Put the life back in lifecycle

MARKETING GUIDE

A guide to giving your customer journey its heartbeat back.



SHIFT PARADIGM

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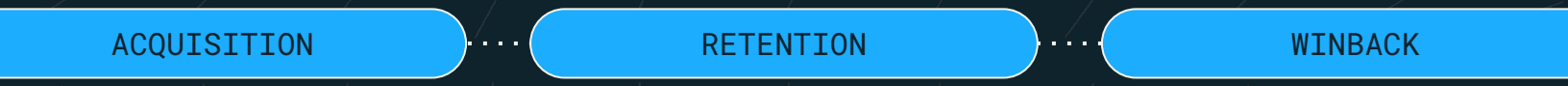
Email | Brand | Product | User Interface Design | User Experience | Customer Experience | Creative Direction | Full Stack Development | Business Strategy | MarTech

EXECUTIVE SUMMARY

Real lifecycles, led by real humans, don't move in straight lines.

Humans pulse. We react. We're emotional. Triggers or events happen quickly that doesn't follow a linear formula, it follows life. But, somewhere along the way, lifecycle stopped meaning something alive.

We're all familiar with the typical diagram or framework. It shows up in strategy presentation slides and the audience nods and thinks *"yes, of course, we need to think about the customer lifecycle journey."*



Sometimes these are interchanged between different types of lifecycles, but the idea is the same. It's the journey of discovery, of making a decision, and then how happy the customer is after making that decision. The framework is clean. It's linear. *But it feels a bit…dead.*

But, this isn't really anyone's fault.

Tools got smarter, dashboards got prettier, and somewhere along the way a lot of us started to mistake our marketing sophistication for aliveness. You can have a beautifully architected program that is functionally flatlining—sending on schedule, segmenting out of habit, crossing off the personalization checkbox—**but not truly connecting.**

What you'll find in **this guide.**

01 Specific ways that lifecycle marketing programs are quietly losing their pulse

02 What the data says is happening across enterprise marketing teams right now

03 What putting the life back into how we reach our customers could actually look like

5 ways your lifecycle program is flatlining.

You're marketing to the person of the past. 01

A lot of marketers went through the practice of cleaning up their data to support the push for personalization—which is nothing new—for years it's been a focus and priority. But, just because you checked off that unified customer data box a while ago, doesn't mean it's still true.

ONLY 26% of marketers are completely satisfied with their data unification

Salesforce, The State of Marketing (10th Edition)

That means roughly **three out of four enterprise marketing teams** are running programs where *pieces of data are quietly assumed.* Segments were built based on a stale data export. Personalization knows about their last purchase, but not about the open support ticket sitting with customer service. Ultimately, there is a lack of trust in the single customer view.

You're talking a lot, but you suck at listening. 02

You've put all your effort into sending out the right messages at the right lifecycle time. You've thought about all the potential friction points as to why they might not engage and you addressed them with a clever campaign that alleviates all of their concerns. But, when they actually need to reach out to you and tell you what they need, you leave them on read.

83% of customers want a two-way dialogue with brands

&

69% marketers admit that they struggle to respond promptly

Salesforce, The State of Marketing (10th Edition)

These marketers may even have a preference center, or send out a survey that their customers fill out, but ultimately are *sitting on valuable data*—not translating customer actions into actions taken for them. Customers who want two-way dialogue are telling you what they want, but marketers aren't doing enough to provide value to them for it.

Your lifecycle program suffers from mixed sophistication. 03

It's a common problem. One team within the organization is forging ahead with an initiative that advances your marketing maturity. Unfortunately, other teams within the same organization are still struggling to just get communications out the door.

ONLY 49% of companies are actually utilizing their MarTech fully

Gartner Marketing Technology Survey (2025)

This means **more than half of marketers struggle** to use their own stack's full capabilities. So you might have genuinely advanced segmentation logic—your company invested in hiring data scientists that are absolutely killing it, but your marketing ops team is under water, lacks platform training, and can barely get an email out the door (and crossing their fingers the email deliverability gods take mercy on them this time).

Content is king, but quantity and quality are mismatched. 04

The instinct for a long time has been to keep pumping out content. The more content, the more chances we'll provide the customer with what they're looking for. Let's add more campaigns. Let's add more channels. The executives love to show how busy the teams have been and show how the 'numbers' are growing. But the numbers don't show the *actual health* of the experience.

57% of B2B marketers claim creating the right content is their top challenge

eMarketer

The real bottleneck never has been about enough output. The real problem is the *fragmentation* between teams, between systems, and between what was promised to the customer in one channel and delivered in the next—resulting in content that doesn't listen to the customer or resonate with their needs at the moment they need it.

You're using AI, but not in the way that could actually drive results.

05

Most of us are using AI, but very few of us have actually made the leap to agentic.

75% of marketers have adopted AI

YET

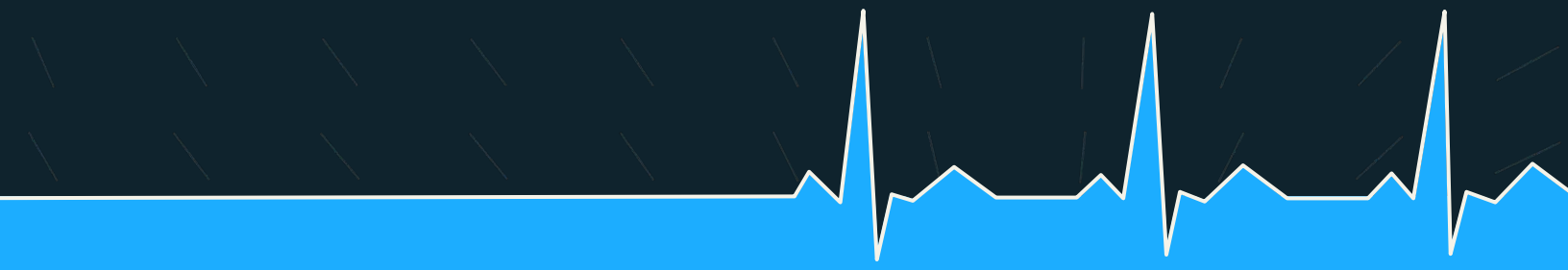
84% still confess to running generic campaigns

&

69% struggle to respond to customers promptly

Salesforce, The State of Marketing (10th Edition)

The beauty is that agentic AI enablement directs your marketing system to read a customer signal (e.g., a churn risk, a renewal window, a stalled onboarding) and respond to it directly. Everyone else is just using AI as a faster way to write the same email they were going to send based off of their campaign calendar anyway. This does not drive revenue and does not fix your lifecycle marketing problems.



So, where do you start?

If lifecycle is going to mean something again, let's *really think* about what actually keeps something alive.

Not a rigid linear framework to roll out—just a checkup to see **what might be missing** from your own program.

Where is your lifecycle program actually losing its pulse?

RUN YOUR PULSE CHECK

- [ ] Pick the campaign that is the closest to a triggered moment and time how long it actually takes from the event happening to a message going out. If the gap is longer than a few minutes, there is an opportunity to **find out why and connect your systems.**
- [ ] Before buying a new tool, check whether an **existing one is already doing the job**—unused. It happens more often than anyone likes to admit.
- [ ] Pick one customer and try to see if you can **pull a report** that shows everything you sent them in the last 60 days. If it means pinging three different teams and stitching together manual exports from different tools, it's a problem.
- [ ] Focus on your most under-resourced lifecycle stage—usually winback or retention—and give it the same data access and attention that your most focused stage already has and **see what changes.**
- [ ] Start with small use cases to **create real-time email automation responses.** One inbox, one trigger, one signal, rather than waiting for a full rebuild to 'do AI'.

How to give your lifecycle it's life back.

A heartbeat that responds, not just repeats

CUSTOMER BEHAVIOR
PRESCRIPTIVE
TRIGGER-BASED
EMAIL

A heartbeat isn't a metronome. It's not a consistent steady beat that keeps you on pace. It reacts. It quickens when something happens. It skips a beat when there is fear.

WHAT TO CHANGE

A lifecycle program with a real heartbeat sends a message because a cart was abandoned, a support ticket went unresolved, a purchase was made. Not because it's 9am on a Tuesday.

WHY IT MATTERS

Sending true behavior-based triggered messages will *meet them where they're at* and hopefully get their blood pumping as they pull the trigger and make that purchase.

It doesn't help if the richest data only lives in ecommerce while your support or sales teams are working with something much thinner.

WHAT TO CHANGE

Each area of the lifecycle—each limb—needs to be aware of what the other is doing, or else you end up in an uncoordinated mess.

WHY IT MATTERS

The parts of the business that are furthest from the source are usually the ones that go numb first. For enterprise brands, that's typically retention and winback while acquisition gets the most attention—overlooking the fact that moving further down the funnel yields richer data and stronger ROI.

Circulation keeps the data alive

ALIGNMENT
DATA
SINGLE SOURCE OF TRUTH
GOLDEN RECORD
ROI
CHURN REDUCTION

A pulse the other person can actually feel

BRAND | CX | PERSONALIZATION | ANALYSIS

Internally, the pulse tends to get measured in a dashboard that reflects past trends. But, when the company performance shows a steady decline, you're left wondering why the dashboard failed to predict a flatlining customer relationship.

WHAT TO CHANGE

The pulse that actually matters is the one the customer *feels* as they interact with your brand. It requires a strategy to reconcile your customer journey analytics.

WHY IT MATTERS

A brand can look alive within its own reporting, but *can feel completely dead* to the customer on the other end of an unanswered email, or generic website experience.

Reflexes, not just intentions

DATA | AUTOMATION | PRESCRIPTIVE ACTION | FEEDBACK LOOP

The reason why this ideal state of lifecycle marketing stays in an aspirational state is because we're still treating it in the way we've always treated marketing. Everything is still routing through a slow, conscious, linear decision process. A person builds a campaign, a committee approves a segment, content is manually built.

WHAT TO CHANGE

Life doesn't wait for an approval email—it reacts. Getting a program that actually behaves and reacts is less about ambition or big ideas. It's about the system and how the plumbing is all connected. Connected data, connected strategy, connected feedback loops, & optimizations.

WHY IT MATTERS

This positions the organization to act on these key customer moments *immediately*.

You've found the leaks, but still face the same problem that got you there in the first place: a lack of resources, experience, and time.

The good news: this is where SHIFT can help.

We audit and build the work—mapping where your lifecycle is currently losing its pulse, reconnecting the data that's supposed to be unified, but isn't, and building the trigger-based, two-way, agentic-ready foundation that makes 'lifecycle' a true statement again.

None of this is about doing more. Most enterprise lifecycle programs don't need another channel, another campaign calendar, or another 100-page slide deck. They need the specific, unglamorous work of connecting what's already there, *and* the discipline to let that connection actually change what gets sent, to whom, and when.

We partner with enterprise marketing teams on exactly this: lifecycle & CRM marketing strategy, email, and CRM integrations. We help build the connective tissue that most transformation projects skip past on the way to something prettier and flashier. But, we know the truth. Looks fade. It's what's inside that counts.

A pulse can quicken from excitement the same way it can quicken from anxiety.

We can help you remove the friction, build a system that connects the customer experience, and forge relationships that last the test of time, and bring your lifecycle marketing back to life.

SHIFT PARADIGM

BRING YOUR LIFECYCLE BACK TO LIFE