ITERABLE

Your Checklist for Unlocking the Power of AI

How to Embed Agentic Intelligence into Every Layer of Marketing

AI isn't just adding new features — it's rewriting how marketing works. With **agent-based automation** and intelligent decisioning taking center stage, marketers finally have the tools to engage customers in real time, at scale, and with precision. Yet many teams remain stuck in **outdated tactics and practices**—manual, rigid, and increasingly disconnected from customer behavior.

27%
of CMOs feel their operating model can deliver on marketing objectives.

(McKinsey & Co., 2025)

74%
of companies still struggle to scale value from AI investments.

(BCG, 2024)

67%
of marketers cite lack of training as the top barrier to AI success.

(Marketing AI Institute)

63%
of a marketer's day is spent on tasks that could be automated.

(Funnel, 2024)

This checklist helps you pinpoint high-impact entry points to embed AI into your strategy, data, workflows, and intelligence layer, unlocking a level of speed, precision, and adaptability your competitors can't keep up with.

Strategy

To harness AI effectively, your strategy needs to align business outcomes with the moments that shape customer behavior.

Map customer moments to business goals.

☐ Identify the moments that impact outcomes (e.g., trial expiration, renewal reminders, inactivity milestones).

☐ Tie each moment to a business goal — conversion, retention, upsell, churn prevention.

> *Check out our [**Behavioral Triggers Cheat Sheet**](#) for inspiration on how to identify and activate key customer moments.*

Redefine KPIs for AI-driven engagement.

☐ Move beyond output-based metrics (click-through rate, send volume, open rates).

☐ Prioritize impact metrics that show business value:

- **CUSTOMER LIFETIME VALUE (CLV):** Total revenue a customer generates over their relationship with your brand.

- **RETENTION AND ENGAGEMENT LIFT:** Percentage increase in customer retention or engagement compared to a baseline.

- **CONVERSION VELOCITY:** Average time it takes for a customer to progress from first touch to desired action.

- **NET DOLLAR RETENTION (NDR):** Percentage of recurring revenue retained after accounting for upgrades, downgrades, and churn.

- **OPERATIONAL EFFICIENCY GAINS:** Reduction in time, cost, or manual effort achieved through automation and agentic execution.

Data

Intelligence isn't powered by how much data you have, but how fast it moves. When information is unified and signals flow freely, AI can reason, react, and adapt in real time.

Unify customer signals.

- [ ] Consolidate behavioral, profile, and event data into a single source of truth — ideally through a cloud data warehouse (CDW) that feeds a unified profile, or whichever connected systems best fit your architecture.

- [ ] Maintain ongoing hygiene checks. Clean data equals smarter agent execution.

- [ ] Prioritize tools with full lifecycle data so your AI has the history it needs to predict and personalize at scale.

> *Iterable's **Smart Ingest** simplifies real-time data ingestion, enabling marketers to activate fresh customer signals instantly.*

Design for speed and access.

- [ ] Build a cloud-native stack that enables data to move frictionlessly between systems through APIs, SDKs, and webhooks.

- [ ] Enable ingestion-to-activation cycles in seconds—not hours—with real-time profile updates, triggers, and content swaps.

- [ ] Give marketers the autonomy to act on live data without waiting on engineering bottlenecks.

> *Anyfin saw a **10x boost in abandoned cart conversions** by activating real-time data through Smart Ingest.*

Execution

AI isn't just about working faster — it's about scaling intelligently without adding headcount or manual bottlenecks. By embedding agentic capabilities into your workflows you can remove the repetitive tasks and allow agents to do it, no more operational drag.

Scale creative without slowing down.

- [ ] Build a **content library** organized by segment, product category, lifecycle stage, and other dynamic variables.

- [ ] Personalize experiences on the fly with modular content blocks, adapting to each customer's context without rebuilding assets.

- [ ] Automate testing and optimization of copy, creative, and offers to keep messaging fresh and high-performing.

> Iterable's **Writing Agent** dynamically generates and tests copy variations at scale, while **Snippets and Templates** personalize content in real time.

Engage correctly every time.

- [ ] Use AI to detect engagement patterns across massive datasets and anticipate customer readiness.

- [ ] Apply contextual intelligence to optimize when, where, and how each customer is most likely to engage.

- [ ] Eliminate redundant, manual work while agents ensure every interaction hits with precision.

> Iterable's **Scheduling Agent** pinpoints optimal send times, **Delivery Agent** selects the best channels, and the **Responsive Activation Agent** triggers engagement at the exact right moment.

Protect the brand and stay compliant.

- [ ] Use AI to detect fatigue and overexposure patterns before they impact engagement.

- [ ] Automate guardrails around frequency, suppression, and compliance to safeguard reputation and trust.

- [ ] Ensure regulations and internal policies are consistently enforced without manual oversight.

> Iterable's **Governance Agent** enforces frequency caps, smart suppression, and compliance rules automatically — protecting your brand while keeping operations efficient.

Intelligence

Automation moves fast. Intelligence moves fast with purpose. This is where predictive models, contextual reasoning, and intelligent orchestration unlock marketing that anticipates, adapts, and explains why.

Direct agents toward shared goals.

☐ Align every agent's action to a single set of measurable business objectives — avoiding competing signals or inefficiencies.

☐ Build a shared intelligence layer that keeps journeys adaptive and coordinated without channel-specific siloes.

*Iterable's **Nova** powers contextual intelligence to orchestrate agents in real time, while **Predictive Goals** aligns those actions to customizable business outcomes — from retention and revenue to engagement or churn prevention.*

Make every action transparent and defensible.

☐ Eliminate black-box automation by ensuring every AI-driven action comes with contextual reasoning you can see, defend, and trust.

☐ Understand triggers and their expected impact in language that can be communicated to stakeholders and leadership.

*Iterable's **Next Best Action** surfaces explainable recommendations backed by transparent logic, giving teams confidence in how AI supports their business goals.*

Close the loop between signal and optimization.

☐ Capture and interpret engagement signals to understand customer sentiment.

☐ Use predictive models to identify intent-rich segments and surface opportunities before they stall.

☐ Feed those performance signals back into the intelligence layer to continuously refine targeting, sequencing, and strategy.

*Iterable's **Customer Journey Agent** adapts live journeys based on these evolving insights, while **Brand Affinity** translates behavioral patterns into dynamic engagement scores for smarter optimization over time.*

Culture

The technology only works as well as the people who trust it. Building organizational fluency around predictive models, agent behavior, and reasoning is critical for long-term success.

Create cross-functional alignment.

- ☐ Form an AI council across marketing, product, data, and IT.
- ☐ Define governance, privacy, investment, and usage guidelines for agentic systems.

Upskill and hire strategically.

- ☐ Identify skill gaps across marketing, ops, tech, and data teams.
- ☐ Develop training tracks in model tuning, prompt engineering, conversational design, agentic automation, and AI ethics/compliance.
- ☐ Hire for strategic roles in journey orchestration, AI content strategy, and enablement.

> *Leverage **Iterable Academy**, **Plaza**, and user groups to build AI fluency across teams.*

Foster a continuous test-and-learn mindset.

- ☐ Launch low-risk pilots and innovation sprints to build confidence in agentic workflows.
- ☐ Celebrate learnings, not just wins — encourage iteration and sharing of insights.
- ☐ Build internal AI champions who can drive cultural adoption and best practices.

Make AI Work for You — Starting Now

AI transformation doesn't have to be massive to be meaningful. Start with what matters most:

- Identify one high-value moment
- Rebuild the workflow with **Iterable's AI agents**
- Eliminate manual steps
- Test, learn, repeat

Your marketing isn't falling short because you lack AI, but because AI hasn't yet reshaped how your team plans, executes, and iterates. Use this checklist to begin embedding intelligence across every layer of your operation—from orchestration to content to culture.

To learn more about Iterable's AI agents, including **Nova**—your new co-pilot for moments-based marketing—**schedule a demo** today.

ITERABLE