

A COLLECTION OF BRAND THOUGHTS, IDEAS AND STRATEGY
INTERVENTIONS FROM MARKETERS AROUND THE WORLD

III EDITION

State *of the* Brand ²⁰²⁶



The New Marketing OS:

Human-led.
AI-powered.
System-built.

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Rewiring Marketing's Operating System

There is a quiet but irreversible shift underway in marketing.

For decades, growth was engineered through campaigns, managed through channels, and measured in bursts of activity. Strategy lived in presentations, creativity lived in moments, and operations lived somewhere else entirely. The model worked when markets moved slowly, media was scarce, and customer journeys were relatively linear.

That world no longer exists.

Today, intelligence is automated, distribution is infinite, attention is fragmented, and customer expectations are shaped by the best system they have ever encountered, not the best message they have recently seen. Decisions are increasingly influenced by algorithms before they are influenced by advertising. Experiences are judged as a continuous flow, not isolated touchpoints. Performance without brand erodes margin, and brand without performance struggles for oxygen.

In this environment, marketing cannot behave like a department. It must behave like an operating system.

An operating system aligns inputs and outputs. It determines how signals move, how decisions are made, how learning accumulates, and how adaptation happens under pressure. It connects creativity to data, promise to delivery, and ambition to accountability. Most importantly, it compounds.

The organizations that are outperforming their markets today are not simply better storytellers or sharper optimizers. They are better integrators. They design marketing as an interconnected set of capabilities where brand building, demand capture, experience delivery, and intelligence loops reinforce one another continuously.

This edition of State of the Brand explores that transformation.

Across these pages, global practitioners examine what it means to build marketing systems that are human in judgment, intelligent in execution, and resilient in volatility. They unpack how AI is reshaping discovery and

decision-making while elevating the importance of human stewardship. They show why experience must be engineered as infrastructure rather than decorated as an interface. They reframe the relationship between brand and performance from a budget debate into a growth engine. And they explore how organizations can design adaptive structures that learn faster than the markets around them. What emerges is a common realization.

The advantage of the future will not belong to those who communicate the loudest. It will belong to those who build systems that work the best. You will find frameworks that make abstract ideas operational. You will encounter examples that move beyond theory into implementation. And you will see a recurring belief that marketing's role in the enterprise is expanding from persuasion to orchestration. This is not a cosmetic evolution. It is structural.

To rewire marketing's operating system requires new governance, new collaboration models, new fluency with technology, and renewed respect for human insight. It demands that we design for memory, trust, speed, and adaptability simultaneously. It asks leaders to trade episodic wins for compounding progress.

It is harder work. It is also the only work that will endure. I am deeply grateful to the contributors in this edition who have brought rigor, generosity, and candor to this conversation. Their perspectives represent multiple industries, cultures, and growth contexts, yet they converge on the same truth: marketing is becoming the connective tissue of the modern organization.

If we design it well, it becomes the engine of sustainable growth.

Welcome to State of the Brand 2026.

Let's rewire the system.

Anand Sankara Narayanan
Curator,
State of the Brand 2026

Meet the minds

Contributors

Dr. G. Clotaire Rapaille

USA

Cultural Anthropologist, Author, Keynote Speaker,
CEO and Founder at Archetype Discoveries Worldwide



Dr. Clotaire Rapaille is a globally recognized marketing strategist and cultural anthropologist known for discovering “Culture Codes” that reveal the unconscious drivers of consumer behavior. Drawing from psychology, psychoanalysis, and anthropology, and inspired by thinkers such as Carl Jung and Claude Lévi-Strauss, he developed a pioneering methodology based on the “Logic of Emotion.”

He is the originator of Reptilian Marketing, helping brands uncover instinctive motivations and unspoken needs. Over 35 years, Dr. Rapaille has advised leading international corporations worldwide, offering a unique cross-cultural perspective shaped by extensive global research and experience across the Americas, Europe, the Middle East, and Asia.



Anand Sankara Narayan

UAE

CMO, Finance House Group

Anand is a strategy-first brand builder with over 17 years of cross-industry experience, operating at the intersection of business growth, human insight, and culture-led creativity. He is a keynote speaker at leading marketing forums, sits on the jury screening council for the MMA Smarties X Global and North America awards, and is a Forbes Communications Council member, writing on marketing and customer centricity for Forbes.com.



Mike Rich

UAE

CEO, Rich Marketing

Mike Rich is a seasoned marketing leader who turns marketing into a profit engine. Former Group CMO of Aramex and The ENTERTAINER, he built global brands across 60 countries. He now leads RICH, supporting businesses with commercial-first marketing, fractional CMO leadership, recruitment, AI capabilities and scalable growth solutions.



Nitin Khanna

India

Vice President - Marketing, ACKO General Insurance

Nitin Khanna is a senior marketing leader working at the intersection of brand, growth, and technology. He has spent over a decade and a half building and scaling digital-first businesses, with a focus on designing growth systems that integrate brand strategy, performance marketing, customer experience, and AI into compounding growth engines.



Pratibha Singh

India

DGM - Brand & Marketing Dainik Bhaskar Group

Pratibha Singh is a senior brand and marketing strategist with over 20 years of experience. She currently serves as DGM – Brand & Marketing at India's largest newspaper group, Dainik Bhaskar Group. She specializes in brand-led growth, large-scale integrated campaigns, and building high-performing teams, with an award-winning record of driving brand transformation at scale.



Rah Mahtani

USA

Head of Marketing & Commercial Strategy, Alibaba.com

Rah Mahtani is Head of Marketing for Alibaba.com in the United States. He focuses on helping small businesses build sustainable growth through smarter sourcing, brand clarity, and practical use of emerging technologies. Rah regularly writes and speaks about the evolving intersection of marketing, AI, and global commerce.



Sandeep Nair

India

Co-Founder, David & Who. Ex-P&G and Swiggy brand lead. LinkedIn Top Voice.

Sandeep simplifies brand marketing for companies under \$10M ARR, driving sustainable revenue growth. He has developed strategies for brand portfolios reaching \$38M revenue. Expertise: positioning, consumer behaviour, communication strategy. Interests: behavioural economics, philosophy, AI, geopolitics, writing.



Before Marketing Becomes a System, It Becomes an Imprint

Decoding the Unconscious Operating System That Governs Brands, Markets, and Human Choice

by **Dr. G. Clotaire Rapaille** | Cultural Anthropologist, Author, Keynote Speaker,
CEO and Founder at Archetype Discoveries Worldwide, USA

You never get a second chance to create a first experience.

This is not a slogan, nor a piece of marketing wisdom designed to sound profound. It is a fundamental law of human behavior. Long before people rationalize, compare, or evaluate, they experience. And the nature of that first experience creates an imprint that silently governs all future perception.

Modern marketing, however, rarely starts here.

Brands devote extraordinary energy to positioning statements, pricing models, visual identity systems, and campaign narratives. These efforts are not unimportant, but they are secondary. They occur after something far more decisive has already taken place: the brand has been encoded in the human brain.

Human beings do not remember brands the way they remember facts. They remember brands the way they remember emotional states - safety, danger, comfort, belonging. Brands live not in the cortex, where logic resides, but in deeper, older structures of the brain that govern survival and instinct.

To understand this, we must step away from marketing language and return to anthropology.

The Origin of Brand Meaning Happens Before Choice

Consider coffee in America.

The first meaningful encounter with coffee does not occur when a person orders their first cup. It happens much earlier, often around the age of two. At that age, the child does not drink coffee, does not understand it as a product, and does not recognize its functional purpose.

What the child experiences is aroma. That aroma is not interpreted intellectually. It is absorbed emotionally and unconsciously. It signals a set of associations: I am home. My mother is nearby. Breakfast is being prepared. I am safe. I am cared for.

This sensory experience becomes the reference system for coffee for the rest of that

person's life. Long before branding, packaging, or advertising enter the picture, coffee has already been coded as a feeling.

This is why Folgers became the number one coffee brand in the United States for more than a decade. Its success was not primarily driven by superior design, sharper positioning, or competitive pricing. Folgers owned the imprint of home and safety. Once that imprint was established, every subsequent interaction reinforced it.

This is how brands endure. They do not persuade. They imprint.

When Sensory Experience Outperforms Symbolic Prestige

This principle applies far beyond consumer goods.

While working with the president of the Ritz-Carlton, I suggested something that initially seemed counterintuitive: placing Mr. Coffee machines in the hotel lobby. The objection was immediate and logical. "Not all guests drink coffee."

That is correct. But all guests smell it.

We tested the idea empirically. One lobby without aroma. One lobby with coffee aroma. Guests were then asked a simple set of questions about their experience.

The results were unambiguous. Guests who passed through the lobby with aroma reported higher satisfaction with the hotel experience overall. Importantly, this uplift had nothing to do with conscious awareness. Guests were not necessarily able to articulate why they felt better. They simply did.

The cost of introducing aroma was minimal compared to investments in visual art or architectural signaling. Yet its impact was greater.

Why?

Because paintings speak to the cortex. Aroma speaks to the reptilian brain. And the reptilian brain always wins.

How Brands Are Quietly Destroyed

If brands are built through imprints, they are destroyed the same way.

Most brand failures are not dramatic. They do not require scandal, incompetence, or neglect. In fact, many brands are destroyed "naturally," through well-intentioned decisions made by intelligent people who misunderstand how brands live in the human mind.

Engineers, for example, are exceptionally good at solving functional problems. They are rarely good at marketing. Not because they lack intelligence, but because they operate almost entirely at the level of logic. Brands, however, do not reside there. This is how we ended up with concepts like the "Big Mini" or the "Small Limousine."

Linguistically clever. Functionally rational. Neurologically incoherent. To the human brain, these are contradictions. A brand cannot be two opposing things at once without collapsing its meaning.

The same misunderstanding appears when brands are treated as interchangeable categories rather than symbolic systems. When Rolls-Royce is perceived internally as "just another BMW," stripped of its flying lady, its ritual, and its mythology, something fundamental is lost. Function may remain, but the soul disappears.

There is, however, an even faster way to kill a brand.

It is called rebranding.

History offers no shortage of examples where brands attempted to overwrite their unconscious code in pursuit of relevance.

Consider Budweiser's attempt to appeal to audiences fundamentally misaligned with its imprint. Budweiser's core reference system was not urban progressivism; it was grounded in the identity of the American Midwest - the pickup truck, the six-pack, the rifle mounted in the rear window. This was not a demographic stereotype. It was a deeply rooted emotional identity.

When the brand violated that imprint, logic was powerless. The reptilian brain reacted first. And the reptilian brain always wins.

The same question applies elsewhere. Is an electric Harley-Davidson - silent, restrained, polite, still a Harley? Harley is not transportation. It is rebellion, noise, vibration, and raw presence. Remove the sound, and you remove the signal that activates the brand's emotional code.

Contrast this with Jeep.

The Jeep Wrangler has evolved. It has four doors. It incorporates modern technology. Yet it remains unmistakably a Jeep. Why? Because its fundamental

elements, the ones that speak to the unconscious, have been preserved. With a Jeep, you do not need a road. You make the road. With no doors and no roof, wind against your face, you are not driving a vehicle; you are reenacting the myth of the pioneer on horseback. This is what brand strength truly is.

You can improve a brand. You can modernize it. You can extend it. But you must respect its code. That code is not a tagline or a positioning statement. It is the emotional truth that first imprinted itself in the human mind.

When a brand communicates that deep emotion consistently, it resonates far beyond reason. It does not need to persuade. It is simply recognized.

And once that recognition is broken, no amount of strategy, media spend, or system optimization can restore it.

This is How Modern Marketing Misses the Point

Most brands believe their job is to communicate meaning. In reality, their job is to activate memory.

Human beings do not decide first and then feel. They feel first and then justify. Rational explanations are constructed after the emotional conclusion has already been reached.

This is why so many well-designed brands fail. They communicate beautifully but imprint poorly. They speak eloquently to conscious reasoning while neglecting the unconscious reference systems that govern trust and attachment.

For marketers, this requires a fundamental shift in thinking.

The central questions are no longer:

What is our positioning?

What is our value proposition?

The more important questions are:

What is the first sensory or emotional imprint our brand creates?

What unconscious reference system does it activate?

Does the experience signal safety or uncertainty?

Does it feel like home or like a transaction?

Does it calm the reptilian brain or trigger vigilance?

Where Imprints Are Actually Formed Today

In an era increasingly mediated by AI, automation, and compressed decision journeys, imprints matter more than ever. Machines may facilitate discovery, but human choice is still governed by unconscious evaluation.

Crucially, imprints are not formed through slogans, decks, or dashboards. They are formed through sensory and experiential signals: sound, rhythm, friction, tone, texture, and absence.

For modern organizations, this means paying attention to moments that are often dismissed as operational or peripheral:

The first five seconds of onboarding

The first error message a user encounters

The tone of the first support interaction

The moment of first delivery

The confirmation of first payment

The silence when something goes wrong

These moments do not appear on brand strategy slides, yet they decide whether the brain concludes, “I am safe here” or “I should leave.”

From Imprint to Enduring Advantage

As marketing becomes more system-driven and increasingly mediated by algorithms, the temptation is to focus on optimization, scale, and efficiency. These are important, but they are not sufficient.

Algorithms amplify what already exists. They do not create meaning. They cannot compensate for a weak or incoherent imprint.

The brands that will endure are those that understand a simple truth: before marketing becomes a system, it becomes an imprint. And once an imprint is established, every system either reinforces it or erodes it.

The future belongs not to brands that shout louder or optimize faster, but to those that understand how human beings truly remember, trust, and choose.

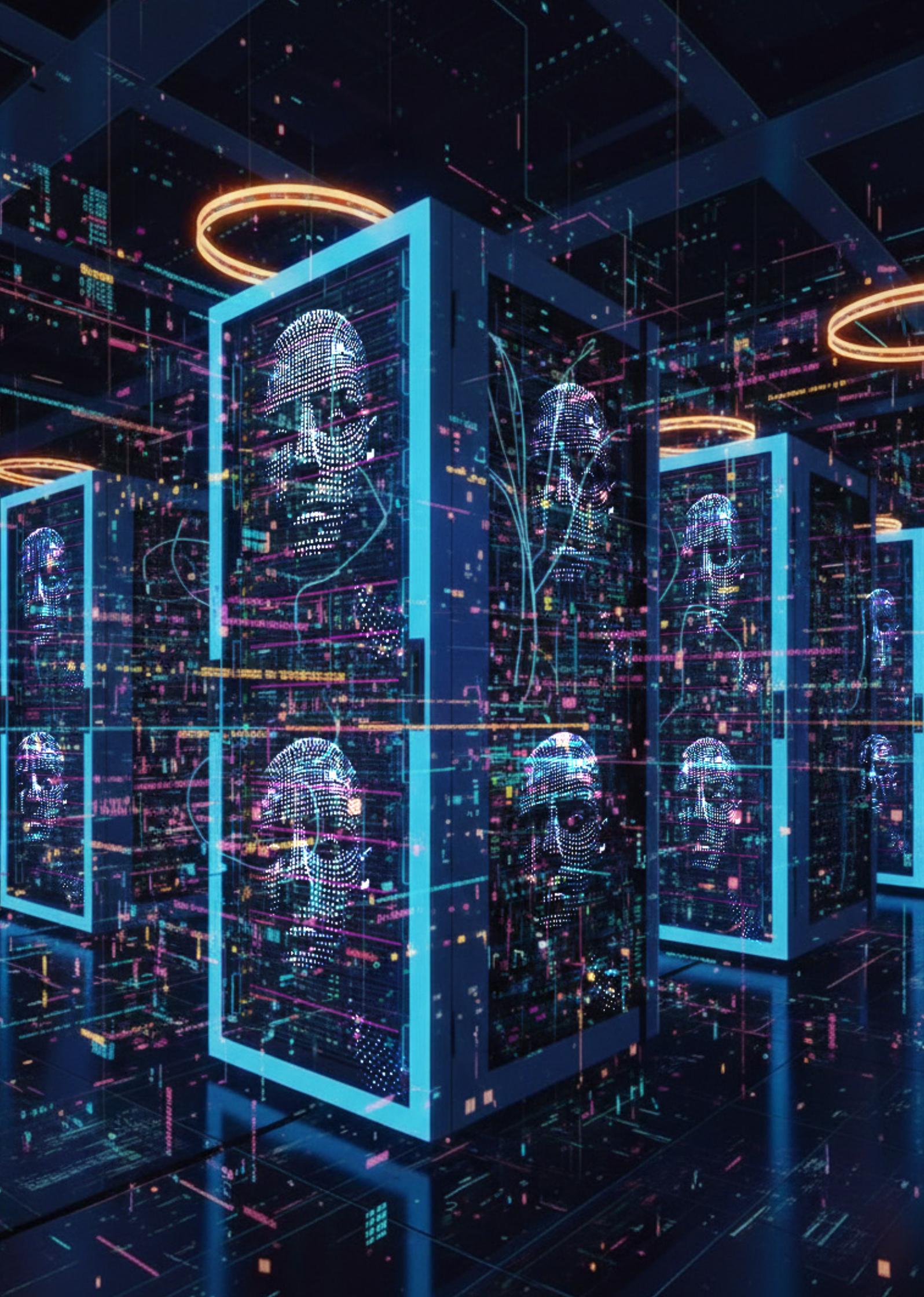
Because in the end, the reptilian brain decides. And it always has.



Emotions are the keys to learning, the keys to imprinting. The stronger the emotion, the more clearly the experience is learned.

- Dr. Clotaire Rapaille -





Human-in-the-Loop Decision Systems: When Should Humans Override the Machine?

Designing governance for AI-driven marketing decisions: pricing, targeting, personalization & ethics

Mike Rich | CEO, Rich Marketing, UAE

The New Marketing Reality: Algorithms Are Already in Charge

Most marketing leaders don't wake up and say, "Let's hand control to machines." But it's already happened.

Pricing engines adjust in real time. Media platforms decide who sees what. Recommendation systems shape customer journeys. AI models segment audiences, optimise spend, personalise content, and predict churn, often faster than any human team could.

The shift didn't come with a big announcement. It crept in quietly through platforms, tools, dashboards, and automation layers. Now, in many organisations, the most important marketing decisions are no longer made by people, they're made by systems.

And that raises a more uncomfortable question: When should humans step in and override the machine?

Not to slow it down. Not to block innovation. But to protect the business, the brand, the customer, and the ethics that algorithms don't understand, because speed without judgment isn't intelligence. It's just automation

The Illusion of Objectivity

One of the biggest myths around AI is neutrality. Algorithms feel objective because they're mathematical. But they are trained on data and data is historical, biased, incomplete, and human. If the input is flawed, the output scales the flaw, which is exactly why

human judgment still matters.

Human-in-the-Loop: Not Control but governance

Human-in-the-loop systems aren't about humans doing the work, they're about humans governing the work.

The model is simple in theory:

- AI handles scale, speed, and complexity
- Humans handle meaning, judgment, and responsibility

In practice, this means designing decision systems where:

- Machines execute
- Humans define boundaries
- Humans intervene when thresholds are crossed

It's not man versus machine, it's machine with oversight.

Where Human Override Matters Most in Marketing

Not every AI decision needs human intervention. But some categories absolutely do.

1. Pricing Systems

Dynamic pricing engines can optimise for margin, demand, and volume, but they can also:

- Create price discrimination
- Penalise loyal customers
- Erode trust
- Trigger regulatory risk

Human override rule: Humans define ethical pricing boundaries. Machines optimise within them.

2. Targeting and Segmentation

AI can identify patterns humans can't. But it can also:

- Exclude marginalised communities
- Reinforce socio-economic divides
- Create algorithmic bias

Human override rule: Humans audit who is being excluded, not just who is being targeted.

3. Personalisation Systems

Personalisation feels helpful, until it becomes intrusive, manipulative, or psychologically exploitative.

Examples:

- Addiction-driven content loops
- Emotional vulnerability targeting
- Behavioural nudging without transparency

Human override rule: Humans define psychological and ethical boundaries. Machines personalise within them. Personalisation should create relevance, not dependency.

4. Brand Safety and Reputation

AI can optimise placements and reach, but it doesn't understand meaning. It doesn't always know:

- Context
- Cultural nuance
- Sensitivity
- Symbolism

Human override rule: Humans protect brand meaning. Machines optimise distribution. This is why fully automated media buying without governance keeps causing brand disasters.

The Real Risk: Invisible Decisions

The biggest danger isn't bad decisions. It's invisible decisions.

When AI systems operate as black boxes:

- No one knows why decisions are made
- No one owns accountability
- No one can explain outcomes
- No one can intervene intelligently

This creates a new leadership risk: **Decisions without responsibility.**

And businesses don't fail because of bad data, they fail because of unowned decisions.

Designing Human-in-the-Loop

Governance

This isn't about building more dashboards, it's about building decision architecture.

Governance Model

A practical model looks like this:

Machine Zone - Fully automated decisions with low ethical or reputational risk

Guardrail Zone - AI operates within defined human rules and thresholds

Override Zone - Human approval required before execution

Decision Thresholds

Define clear triggers for human intervention:

- Revenue impact thresholds
- Reputation risk indicators
- Ethical risk signals
- Regulatory exposure
- Customer trust metrics

If thresholds are crossed, automation pauses, humans step in.

Accountability Design

Every AI system must have:

- A human owner
- A governance framework
- An escalation path
- A kill switch

If no one owns it, it shouldn't exist.

A New Marketing Leadership Skillset

Modern marketing leadership now requires:

- Data literacy
- Ethical literacy
- Systems thinking
- Governance design
- AI fluency

The CMO of the future isn't a creative

The future
of marketing
isn't automation,
it's orchestration.

director and they're not a technologist either. They're a decision architect.

AI will make better decisions than humans, but it will never make wiser ones.

Wisdom requires:

- Context
- Values
- Judgment
- Responsibility
- Moral reasoning

Machines don't have any of those, which means the future of marketing isn't automation, It's orchestration.

Humans setting direction, machines delivering scale.

Don't Ask What AI Can Do, Ask What It Should Do

The wrong question is:

"How much can we automate?"

The right question is:

"Where should we never automate?"

Because trust, brand, ethics, and meaning don't scale through code, they scale through leadership.

Human-in-the-loop systems aren't a limitation on AI, they're what make AI safe enough to scale.

And the companies that get this right won't just outperform competitors, they'll outlast them!



Content Strategy

Content

Social Media

Ad Platforms

Credibility

SEO

The Growth OS: How Brand and Performance Integrate Into a Compounding Engine

by **Nitin Khanna** | Vice President - Marketing, ACKO General Insurance, India

Most senior marketers will recognize this moment immediately.

Growth looks fine...until it doesn't. Acquisition costs creep upward quarter after quarter. Performance channels still deliver volume, but efficiency quietly erodes. Brand metrics trend positively, yet conversion refuses to follow. Eventually, the uncomfortable question surfaces: *Why is growth getting harder, even as we invest more across the board?*

The problem is rarely effort or talent.
It is architecture.

As we move toward 2026, growth can no longer be driven by isolated campaigns or function-specific excellence. The brands that scale sustainably are those that have moved from campaign thinking to system thinking - building what can be described as a Growth OS, where brand, performance, experience, and increasingly, AI operate as a single compounding engine.

Why Campaign-Led Growth Is Breaking Down

Campaigns persist because they are familiar. They are easy to plan, easy to fund, and easy to measure. They fit neatly into quarters, briefs, and dashboards.

Customers, however, do not experience brands in campaigns. They experience them as an accumulation of signals over time - what they hear, what they see, how easy it is to buy, and what happens after they do.

This disconnect is why campaign-led growth is becoming less effective. It optimizes moments, not relationships.

Decades of IPA effectiveness data analyzed by Les Binet show that brands overly focused on short-term activation may see early gains, but those gains decay quickly. Over time, costs rise and returns flatten.

Binet's insight is not anti-performance. It is pro-balance. Long-term brand building creates memory structures that make short-term activation more efficient.

Campaigns create spikes. Systems create momentum - and momentum is what compounds.

The New Consumer Reality: Consistency Beats Creativity

For years, marketers were rewarded for creativity that stood out. Distinctive campaigns, bold storytelling, and cultural relevance were the primary drivers of brand differentiation.

Today's consumers are asking something more demanding: behavioral consistency.

Modern customers are always-on, across platforms and devices, deeply intolerant of friction and one click away from alternatives. They no longer separate advertising from experience, or brand promise from product reality. To them, everything is the brand.

A powerful campaign followed by a confusing onboarding flow or inconsistent service experience doesn't just disappoint - it actively erodes trust.

This is why experience consistency is becoming as important as, and often more important than, creative consistency. Consumers expect brands to behave the same way everywhere, not just look the same. Creativity earns their attention, but consistency earns belief.

What the Growth OS Actually Changes

Most organizations agree that brand and performance should work together. Very few are designed for it.

The Growth OS reframes growth as a continuous loop, not a funnel with an endpoint.

At its core:

- Brand creates demand by building mental availability and trust
- Performance captures demand at moments of intent
- Experience compounds demand through retention, usage, and advocacy

This aligns closely with Byron Sharp's research on how brands grow. Growth comes from increasing mental and physical availability - being easy to think of and easy to buy - not from persuasion or loyalty mechanics.

When the system works:

- Brand lowers the cost of performance

- Performance data sharpens brand decisions
- Experience turns customers into repeat buyers and advocates

To make the Growth OS practical rather than abstract, it helps to think of it as a set of reinforcing capabilities that operate continuously. At its simplest, the Growth OS is made up of five interconnected layers:

Signal → Convert → Deliver → Adapt → Steward

Signal reflects how the brand shows up in the market - its mental availability, category entry moments, and trust cues.

Convert translates demand into action by capturing intent, clarifying value, and removing friction.

Deliver is where promised value is realized through onboarding, reliability, and service recovery.

Adapt ensures the system learns continuously through experimentation, message-market fit signals, and experience diagnostics.

Steward provides long-term discipline by governing brand principles, pricing integrity, AI behavior, and risk trade-offs.

Growth compounds when these layers reinforce one another. When they are owned separately, efficiency decays - even if individual teams perform well.

Brand vs Performance: The real inefficiency is not spend, it's separation

If you have ever scaled performance spend only to watch marginal returns collapse, you already understand the cost of this false divide.

When brand is underinvested, performance channels are forced to work harder. CAC rises, creative fatigue accelerates, and growth becomes fragile. When performance is disconnected, brand investment struggles to demonstrate impact and is often deprioritized.

Mark Ritson has repeatedly called this out as one of modern marketing's most damaging myths.

"The best marketers don't choose between brand and performance. They manage both - deliberately."

Les Binet's data reinforces this. Brands that balance long- and short-term investment

The best marketers don't choose between brand and performance. They manage both - deliberately.

outperform those that chase efficiency alone.

Think of this debate similar to how Finance splits capital: Capex (Capital Expenditure) and Opex (Operational Expenditure).

1. The Brand Budget (Capex)

This is your investment in future cash flows. It creates "Mental Availability" - the likelihood that a customer thinks of you when they enter the category.

2. The Performance/Activation Budget (Opex)

This is your cost of sales. It exploits the mental availability you have already built.

Les Binet and Peter Field's research on the IPA databank suggests the optimal split for maximum growth is roughly **60% Brand / 40% Activation**.

While digital-native brands often start with a heavy activation skew (e.g., 70% performance to get off the ground), data shows they hit a "performance plateau" quickly. As the cost of acquiring the next customer rises, the only way to lower it is to turn on the "Brand" layer.

Brand as a Demand and Efficiency Multiplier

In many organizations, brand is still treated as a long-term asset with indirect impact. In a Growth OS, brand sits much closer to conversion.

A strong example comes from fintech platform Stripe. Stripe's growth is not driven by aggressive advertising, but by consistent brand signals embedded in product and experience - Clear documentation, Predictable pricing, Reliable performance across markets.

As a result, Stripe benefits from high trust and strong word-of-mouth, which lowers acquisition friction and improves conversion efficiency across channels.

This reflects Sharp's principle of mental availability. Brands that come to mind easily - and feel safe to choose - are selected more often.

For practitioners, this translates into clear actions:

- Distinctive brand assets must show up in performance environments
- Messaging should reinforce category entry points, not novelty
- Trust signals reduce friction before a click ever happens

In the Growth OS, brand doesn't sit above performance. It sits inside it - quietly improving efficiency every day.

Performance as a Learning System, Not Just an Optimization Engine

Performance marketing is often reduced to dashboards and bid strategies. That is a failure of ambition. At scale, performance channels generate some of the richest insight available:

- Which messages remove friction
- Which objections stall conversion
- Which moments actually trigger demand

In mature Growth OS setups, this intelligence feeds back into:

- Brand positioning
- Creative strategy
- Product and experience design

This reflects Ritson's emphasis on evidence-based marketing - using data not just to optimize media, but to improve strategy itself.

Experience Consistency: Where Growth Actually Compounds

Most growth models quietly fail after conversion. The Growth OS does not.

Customers don't just remember what brands say - they remember how brands behave, repeatedly. Every interaction becomes cumulative evidence of whether a brand can be trusted.

Consider Amazon. Its brand strength is built less on advertising creativity and more on relentless experience consistency: predictable delivery, transparent tracking, and low-friction returns. Each interaction reinforces the same promise. That consistency compounds trust - and trust compounds growth.

The same principle applies beyond global incumbents. In India, Zerodha scaled without traditional brand advertising by focusing on product reliability, transparent pricing, and investor education. By consistently delivering clarity in a high-anxiety category, Zerodha turned experience into its strongest growth engine.

Globally, fintech challenger Revolut followed a similar path. Rather than relying on mass communication, Revolut embedded trust directly into its product - real-time controls, instant notifications, and predictable service behavior across markets. That consistency, more than

creative expression, turned users into advocates.

In each case, scale followed consistency - not the other way around. In contrast, brands with strong creative identities but inconsistent experiences often see faster performance decay. Expectations are set high, but reality fails to keep up.

The Real Barrier to Growth OS: Organizational Design

If the Growth OS is so effective, why is it still rare?

Because most organizations are not designed to support it.

Most growth problems are not marketing problems - they are operating-model problems. Growth today is judged holistically by consumers, but still built in fragments internally. Brand, performance, CX, product, and now AI often sit in separate teams with different incentives, metrics, and planning cycles. The result is misalignment - not lack of capability.

A Growth OS requires an organizational "re-org" that forces integration. We need to move from "Departments" to "Growth Squads."

The "Pod" Structure

Instead of a Brand Department and a Performance Department, imagine cross-functional pods organized by customer loop:

- The Acquisition Pod: Includes a Brand Strategist, a Performance Marketer, and a Creative Director. Their shared goal is New Customer Revenue. The Brand person ensures the creative builds memory; the Performance person ensures it converts.
- The Retention Pod: Includes a CRM Lead, a Content Lead, and a Data Analyst. Their goal is Lifetime Value (LTV).

The Unified Creative Feedback Loop

The most powerful aspect of this operational shift is how it changes creative development.

- Old Way: Brand creates a "Big Idea" once a year. Performance teams chop it up into banner ads.
- Growth OS Way: Performance acts as the "Research Lab" for Brand.

What makes this shift more achievable now than before is AI.

AI is no longer a specialist tool - it is becoming a horizontal capability embedded across teams. Agentic systems can:

- Test and learn continuously across brand, performance, and experience
- Personalize at scale without fragmenting messaging
- Surface insights that cut across silos

Crucially, AI accelerates alignment only when brand principles are embedded into how systems are designed and governed. Otherwise, optimization becomes short-term and trust erodes at scale.

Powering the Growth OS as marketing leaders

As marketing leaders look ahead, the priority should not be another framework or channel strategy. The real questions are structural.

The year ahead will reward leaders who move beyond campaign calendars and attribution debates, and toward designing systems that learn, align, and compound over time.

The Growth OS doesn't eliminate campaigns. It gives them context. Every activation strengthens memory. Every conversion feeds learning. Every experience reinforces trust.

Growth, in 2026, will not be a department. It will be an **operating system**.

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DATA DRIVEN INTELLIGENCE

ADAPT & EVOLVE

LEARNING LOOP

From Campaigns to Continuous Learning Systems

Turning Marketing into a Learning Organism that Iterates, Tests, and Scales

by **Pratibha Singh** | DGM - Brand & Marketing, Dainik Bhaskar Group, India

Over the last five years, marketing has quietly crossed a fundamental threshold. What was once a discipline built around static campaigns, rigid calendars, and executive intuition is evolving into something far more potent: a continuous learning system. This is a marketing model that senses change in real-time, tests hypotheses against reality, and scales what works with clinical precision.

We are witnessing a marketing move from a downstream "execution" function to an adaptive growth system - one that sits closer to product development and corporate strategy than to traditional communications alone.

In today's volatile landscape, the most valuable marketing capability is no longer creativity or media scale in isolation. It is learning velocity.

The end of opinion-led marketing

Before pandemic, marketing followed a predictable, linear pattern. Annual plans locked teams into rigid assumptions for twelve months at a time. Campaigns were large, infrequent "big bets" with slow feedback loops.

This worked when markets were stable, and consumer behavior was linear. But it failed in environments defined by hyper-fragmentation and constant choice. Post-pandemic, we discovered that planning cycles measured in months are incompatible with a reality measured in days. Organizations that could systematically test, learn, and pivot survived and often grew. This moment marked the beginning of marketing as an applied science.

Test-and-Learn as a strategic discipline

At its core, test-and-learn is not a tactic but a mindset. It treats every marketing decision as a hypothesis to be validated by customer behaviour, not defended by internal consensus.

The operating model has shifted from **Launch → Measure → Move On** to a continuous loop of **Observe → Test → Learn → Adapt → Scale**.

Learning organisations no longer ask, "What should we say?" They ask, "What do customers actually respond to - and why?"

The payoff isn't just efficiency; it's strategic clarity. Weak ideas are stopped early, before they consume disproportionate budget. Strong ideas earn the right to scale.

Over time, this compounds into a sharper, evidence-led understanding of customers.

The Learning System

Framework:

What enables the shift

Moving from campaigns to continuous learning requires a repeatable system.

In practice, high-performing teams follow a consistent loop:

Observe → Test → Decide → Scale → Embed

Observe (Sense + Hypothesise):

Detect real world signals and frame early hypotheses (clearly articulate what is happening and why) - before jumping to solutions.

Test: Run controlled experiments - A/B tests, geo tests, holdouts, incrementality studies - designed to reduce decision risk, not validate prior beliefs.

Decide: Apply explicit rules: ship, iterate, or kill. Speed comes from clarity, not consensus.

Scale: Expand winning ideas with monitoring and feedback loops, not blind replication.

Embed: Ensure learning shows up in everyday decisions - briefs, creative principles, audience insights, UX patterns, and brand assets - so progress compounds over time.

This loop is what transforms marketing from episodic execution into a learning system. Campaigns may still come and go - but learning becomes continuous.

Learning Systems in Action: From Global Scale to Local Complexity

What learning organizations actually test

Many teams believe experimentation begins and ends with creative or landing pages. The most valuable learning happens upstream and downstream of messaging:

Value proposition: What promise genuinely triggers interest and pulls demand, rather than merely sounds compelling.

Conversion friction: Where momentum breaks - unclear pricing, slow journeys, trust gaps, or unnecessary steps.

Offer architecture: How trials, bundles, guarantees, and pricing frames shape perceived value.

Channel dynamics: How messages sequence, repeat, and follow users across touchpoints without fatigue.

Customer experience: The journey from first interaction to first value, including moments of support and recovery.

Brand memory: The cues, signals, and associations that make the brand recognisable and retrievable in buying situations.

The most advanced teams test not just what they say, but how the system behaves when customers interact with it. To understand how this operates in the real world, we must look at brands that have replaced 'planning' with 'experimentation infrastructure.'

1. Booking.com:

The experimentation flywheel.

Few organizations illustrate learning at a scale better than Booking.com. For over a decade, they have run thousands of concurrent experiments across every digital touchpoint. At Booking, authority never overrides evidence. Every change - from the color of a button to a pricing algorithm - is a hypothesis. This creates a flywheel: better experiences drive conversion, scale generates data, and data fuels faster learning. They don't 'do' marketing; they run a massive discovery engine that happens to drive global travel.

2. Swiggy:

The hyper-local learning loop.

If Booking.com demonstrates digital scale, Swiggy offers insight into how learning systems navigate the physical complexity of the Indian market. Swiggy's growth isn't just a result of logistics; it's a result of sensing. By using real-time data to test delivery routes, promotions, and restaurant selections at a neighborhood level, the system adapts to local shifts - weather, festivals, or traffic - without waiting for a head-office directive. Marketing is not a separate layer here; it is an integrated sensor in the learning loop.

3. HUL:

Legacy leadership in a digital age.

A common misconception is that 'learning organisms' are the exclusive domain of tech-born companies. Hindustan Unilever (HUL) is proving otherwise. In FY2025, HUL dramatically shifted its playbook, allocating 40% of its ad budget to digital and scaling its creator partnerships by 1,600% - from 700 to over 12,000 influencers. This isn't just a budget shift; it's an institutional move toward a social-first, data-driven engagement model that prioritizes real-time cultural relevance over traditional, top-down TV advertising.

Agile: The operating system for learning

Agile marketing provides the structural backbone for this transformation. It replaces big-bang campaigns with short, focused iterations led by cross-functional teams. The core principles are simple but transformative:

- **Responding to change** following a rigid plan
- **Rapid iteration** over one-off launches
- **Evidence** over subjective opinion
- **Collaboration** over departmental hierarchy

By design, agile systems normalize learning. Adaptation becomes routine, not exceptional. Marketing stops being a series of isolated moments and becomes a living system - one that improves itself continuously.

What this looks like in real life: the operating cadence

Learning systems run on rhythm. High-performing teams institutionalize learning through simple, repeatable rituals. This helps in making conversations shift from status updates to insight extraction - and decisions follow quickly.

Every week - growth check-ins focusing on signals and outcomes: what changed, what surprised us, and what we act on next.

Short experimentation forums exist to green-light tests, define risk boundaries, and prevent over-analysis from stalling momentum.

Monthly - Periodic narrative reviews ensure that rapid optimisation doesn't dilute brand coherence or long-term memory structures.

Quarterly - System-level audits, conducted a few times a year, surface

accumulated friction across the customer experience and reset priorities.

Over time, these rhythms turn learning from an abstract aspiration into an organisational habit - one that compounds quietly.

Resolving the Brand vs. Performance paradox

Modern marketing often frames short-term performance and long-term brand building as opposing forces. Learning systems dissolve this false divide.

Performance marketing benefits from rapid experimentation, but brand building also strengthens when treated as a system. Positioning, emotional resonance, and distinctive assets can be tested and refined over time.

The real shift is moving from assumptions about what builds a brand to observing what actually changes memory and behaviour. Learning organisations don't constrain creativity - they protect it by grounding it in a disciplined feedback loop.

The AI frontier: human judgment at the helm

As AI accelerates execution, the human role in marketing shifts from 'doing' to 'directing.' AI can optimize parameters at incredible speeds, but humans must decide which parameters matter.

In a learning system, the competitive advantage will not come from the AI itself - which will eventually be a commodity- but from:

- The quality of questions we ask about the data.
- The hypotheses we choose to prioritize.
- The ethical boundaries we set for our algorithms.
- The strategic clarity required to turn data into a narrative.

Five imperatives for marketing leaders

For those ready to turn their marketing department into a learning organism, five non-negotiables remain:

Build experimentation infrastructure:

You cannot learn without unified data and a 'single source of truth.'

Create psychological safety:

Learning dies where failure is punished. Leaders must reward the insight gained from a failed test, not just success.

Balance speed with rigor:

Fast tests without discipline produce false confidence. Learning must be both rapid and statistically reliable.

Integrate brand and performance:

Optimization without brand investment eventually caps your growth.

Develop human capability:

As AI handles the routine, invest in your team's strategic thinking and behavioral insight.

A 90-Day shift from campaigns to learning

For leaders looking to begin, the transition requires only intent and focus:

Days 1 - 30:

Identify key signals, align on one learning loop, protect test budget.

Days 31 - 60:

Run 5-10 meaningful experiments beyond creative alone.

Days 61 - 90:

Embed learnings into playbooks and decision rules.

Momentum comes from consistency.

Marketing as continuous discovery

The shift from campaigns to continuous learning is redefining modern marketing. The brands pulling ahead share a simple trait: they are willing to be wrong early to be right at scale.

In the years ahead, advantage will come less from technology and more from judgment. Enduring brands will redesign marketing as a living system: one that listens before it speaks, adapts before it amplifies, and grows through curiosity rather than assumption.



Marketing to Machines: When Algorithms Become Your Gatekeepers

by **Rah Mahtani** | Head of Marketing & Commercial Strategy, Alibaba.com, USA

We're entering a new era of marketing. Not an era defined by channels or formats or "the next platform," but one defined by audience. And that audience is increasingly nonhuman.

For the last 20 years, marketers fought to win attention. Now we're trying to win the model.

If the 2010s were defined by "mobile-first," we are now firmly in a machine-first marketing era. According to Pew Research, more than 62 percent of U.S. adults report using AI tools weekly to help make decisions or discover information (**Pew Research**). Gartner projects that by 2027, 25 percent of B2C search interactions will occur through conversational AI rather than traditional search (**Gartner**). AI assistants, and recommendation engines now sit between you and discovery, research, and trust at scale.

Apple's announcement that Siri will run on LLMs is already reshaping discovery. Google, Amazon, OpenAI, Meta, Alibaba.com, and others are doing the same. Voice assistants, chat interfaces, smart vehicles, search bars, your email inbox, your shopping apps... all powered

by models that factor in context, data, credibility, and relevance.

If you ask, "What's the best vacuum for pet hair?" or "What's a reliable first e-bike?" or "Where can I source logo hoodies?" the machine won't read you a list of blue links. It'll give you names. Maybe two. Maybe one.

Which means the core marketing question is changing:

Not "how do I get people to notice me?" But "how do I get models to trust me?" And the brands that win won't be the loudest. They'll be the most legible.

There is no doubt that AI is bringing newfound excitement to marketing. But here's the nuance that matters: machines are changing how people find brands, not why they care about them.

Creativity Still Wins (Even When Machines Are Watching)

Before getting too deep into optimization tactics, it's worth grounding ourselves in the basics. When I am working with my team on any campaign or content, there is one question I always ask: Why should people care about this?

Not 'will it trend?' Not 'is our brand visible in the first three seconds?' But 'will our customer care?'

For us, content earns its place if it does at least one of three things:

- Solves a real problem,
- Elicits an emotional response, or
- Reflects a shared human experience

That hasn't changed in an AI-driven world, and it won't change. If anything, these guiding principles are more important now than ever before. Algorithms can surface content, but they can't manufacture meaning. They can only amplify what already exists.

The risk many brands face today is confusing access with impact. You might win attention briefly, but without meaning, there's nothing to

convert that attention into meaningful engagements.

The Machine Audience is Already Here

It's tempting to think this shift is still theoretical. It isn't. Brands are already winning on the strength of their machine legibility.

- Dyson publishes detailed product specs and documentation in formats models can read and trust.
- Sephora standardizes beauty attributes so effectively that models understand undertones, finishes, ingredients, and use cases.
- Alibaba.com continuously refreshes product, pricing, and supplier data across millions of listings, making it machine-visible in a category that lives or dies on accuracy.

None of that happened by accident. All of it shows up in AI answers today.

Understanding the Machine Audience

To market effectively in this environment, brands need to understand how AI systems actually work. AI synthesizes, it doesn't rank. Unlike traditional search engines that present lists of results, AI assistants generate answers. They pull from multiple sources, weigh credibility, and produce a single narrative.

Modern AI systems rely on a mix of structured data and product feeds like your website, independent reviews and benchmarks including Reddit and Wikipedia, authoritative journalism, marketplace performance data, and user-generated content. Third-party validation in particular has huge implications and often outweighs your own brand messaging.

This has real implications. If your brand

isn't included in the underlying data, you will not appear. Machines don't respond to taglines. They respond to clarity, consistency, and corroboration.

Real-World Signals of Machine-First Brand Leadership

It's easy to point to Apple, Dyson, or Sephora and say "sure, of course they appear in AI recommendations." But the more interesting story is what's happening with mid-scale or challenger brands.

- Vuori shows up because its product positioning and reviews are incredibly consistent across retail channels and publisher coverage
- Liquid Death benefits from a strong point of view, user-led storytelling, and lots of third-party validation
- Our Place has structured product attributes, deep reviews, and detailed category context that help machines connect the dots

None of these brands got there through spending power. They built clarity and credibility into the system.

What this means for every brand

You don't need a massive budget, a Fortune 100 team, or a network of engineers. You just need to accept a simple truth: if data is the substrate for machine recommendations, then marketing needs to be measurable, structured, verifiable, and fresh.

And to make that useful rather than abstract, here's a framework:

Five Pillars for Machine-Legible Brands

1. Legibility (structured data)

Your product information shouldn't just be readable to people. It needs to be readable to models. That means clarity, consistency, and specificity.

Start with:

- structured product attributes
- complete specs
- ingredients and materials
- usage, purpose, and compatibility

Ambiguity is no longer mysterious. It's invisible.

2. Credibility (proof, not promises)

Models don't care how polished your copy is. They care how true it is.

Invest in social proof and reputation signals:

- third-party reviews
- expert citations
- earned media
- customer outcomes

If the internet vouches for you, the model will too.

3. Retrievability (everywhere models look)

Machines don't just scrape websites. They read everything.

Make sure the places models trust can see you:

- product listings
- how-to videos
- forums
- marketplaces
- documentation
- Q&A content

If you've ever wondered why an obscure subreddit post shows up in an AI-generated answer, that's why.

4. Freshness (up-to-date signals)

Models treat real-time data like a credibility multiplier. When your information is current, you're not just relevant. You're reliable.

This includes:

- inventory availability
- pricing accuracy
- shipping policies
- returns
- business descriptions
- product roadmaps

Stale data says "don't trust us."

5. Meaning (differentiation the model can name)

If you can't clearly articulate why you're different, the model will decide for you. Or worse, ignore you entirely.

Codify what sets you apart. Make it quotable. Make it repeatable. Make it easy to understand.

Identity isn't just branding anymore. It's metadata.

How AI Compresses the Consumer Journey

AI assistants are collapsing what used to be a multi-step funnel into a single moment of delegation. Instead of researching across dozens of tabs, consumers now ask questions like:

"What's the best product for my situation?"

The assistant answers. In many cases, this means the funnel disappears. This changes loyalty dynamics too. People increasingly trust the assistant that saves them time. If the system repeatedly recommends the same brands, those brands become defaults, even without traditional brand awareness. For challenger brands, this can be a real opportunity.

A 30-day activation plan

Week 1: Audit your data surface area

Inventory your product attributes, descriptions, reviews, and claims. Ask yourself: if a model were judging my clarity, what grade would I get?

Week 2: Build credibility inputs

Prioritize reviews, expert mentions, and independent writeups. Invite feedback, and remove friction from collecting it.

Week 3: Expand reach

Publish helpful content in the places machines already scan. Think simple: FAQs, troubleshooting, how-to demos, marketplace listings.

Week 4: Add freshness

Update policies, refine product pages, expand attributes, modernize language, and sync data across platforms.

AI as a Creative and Operational Partner

One area that's often misunderstood is the role of AI tools themselves. The most useful AI systems aren't designed to replace creativity. They're built to remove friction or complement your existing workflows. At Alibaba.com, we've leaned into specialized AI models that help business owners do three things better:

- Enhance creativity and productivity
- Streamline workflows, and
- Access deeper knowledge

For example, Accio (Accio.com) is designed to simplify sourcing for time-strapped founders. Beyond discovery, it surfaces insights like a product's long-term potential using historical and real-time sales data. That's not about chasing a moment. It's about making better decisions over time, to create sustainable supply chains.

When "Cheap Tricks" Become a Brand Liability

Working with small business owners every day at Alibaba.com, I hear a familiar

story on repeat. Someone posts a short-form video. It catches the algorithm just right and overnight, they sell thousands of units. It feels like magic

Here's where I want to keep it real. Modern platforms reward immediate engagement. That pressure often pushes brands toward gimmicks, trend-chasing, and surface-level hooks. But attention that lacks substance can erode trust over time or prevent you from having the opportunity to build trust in the first place.

If your brand only works when it's attached to a trend, then the platform is your brand. The moment that algorithm changes, it takes your perceived relevance with it. Strong brands use trends as a means to propel their reach to new audiences. Their meaning stays intact whether someone encounters them through an ad, a marketplace listing, or an AI-generated recommendation.

Optimizing for AI does not mean losing creativity. In fact, it means quite the opposite. You just need to sequence your creativity correctly. Like it or not, machines are gatekeepers to audiences. Successful brands design for both humans and machines because they have a sound understanding of the roles each plays.

A quick note on governance and risk

As brands increase their visibility across these data surfaces, two responsibilities emerge:

First, accuracy. Models reward correctness, and penalize contradiction. Overselling, exaggerating claims, or hiding complexity isn't just a bad look. It creates model confusion. And confused models exclude you.

Second, privacy. More data inputs mean more sensitivity around how information is stored, shared, and secured. Think of governance less like red tape and more like a seatbelt: rarely fun, always useful.

And if you want to future-proof: treat transparency like product design, not legal compliance.

How Do You Win Going Forward?

The brands that thrive in a machine-mediated world share five traits:

- Discoverable through structured, complete data
- Credible via independent validation
- Explainable through question-driven content
- Fresh with continuously updated information
- Meaningful to real people, not just systems

That last point matters most. Algorithms may decide who gets seen, but people decide who gets remembered.

Marketing has always been about shaping perception. The only thing that has changed with the onset of AI is who introduces your brand. AI systems now act as translators between brands and people by summarizing, comparing, and recommending. But they can only work with what you give them.

The future belongs to brands that respect the gatekeepers without surrendering their soul.

If your brand stands for something clear, useful, and human, machines will carry that meaning forward. If it doesn't, they'll flatten you into a commodity.

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The Responsive Brand: Building for Cultural, Economic, and Technological Volatility

How brands build adaptive systems that evolve without losing coherence.

Sandeep Nair | Co-Founder, David & Who. Ex-P&G and Swiggy brand lead. LinkedIn Top Voice

In December 2017, Patagonia replaced its homepage with a stark message. It read, "The President Stole Your Land". The company was responding to Trump's decision to reduce protected monument lands in Utah. As with all things in this post-truth world of ours, it led to mixed reactions. Some conservatives vowed to boycott Patagonia. Others bought Patagonia for the first time because of the stance.

In the days after, Patagonia's online sales spiked to many times their usual level, and the company went on to post record sales during the Trump years. More importantly, the brand's meaning hadn't shifted an inch. They'd been the environmental activist brand for decades. What changed was how they expressed that meaning for a specific cultural moment.

How do you build a brand that can do that - respond to volatile moments without losing itself? The answer lies in understanding that brands operate as a system with different components moving at different speeds, held together by coherent logic rather than rigid uniformity.

The Three Speed Brand System

Consider Guinness, a drink I am quite fond of. The harp has been the core of their logo for more than 150 years, even as designers redraw it every few decades. The beer itself is still the same dark, creamy stout. The positioning as a drink worth waiting for persists. But everything else has adapted. In the 1980s, Guinness advertising celebrated working-class Irish pub culture. By the 2000s, it featured surfers and mythical white horses, targeting younger, global audiences. Today, Guinness sponsors rugby and creates limited-edition brews. The foundation stayed

firm while the surface layer moved with the culture.

Brands operate as a system with different components moving at different speeds, held together by coherent logic rather than rigid uniformity.



Brands should operate across three distinct layers, each moving at its own speed:

Layer 1: Brand Essence (Decade + horizon)

This moves slowly and deliberately, changing only when the market fundamentally transforms. It consists of:

Core meaning: Who you serve and why it matters to them

Foundational distinctive assets: The 2-3 codes that are non-negotiable (Guinness harp, Tiffany blue, Intel's sonic logo)

Strategic positioning: Your place in the customer's mental landscape

For IKEA, it's about making good design accessible to the masses. Patagonia's brand essence is environmental activism through business.

Brand essence changes rarely, and usually only when the market transforms fundamentally. Microsoft's pivot from "a PC on every desk" to "empower every person and organization" represented true essence transformation. The shift reimaged who they served (IT departments to knowledge workers) and why it mattered (ownership to access). Kodak's failure to transform from film to digital photography fast enough shows what happens when essence protection becomes ossification.

Layer 2: Brand Expression (3–5 year horizon)

This layer responds to cultural shifts and major competitive moves, but with patience. It is made up of:

Positioning articulation: How you communicate your meaning for current cultural context

Product portfolio strategy: What you offer and how it's organized

Channel presence: Where you show up and how

McDonald's essence hasn't changed in seventy years. It sells accessible food that feels consistent wherever you go. Their expression evolved from in-store playgrounds that made it the de facto family hangout in the 1980s and '90s to McCafé launches in the late 2000s and 2010s that pushed into premium coffee, competing with Starbucks and fast-casual chains, to mobile ordering and delivery partnerships today. The meaning stayed constant while the expression adapted.

Layer 3: Brand Execution (Quarterly to annual)

This is where you respond to economic cycles, platform changes, and emerging opportunities. Here, we get more tactical:

- Campaign messaging and creative
- Pricing and promotional strategy
- Tactical channel optimization
- Content and community engagement

Experimentation lives here because the cost of failure is low and the learning compounds quickly. When inflation spikes, your execution layer might emphasize value without touching your premium positioning. When a cultural moment emerges, your execution layer can respond immediately while your essence stays untouched.

Nike's "Dream Crazy" campaign featuring Colin Kaepernick operated entirely at the execution layer. The essence (everybody is an athlete) didn't change. The expression (serving athletes of every level with serious performance gear) remained stable. The execution responded to a specific cultural moment with a message that would have been far less likely a decade earlier but resonated powerfully in 2018. Some customers burned their shoes in protest, but Nike's stock hit an all-time high within about ten days of the campaign announcement. The brand knew exactly who it served and why it mattered to them.

The Coherence Test

Here's the test I use with most founders and CMOs I advise: Take your latest campaign. Now trace it backwards. Can you draw a clean line from that execution through your expression layer to your essence? If you're hesitating, or if the connection requires three paragraphs of explanation, you've already drifted.

If you can't explain how your latest product launch connects to your core meaning, you're chasing trends rather than building a brand.

Why Brands Fail At This

Most CMOs understand brand building intellectually. Yet they still optimize themselves into oblivion. Why?

The error is treating volatility as a problem to solve rather than a design constraint to build around. When markets shift, when competitors move, when platforms change, the instinct is to respond everywhere, immediately. Leadership interprets agility as speed across all brand elements.

This creates what I call "the coherence collapse." Performance metrics pull resources toward execution-layer tactics. The CAC dashboard lights up red, and suddenly the entire organization mobilizes to fix activation while essence erodes quietly. Brand building gets deprioritized because its impact shows up in eighteen months, not eighteen days.

The organizational dynamics reinforce this error. Execution-layer teams are larger, louder, and armed with daily data. Essence-layer guardians are smaller, quieter, and working on horizons that don't fit in quarterly reviews. When both groups compete for budget, short-term measurability wins.

The Portfolio Balance Principle

Founders and CMOs need to look at marketing budget allocation like a VC would look at their portfolio.

Based on patterns I've observed across resilient brands - those that maintain coherence through multiple market cycles - resource allocation tends to cluster around:
20% in Essence: Protection and occasional recalibration of core meaning
30% in Expression: Deliberate evolution of how you articulate positioning
50% in Execution: Rapid response and optimization

These aren't rigid targets. A brand in a rapidly transforming market might allocate more to essence recalibration. A brand with rock-solid foundations in a stable market might push 60% to execution. The principle remains: match resource allocation to the operational speed of each layer.

I've seen this pattern collapse with most D2C brands. Leadership panics when there is a quarter of weak sales. Suddenly every dollar flows to performance marketing. The logic seems sound - we need revenue now, brand building can wait. Eighteen months later however, acquisition costs have doubled and nobody can explain what the brand stands for anymore.

The imbalance works both ways.

Brands that put 80% in execution chase every trend while brand equity disappears.

Three years later, they're spending more to acquire customers and wondering why retention is so low.

On the other hand, brands that put 80% in essence protect heritage so ferociously that they miss market transformations. They win brand recognition studies while losing market share.

How AI Amplifies Each Layer

The three-speed system existed before AI. What's changed is the scale and speed at which brands can operate, and the new ways they can break themselves.

Meanwhile, the brands winning with AI use it differently across all three layers.

At the Essence level, AI functions as a guardian. When you're creating thousands of asset variations, AI-powered brand governance ensures every version maintains your distinctive codes. When you're operating across dozens of markets, automated compliance systems prevent local teams from diluting your meaning in pursuit of short-term performance.

At the Expression level, AI functions as a synthesizer. It accelerates pattern recognition across cultural shifts and market signals. It helps you identify emerging customer needs from conversation patterns across channels.

At the Execution level, AI functions as an optimizer. It helps you run campaigns that adapt the creative in real-time based on context. It optimizes pricing dynamically and tests message variations at scale.

Most brands deploy AI primarily at the execution layer - with dynamic creative optimization, predictive targeting, and real-time personalization - without strengthening the essence first. The result is simply that the brand team gets faster at drifting off course.

Organizational Implementation

But who owns each layer in this framework? In brands that maintain coherence, ownership aligns with operational speed. Essence decisions belong to the C-suite with annual review cycles.

Expression decisions belong to brand leadership with multi-year planning horizons. Execution belongs to marketing teams with weekly or monthly optimization cycles. The mistake most companies make is letting whoever's loudest in the meeting room determine which layer they're operating in. The performance marketing lead argues for a positioning shift because it would improve CTR. The CEO decides campaign creative because they have an opinion. Layer confusion breeds incoherence.

Clear governance prevents this. When someone proposes a change, the first question isn't "will this work?" It's "which layer are we changing, and does that match this decision's authority and timeline?"

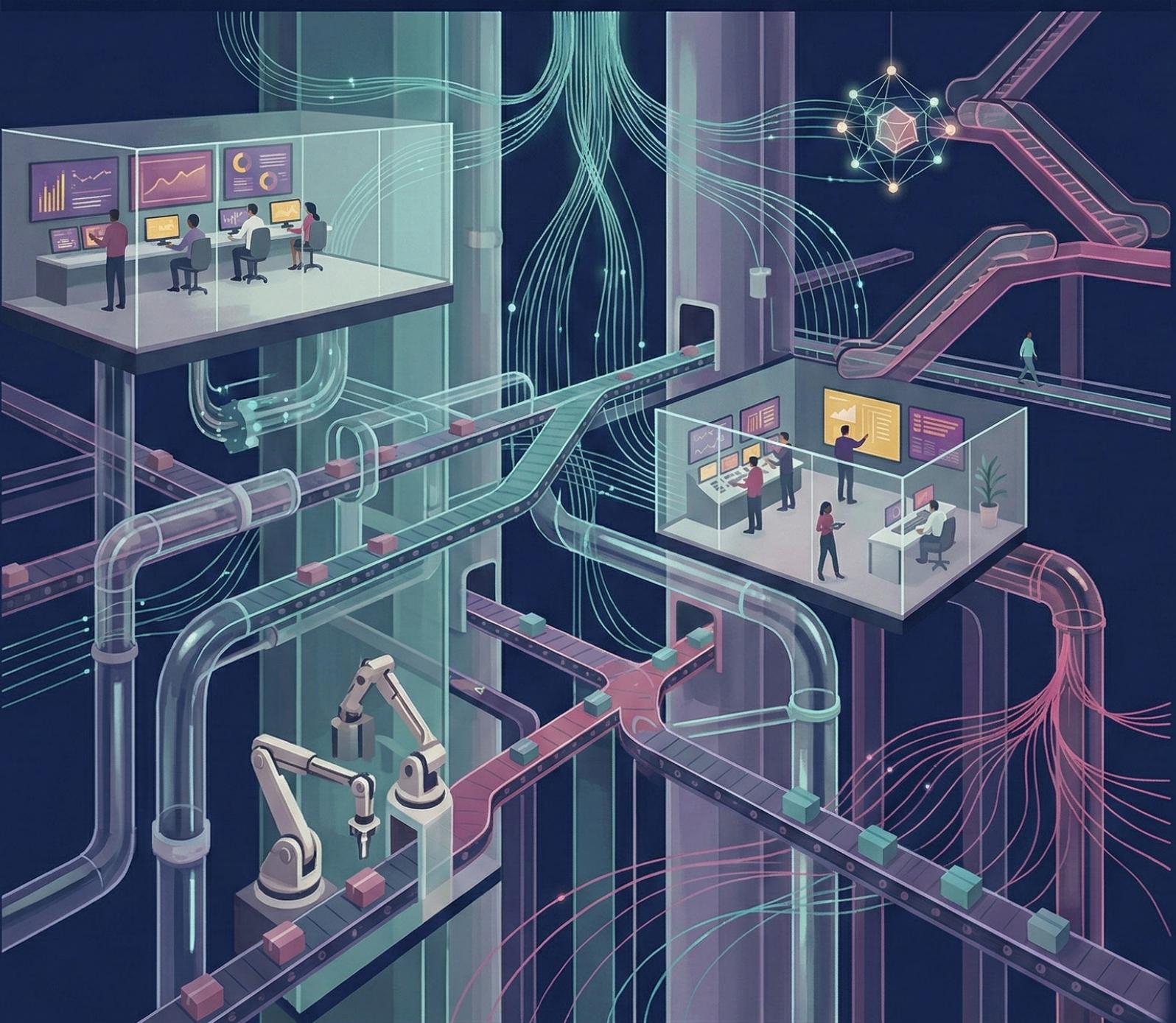
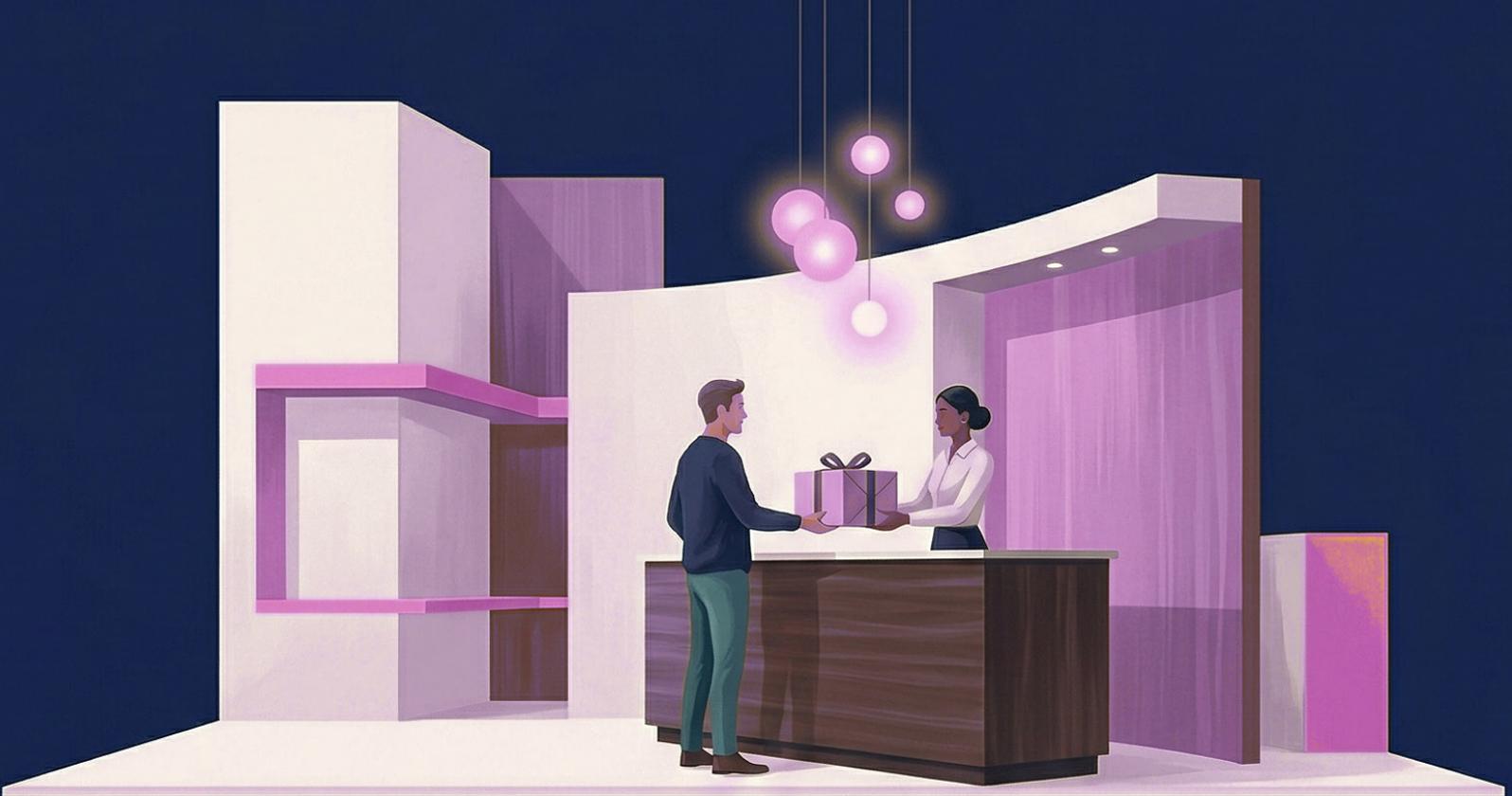
Maintaining Balance Through Volatility

Patagonia's homepage takeover in December 2017 worked because the company had spent forty years building an essence that could absorb that moment. When they declared "The President Stole Your Land," some customers saw betrayal. Others saw the brand they'd always known, finally speaking plainly about something that mattered. The sales spike that followed didn't happen because Patagonia discovered a clever marketing tactic. It happened because their essence was strong enough to withstand a divisive execution-layer bet.

The brands that will survive the next decade of volatility won't be the ones that move fastest or optimize hardest. They'll be the ones that know which parts to protect and which parts to let move. Get the speed right for each layer, and you build a brand that can bend without breaking.

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The Invisible Experience: Moments Customers Feel but Never See

Designing backstage processes that transform perception - fulfillment, support, data flows, failure recovery.

by Anand Sankara Narayanan | CMO, Finance House Group, UAE

Customers rarely witness the machinery that produces their experience. They do not see routing logic. They do not see ticket prioritization. They do not see data reconciliation, fraud checks, inventory syncs, or handoffs between teams.

And yet they feel the consequences of those systems instantly. They feel it in how fast something arrives. They feel it in whether they must repeat themselves. They feel it in whether a promise holds when something goes wrong.

What customers perceive as a brand is often the emotional output of backstage design.

For decades, organizations have concentrated a disproportionate share of investment and leadership attention on the visible layer of the experience. Advertising, interfaces, retail environments, messaging hierarchies, design languages,

and campaigns are debated, refined, and optimized with great sophistication. These elements are important, and in many categories they remain decisive. However, in markets where competitors can quickly replicate communications and aesthetics, differentiation increasingly migrates downward into the infrastructure that enables promises to be kept repeatedly and at scale.

The brands that are pulling away from their competition are not merely communicating better. They are operating better in ways customers may never observe but can immediately sense.

The shift from touchpoints to transmission

Traditional journey mapping has trained leaders to think in episodes. Awareness leads to consideration, consideration to conversion, conversion to service, and service to retention.

Each stage is assigned an owner, metrics, and optimization targets. The model is tidy and operationally convenient.

Customers, however, do not experience brands in stages. They experience continuity.

From their perspective, the brand is a stream of signals unfolding over time. The advertisement they saw last week, the checkout flow they encountered yesterday, the delivery they received today, and the support conversation they might have tomorrow are not separate artifacts. They are cumulative evidence of whether the organization is coherent, competent, and trustworthy.

Between what a company says and what a customer lives sits a transmission system. This system is largely invisible, but it determines whether intent survives execution. When transmission

is weak, brand equity dissipates. When it is strong, confidence compounds.

What lives backstage

The invisible layer is where operational truth resides. It includes:

1. Order orchestration
2. Identity resolution
3. Inventory accuracy
4. Credit approvals
5. Fraud decisions
6. Delivery routing
7. Escalation logic
8. Refund authorization
9. Knowledge management
10. Internal SLAs
11. Data freshness
12. Exception handling

None of this appears in a campaign. All of it determines whether the campaign is believed.

Attention creates interest, but reliability creates trust

Visible moments are excellent at attracting attention. They generate curiosity, emotional lift, and memorability. But trust, which is the basis of durable commercial advantage, is formed elsewhere. It emerges from repeated demonstrations that the organization behaves predictably, particularly when conditions are imperfect.

Service research has long shown that effective recovery from failure can increase loyalty more than flawless delivery. The reason is straightforward. In failure, customers glimpse the real system. They observe whether the company takes responsibility, whether it is empowered to act, and whether it values the relationship more than the transaction. Under stress, authenticity is revealed.

In this sense, breakdowns are diagnostic.

They illuminate the integrity of the invisible architecture.

The most powerful experiences customers never notice

When backstage systems function well, customers rarely articulate their appreciation in technical terms. They simply move forward.

No email is sent saying, “*Thank you for resolving my data conflict across three platforms in 0.4 seconds.*”

Instead they say, “That was easy.”

Ease is the language of invisible excellence.

Amazon did not win because of advertising

Consider Amazon, whose market leadership is frequently attributed to scale and assortment. Yet the deeper source of its advantage has been relentless investment in backstage capability. Delivery predictability, transparent tracking, low-friction returns, and automated refunds have systematically reduced the cognitive load of transacting. Over time, this reliability creates behavioral habits. Customers default not because they are persuaded each time, but because deviation feels unnecessarily risky.

Advertising may introduce a brand. Infrastructure makes it routine.

The economics of invisibility

When backstage systems improve:

- Support cost declines
- Repeat contacts reduce
- Conversion friction drops
- Refund leakage shrinks
- Time to value accelerates
- Lifetime value increases

Yet these gains are rarely attributed to brand. They should be. Because perception changes when effort disappears.

Experience debt: The silent liability

Every workaround creates future pain. When systems do not talk to each other, humans compensate. Teams patch gaps. Agents apologize. Customers repeat information.

This accumulation becomes an experience debt. It behaves exactly like technical debt. At first, it is manageable. Eventually, it slows growth, raises cost, and erodes belief.

Most companies do not lose customers because competitors shout louder. They lose because the invisible layer becomes exhausting.

Mapping the invisible

If leaders want to manage what customers feel, they must audit what customers never see. Here is a practical diagnostic framework.

1. Promise versus process

Where might internal mechanics contradict the external claim?
Example: instant approval marketed, manual review required.

2. Handoff integrity

How many times must information be re-entered or revalidated?

3. Latency exposure

Where do delays hide that customers interpret as indifference?

4. Failure choreography

What happens when things break? Who owns recovery?

5. Memory load

How hard must customers work to continue a relationship?

The Invisible Experience Pyramid

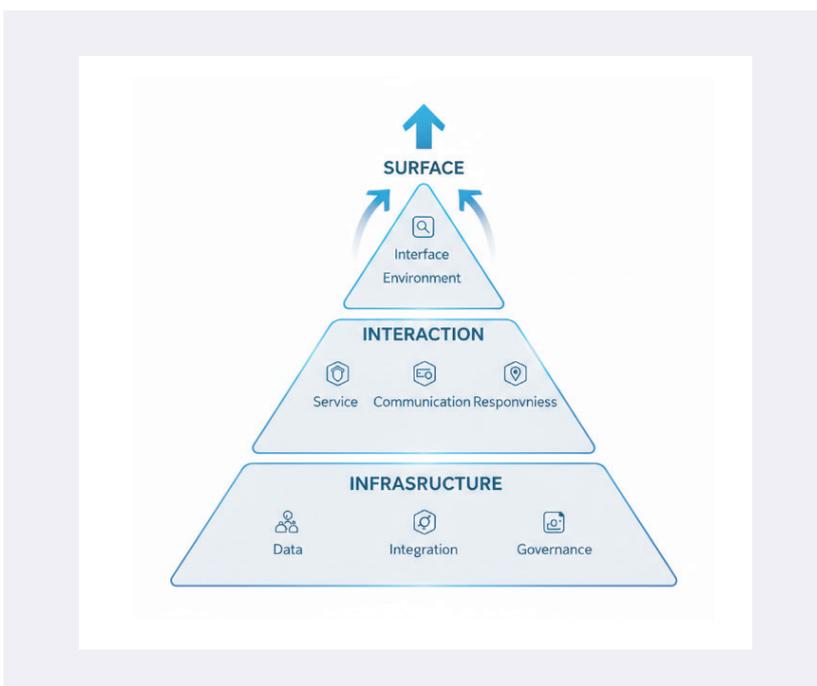
Think of experience in three layers.

Surface – interface, messaging, environment.

Interaction – service, communication, responsiveness.

Infrastructure – data, workflow, integration, governance.

Most investments sit at the top. Most impact sits at the bottom.



Designing for invisibility

Here are five high-leverage moves leaders can implement.

1. Create a single narrative of the customer

Unify identifiers across systems so the organization remembers.

2. Instrument friction

Track repetition, transfers, delays, escalations.

3. Reward prevention, not heroics

Celebrate the issue that never reached the customer.

4. Build recovery playbooks

Pre-approve gestures, refunds, and decisions.

5. Connect marketing to operations

Every promise must have an owner.

AI will amplify whatever exists

As artificial intelligence becomes embedded across workflows, the integrity of the invisible layer becomes even more consequential. Automation does not repair misalignment; it accelerates it. Inconsistent data will propagate inconsistency faster. Conflicting policies will be enforced more efficiently. Errors that once occurred sporadically will occur systematically.

Therefore, before intelligence, alignment must be achieved.

The competitive future belongs to backstage excellence

Customers will increasingly rely on systems, assistants, and automation to choose, buy, and renew. These intermediaries reward reliability. They privilege brands that reduce variance. Which means the invisible layer becomes

the most visible differentiator.

The leadership question

Not: How do we improve communication?

But: **Where does reality fail the promise?**

Because customers forgive imperfect messaging. They rarely forgive repeated inconveniences.

A 90-day action roadmap

For teams ready to begin, here is a pragmatic starting sequence.

| | |
|------------|--|
| Days 1–30 | Map top friction sources. Quantify repetition and delay. |
| Days 31–60 | Prioritize the failures with the highest emotional impact. Assign ownership. |
| Days 61–90 | Fix root causes. Automate recovery. Update scripts and metrics. |

Repeat and iterate while the learning compounds alongside.

What customers will say

They will not describe your APIs. They will not celebrate your integrations.

They will say:

“It just works.”

“They made it easy.”

“They took care of it.”

That is invisible experience design succeeding.

Final thought

Brand is not what you say. It is what remains reliably true when no one is watching.

The future of advantage will belong to organizations that engineer trust beneath the surface, where customers cannot see the system but can feel its integrity.

Meet the team

State of the Brand



Anand Sankara Narayanan

Curator

Anand is a strategy-first brand builder with over 17 years of cross-industry experience, operating at the intersection of business growth, human insight, and culture-led creativity. He is a keynote speaker at leading marketing forums, sits on the jury screening council for the MMA Smarties X Global and North America awards, and is a Forbes Communications Council member, writing on marketing and customer centricity for Forbes.com.



Diya Susan Pallikal

Creative Director

Diya is an independent, award-winning creative professional who thrives on tackling creative challenges and visually articulating a brand's strategy and messaging. Proficient in both creative endeavors and athletic pursuits, she brings a unique blend of skills to her work. Diya has contributed to some of the foremost brands, defining their identities and creatively expressing their brand strategies. Her work has been featured in 'Lürzer's Archive - 200 Best Packaging in the World' and showcased on 'Ads of the World' and 'Packaging of the World'.



Prashanth Sridhar

Creative Strategist

Prashanth is a Co-founder at Adwants - an independent creative agency. He collaborates with top-tier brands to craft communication strategies and offer business advisory to enhance their brand presence. As a neuro-science enthusiast, he combines entrepreneurial flair, sharp business acumen, and a deep psychological understanding of marketing dynamics. He champions a human-centric approach to advertising, ensuring strategies resonate authentically with audiences.

State *of the* Brand ²⁰²⁶

Most brand thinking circulates in boardrooms, agency decks, and conference keynotes, and rarely makes it into the hands of the people who need it most.

State of the Brand was created to bridge that gap. Each year, a select group of senior marketing leaders from across the world contribute their sharpest thinking on where brand strategy is heading and why it matters.

The result is a digest built not for spectators, but for practitioners.