



How Klaviyo's data team used Coefficient to scale rapidly



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Head of Reporting and Analytics

Klaviyo powers smarter digital relationships, making it easy for businesses to capture, store, analyze, and predictively use their own data to drive measurable, high-value outcomes.

Challenges

Results

1. Data-hungry teams across Klaviyo were constantly making ad hoc requests. Klaviyo's data team found it challenging to keep pace.
2. The absence of automated reporting created further bottlenecks.
3. As Klaviyo scaled, so did the size of its data stack. They needed a solution that could integrate these solutions into the business users' favorite tool: spreadsheets.

1. Coefficient enabled true self-serve analytics, allowing the data team to reclaim nearly two months previously lost to manual data processes.
2. Coefficient enabled the data team to centralize reporting, incorporating automated queries to guarantee up-to-date, live data.
3. Coefficient's impact and utility across their GTM team led to its swift and widespread adoption throughout Klaviyo, with use cases ranging from auditing to product analytics, operations, and FP&A.

TECH STACK

Last-mile reporting and user enablement by enabling analysis in a familiar spreadsheet interface.



Database /
Warehouse



BI / Analytics



CRM

As Klaviyo transitioned from a scrappy startup to a mature company, increasing data demands and continuous ad hoc requests challenged their data team.

To cater to their data-savvy stakeholders, Klaviyo's data team sought a way for them to independently access and interpret data using their preferred tool: spreadsheets.

That's when they discovered Coefficient.

Challenge: rapid growth, data bottlenecks

From its beginnings as an email marketing platform to evolving into a robust SaaS platform, Klaviyo is a shining example of how to effectively scale a SaaS company.

And as Klaviyo scaled, one tool remained a constant companion – spreadsheets.

Evan Cover, Director of BI, Engineering, and Governance, recalls:

“Three years ago, our business was growing so fast that we needed a way to satisfy the data needs of our business without causing behaviour change. Our team thrived with a pivot table approach, which let us quickly grasp and model our business nuances.”

The flexibility of Google Sheets suited their then-small data team, but Klaviyo's growth introduced new challenges. As the company scaled, so did its data stack.

At the same time, data-hungry teams across the organization were requesting ad hoc data pulls from Snowflake and other systems.

This bottleneck led to the need for a solution that could bridge the gap between the tools in their tech stack and reduce the number of ad hoc data requests.

"We had to move fast, iterate, and ensure data from our data warehouse was accessible for our team to get into a place where non-technical users can use it," says Evan.



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– Evan Cover , Director, BI Engineering & Governance, Klaviyo

The solution: make spreadsheets scale for Klaviyo

Initially, Klaviyo explored solutions that mirrored Google Sheets' ease and functionality. These spreadsheet-like solutions fell short. Additionally, the team didn't want to introduce yet another SaaS solution for the team to learn.

That's when the data team searched for ways to enhance their existing spreadsheet workflows.

Enter Coefficient. Evan shares, "It was the perfect opportunity. Not only could Coefficient solve our request issue through self-serve, but it also offered a user-friendly format everyone was familiar with."

The impact was immediate.

"Getting started with Coefficient was stupid easy – it just worked. All you needed was to input your credentials and begin extracting data," says Evan, adding, "We use Coefficient when we want to go fast."



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No more waiting or requesting updates – teams could self-serve, tapping directly into the wealth of Klaviyo’s data.

For example, Laurie Josephson, Head of Reporting and Analytics, elaborates on how her team blended different data sources, from BI metrics in Snowflake to their CRM, to produce a centralized report for the CFO. “It’s so impactful to be able to blend live data with forecasts to get a real-time view of performance using my spreadsheet.”

As different departments recognized Coefficient’s capabilities, its adoption surged. Laurie describes this growth as a “hockey stick curve,” underscoring its widespread appeal across teams, from FP&A to Sales.

But the product team stood out. Not only were they avid users; they became evangelists for Coefficient. Their enthusiasm led them to create an internal Wiki dedicated to onboarding teammates throughout Klaviyo.

The wiki wasn’t just a basic tutorial. It covered everything from initial setup, importing data (with or without SQL), to selecting the right tables. They also built a dedicated FAQ alongside an on-demand video walkthrough.



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– Laurie Josephson, Head of Reporting and Analytics

The results: months of time reclaimed

As Klaviyo integrated Coefficient into their workflows, the outcomes were clear.

“Coefficient unlocked vast amounts of data in our warehouse, allowing our technical analysts to rapidly construct models. While no model is perfect, their value is in their utility. With the speed Coefficient provided, these models have become immensely useful,” finishes Evan.

“All in all, we’ve reclaimed about two months that would have been consumed by manual data operations,” Laurie emphasizes. “Reports that would normally take three months to build can be now built in a week with Coefficient.”

Coefficient has also been instrumental for:

- ★ **Democratizing access to live data:**

Coefficient’s automated query scheduling ensured Klaviyo teams consistently received up-to-date data. The team centralized and streamlined their reporting process.

- ★ **Streamlining executive reporting:**

Coefficient simplifies the creation of board materials for Klaviyo, saving about a week of senior manager time every quarter.

★ **Performing product analytics:**

When launching a feature or testing an element, Klaviyo's Product Team uses Coefficient to create a dashboard to monitor performance against set KPIs or objectives.

★ **Maintaining data integrity:**

Klaviyo uses Coefficient for data audits and reconciliation, creating dashboards that monitor Snowflake for inconsistencies in hourly cadences. This allows the data team to triage and take corrective actions in near real-time.

Laurie finishes, "The reason why we love spreadsheets is that using data is easier in a spreadsheet... nothing competes with their flexibility. Coefficient allows us to tap into that flexibility at scale."



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