

PROJECT 1

PERSONALIZATION

Improving the ability for customers to use dynamic content in their messaging through the editors by redesigning the UI for personalization options.

Overview

Multiple iterations of enabling users to easily add personalized, dynamic content to their messaging.

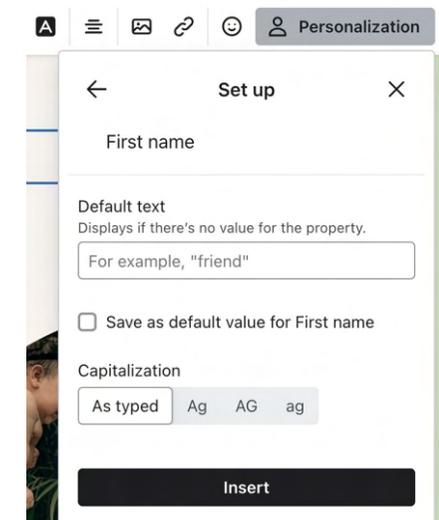
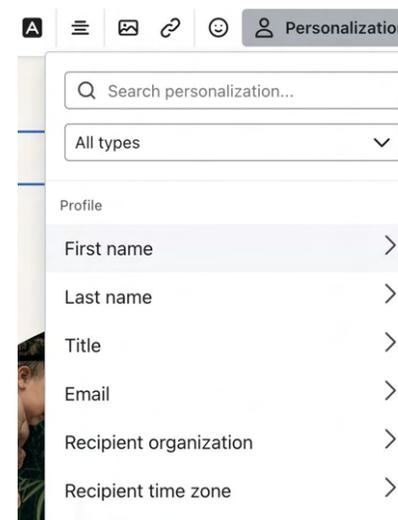
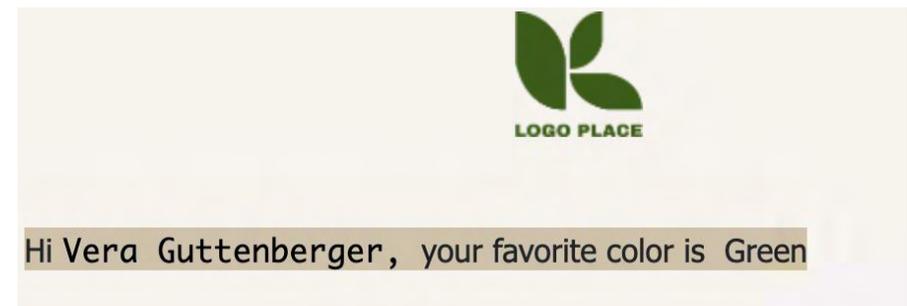
PROBLEM

Personalization is a vital part of messaging, as messages with personalization perform significantly (~40%) better than those without.

Users want to personalize their messaging (email and SMS) content to their audience, but doing so effectively requires knowledge of Django syntax. Users often get stuck because they do not know where to begin, or don't know the correct syntax to use - making personalization a cumbersome and time-consuming process.

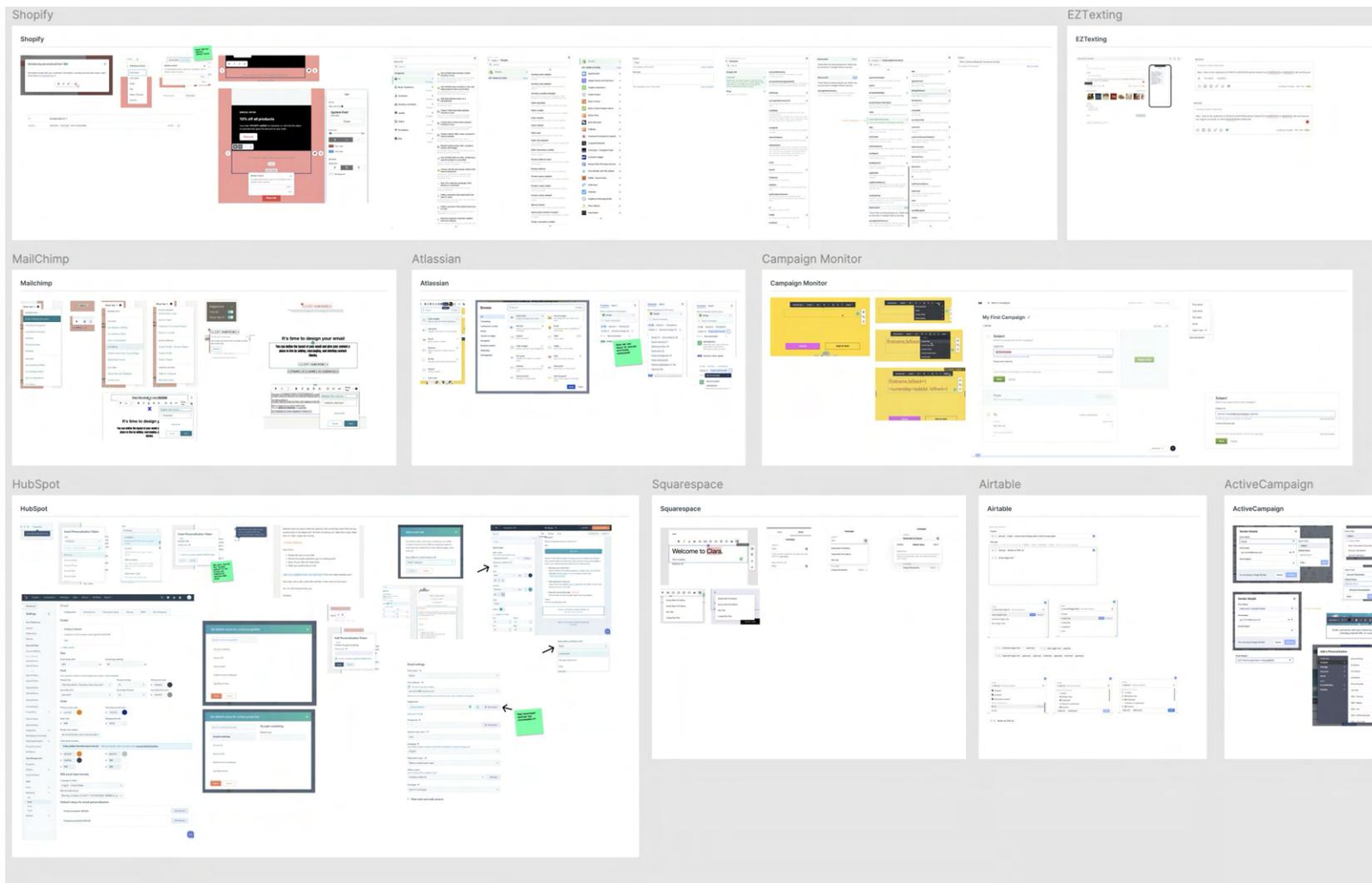
SOLUTION

Introduce an easy-to-use personalization menu that enables users to add dynamic content such as profile, event, organization, and custom properties.



Competitive Analysis

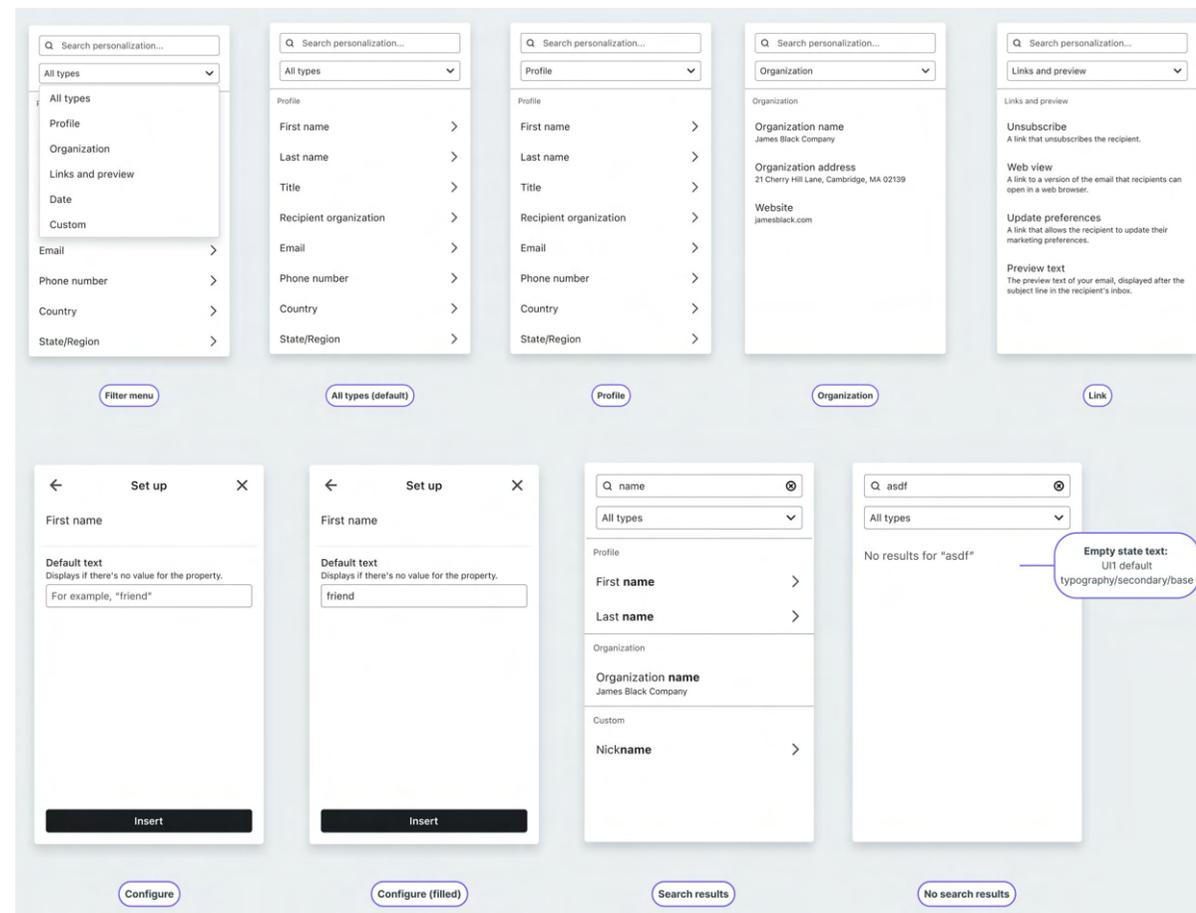
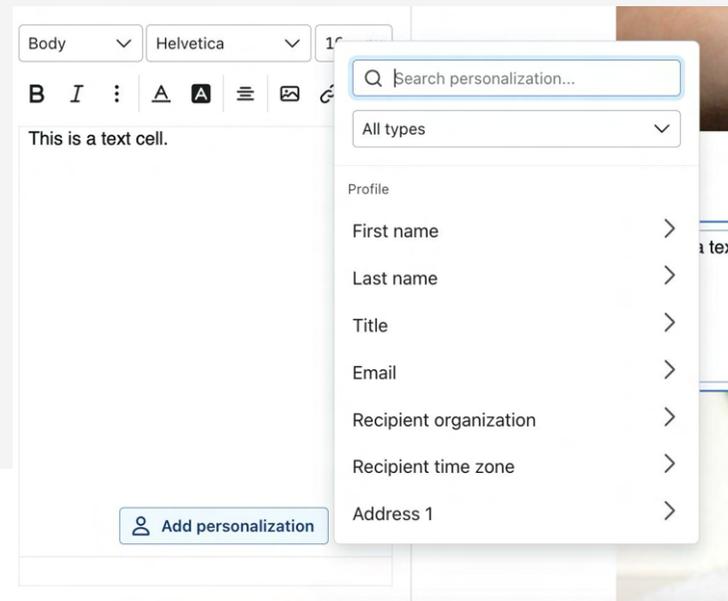
Research how competitors and other companies handle personalized content.



V1

Introducing the personalization menu

- Making the personalization menu **discoverable**
- Making the menu **organized and easy to use** through labels, descriptions, and categorization
- Including **the most commonly used properties**
- Creating a better experience to input a **default value**



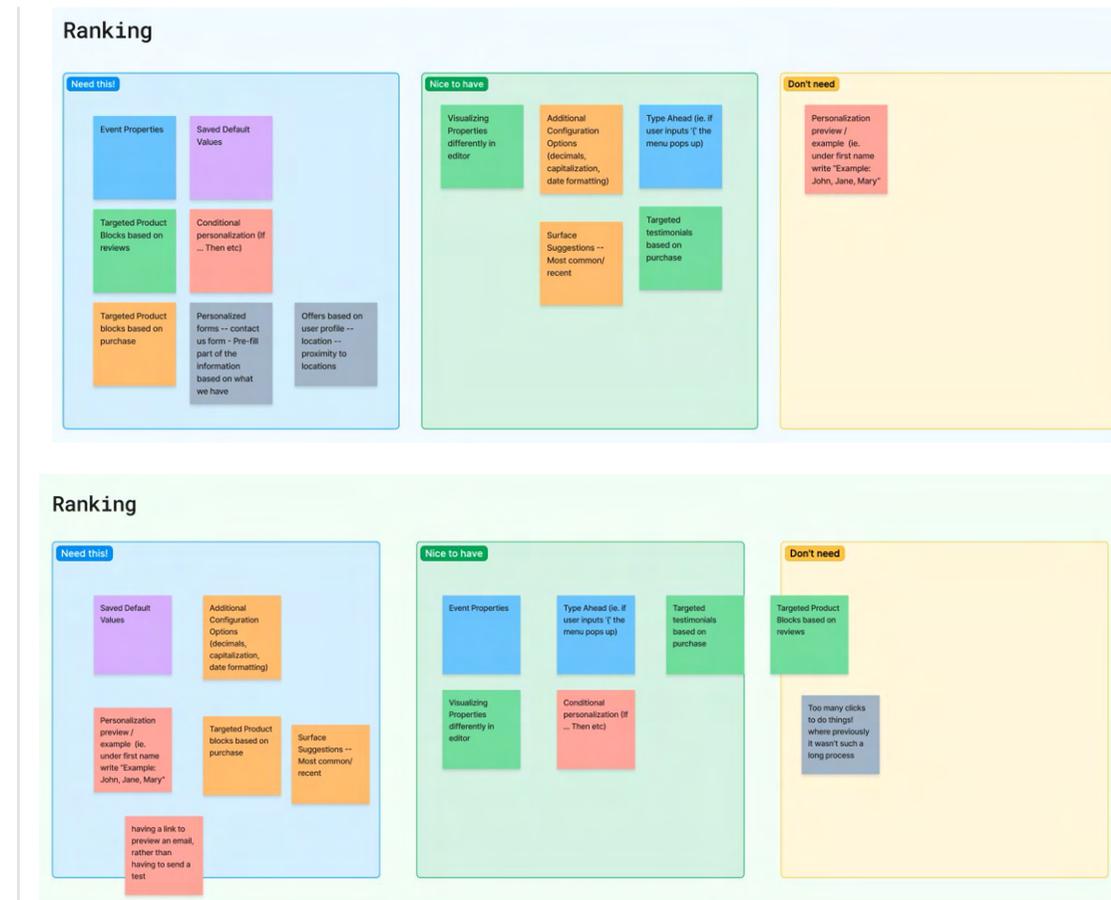
10 user calls with Klaviyo customers of different size - ranging from entrepreneur to mid-market+

User Research

Conduct user interviews and concept test to gain a better understanding of key uses of dynamic content and our user's expectations on how to implement it.

PLAN

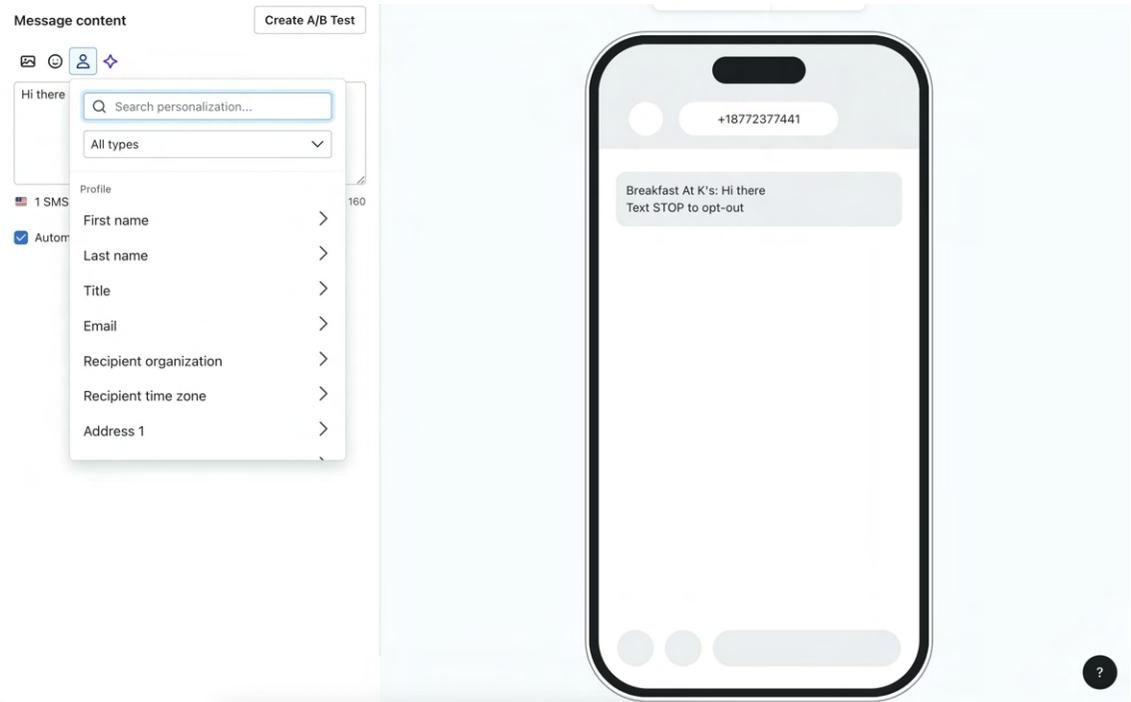
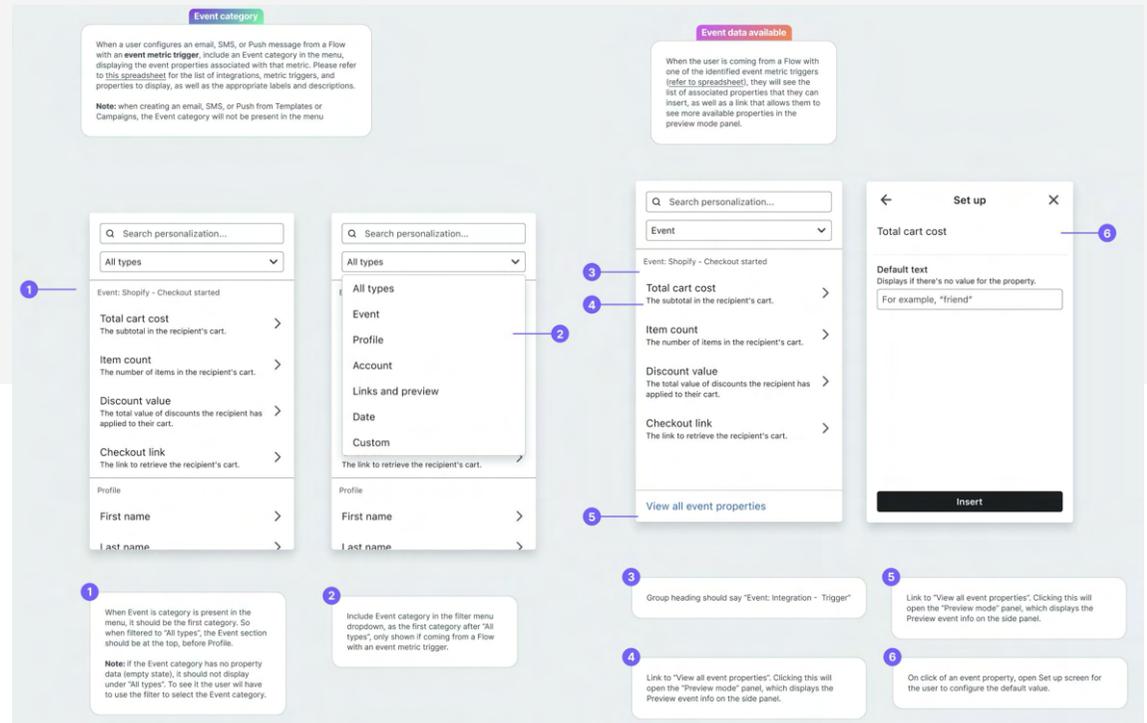
- ✓ **Intro**
Business and role, experience with the email editor, understanding of personalization.
- ✓ **Dynamic Content Questions**
What does dynamic content mean to you, do you use it and how, how would you expect Klaviyo to help you with it.
- ✓ **Concept Testing**
Expectation when clicking the Personalization menu, what do the options mean, overall thoughts on the experience.
- ✓ **Ranking activity**
Look through and rank the potential new features.



V2

Improvements to the personalization menu based on user feedback

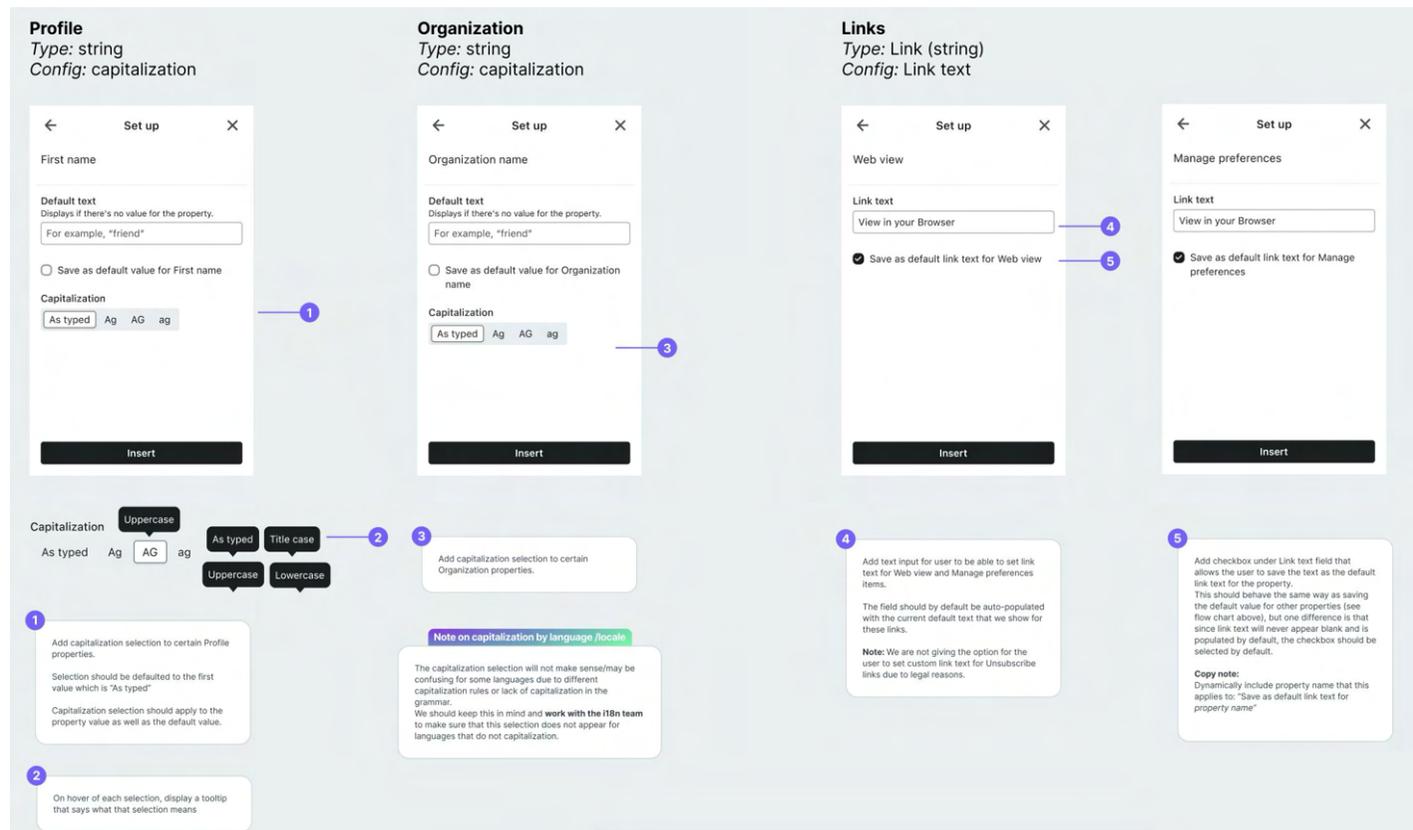
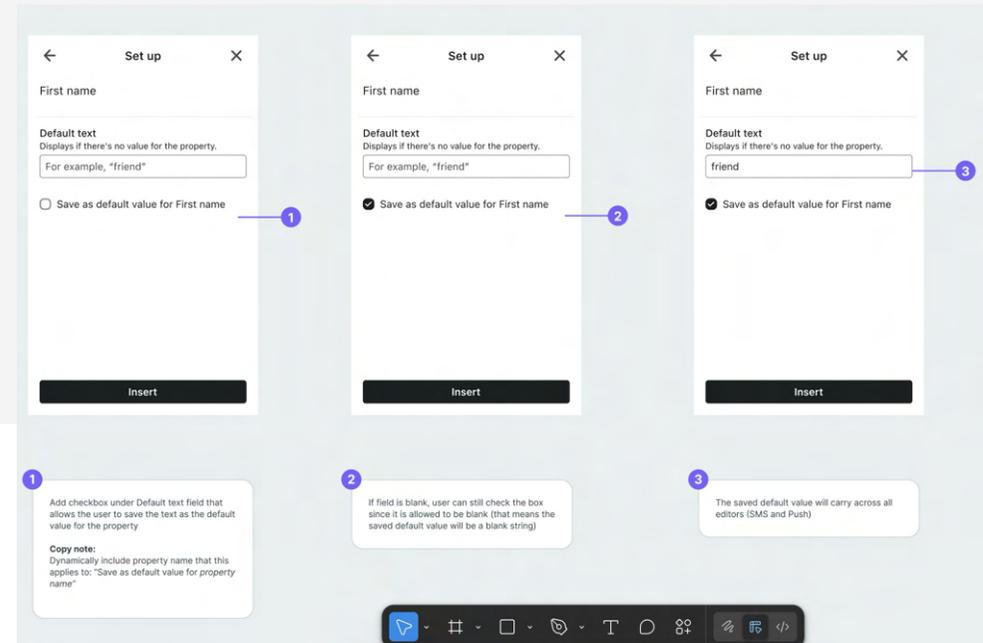
- Adding **event data** to the personalization menu
- Adding the personalization menu to the **SMS and Push editors**
- Improving **discoverability** through in-app guidance



V3

Additional improvements to the personalization menu based on user feedback

- Ability to **save default value** for future use
- Property **configuration options**: capitalization, link text, date format



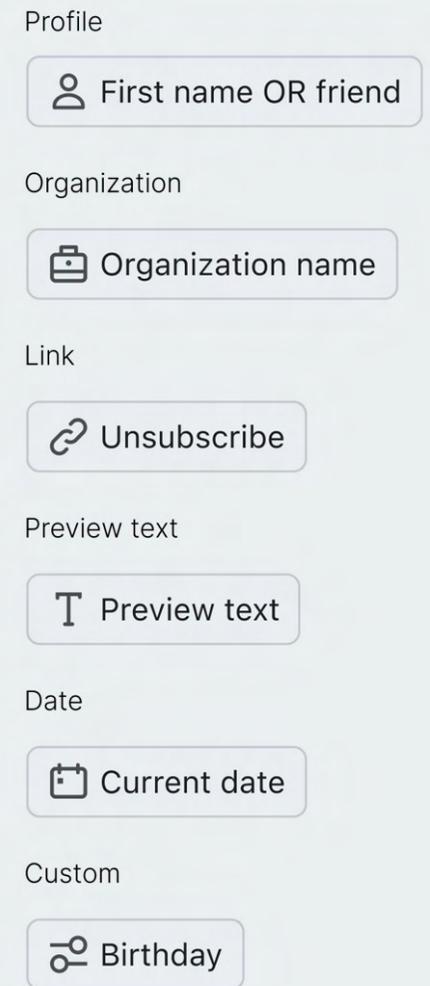
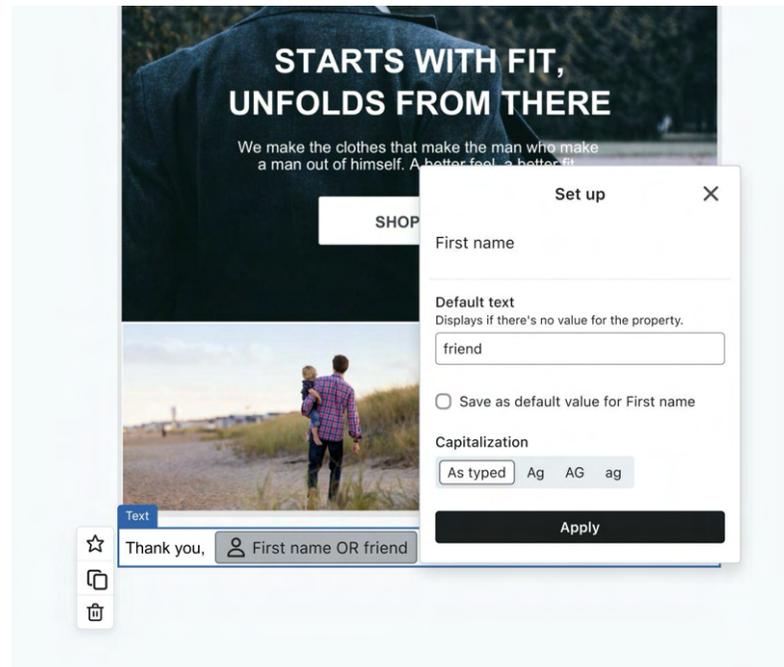
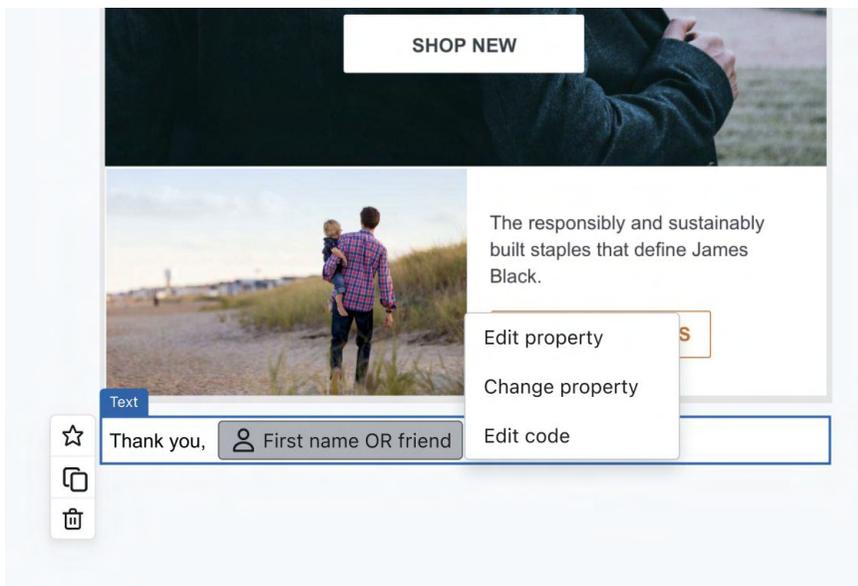
Current: syntax in the canvas

V4

Tag visualization in the canvas



Replace syntax in the canvas with a more user friendly visualization. Through this visualization, users will also be able to edit, replace, and see code for the properties through a user-friendly UI.



Handoff and Outcomes

Handoff process for design and engineering + post-release outcomes

DESIGN REVIEW

Design review before engineering handoff includes review by lead researchers, content team, design systems, and leads (manager, pillar lead, VP).

ENGINEERING HANDOFF

An annotated file, prototypes, and a meeting to review product specifications and walk through final designs with the engineering team.

RELEASE PLAN

- Work with tech writers on updating help documentation
 - 30-60-100 release
 - Collect NPS and user feedback
 - Prioritize features for future iterations
-

POST -RELEASE OUTCOMES

- Marked decline in Django-related support tickets
- Marked increase in customers using dynamic content in their emails
- Positive qualitative user feedback

PROJECT 2

EDITOR LIBRARY CONVERSION

Massive overhaul of our editor-specific component library and code.

Overview

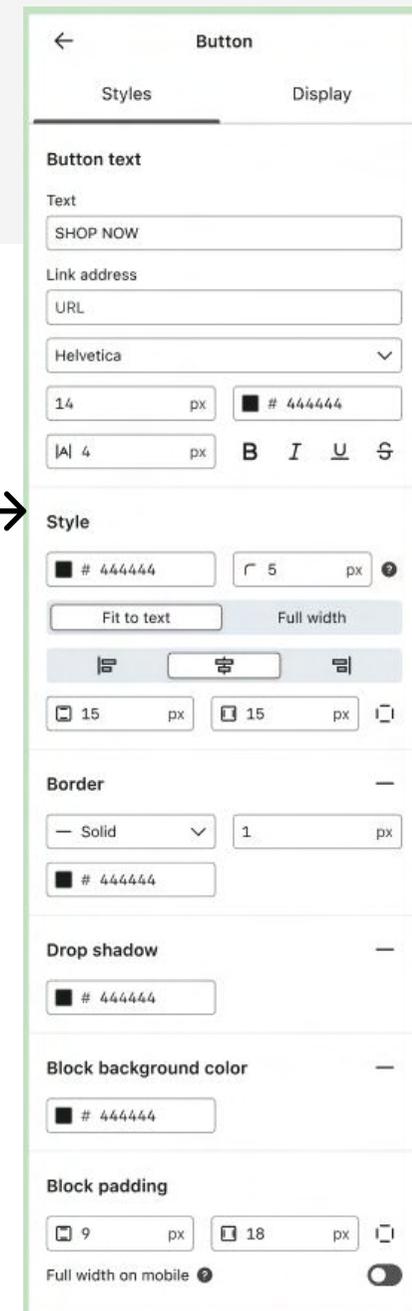
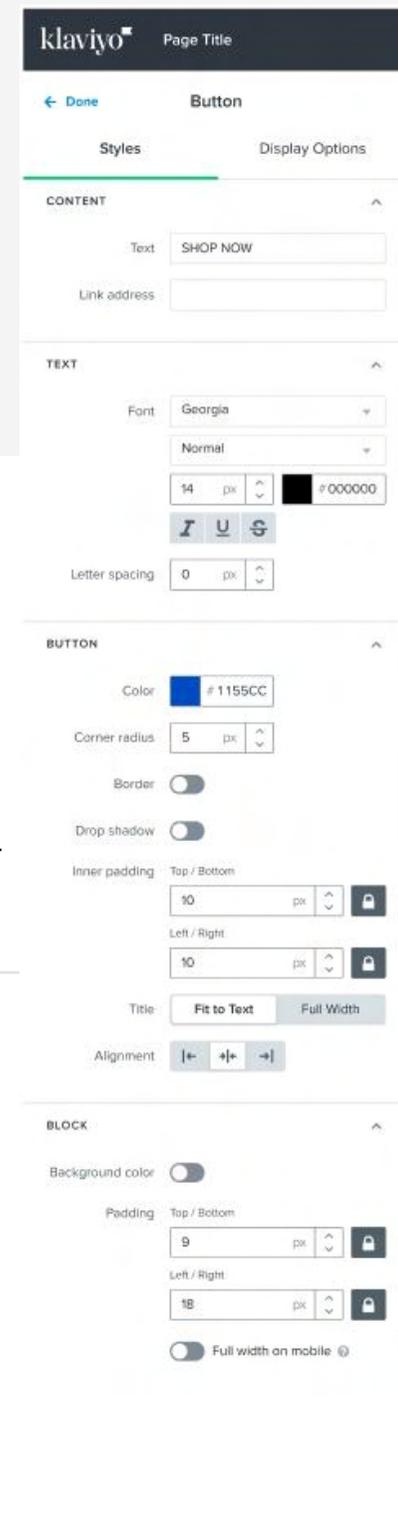
Overhauling the components throughout our email template editor.

PROBLEM

The components used throughout our email template editor are extremely outdated legacy designs and code. When we introduced our Ascent design system a couple years ago and began converting our product - the email editor was overlooked as many of the components needed were not readily available in the new design system. This led to a very inconsistent and sub-par user experience, as well as bugs that come with old code.

SOLUTION

We created an “Editor Library” as a subset of our Ascent design system. This task was essentially creating a “mini” design system specifically for editors’ use. I worked with the design system team to design new components (atoms → molecules → organisms → templates) and interactions, and created a library, as well as redesigned all of the panels within the email editor to use this new library. I am continuing to working closely with engineering as they implement this conversion. The result is a more modern, intuitive, usable, and compact experience.



Process

Design process and continuous work with engineering on implementation.

DESIGN

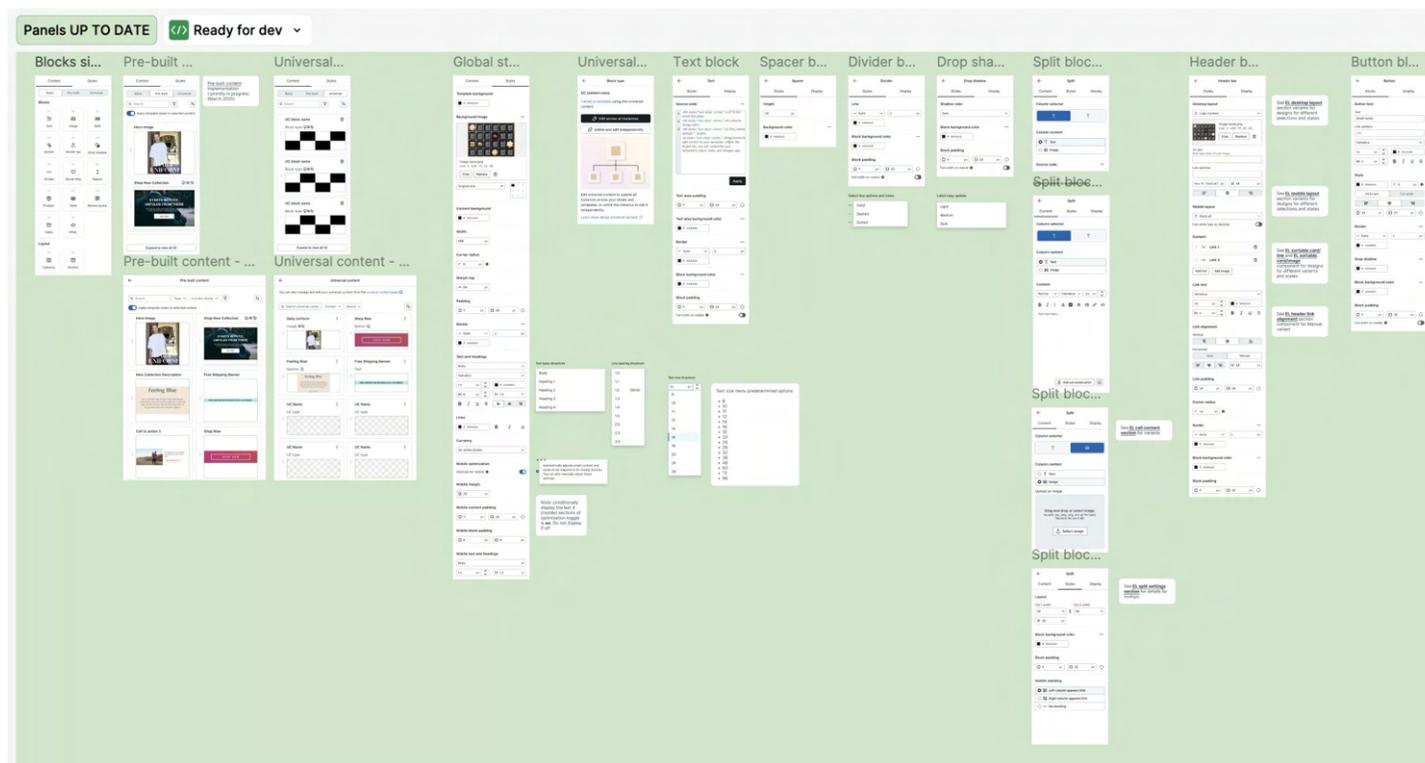
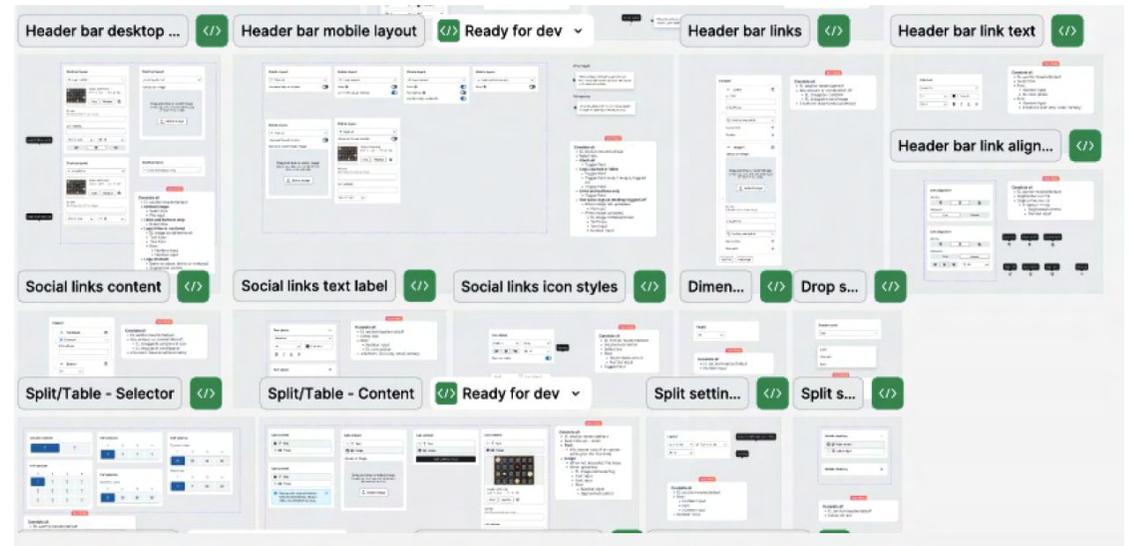
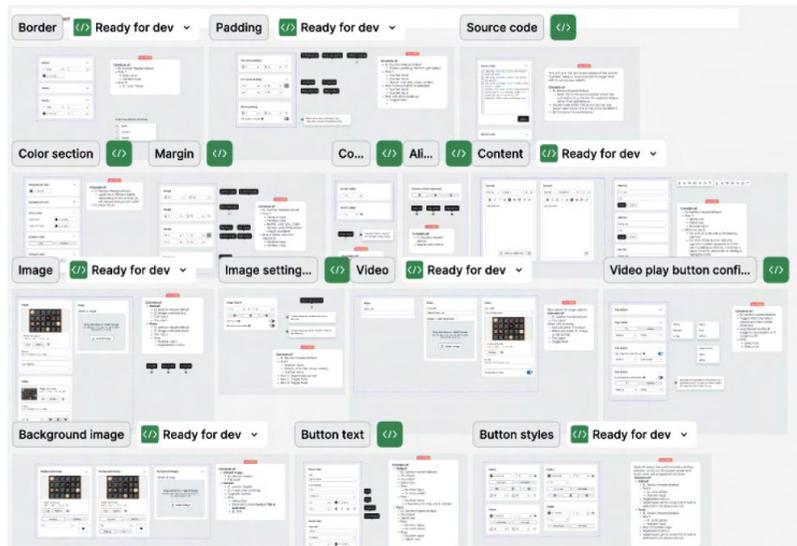
Create the Editor Library

- **Individual components** that are unique to the editor (ie. color picker, image container, grid selector, cell selector, sortable card). Worked closely with design systems to make sure these matched the style and behavior of Ascent components.
- **Composites** or “sections”: individual sections that will be made of up individual components (either Ascent or EL specific). Some will be reusable (ie. border, padding, color, text), and some will be unique (ie. layout options for different blocks, formatting options for different blocks etc.) Worked closely with content on label, description, and tooltip copy.
- **Full panels:** using the composites, put together all the of panels for all blocks found in the email editors.

IMPLEMENTATION

Continuously work extremely closely with “platform” engineers as they build the components and convert each panel. This includes ironing out design or technical hiccups that come up, and QA of each panel once it is implemented.

Just a snippet of an extensive library of 75+ components and sections, and 50+ panels redesigned



Component → Section → Panel

Example of a single component spec: the *image container*

❖ EL image container

Name overflow

Imagenamereallyreallyreallyreallyreallylong.png

Imagenamereallyreallyreallyreallyreallylon...
640 X 420·79.15 KB

Button overflow - 2 buttons

Image name.png
640 X 420·79.15 KB

Image name.png
640 X 420·79.15 KB

Button overflow - 1 button

Image name.png
640 X 420·79.15 KB

Image name.png
640 X 420·79.15 KB

Name - overflow behavior

Truncate if name gets too long (current behavior, no need to show file extension)

- If truncated, display tooltip with full name on hover

Buttons - overflow behavior

If there is not enough room for the 3 buttons (ie. in the case of translated label being too long), have 2 buttons:

- Replace *small, secondary button*
- Overflow *small, tertiary icon only button - menu-dots icon*
 - On click, open overflow menu with Crop and Delete options

In the rare case that button text is too long to fit the 2 buttons, have just the overflow button (*small, secondary icon only button*) with the 3 menu options.

Spec Notes - Image container

Consists of

- Image preview (not interactive)
- Image info
 - Name *UI2/default*
 - dimensions, size *UI2/mono/default*
- Buttons
 - Crop *small, secondary button*
 - Replace *small, secondary button*
 - Remove *small, tertiary icon only button - trash icon*

Spec notes - Dynamic image container

Consists of

- Dynamic Image preview **TBD**
- Image info
 - Name, as entered, with double braces around to indicate Django tag *UI2/default*
 - "Dynamic size" *UI2/mono/default*
- Buttons
 - Replace *small, secondary button*
 - Remove *small, tertiary icon only button - trash icon*

Component → Section → Panel

Example of 2 sections: the *image content*, and *image layout*

EL image section

Image

Image name.png
640 X 420·79.15 KB

Crop Replace

Alt text
Brief description of your image

Link address

Image

Upload an image

Drag and drop or select image.
Accepts .jpg, .jpeg, .png, and .gif file types.
Maximum file size 5 MB.

Select image

Image

Image name.png
640 X 420·79.15 KB

Edit Replace

Alt text
Brief description of your image

W 14 px

Spec Notes

Consists of:

- **Default**
 - EL section header/default
 - EL image container/big
 - Text input
 - Text input
- **Form**
 - EL section header/default
 - EL image container/small
 - Text input
 - Row:
 - Number input
 - Segmented control

Align left Align center Align right

Image layout

W 14 px H 16 px

Fill column

Fill column on mobile

Aspect ratio is locked

1 Display image at maximum size on all devices.

1 Display image at maximum size on mobile devices only.

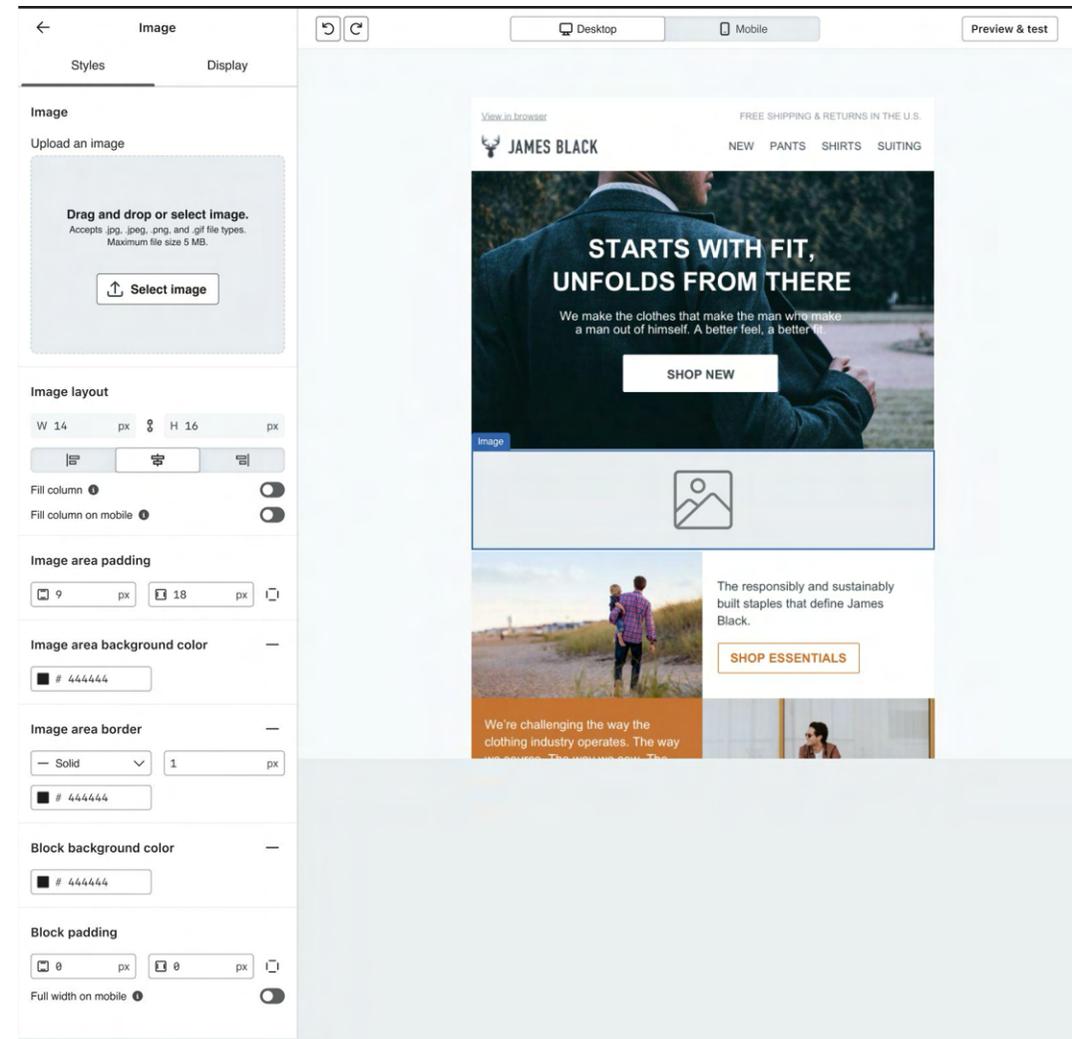
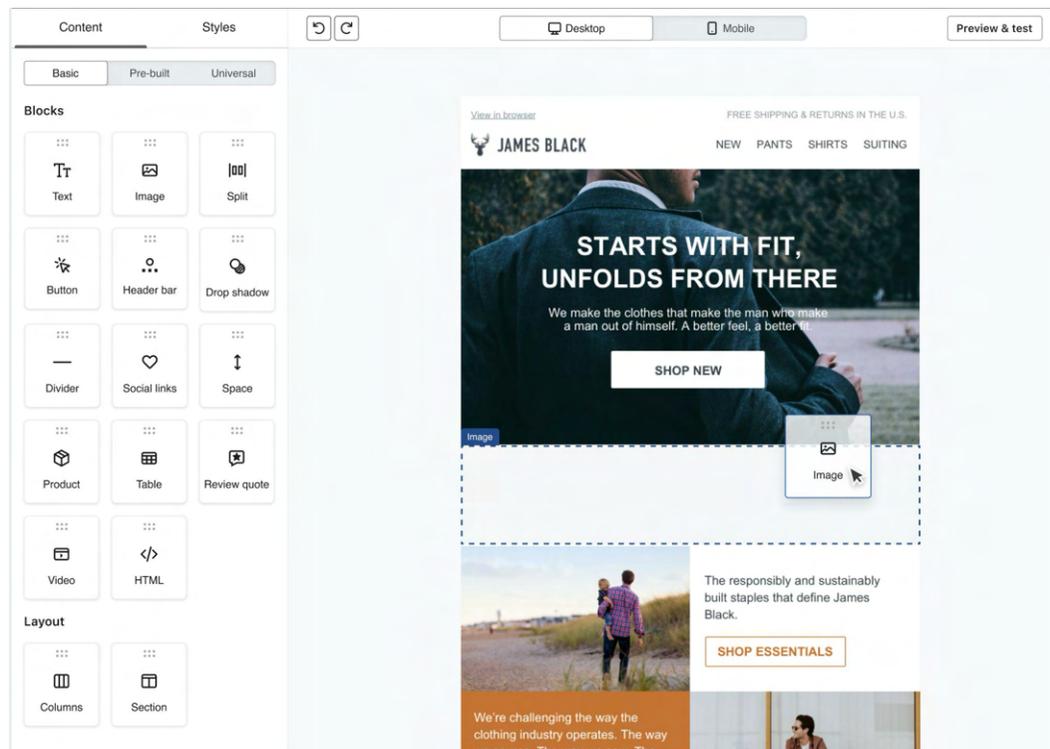
Spec Notes

Consists of:

- EL Section Header/default
- Row 1
 - Number input
 - Button *icon only, small, tertiary*
 - Number input
- Row 2: Segmented control
- Row 3: Toggle Field
- Row 4: Toggle Field

Component → Section → Panel

Example of a single panel: the *image block styles panel*



Future

Building an ecosystem of content editors.

UNITY ACROSS EDITORS

We currently have multiple content editors: Email, SMS, Push, and Forms, with emerging channels such as RCS and WhatsApp in Beta. There has been much inconsistency across these editors, as well as the aforementioned issue of very outdated components and code.

Up until this point, we have fully converted the Email, SMS, Push, and In-App Form editors to EL. We are also building RCS and WhatsApp editors from scratch leveraging EL. Some inconsistencies remain in the Web Form editor, and the work is ongoing by this team for a full EL conversion.

BENEFITS

1. It will be easier for users to use each of the editors and work across them
2. It will be easier for the team(s) to maintain codebases, release features, onboard new team members, and scale product areas.

PROJECT 3

AI FEATURES IN THE EMAIL EDITOR

Through a suite of tools:

- TextAI
- SectionsAI
- EmailAI

Overview

Introducing a set of AI-powered features to the email editor

PROBLEM

Our users want Klaviyo to do more when it comes to suggesting how they should better create their content. Klaviyo has a robust set of Academy courses and Help Center articles on how to create the best-performing content, but what customers are really missing out on is having our app surface data-driven suggestions to them while they are in the email editor so they don't have to go out seeking the improvements they need to make.

The needs for these tools vary based on the user and goals, so we provide a robust set of features at various levels of interaction (from very granular, like copy writing, to more broad like full template generation), to meet users where they are.

SOLUTION

This problem was addressed through 3 features in our email editor:

- **TextAI:** a copy-writing assistant that helps tailor and improve the text content of your email
- **SectionsAI:** generate new email sections or tailor existing sections by briefly describing what you want
- **EmailAI:** draft the content for your entire email, that aligns with your company's unique brand identity

TextAI

Copy-writing assistant that helps tailor and improve the text content of your email

Text AI menu tool

The screenshot displays the Text AI menu tool interface. At the top, there is a dark header with a back arrow, the text "Email name", a "Saved just now" indicator, and a "Save & exit" button. Below the header is a toolbar with a left arrow, the word "Text", a "Heading 4" dropdown, a "Helvetica" font dropdown, a "14 px" size dropdown, and icons for bold, italic, link, unlink, list, image, and a "Text AI" button. A left sidebar contains a "Styles" tab and a "Display" tab. Under "Styles", there are sections for "Source code" (with a plus icon), "Text area padding" (with input fields for 9 px and 18 px), "Background color" (with a minus icon), "Border" (with a minus icon), and "Block color" (with a plus icon). Under "Block", there are input fields for 9 px and 18 px, and a "Full width on mobile" toggle switch. The main editor area shows a white email template with a logo, navigation links "SHOP" and "ABOUT", a heading "LET'S GET...", a sub-heading "It's time to design", a paragraph "Drag blocks to add content to your template. Under the Styles tab, you can customize your template's colors, fonts, and images.", a "Shop now" button, and footer text including "125 Summer St Floor 7, Boston, MA 02111", "Privacy Policy | ©All rights reserved.", and "Unsubscribe". A context menu is open over the text block, listing options: "Use AI to edit your content", "Simplify", "Personalize", "Add more detail", "Make formal", "Make friendly", "Make persuasive", and "Write a custom prompt".

Edit your content or write a custom prompt

Heading 4 Helvetica 14 px **B** *I* : A A ☰ 🖼️ 🔗 😊 👤 ✨ Text AI

LOGO PL

SHOP ABOUT

Text

LET'S GET S

It's time to

Drag blocks to add content to your text
can customize your template's

Shop now

125 Summer St Floor 7,
Privacy Policy | © All
Unsubsc

📘 📷 🐦

Use AI to edit your content

- Simplify
- Personalize
- Add more detail
- Make formal
- Make friendly
- Make persuasive

Write a custom prompt

Generate

^ View example prompts

- Rewrite to be concise and promotional →
- Include the name of my company in the description →
- Make the header sound more inspirational →

Select 'Simplify' and get results

Heading 4 Helvetica 14 px **B** *I* : A [Image] **Text AI**

LOGO PL

SHOP ABOUT

Text

LET'S GET S

It's time to

Drag blocks to add content to your text. You can customize your template's

← 1 of 4 →

Insert

Shop now

125 Summer St Floor 7, Boston, MA 02111
[Privacy Policy](#) | ©All rights reserved.
[Unsubscribe](#)

f [Image] [Image]

Flip through 4 options



SHOP ABOUT

LET'S GET S
It's time to

Drag blocks to add content to your text
can customize your template's

Shop now

125 Summer St Floor 7, Boston, MA 02111
[Privacy Policy](#) | ©All rights reserved.
[Unsubscribe](#)

←



Get more options

Update the prompt or generate more options using the current prompt.

← 4 of 4 →

SectionsAI

Generate new email sections or tailor existing sections by briefly describing what you want

The screenshot displays the SectionsAI email editor interface. At the top, there is a dark header with 'Email name' on the left, a 'Saved just now' indicator, and a 'Save & exit' button. Below the header, there are tabs for 'Content' and 'Styles', with 'Default' and 'Universal' style options. A 'Blocks' section on the left lists various email components: Text, Image, Split, Button, Header bar, Drop shadow, Horizontal rule, Social links, Space, Product, and Table. The main workspace shows a preview of an email section. A 'Section AI' modal is open, titled 'Email AI Beta', with a 'Describe the section' prompt. The prompt includes an example: 'Example: Create a sale reminder with urgency to order before midnight. Include an image at the top and a button right below.' and a character count of '0/400'. Below the prompt is a 'Generate drafts' button. The background preview shows a section with the text 'olor sit amet consectetur.' and a date '10 at 10:49 pm'. At the bottom of the preview, there is a five-star rating and the text 'Lorem ipsum dolor sit amet consectetur.' followed by 'Justine C.' and 'Feb 10 at 10:49 pm'.

Describe the type of section you want

Email name ✔ Saved just now Save & exit

Content Styles ↶ ↷ Desktop Mobile Preview & test

Default Universal

Blocks

- Text
- Image
- Split
- Button
- Header bar
- Drop shadow
- Horizontal rule
- Social links
- Space
- Product
- Table

Layout

- Columns
- Section

Section

✦ Email AI Beta ✕

Describe the section *

A layout that shows three examples of our new fall dresses that are on sale from now until the end of October.

111/400

This tool is powered by AI and currently only supports sections in this email using a limited set of blocks. You're responsible for the final content.

Generate drafts

★★★★★

Lorem ipsum dolor sit amet consectetur.
[Justine C.](#) · Feb 10 at 10:49 pm
Lorem ipsum dolor sit amet consectetur. Id consectetur eugiat.

Lorem ipsum dolor sit amet consectetur.
Feb 10 at 10:49 pm
Lorem ipsum dolor sit amet consectetur. Id consectetur eugiat.

Lorem ipsum dolor sit amet consectetur.
Feb 10 at 10:49 pm
Lorem ipsum dolor sit amet consectetur. Id consectetur eugiat.

Select 'Generate drafts' and get results

Email name ✔ Saved just now Save & exit

Content Styles ↶ ↷ Desktop Mobile Preview & test

Default Universal

Blocks

- Text
- Image
- Split
- Button
- Header bar
- Drop shadow
- Horizontal rule
- Social links
- Space
- Product
- Table

Layout

- Columns
- Section

Section

← Section description

Introducing our latest arrivals in fashion

Explore fresh styles and elevate your wardrobe with our [new arrivals](#) today.

[Shop new](#)

Discover the hottest trends of the season right here!

Stay ahead of the fashion curve with our curated collection of [must-have styles](#).

[Shop new](#)

Was this helpful? 👍 👎

← 1 of 4 → **Insert draft**

Content

Styles



Desktop

Mobile

Preview & test

Default

Universal

Blocks

Text	Image	Split
Button	Header bar	Drop shadow
Horizontal rule	Social links	Space
Product	Table	

Layout

Columns	Section
---------	---------

Section

Introducing our latest arrivals in fashion

Explore fresh styles and elevate your wardrobe with our **new arrivals** today.

Shop new

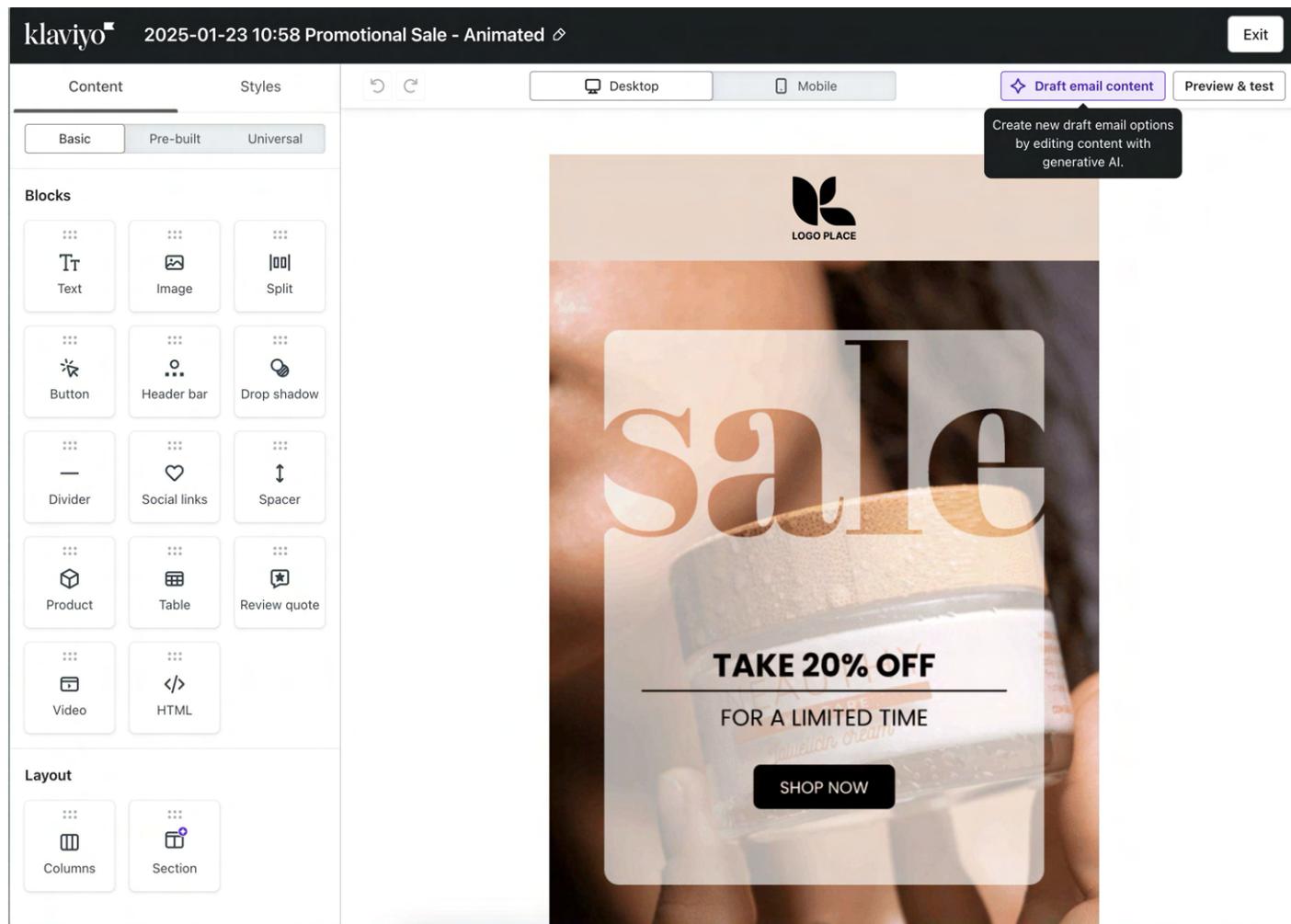
Discover the hottest trends of the season right here!

Stay ahead of the fashion curve with our curated collection of **must-have styles**.

Shop new

EmailAI

Draft the content for your entire email, that aligns with your company's unique brand identity



✦ Draft email content Beta

Exit Insert in editor

Reference email

New options are generated based on this template



2025-01-23 10:58 Promotional Sale - Animated
Feb 19, 2025

Describe your email content *

Include details about message and tone.



Write content for an Anniversary sale with 20% off all items, and make it sound natural to my brand

0/500

[Generate drafts](#)

This tool uses generative AI technology, and you are still responsible for the final email. Beta supports limited criteria.

This is a preview. You can update this template in the editor.



Describe your email content

klavivo 2025-01-23 10:58 Promotional Sale - Animated Exit

✦ Draft email content Beta Exit Insert in editor

Reference email
New options are generated based on this template

 2025-01-23 10:58 Promotional Sale - Animated
Feb 19, 2025

Describe your email content* 🗨️
Include details about message and tone.

Create a sale reminder for select items that are valid through the end of the month. These items should be about self care and luxurey - including lotions, serums, and other skin care.]

184/500

Generate drafts

This tool uses generative AI technology, and you are still responsible for the final email. Beta supports limited criteria.

This is a preview. You can update this template in the editor.



TAKE 20% OFF
FOR A LIMITED TIME

SHOP NOW

Glow Naturally
10% OFF FOR A LIMITED TIME

This is your moment to indulge in self-care with a touch of luxury. Crafted with the finest natural ingredients, our skincare is designed to nourish your skin and elevate your beauty routine. From hydrating serums to silky-smooth lotions, every product is a step toward radiant, healthy skin.

Don't wait—this exclusive offer won't last long. Embrace the glow you deserve while saving 20%. Your skin (and the planet) will thank you.

SHOP NOW

Select 'Generate drafts' and get results

klavivo 2025-01-23 10:58 Promotional Sale - Animated Exit

✦ Draft email content Beta Exit Insert in editor

Reference email
New options are generated based on this template



2025-01-23 10:58 Promotional Sale - Animated
Feb 19, 2025

Describe your email content * 🗨️
Include details about message and tone.

Create a sale reminder for select items that are valid through the end of the month. These items should be about self care and luxury - including lotions, serums, and other skin care.

183/500

Generate drafts

Preview

Reference

Draft 1

Draft 2

Draft 3

Was this helpful? 👍 👎

This tool uses generative AI technology, and you are still responsible for the final email. Beta supports limited criteria.

This is a preview. You can update this template in the editor.



TAKE 20% OFF

FOR A LIMITED TIME

SHOP NOW

Glow Naturally

10% OFF FOR A LIMITED TIME

Time to pamper yourself with a dash of luxury! Our premium skincare range, made from the finest natural ingredients, is here to elevate your beauty routine. Dive into our collection of hydrating serums and silky lotions, each crafted to give you that radiant, healthy glow.

Hurry—this exclusive offer lasts only until the end of the month. Enjoy the glow you deserve while saving 20%. Your skin (and Mother Earth) will thank you.

SHOP NOW

Select a draft and insert in the editor

klaviyo 2025-01-23 10:58 Promotional Sale - Animated ↗ Last saved: no ⌵ Preview (⌘P)

Content Styles

Basic Pre-built Universal

Blocks

- Text
- Image
- Split
- Button
- Header bar
- Drop shadow
- Divider
- Social links
- Spacer
- Product
- Table
- Review quote
- Video
- HTML

Layout

- Columns
- Section

Draft email content inserted. ✕

Draft email content Preview & test



Future

Unifying our AI feature-set

UNITY OF OUR AI TOOLS

Each of these AI features addressed different user needs at varying levels of granularity. However, for a more cohesive experience we are thinking about how we can streamline interaction for AI in the editor - making AI embedded in your workflow in a more intuitive and innate way.

USER RESEARCH

We ran some research calls focused on how users envision AI playing a role in their workflows. Some findings were:

- Users want to be met with suggestions in the moment: they want content assistance to save them time by keeping their focus where they are instead of having to navigate to another UI.
 - Users state that AI should be there when requested, not in the forefront
 - Users noted how some of these features, like emailAI, would be useful prior to even getting into the editor (like before, during their email campaign or flow set up).
-

SOLUTION TO EXPLORE

AI tools surfaced **in-line**: this will make these tools more discoverable, accessible, and in-context of the entry point. We will have to explore how to make this possible, while minimizing intrusion and making sure content isn't being covered.

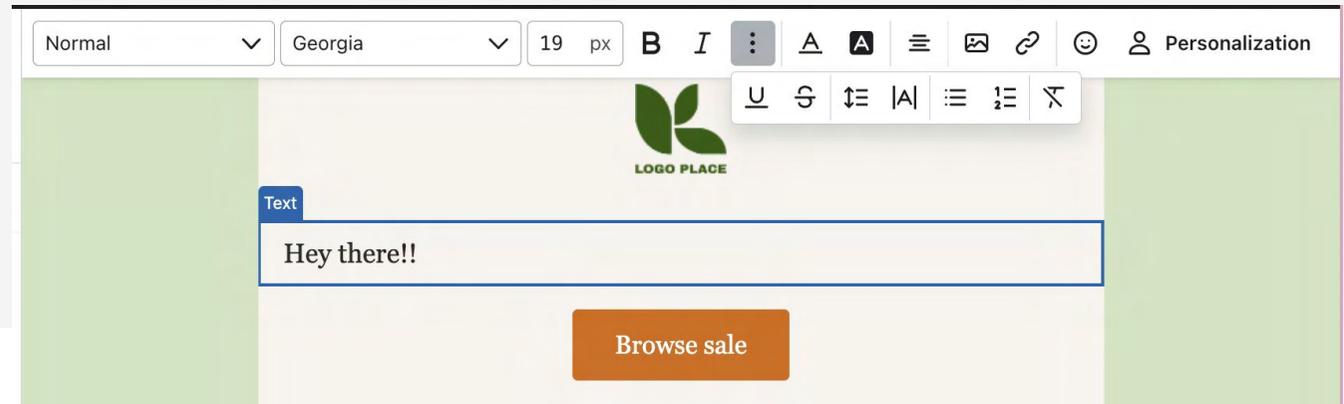
PROJECT 4

IN-CANVAS EDITING

Introducing in-canvas editing to the Text block in the email template editor.

Overview

New



PROBLEM

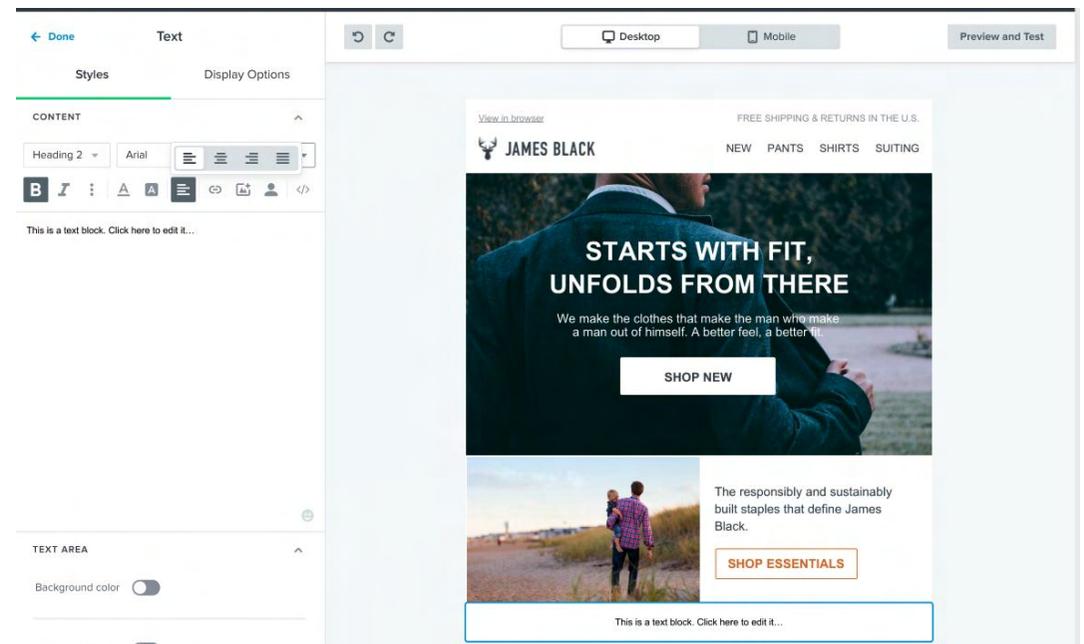
The current email editor poses a UX challenge, demanding multiple steps to configure content in a side panel for each block, rather than directly in the canvas. It also puts us behind competitors (like Mailchimp, Flodesk, Hubspot, Constant Contact) and other heavily used applications (like Canva and Google Docs).

Introducing in-canvas editing, starting with the most frequently used text block enhances usability and supports the design principle of proximity.

SOLUTION

Introduce text writing and editing directly in the canvas, with text styling controls appearing close within reach of the editing space.

OLD



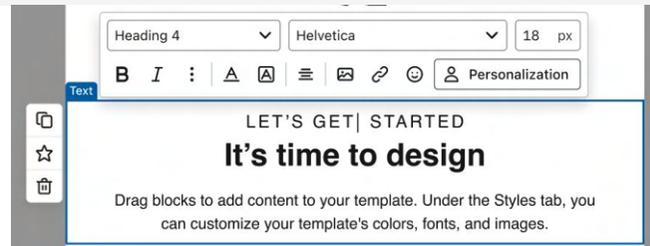
Current state

The screenshot shows a text editor interface with a 'Text' block selected. The left sidebar contains a 'Styles' panel with 'CONTENT' and 'TEXT AREA' sections. The 'CONTENT' section shows 'Heading 2', 'Arial', and '8' font size. The 'TEXT AREA' section has 'Background color' and 'Border' toggles, and 'Padding' settings for 'Top' and 'Bottom' (both set to 8 px). The main preview area shows a desktop view of a website with a 'JAMES BLACK' header, a 'STARTS WITH FIT UNFOLDS FROM THE' headline, and a 'SHOP NEW' button.

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Iterations

We went through multiple iterations as a result of user feedback to land on the ideal solution.



Concept Testing

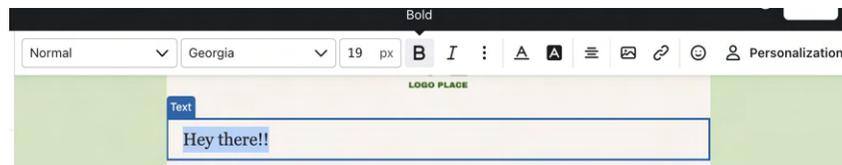
After doing competitor analysis, we concept tested 3 design options with various users.

Floating Toolbar

Based on the user testing, the "floating toolbar" design was the one we landed on.

Negative Feedback

When we released to 10% we got some negative feedback.



Follow-up

After going through the feedback and speaking directly with users, we realized we needed to make a change to our solution.

Static Toolbar

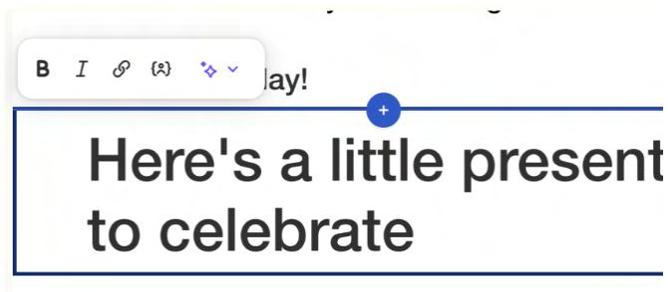
We quickly pivoted to the "Static toolbar" option. We started seeing a large decrease in support tickets and negative feedback.

Learnings

Sometimes concept testing doesn't fully capture the reality, and it's important to have a path to quickly iterate on solutions :)

Competitor research

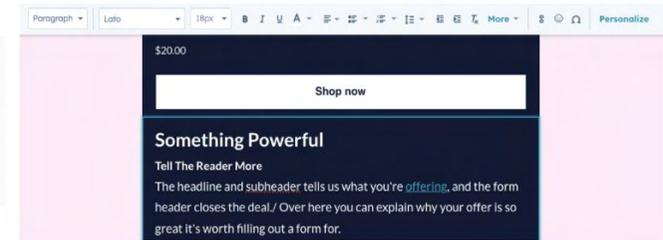
SHOPIFY



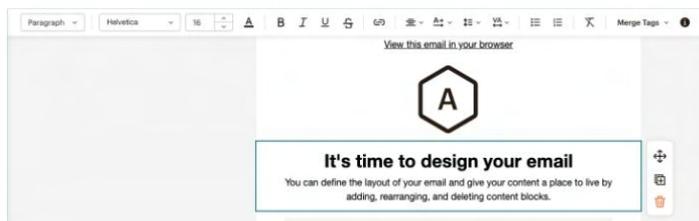
TABULAR



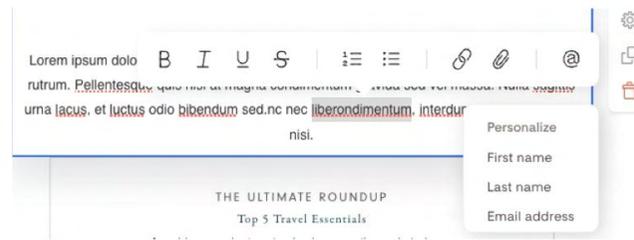
HUBSPOT



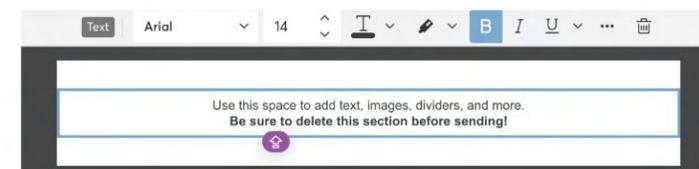
MAILCHIMP



FLODESK



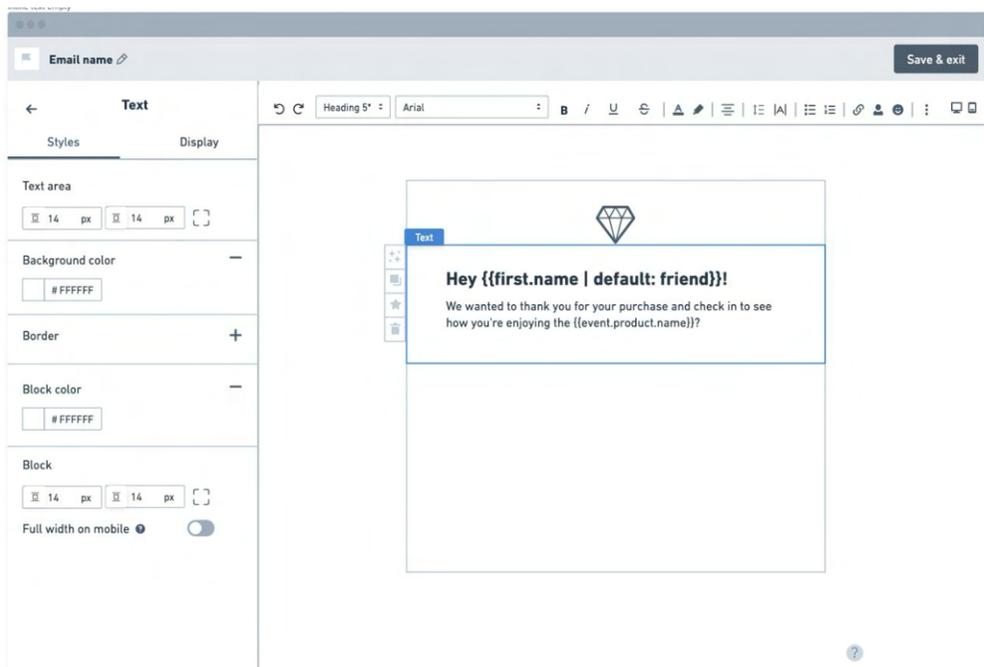
CONSTANT CONTACT



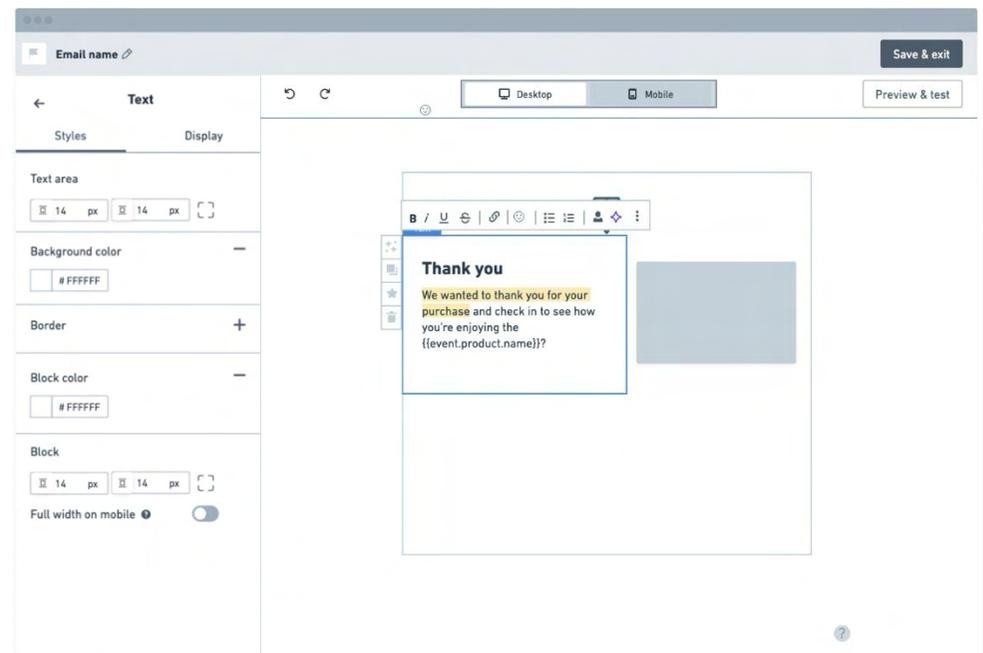
Concept testing

The research was aimed to help learn where users would expect to find options/settings while editing in-line text blocks. Users were asked about their ideal state and then shown concepts of options & settings presented.

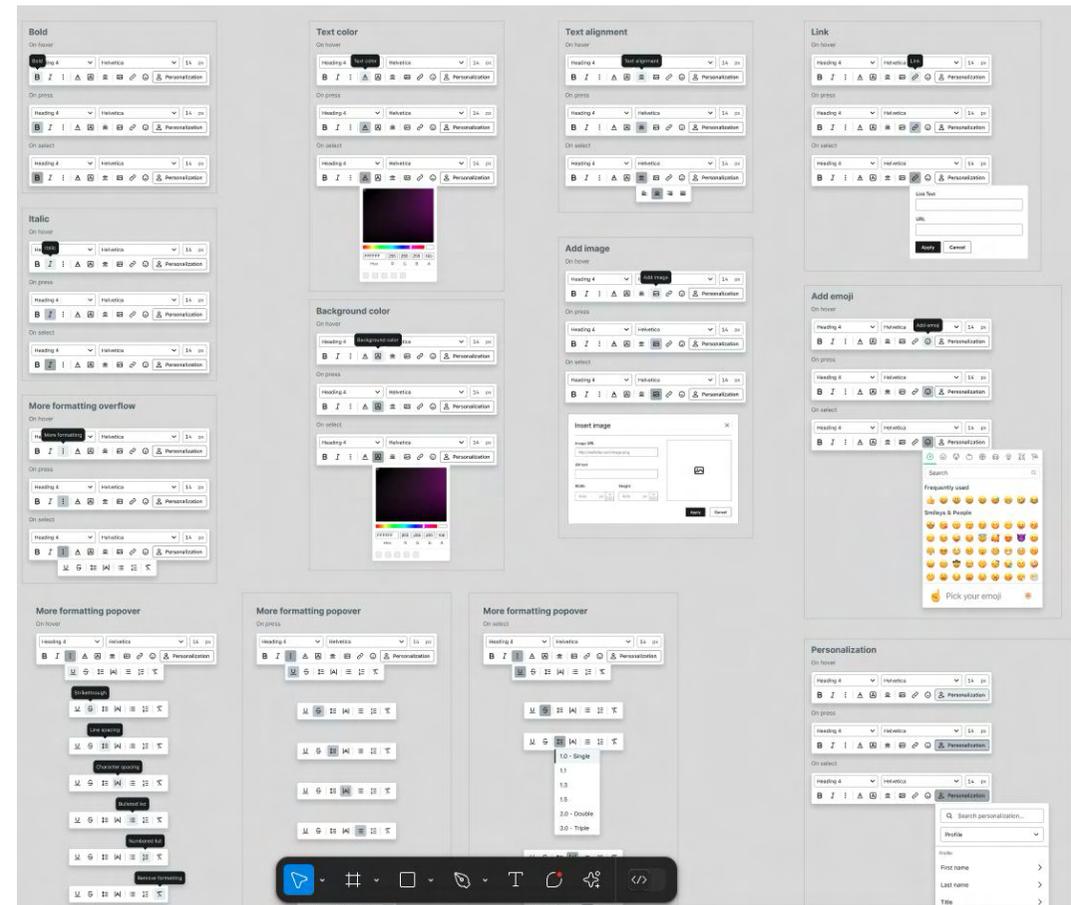
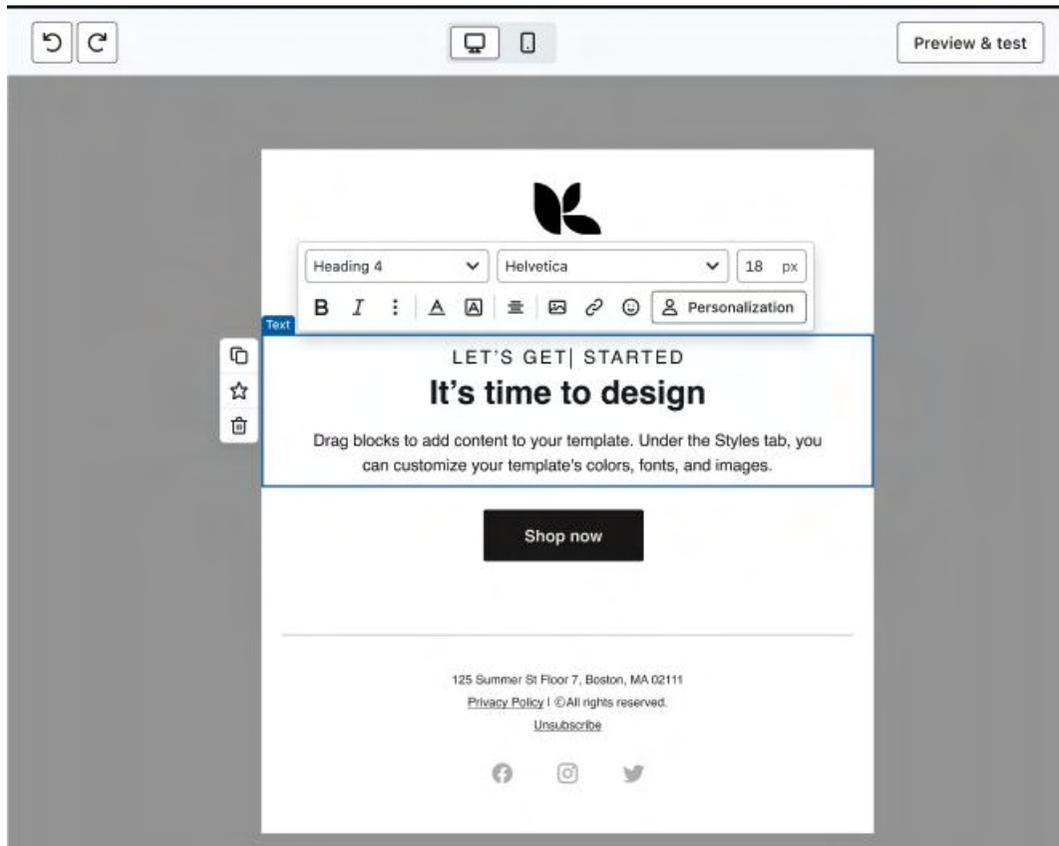
STATIC TOOLBAR



FLOATING TOOLBAR



Initial design



Limited availability (10%) - feedback

NEGATIVE FEEDBACK ON THE FLOATING TOOLBAR AFTER RELEASING TO LA

- Many support tickets and complaints that the floating toolbar was too intrusive and cumbersome - blocking the content of blocks users wanted to edit.
- Users expressed that they did not want the text editing options to appear directly where they are working, which is contrary to what users were saying during concept testing.

Sometimes concept testing doesn't fully capture the reality of working within the product!

ADDITIONAL CUSTOMER INTERVIEWS

We reached out to some of the customers that submitted support tickets to speak with them directly.

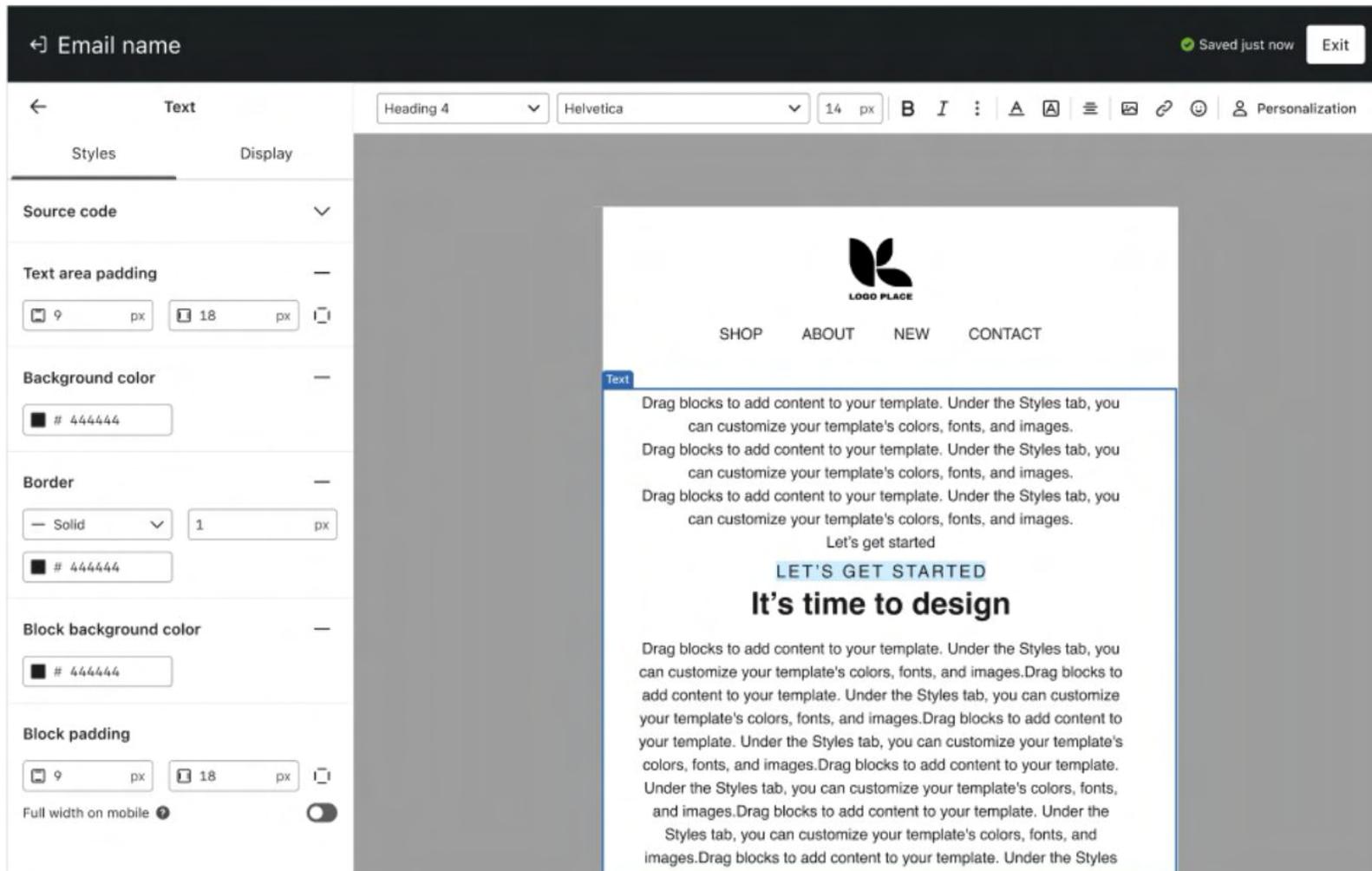
All of them said that they liked that they could now type in the canvas, but disliked how the toolbar was in the way.

They preferred the text editing options to be out of the way, but easily accessible, like at the top of the canvas (a few noted Google Docs and Canva as examples).

When showing the static toolbar as an alternative, they had really positive reactions

Pivot solution

We were able to super quickly pivot and switched to implementing the static toolbar solution.



We had a HUGE decrease in tickets, and very few users complaints about this experience, and released it to 100% of users.

We have since gotten positive feedback on the new in-canvas capability.

