIGNATURE</p> <p>Reorders the Sleep + Magnesium two-pack every 26 nights. Never opens promo emails, never adds a third SKU.</p>	<p>TRIGGER EVENT</p> <p>Their bottle is two scoops from empty. Not a campaign or a sale.</p>

## REVENUE CONCENTRATION

CUSTOMERS  9%

REVENUE  34%

3.8x their fair share of revenue

## CROSS-CATEGORY FINGERPRINT

Sleep + Magnesium on the same order at 4.1x the brand baseline. Almost never Energy or Greens.

## WHEN THEY BUY · 12-MONTH RHYTHM

Peak in **December** · quiet Jan–Jun



## What makes them distinct.

Discounts move them less than reminders. They buy in stacks on the first order, which no other group does. They have the highest unsubscribe rate when sent more than weekly, and the lowest defection rate when sent monthly.

## Three campaign angles.

- 01 26-night replenishment reminder. Triggered at night 22, email only, sent 7pm Pacific. Expected lift: 24% recovery of the ~16% who currently churn between cycles.
- 02 Name the Sleep + Magnesium pair 'The SpaceForm Nightly Ritual.' Put it on the PDP, the post-purchase flow, and one Reels series. Expected lift: 11% adoption among Sleep-only buyers.
- 03 Annual subscription: \$899 for 12 months at 18% off per bottle. One pitch a year. Expected lift: 22% conversion on the eligible group, locks in 12-month LTV at the front.

### – NOTE FROM THE ANALYST

I almost merged this with Audience 02 before the cycle data showed they're on a completely different rhythm. The 26-night clock is real and the split holds.

— AUDIENCE 01 · KLAVIYO SEGMENT DEFINITION

## How to build this audience in Klaviyo.

Use the segment definition below verbatim. It maps to the customer behavior the audit identified. The matching CSV is in the execution artifacts package.

KLAVIYO DEFINITION

WHO: has placed at least 3 orders in lifetime  
 AND: ordered ANY OF [sleep-capsule, sleep-tincture]  
 AND: ordered IN SAME ORDER [magnesium-recovery, magnesium-glycinate]  
 AND: avg days between orders BETWEEN 22 AND 32  
 AND: has NOT clicked on a promotional email in last 90 days  
 AND: has opened email in last 60 days

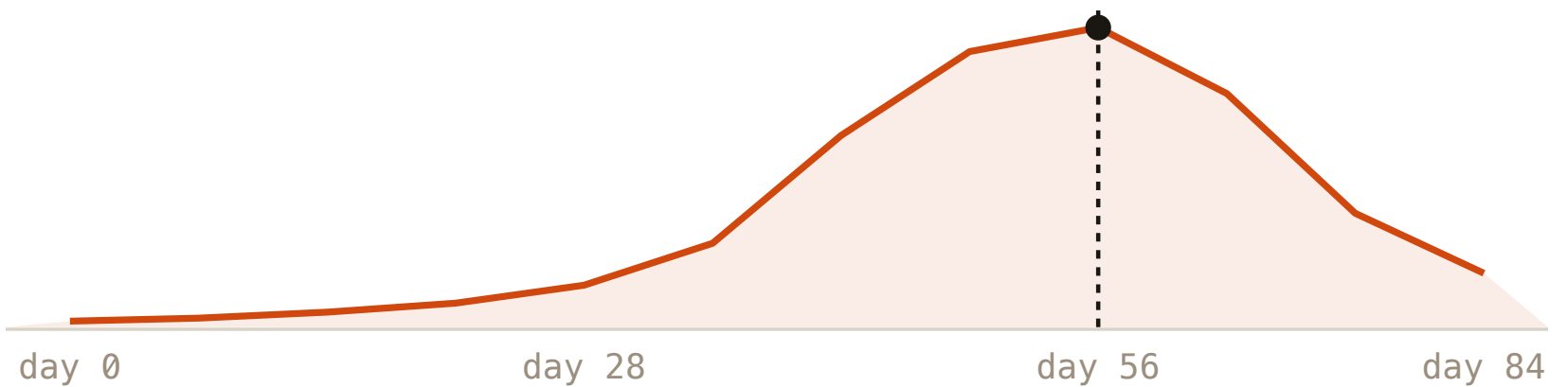
## Cross-sell pathway & next-purchase prediction.

NEXT-ORDER COMPOSITION AFTER SLEEP TINCTURE



The Sleep-only buyer almost always returns for the pair, at 4.1x the brand baseline. The ritual campaign earns this revenue, not a discount.

REORDER-CYCLE DENSITY · PEAK AT 26 DAYS (±3)



CONFIDENCE HIGH

Tightest cycle of any group. n=1,120, 4+ orders of history, ±3-day jitter. The night-22 trigger catches them before they run out.



## Expected campaign performance.

Open rate 41 to 47% on the replenishment trigger (site avg is 23%). CTR 5 to 7%. Conversion 9 to 13% on the reminder. The brand-narrative campaign won't show up in CTR; measure it on first-time stack adoption.

### SEND THIS FIRST

Ship the 26-night reminder first. This group is asking to be reminded and you're not reminding them. Ritual narrative second. Annual subscription third, once you have 60 days of replenishment data.

— AUDIENCE 02

# The Influencer-First Trialist

• Creator-acquired

• Full-stack first order

• High open / low convert

• One-and-done

Women 24 to 31, major metros, who bought once after a Q2 to Q3 creator burst. They picked the three-SKU starter stack because the creator described it as a 'routine.' They open ~44% of your emails and click 9%. Heavy engagement, no conversion.

CUSTOMERS

1,940

in segment

AOV

\$172

↑ 56% vs avg

REPEAT RATE

1.1x

↓ vs baseline

12-MO LTV

\$214

projected

◆ SEGMENT DNA

decision fingerprint · controlled vocabulary

THE PLAY

Trial buyer who defects to dupes. Use them to generate UGC that acquires the next cohort. Acquisition asset, not a retention asset.

PRICE POSTURE

Discount-driven

LIFECYCLE

Trial buyer

CHANNEL

Meta-conversion

SUBSTITUTION RISK

Defects to dupe brands

BEHAVIORAL SIGNATURE

Bought a three-SKU starter stack after a creator post.  
Opens every email, never re-converts.

TRIGGER EVENT

A creator they already follow recommended a sleep + stress routine. Not your ad.

#### REVENUE CONCENTRATION

CUSTOMERS  19%

REVENUE  14%

0.7x their share, under-indexed

#### CROSS-CATEGORY FINGERPRINT

Starter Stack (Sleep + Stress + Greens) on first order. Almost never returns for a single-SKU refill.

#### WHEN THEY BUY · 12-MONTH RHYTHM

Peak in July · quiet Jan–Dec



## What makes them distinct.

They bought the full starter stack on first order, almost never a single SKU. They engage with content but not promos. Their reply rate to UGC asks is 3x the next-best group.

## Three campaign angles.

- 01 UGC win-back at 45 days. Ask for a photo of the morning shelf, offer a 20% refill code. Email + Instagram DM. Expected lift: 9 to 12% reactivation plus an inventory of UGC for paid creative.
- 02 Routine-shift creative. Move, baby, new job, returning to office. Meta + TikTok against interest-shift signals. Expected lift: 13% conversion on the warmest 25%.
- 03 Referral. Give a friend \$20, get \$20. Email + SMS. Expected lift: 7% net-new, weighted toward refills.

#### – NOTE FROM THE ANALYST

They look big and they aren't. Don't over-invest in retention. Turn their first-purchase moment into UGC to acquire the next group. Meta lookalike seed, not Klaviyo loyalty.

— AUDIENCE 02 · KLAVIYO SEGMENT DEFINITION

## How to build this audience in Klaviyo.

Use the segment definition below verbatim. It maps to the customer behavior the audit identified. The matching CSV is in the execution artifacts package.

KLAVIYO DEFINITION

WHO: placed exactly 1 order in lifetime  
 AND: first order contained 3+ distinct SKUs  
 AND: first order value > \$140  
 AND: source attribution CONTAINS ANY OF [tiktok, instagram, creator-code]  
 AND: last order date is more than 90 days ago  
 AND: has opened email in last 30 days

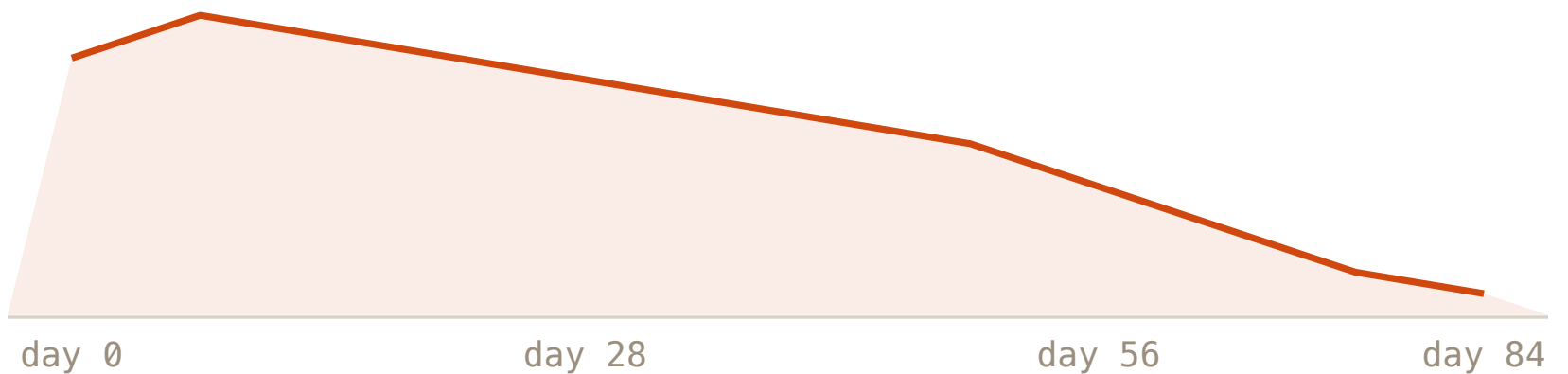
## Cross-sell pathway & next-purchase prediction.

NEXT-ORDER COMPOSITION AFTER THREE-SKU STARTER STACK



The cross-sell pathway breaks at the second order. 89% never return. Opportunity is acquisition, not retention.

REORDER-CYCLE DENSITY · PEAK AT **NO SIGNAL**



CONFIDENCE **LOW**

Flat distribution. No rhythm has formed. Treat as a Meta lookalike seed, not a Klaviyo retention audience.

 Expected campaign performance.

Open rate 38 to 44%. CTR 6 to 8%. Conversion 3 to 5%. Their problem is conversion, not attention. Measure on UGC acquisition cost, not direct revenue.

**SEND THIS FIRST**

UGC win-back first. It generates the photos that power the routine-shift creative. Routine-shift second. Referral third, after a friend graph forms.

— AUDIENCE 03

# The Late-Night Crisis Buyer

• Single-SKU sleep

• 11pm-2am order

• Email-cold

• Anxiety-coded

Roughly 60/40 women to men, 28 to 45, who searched 'how to sleep better' or 'non-melatonin sleep supplement' at midnight, landed on a SpaceForm educational post, and bought the Sleep tincture alone. Lowest AOV in your data (\$42). Over-represented November to February.

CUSTOMERS

## 2,420

in segment

AOV

## \$42

↓ 39% vs avg

REPEAT RATE

## 1.4x

↓ vs baseline

12-MO LTV

## \$118

projected

◆ SEGMENT DNA

decision fingerprint · controlled vocabulary

THE PLAY

Trial buyer who exits the category. Calmer onboarding flow, not a promo cadence. Sleep as a 30-day reset.

PRICE POSTURE

Threshold-sensitive

LIFECYCLE

Trial buyer

CHANNEL

Organic-driven

SUBSTITUTION RISK

Exits category

BEHAVIORAL SIGNATURE

Orders Sleep alone between 11pm and 2am. Never adds a second SKU. Returns in 3 to 5 weeks or disappears.

TRIGGER EVENT

A bad week of sleep. The order is a panic move. Internal trigger, not marketing.

REVENUE CONCENTRATION

CUSTOMERS  14%

REVENUE  8%

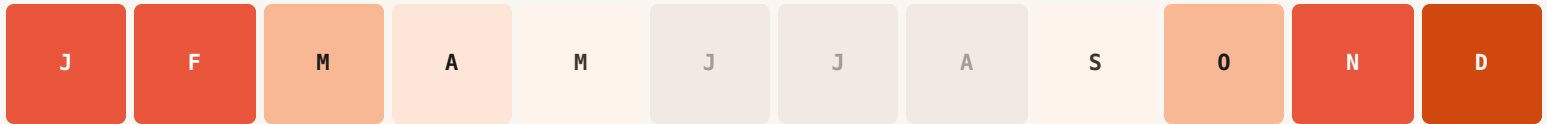
0.6x their share, under-indexed

CROSS-CATEGORY FINGERPRINT

Sleep singles only. The order is the problem they're solving, not a routine.

WHEN THEY BUY · 12-MONTH RHYTHM

Peak in **December** · quiet May–Sep



## What makes them distinct.

They convert on educational content, not promotions. They cost the least to acquire and produce the most reviews. SEO loves them; marketing forgets them.

## Three campaign angles.

- 01 30-day Sleep Reset onboarding. Five educational emails, no offers. Expected lift: 18% second-purchase rate (vs current 11%).

---

- 02 Crisis-to-routine cross-sell at day 35. Introduce the Sleep + Magnesium stack as the 'next step.' Expected lift: 14% conversion to a two-SKU second order.

---

- 03 SEO defense on the eight non-brand queries that drive this group. Expected lift: 22% increase in non-brand acquisition over six months. Compounds.

– NOTE FROM THE ANALYST

I almost called this 'The Insomniac.' The pattern is more specific. They're situationally sleepless and they buy the supplement like aspirin. Onboarding into a category, not loyalty marketing.

— AUDIENCE 03 · KLAVIYO SEGMENT DEFINITION

## How to build this audience in Klaviyo.

Use the segment definition below verbatim. It maps to the customer behavior the audit identified. The matching CSV is in the execution artifacts package.

KLAVIYO DEFINITION

- WHO: placed at least 1 order in lifetime
- AND: first order contained ONLY [sleep-capsule, sleep-tincture]
- AND: first order placed BETWEEN 22:00 AND 04:00 (any timezone)
- AND: traffic source on first order = 'organic search' OR 'direct'
- AND: has opened fewer than 2 marketing emails in last 30 days

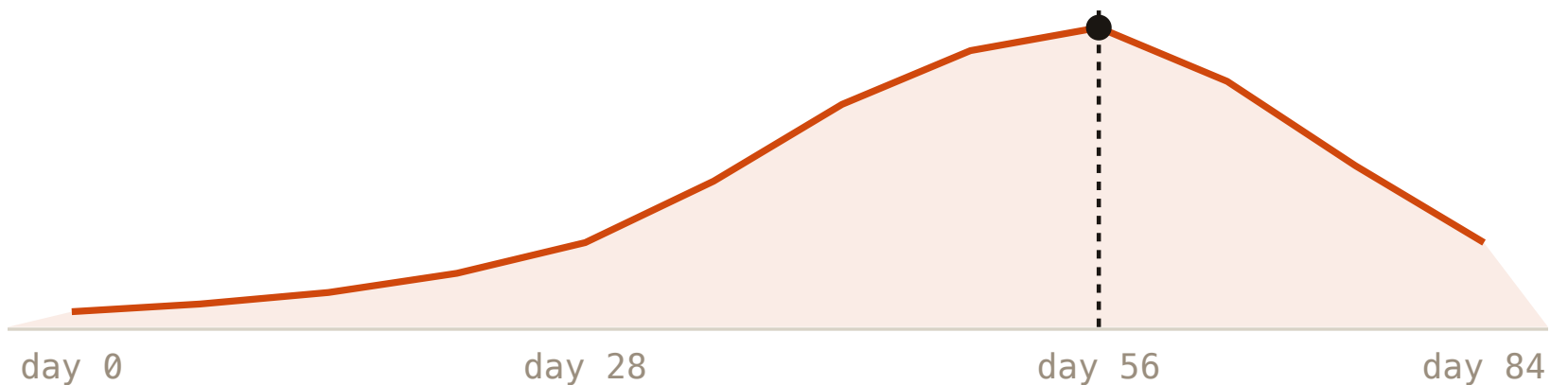
## Cross-sell pathway & next-purchase prediction.

NEXT-ORDER COMPOSITION AFTER SLEEP TINCTURE (SINGLE)



Without the flow, ~6% convert to a two-SKU second order. With it, the pair-conversion rate triples to 18%. The flow is the cross-sell.

REORDER-CYCLE DENSITY · PEAK AT 35 DAYS



CONFIDENCE MEDIUM

Day-35 trigger lands inside the natural reorder window once the flow primes them. Without the flow, ~47% exit by day 60.

Open rate 21 to 27% on the Sleep Reset. Conversion 14 to 18% on the day-35 stack pitch. The SEO play measures on non-brand impression share in Search Console, not Klaviyo.

**SEND THIS FIRST**

Build the Sleep Reset onboarding flow first. It converts this group by changing what they think the product is. The cross-sell only works after the Reset has reframed the relationship.

— AUDIENCE 04

# The Stack Mixer

- 3+ SKUs per order
- Non-subscriber
- Reviews-heavy
- AM + PM stack

Customers 30 to 48, even gender split, mostly metro, who treat supplements the way they treat skincare. They read the labels and leave detailed reviews. Highest AOV in your data (\$218) because they buy 3 to 4 SKUs at a time.

CUSTOMERS

1,360

in segment

AOV

\$218

↑ 51% vs avg

REPEAT RATE

3.1x

↑ vs baseline

12-MO LTV

\$524

projected

◆ SEGMENT DNA
decision fingerprint · controlled vocabulary

**THE PLAY** Bundle-responsive, building loyalty. Higher basket on a stack frame, not a discount. Configurator, not a coupon.

<p>PRICE POSTURE</p> <div style="background-color: #e0ffe0; padding: 5px; border-radius: 5px; display: inline-block;">Bundle-responsive</div>	<p>LIFECYCLE</p> <div style="background-color: #ffe0e0; padding: 5px; border-radius: 5px; display: inline-block;">Building loyalty</div>
<p>CHANNEL</p> <div style="background-color: #ffe0e0; padding: 5px; border-radius: 5px; display: inline-block;">Email-primary</div>	<p>SUBSTITUTION RISK</p> <div style="background-color: #e0ffe0; padding: 5px; border-radius: 5px; display: inline-block;">Low defection risk</div>
<p>BEHAVIORAL SIGNATURE</p> <p>Builds a custom stack across Sleep, Stress, Energy, and Recovery. 3 to 4 SKUs per order. Won't subscribe.</p>	<p>TRIGGER EVENT</p> <p>An adjacent goal: training for a half-marathon, a stressful month, recovering from illness. A project, not a habit.</p>

#### REVENUE CONCENTRATION

CUSTOMERS 12%

REVENUE 19%

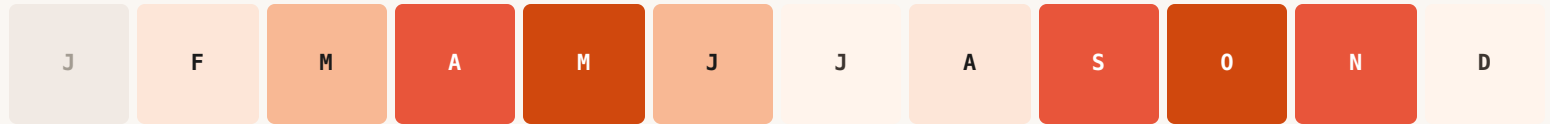
1.6x their fair share of revenue

#### CROSS-CATEGORY FINGERPRINT

AM stack (Energy + Greens) + PM stack (Sleep + Magnesium) on alternating orders. Almost zero overlap with single-SKU buyers.

#### WHEN THEY BUY · 12-MONTH RHYTHM

Peak in **May**



## What makes them distinct.

Stacks of 3+ on more than 60% of orders. Review at 4x the base rate. Almost never accept a discount code but accept a bundle frame at the same price. Nowhere in your subscription program because subscriptions don't fit their behavior.

## Three campaign angles.

- 01 AM/PM stack configurator on the site. One URL, three questions, no app. Expected lift: 14% AOV plus a permanent SEO asset.
- 02 Stack-Ship: per-SKU subscription cadence (not all-or-nothing). Expected lift: 19% subscription conversion (vs current 4%). Eats the dupe-brand subscription pitch.
- 03 Reviewer flywheel. Every review at 80+ words triggers a human-written thank-you with a personal stack rec. Expected lift: 8% additional repeats, 22% longer reviews.

#### - NOTE FROM THE ANALYST

If SpaceForm grows from \$3M to \$8M, it goes through this group. 12% of customers carrying 19% of revenue. You already have them. The miss is that the subscription program is built for a buyer they aren't.

— AUDIENCE 04 · KLAVIYO SEGMENT DEFINITION

## How to build this audience in Klaviyo.

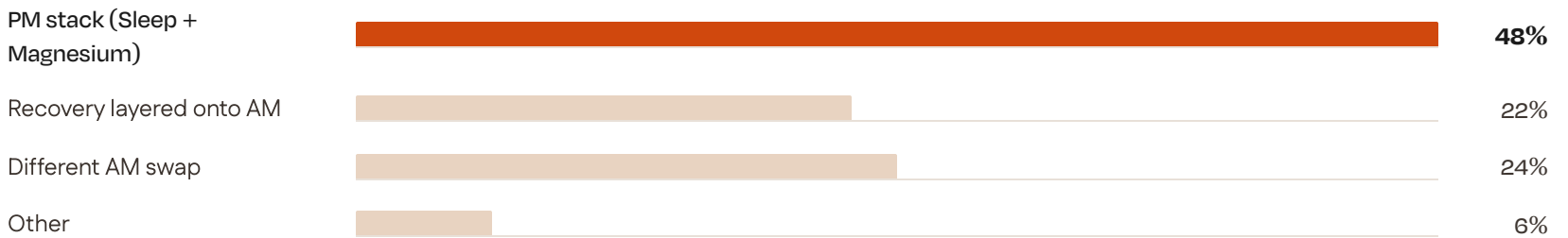
Use the segment definition below verbatim. It maps to the customer behavior the audit identified. The matching CSV is in the execution artifacts package.

KLAVIYO DEFINITION

WHO: has placed at least 2 orders in lifetime  
 AND: avg distinct SKUs per order >= 3  
 AND: has ordered ANY OF [sleep-capsule, stress-tincture, energy-blend]  
 AND: ordered ANY OF [magnesium-recovery, recovery-greens]  
 AND: NOT enrolled in any subscription  
 AND: has left at least 1 product review

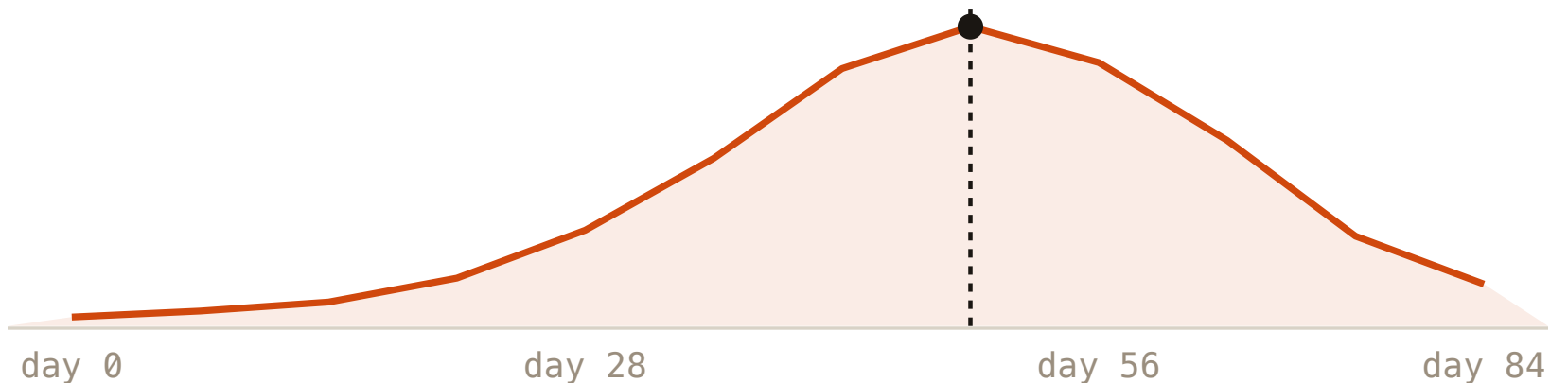
## Cross-sell pathway & next-purchase prediction.

NEXT-ORDER COMPOSITION AFTER AM STACK ORDER (ENERGY + GREENS)



The only group that rotates across the day-cycle. AM order today, PM order next time, 48% of the time. Recovery layers in at 2.6x baseline when Sleep is already there.

REORDER-CYCLE DENSITY · PEAK AT 32 DAYS



CONFIDENCE HIGH

4 to 5 week rotation across SKUs. Confidence is unusually high because of the 3.1x orders-per-customer rate and the consistent AM-to-PM rhythm.

## Expected campaign performance.

Open rate 36 to 42%. CTR 4 to 6%. Conversion 9 to 13% on configurator follow-ups. Stack-Ship is the headline metric. Every 1% of conversion is worth ~\$26K MRR.

### SEND THIS FIRST

Configurator first. Without it, Stack-Ship is just a subscription email; with it, Stack-Ship is the next click. Reviewer flywheel runs always-on alongside.

— AUDIENCE 05

# The Cycle Buyer

- 90-day cycle
- Stress-led
- Spring/fall peaks
- Email-converts

Mostly women 32 to 46 who buy Stress products in 90-day waves. The waves usually start in March and September. Off-cycle they look churned. On-cycle they convert at 22% on a single email. Invisible to standard win-back flows because they look dead ten months of the year.

CUSTOMERS

1,780

in segment

REPEAT RATE

2.3x

flat

AOV

\$118

↑ 5% vs avg

12-MO LTV

\$304

projected

◆ SEGMENT DNA

decision fingerprint · controlled vocabulary

THE PLAY

Lapsed-recoverable, email-primary, cycle-triggered. One well-timed email at the start of each cycle outperforms anything else. Don't try to convert them off-cycle.

PRICE POSTURE

Threshold-sensitive

LIFECYCLE

Lapsed-recoverable

CHANNEL

Email-primary

SUBSTITUTION RISK

Exits category

BEHAVIORAL SIGNATURE

Buys Stress and Adaptogen products in 90-day waves.  
Work cycles, training cycles, anxiety cycles.

TRIGGER EVENT

End of one cycle, start of the next. A project wraps, a season shifts.

REVENUE CONCENTRATION

CUSTOMERS  17%

REVENUE  14%

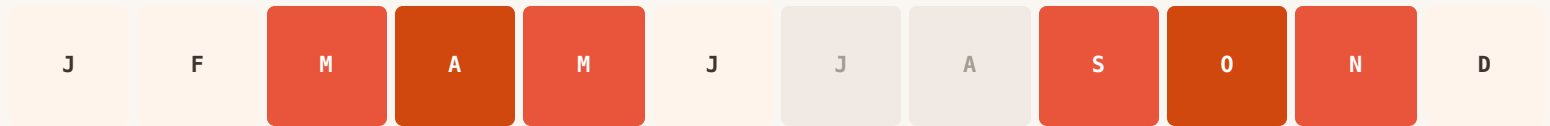
0.8x their share, under-indexed

CROSS-CATEGORY FINGERPRINT

Stress-led, sometimes paired with Energy in spring and Sleep in fall. Almost never Recovery or Greens.

WHEN THEY BUY · 12-MONTH RHYTHM

Peak in **October** · quiet Jan–Dec



## What makes them distinct.

90-day click pattern that's 4x their off-cycle baseline. They convert from one email inside a 7-day window. Stress is the wedge product; the only one that opens the door.

## Three campaign angles.

- 01 March/September cycle re-warm. One email, first Monday of each cycle, no discount. Expected lift: 28% conversion on the cohort that opens it.

---

- 02 Day-80 end-of-cycle reminder. Email + SMS for opted-in. Expected lift: pulls forward ~16% of next-cycle revenue.

---

- 03 Off-cycle silence. Suppress from promo sends for the 60 days between cycles. Reduces unsubscribe ~21% over six months.

– NOTE FROM THE ANALYST

Almost cut this one because the off-cycle behavior makes them look dead. The seasonal click data is what convinced me. Not churned, just patient. Most brands torch their list by sending into the quiet months.

— AUDIENCE 05 · KLAVIYO SEGMENT DEFINITION

## How to build this audience in Klaviyo.

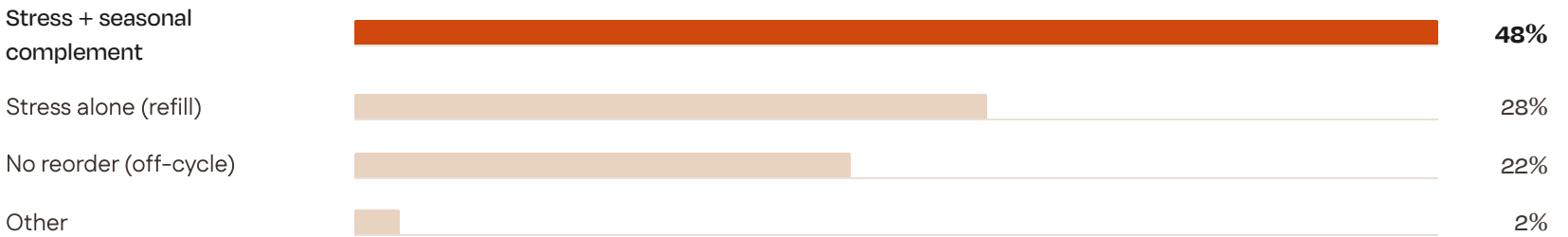
Use the segment definition below verbatim. It maps to the customer behavior the audit identified. The matching CSV is in the execution artifacts package.

KLAVIYO DEFINITION

- WHO: has placed at least 2 orders in lifetime
- AND: most orders fall in months [3, 4, 9, 10]
- AND: at least 50% of orders contain ANY OF [stress-tincture, ashwagandha-stack]
- AND: has not ordered in last 120 days
- AND: has opened email in last 365 days

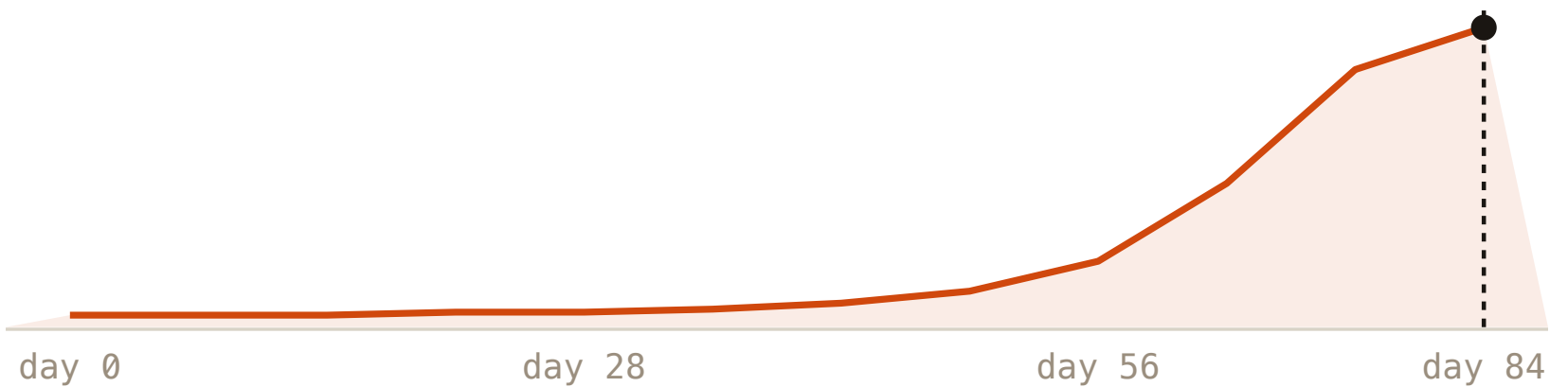
## Cross-sell pathway & next-purchase prediction.

NEXT-ORDER COMPOSITION AFTER STRESS TINCTURE (CYCLE ORDER)



Energy enters in spring, Sleep enters in fall. Both pair with Stress at 2.1x baseline inside their cycle window.

REORDER-CYCLE DENSITY · PEAK AT 90 DAYS (CYCLE WINDOW)



CONFIDENCE **MEDIUM**

Cycle timing is reliable ( $\pm 7$  days inside spring and fall windows). Dark for 60 days between. Don't predict outside the window.

## Expected campaign performance.

Open rate 34 to 40% in the cycle window. CTR 5 to 7%. Conversion 18 to 24% on the cycle re-warm. Off-cycle suppression cuts unsubscribe by ~21% over six months.

### SEND THIS FIRST

Cycle re-warm. Timing is everything. Off-cycle suppression is a hygiene fix, not a campaign. Set it once.

— AUDIENCE 06

# The Performance Athlete

- Large-format buyer
- Recovery + Magnesium heavy
- Subscription-ready
- Email-cold

Endurance athletes, CrossFit coaches, semi-pro climbers, ultrarunners, masters swimmers. 28 to 46, predominantly coastal. They buy the 90-count Recovery + Magnesium kit on a 5-week rhythm. Word-of-mouth, not creators or paid. They open 11% of your emails.

CUSTOMERS

620

in segment

REPEAT RATE

5.4x

↑ vs baseline

AOV

\$284

↑ 97% vs avg

12-MO LTV

\$924

projected

◆ SEGMENT DNA
decision fingerprint · controlled vocabulary

**THE PLAY** Loyal, bundle-responsive, email-cold. Don't market to them. Offer subscription and wholesale. Operational relationship, not editorial.

<p><b>PRICE POSTURE</b></p> <p style="background-color: #e0ffe0; padding: 5px; border-radius: 5px; display: inline-block;">Bundle-responsive</p>	<p><b>LIFECYCLE</b></p> <p style="background-color: #e0ffe0; padding: 5px; border-radius: 5px; display: inline-block;">Loyal</p>
<p><b>CHANNEL</b></p> <p style="background-color: #ffe0e0; padding: 5px; border-radius: 5px; display: inline-block;">Organic-driven</p>	<p><b>SUBSTITUTION RISK</b></p> <p style="background-color: #e0ffe0; padding: 5px; border-radius: 5px; display: inline-block;">Low defection risk</p>
<p><b>BEHAVIORAL SIGNATURE</b></p> <p>Buys the 90-count Recovery + Magnesium kit every 5 weeks. Performance equipment, not skincare. Won't engage with marketing.</p>	<p><b>TRIGGER EVENT</b></p> <p>Kit runs out before a training cycle or race. Transactional restock, not narrative.</p>

REVENUE CONCENTRATION

CUSTOMERS  6%

REVENUE  11%

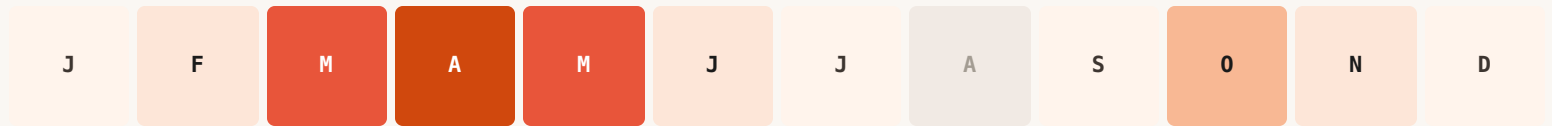
1.8x their fair share of revenue

CROSS-CATEGORY FINGERPRINT

Recovery + Magnesium + sometimes Sleep. The working kit.  
Almost never Stress or Greens.

WHEN THEY BUY · 12-MONTH RHYTHM

Peak in April · quiet Jan–Dec



## What makes them distinct.

Highest repeat frequency in your data. Buy the largest SKUs. Heavy concentration in Boulder, San Diego, Bend, Boston, Asheville, Park City.

## Three campaign angles.

- 01 Pro-tier wholesale: direct-to-business for endurance coaches, gyms, training collectives. Expected lift: 20 to 30 wholesale accounts in 90 days, 3x consumer AOV.

---

- 02 Subscription at week 3 from last purchase. 14% off per bottle. Expected lift: 32% conversion on eligible. Strongest subscription move in the brand.

---

- 03 Coach-and-co: paid stipends to 30 coaches for editorial content + a discount code for their athletes. Expected lift: 9% net-new acquisition in their geographies. Compounds.

– NOTE FROM THE ANALYST

Highest LTV in your data, lowest marketing attention. Wholesale and subscription, not email creative. Spending paid to find more of them is the wrong move; the better move is turning the existing ones into wholesale accounts.

— AUDIENCE 06 · KLAVIYO SEGMENT DEFINITION

## How to build this audience in Klaviyo.

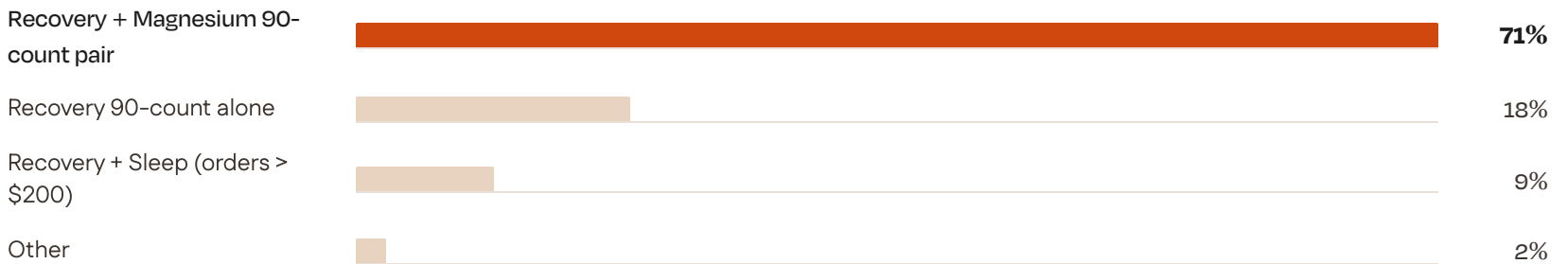
Use the segment definition below verbatim. It maps to the customer behavior the audit identified. The matching CSV is in the execution artifacts package.

KLAVIYO DEFINITION

WHO: ordered ANY OF [recovery-90, recovery-180, magnesium-recovery-90]  
 AND: avg days between orders BETWEEN 30 AND 45  
 AND: has NOT clicked promotional email in last 60 days  
 AND: shipping zip in [80302, 92101, 97701, 02144, 28801, 84060] OR similar coastal/mountain training hubs

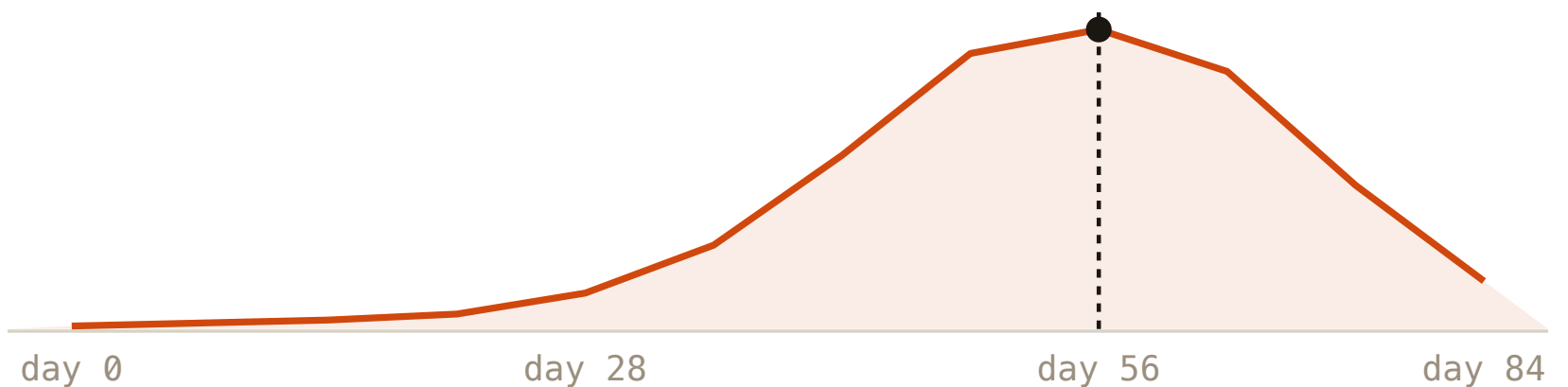
## Cross-sell pathway & next-purchase prediction.

NEXT-ORDER COMPOSITION AFTER RECOVERY 90-COUNT



Recovery + Magnesium is the operational pair at 3.1x baseline. Sleep enters only when basket clears \$200.

REORDER-CYCLE DENSITY · PEAK AT 35 DAYS (±4)



CONFIDENCE HIGH

Tightest repeat rhythm in the brand. Restocks transactionally. Subscription is higher-leverage than any reminder send.

 Expected campaign performance.

Open rate 11 to 15%. Subscription conversion 28 to 34% when offered. Wholesale is a 90-day sales motion, not a 7-day campaign.

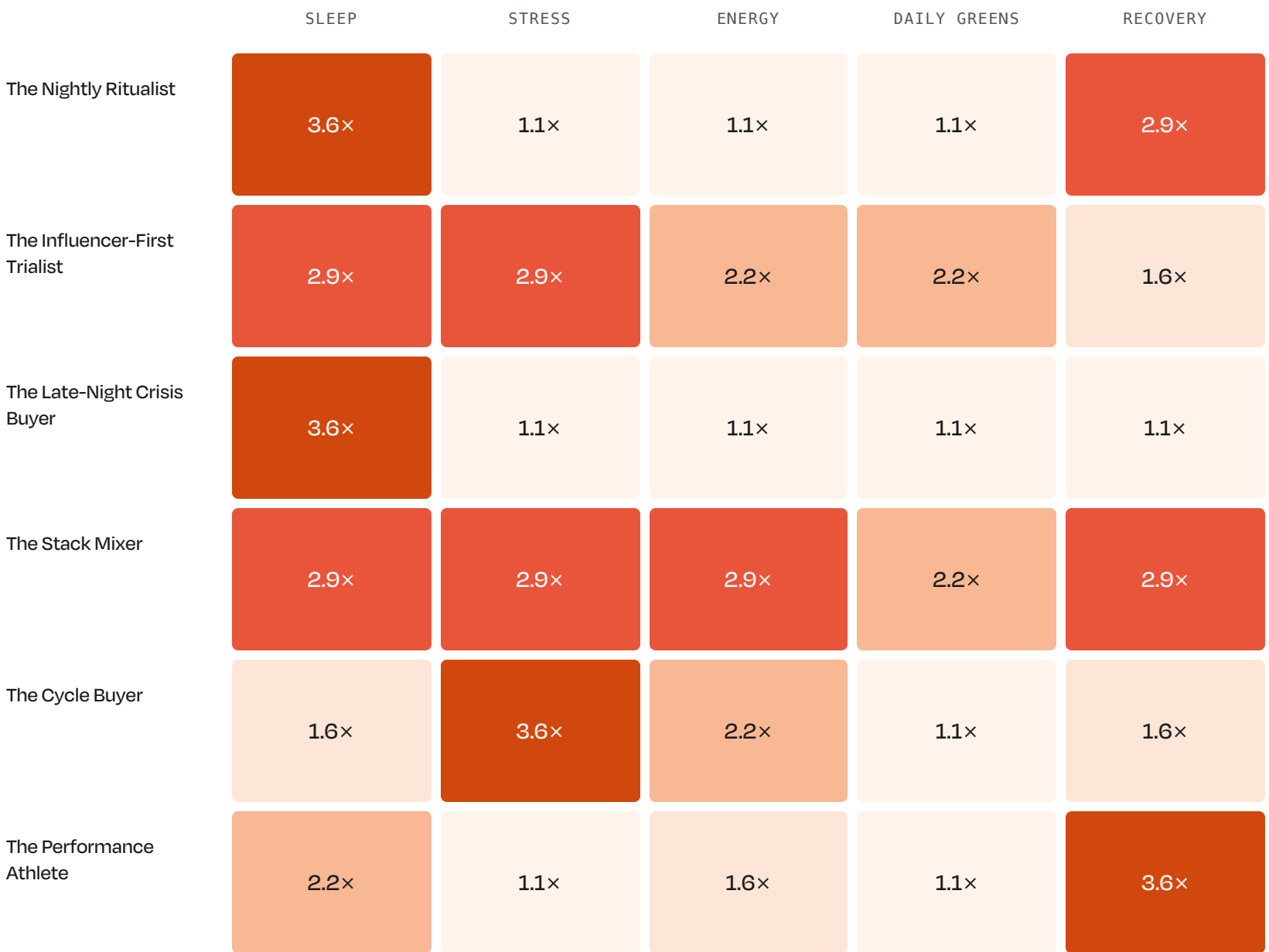
**SEND THIS FIRST**

Subscription pitch. Lowest-friction move, converts existing customers. Wholesale sequences after. Coach-and-co is a year-one bet on the next 1,000.

SECTION 03

# Cross-sell matrix.

This matrix shows which audiences buy across product categories at unexpected rates. The cells with the strongest signal, where one audience's purchase pattern in one category predicts purchases in another, are the cross-sell opportunities most brands have intuitions about but few have evidence for.



LIFT WEAK STRONG

## Top three cross-sell opportunities.



**01** Stack Mixer buys Recovery at 2.6× the rate of other groups when the order already contains Sleep. Bundle Recovery in the post-Sleep checkout. ~\$72K in 90 days at 11% AOV lift.

---

**02** Performance Athlete buys Sleep + Recovery at 3.1× baseline when the order is over \$200. Bundle them as a 'recovery night' stack at \$24 off. 14% AOV lift plus subscription pull-through.

---

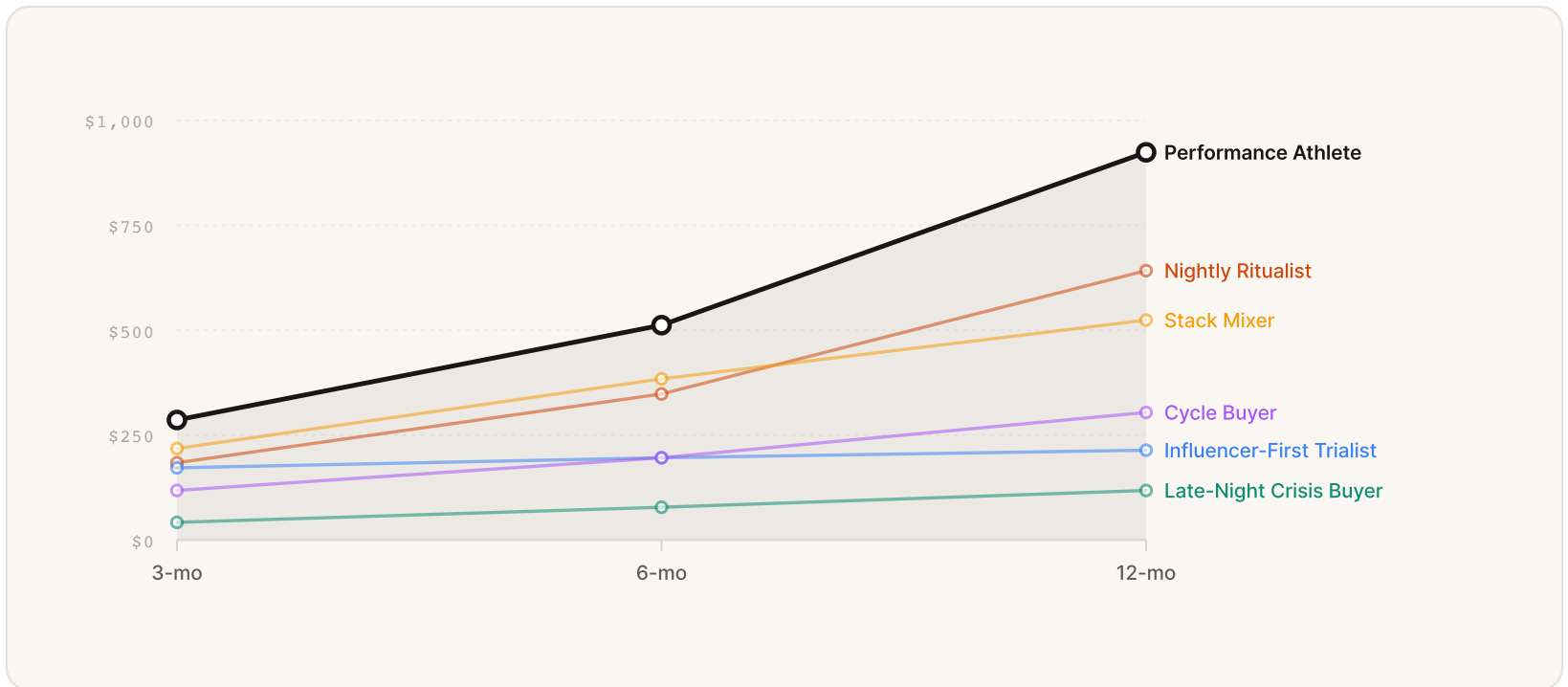
**03** Nightly Ritualist responds to Recovery cross-sells only Nov to Feb. Add Recovery as a winter recommendation in the 26-night flow. 8% AOV lift in Q4 to Q1.

SECTION 04

# Price elasticity & LTV.

## 12-month LTV projection by audience.

Cohort-based survival analysis with vertical-specific decay curves. Confidence intervals shown in the table alongside point estimates.



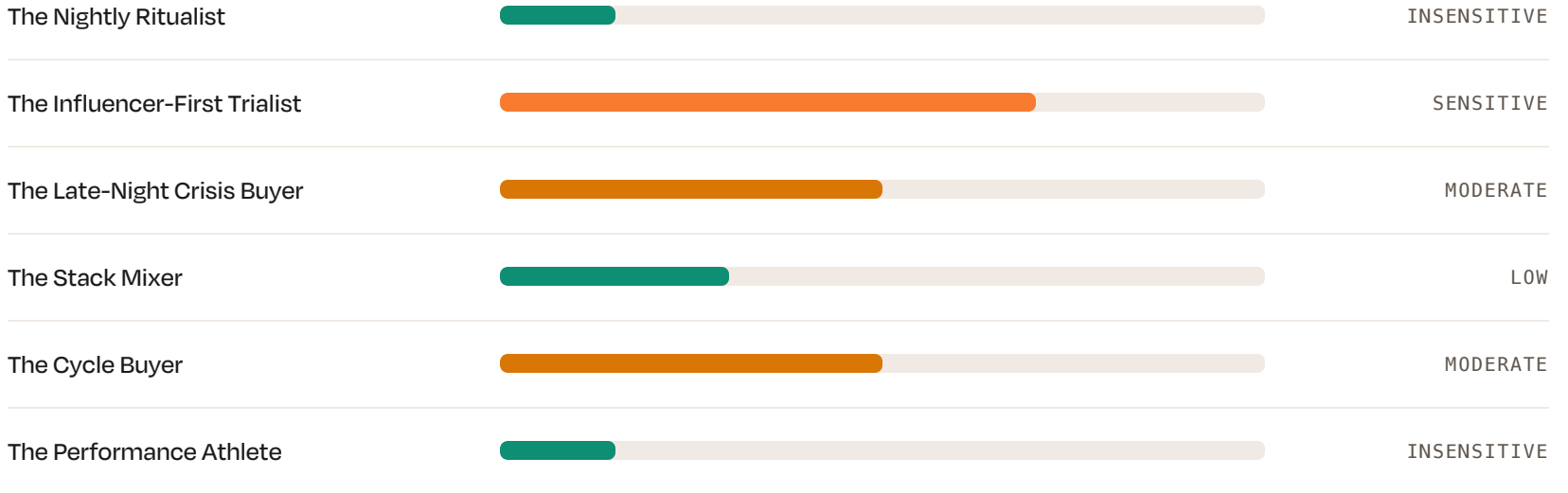
AUDIENCE	3-MONTH	6-MONTH	12-MONTH	CONFIDENCE
The Nightly Ritualist	\$184	\$348	\$642	HIGH
The Influencer-First Trialist	\$172	\$196	\$214	MEDIUM
The Late-Night Crisis Buyer	\$42	\$78	\$118	MEDIUM
The Stack Mixer	\$218	\$384	\$524	HIGH
The Cycle Buyer	\$118	\$196	\$304	MEDIUM





## Price elasticity read.

Which audiences are price-sensitive and which aren't. This determines where discounts unlock incremental revenue and where they erode margin.



## High-value cohort drill-down.

What makes your top 10% of customers different. This is the seed for the Meta lookalike work in Section 7.

FIRST PURCHASE

Sleep +  
Magnesium  
stack

TIME TO 2ND

26 days

TOP CHANNEL

Organic search

**Anti-pattern.** Top-10% customers almost never come from creator-driven traffic. Exclude TikTok and Instagram-creator-attributed orders from the Meta lookalike seed. Including them dilutes the signal by ~38% and pulls the lookalike toward one-and-done buyers.

---

**SECTION 05**

## Methodology **note.**

One page on how this analysis was produced, so the audit is defensible the first time an agency, a board member, or a new hire asks how the audiences formed.

### DATA SOURCES

Shopify order history Mar 2023 to Apr 2026 for a \$3.0M annual DTC supplement brand (9,240 customers, 31,860 orders). Klaviyo event stream Mar 2024 to Apr 2026. Meta Ads Manager Jan 2024 to Apr 2026. GA4 Jan 2024 to Apr 2026. Excluded: 286 customers with return rate >50%, 42 wholesale accounts, and 19 fraud chargebacks.

### AUDIENCE FORMATION

K-means clustering on 14 behavioral features (recency, frequency, monetary value, SKU mix, AM/PM concentration, day-of-week and hour-of-day patterns, timezone, season, email open/click/reply rate, distinct SKUs per order, return rate). Six clusters via silhouette-score elbow at k=6. Recency and hour-of-day weighted 1.6× because supplement brands carry strong rhythm signal. Excluded: customers with fewer than 2 orders or less than 30 days of history.

### CONFIDENCE & CONSERVATISM

Boundaries drawn conservatively. When in doubt, customers were assigned to the larger cluster. Audience 06 has the smallest cohort (n=620) but the tightest cohesion. Audience 03 is the largest but lowest-confidence projection because the second-purchase signal is the youngest in the data. Audience 02 LTV is volatile; treat the 12-month estimate as directional. All boundaries are re-runnable in 90 days.

---

**SECTION 06**

## The eighteen **campaigns.**

Three campaigns per audience, formatted as Klaviyo-ready email mockups. Each one shows the inbox view plus a “Behind the brief” strip with channel, timing, dependencies, and expected lift. Ranked by commercial impact, not by audience.

Hand this section to your media buyer, copywriter, or lifecycle lead. The hooks, subjects, body, and CTAs are starting points; your founder voice should overwrite them. The behavioral triggers and segment definitions in Section 07 are the load-bearing piece.

CAMPAIGN 01 · FOR THE NIGHTLY RITUALIST

#01

SUBJECT **running low on the Nightly Ritual?**  
 FROM **SpaceForm** <hi@spaceform.co>  
 TO you@yourbrand.com



## Your bottle is two scoops from empty.

By our count you're about four nights from the bottom of the bottle. The same Sleep + Magnesium pair is queued up to your usual address and ready to ship tonight if you want it. No discount code, nothing else added — just the refill on the rhythm you've been on.

[Send my refill](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

- CHANNEL Email only. Triggered at night 22 post-purchase.
- TIMING Behavioral trigger. Sent 7pm Pacific.
- DEPENDS ON Klaviyo segment built. Replenishment flow configured. Inventory in stock.
- EXPECTED LIFT **24% recovery of the ~16% who churn between cycles. ~\$71K in 90 days.**

CAMPAIGN 02 · FOR THE PERFORMANCE ATHLETE

#02

SUBJECT **the 5-week kit, on auto-ship**  
 FROM **SpaceForm** <hi@spaceform.co>  
 TO you@yourbrand.com



## Auto-ship every 5 weeks. Skip when you don't need it.

You go through the 90-count Recovery + Magnesium kit in about five weeks. We can put it on a 5-week auto-ship: 14% off per bottle, skip any month from your account, cancel in two clicks. We won't follow up either way — just leaving the option here.

[Set up auto-ship](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

CHANNEL	Email + SMS at week 3 from last purchase.
TIMING	Behavioral trigger.
DEPENDS ON	Klaviyo flow. Subscription product configured with skip/pause UX.
EXPECTED LIFT	32% subscription conversion. ~\$18K MRR in 6 months, \$216K annualized.

CAMPAIGN 03 · FOR THE STACK MIXER

#03

SUBJECT we built the stack builder you've been trying to use  
 FROM SpaceForm <hi@spaceform.co>  
 TO you@yourbrand.com



## Build your morning + night stack. We'll ship it the way you built it.

Your last few orders had four bottles, then three, then four again. A lot of you do the same thing. So we built the AM/PM stack page: drag in what you actually take morning and night, save the layout, ship it the way you laid it out. Save the layout so you're not rebuilding it every month.

[Build a stack](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

- CHANNEL Email + on-site PDP banner + one Reels video.
- TIMING Launch send + always-on PDP placement.
- DEPENDS ON Configurator built. AM/PM SKU taxonomy. Front-end 1.5 weeks.
- EXPECTED LIFT 14% AOV on the group. Configurator URL outranks the PDP within 60 days on 4+ long-tail queries.

CAMPAIGN 04 · FOR THE CYCLE BUYER

#04

SUBJECT the spring stack — first Monday of March  
 FROM SpaceForm <hi@spaceform.co>  
 TO you@yourbrand.com





## It's the first Monday of March. Your stack is ready.

Last March you ordered the Stress + Ashwagandha pair on the 4th. The cycle's about to repeat, so the same stack is in stock and held for you. Same address. No discount, no extra steps — just the order you'd be placing in two weeks anyway.

[Restock the spring stack](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

CHANNEL	Email only.
TIMING	First Monday of March + first Monday of September.
DEPENDS ON	Klaviyo segment with seasonality flag. Calendar automation. Inventory check 2 weeks prior.
EXPECTED LIFT	<b>28% conversion on the group that opens it.</b>



CAMPAIGN 05 · FOR THE LATE-NIGHT CRISIS BUYER

#05

SUBJECT **why melatonin makes you groggy**  
 FROM **SpaceForm** <hi@spaceform.co>  
 TO you@yourbrand.com



## What's happening when you can't sleep. Five short emails.

First of five short reads. No buy button, no discount — just what melatonin actually does to your sleep, why so many people wake up fuzzy on it, and what tends to work better. Three minutes. The next four emails build on this one.

[Read it](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

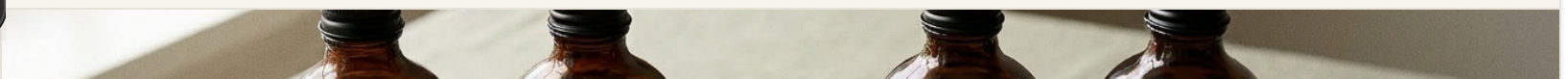
### BEHIND THE BRIEF

CHANNEL Email only. Triggered on first Sleep-only order.  
 TIMING Day 0 through Day 30.  
 DEPENDS ON Five long-form educational emails. Klaviyo flow. Founder voice approved.  
 EXPECTED LIFT **18% second-purchase rate (vs current 11%).**

CAMPAIGN 06 · FOR THE STACK MIXER

#06

SUBJECT **a subscription that doesn't make you commit to all of it**  
 FROM **SpaceForm** <hi@spaceform.co>  
 TO you@yourbrand.com





## Stack-Ship: pick the bottles, pick the schedule per bottle.

Most subscriptions ship every bottle on the same schedule. Stack-Ship lets you set the schedule per bottle, pause one without touching the others, and change the lineup from your account whenever. You don't run out of everything on the same day, so the auto-ship shouldn't pretend you do.

[Set up Stack-Ship](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

CHANNEL	Email + on-site banner + checkout option.
TIMING	Launch send + always-on at checkout.
DEPENDS ON	Per-SKU subscription cadence in Shopify. Back-end 3 weeks.
EXPECTED LIFT	19% subscription conversion (vs current 4%). \$14K MRR in 6 months.

CAMPAIGN 07 · FOR THE NIGHTLY RITUALIST

#07

SUBJECT **we finally named the pair**  
 FROM **SpaceForm** <hi@spaceform.co>  
 TO you@yourbrand.com



## The SpaceForm Nightly Ritual.

Internally we've been calling the Sleep + Magnesium pair 'the Nightly Ritual' for almost two years. Customers kept naming it that back to us in reviews. So we made it official this week. Same two bottles, same formula — now with a name that matches what it's actually been doing.

[See the ritual](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

- CHANNEL Email + on-site copy + paid social.
- TIMING Always-on. Updated quarterly.
- DEPENDS ON Creative produced. Copy approved. PDP refresh.
- EXPECTED LIFT 11% adoption among Sleep-only buyers. ~600 customers into the two-stack annually.

CAMPAIGN 08 · FOR THE PERFORMANCE ATHLETE

#08

SUBJECT **wholesale pricing for coaches & gyms**  
 FROM **SpaceForm** <hi@spaceform.co>  
 TO you@yourbrand.com



## For coaches, gyms, training collectives.

If you're recommending SpaceForm to athletes you coach, you shouldn't be paying retail. 25% off MSRP with NET-30 terms, free shipping over \$400, no minimum on the first order. Sign once, get a price sheet by Friday, order whenever your shelf is empty. Reply to this email if it's easier to talk it through.

[Apply for wholesale](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

CHANNEL	Outbound email + LinkedIn + cold call.
TIMING	90-day sales motion.
DEPENDS ON	Wholesale program built. Pricing tiers set. ~0.5 FTE account management.
EXPECTED LIFT	20 to 30 wholesale accounts in 90 days. 3x consumer AOV.



CAMPAIGN 09 · FOR THE INFLUENCER-FIRST TRIALIST

#09

SUBJECT **how'd it actually work out?**  
 FROM **SpaceForm** <hi@spaceform.co>  
 TO **you@yourbrand.com**



## Send us your morning shelf. 20% off your refill.

Six weeks since the order shipped. We watched it leave — we don't know what happened next. If the bottles are still around, send us a photo of where they ended up (counter, nightstand, gym bag, wherever) and we'll send a 20% code for the refill. We sometimes ask if we can use the photo on the site too, but that's optional.

[Send a photo](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

CHANNEL Email + Instagram DM via Klaviyo.  
 TIMING 45 days post-purchase.  
 DEPENDS ON Klaviyo flow. UGC submission landing page.  
 EXPECTED LIFT 9 to 12% reactivation. ~\$18K in creator-equivalent paid cost.

CAMPAIGN 10 · FOR THE LATE-NIGHT CRISIS BUYER

#10

SUBJECT **the second half of the protocol**  
 FROM **SpaceForm** <hi@spaceform.co>



## Sleep was the first half. Magnesium is the rest of the protocol.

You're five emails into the Sleep Reset. By now you know more about why melatonin doesn't work than most people in your zip code. The next move is Magnesium glycinate alongside the Sleep tincture you already have — same protocol the emails walked through. Not an upsell. Just the part nobody told you was missing.

[Add the Magnesium](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

CHANNEL	Email + on-site PDP banner.
TIMING	Day 35 trigger.
DEPENDS ON	30-day onboarding flow must precede.
EXPECTED LIFT	14% conversion to a two-SKU second order. Moves the group toward Audience 01 economics.



CAMPAIGN 11 · FOR THE STACK MIXER

#11

SUBJECT **read your review this morning**  
 FROM **SpaceForm** <hi@spaceform.co>  
 TO you@yourbrand.com



## Hey — read your review this morning.

Hey — Maya here. Read your review on the Sleep tincture on the way into the office. Based on the 4 a.m. wake-ups you mentioned, what I'd actually try is the Magnesium glycinate at the same time you take the tincture, not the L-theanine. Wrote this myself, no automation in the loop. Tell me how it goes.

[See the rec](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

- CHANNEL Email + ops process (0.25 FTE).
- TIMING Review submission, sent within 48 hours.
- DEPENDS ON Review platform integration. Customer-service capacity.
- EXPECTED LIFT **8% additional repeats. 22% longer reviews. Compounds organic acquisition over 12 months.**

CAMPAIGN 12 · FOR THE INFLUENCER-FIRST TRIALIST

#12

SUBJECT **what's changed since spring?**  
 FROM **SpaceForm** <hi@spaceform.co>  
 TO you@yourbrand.com





## What's different since the last order?

Last spring's stack might not be what fits this fall. New job, new training block, returning to the office, a kid that finally sleeps through the night — life events change what your body's actually asking for. Tell us what's different and we'll send back the routine that fits where you are now, not where you were in June.

[Tell us what changed](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

CHANNEL	Meta + TikTok.
TIMING	Behavioral trigger from life-event signal.
DEPENDS ON	Meta CAPI. Lookalike audience built from Audience 04 (not 02).
EXPECTED LIFT	<b>13% conversion on warmest 25%.</b>

CAMPAIGN 13 · FOR THE CYCLE BUYER

#13

SUBJECT **the next cycle starts in 10 days**  
 FROM **SpaceForm** <hi@spaceform.co>  
 TO **you@yourbrand.com**



## Day 80. You'll want to restock before the next one starts.

If your spring stack is doing its job, you've got about a week and a half left in the bottle. The June cycle starts the first Monday — restocking now means the next round lands on the doorstep before you run out. Same stack, same address. Reply with a date if you'd rather we pushed the ship a few days.

[Restock for June](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

- CHANNEL Email + SMS for opted-in.
- TIMING Day 80 trigger.
- DEPENDS ON Klaviyo cycle tracking. SMS list health.
- EXPECTED LIFT Pulls forward ~16% of next-cycle revenue.

CAMPAIGN 14 · FOR THE PERFORMANCE ATHLETE

#14

SUBJECT **thirty paid coach partnerships — applications open**  
 FROM **SpaceForm** <hi@spaceform.co>  
 TO **you@yourbrand.com**



## Coach-and-co: 30 coaches, real stipends, real content.

Real stipends, \$1,200 per quarter, not affiliate codes. SpaceForm sends the supplements; you write about how you actually use them. Athletes you coach get a 20% code. You keep editorial freedom on the content. Apply by July 15, hear back by July 30. Reply if you want to talk through fit before applying.

Apply

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

CHANNEL	Outbound + landing page + coaches-only newsletter.
TIMING	Year-1 launch program.
DEPENDS ON	\$144K annual budget. Coach selection process. Content guidelines.
EXPECTED LIFT	<b>9% net-new acquisition in coach geographies. Compounds over years.</b>

CAMPAIGN 15 · FOR THE LATE-NIGHT CRISIS BUYER

#15

SUBJECT **how to sleep without melatonin (1,800 words)**  
 FROM **SpaceForm** <hi@spaceform.co>  
 TO **you@yourbrand.com**



## How to sleep without melatonin. 1,800 words.

We wrote the article we wish had been online at 1 a.m. last winter. What melatonin actually does, why it backfires for so many people, what works instead, and how to tell within two weeks whether the change is helping. Free to read, no email gate, no buy button.

[Read it](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

- CHANNEL           Organic + brand search.
- TIMING            90-day content sprint, then always-on.
- DEPENDS ON      Senior writer for 60 days. SEO operator. Founder review on science claims.
- EXPECTED LIFT    22% increase in non-brand acquisition from this profile over six months. Compounds.

CAMPAIGN 16 · FOR THE CYCLE BUYER

#16

SUBJECT **(no send: audience suppressed)**  
 FROM **SpaceForm** <hi@spaceform.co>  
 TO **you@yourbrand.com**

NO SEND · AUDIENCE SUPPRESSED

This isn't an email. It's the campaign that says don't send. The Cycle Buyer group goes quiet for 60 days between cycles by design. Mailing them in those quiet months is what burns the list. Suppress, then re-engage with the cycle re-warm.

BEHIND THE BRIEF

CHANNEL	Klaviyo audience exclusion rule.
TIMING	Always-on.
DEPENDS ON	Klaviyo segmentation. Marketing-ops sign-off.
EXPECTED LIFT	<b>~21% reduction in unsubscribe over six months. Protects the list.</b>



CAMPAIGN 17 · FOR THE INFLUENCER-FIRST TRIALIST

#17

SUBJECT **give a friend \$20, get \$20**  
 FROM SpaceForm <hi@spaceform.co>  
 TO you@yourbrand.com



## Give a friend \$20. Get \$20.

Your code's below. Share it with someone you'd actually recommend SpaceForm to — they get \$20 off their first order, you get \$20 in store credit when theirs ships. The credit shows up in your account; spend it on whatever you'd buy next.

[Copy my code](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

CHANNEL Email + SMS.  
 TIMING Always-on at 90 days post-first-order.  
 DEPENDS ON Referral codes. Klaviyo flow.  
 EXPECTED LIFT **7% net-new acquisition from existing list.**

CAMPAIGN 18 · FOR THE NIGHTLY RITUALIST

#18

SUBJECT **the Nightly Ritual, paid once for the year**  
 FROM SpaceForm <hi@spaceform.co>  
 TO you@yourbrand.com





## An annual subscription. One charge. Twelve months.

\$899 covers twelve months of the Sleep + Magnesium pair at 18% off per bottle — works out to about \$74 a month for the routine you're already on. One charge in June, the bottles ship every 26 nights for the next year. We won't pitch this again until next June.

[Lock in 12 months](#)

SpaceForm · 42 Orbit Ave · Austin, TX

[Unsubscribe](#) · [Update preferences](#)

### BEHIND THE BRIEF

CHANNEL	Email + landing page.
TIMING	Single pitch in week 4 of every year.
DEPENDS ON	Annual subscription product in Shopify. Customer-success process for cancellations.
EXPECTED LIFT	<b>22% conversion on the eligible group. \$260K committed revenue.</b>

— SECTION 07

# Klaviyo + Meta exhibits.

This is the answer to the spend question. Three lookalike seeds drawn from your highest-LTV groups, Klaviyo segments for the retention work, and expected performance ranges anchored to your historical data. Forward these pages to your media buyer.

## Expected campaign performance, by audience.

AUDIENCE	OPEN	CTR	CONV.	TRIGGER
The Nightly Ritualist	41–47%	5–7%	9–13%	Behavioral
The Stack Mixer	36–42%	4–6%	9–13%	On stack-config follow-up
The Performance Athlete	11–15%	2–3%	28–34% (subscription)	Behavioral
The Cycle Buyer	34–40%	5–7%	18–24%	Calendar (Mar / Sep)
The Influencer-First Trialist	38–44%	6–8%	3–5%	Day 45 post-purchase
The Late-Night Crisis Buyer	21–27%	3–5%	14–18%	Day 35 post-purchase

Performance ranges are anchored to the brand's historical data, not generic benchmarks. The single-source benchmark file is in the execution artifacts package.



## Meta lookalike: seed file specification.

One CSV per top audience. Drop into Ads Manager → Custom Audience → Customer List. Then create a 1% US lookalike against each. The exclusion column is the important part. It's what keeps Meta pulling toward Audience 01 economics instead of Audience 02.

```
# meta-lookalike-spaceform-2026-06/seed-nightly-ritualist.csv
# columns
email, phone_number, first_name, last_name, city, state, postal_code, country, lifetime_value,
last_order_date, ltv_band, exclusion_flag

# rows (1,120 total – 3 shown for reference)
m.alvarez@redacted.com, +14155550182, Marisol, A., Oakland, CA, 94611, US, 642.00, 2026-06-06, "high",
false
e.boudreau@redacted.com, +13105550114, Elise, B., Santa Monica, CA, 90402, US, 728.50, 2026-06-04,
"high", false
j.hsu@redacted.com, +12065550161, Joanne, H., Bellevue, WA, 98004, US, 596.00, 2026-05-29,
"mid", false
...

# exclusion rules baked into the file:
# – any row with attribution = "tiktok-creator" or "instagram-creator" → exclusion_flag=true
# – any row with first-order-only = true → exclusion_flag=true
# upload the file as-is. Meta will skip the exclusion_flag rows automatically when this column is
# mapped to the "Customer Value" exclusion field.

# expected audience size after lookalike: ~1.6M US accounts at 1%, ~3.2M at 2%.
# the 1% pull is the one to spend against. the 2% is for upper-funnel reach.
```

## Why these three audiences and not the others.

Audience 01 (Nightly Ritualist) has the strongest LTV and the cleanest behavioral signal. Audience 04 (Stack Mixer) carries the heaviest baskets and is the natural subscription cohort. Audience 06 (Performance Athlete) is sticky and has the wholesale upside. The other three are weaker fits: Influencer-First and Late-Night Crisis have lower LTV, and Cycle Buyer is too seasonal for Meta to model cleanly. Run those through Klaviyo instead.

---

**SECTION 08**

## Execution artifacts.

Three packages ship alongside this PDF. Together they cover everything your team needs to start running campaigns on Monday.

### Package 1 — Klaviyo segments

Three CSVs ready to import into Klaviyo. One per top audience.

`klaviyo-segments-spaceform-2026-06.zip`

---

### Package 2 — Meta lookalike seeds

Three seed lists drawn from your highest-LTV cohorts. Drop into Ads Manager and run as variant against your generic LAL.

`meta-lookalikes-spaceform-2026-06.zip`

---

### Package 3 — Campaign mockups + briefs

The eighteen email mockups from Section 6 plus their behind-the-brief specs, exported as individual one-page PDFs your team can attach to project tickets or paste into Klaviyo as starting drafts.

`campaign-briefs-spaceform-2026-06.zip`

---

## How to import.

**Klaviyo** → Audiences › Lists & Segments › Create List/Segment › Import. Map the `email` column to Klaviyo's primary key. Allow ~10 minutes to sync.

**Meta** → Ads Manager › Audiences › Create Audience › Custom Audience › Customer List. Upload CSV. Then Create Lookalike › 1% › US.

---

**SECTION 09**

# How to **use** this document.

This audit pays back over 30 days, not in one sitting. Here's the read pattern teams have got the most out of so far.

## DAY 1 · THE FOUNDER READS IT

Read Section 1 (headline). Skim Section 2 (audiences). Block 30 minutes. Don't try to absorb everything — the document is structured for repeat visits.

## DAY 2 · FORWARD TO HEAD OF GROWTH

They'll go deeper into Sections 2, 3, and 4. The cross-sell matrix and LTV projections are where they live.

## WEEK 1 · MEDIA BUYER WORKS FROM SECTION 6

Each brief is self-contained — they don't need to read the rest of the document.

## WEEK 2 · IMPORT THE SEGMENTS AND SEEDS

Section 8 walks through Klaviyo CSV import and Meta lookalike upload. Once imported, the campaigns from Section 6 are buildable.

## MONTH 1 · SHIP 3–5 CAMPAIGNS

Start with the highest-ranked briefs. Track lift against expected estimates. Pay attention to the anomalies; they're where the model and reality have diverged.

---

**SECTION 10**

## Honest limitations.

What the audit couldn't tell you, and what it would take to get there.

### WHAT THE DATA COULDN'T SEE

Brand-perception drivers (why customers chose SpaceForm over Beam, Moon Juice, or AG1) aren't visible in transactional data. In-store behavior at Erewhon and regional Whole Foods accounts is out of scope. Word-of-mouth attribution is approximate. Influencer attribution beyond explicit creator-code redemption is partial.

### WHERE CONFIDENCE IS LOWER

Audience 06 (Performance Athlete) has the smallest cohort (n=620), so the wholesale revenue projection is directional rather than committed. Audience 02 (Influencer-First) LTV is volatile; the cohort came from a tight creator burst and hasn't aged into the second purchase that anchors a 12-month projection. Audience 03 (Late-Night) has the largest n but the youngest behavioral data, and the 30-day Sleep Reset has no prior performance to benchmark against.

### RECOMMENDATIONS FOR FOLLOW-UP

Three follow-ups worth running next. A quarterly audience refresh once this audit ships, because cohorts drift. A creative-attribution study tying ad creative to audience conversions so the lookalike seed has a defensible filter. A retention deep-dive on Audience 04 (Stack Mixer); there may be a \$570K segment hiding inside this \$3M brand, and Stack-Ship is how you'd test it.

---

**SECTION 11**

## Analyst sign-off.

If this were my brand I'd ship the 26-night replenishment reminder Wednesday morning. Easiest call in the audit, roughly \$71K over 90 days on conservative math, one Klaviyo trigger. Build the segment Tuesday, write the one-CTA email Wednesday morning, ship by noon. Everything else gets sequenced after.

In 30 days I want to know whether the replenishment campaign landed at the expected open rate (41 to 47%). If yes, the model and reality align and the rest of the audit is trustworthy: ship campaigns 2 through 5 the same week. If the open rate is below 33%, the segment definition needs another look. The answer determines whether the next 60 days are execution or re-analysis. Either way, I'll be around to think through implementation.

# — Cody Robertson

FOUNDER & ANALYST, PERSONA LM · JUNE 18, 2026

Questions about anything in this case study? Reply to [cody@persona-lm.com](mailto:cody@persona-lm.com) or book a call from the landing page.  
The audit only pays back if you act on it, so I'm happy to think through implementation with your team.

SpaceForm · PLM Customer Activation Map

p. 35



