

ITERABLE

# Building the Bridge to Your Moment-Based Marketing Strategy

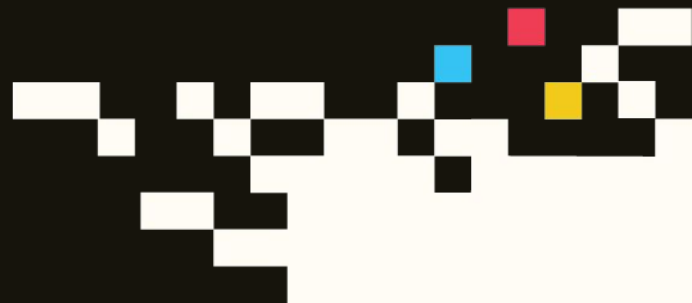


# Andrew Hagen

Director, Solutions Marketing



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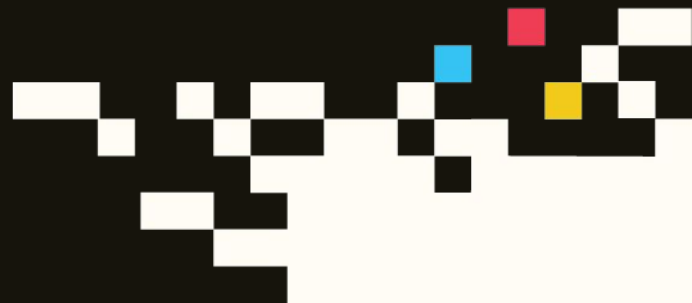


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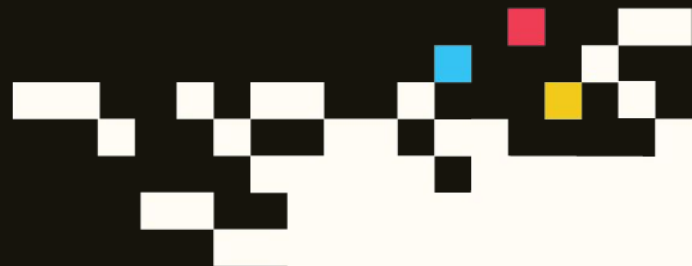


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# Moments



# Moments



A romantic moment between a bride and groom. The bride has voluminous, dark, curly hair and is wearing a white lace wedding dress. She has intricate black tattoos on her left arm. The groom is wearing a dark grey suit jacket and a white shirt with a patterned scarf. They are standing outdoors, with a blurred background of trees and a wooden structure. The word "Moments" is written in a bold, yellow, sans-serif font across the center of the image. In the bottom left corner, there is a decorative graphic of yellow and black squares in a pixelated, staircase-like pattern.

**Moments**



**Moments**





# Moments





**Awareness**



**Consideration**



**Conversion**



**Loyalty**



# The Challenge

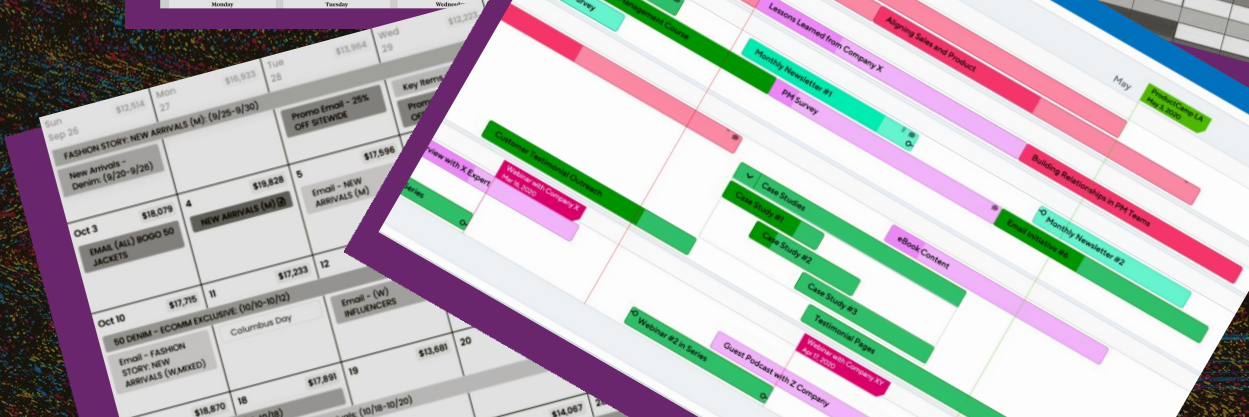
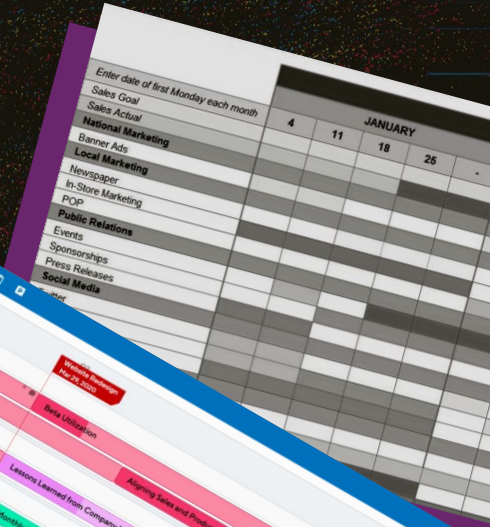
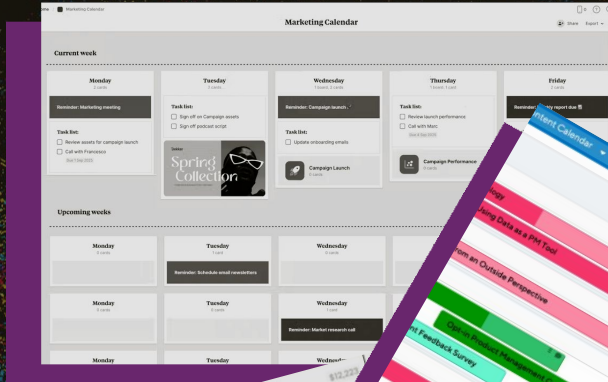
# The Campaign

Goal

Idea

Brief

Audience



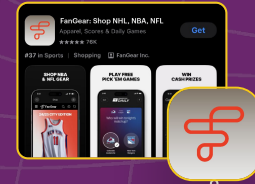
# The Rigidity of Campaign Planning & Execution creates a disconnect between the brand and customer

## USER SIGNALS & ACTION

🔍 Browse Favorite Teams

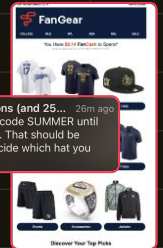
🛒 Add Jersey to Cart

📱 Download the App



## FINAL HOURS

Decisions, decisions (and 25... 26m ago)  
Take 25% off with code SUMMER until 5/20 11:59 p.m. ET. That should be enough time to decide which hat you want... right?



📣 Sale Announcement

📣 Time Running Out

📣 Last Chance

## BATCH & BLAST ENGAGEMENT



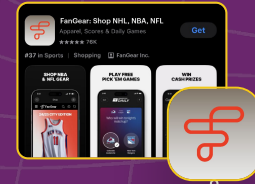
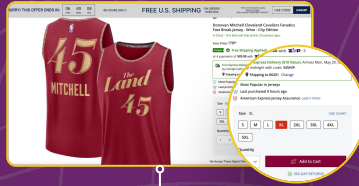
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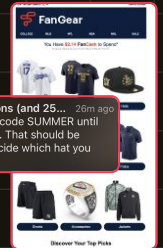
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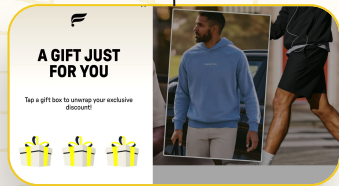
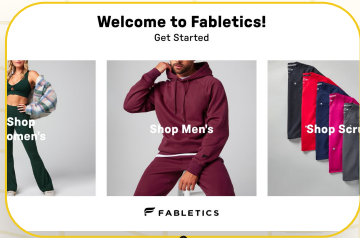
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## BATCH & BLAST ENGAGEMENT

# Moment Based Marketing allows brands to seamlessly connect with customers like they are their only customer

## INTEGRATED EXPERIENCE AND ENGAGEMENT EFFORTS

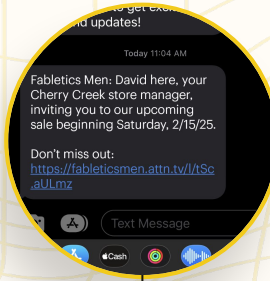
### Quiz: Category Interests



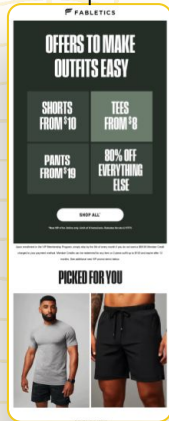
### Dynamic in-browse offer



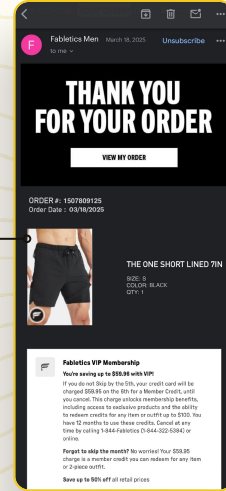
### Personalized Web Experience



### Local store manager promotional SMS for upcoming sale

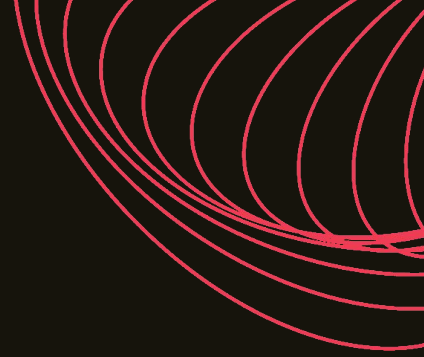


### Individualized Email Highlighting Offer

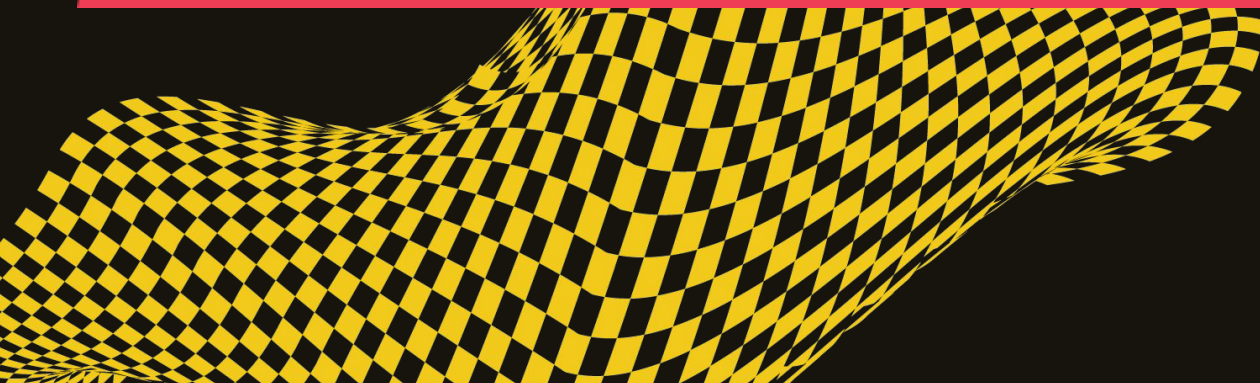


### Transactional Receipt Email for the shorts promoted





***BREAKING DOWN THE BARRIERS...***



### ANTIQUATED WAYS OF WORKING

CMOs feeling their operating model is fit to deliver on objectives

**27%**

**MCKINSEY & COMPANY**

### FRACTURED DATA SILOS

Marketer Reported Use of Personalization

Email

**78%**

Mobile

**31%**

**STATISTA**

### COMPLEXITY OF PERSONALIZED CONTENT

Executives citing scalable content creation as the largest barrier to personalization

**42%**

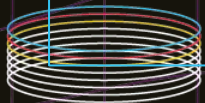
**STATISTA**

### NEVER ENDING MANUAL TASKS

Marketer time spent on manual tasks that could be automated

**63%**

**FUNNEL**

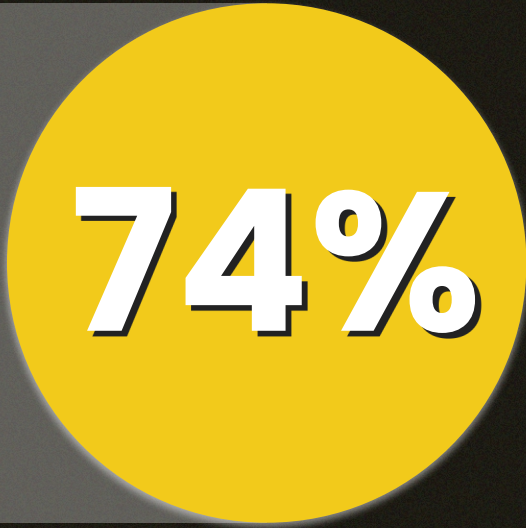
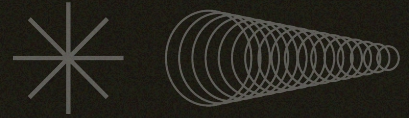






**While Innovative Brands are  
rethinking their approach**

**Transformation doesn't  
happen overnight**

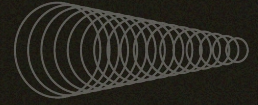


Companies struggling to achieve  
and scale value from AI today

***BOSTON CONSULTING GROUP | 2024***







Organizations cite lack of training  
as the primary barrier to AI  
Adoption & Value

**MARKETING AI INSTITUTE | 2024**

**67%**







# 4 Steps

## Building the Bridge to Moment Based Marketing



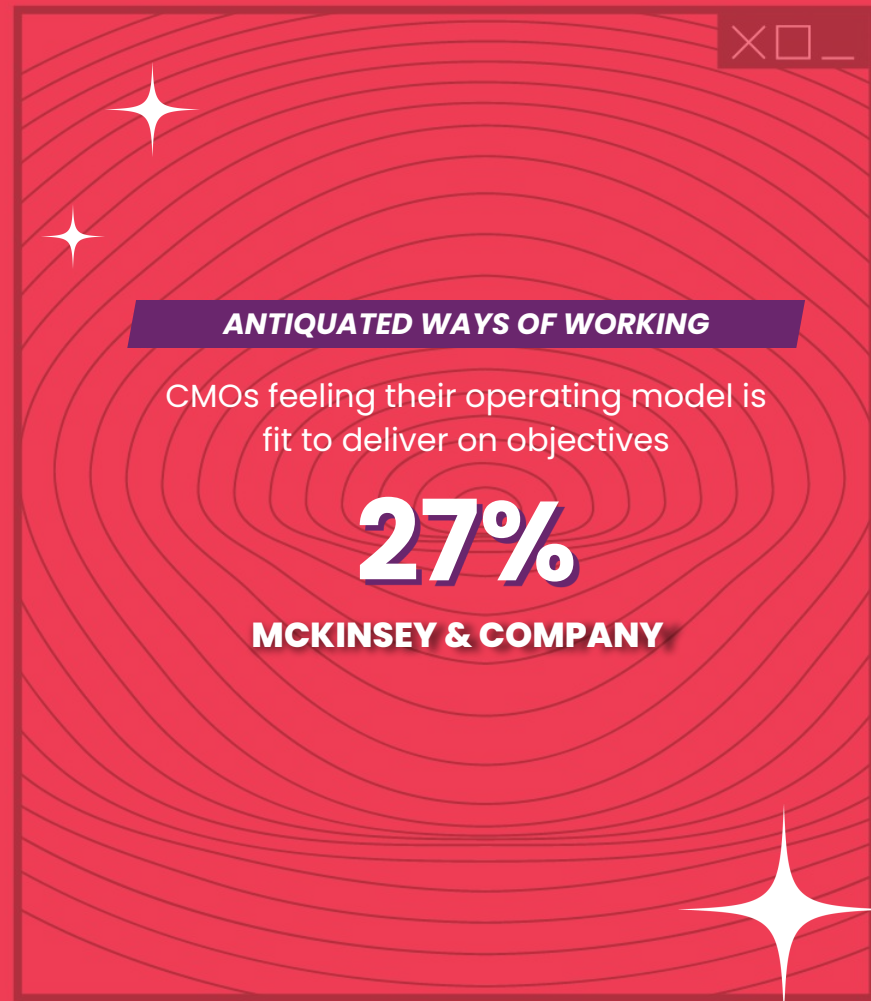


# 1. Evolve The Operating Model

Redefine, Document, and Test for Success

- **Map Your Moments.**

Align business goals to critical moments in the customer journey for engagement



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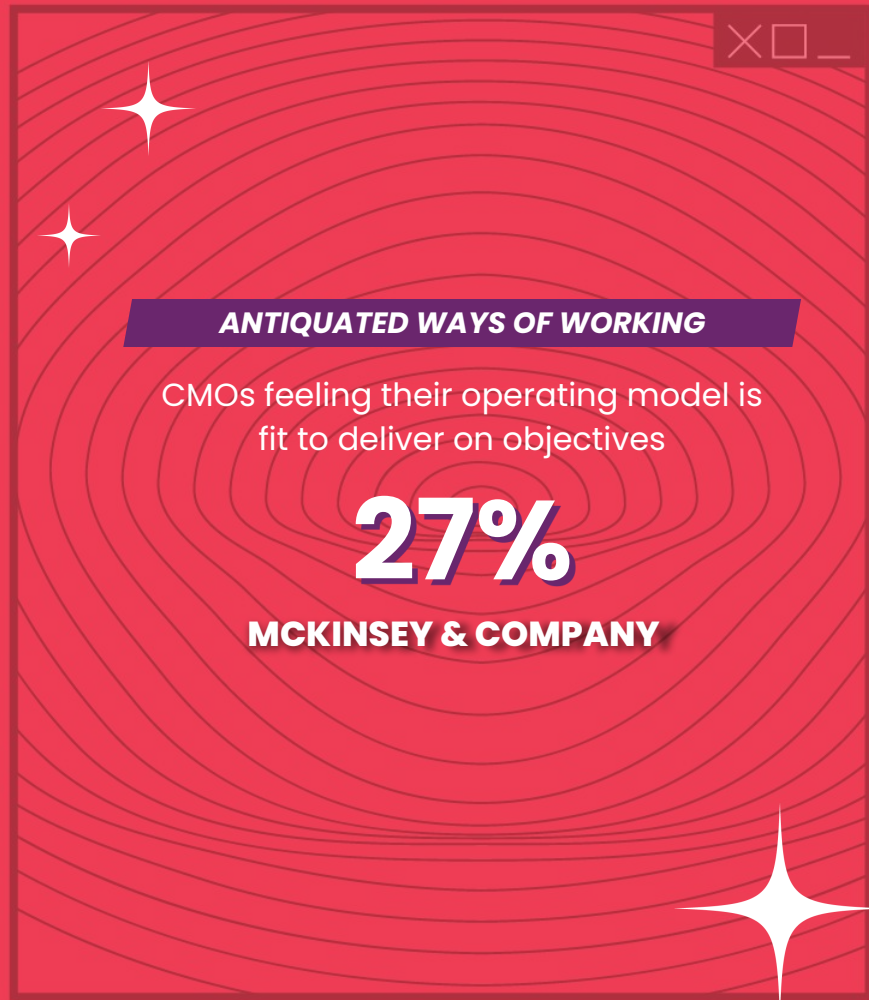
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Evaluate updated benchmark metrics *Return on Employee, Automation Index, FI Scores*





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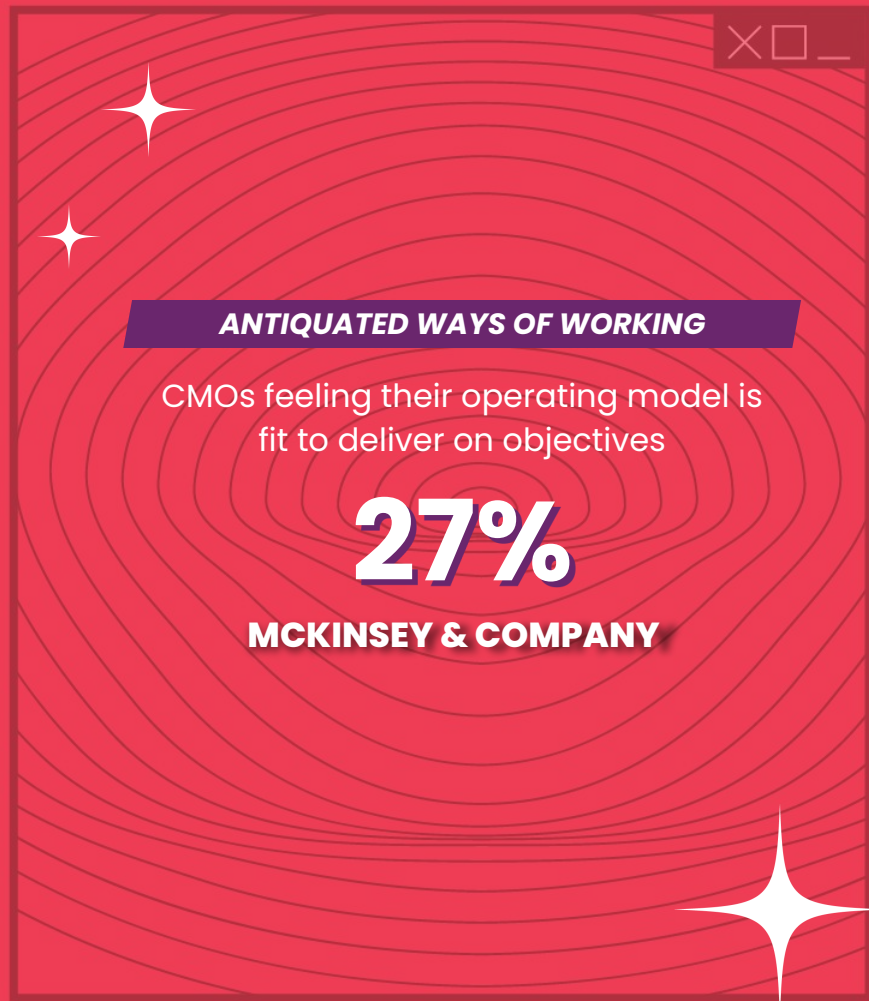
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- **Redefine Workflows**

Document process for guided AI assistance & human intervention for brand engagement



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**Predictive Goals** ITERABLE AI

Start from a common business goal

- Likely to engage**: Predict which users are most likely to click and engage with your brand
- Likely to churn**: Predict which users are most likely to unsubscribe or cancel membership
- Likely to purchase**: Predict which users are most likely to make a purchase

Predictive goal	User profile field	Status	Last modified	Last refresh	Predictive strength
BMSClick (ID: 1625)	mscClick	Ready	3/18/2024, 10:00 AM Created 3 years ago	N/A	Strong fit
Second Purchase (ID: 1667)	secondPurchase	Ready	Today, 12:30 AM Created 3 years ago	N/A	Strong fit
Predict Purchase (ID: 1675)	predictPurchase	Ready	2/27/2024, 12:00 AM Created 3 years ago	N/A	Strong fit
Lamps Plus Purchase (ID: 1543)	LampsPlusPurchase	Ready	4/12/2024, 12:00 AM Created 3 years ago	N/A	Strong fit

**Predictive Goal-based Journey**

Generate Journey

Generate Journey

Describe the journey you want to create, or select a starter template.

Welcome journey | Reassigned user journey

Messages

- Email
- Push
- Web
- Web push
- SMS
- Webhook
- Other
- Automation

Delays

- Time delay
- Hold until

Filters and flow

- Header split
- A/B split

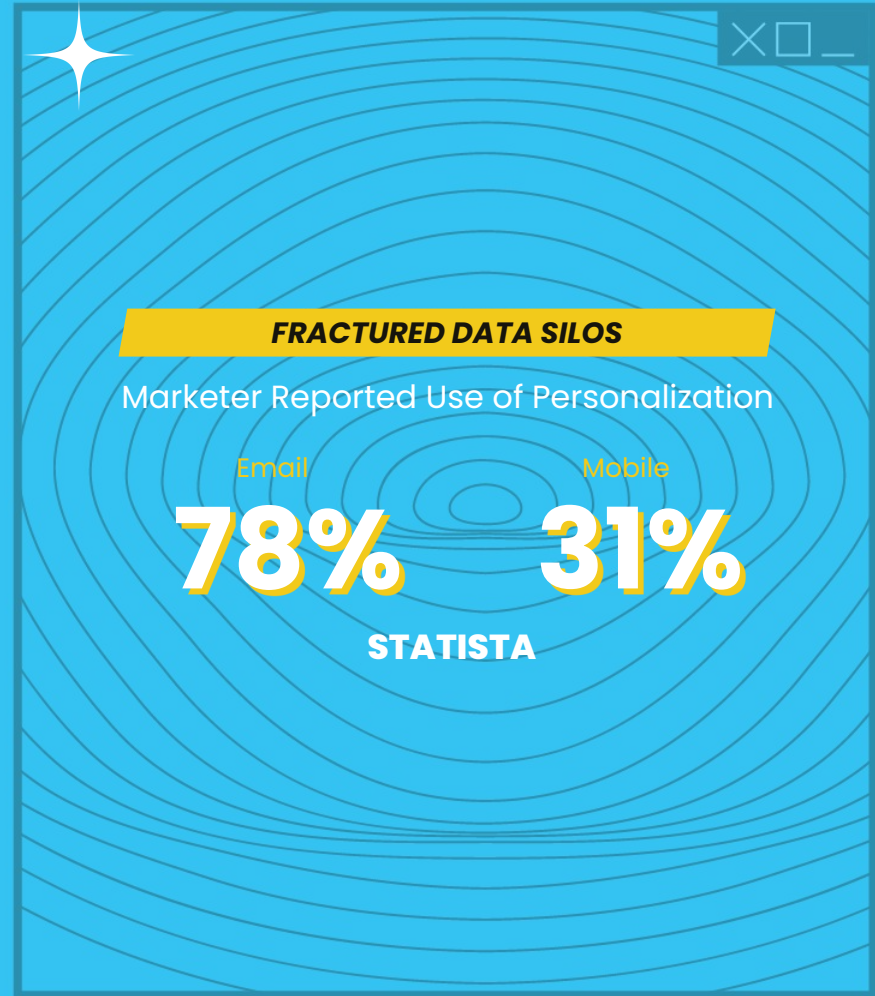
**Goal-Based Journey Design** – Pair Predictive Goals and Journey Assist to define and drive AI powered audience segmentation & journey design based on desired outcomes



## 2. Modernize Architecture

Cloud Native + API First = AI Ready

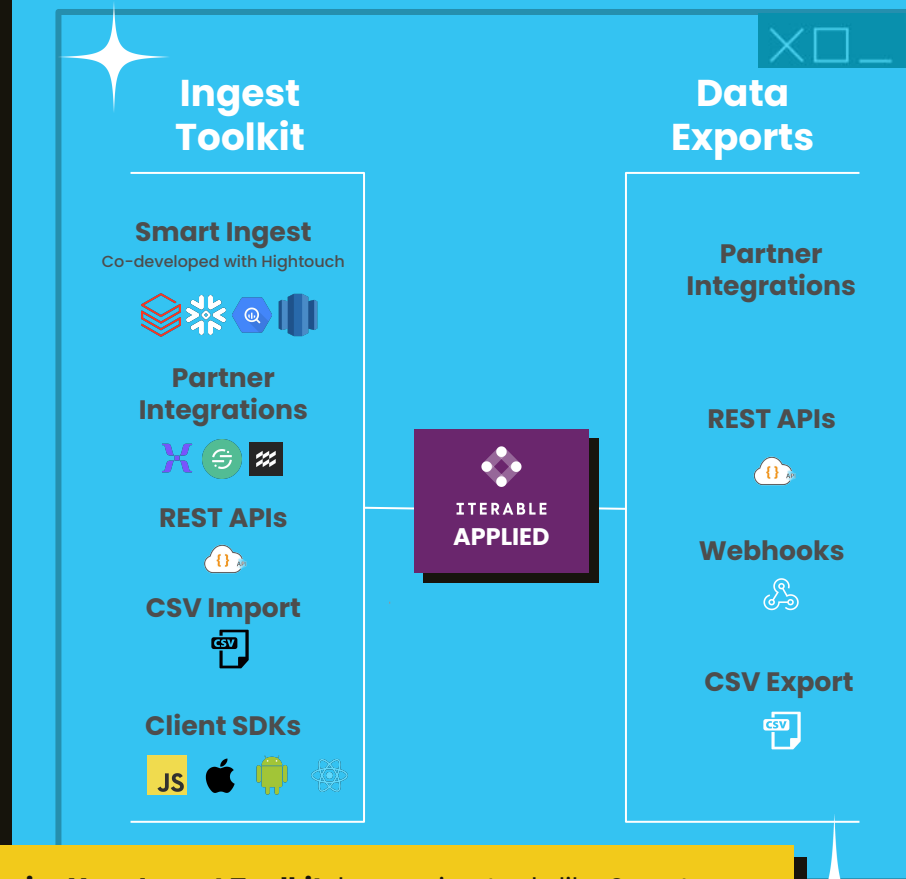
- **Define Source of Truth**  
Anchor your stack for consistency and ease of access
- **Vertically Integrate**  
Assure ecosystem friendly ingestion, integration, and activation
- **Real-Time Ready**  
Architect for instantaneous decisioning & responsiveness



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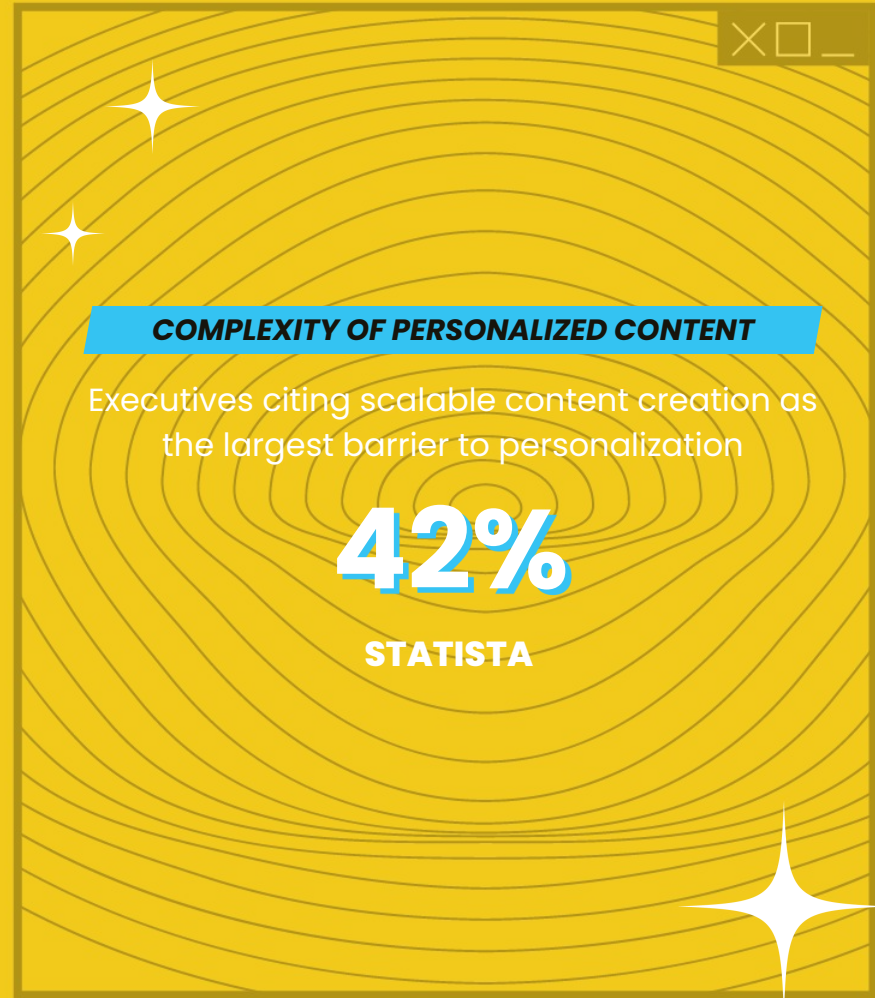
**Maximize Your Ingest Toolkit**, leveraging tools like Smart Ingest to support secure and direct warehouse syncs - removing reliance on technical teams



### 3. Modular Content Design & Decisioning

Set foundation for intelligent design to produce unlimited versioning & testing

- **Asset Management Structure**  
Centralize content management and capture strategy to support modular builds
- **Test AI Powered Decisioning**  
Start small with native tests for generative content, monitoring effectiveness & efficiency
- **Real-Time Content Adaptations**  
Support adaptive strategies that optimize based on user actions & preferences



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**ITERABLE APPLIED**

```
code snippets:
{{firstName}}, here are your tick
{{event.title}}
{{dateFormat event.date format="full"}} at {{event.time}}
{{event.venue}}, {{event.location}}
{{event.ticketInfo}}

VIEW TICKETS

See other upcoming events
happening near you!

{{#catalogCollection "TickPick - Location" as | collection |}}
{{#each collection}}

{{name}}
{{location}}
Tickets starting at ${{priceLow}}
{{/each}}{{/catalogCollection}}

ITERABLE
Here's your recommendations:
{{#catalogCollection "ExampleCollection" as | collection |}}
{{#each collection}}
{{name}}
{{description}}
{{/each}}
{{/catalogCollection}}

Control Panel:
Content Management:
- New Item: [+]
- Live Item: [ ]
- Drafts: [ ]
- Live History: [ ]
- Bulk Actions: [ ]
- Preview: [ ]
- Refresh: [ ]
```

**See other upcoming events happening near you!**

- Mets vs Phillies**  
Citi Field  
Tickets starting at \$35
- Harry Potter and The Cursed Child**  
Lyric Theatre  
Tickets starting at \$26
- New York Philharmonic: Jaap van Zweden - Julia Wolfe unEarth**  
David Geffen Hall  
Tickets starting at \$80

**See other upcoming events happening near you!**

- Kane Country Cougars vs Lake Conroy DookHounds**  
Northwestern Medicine Field  
Tickets starting at \$45
- Grease**  
Drury Lane Theatre Oakbrook Terrace  
Tickets starting at \$65
- Damn Yankees**  
Marriott Theatre  
Tickets starting at \$...

**Maximize Snippets and Catalog** to support dynamic modular content builds

**Copy Assist in Experiments**, applying insights in real time for optimized results



## 4. Build a Culture of AI Literacy

- **Establish AI Council**  
Cross-functional leadership to define and drive vision for AI governance, investment, and use
- **Targeted Upskill Programs**  
Invest time to develop learning paths for AI skill development, shared best practices, and investment in AI tool adoption
- **Realign Talent Strategy**  
Defining future state roles, hiring philosophy, and strategy to acquire & retain top talent



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**Community Network & Upskill Programs** through Iterable Academy, Plaza, Marketing Masters and more

**Future of AI Agent Based Support**, leveraging Iterable as a guided, conversational, and prescriptive AI assistant



# Start Small...

## Crafting the Moment

### **Monday's Challenge**

- Identify One Moment** for AI Workflow Redesign
- 
- 

- Define Success Measures**  
Is this efficiency driven or increased effectiveness?
- 
- 

- Redesign the Workflow**  
Remove manual creation steps for audience, content builds, and optimization
- 
- 

- Test & Document Learnings**  
What worked? What gaps exist? What is needed to scale (process, tools, upskilling)
- 
-



# *WE'D LOVE YOUR FEEDBACK*

Here's how to fill out the session survey:

1. Download/Open the Activate app
2. Toggle to the **Agenda** tab
3. Tap on this session
4. Scroll to **Engagement** and tap **Survey**

## **BONUS**

Complete the survey to earn points you can redeem for prizes at **The Market @ Activate!**



**RECORDING WILL BE  
AVAILABLE ON APRIL 10TH!**



**Thank you!**