AI and Marketing Strategy

Prepared for

April 2024

Background

Our understanding of your needs:

- Client X's has implemented a Customer Data Platform (XX), and are currently exploring ways to fully harness its capabilities
- While there have been discussions and potential initiatives to drive the integration of AI, its application remains uncertain and the strategic direction for leveraging generative AI and first-party data remains to be defined
- The current marketing landscape is predominantly agency-driven, with XX handling most marketing services, leading to challenges in campaign ownership and a significant gap in bidirectional data flow; this existing structure constraints Client X's ability to access critical campaign insights, limits the organization's ability to shape their customer journey and experience, and potentially leaving additional "share-of-bar" on the table

Key areas where Client X needs to advance in their Marketing and AI journey:

- **Unified Vision:** Achieve consensus on a clear and actionable AI and first-party-data vision that supports marketing objectives and overall business goals
- **ROI & Competitive Advantage:** Highlight ROI, potential lost-revenue, and competitive advantage of leveraging first-party-data and AI
- **Internal Alignment:** Foster enthusiasm and understanding of the vision and roadmap across key stakeholders

- **Roadmap from Insights to Action:** Convert insights from ~26 internal interviews into a structured roadmap towards effective AI integration
- **Strategic Imperatives:** Establish core strategic principles that serve as catalysts for AI adoption in Client X
- **Ownership:** Identify core marketing activities that can be efficiently outsourced and discern functions that require direct control to enhance data-driven decision-making

Meet Your Consulting Company Team

- **XX**
  Enterprise Account Executive

- **XX**
  Industry Director - Consumer Products

- **XX**
  Practice Director - Marketing Services

- **XX**
  Practice Director - Growth Marketing

- **XX**
  Practice Director - Data & AI

Consulting Company will build upon the foundation Client X has established, enhancing your AI and marketing capabilities

Client X's Data & AI Journey

- Client X has conducted **26 internal interviews** to understand how AI can enhance workflows and tasks

- **Introduced a CDP 2 years ago**, currently underutilized in driving membership and product engagement across their 4 main SKUs in retail and an additional 40+ SKUs available on the website and at the vineyard

- **D2C Channels:** Currently, D2C sales are maintained through their website and vineyard visits, offering a wide range of 40-45 SKUs

- **Competitive Analysis:** Analyzed other beverage company (e.g., PepsiCo's) cross-portfolio website to inform their own brand experience strategies

- **Marketing Accelerator:** An internal team of ~70 team members focusing on marketing innovation in Client X overall

Industry Perspective

- **First-party data is increasingly crucial** and quickly becoming an enterprises' competitive advantage in the consumer products industry given the need for more personalized consumer experiences and diminishing accuracy and utility of third-party data; **with effectively leveraging first-party data driving 2.9x revenue uplift and 1.5x cost savings in key marketing functions.**

- Enterprises leverage first-party data in three key categories:

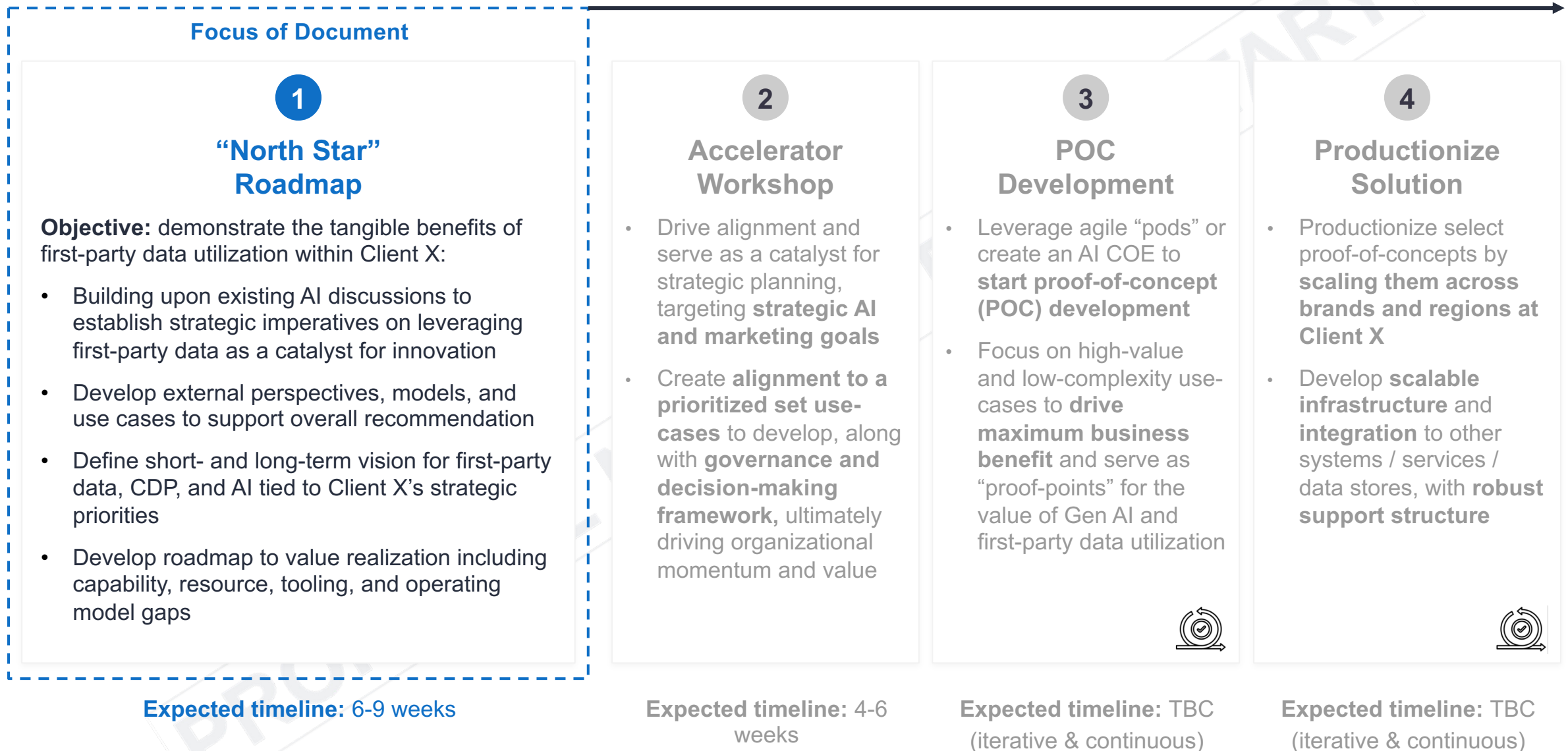|		
Insights	**Engagement**	**Measurement**
Consumer Research, Audience Definition, Segmentation, Behavior Analysis	Personalization, Content Generation, Re-targeting, Lifecycle Marketing	Media Mix Modeling, Multi-touch Attribution, A/B Testing, Lift Modeling

- **First-party data is also critical in the adoption of Gen AI**, as companies need large amounts of first-party data to train LLMs and develop internal and customer facing applications.

- **Consulting Company have supported our consumer products clients end-to-end on their Gen AI journey**, developing capabilities in dynamic image generation (incl. LLM switching), digital consumer personas, product innovation acceleration, customer insights, personalization, and have seen **60-70% cost savings and >50% increased effectiveness across deployments**.

Tailored four-phase approach to drive end-to-end AI adoption

1 — "North Star" Roadmap

Objective: demonstrate the tangible benefits of first-party data utilization within Client X:

- Building upon existing AI discussions to establish strategic imperatives on leveraging first-party data as a catalyst for innovation

- Develop external perspectives, models, and use cases to support overall recommendation

- Define short- and long-term vision for first-party data, CDP, and AI tied to Client X's strategic priorities

- Develop roadmap to value realization including capability, resource, tooling, and operating model gaps

Expected timeline: 6-9 weeks

2 — Accelerator Workshop

- Drive alignment and serve as a catalyst for strategic planning, targeting **strategic AI and marketing goals**

- Create **alignment to a prioritized set use-cases** to develop, along with **governance and decision-making framework,** ultimately driving organizational momentum and value

Expected timeline: 4-6 weeks

3 — POC Development

- Leverage agile "pods" or create an AI COE to **start proof-of-concept (POC) development**

- Focus on high-value and low-complexity use-cases to **drive maximum business benefit** and serve as "proof-points" for the value of Gen AI and first-party data utilization

Expected timeline: TBC (iterative & continuous)

4 — Productionize Solution

- Productionize select proof-of-concepts by **scaling them across brands and regions at Client X**

- Develop **scalable infrastructure** and **integration** to other systems / services / data stores, with **robust support structure**

Expected timeline: TBC (iterative & continuous)

"North Star" Roadmap: develop a unified vision and plan for marketing innovation at Client X

Duration of engagement: 6 to 9 week total

Strategic Vision & Imperative

~2–4 Weeks

Define strategic imperative and vision for Client X's data, CPD, and AI journey

Key Activities

- Kick-off, establish roles and confirm key meetings
- Finalize project scope (regions, brands, users)
- Review previous internal research on AI
- Conduct primary (interviews) and secondary research (public and private sources)
- Create strategic imperative and vision for data, CPD, and AI at Client X
- Prepare for executive leadership presentation and read-out

Roadmap & Capability Assessment

~3–5 Weeks

Develop roadmap and identify capabilities needed to achieve strategic vision

Key Activities

- Update previous phase findings based on executive feedback
- Develop plan and roadmap to achieve overall vision
- Draft capabilities report according to Client X's business objectives
- Conduct gap analysis, develop resource plan and operating model recommendations
- Socialize findings and prepare for accelerator workshop

Proposed Project Outputs and Deliverables [to be aligned during delivery]

1. **Strategic Imperatives:** define the strategic imperatives for Client X's to leverage data, CPD, and AI

2. **External Data Points**: identify external perspectives, models, and use cases to support overall recommendation

3. **Short- and Long-term Business Goals:** develop a set of realistic objectives associated with strategic imperatives and Client X's business priorities

4. **Executive Read-out**: support executive leadership preparation and presentation

5. **High-Level Roadmap:** outlining the key phases, milestones, and metrics required for AI adoption and unlock the power of first-party data

6. **Capabilities Analysis:** comprehensive report detailing the capabilities required to achieve strategic vision and roadmap, including tools, technologies, and resources

7. **Operating Model**: develop an operating and organizational model (e.g., COE) POV

8. **Workshop Planning:** detailed plan for the upcoming workshop, including the agenda, participant list, and intended outcomes, laying the groundwork for subsequent phases of strategy implementation and organizational transformation

Consulting Company has assembled a team of professionals to ensure the project's success, each with a unique role within our engagement framework

Client X Stakeholders

Sponsor (Matt H.)

SMEs (TBC)

Stakeholders (TBC)

Consulting Company Execution Team

Business and Marketing Strategist

Consulting Company SMEs

MarTech Specialist

Data Architect

Consulting Company Funded
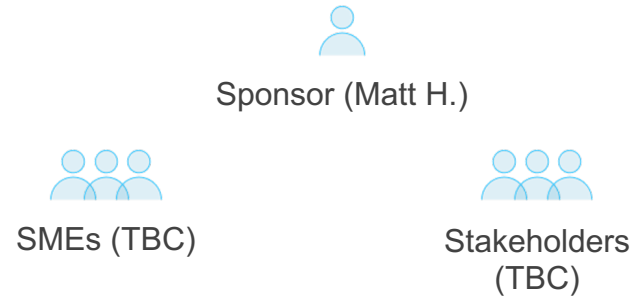
- **1 to 2 hours per week**
- Provide overall vision / guidance, review and make key decisions, final sign-off
- Review and provide feedback on strategy / plan / roadmap

- **1 to 2 hours per week**
- Interviews and workshops with business stakeholders
- Provide "on-the-ground" insights and guidance
- Review and provide feedback on strategy / plan / roadmap

- **Consulting Company Talent (20-30 hours per week)**
- Project main points-of-contact
- Management consultant with expertise in marketing, innovation, and consumer products
- Responsible for all analysis, client interactions, and outputs and deliverables
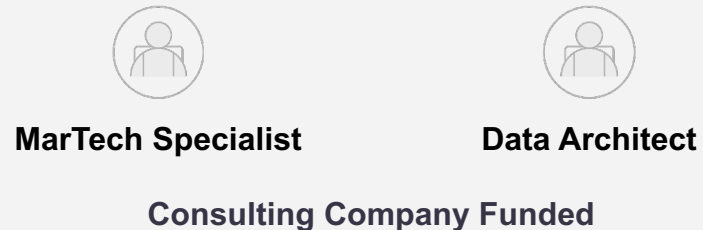
- **Consulting Company Talent, Consulting Company Funded (on-demand)**
- Technical subject matter experts with extensive experience in the consumer products to be leveraged on-demand and provide insights, and provide advice on marketing technology, CPD adoption, data architecture, and data infrastructure
- Review requirements and current usage across tech-stack to identify optimization opportunities
- Facilitation of data governance and adherence to business processes

Example Business and Marketing Strategist Profiles

Click on picture to view full public profile

XXX
New York

Expertise
Business Plan Consulting
Change Management
Go-to-market Strategy
Value Proposition Design
Growth

Overview
XXX is a seasoned independent consultant renowned for her expertise in spearheading the development and execution of innovative solutions and executing high-complexity projects.

Relevant experience
XXX served as the Head of Strategy & Operations at WeWork, where she orchestrated strategic initiatives and operational frameworks. Her tenure was marked by transformative leadership and the successful integration of operational strategies that aligned with core business objectives. Earlier in her career, as a consultant with Bain, Jackie honed her expertise in delivering data-driven strategic counsel across various industries.

PREVIOUSLY AT

BAIN & COMPANY ◔

XXX
New York

Expertise
Growth strategy
Market Segmentation
Business Transformation
Market Research
Business Strategy

Overview
XXX is a strategy and management expert with 20+ years of executive experience. He has managed dispersed cross-functional teams to deliver large-scale award-winning programs that have transformed organizations globally.

Relevant experience
At a beverage company, XXX created strategic recommendations for the CEO on GTM, market research and personas, and product strategy. He created an annual marketing plan for premium hard cider and shifted budget to focus on high-growth activities to expand the footprint and reach new customer segments.

PREVIOUSLY AT

DIAGEO   **BCG** BOSTON CONSULTING GROUP

XXX
Bengaluru, India

Expertise
Digital Strategy
Market Research & Analysis
Competitor Analysis & Profiling
Mergers & Acquisitions
Business Plan Consulting

Overview
XXX has delivered 30+ projects including growth strategies and business plans; pitch decks; and branding and digital strategies. He has a demonstrated track record in planning and delivering complex transformations ranging from $2 million to $1 billion.

Relevant experience
XXX conducted a market feasibility study for a leading Japanese company for their potential market entry in the AI/ML space within the chemicals and materials (C&M) sector.
For a Sweden-based spirits company, he conducted market research for one of their new product lines.

PREVIOUSLY AT

Goldman Sachs   **KPMG**   **EY**

Commercial Considerations

Consulting Company experts set their own rates as a function of their working location and what their skills can carry in the market.

The ranges below can be used for planning purposes – but should not be viewed as absolute.

There are individual experts who will fall above and below these ranges, allowing us to flexibly assemble a team within project constraints.

Role	Hourly Rate	Weekly Rate (assume ~20-30 hours per week)	Estimated Total Cost
Business and Marketing Strategist	$170 - $230	$4,000 - $5,500	
MarTech Specialist	N/A (Consulting Company Funded)	N/A (Consulting Company Funded)	**$28,000 - $38,500**
Data Architect	N/A (Consulting Company Funded)	N/A (Consulting Company Funded)	

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Enterprise Account Director

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PROPOSAL NERDS PROPRIETARY