



10 min read on “Where to begin” with

AI in Lifecycle Marketing

Contributors

This piece was created based on a discussion among lifecycle marketing leaders in San Francisco in June 2025.

They shared where each is using AI today and thoughts on where this space is headed.



Megan Walsh

Global Head of
Lifecycle Marketing

Canva



Winchell Chang

Director of
Lifecycle Marketing

 **Vanta**



Jeff Lee

Technical Lead
Lifecycle Marketing

Calm



Priy Ranjan

Co-founder

 **sortment**



Aboli G

Director of
Lifecycle Marketing

credible



Christina Medina

Associate Director
Retention

 **POSHMARK**



Jeanie Mai

Senior Manager
Lifecycle Marketing

credible



Ishan Rakshit

Co-founder

 **sortment**

Content
creation is the
#1 use-case for
AI in lifecycle
marketing
today

Top use cases



Writing copy from
campaign briefs



Writing or editing
HTML or Liquid code



Repurposing copy
across channels



Creating campaign
documentation

The best
model
depends on
the use case

Top AI Models (Text Generation)

Rank (UB)	Company	Model
1		gemini-2.5-pro-preview-06-05
2		gemini-2.5-pro-preview-05-06
2		o3-2025-04-16
4		chatgpt-4o-latest-20250326
4		gpt-4.5-preview-2025-02-27
5		gemini-2.5-flash-preview-05-20

Source: LMArena

But the problem with AI today?

- It makes **mistakes**
- **Doesn't** have full context
- Obviously, it **can't** be held accountable

AI still needs
“human(s) in
the loop” to
scale

Human in
the loop

vs

Fully
autonomous



AI vehicles (#)

4 Mn

1,500

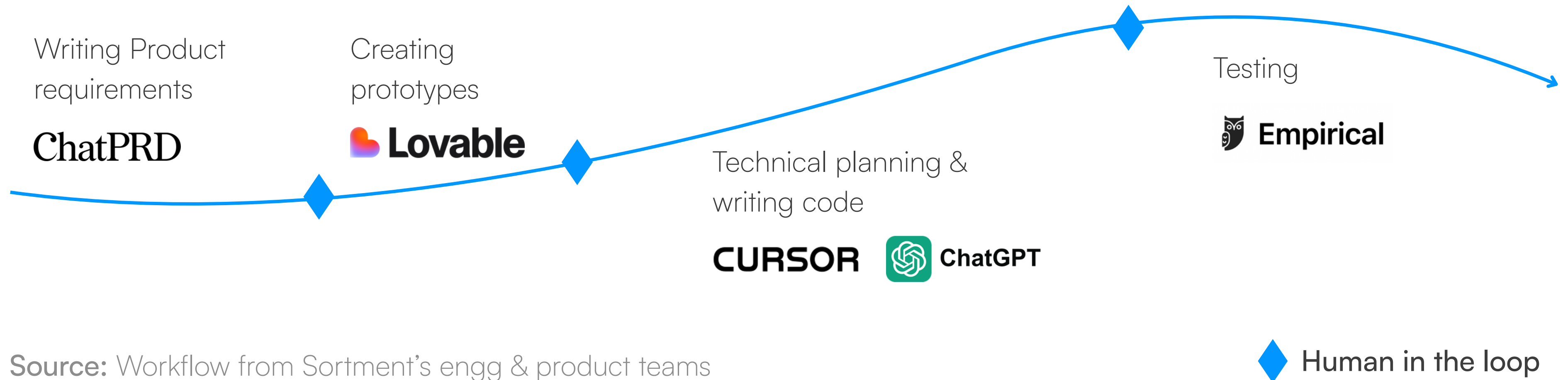
AI miles (#)

3.6 Bn

33 Mn

Software teams are using AI to produce 30% more output

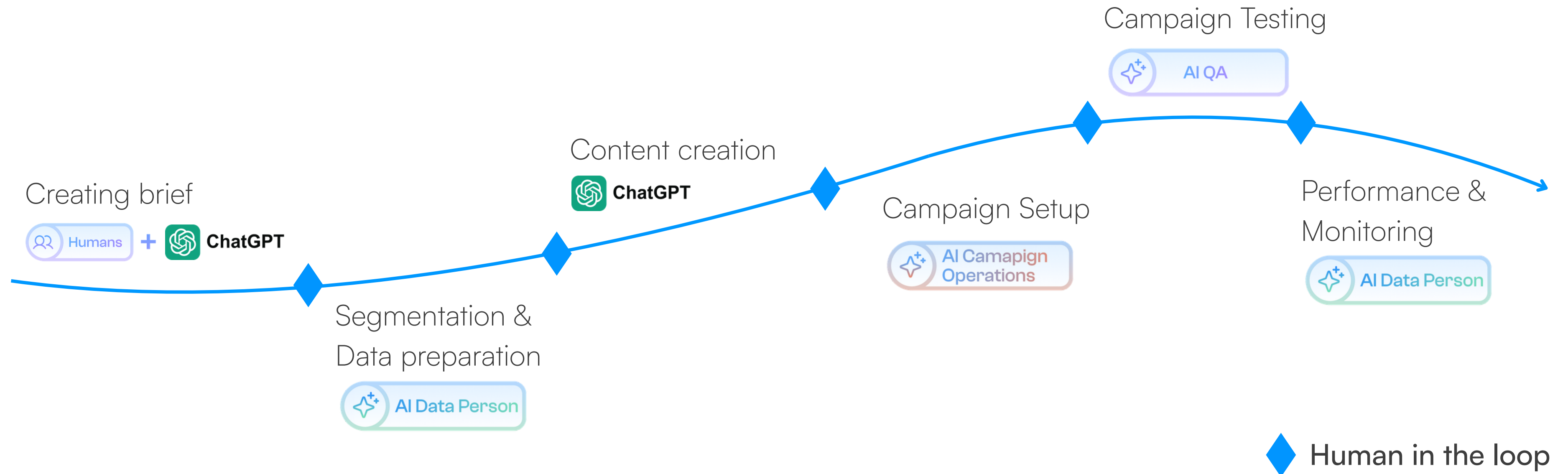
Als do the work, Humans provide context and review AI's work



Source: Workflow from Sortment's engg & product teams

Lifecycle marketing could see similar transformation in the coming days

Marketers will move from pushing buttons to setting direction



Impact:
Enabling 10x
ideas that
actually get
executed

AI impacts this

of ideas tried

x

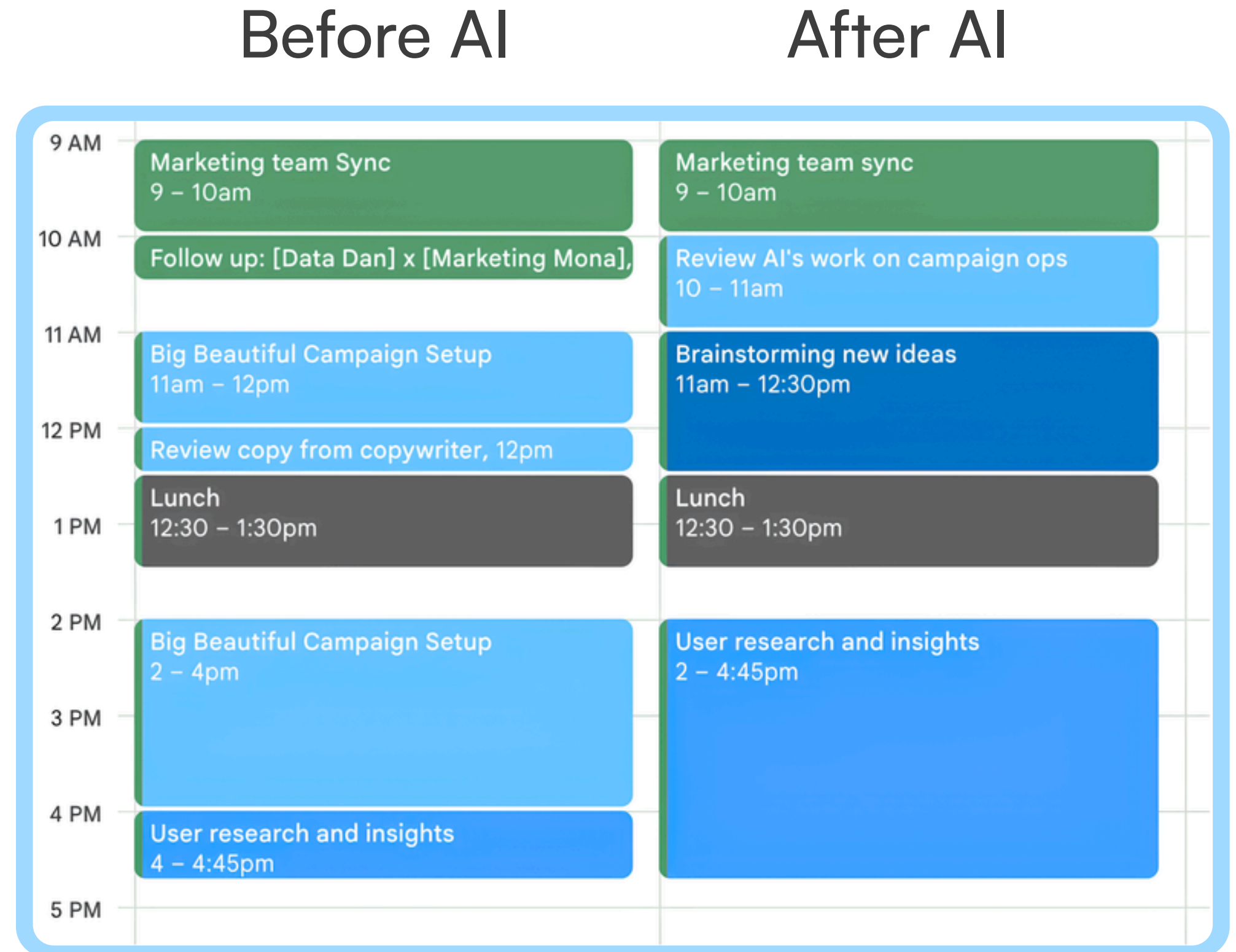
% of ideas that work

=

of winning ideas

Source: State of Marketing 2025 (Chiefmartec)

Impact on the “day in the life” of a marketer



Reference: LinkedIn post by Yamini Rangan (CEO @ Hubspot)

What agents do leaders want?

The order lifecycle leaders would follow to staff their AI team

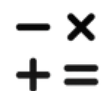
Already in
use



AI Copywriter

Existing AI tools play this role

1



AI Data Person

Prep lists and user attributes for campaigns, run analyses, prepare reports, monitor ongoing campaigns' performance and deliverability

2



AI Campaign Operator

Setup campaigns and journeys, QA them

3



AI Strategy Assistant

Generate new hypotheses based on user + business + past campaigns context (most difficult to build trust here)

Source: Conversations with 50+ Lifecycle Leaders in Apr-June 2025

Lifecycle AI tooling landscape

What use cases require a separate tool VS ChatGPT or existing ESPs?

Copy



Write copy in your brand voice; model companies (openAI, claude) are able to do the job and need for specific tooling isn't felt by most companies.

Email builder



Most tools here are built for developers. Kombai is unique as it takes Figma as an input. No tools yet that create output on drag and drop builders.

AI Decisioning NEW



New category: They are using predictive AI to find the right message / offer, for the right person at the right time automatically.

Agentic AI NEW



New category: AI completes a more complex piece of work. Sortment covers data engineering use-cases today

ESP AI



ESPs have provided predictive AI capabilities: sent-time, frequency, channel optimization for a while now. Recently added content creation

AI Workflows



These tools are Zapier for AI (inclu. Zapier). They help create custom workflows using LLMs. Use cases identification and implementation needs to be done by companies themselves.

Making most of AI: Prompt engineering

Best practices for copywriting use-cases

- 1 Using reasoning models to deploy more thinking
- 2 Prompt the AI to have rigor, attention to detail
- 3 AI works better when you give it examples
- 4 Setting constraints prevents AI from rambling
- 5 Use web search to enable smarter answers
- 6 AI is your intern: it performs best when given context



Get Prompt Template

Built using these prompt engineering
techniques for writing lifecycle
marketing copy

About Us

*sortment

Sortment is building AI agents for lifecycle marketing.

The vision is to free-up time from operational activities, letting marketers spend more time on generating new hypotheses.

Their first agent is an AI data engineer which can help marketers with all their data work.



Priy Ranjan
CEO & Co-founder,
Sortment



Scan QR code
to **learn more**
about Sortment



Lifecycle Luminaries

Lifecycle luminaries is a community of AI-forward lifecycle leaders.

It is fostering conversations on best practices, change management, and impact of AI through a mix of online and offline platforms.



Aboli
Founder, Lifecycle Luminaries
Director, Credible



Scan QR code to
join our **Slack**
community

***sortment**

X



Lifecycle Luminaries