



Building enterprise value through sustainable brands

A manifesto for business leaders

**we
are**

BXG
THE BRAND EXPERIENCE GROUP
Unifying consumers & brands for a better future

A Message from the Chairman

An open letter to business leaders ...



So why should the Brand Experience Group (BXG), a marketing analytics business, have the presumption to publish a global manifesto for sustainability and brands? There are two reasons. First, we are facing unprecedented social and environmental challenges that governments are failing to address and civil society has not yet found the means to solve. More and more business owners, leaders and investors are recognising that most Corporate

Social Responsibility initiatives, while well-intentioned, are too little too late to have the impact needed. Instead, we need transformative change at scale and only major businesses, and their associated eco-systems, have the capacity and capability to deliver this.

Second, BXG has an important role to play and this manifesto sets out our commitment. If businesses are to lead this transformation, as only they can, they have to take citizens and consumers with them on the journey. Only by harnessing the power of consumer choice globally can we deliver change at the scale and pace needed. Ultimately it will be the ideas, values and consumer connections with authentic brands as ambassadors for sustainable business behaviours that will shape our collective future. This requires an objective and consistent basis to measure the power of these connections. BXG brings a uniquely powerful measurement platform that allows business to quantify, track and strengthen those connections, so allowing the creation of virtuous circles of sustainable business models, purposeful brand narratives and consumer engagement at scale that will ultimately be good for society, good for consumers, good for business and good for the planet.

We have a very clear purpose in this – in coalition with business and marketing leaders, to make a contribution to solving the environmental and societal problems we collectively face. On behalf of the directors, employees and supporters of BXG and what we do, I therefore commend this manifesto and make this commitment to you. We will do everything in our power to help brands and businesses deliver on this ambition across every product category, every geography and every identifiable group of consumers, globally.

Lawrence Hutter

Chairman, The Brand Experience Group

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1. Executive summary

The world is changing faster than ever, with social and economic dislocation all around us alongside the ever present need to tackle the issues of climate change and environmental degradation. As a result, business leaders now have a unique opportunity to renew the bonds between consumers and brands in a way that addresses these issues, transforms business models and creates value sustainably.

The growing disillusion with Corporate Social Responsibility (CSR) programmes has been accelerated by the pandemic and, more recently, by the BLM movement. Business leaders increasingly recognise the need for their companies and brands to stand for causes beyond just making money, be transparent in their actions and prove that they are having a positive impact on society and the environment. **It's**



about the creation of inherently sustainable and resilient models of shared value and brand capital creation that will endure because they make sense on every dimension: social contribution; environmental

impact; employee engagement; consumer choice and financial outcomes.

More and more leaders are already embracing the new mood and

shifting the focus of their businesses from near-term shareholder returns to long-term purpose, relevance and enterprise value. The manifesto that follows cites inspirational leaders from businesses such as Berkshire Hathaway, Centrica, Generation Investment Management, Mondelēz International, Pernod Ricard, Procter & Gamble, Nestlé and Unilever. These leaders, and more and more besides them, are inspiring society to engage with and consume more authentic and sustainable brands, providing the products the next generation will appreciate and enjoy. It makes good, straightforward business sense and we see growing shareholder expectations for sustainable business practices. The 5-year performance of the Dow Jones Sustainability Group Index, for example, outperformed the Dow Jones Global Index by 36% over the same period. However, building long-term, sustainable enterprise value through brands that are relevant to consumers, support their values and play an



important role in their daily lives requires embedding and measuring the right behaviours throughout an organisation and its broader brand ecosystem of suppliers, partners and advisors. This manifesto* introduces a common, unifying Brand Experience measurement currency that makes this possible by providing the essential line-of-sight needed from consumer engagement with authentic brand narratives to social, environmental and financial outcomes. This is ground-breaking.

The manifesto also champions a change in the role of marketing leadership as a key enabler. Marketing is the voice of brands as the ambassadors of sustainable business. Building brand capital and sustainable enterprise value therefore requires Marketing leadership to be at the heart of the decisions that determine where the finite resources of the business will be allocated. The common, unifying Brand Experience currency is the key enabler of this.

Becoming a truly sustainable enterprise represents, for most, a major transformation so there is no one roadmap or linear path to realising the ambition. There are, however, some guiding principles we have set out in this manifesto: inspirational leadership; clarity of

vision; sustainable business practices; engagement of a broad coalition of internal and external stakeholders through an authentic narrative; establishing management information systems better aligned to long-term value creation; innovating locally and leveraging globally; staying the course in spite of variability of near-term financial results; and building virtuous circles of sustainable business models, purposeful brand narratives and consumer engagement.



What BXG brings to this journey is the critically important measurement of how citizens and consumers experience brands and what they stand for. Through this, we aim to provide the transparency of consumer engagement and value creation potential needed to channel the resources of the global economy into enduring, sustainable business models and ventures.

* Please refer to page 17 for list of contributing authors.

2. Why a manifesto, why now?

Because the world is changing faster than ever, business leaders have a unique opportunity to renew the bonds between consumers and brands in a way that transforms business models, creates value sustainably and makes a major contribution to our social wellbeing and environment.

Building on a decade of progress since the World Economic Forum summit in Davos 2010, we are asking business owners, leaders and marketers to be even more ambitious in adopting new ways of thinking about and measuring how citizens and consumers engage with authentic brand narratives in a way that can literally change the world.

It involves creating line-of-sight from the behaviours that underpin brand promise to consumer engagement with the brand, so linking sustainable and resilient¹ operating models to impact and value creation in a way that is robust and quantified. This has long been the 'holy grail' of sustainability and purposeful brands. That grail is now within our grasp and has the power to stimulate investment and create well-deserved wealth for shareholders, private equity and family-owned businesses.

While the COVID-19 pandemic is currently transforming the pattern of people's day-to-day lives, its most profound medium to long-term impact will be to accelerate key trends that are not new. These include the shift to digital platforms, the search for value driven by recession, increased focus on healthy and sustainable consumption, greater importance placed on the local provenance and traceability of products, and a strengthened sense of citizenship and community². Alongside this, consumers will still demand convenience and want to treat themselves to affordable luxuries. Those basic needs are not going to go away, but they will also expect their preferred brands to be great citizens.

Recent research³ indicates that 65% of CEOs believe that brands will need repositioning to respond to this changing 'new normal' in terms of consumer preferences and needs. More than 70% of CEOs see the need to re-tool their organisations and value-chains, making better use of analytics and data to identify and seize the opportunities that the current crisis presents.

"Businesses were created to solve the problems of society. Lord Lever created bar soap because Victorian Britain needed it, not because of Quarterly Returns".⁴

Paul Polman,
(Former) CEO Unilever

In rising to this challenge, this manifesto encourages business owners and leaders to inspire and energise their organisations to:

- **Embrace the new norms:** Understand the opportunities to engage with shifting consumer mindsets and changed spending patterns globally, market by market and category by category, with more sustainable business models and brands that are relevant to the evolving 'new normal' and how this translates into preference, purchase and pricing power. Reenergise the organisation and engage employees behind this new sense of purpose.
- **Re-establish brand relevance:** Recognise, celebrate and communicate the contribution that each participant in the value chain makes to the brand equity and value created in this 'new normal', characterised by a greater focus on shared value creation, environmental protection, supply chain integrity, robust traceability and security, alongside a strengthened need for affordability for many.
- **Integrate the brand and sustainability agendas:** Create virtuous circles of sustainable brand eco-systems, purposeful brand narratives and consumer engagement that are ultimately good for society, good for consumers, good for business and good for the environment.
- **Establish true line-of-sight from business practice to consumer engagement with brands:** The ability now to establish line-of-sight is what makes it possible to create value sustainably at scale, and hence change the world.



Businesses can now underpin sustainable brands with metrics that provide transparency of consumer engagement with authentic brand narratives and what they represent based on the universal and unifying currencies of brand experience, social contribution, environmental footprint and financial performance. This transparency gives us the opportunity to drive continuous improvement across the markets and communities that comprise brand ecosystems and create shared long-term value. We bring the power of this transparency to life in Section 3 of this Manifesto.

3. Securing a more sustainable future through inspirational leadership

More and more leaders are already embracing the new mood and shifting the focus of their businesses from near-term shareholder returns to long-term purpose, relevance and enterprise value creation. They inspire society to engage with and consume more authentic and sustainable brands, providing the products the next generation will appreciate and enjoy. Moreover, the brands that make their value chains transparent and relevant to these changing consumer mindsets will have the opportunity to make a lasting contribution to our collective future.

The leaders who realize this ambition for their businesses will do so by communicating widely and embedding a number of fundamental core beliefs and behaviours in their leadership teams and organisations. Their narrative will engage a broad range of stakeholders including consumers, employees, shareholders, communities, non-governmental organizations and governments. It requires recognising and acting on a number of things that characterise our 'new normal'.

First, consumer thinking will have been changed by the pandemic and social unrest: Shifting the balance between consumption-centric and citizen-centric mindsets. By how much and for how long, only time and circumstances will determine, though with brands having an opportunity to play a proactive role. Consumers are already engaging more with intrinsic brand values such as sustainability and health versus extrinsic brand values such as lifestyle and imagery. Current events will give a major and lasting boost to this movement. The link from these intrinsic values to consumer engagement with brands can only be established through authentic brand narratives. The narrative must be compelling and well communicated, but the implications are much more profound.

Brands must increasingly have clear purpose and live their narrative in full transparency.



Every stakeholder and participant in the brand value chain has to play their role in our increasingly sustainability, health and security-driven world be they, for example in food, grower, consolidator, packaging supplier, manufacturer or retailer. Brand

owners have to assume that behaviours at every stage of their value chain will be transparent and increasingly open to external scrutiny and certification. Full traceability will be essential and there cannot be any weak links. Testing, refining and living a brand narrative with consumers has, therefore, profound end-to-end value chain implications.

Second, brand behaviours and the narratives through which they are presented to consumers have to be relevant to this new

world: Each brand needs to be a powerful and effective ambassador for every aspect of the organisation and end-to-end value chain which it brand represents, as well as a platform that listens to and learns from what consumers are telling it. Brand owners therefore need to understand, in robust quantitative terms, how the brand narrative is resonating with changing consumer priorities versus competing brands and how that is translating into brand preference, perceived value, sales conversion and sustainable growth. Specifically, brands need transparency of the impact of their authentic narrative with different consumer groups, how effectively that narrative is being activated across different channels and touchpoints, and what actions are required to strengthen the narrative, improve its delivery to citizens and consumers, and take learnings back into brand value chain behaviours.

"The brands that will be big in the future will be those that tap into the social changes that are taking place."⁵

Sir Michael Perry,
Chairman of Centrica PLC

Third, brand-owners therefore require timely and effective ways to measure the impact of sustainable business practices: These have to be articulated through authentic brand narratives that drive actual consumer responses and behaviours. However, there is no point in asking people their opinion about issues such as sustainability – they will just tell you what they think what they should think. **The only reliable way**



to understand true beliefs and commitment to more healthy and sustainable lifestyles is through interrogating and understanding actual behaviours. Only by exploring actual

behaviours can we, for example, get to a robust view of whether consumers are genuinely Activist, Involved, Aware, Resisters or Unaware with respect to the sustainability agenda and issues of security, naturalness and health more broadly. Combined with information about consumer engagement with

relevant brand narratives and touchpoints in a category, this insight can then give brands line-of-sight from consumer/citizen mindsets to engagement with brand narratives, perceptions of value and resulting consumption behaviour.

Fourth, making these links is now possible:

This has the potential to be game-changing for the brands that seize the opportunity. It's about informing the strategic choices and resource allocation decisions that will determine brand relevance, longevity, winners and losers in the 'new normal'. And it doesn't have to be about brands that are inherently healthy, nutritious and socially responsible. Brands in categories such as alcoholic beverages, confectionary, coffee, tobacco, leisure and entertainment can offer powerful brand narratives linked to the transparent and quantifiable environmental, social and economic contributions they make to the communities in which they operate – creating shared value and sustainable eco-systems.

"I need to recognize where consumers want us in ten years...businesses that are only targeting profits will die."⁶

Alexandre Ricard
CEO, Pernod Ricard

Fifth, there is urgency and now is the time to act:

As different markets around the world slowly emerge from the current pandemic and waves of social unrest, the consumer mood will have changed and be changing continuously, with individuals being frustrated, scared, seeking normality and, more than ever before, prioritising citizenship over consumerism, security over indulgence, purity over price and quality over quantity. The challenge for brands is not new, many traditional consumer brands that are part of our daily lives in food, beverage and other categories have been progressively commoditised and eroded over recent years versus new niche brands and more experiential categories of spend.

The experience of the pandemic, and new expectations it may have created in areas such as cleaner air, regular exercise, home cooking and family time, will also likely both accelerate this trend and create opportunities. At the same time, we should not lose sight of the adverse economic impacts of current events for many.

"People are going to want, and be able, to find out about the citizenship of a brand, whether it is doing the right things socially, economically and environmentally."⁷

Mike Clasper,
(Former) President of Business Development
Procter & Gamble (Europe)

Sixth, and finally, this is not a passing moment or an add-on to the way we do business, this is the future:

These principles need therefore to be embedded in vision, values, strategy, operating models and narratives. New behaviours and priorities need to be incentivised and supported by the right capabilities and performance management frameworks. This will increasingly be key to building sustainable and sustained brand capital and enterprise value, recognised by shareholders, asset managers, private equity and family-owned businesses alike. [The 5-year performance of the Dow Jones Sustainability Group Index, for example, outperformed the Dow Jones Global Index by 36% over the same period](#)⁸. Going forward, we believe this divergence of performance will become even stronger. More and more investors are therefore using Environmental, Social & Governance (ESG) measures to assess an organisation's ethical impact and sustainability practices. Integrating the consumer engagement, social, environmental and financial dimensions of brand and enterprise performance management is therefore a prerequisite for optimal, sustained value creation.



4. Building sustainable enterprise value

Building long-term, sustainable enterprise value through brands that are relevant to consumers, support their values and play an important role in their daily lives requires embedding, and hence measuring, the right behaviours throughout an organisation and the broader brand ecosystem of suppliers, partners and advisors. It also requires engaging consumers with these behaviours in a way that has a positive impact on their lives, on all of our lives, on the environment and on the ability to create value through business models that are sustainable for the long-term.

4.1 Beyond 'Triple Bottom Line' thinking



Businesses are becoming more and more conscious that their social and environmental behaviours are fundamental to their reputation, relevance, attractiveness as employers and long-term ability to survive and thrive, providing their 'License to Grow'⁹. Companies are increasingly adopting or ramping up their social and environmental programmes. Consumers want companies to be honest about their practices and considerate of all stakeholders, with every aspect of business and value chain practice being increasingly transparent and discoverable. More and more consumers are willing to pay more for clothing, food and other products if it means that workers are paid a living wage and the environment is being respected in the production process. They have to be confident, though, that such claims are genuine and supportable.

In 1994, John Elkington, the management consultant and sustainability guru, coined the phrase the 'Triple Bottom Line' as his way of measuring corporate performance. The thinking behind this is that a company can be managed in a way that not only generates positive financial returns, but which also improves people's lives and the wellbeing of our planet. The 'Triple Bottom Line' (TBL) is a framework that recommends that companies commit to focus on social and environmental concerns, just as they do on profits. The TBL model suggests that instead of one bottom line, there should be three: profit, people, and the planet, a balanced scorecard that seeks to gauge a corporation's level of commitment to supporting the communities within which it operates and its impact on the environment over time, alongside its financial performance.

According to good TBL practice, companies should therefore be working simultaneously on three bottom lines:

- **Profit:** The traditional measure of corporate profit, the Profit and Loss (P&L) account, with the financial Balance Sheet also being important here.

- **People:** Which measures the social contribution an organization makes throughout its operations, for example to the health and wellbeing of its direct employees, indirect employees and the broader communities in which it operates.
- **Planet:** Which measures how environmentally responsible a firm has been, as measured for example through its carbon footprint, water use and contribution to waste reduction.

The objective is that, by focusing on these three interrelated elements, 'Triple Bottom Line' reporting can support the realisation of a firm's sustainability goals and long-term enterprise value creation. A key challenge of the TBL though, according to Elkington, is the difficulty of measuring the social and environmental bottom lines. Profitability is inherently quantitative, so it is relatively easy to measure. What constitutes good social and environmental practice can, however, be harder to quantify and track, though more and more businesses are establishing proactive, large scale environmental and social programmes with associated KPI frameworks. Some of these have a very important external profile through initiatives such as the Carbon Disclosure Project and associated Water Disclosure Project. Some leading businesses have also made major and explicit public commitments to the social and economic wellbeing of the communities in which they do business, Nestlé's Creating Shared Value (CSV) initiative and Unilever's Sustainable Living Plan (USLP) are two of the most obvious examples at scale.



"Creating Shared Value is fundamental to how we do business at Nestlé. We believe that our company can only be successful in the long term by creating value both for our shareholders and for society"¹⁰

Paul Bulcke,
Chairman Nestlé



While full TBL reporting remains a distant aspiration, TBL thinking is increasingly fundamental to good business practice.

And while the reporting of social and environmental performance remains a separate and parallel activity to core financial reporting, it has increasing importance and is increasingly subject to external verification. Embedding sustainable business practices requires both leadership that believes in the cause and the measurement frameworks that deliver the transparency needed to capture learnings and drive continuous improvement across all three dimensions of the business model – environmental, social and financial. BXG therefore advocates the adoption of such TBL thinking and reporting by businesses, addressing their performance as an enterprise and their contribution to the broader eco-system in which they operate – the CSV model. Some businesses are taking steps on that journey through more strategy-led and stakeholder-led reporting as a path to establishing a more integrated balanced business scorecard. That said, it's not easy and for most there is still a very long way to go.

Also, current TBL thinking still leaves a fundamental gap versus what will be required if sustainable business practices are to become embedded in a way that will truly save our planet. This gap lies in measuring and understanding how to strengthen consumer engagement with brands based on the purpose they stand for and the sustainability of the behaviours they exhibit. While the majority of, for example, UK consumers say that being environmentally friendly is important to them, the majority still cannot name a single environmentally friendly brand¹².



Only when the metrics that are used to track financial, environmental and social performance are combined with the metrics that describe consumer engagement with brands as demonstrated by their behaviours can businesses establish a truly, actionable line-of-sight between sustainable business practices and value creation through brand preference and purchase. Only then can we establish a virtuous circle of brand purpose, consumer engagement and business model transformation towards a more sustainable future.

TBL reporting has struggled to get traction, in part because of non-financial data challenges and its lack of line-of-sight to business outcomes. The adoption of common, unifying Brand Experience metrics can provide an early and important catalyst for change because of the direct line-of-sight they bring from consumer mindsets and brand purpose to financial results.

4.2 Building brand capital

Brand capital is the value placed on a brand, ultimately measured in financial terms by consumers through the price they are willing to pay for the brand and the shareholders who recognise the value that brand will represent over time. Increasingly, that reflects the way individuals value the broader contribution a brand makes through every aspect of its social, environmental and economic performance.

"Taking shortcuts is not the pathway to achieving sustainable competitive advantage, nor is it an avenue toward satisfying customers".¹¹

Warren Buffett

Satisfying customers, building brand capital and, through that, sustained enterprise value therefore requires a number of key foundations to be in place:

- **Brand purpose:** A brand's purpose is essentially a brand's reason for being beyond meeting an immediate consumer need thereby making money. It's important to not confuse this with 'brand promise'. A brand's promise may give the buyer an idea of what to expect from the product or service, but the brand purpose goes way beyond that. A brand's purpose connects with consumers on a more emotional level linked to their values and beliefs. A brand's purpose is about delivering product-led consumer benefits while also striving simultaneously to realize business outcomes and its broader brand purpose to society.
- **Brand behaviours:** The processes of manufacturing, distributing, marketing, selling and using the product have to support the brand purpose, while delivering on the brand promise. This can include a broad range of behaviours such as transparency and traceability that, in the near term, may have positive or negative financial implications but are essential to what the brand stands for. Examples include creating local employment, reducing carbon and water footprints, funding community education and health schemes and a range of other activities

that are relevant and authentic in the context of the brand's promise.

- **Brand value chain:** Moreover, these behaviours need to extend beyond the enterprise to each contributor in the extended brand value chain from 'farm to fork' if the brand's purpose is to be truly transformative.

Again, such programmes need to be authentic and relevant to the brand's promise and business model such as, for foods, investing in sustainable agriculture, developing clean water schemes, improving carbon sequestration etc.

- **Brand ecosystem:** There are no silos, only transparency. The authenticity of brand purpose and behaviours needs to be clear to every individual in the brand eco-system, be they consumer, owner, direct employee, indirect employee, retailer, influencer, advisor or agency. *We should not underestimate the collective impact of an aligned, purpose-led workforce within and beyond the boundaries of the enterprise.*



Authenticity gives 'reason to believe' in the brand purpose and the 'right to win' through relevance

of the brand promise to consumers' values, preferences and needs.

- **Brand impact:** Critical to realising the potential brand capital and transformative impact that all of this can have is the ability to quantify the impact that authentic brand behaviours and narratives have on the engagement and behaviours of consumers, employees, shareholders and other stakeholders in the brand ecosystem, all underpinned by end-to-end



traceability and transparency. *We need to bring objectivity to the way we measure how consumers engage with and experience brands. This has long been the missing link in the chain, but this now changes.*

"(...) new research shows that marketers clearly have a long way to go when it comes to convincing the average consumer to opt for sustainability over convenience. The fact is, they should not have to."¹²

MarketingWeek – Molly Fleming

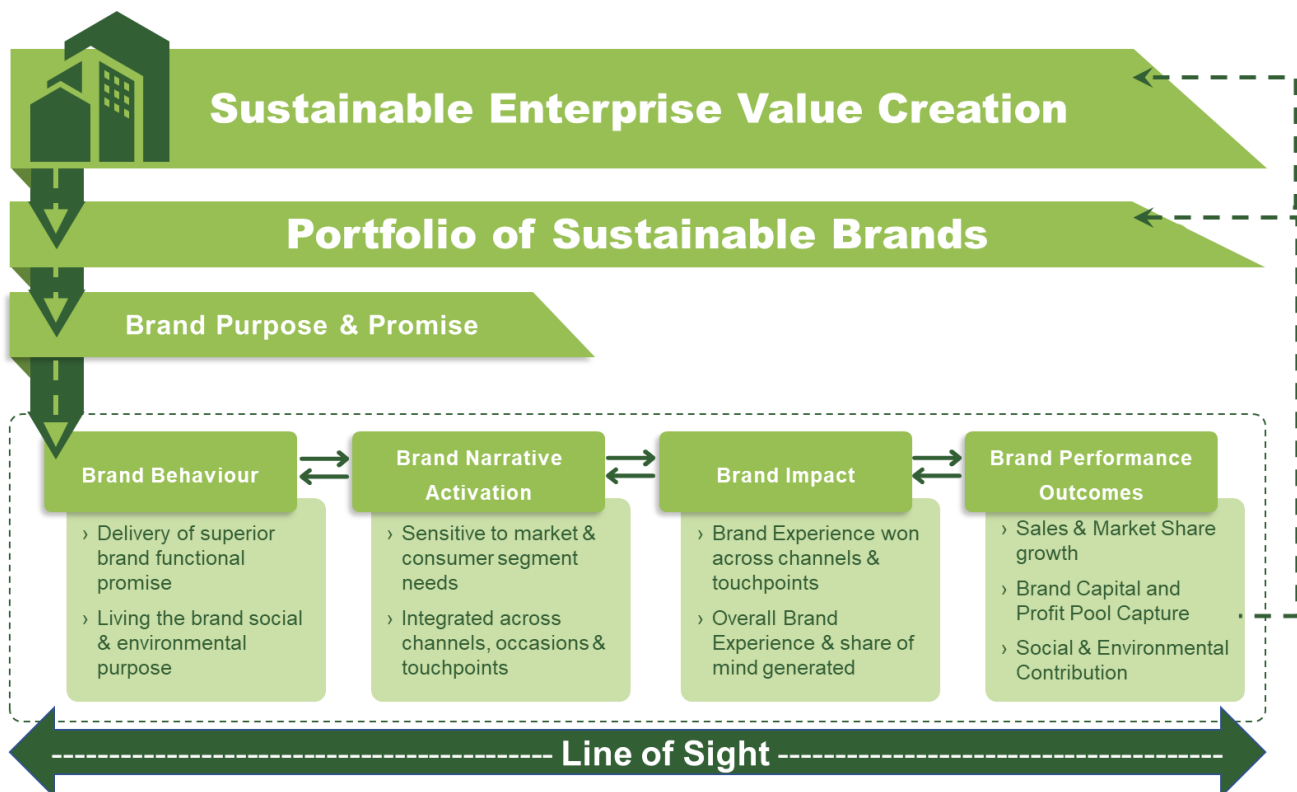


Figure 1: Towards building enterprise value through sustainable brands

4.3 Measuring brand experience

The Brand Experience Group (BXG) is here to help brands that want to have an impact deliver a step-change in the effectiveness and efficiency of their brand building and activation spend, helping to build brand capital by optimizing consumer, employee, shareholder and broader stakeholder engagement with purposeful brands across channels and consumer touchpoints, globally.

BXG has developed a unique Voice of the Consumer (VoC) based Brand Experience methodology, universal 'Brand Experience' currency and analytics platform (powered by the Market ContactAudit® - MCA®) that provides quantitative category, market and brand-specific insights that inform responsible resource allocation and execution decisions and are strong predictors of brand health and market share growth. Rather than the input-based measures such as click-throughs and GRPs that have traditionally been used by marketers, BXG uses true outcome-based MCA® Brand Experience

metrics that correlate strongly with consumer choice and market share movement.

This allows brands to understand how consumers are engaging with authentic brand narratives in a way that anticipates market share and growth results.



Moreover, the MCA® platform allow brands to understand and measure consumer engagement systematically across all channels in our increasingly multi-channel world (digital, mass media, on-line, in-store etc.) with the universal, unifying Brand Experience currency. Linking the digital and physical worlds, this common currency also measures synergies and carry-over effects across touchpoints on the path to preference and purchase. It has been used by almost 200 leading brand owning businesses in sectors such as Automotive, Beverage, Consumer Electronics, Hospitality, Financial Services, Food, Health & Hygiene, Media, Retail and Telecoms, to help build brand capital, drive sustainable growth and optimize demand generation spend effectiveness and efficiency.

The MCA® was originally developed by BXG and applied by leading CPG companies such as Procter & Gamble & The Coca-Cola Company to help optimize overall marketing and broader demand generation spend to drive sales and market share. It informs product and service-based brands about where they are winning and losing in engaging consumers versus competitors, about their performance in marketing communication and about how well this is converting into sales. The foundations are very robust.



Our vision is to have the common, unifying Brand Experience currency be adopted globally as the standard metric that is used to measure the effectiveness of consumer engagement with authentic brand narratives

and, as such, to understand the real impact of brand communications on consumers, business outcomes, society and the environment. By tracking Brand Experience, in combination with the other metrics that measure financial, environmental and social performance, full transparency of sustainable enterprise development becomes possible and practical for the first time.

The universal, unifying Brand Experience currency has existed for 20 years and is now truly coming of age in our rapidly changing multi-channel world, realizing its full potential in giving businesses line-of-sight from consumer engagement with authentic narratives about sustainable brand behaviours to how and what they consume – enriching people's lives and providing the catalyst for value creation through sustainable business operating models and ecosystems.

To fulfil the full potential of effective consumer engagement with purposeful brands and thereby embed sustainable business practices throughout brand value chains there is one more critical building block that has to be in place. We must leverage the common, unifying Brand Experience metric and broader balanced scorecard of 'Quadruple Bottom Line' thinking and metrics to restore the credibility and role of marketing in business leadership.



5. Restoring the role of marketing in business leadership

Marketing is the voice of brands as the ambassadors of sustainable business. Building brand capital and sustainable enterprise value therefore requires Marketing leadership to be at the heart of the resource allocation decisions that determine where the finite resources of the business will be directed to building and activating the products and brands on which the future of the business and its economic, social and environmental roles will be based.

5.1 Appetite for transformation

The opportunity is huge and forward-thinking marketing leaders are already embracing the challenge. They are very aware that it requires them to:

- **Take an holistic business view:** Based on leadership consensus and, in collaboration with the broader leadership team, marketing leaders must lead shaping its brand portfolios, articulating the purpose and promise of each brand in an authentic business context, guiding brand value chain policies and driving the development of brand building and activation strategies that bring the brand promises to life for consumers, employees and all participants in the brand ecosystem.
- **Be equipped with a shared fact-base:** Having line-of-sight from investments in brand building and activation in market to business outcomes in a way that brings objectivity to resource allocation decisions based on **a common, unifying set of social, environmental, brand engagement and financial metrics that have the shared confidence of the CEO, CFO, COO and CMO**, thereby encouraging the organisation to make the tough choices needed to channel its resources behind building winning, purposeful, relevant and economically sustainable brands, in all markets.



However, in many businesses marketing has increasingly been on the back foot in seeking the investments needed to build and defend great, purposeful brands. There are clear reasons for this that need to be addressed and which are even more important in an environment where brands have a central role to play in building new, more relevant, more sustainable businesses and business models.

5.2 A practical challenge to overcome

More and more businesses are using disciplines such as Zero-Based Budgeting (ZBB) to bring stronger discipline to the way the organisation allocates its finite resources. However, many businesses have, year-on-year, reduced their marketing budgets through ZBB driven planning

because the marketers haven't been able to defend their investment plans through demonstrating what works versus what doesn't. Current brand health as measured by 'brand equity' studies shows what consumers think about brands but doesn't provide any line-of-sight that reveals which activities are driving this or how this



translates into consumer preferences and purchase behaviours. **Global and local market-leading brands are also being increasingly and rightfully challenged across categories by new 'local, purpose-driven and authentic' brands** that, enabled by social media, proximity marketing and new business models, are taking share and disrupting global players. Craft beers, sustainable fashion and vapes are just a few examples. There are many others. Global players often respond by acquiring and investing in these smaller brands, as a result often reducing support for their power brands. This makes it even more important to know what works versus what doesn't at the most granular level, brand by brand, market by market¹³.

The challenges around brand health are compounded by the shift of spend to digital activation which, pre-COVID evidence suggests, has often been less effective in brand building, with as much as 50% of marketing spend commonly diverted. We have yet to see how this will play out in the 'new normal'. The combined result is that brand equities erode, both volume and pricing suffer, and the weakened brands become ever more expensive to support in store and on-line, eventually becoming irrelevant to both consumers and retailers. It's a vicious circle that many consumer brands businesses are experiencing, especially those operating in lower



margin categories such as food where the competitive pressure from Private Label alternatives is becoming ever greater. **If you don't know what marketing works versus what doesn't, ZBB can spell death to brands.** This is of course also true for retailer brands. It's particularly prone to eliminating slow-acting but important brand-building investments that don't translate into near-term sales but that, if abandoned, come back to bite later with a vengeance.



This has to change. Brand owners need to understand, in robust quantitative terms, how authentic brand narratives are resonating with changing consumer priorities versus competing brands and how that is translating into brand preference, perceived value, sales conversion and growth. Specifically, brands need transparency of the impact of different parts of their brand narrative with different consumer & citizen groups, how effectively that narrative is being activated across different channels and touchpoints, and what actions are required to strengthen the narrative and improve its delivery to consumers in every market and community. Increasingly, the competitive dynamic now shifts to purpose and authenticity.

5.3 Putting a transformed marketing function at the heart of the sustainable enterprise

This is about business and marketing leaders who want to do the right thing for their organizations, galvanizing the leadership team behind a clear vision and strategy, and tackling outdated ways of working that lack the transparency, objectivity and measurement systems needed to provide a platform for brand building and continuous performance improvement. It's about breaking down silos and tackling fear of the new, embedded ways of working, analysis paralysis and resistance to change. As a key and integral pillar of integrated reporting or the 'Quadruple Bottom Line', it involves leveraging the common, unifying single Brand Experience currency and line-of-sight from consumer mindsets through Brand Experience and business outcomes to establish the transparency, objectivity and measurement of brand performance needed to reinforce marketing credibility with business leadership, thereby releasing the resources needed for marketing leaders, brand teams and their agency partners to deliver effective brand building and activation.

BXG's MCA®-based approach provides, for the first time, a fully cross-channel view of the effectiveness of the brand narrative and every element of demand generation spend, also versus competing brands:

- At a strategic level, the insight it creates brings a new dimension to integrated planning across marketing, sales channels, brands and markets.
- At a tactical level, it is used by market leaders to shape and manage activation plans, typically resulting in large shifts in spend allocation across channels and consumer touchpoints.

Crucially, the category and brand insights the approach brings provides a platform for fast and systematic learning and continuous improvement

that is transformational. The MCA® therefore needs to be embedded in the marketing planning and execution process and repeated to assess the impact on consumers of the changes made and identify best practices that can be replicated across brands and markets.

"We need to create systems that are much more agile – you can predict maybe 1/10 things if you're smart, but the other 9/10 something happens to which you need to react, new competitors, a natural disaster, a new law is passed – things that happen outside your control. And the world is getting more volatile everywhere. What you have to do as a company is to have a quick feedback loop from the market that picks up these signals, and a structure that is very agile and externally focused."¹⁴

Paul Polman,
(Former) CEO Unilever

We do not underestimate the transformational and disruptive change this implies, including the opportunity for both brands and their creative and media agencies to embrace the new transparency, adopt more holistic business thinking and work together to build more purposeful brands.



The universal MCA® Brand Experience currency unites brand owners, their advisors and partners behind consumers' Brand Experience and its translation into preference and purchase as the key indicators. The MCA® Brand Experience

metrics correlate more closely with market share than any other measure such as GRPs or share of voice. In this way, they have the power to transform accountabilities and agency/client relationships based on a shared data set, shared insights and a common language, providing a more robust platform for creative and media agency input to strategy and activation across brand portfolios and markets.

For those who embrace the approach, it will drive longevity of collaborative trusted relationships through better, longer-term planning, KPI tracking and continuous improvement. It will establish a new level of transparency which the best agencies, with confidence in what they do, will embrace fully and see it as a powerful strategic differentiator, while the less confident risk being disrupted. Overall, it will be hugely supportive of the professionalism and reputation of marketing professionals and give the creative industry a new opportunity to play a pivotal role in building a new, better future for businesses and all of us based on relevant, purpose-led and sustainable brands.

6. A charter and roadmap for sustainable value creation

The growing disillusion with Corporate Social Responsibility (CSR) programmes has been accelerated by the pandemic. The reality is that consumers want companies and brands to have a core purpose, be transparent in their actions and prove that they are having a positive impact on society and the environment.

6.1 A call to arms

The new reality for businesses is not about CSR as an overlay of responsibility – giving something back by way of a token in return for a license to squander our precious natural capital. Most business leaders know that the objectives of campaigning organisations such as Extinction



Rebellion and Greenpeace are right, even if they don't like their tactics. **More and more are therefore rejecting the concept of CSR, though well-intentioned, as too little too late**, recognising that only by putting the principles of long-term sustainability at the heart of business value creation and relevance to consumers, and all business stakeholders, can businesses enable us to live more sustainable lifestyles, protect our environment and be relevant for the long-term.

“What we did was not CSR, it was at the operating model level. We moved from projects to an integrated business model and linked it to the success of the brands”¹⁵

Paul Polman,
(Former) CEO Unilever

Visionary business leaders will harness the power of their brands as ambassadors, advocating the virtuous circles of good business practice and consumer engagement that will be pivotal to building sustainable ventures that meet the needs of the current generation while safeguarding our ability to meet the needs of the next. Their vision will extend beyond near-term financial results to long-term value creation and resilience. Their advocacy will create ‘coalitions that believe’ of business leaders, employees, suppliers, shareholders, analysts, lobbyists and ultimately consumers that trust in brands and businesses that do the right thing.



BXG's role in this is to make that possible by realizing the fourth leg of the 'Quadruple Bottom Line', quantifying the way consumers engage with authentic, sustainable brand narratives that bring to life a brand's social, environmental and economic contributions. We want business leaders to be able to articulate their vision for the role of business in creating a more sustainable future in the confidence that it is genuinely within their grasp, and as reflected in consumer preference and purchase.

6.2 Building brand portfolios with purpose

At a strategic level it starts with making the big choices through the planning process. Purpose and vision need to inform strategy that leverages the core capabilities and reputation of the organisation while shifting the allocation of resources to the new priorities: the markets and product categories to focus on; the ways of working that need to change; the value chains that need to be transformed; the non-strategic businesses to be divested; the exciting new businesses to acquire; and the brands to nurture, build and leverage as ambassadors. Over time, the brand portfolio needs to evolve so that each brand lives a clear purpose that is relevant to the wider purpose and strategy of the enterprise.

Once the strategic priorities are clear, then at practical level the brand teams need to ensure that there is clarity around 'where to play', the brand's 'right to win' with consumers versus competing brands, and 'how to win' practically in the market.

The brand purpose and promise therefore need to be clear, the brand narrative needs to be compelling and relevant at each brand touchpoint and consumption occasion, and the business behaviours for which the brand is the authentic ambassador need to be demonstrable and exemplary. This is only possible if the brand teams have full transparency of these behaviours across the social, environmental, brand experience and financial dimensions of the 'Quadruple Bottom Line'.

6.3 Adopting the common, unifying brand experience currency

Financial planning, budgeting and reporting is typically robust in well run businesses, integrating and aggregating monthly financial data across geographies, categories, channels and brands to provide transparency of current and forecast performance across each dimension of the business. For some key KPIs such as sales, reporting is typically weekly or even more granular since they are seen as things that can be acted on in the very short term. Reporting on the social and environmental dimensions of business performance tends to be less frequent, robust or missing.

Even in the most developed businesses with strong sustainability commitments, reporting on local versus aggregated performance versus environmental and social goals is typically quarterly, annual for external purposes. We do not, for example, see reporting on environmental and social performance in many quarterly trading updates. That said, there is progress as more and more organisations hold themselves to account on both of these dimensions. The reporting is challenged by more manual processes of data collection and interpretation, which will also mature.

To add to the shortfall versus the prerequisites for a more sustainable future, global reporting on brand performance tends to be mainly financial, with brand health scorecards at the local level but very little meaningful non-financial brand performance data aggregated for above market reporting. This must change and will change if consumer engagement with purposeful and sustainable brands is to play a pivotal global role in the creation of sustainable business models that will impact all of our lives. The unifying, common Brand Experience currency changes all of this.

The practical and strategic implications of this are huge:

- **First, the common currency allows business to create value hand-in-hand with playing its role in protecting future generations.** It provides business leaders with transparency of how consumers are engaging with purposeful brand narratives across markets, channels and touchpoints globally. This is the power and potential of 'Quadruple Bottom Line' thinking and reporting, making it possible to establish virtuous circles of sustainable business models and consumer engagement.
- **Second, the common currency allows this consumer engagement with purposeful brands to be tracked across markets**

globally. It is a powerful leading indicator of market share movements, for the first-time providing brand leadership with transparency of performance versus competing brands consistently across all markets and in aggregate, providing insights into local performance issues and the ability to react quickly to changes. This is unprecedented, with leading brands beginning to establish such global performance management cockpits.



The business case for adopting these disciplines is compelling at both the strategic and near-term financial levels.

In immediate practical, financial terms, 1-2% of marketing spend invested in using the MCA® platform to better understand what is working well versus not based on true line-of-sight with consumers across markets over time globally typically frees up 20%+ of spend to take to the bottom line or invest behind more effectively driving performance and building sustainable brand capital and market shares. The MCA®-based performance monitoring is embedded, undertaken market by market on a regular basis and feeds local and above market Brand Experience performance tracking.

More strategically, the same regular MCA®-based data provides organisations with transparency of consumer engagement with purposeful, authentic and sustainable brand narratives across markets globally. This provides insight into current and changing consumer engagement performance on the sustainability agenda as well as providing a powerful leading indicator as to how this will translate into future market share movement, informing investment and resource allocation decisions.



It represents a crucial opportunity to create the next generation of Management Information systems that are more aligned with sustainable business models and long-term enterprise value creation.

“Investment managers will be evaluated against three criteria going forward: risk, return and impact. Over the next five years, there will be a greater focus on impact measurement and reporting.”¹⁶

Senior Partner,
Generation Investment Management

6.4 Operating model implications

Building on the transparency that more integrated social, environmental, brand engagement and financial reporting brings, equipping and empowering an organisation to live the vision and values of the sustainable enterprise impacts many aspects of a business's operating model.



Marketing, Sales, Supply Chain Operations, Procurement, Finance, HR and IT leaders need to be aligned behind the vision, strategy and 'Quadruple Bottom Line' metrics, each translating these into their relevant functional

performance management frameworks and individual 'top-to-bottom' goal setting through the integrated business planning and performance management process. Brand planning and activation will have strengthened focus on bringing authentic purpose to life, tracked through Brand Experience.

Supply Chain will be more focused on resilience, environmental and social impact, with these new dimensions brought to established continuous improvement and lean programmes. The rolling 18-month Sales & Operations Planning (S&OP) process will be adapted to consider new criteria of environmental and social impact, alongside existing decision-making considerations with respect to availability and cost. Management information and reporting processes will be adapted to deliver the resulting balanced scorecard of 'Quadruple Bottom Line' metrics.

'Quadruple Bottom Line' metrics will be increasingly pervasive, in each function, across functions, at the enterprise level and for the extended enterprise of value chain contributors, channel partners, advisors and investors. Corporate Affairs and Investor Relations will be increasingly focused on delivering the 'Quadruple Bottom Line' narrative and reporting, with and on behalf of leadership.

"We need to raise the level of ambition. We need to change what people think is possible. This transition will be the most significant change in economic history. The sustainability revolution, coupled with the technology revolution, will be deeper and more far-reaching than the industrial revolution and will unfold faster than the digital revolution."¹⁷

Senior Partner
Generation Investment Management

6.5 Ecosystem opportunities¹⁸

Taking the principles of sustainable ventures to the heart of a major business requires vision, strategy, planning and excellence in execution. It also requires product and value-chain innovation, with most major enterprises being less adept at this than small, nimbler purpose-led start-ups.

The good news is that we live in a time of rampant innovation and resulting disruption, with more and more of that innovation motivated by sustainable purpose and funded by ethical capital. Connecting such innovation to major enterprises that can leverage, package and take it to consumers globally can be a powerful accelerator in the pursuit of sustainable business operating models at scale.

Enlightened leaders typically recognise the need to reach out beyond the boundaries of their organisations to find and encourage sources of innovation that can contribute to a sustainable future and the long-term relevance of their business and their brands. This is likely to have a number of different components such as:

ECOSYSTEM OPPORTUNITIES

- **Establishing a venture fund/incubator:** Providing capital to incubate and develop innovation that has the potential to be transformative
- **Using the MCA®-based radar to spot emerging brands:** Using in-market Brand Experience spikes to identify potential disruptors at an early stage to learn from or acquire
- **Identifying local jewels that could become global assets:** Assessing the potential to translate local resonance of brand purpose and promise into something that might work across markets
- **Recognising the need to acquire and nurture, not smother:** Recognising that the full weight of the 'Quadruple Bottom Line' could smother small, innovative, agile and purposeful brands.

So, we now have all of the building blocks. The remaining question is: how can we translate this into a practical roadmap for sustainable value creation and virtuous circles of consumer engagement and enlightened business decision making?

6.6 A roadmap for sustainable value creation

Every business is at a different point on this journey so there is no one roadmap or linear path to establishing a truly sustainable enterprise. There are, however, some guiding principles we can point to as set out in this manifesto:

GUIDING PRINCIPLES FOR SUSTAINABLE VALUE CREATION

- Inspirational leadership
- Clarity of vision
- Sustainable business practices
- Engagement of a broad coalition of internal and external stakeholders through an authentic narrative
- Embracing 'Quadruple Bottom Line' thinking and establishing management information systems aligned to long-term value creation
- Encouraging local innovation within and beyond the enterprise and leveraging everywhere
- Staying the course in spite of variability of near-term financial results
- Building virtuous circles of sustainable business models, authentic brand narratives and consumer engagement.



Perhaps most importantly of all, it's not about CSR, **it's about the creation of inherently sustainable and resilient models of shared value and brand capital creation that will endure because they make sense on every dimension:** social contribution across communities; environmental impact locally and globally; employee engagement; consumer preference and choice; and hence economic impact and value creation.

It's the latter, and the financial capacity that it creates to innovate and reinvest guided by the principles of purpose, consumer choice and sustainable business, that can ultimately save our planet and enable inspirational leaders who believe to have a transformational impact.

That's dependent on businesses moving fast enough to adopt the principles set out here, in spite of the challenges that will inevitably be encountered. Governments, regulators and tax authorities have a role to play in creating level and positive playing fields for responsible business but, ultimately, we need to look to business and inspirational business leadership to make possible the changes we need to secure our collective future.



Figure 2: A Roadmap for Sustainable Value Creation

7. BXG - our belief and commitment

Governments and regulators can contribute to creating an environment in which responsible businesses and sustainable brands can thrive, and we encourage them to do so. We will see increasing pressure placed on politicians by consumers, lobbyists, business leaders and leading industry associations to make this real. However, ultimately it will be the ideas, values and consumer connections with authentic brands as ambassadors for sustainable business behaviours that will shape our collective future.

The 'table stakes' for sustainability leadership are rising¹⁹. A good indication is the accelerating pace of corporate commitments to 100% renewable energy (through the group RE100), setting science-based targets (more than 740 companies now), and pursuing aggressive carbon reductions in order to hold global warming to 1.5 degrees Celsius. The Carbon Disclosure Project (CDP) now has more than eight thousand participating businesses globally.

BXG's commitment is to do everything in our power to help brands and businesses deliver on this. We will provide objective, robust insight into how consumers are engaging with responsible brands and how this translates into preference, choice and consumption behaviours, making real the 'Quadruple Bottom Line' of social, environmental, consumer engagement and resulting financial impact. We will support responsible businesses in realising this ambition across every product category, every geography and every identifiable group of consumers globally.



Through this, our aim is to provide the transparency of consumer engagement and value creation potential needed to channel the resources of the global economy into enduring, sustainable ventures that provide the products and services needed to "meet the needs of the present without compromising the ability of future generations to meet their own needs."²⁰

"To build and sustain brands people love and trust, one must focus not only on today but also on tomorrow. It's not easy...but balancing the short and long term is key to delivering sustainable, profitable growth-growth that is good for our shareholders but also good for our consumers, our employees, our business partners, the communities where we live and work, and the planet we inhabit."²⁰

Irene Rosenfeld
(Former) Chairman & CEO
Mondelēz International



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Contributing authors



LinkedIn

Lawrence Hutter | **Chairman**

Lawrence brings more than 35 years' experience of working with some of the world's best-known consumer-facing businesses on a range of strategic business performance improvement initiatives across retail, food, beverage, tobacco, electronics, durables, publishing and travel. He started his career with Andersen Consulting, then set-up and built his own consumer products & retail advisory firm which was eventually acquired by Deloitte. He led Deloitte's global Consumer Business practice for almost a decade and, around 7 years ago, was asked to start Alvarez & Marsal's (A&M's) now thriving Corporate Transformation practice in Europe. Lawrence also spent 3 years leading the World Economic Forum's sustainability programme for the retail and consumer industries, working in close partnership with three global 'champion' companies (Nestlé, Nike and Unilever), and 21 other top-tier global consumer products companies and retailers. He introduced the MCA methodology and analytics engine to A&M as a platform for improving clients' demand generation spend productivity and transforming their commercial operating models. On stepping down from his full-time A&M role, Lawrence accepted the invitation to become Chairman of BXG - The Brand Experience Group. Lawrence earned a first-class honours degree in chemistry from Balliol College, Oxford.

lhutter@brandexperience-group.com

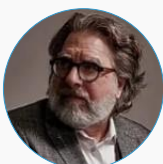


LinkedIn

Oscar Jamhuri | **Founder & Chief Executive Officer**

Oscar is the Founder & Chief Executive Officer of the Group. His 15-year tenure at BBDO led to develop an understanding of the role of brands as meta-salesforces and global ambassadors of an enterprise mission & values. It was his personal commitment to delivering more effective, efficient and accountable marketing that resulted in the founding of the BXG Group 25 years ago. With a multi-disciplinary team of experts, Oscar leads the development and deployment of metrics, tools and systems to measure and operationalize the managing of brand experience as an engine of growth and purpose on a global basis. He is a regular guest speaker in the field of Brand Experience and holds degrees in French Literature, psychology and advertising from Sorbonne University.

ojamhuri@brandexperience-group.com



LinkedIn

Will Sarni | **Senior Advisor**

Will is an internationally recognized thought leader on sustainability & water strategy. He has been an advisor to multinationals, investors, technology companies & NGOs for his entire career. He founded DOMANI, a sustainability strategy firm over 20 years ago which was acquired by Deloitte. While at Deloitte, he founded & led the water strategy practice within the Social Impact service line, working with some of the world's most recognized consumer & industrial brands. Will has written numerous books & articles & presents on subjects such as the value of water, innovations in digital water technology, the circular economy and the energy-water-food nexus. He is the Chairman of the Scientific Advisory Committee for the UN-sponsored World Association of Industrial & Technological Research Organization's Global Innovation Summit 2020. He is also a member of several company and non-profit boards, was a member of the Scientific Programme Committee for Stockholm World Water Week and is a member of the Editorial Board of the Journal of Water Security.

wsarni@brandexperience-group.com

For more information, please contact:

EMEA

Mike Bambrick - mbambrick@brandexperience-group.com

North America

Will Sarni - wsarni@brandexperience-group.com

Latin America

Eric Dherte - edherte@brandexperience-group.com

India & subcontinent

Sumit Arora - sarora@brandexperience-group.com

Asia Pacific

James Ng - jng@brandexperience-group.com

