



The New Era of Moments-Based Marketing

5 Steps to Evolve Your Marketing Strategy

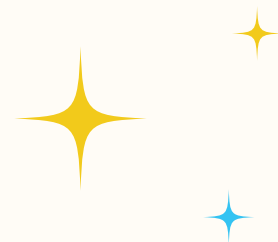


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Standing Out in the Age of Overload

Marketing has hit a breaking point: the old playbook of campaign calendars and batch blasts no longer works. The reality is, your customers have seen it all. They're bombarded across every screen. They can smell a generic blast from miles away. They're numb to your discounts, immune to your urgency tactics, so they scroll by campaigns without a second thought. Consumers today expect in-the-moment, context-aware marketing.

But delivering that kind of relevance is harder than it looks — and most marketers are still struggling to keep up. Here's why:

Why marketers struggle to meet skyrocketing customer expectations

DATA ACTIVATION GAP	MARKETING COMPLEXITY	DOING MORE, WITH LESS
57% of marketing executives cite data inconsistency as the major challenge to personalization. ~ Statista, 2023	54% of marketers say their biggest challenge is building a multi-channel strategy. ~ Ascend2, 2023	Marketing budgets have declined by 15% year-over-year. ~ Gartner, 2024

To thrive, marketers must adopt a new approach — one built for real-time signals, adaptive experiences, and growth designed moment by moment.

What makes this shift possible today is the rise of AI-powered agents. These intelligent services act on behalf of marketers — suppressing fatigue, choosing the right channel, optimizing send time, **triggering** in the moment, even generating copy — all without requiring manual setup. Instead of relying on teams to chase every signal, agents scale personalization autonomously, so brands can deliver relevance at customer speed.

So how do marketers make this shift and engage in the moment? Let's break it down.

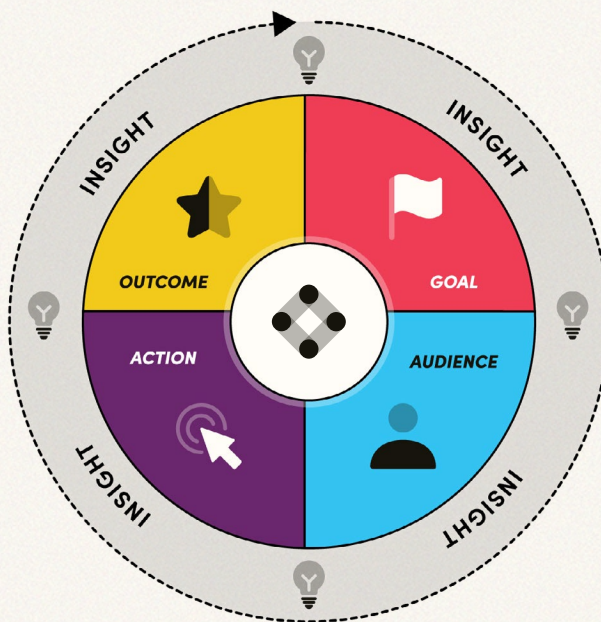
What Makes a Moment?

The future of marketing lies in moments – timely, contextual interactions that build loyalty. So what defines a “moment,” and how can marketers harness them to drive growth?

Each moment has five core elements for implementing a goal-oriented experience:

- » **GOAL** – What measurable outcome are you trying to achieve?
- » **AUDIENCE** – Who is most likely to help you reach it?
- » **ACTION** – What behavior signals the right time to engage?
- » **OUTCOME** – What result was delivered in the moment?
- » **INSIGHT** – What did you learn from the outcome, and how will it shape the next moment?

By framing experiences starting with the goal, you shift from guessing the target to designing outcomes and letting AI surface the right audience and actions to achieve them.



When the GOAL is defined, Iterable finds the right AUDIENCE and ACTION to achieve it, delivers the OUTCOME, and turns it into INSIGHT that fuels the next moment.

65% of customers cite targeted messaging as their top reason to make a purchase. Brands that get all three of these core elements right and harness the power of moments-based marketing will turn their users into loyal fans.

Mapping to the Moment

BEFORE:

Static campaign calendar



1. **Mass Blast:** User receives a sale announcement that isn't personalized to their recent browse behavior



2. **Time Running Out:** The next sale follow-up doesn't recognize items the user has already added to their cart



3. **Final Hours:** User gets distracted by phone, with no reminder to direct attention



4. **Last Chance:** A final email is sent, but the user is busy and prefers to engage via text



5. **Never Mind:** User moves on without participating in the sale and ends up buying from a competitor

AFTER:

Moments-based experience



1. **Intent Captured:** User completes a website quiz, indicating both product interest and engagement intent



2. **Contextual Action:** Tailored offer based on quiz results appears in-browser while interest is high



3. **Reinforcement:** User receives a personalized follow-up email if they don't convert right away



4. **Limited Time:** The next day, user receives a localized SMS with a flash promotion, driving urgency and action



5. **Thank You for Shopping:** Upon purchase, a transactional confirmation email closes the loop

INTRODUCING NOVA:

The Catalyst for Growth in an Agentic World

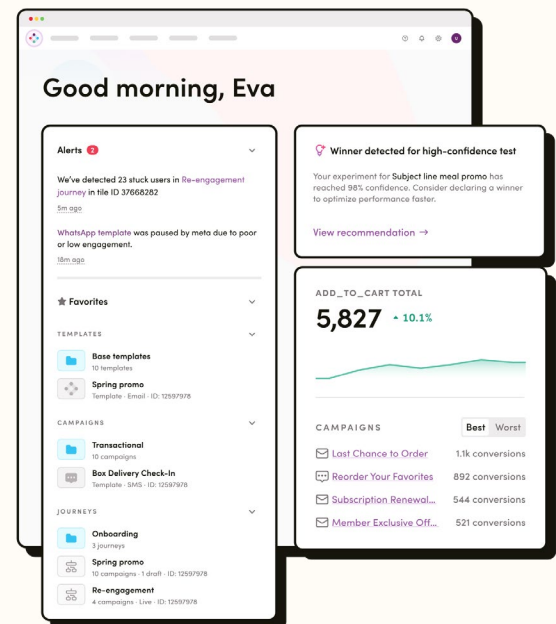
Moments are powerful, but recognizing them isn't enough. Marketers need the ability to act on them at scale across every step of the customer experience — instantly, intelligently, and without being buried in manual work.

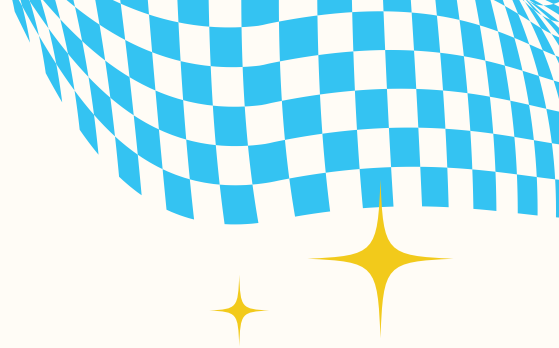
That's why we built **Nova**, the foundation of our agentic intelligence suite to help marketers thrive in the world of increasing consumer expectations. Nova understands and taps in to your business — all your data, your workflows, and most importantly, your business goals. You define the objective and Nova goes to work to deliver you insights and support your workflows with agents that take care of the heavy lifting.

How Nova Works

NOVA WAS DESIGNED TO BE

- » **Goal Driven:** Define your business outcomes—whether it's boosting conversions or driving revenue—and Nova orchestrates the right agents to pursue those goals with precision.
- » **Prescriptive:** Nova is your built-in advisor, offering personalized, data-backed recommendations based on your industry and customer behavior. No more analysis paralysis.
- » **Conversational:** Ask questions, analyze data, and surface insights instantly. Need a KPI summary or a competitive benchmark? Nova delivers the answers you need, right when you need them.





Meet Nova’s Six Agents

Nova’s power comes to life through six embedded agents, each executing specific actions on behalf of the marketer:

GOVERNANCE AGENT	Automates smart suppression and <u>frequency caps</u> to protect brand reputation and reduce fatigue.
SCHEDULING AGENT	Optimizes send times for every individual, ensuring engagement when it matters most.
DELIVERY AGENT	Chooses the best channel (email, SMS, WhatsApp, push, etc.) based on customer preferences and behavior.
RESPONSIVE ACTIVATION AGENT	Listens for real-time signals and <u>triggers journeys</u> at the perfect moment.
CUSTOMER JOURNEY AGENT	Designs, adapts, and optimizes journeys to guide customers along the right path.
WRITING AGENT	Generates, tests, and refines message variations to keep content fresh and relevant.

Each agent executes independently, but Nova’s agentic intelligence ensures they operate in sync – coordinating actions based on business goals, historical data, and engagement patterns. In other words, Nova is the intelligence that connects data, journeys, content, and strategy to achieve precision at scale.

With Nova as the foundation, the question becomes: *where is your organization today, and how ready are you to capture every moment?* That’s where the Marketing Maturity Assessment comes in.

The Marketing Maturity Assessment

The field of marketing has come a long way since the broadcast days of *Mad Men*. In the beginning, advertisers were using a mass media approach to achieve the broadest reach possible.

Today, in the [era of moments-based engagement](#), marketers seek one-to-one communication at massive scale. But not every brand has made the leap, so we've established this marketing maturity framework to help you accelerate your evolution.

Answer the following questions, and tally up your points to see where you stand.

Where Do You Stand on the Path to Moment-Based Marketing?

PERSONALIZATION DEPTH

What's your biggest blocker to real-time personalization?

- ☐ We're under-resourced, so we default to batch-and-blast **1 pt**
- ☐ Fragmented or poorly tagged data hinders activation **1 pt**
- ☐ Our current platform isn't built for this **1 pt**
- ☐ All of the above **0 pts**
- ☐ None of the above **5 pts**

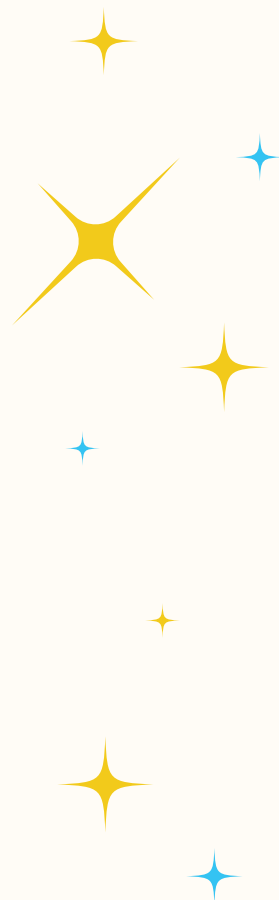
How much of your messaging is still batch-and-blast?

- ☐ 90–100% **1 pt**
- ☐ 70–89% **2 pts**
- ☐ 50–69% **3 pts**
- ☐ 30–49% **4 pts**
- ☐ Less than 30% **5 pts**

CAMPAIGN STRATEGY

How does your team split time between campaigns vs. automation?

- ☐ 90–100% campaigns **1 pt**
- ☐ 70–89% campaigns **2 pts**
- ☐ About 50/50 **3 pts**
- ☐ 30–49% campaigns **4 pts**
- ☐ Less than 30% campaigns **5 pts**



What does your team actually optimize for?

- ☐ It's unclear 1 pt
- ☐ Short-term revenue from one-off campaigns 2 pts
- ☐ Acquisition over retention 3 pts
- ☐ Revenue-led, but trying to balance 4 pts
- ☐ Long-term value (CLV, loyalty) 5 pts

DATA HYGIENE

How clean and consistent is your data management?

- ☐ Honest, I don't know 1 pt
- ☐ Messy 2 pts
- ☐ Inconsistent 3 pts
- ☐ Decent 4 pts
- ☐ Strong 5 pts

AI READINESS

Where is AI delivering value in your marketing today?

- ☐ Not using AI meaningfully yet 1 pt
- ☐ Experimenting, but early days 2 pts
- ☐ Relying on off-platform tools (ChatGPT, etc.) 3 pts
- ☐ Some embedded features within platform 4 pts
- ☐ Responsive/conversational platform aligned with goals 5 pts

SCORECARD

Total Score: ____/30

0-10 pts: Campaign-Centered

You're operating in a traditional model with significant gaps in data, personalization, and AI maturity. Jump to the next section and start with [Step 1: Building your data foundation for intelligent marketing](#). Because without reliable signals, every other step will stall.

11-20 pts: Momentum Builder

You've laid the foundation for Moments-Based Marketing. With some focused improvements, you're on your way to unlocking real-time, AI-powered experiences. In the next section, prioritize [Step 2: Redesigning journeys for real-time relevance](#) and [Step 3: Scaling contextual personalization with modular content](#) to deliver experiences that flex with customer needs.

21-30 pts: Moment-Ready

You're ready for the next era of marketing. Now it's about scaling what's working and unlocking every customer moment with confidence. In the next section, advance your marketing maturity further with [Step 4: Putting AI to work with human-led expertise](#) and [Step 5: Turning strategy into revenue-critical action](#).

The 5 Steps to Moments-Based Marketing

Moments-based marketing isn't a single tactic — it's a system. These five steps outline how to move from static campaigns to a responsive approach where every interaction compounds into growth.

Step 1: Build your data foundation for intelligent marketing.

Every great strategy starts with a foundation. For marketers, that **foundation is data** — not just the amount collected, but whether it's accessible, trustworthy, and ready to drive action.

And yet, most teams are struggling. In our **2025 Activate survey**, **66% of marketers** described their data management as “inconsistent” or “messy.” Only **4% reported strong data hygiene**, and 9% admitted they didn't know enough about their data to answer at all.

THE CHALLENGES MARKETERS FACE

- » **Scattered systems:** Data lives across multiple tools and departments, making it nearly impossible to unify into a single view.
- » **Tickets and bottlenecks:** By the time marketers get data via engineering requests or delayed dashboards, the customer moment has already passed.
- » **AI without fuel:** Teams are told to be “AI-ready,” but agents can't perform if the input data is stale or unreliable.

THE MINDSET SHIFT

To overcome these hurdles, marketers need to rethink the role of data. It's no longer enough to simply connect systems together. The foundation must act as an intelligence engine — compounding signals into decision-ready insights. This is where **agents** become critical: by plugging into that engine, they ensure every signal has an outlet for immediate, automated action.

The real question isn't “does the data flow?” but “does the data generate signals that improve performance?”

CHEF'S NOTE

Building a data foundation is like planning a meal. Some ingredients come from your pantry, others from the grocery store, and occasionally you need a trip to a specialty shop. The fresher and more consistent the ingredients, the better the outcome. But if you rely on stale or mislabeled items, the recipe fails no matter how skilled the chef is.

WHAT YOU NEED TO SUCCEED

1. Optimize Your Performance in Real-Time

At the core is Iterable's ability to unify identity, behavior, [Brand Affinity](#), and intent into a single, dynamic record. Together, these features create a single source of truth that adapts as customers — and business needs — evolve.

	<u>USER PROFILES</u>	<u>CATALOG</u>	<u>DATA FEEDS</u>	<u>EVENT-BASED DATA</u>
SIGNALS	Personal context (identity, history, intent)	Business context (products, promotions, services, offers)	External context (inventory, pricing, loyalty status, weather, location)	Behavioral triggers (browse, purchase, milestone, engagement signals)
FUNCTION	Creates a continuously updating record of who the customer is, what they care about, and how they interact.	Aligns personalization with business strategy, ensuring campaigns promote the right offers at the right time.	Provides live inputs that reflect changing availability, offers, or environments — helping marketers pivot with shifting conditions.	Powers the “when” through the Responsive Activation Agent, turning static campaigns into responsive journeys that fire at the best possible moment.

2. Flexibility and speed.

Not every team has the same resources, but every team needs agility. Iterable's cloud-native, API-first architecture scales with your maturity:

- » Lean, resource-constrained teams can start with [webhooks](#) and [native integrations](#).
- » Robust teams can build bespoke [APIs](#) for a custom competitive advantage.
- » If you're in between, make the most of data sync with [Smart Ingest](#) and reverse ETL.

3. Streamlined, cross-functional access.

Data is only adds value if marketers can act on it without being hindered by bottlenecks, tickets or dev cycles — self-serve access ensures teams can capture the moment. This requires alignment across data, engineering, and marketing to define a shared customer truth (more on this in Step 5).

Iterable partners with customer data platforms like [Hightouch](#), [Segment](#), [mParticle](#), and to streamline data ingestion and activation, so your marketing team can tap into instant behavioral insights without relying on technical resources.

[Joybird](#) cut tech resource requirements by 93% by activating data through Iterable for dynamic segmentation and streamlined campaign flexibility.

Step 2: Redesign your journeys for real-time relevance.

Once data is unified in a trusted foundation, the next step is to put it into motion. Journeys need to flex and pivot based on customer signals and shifting demand — not stay locked in static, pre-planned funnels. This is where AI agents elevate adaptability to the next level, automating pivots and optimizations in the background so teams can keep pace with customers in real time.

But most marketers say they're not ready. In our **2025 Activate survey**, the top blockers to real-time personalization were **fragmented data (33%), lack of technical resources (20%), under-resourced teams (18%), and silos (7%)**. Another 20% said it was all of the above.

The takeaway? Even with the right intentions, most organizations still fall back on rigid, funnel-driven journeys that fail to adapt to customer signals.

THE CHALLENGES MARKETERS FACE

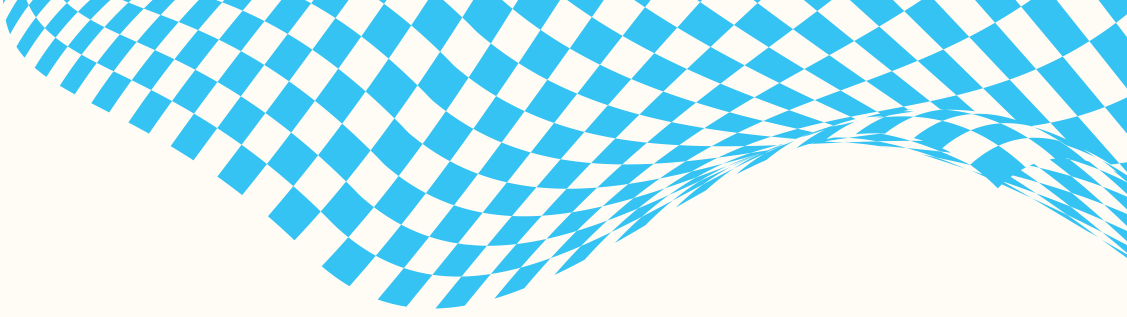
- » **Rigidity:** Most journeys are designed months in advance, locked into funnel logic, and fail to pivot when customer needs change. Without AI-powered agents to detect shifts and reroute in real time, adaptability hits a ceiling.
- » **Consumer burnout:** When funnels are brand-first, not customer-first, overexposed audiences tune out repetitive flows.
- » **Misalignment:** Collaboration across editorial, growth, and regional teams is poor, and learnings aren't shared quickly enough to improve future journeys.

THE MINDSET SHIFT

The future of customer journeys isn't about charting a straight line from awareness to conversion (RIP traditional funnels). It's about guiding adaptive paths that can change as signals change. That means embracing agility as a constant and embedding intelligent, agentic systems that don't just react — they anticipate, making proactive pivots and surfacing the next best action while marketers stay focused on strategy.

CHEF'S NOTE

Designing customer journeys is like hosting a dinner party. You might plan a menu, but guests arrive late or bring unexpected plus-ones. A great host doesn't just follow a rigid plan — they adjust in real time, swap seating arrangements, and re-sequence courses so everyone feels taken care of. Journeys should be the same: flexible paths that adapt as signals change.



WHAT YOU NEED TO SUCCEED

1. Proactive intelligence.

Modern journeys can't just react; they need to anticipate. Iterable's [Predictive Goals](#) make this possible by surfacing diagnostics and enabling real-time rerouting, while [Brand Affinity](#) labels help determine the right intensity of engagement — prioritizing loyal customers for upsell and suppressing disengaged ones before burnout sets in. The Responsive Activation Agent powers those [event-based triggers](#), ensuring the right journey fires instantly as signals shift, while [Catalog](#) keeps customer interests aligned with brand priorities.

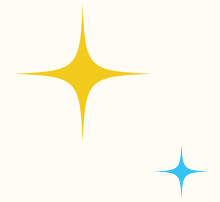
2. Experimentation & agility.

Journeys are not one-and-done. Without iteration, flows become stale and predictable, fueling audience fatigue. Marketers need the ability to continuously test creative, timing, and sequencing to keep experiences fresh. Iterable's [Writing Agent](#) embeds this agility into workflows, while agentic intelligence keeps A/B testing and optimization running seamlessly in the background — so journeys evolve continuously, not episodically.

3. Collaboration at scale.

Adaptive journeys demand cross-functional collaboration. Growth, editorial, and regional teams all need visibility into the same signals — and the ability to act on them quickly. [Iterable Studio](#) provides a shared environment with collaborative features (like sticky notes and shared workspaces) to keep every team aligned and in sync.

[Madison Reed](#) increased **subscription upgrades by 45%** with dynamic journeys triggered by real-time behavior and powered by Iterable.



Step 3: Scale contextual personalization with modular content.

Once journeys can adapt dynamically, the next challenge is ensuring the content inside them can flex just as easily. Even the smartest journey falls flat if what fills it feels stale, generic, or irrelevant to the moment.

Personalization today can't stop at a name in a subject line. Customers expect content that adapts to context — their intent, timing, and even emotions. Yet most marketers are still working with quarterly templates and static assets, which leaves them underwhelmed and tuning out. To achieve this at scale, marketers need AI-powered agents that can assemble and adapt creative in the background.

THE CHALLENGES MARKETERS FACE

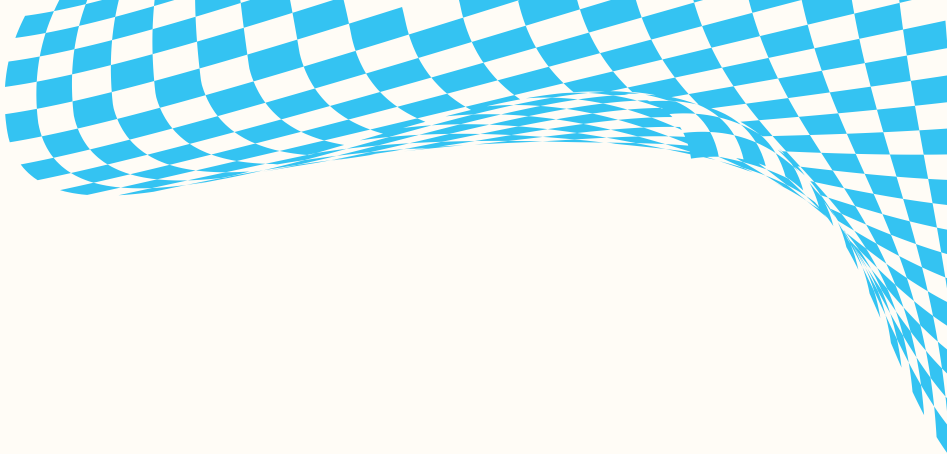
- » **Static templates:** Most content is built in rigid campaigns, updated quarterly, and re-used too often. Adding `{{first_name}}` doesn't cut it anymore.
- » **Context ignored:** Without adapting to intent, timing, or mood, content risks sounding tone-deaf or irrelevant.
- » **No feedback loop:** Learnings from campaigns are rarely applied to future moments, so mistakes repeat instead of fueling growth.

THE MINDSET SHIFT

Content must evolve from static publishing to a living system. That means building it in modular blocks, adapting it to both customer and business context, and continuously iterating based on feedback. With agents in the loop, personalization becomes dynamic — shifting copy, offers, and creative in real time without adding production strain. Instead of one-off campaigns, content is treated like a system of pieces that can be reassembled and optimized with shifting priorities.

CHEF'S NOTE

In Step 1, we gathered the ingredients. Now, the task is adjusting the dish for who's at the table. The pantry (content) gives you flexible options. But the magic happens when you adjust seasoning for the guest and occasion (context) and then refine the recipe each time based on feedback (iterative learning). That's what turns good content into a system that improves with every serving.



WHAT YOU NEED TO SUCCEED

1. Modular building blocks.

Effective personalization starts with flexibility. Instead of rigid templates, marketers need reusable [snippets](#), [templates](#), and [content blocks](#) that can be assembled in endless combinations of text, image, and offers.

With [Iterable Studio](#) — and integrations with partners like [Movable Ink](#), [Contentful](#), and [Jacquard](#) — teams can create content that pulls in live data and adapts in real time. The result: limitless personalization at scale without slowing production.

2. Context alignment.

Personalization isn't just about who the customer is — it's about where they are and what the business needs to highlight. The real win comes when customer context (behavior, timing, intent) meets business priorities (inventory, promotions, seasonality). Iterable's [Catalog](#) makes this possible at scale by dynamically pulling the right product, offer, or piece of content into each message. Paired with [Brand Affinity](#), marketers can adjust content and frequency to match each customer's engagement level, making personalization feel more human and relevant.

3. Iterative learning.

Every campaign is a test. Marketers must capture outcomes and apply learnings broadly across audiences and moments. For instance, if holiday shoppers buy kids' clothing, they're strong candidates for back-to-school offers — but only if that insight is fed back into the system. With experimentation tools and the [Writing Agent](#) testing copy variations in the background, brands can evolve content continuously instead of repeating mistakes. Agentic intelligence keeps this cycle running seamlessly — learning from each outcome and applying it to the next iteration.

A+E Networks increased monthly sends by 50% while saving **75% in production time** using reusable snippets, templates, and content blocks within Iterable's Studio.



Step 4: Put AI to work with human-led expertise.

With adaptive journeys and modular content in place, the next step is acceleration. But acceleration without intelligence risks chaos. Marketers today are under pressure to “do AI,” yet many lack clarity on where to start, how to trust it, and how to make it part of day-to-day workflows.

AI can’t succeed when it’s treated as a buzzword or a bolt-on. To create value, it must be integrated into strategy, guided by human expertise, and applied in ways that are transparent, practical, and scalable. This is exactly what Iterable’s agents are designed for — purpose-built capabilities that automate tasks marketers can’t scale manually, from send-time optimization to channel routing to smart suppression. Together, these agents form the building blocks of agentic intelligence, where the system doesn’t just analyze but acts.

THE CHALLENGES MARKETERS FACE

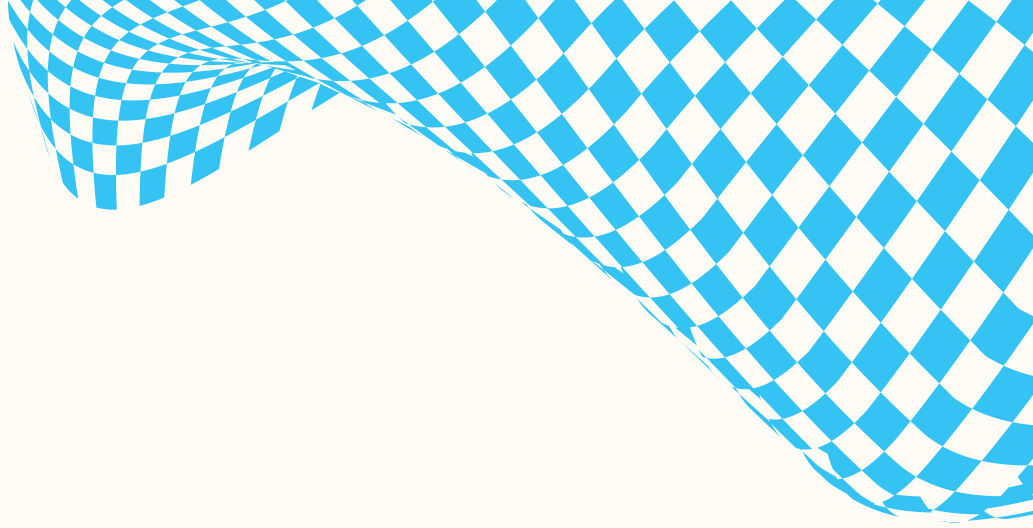
- » **Unclear path forward:** AI feels abstract. Teams hear the hype but don’t see a roadmap to practical adoption. Many tools overpromise but deliver black-box outputs that are hard to explain and even harder to scale responsibly.
- » **Fear of replacement:** Marketers worry AI will replace creative or strategic work, rather than amplify it.
- » **Missed moments:** Without embedded intelligence, opportunities slip by — because no human team can monitor every signal in real time.

THE MINDSET SHIFT

AI shouldn’t be treated as magic or a replacement for human creativity. It’s better understood as a muscle that augments intent: humans set the strategy and brand values, while AI delivers scale, speed, and pattern recognition. The winning model is human + AI in partnership — with agents executing predefined actions at scale, and agentic intelligence orchestrating them for optimal performance based on historical data and business intent.

CHEF’S NOTE

Think of AI as your sous-chef. It preps ingredients, spots what’s running low, and suggests variations — accelerating the process and ensuring consistency. But the chef (the marketer) still sets the vision, defines the dish, and tastes along the way. AI brings speed and precision; humans bring direction and creativity.



WHAT YOU NEED TO SUCCEED

1. Built-in best practices.

AI works best when it's woven into your existing workflows — not bolted on as an external tool. Marketers need systems where optimization techniques are embedded directly. Iterable's [Nova](#) brings these practices inside the environment marketers already use. The [Scheduling Agent](#) (send-time optimization), [Delivery Agent](#) (channel optimization), and Governance Agent (smart suppression + frequency caps) ensure consistency, efficiency, and guardrails at scale.

2. Human-in-the-loop orchestration.

For AI to be trusted, marketers must remain in control. That means setting the “why” and “what” while AI accelerates the “how” and “when.” Explainability is critical here: when marketers understand the strategy and intent behind a recommendation, they can confidently apply it without surrendering creativity. With Nova, this includes capabilities like [Next Best Action](#), which surfaces intelligent recommendations that marketers can guide and approve.

3. Continuous learning.

AI should improve with every interaction, spotting opportunities human teams can't monitor at scale. Systems need to surface alerts and proactive recommendations that would otherwise go unseen — and then learn from results to refine future decisions. Nova makes this possible by connecting intelligence to action across agents. For example, as the [Writing Agent](#) generates new variations or the [Responsive Activation Agent](#) adapts journeys, Nova continually learns and improves — closing the loop between action and performance.

Redbubble increased open rates by 30% with Iterable's Scheduling Agent and Brand Affinity insights.



Step 5: Turn strategy into revenue-critical action.

With unified data, adaptive journeys, modular content, and AI in motion, the final step is ensuring that the strategy actually reaches the customer. Too often, brilliant ideas get stuck in backlog queues, approval processes, or siloed execution. The result: strategies that look great on slides but never deliver impact in-market.

This is where **agents** and **agentic intelligence** prove their value: by closing the “last mile” of marketing. Agents carry out predefined actions at scale, while agentic intelligence coordinates them in real time against business goals, ensuring strategy doesn’t stall before reaching the customer.

THE CHALLENGES MARKETERS FACE

- » **Plans stuck in backlog:** Campaigns get delayed by approvals, tickets, or resourcing bottlenecks.
- » **Strategy divorced from execution:** Teams spend time designing playbooks that never translate into live, measurable results.

THE MINDSET SHIFT

In modern marketing, execution = strategy. Responsiveness isn’t just an operational advantage; it’s the new growth lever. Winning teams move from plan to market impact in days — not quarters — because agents eliminate bottlenecks and agentic intelligence ensures every action ladders up to meaningful business outcomes.

CHEF’S NOTE

Even the best recipe won’t matter if the meal never leaves the kitchen. Closing the gap between strategy and execution is like running the line in a busy restaurant: prep, plating, and serving all need to happen in sync. It’s not just about crafting the dish (strategy), but delivering it to the table at the right moment while it’s still hot (execution). The kitchen only succeeds when planning and action operate as one.

WHAT YOU NEED TO SUCCEED

1. Align goals to real business outcomes.

Marketers must tie strategy to metrics that move the business — not just vanity KPIs like open rates or clicks. Goals should be focused on revenue-critical outcomes like trial conversions, repeat purchases, subscription upgrades, or churn prevention. Iterable's [Predictive Goals](#) makes this possible, connecting journeys directly to pipeline and tracking progress in real time.

2. Close the activation gap.

The gap between planning and doing has to shrink. Teams need the ability to optimize while campaigns are live, not months later. Nova's agentic intelligence and [Customer Journey Agent](#) help marketers surface underperforming segments, pivot messaging, and activate adjustments instantly. It's a strategy designed, tested, and executed in one environment.

3. Operate a continuous flywheel.

Execution shouldn't be linear. The strongest teams treat every program as a cycle: learn → adjust → outperform → repeat. Iterable's agentic intelligence makes this cycle possible — agents execute actions at scale, while Nova's diagnostics and insights dashboards surface where to pivot next. The system then continues to optimize, with the Responsive Activation Agent adapting journeys in real time and the [Governance](#), [Scheduling](#), and [Delivery Agents](#) ensuring campaigns remain compliant, efficient, and on track — so the flywheel never stalls.

4. Elevate marketing operations.

Marketing ops can no longer act as just a governance checkpoint. Their role should evolve into building the systems that make speed and control possible. That means:

- » **Operationalizing best practices:** Using vetted [templates](#), [content blocks](#), and agents within Iterable to scale execution. Iterable's deliverability consultants and adoption services help teams design and optimize new CRM programs while ensuring strong inbox reputation.
- » **Embedding guardrails:** The Governance Agent enforces frequency caps and suppression automatically, while analytics partners like [Amplitude](#) and [Mixpanel](#) connect campaigns to outcome-driven insights, ensuring decisions support long-term growth.
- » **Extending bandwidth:** Professional services teams, customer success managers, and agency partners provide strategic guidance and executional support across CX, loyalty, media, and competitive differentiation — helping teams scale beyond internal limits.

[ClickUp](#) achieved a **9% increase in Net Dollar Retention** in just 5 months with Iterable.

Checklist: Operationalizing AI in Marketing

Now that you've assessed your marketing maturity and understand the five steps to becoming moment-ready, it's time to update any antiquated ways of working and prepare for the agentic AI era.

Here's a quick checklist to get started:

- ☐ Align business goals with critical moments in your customer engagement journey — then let [Predictive Goals](#) guide agents toward those outcomes.
- ☐ Redefine KPIs and benchmarks for the AI era — think beyond ROI to CLV and retention.
- ☐ Clarify which workflows are human-led vs. agent-executed — e.g., strategy and creative direction stay human, while agents handle send-time, channel mix, and suppression.
- ☐ Invest in AI literacy and adoption — Build confidence in using [Nova](#) and its suite of agents in everyday workflows.
- ☐ Test, document, and refine your learnings:
 - What worked well? _____
 - Where did agent-driven actions outperform? _____
 - What guardrails or skills do you need to scale with confidence? _____

If you want your martech stack ready to capture the moment, use the [Iterable Value Calculator](#) to receive a customized business case with projected growth and efficiency results for your company—based on real results from 1,000+ Iterable customers.



Key Takeaways

1. Scheduled sends are out—moments are in.

It's time to toss out the old campaign calendar and join the new era of dynamic, real-time, one-to-one customer engagement.

2. Moments have structure and purpose.

Every moment has five essentials: A goal, an audience, an action, an outcome, and an insight. Designing with these elements ensures every interaction is measurable, relevant, and repeatable.

3. Agentic intelligence unlocks scale.

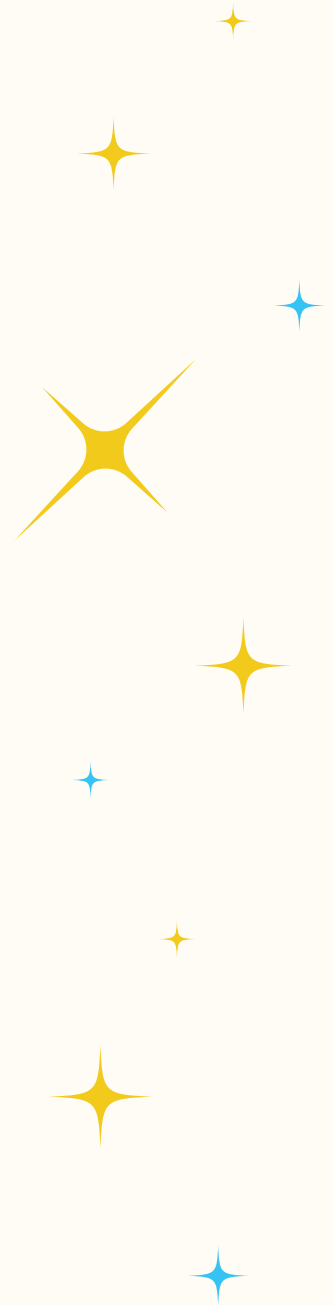
Iterable Nova is the intelligence layer that orchestrates specialized agents against marketing goals to scale everything from governance and content creation to delivery and continuous optimization.

4. You're only five steps away from major transformation.

By unifying data, redesigning journeys, scaling modular content, embedding AI, and closing the strategy–execution gap, marketers can create lasting impact in months, not years.

5. You don't have to go at it alone.

Iterable provides the platform, services, and partner ecosystem to help you operationalize AI and marketing best practices — so teams can design for growth from the ground up.



Frequently Asked Questions (FAQs)

1. What is moments-based marketing, and why is it replacing traditional batch-and-blast campaigns?

Traditional campaign calendars were built around brand schedules, not customer needs. Even with automation and personalization, batch-and-blast campaigns are still static — they don't flex as customers change.

Moments-based marketing flips this model. Instead of scheduled sends, it focuses on engaging customers in real time, powered by unified data, adaptive journeys, modular content, and agentic intelligence that surfaces the right audience and action.

The benefits go beyond relevance: according to the DMA, **triggered customer journeys drive 3x more revenue** than one-size-fits-all sends. By evolving from batch-and-blast campaigns to adaptive journeys, brands can:

- » Deliver individualized content that makes every customer feel like the only customer.
- » Improve satisfaction and loyalty.
- » Increase lifetime value, conversions, and engagement.
- » Elevate brand sentiment and turn users into fans.

2. What are the biggest challenges marketers face when trying to personalize at scale?

Personalization sounds simple — but scaling it across millions of customers in real time is anything but. According to our [2025 Activate survey](#), the biggest blockers to real-time personalization include:

- » **Fragmented data (33%)** → Customer signals are scattered across disconnected tools, making it hard to build a unified view.
- » **Limited technical resources (20%)** → Teams lack the engineering support needed to activate data and automate personalization.
- » **Under-resourced marketing teams (18%)** → Lean teams struggle to keep up with the growing demand for one-to-one engagement.
- » **Team silos (7%)** → Editorial, growth, and regional teams work in isolation, preventing shared learning and collaboration.
- » **All of the above (20%)** → For many organizations, it's not one challenge — it's the combination that slows execution.

This is where [agents](#) help. Iterable's [Governance](#), [Scheduling](#), and [Delivery Agents](#) automate tasks that normally drain bandwidth, while the [Customer Journey](#) and [Responsive Activation Agents](#) adapt experiences in real time — giving lean teams the scale they need without massive technical overhead.

3. How can AI help my marketing team if we don't have a lot of technical resources?

AI isn't just for enterprises with big data science teams. When resources are tight, the problem isn't strategy — it's scale. You may know what needs to happen, but don't have the bandwidth or engineering support to do it. That's where agents come in.

Each agent in Iterable automates a piece of execution that normally drains time:

- » The **Governance Agent** handles suppression and frequency caps
- » The **Scheduling** and **Delivery Agents** optimize when and where messages are sent.
- » **Writing Agent** generates content variations in seconds.

But execution alone isn't enough. Nova's agentic intelligence continuously analyzes signals, surfaces insight-driven recommendations through **Predictive Goals** and **Next Best Action**, and then directs the right agents to carry them out.

The result: even lean teams can move from static campaigns to intelligent, adaptive marketing — scaling personalization and optimization without adding headcount or technical debt.

4. What's the easiest way to begin building more adaptive customer journeys?

The best place to start is small — with signals you already have. Instead of planning another static campaign, pick one high-value behavior and build a journey around it. For example:

- » When a cart is abandoned, the **Responsive Activation Agent** triggers a timely reminder.
- » As a renewal date approaches, the **Customer Journey Agent** steps in with a retention offer.
- » If a milestone like 30 days of inactivity is reached, the **Scheduling** and **Delivery Agents** adjust timing and channel to re-engage at the best moment.

Nova's agentic intelligence keeps these agents coordinated, spotting where journeys are likely to stall and recommending pivots before performance drops. That way, your first adaptive journey isn't just reactive — it's proactively intelligent.



5. How is Iterable's AI different from other solutions?

Most platforms treat AI as an add-on. Iterable takes a different approach. [Nova](#) and the [six autonomous agents](#) are built directly into the platform to handle execution at scale. This makes AI not just embedded, but actionable in every workflow.

Here's what sets Iterable apart:

- » **Transparent and Explainable AI** → Marketers no longer have to second-guess what's driving a recommendation.
- » **All Screens. One Platform.** → Iterable centralizes data and AI-driven insights into robust customer profiles that activate across every channel.
- » **Open and Flexible** → Seamlessly ingest, integrate, and unify data from any source using SDKs, open APIs, and ETL solutions.
- » **Cloud-Native and Built for AI Scale** → Designed from the ground up to handle massive data volumes and deliver performance in real time.

[Request a demo](#) of Iterable to learn why our agentic intelligence is the foundational advantage for AI-powered marketing.



About Iterable

Iterable is the AI-powered communication platform that organizations trust to build deeper customer relationships through personalized, real-time engagement. With Iterable, leading brands like Priceline, Fabletics, Blockchain, and GitLab deliver seamless cross-channel experiences by turning data into action and continuously optimizing for maximum impact. Because the future of marketing isn't about sending more campaigns—it's about creating moments that matter. Learn more at www.iterable.com.

