ITERABLE

The New Era of Moments-Based Marketing

How to Ditch Your Campaign Calendar and Evolve Your Marketing Maturity
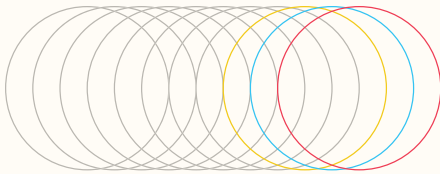
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The Death of the Traditional Campaign

Customers today live in an always-on world, and they expect brands to understand them. They're digitally native and super-savvy—they know what data you have, and if they're going to willingly exchange it, they expect you to use it properly.

The static campaign calendar doesn't deliver on this promise and certainly doesn't move at the speed of your audience. Batch-and-blast sends are driven by the marketer's schedule—not the customer's reality.

Marketers want to give the people what they want, but significant challenges are holding them back from real progress.

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.	**54%** of marketers say their biggest challenge is building a multi-channel strategy.	Marketing budgets have declined by **15%** year-over-year.
~ Statista, 2023	~ Ascend2, 2023	~ Gartner, 2024

We're at a pivotal moment, one where AI is driving one of the most profound technological shifts of our time. But it's not enough for marketing technology to simply bolt AI onto outdated systems. In fact, 38% of marketers surveyed at Iterable's **2025 Activate Summit** are still relying on off-platform AI tools rather than a responsive system that's specifically aligned to their goals.

It's time to make a clean break from the past and move beyond traditional, brand-first tactics. The future is **moments-based marketing**—an era of true, one-to-one communication where every customer feels like your only customer.

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

What Makes a Moment?

Every experience is composed of individual moments. As marketers, we need to create a responsive environment that allows customers to choose their own adventure.

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

1. An audience: who is experiencing this moment?

2. An action: when do they experience this moment, and what triggers it?

3. A goal: what's the intended measurable outcome?

By framing experiences using this lens, you can rethink communications from the viewpoint of your customer. Try completing this sentence for your brand:

*When **AUDIENCE** does **ACTION**, we want them to accomplish **GOAL***
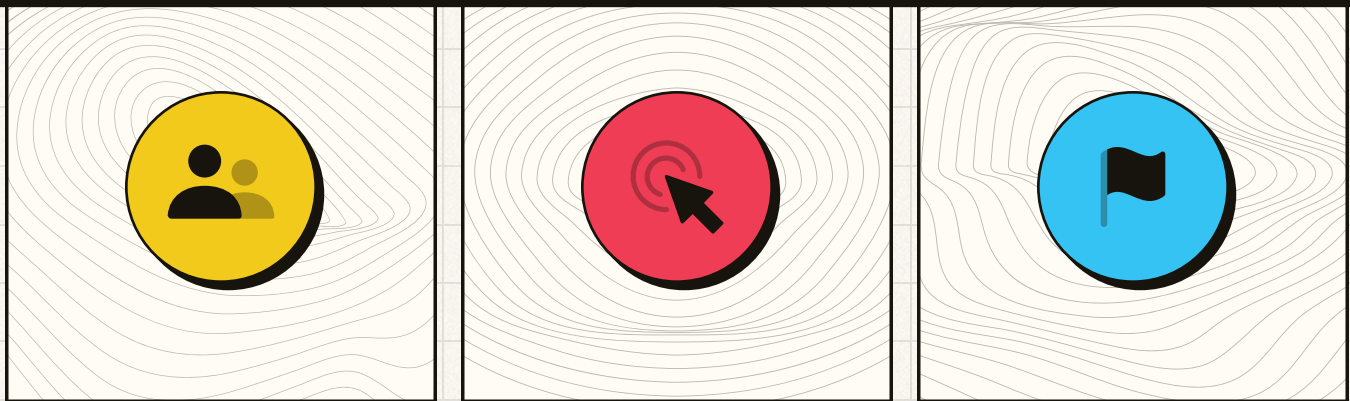
65% of customers cite targeted messaging as their top reason to make a purchase. Brands that get all three of these core elements right and harness the power of moments-based marketing will turn their users into loyal fans.

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

But no organization goes from rigid, scheduled sends to delivering magical moments overnight. In the next section, you'll assess your marketing maturity, determine what stage of transformation you're in, and chart next steps to creating wow-worthy experiences.

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**
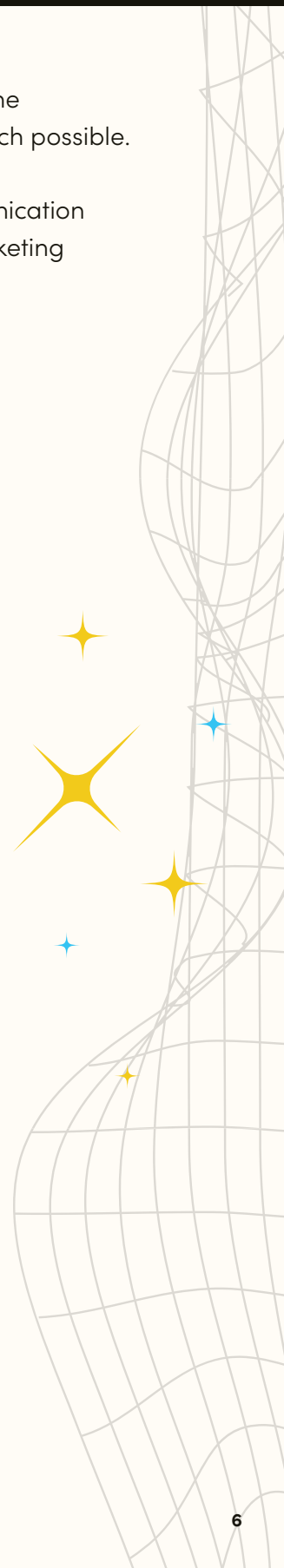
What does your team actually optimize for?

- ○ 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. This guide will show you how to evolve your strategy.

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.

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.

The 4 Steps to Being Moment-Ready

The good news is that marketers no longer have to rely on clunky and unscalable manual processes to make their customers feel like they're a brand's only customer. Instead, they can build integrated experiences and engagement efforts that give them faster access to data, better insights, and smarter decision-making (without the trade-offs).

Here are the steps you can take to shift to a moment-ready approach.

1. Activate Your Data

The Struggle: Customer data is fragmented across teams and tools, making it difficult to access and manage. This slows marketers down and limits their ability to adapt to their audiences in real-time.

SURVEY SAYS   *66% of marketers describe their data management as "inconsistent" or "messy." Only 4% reported strong data hygiene, and 9% did not know enough about their data to answer.* (Source: **Activate 2025**)

The Solution: To be moment-ready, modern architecture must be cloud-native, API-first, and AI-powered. This ensures that your technologies can vertically integrate into the larger martech ecosystem and activate customer data in real-time for instantaneous decisioning and responsiveness.

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

93%
Reduction in tech resources

JOYBIRD

80%
Number of email templates reduced

StanleyBlack&Decker

89%
Reduction in campaign setup time, dropping from 4 weeks to 3 days

grammarly

2. Engage Your Customers 1:1

The Struggle: In the era of moments-based marketing, "Hi {First Name}" isn't going to cut it. But even when your data is unified, it's not easy engaging customers on a truly one-to-one level, especially not in a way that doesn't suck up all your time and energy.

SURVEY SAYS
The biggest blockers to real-time personalization, according to marketers, are fragmented data (33%), a lack of technical resources (20%), an under-resourced marketing team (18%), and team silos (7%). Another 20% of survey respondents say it's all of the above. (Source: **Activate 2025**)

The Solution: Using intelligent, modular content design, today's AI-powered platforms set the proper foundation for personalization. This allows you to centralize your asset management and test AI-driven decisioning, reaching users in real-time.

These platforms support adaptive strategies that use live data from any source to personalize every message based on user actions and preferences. With Iterable's dynamic content and partners like **Movable Ink** and **Jacquard**, you can make every send feel relevant in just a matter of minutes.

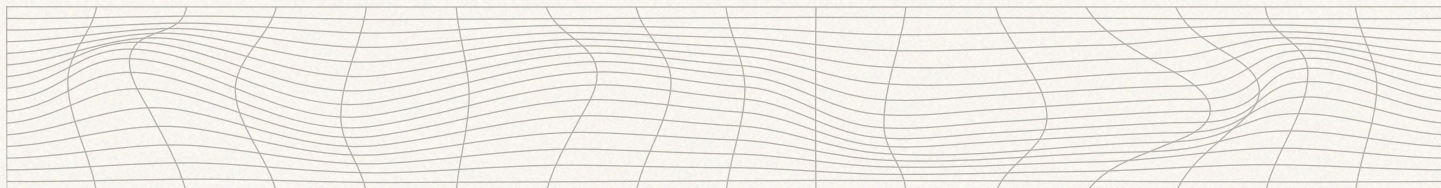# 156%
Increase in conversions with Iterable's

BIG4
HOLIDAY PARKS

25%
Marketer time savings with Iterable AI

care.com

20%
Event registrations from contacting only 10% of their audience

MORNING BREW

3. Reach Audiences Where They Are

The Struggle: Your customers don't interact with your brand through a single channel. They're browsing on mobile, engaging via email, shopping on your website, and scrolling through social media—all in the same day. But most marketing platforms weren't built to handle this kind of behavior. Instead, they bolt on channels as an afterthought, which leads to disconnected messaging, incomplete customer journeys, and clunky workflows.

SURVEY SAYS *64% of marketers say at least 70% of their messaging is still batch-and-blast. Only 6% say they're mostly moments-based with less than 30% of their messaging as batch-and-blast.* (Source: **Activate 2025**)

The Solution: Native cross-channel solutions are built to orchestrate all of your marketing—email, push, SMS, in-app, social, and more—in one unified place. Quickly create messages for every screen, so you can execute dynamic, cohesive experiences that drive recognition and continued engagement.

One often overlooked channel is direct mail, which boosts ROI by 18% when used in conjunction with digital channels. Iterable's direct mail partners like **Lob** and **PFL** make sending personalized postcards a piece of cake, for a frictionless cross-channel strategy.
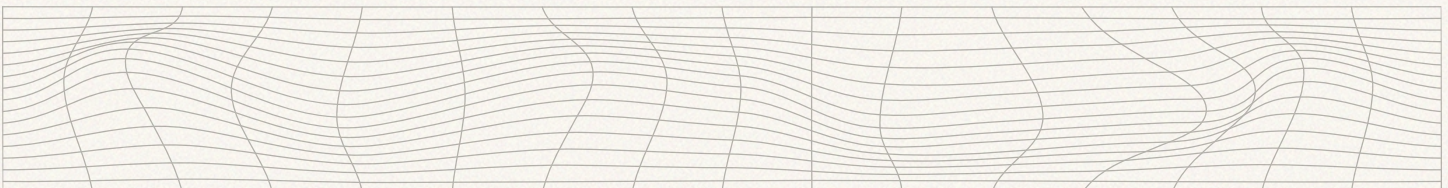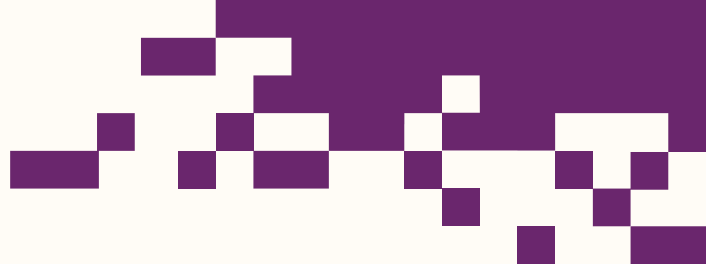
12x
More users reached

box

2.5x
Higher lifetime value from customers with two or more marketing opt-ins

FABLETICS

77%
Increase in trading volume from cross-channel engagement

Flipster

4. Optimize Your Performance in Real-Time

The Struggle: Most marketers are still stuck measuring campaign success after the fact, and that's too late. Adaptability is everything when it comes to avoiding message fatigue and driving loyalty with your audience.

SURVEY SAYS *The top business goals that marketers optimize for are revenue (52%), customer lifetime value (19%), and new customer acquisition (10%). 19% of marketers are unclear on what their team is actually optimizing for.* (Source: **Activate 2025**)

The Solution: Optimizing means more than fine-tuning—it's about transforming your entire approach with experimentation. AI agents use intelligent decisioning, so they never stop monitoring and analyzing patterns to make proactive adjustments and content adaptations.

This always-on strategy keeps you on track with your goals, instead of course-correcting after your latest campaign flop. Iterable's analytics partners, like **Mixpanel** and loyalty engines like **Talon.One**, stack the deck in your favor by helping you develop smarter strategies and achieve predictable success.

33%
Decrease in opt-outs within one month with Brand Affinity

realself.

30%
Open rate increase with Send Time Optimization

REDBUBBLE

15%
Lift in active buyers with Predictive Goals

REDFIN

Checklist: Operationalizing AI in Marketing

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

Here's a quick checklist to get started:

☐ Align business goals with critical moments in your customer engagement journey

☐ Redefine your KPIs and benchmark metrics for the AI era (**ROI vs. CLV**)

☐ Distinguish which engagement workflows are human-led vs. AI-assisted

☐ Invest in AI skill development and adoption to build a culture of AI literacy

☐ Identify one manual task for AI redesign (e.g., audience building or content creation)

☐ Test and document your learnings:

- What worked well? _____

- What gaps still exist? _____

- What additional skills and tools do you need to scale? _____

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.

Introducing Nova: The Future of Marketing

COMING THIS FALL

It's clear that marketing has changed, but most platforms haven't. That's why we built **Iterable Nova**, an AI agent for moments-based engagement. With Nova, Iterable isn't just adding AI—we're re-architecting how marketers work.

Nova was designed to be:

» **Prescriptive:** Nova is your intelligent advisor, offering personalized, data-backed recommendations based on your industry, goals, and customer behavior. No more analysis paralysis—just actionable clarity.

» **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.

» **Goal-Based:** No more guesswork. Define your business outcomes—whether it's boosting conversions or driving revenue—and Nova takes the lead, experimenting and adapting to maximize results.
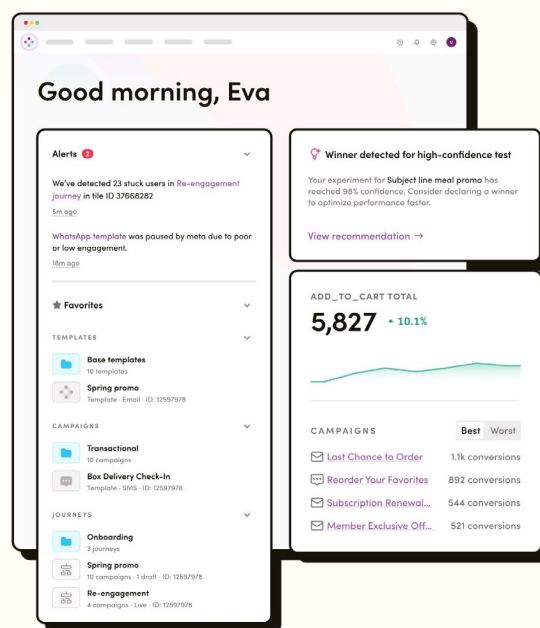
The Benefits of Iterable Nova

ACHIEVE GOALS FASTER	STAY ON TRACK	SCALE SMARTER	IMPROVE PERFORMANCE
Use conversational AI to describe your objective and let Nova do the heavy lifting	Continuously monitor your marketing performance with Nova as your always-on strategist	Generate high-performing content with higher precision and faster than ever	Take the next best action with Nova's recommendations and automate the path to execution

If you're ready to team up with Nova, Iterable's new AI-powered marketing advisor, let's talk. **Get in touch today** to turn strategy into action, and insights into impact, across every channel.

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 marketing moment must include an audience, an action-based trigger, and a measurable goal. Brands that design personalized messages around these core elements will create experiences that resonate and convert.

3. Strategies aren't overhauled overnight.

Iterable's marketing maturity framework helps teams assess where they are on the path to becoming moment-ready and identify concrete steps to improve.

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

Once you activate your data, engage customers in 1:1 interactions, reach audiences where they are, and optimize performance in real-time, you're on your way to capturing the right moments.

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

With **Iterable Nova** by your side, you have an AI-powered advisor to guide you to marketing success.

Frequently Asked Questions

1. What is moments-based marketing?

The **last fifteen years of marketing** have been defined by the campaign calendar, where messages became automated and personalized, but still scheduled in a static, batch-and-blast manner.

We have now entered the era of **moments-based marketing**, where customers expect brands to engage in real-time—not wait for next week's newsletter. Powered by AI, moments-based marketing makes adaptive engagement possible.

Data is unified, channels are orchestrated, and content is personalized dynamically. This is marketing that moves at the speed of customers—delivering the right message, in the right moment, every time.

2. What are the benefits of switching batch-and-blast campaigns to triggered customer journeys?

According to the DMA, **triggered customer journeys** drive **3x more revenue** than one-size-fits-all sends. By evolving your marketing maturity from batch-and-blast campaigns to triggered journeys, you can engage your audience in real time.

This allows you to deliver content that's relevant and individualized, making every customer feel like your only customer.

The benefits of switching to triggered journeys include improving customer satisfaction, increasing lifetime value, and achieving higher conversions and engagement, thereby elevating your brand sentiment and turning users into loyal fans.

3. How do I know if my team is ready for moments-based marketing?

By taking Iterable's **marketing maturity assessment** in this guide, you can determine where your organization is on its path to personalization. If your team scores high in data hygiene, AI readiness, and long-term strategic thinking, you're likely moment-ready.

A lower score doesn't mean you can't prepare for moments-based marketing. We can help you identify opportunities to optimize your processes and technology stack. **Get in touch** to get started.

4. How does AI play a role in moments-based marketing?

AI plays a pivotal role in moments-based marketing: research shows that brands using AI-driven personalization see a **20% increase in marketing ROI**. AI technology can help you generate individualized content, orchestrate cross-channel journeys, and automate optimization—all in real time.

That said, it's not enough to bolt on AI to legacy martech platforms. Most AI tools are black boxes that don't explain their own logic, so it's important to seek solutions that are natively designed with **Explainable AI**, where every decision comes with clear, transparent reasoning.

How AI is integrated is what separates leaders from followers. Make sure you avoid retrofitted legacy systems and instead look for cloud-native architecture that is built from the ground up to support AI at scale.

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

Iterable is the most powerful data activation engine for AI-driven marketing. AI isn't an add-on—it's fully embedded and optimized across our platform.

Here's what sets Iterable's AI apart from the rest:

» **Transparent and Explainable AI.** Marketers no longer have to second-guess what is driving AI decisioning.

» **All Screens. One Platform.** Iterable centralizes data and AI-driven insights to create robust customer profiles that can be activated cross-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.** Iterable's cloud-native architecture is designed from the ground up to handle massive volumes of data.

Request a demo of Iterable to learn why our data engine is the foundational advantage for AI-powered marketing.