Marketing2030

Phase Three MLL Briefing

Marketing’s Contribution to Enterprise Growth Architecture 2.0

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Institute for Real Growth (IRG)

This Marketing2030 Leadership Lab Briefing document is to inform, provoke discussion, and structure the conversation among the St. Paul de Vence Marketing2030 Leadership Lab members. It focuses on the role Marketing plays in the Enterprise Growth Architecture 2.0.

Executive Summary

Marketing2030 has tracked, across three phases, how growth is being remade in an era of artificial intelligence, geopolitical fragmentation, and shifting stakeholder expectations. Phase One mapped the world around us and surfaced the Growth Paradoxes. Phase Two examined how companies must respond and named the new operating model the strongest organizations are building: Enterprise Growth Architecture 2.0 (EGA 2.0). Phase Three turns to the question that naturally follows from both - not what is changing or what companies must become, but **how Marketing helps the enterprise get there**.

The starting point is a single, sobering M2030 online survey finding that holds across every company type, geography, and growth segment. Across functions - marketers and non-marketers alike - more than eight in ten senior leaders say Marketing has the potential to create more value for the business (82%). Yet only around one in five say the value Marketing actually creates is fully captured and understood (21%), the lowest-scoring item in the entire survey. Marketing's ambition and the reality are badly out of sync, and even Marketing's colleagues agree the gap is real. This is an industry- wide condition, not a winners-versus-losers story, which makes it an opportunity rather than an indictment.

The productive response is to look at the parts of Enterprise Growth Architecture 2.0 that the enterprise is already trying to build and show where Marketing can help deliver them. Phase Three identifies **five areas where Marketing's contribution is greatest**: helping the company keep a clear window on the world; championing humanity as AI industrializes execution; anchoring a brand-led vision and strategic core; connecting growth across functions; and developing, nurturing, and measuring the intangibles that increasingly carry enterprise value. None of these displaces Marketing's core job of driving demand and growth. Each is additive - building Marketing's credibility and extending its influence across the C-suite while it continues to do what it does best.

Read together, the five areas describe a single outcome. When Marketing helps the company understand, engage, and represent the people it serves - customers, colleagues, communities, and capital - growth becomes more deeply connected to human value creation rather than shareholder returns alone. That is what the Institute for Real Growth calls **Humanized Growth**: not a separate strategy or metric, but the result the enterprise gets when the architecture is well built, and Marketing plays its part across all five areas.

This MLL Briefing Pack is intended as input for the discussion, not as a final position. The leadership and personal dimensions of this work - the work to develop a deepened Da Vinci Growth CMO profile and the outcomes of the M2030 leadership workstreams - are addressed in a companion bundle and pointed to here only as a forward signpost. The assessment and capability-building tools follow in Phase Four, ahead of the global launch at the Global M2030 CMO Summit on October 6-8 in Istanbul.

How to use this pack

Each of the five areas follows the same structure: the enterprise- level challenge, the Marketing2030 reframe, the interim survey evidence, anonymized patterns from the field, practical next steps, and a short set of discussion questions. The numbers are interim and meant to provoke; the examples are deliberately anonymized, so the conversation stays on the substance, not the brand. In the final report and presentations, we will use approved quotes and examples as in Phases One and Two.

Background: M2030 Phase 1 & Phase 2 Findings

M2030 Phase One explored the major political, economic, technological, and societal shifts reshaping business and stakeholder expectations. Out of that work came the M2030 Growth Paradoxes - the competing demands that organizations, brands, and leaders must navigate to grow sustainably in a volatile, polarized world. These are not either/or choices; they are tensions to be balanced in ways that create value for all stakeholders.

The first paradox pits **short- term against long- term value** - delivering today while building for the long term - a tension sharpened by an AI- driven environment where game- changing decisions are now made in days. The second weighs **globalization against localization**; the third balances **agility against stability**; the fourth concerns **human and machine** - harnessing AI's scale while protecting the judgment, creativity, and trust machines cannot replicate; the fifth joins **hyper- personalization and privacy**; and the sixth combines **digital reach and genuine human connection**.

M2030 Phase Two examined how businesses are responding and what Boards, CEOs, and the wider C-suite now expect from Marketing. It found organizations facing three interconnected challenges: growing **fragmentation** across markets, societies, and stakeholder groups; a widening **trust deficit**, in which trust is becoming a critical business asset; and Marketing's own **identity crisis**, driven by unclear expectations, inconsistent role definitions, and measurement systems that undervalue its contribution to enterprise growth.

In response, Phase Two established the need for a new operating model - **Enterprise Growth Architecture 2.0** - to balance AI- driven efficiency with human- centered value creation, trust, and long-term growth. It highlighted the rising importance of the **Human Quotient** and applying a **Marketing Mindset** as sources of competitive advantage. It identified a significant opportunity for Marketing to serve as a broader growth partner for the enterprise. Phase Two moved the conversation from understanding *what is changing* to defining *what businesses and Marketing must become*. Phase Three asks how Marketing helps make it real.

How Phase Three was built

Phase Three was designed to move from principle to practice, and three things set it apart from the earlier phases. First, the thinking was developed and pressure- tested directly with senior Marketing industry leaders through the Marketing2030 Leadership

Lab, rather than presented after the fact. Second, for the first time, the work is backed by **quantitative evidence** - an in- market survey of senior leaders across General Management, Marketing, and Consumer Insights, fielded with 250+ responses to date and still growing. Because the sample is senior and the survey continues, the figures here are best read as **interim and directional** - they point and provoke; they are not yet the final word. Third, a set of **leadership workstreams** ran alongside the functional research, digging deeper into the personal leadership and human dimensions of the Phase Two themes; those feed the companion bundle rather than this pack.

The functional findings are read against two further evidence bases: an extensive CMO interview program and a synthesis of more than 6,000 leadership conversations across CMOs, CEOs, CFOs, HR, and other business leaders.

Marketing's role in Enterprise Growth Architecture 2.0

Phase Two found that winning organizations in the AI era are rebuilding their growth architecture. Enterprise Growth Architecture 2.0 is contextual and bespoke to each business; there is no universal template. What travels between organizations is the **structural logic, not the structure itself** - an enterprise-wide priority owned collectively by the CEO, CFO, CHRO, CMO, CTO, and Board, rather than delegated to any single function.

That reading is reinforced from a separate, largely qualitative base. Across thousands of leadership conversations, the five areas below emerge as cross-stakeholder themes that the wider C-suite converges on independently, not a Marketing wish-list. Trust is named as foundational by five of six stakeholder groups; the human premium by all six; cross-functional, anti-silo design by all six; strategy anchored to a clear north star; and outside-in, customer-experience thinking throughout. **Phase Three asks the next question: how does Marketing help the enterprise build this architecture?**

Marketing Today

Before turning to contributions, one finding deserves to stand on its own because it is the most painful signal in the dataset and holds across every company type, geography, and growth segment. There is a significant mismatch between what Marketing - and other C-Suite leaders believe it could be doing and what is actually happening.

There is no lack of ambition, that much is clear. More than eight in ten leaders say Marketing has the potential to create more value for the business (82%). The reality, on the dimensions that matter, is a lot more sobering. Only about half say the leadership team understands how Marketing contributes to growth (50%); under half say Marketing is regarded as a strategic business partner (47%); and **only one in five say the value Marketing creates is fully captured and understood (21%)** - the lowest-scoring item in the section, and barely different whether the respondent works in Marketing or not.

Other sources corroborate this SAY-DO mismatch from the other side. The synthesis of thousands of podcast leadership conversations describes a self-reinforcing cycle: Marketing is under- resourced because it cannot demonstrate value, cannot demonstrate value because it is not strategically aligned, and is not aligned because it is set up with unrealistic expectations and short- term pressure, which produces tactical scrambling, reinforces the cost- center perception, and drives further under- resourcing. The central conclusion is that this is a **design gap, not a capability gap**: Marketing is structurally positioned, through reporting lines, budgets, measurement, and hiring, to deliver under-.

The key point is that this is an industry-wide condition, not a winners-versus-losers story - even non-marketers agree the value is not captured. Phase Two said that winning organizations have a Marketing mindset; Phase Three finds that, across the industry, Marketing's ambition is out of sync with how the rest of the business sees the function. The productive response is to look at the areas the enterprise is already trying to build and show where Marketing can help deliver them.

Marketing's contribution to EGA 2.0 - five key areas

The five areas below describe where Marketing can step up and add most value – where Marketing's distinctive contribution is greatest. Each of these five pairs the enterprise-level challenge with the Marketing2030 reframe, the survey evidence, the patterns from the M2030 interviews, and suggests some practical next steps a Marketing leader can take. None of the five replaces Marketing's core job of driving demand and growth; together, they enable Marketing to earn a bigger role in the enterprise growth architecture while continuing to do its core job.

1. Window on the World

Stakeholder sensing, bringing the outside in

Most enterprises understand their stakeholders through a divided map: one function owns the customer, another owns the colleague, another owns the community, and another owns capital markets/investors. Each holds a partial, inward-facing picture. Yet the four groups no longer behave as separate audiences - the same person can be, in different moments, customer, employee, citizen, and investor - and a divided map cannot see the crossings. The window has widened, too: geopolitical shocks, AI capability leaps, trust deficits, climate volatility, and shifting trade regimes now appear in the same field of vision as coupled systems rather than independent buckets. Geopolitics has become an input to brand strategy, not an externality.

The pressure shows in the M2030 survey findings 68% of senior leaders say new technology, including AI, is fundamentally challenging their business and operating model, and 60% say the same of shifting customer expectations. Yet **only 29% rate their company's ability to assess and understand market developments highly** - to spot emerging trends, keep a finger on the pulse of change, and stay aware of competitor moves. The world is moving, most organizations feel it, and few are confident they can read it.

Three failure modes recur, none of which are solved by more data. Organizations *don't see* emerging signals because they fall outside the categories the business is built to scan; they *don't believe* them because the organizational immune system treats outside- in insight as threatening; or they *act too late* because holding the future is cognitively expensive. The decisive capability is not collecting more data but building the organizational ability to detect, interpret, and act on complex external signals before competitors do - grounding decisions in direct learning from customers, frontline employees, partners, and real operating conditions.

This outside-in mandate runs through our interview findings. CMOs describe turning strategy on its head - starting not from "how do we get our products to market," but from "how do we help you solve your problems," and letting the buyer's journey, rather than the org chart, dictate where AI is applied. Several warn that businesses have become too inward-looking, and that the brand is no longer the main character in the room. The wider C-suite echoes the mandate: CFOs treat customer experience as existential, while CEOs insist that customer-centricity be rooted in data rather than executive preference, which they call a poor proxy for what customers actually want. Leaders also note that discovery itself is migrating outside the firm, as customers increasingly find brands through AI tools - further widening the window.

The survey makes the payoff visible. Only four in ten leaders say their organization genuinely understands the underlying needs of all its stakeholders (40%), and just over a third say they have a clearly defined strategy across stakeholder groups (36%). So, there is ample room to grow. And the strongest performers are markedly more likely than the weakest to name new technology and AI as a live challenge they are orienting toward (71% versus 39%), pointing forward to the forces they can shape rather than away from them.

> **The Marketing2030 reframe.** Marketing helps the company keep a clear window on the world - assembling the outside-in truth, the enterprise needs, making it credible in the room, and bringing it to the decision in time. Its irreducible help is translating consumer truth into strategic direction - the bridge between observed behavior and underlying need, where the most commercially valuable insight lives. Marketing brings a wider stakeholder lens than any other commercial function, well placed to see the crossings between customer, employee, citizen, and investor signals. Two of its concepts sharpen the point: the *1 a.m. consumer* - the private, truthful self rather than the public persona - and *strategic latency*. This growth lies in the gap between what consumers publicly state and what they privately desire. There is already a foothold to build on: today, Marketing meaningfully shapes how just over half of organizations understand market developments (55%).

Two field examples show the capability institutionalized. One global consumer-goods company requires its senior marketers to spend roughly thirty hours a year in direct consumer immersion - living with consumers in their homes and meeting them where they socialize - so that outside- in understanding is a habit, not an occasional study. One global hospitality platform runs standing advisory boards for different stakeholder groups that inform real- time decisions on safety, pricing, and product, rather than relying on periodic surveys. In another, a board now scores every stakeholder group up, neutral, or down on a standing decision matrix, so the outside world is structurally present in the room. And a cluster of organizations - a luxury group, a telco, a personal-care business - have stood up next- generation and challenger advisory boards, even deliberately seating people they disagree with, so the signals they would otherwise miss get heard.

Practical next steps.

- Help install one shared, outside-in sensing capability rather than four or more separate listening posts to cover customer, employee, community, and capital signals together.
- Invest in peripheral sensing at the edges of the ecosystem - regulatory, geopolitical, technological - not only the established category.
- Offer a standing mechanism to convene a shared outside- in view, naming the three failure modes - don't see it, don't believe it, act too late - explicitly.

Questions for discussion

- *Does our enterprise have a single 360-degree view of the stakeholder system that the C-suite collectively uses, or four good, function-specific views with no synthesis?*
- *Who in our enterprise is accountable for assembling an external view, in line with all our stakeholders, and does the C-Suite actually use it?*
- *Where are we most likely to be surprised by the outside world in the next twelve months, and what would it take to see it sooner?*
- *If only 29% of leaders rate their organization's ability to read the market highly, where does ours honestly sit - and what is the one signal we keep missing?*

2. Championing Humanity

Balancing AI with the Human Quotient, and creating the psychological safety for human capabilities to thrive

The dual logic of EGA 2.0 is often misread as a sequencing instruction - automate first, add humanity when convenient. The evidence points the other way: as AI industrializes execution, the capabilities it cannot replicate - empathy, judgment, creativity, and contextual understanding - become more valuable, not less. Agentic AI is set to mediate trillions of dollars in consumer commerce by the end of the decade. As a large share of content becomes synthetic, consumers are already willing to pay a meaningful premium for products and experiences that are recognizably human-made. Efficiency does not, on its own, create demand, build brands, or unlock new growth - the Human Quotient does.

That human premium has a cost-and-risk counterpart within the organization. Productivity rises as people adopt one to three AI tools, then falls; those who tip into cognitive overload report markedly more decision fatigue, more major errors, and a higher intent to quit - and the function reporting the most of this overload is Marketing, the canary in the coalmine for the rest of the enterprise. Navigating this depends on a culture with a healthy approach to risk: one that addresses the fear of failure and lets teams fail often to grow faster. Psychological safety is the precondition that makes such a culture possible - it is, on the evidence, the single strongest predictor of team performance - but it is the enabler, not the headline. The point is not comfort; safety and high standards are not opposites. Being safe to speak up and committed to excellence is precisely where high performance lives.

The interviews translate this into working language. CMOs describe humans as the adults in the room - you cannot code trust or ethics - and the discipline of building deliberate pauses for human decisions inside automated journeys. Roles are shifting from doers to editors and orchestrators who blend AI fluency with human creativity and judgment. On safety specifically, interviewees rank it above resources, time, and capability as a predictor of performance, and describe the leader's job as providing air cover - taking the risk so the team can experiment without fear. One study found that safety and high standards are not opposites: being "safe to speak up" and committed to excellence is precisely where high performance lives.

There is also a credibility point unique to Marketing: it was the first discipline reshaped by AI, which makes marketers the front-line others learn from, and gives Marketing standing to help the enterprise strike the human–AI balance.

The survey points in the same direction. Around four in ten leaders say their business explicitly values uniquely human capabilities such as empathy, judgment, creativity and storytelling (41%); a similar share say they intentionally make space for human judgment and intuition in decision- making (39%); and **only about a third say their organization creates space for experimentation without fear of negative consequences (34%)** - a direct read on psychological safety, and a clear opportunity.

> **The Marketing2030 reframe.** The shift is from "how much to automate" to "where AI adds the most value and amplifies the Human Quotient." As the enterprise's AI front line

> - highest exposure to overload, clearest line of sight to the human premium - Marketing helps the company operationalize the balance in practice: mapping which work is AI-led, which is human-led, and which is human-only by design; automating the back end so the front end can be re- humanized; and protecting space for the unoptimized creative origination AI cannot do.

The field shows the balance held in different ways. One global consumer-health company built a joint Marketing-technology platform now used by roughly seventy per cent of its marketers, with AI running the insight engine and human judgment holding the concept: a blank sheet reaches a test-ready concept in under an hour, and concepts test "green" first time far more often than human-only work - a two-to-threefold improvement - with the marketer firmly in the creative seat. One food company's internal AI assistant accelerates execution and productivity while strategic direction, consumer trust, and brand stewardship stay human-led. One brand serving older customers deliberately limits AI-mediated contact because the relationship rests on trust and personal understanding. And a large digital- media company sustains fast innovation through a culture of high autonomy paired with high accountability - the psychological ownership that lets teams move quickly without fear.

Practical next steps.

- Help define a clear Marketing-wide vision for AI, mapping work against the two engines: AI-led with human oversight (back- end production, optimization, attribution, content variation, media planning); human-led with AI assistance (strategy, brand- world authorship, creative origination, taste); and human- only by design (trust- bearing moments where AI mediation would damage the relationship).
- Help install a "try, learn, retire" discipline so that failed pilots are treated as learning opportunities rather than career risks.
- Monitor cognitive load with people analytics that surface mental fatigue, which engagement surveys largely miss.
- With the CEO, CFO, and CHRO, help reframe KPIs to measure cognitive load, not just productivity - and give the headcount, time, and coverage to use the tools effectively.

Questions for discussion

- *When our marketers finish a typical day, are they more energized or more depleted than two years ago - and what is the AI architecture doing to cause it?*

- *Where would protecting a deliberately human moment create more value than automating it?*
- *Only about a third of organizations say people can experiment without fear of negative consequences. Is ours one of them, and how would our team answer if asked anonymously?*

3. Corporate Vision, Strategic Core, Meaning, and Purpose

Brand- led vision, strategic clarity, and meaning

Business has moved from a relatively stable world, where a fixed-rail strategy worked, to one of dynamic uncertainty that demands a *sail* - the capacity to hold a course while constantly trimming. The implication was named decades ago: one cannot manage change; one can only stay ahead of it. Stability and agility are not opposites, but mutually constitutive - stability is the anchor, agility is the responsiveness, and neither works without the other. This resolves the centralized-versus-decentralized binary into what we call *stagility*: centralized for stability, governance, data, and shared AI capability; decentralized for speed, local adaptation, and human judgment. At the leadership level, it shows up as alignment, autonomy, and accountability - and as evolution over transformation, continuous adaptation rather than episodic, traumatic change.

Meaning matters more in this environment, not less. When disruption is constant, the question "why am I doing this?" gets louder, and organizational purpose - the corporate equivalent of brand purpose - becomes both a retention asset and a strategic compass. The strongest leaders communicate a clear purpose, embody the organization's values, and project calm and focus through anxious times.

The interviews capture the stable core that licenses agility. CMOs insist you cannot have stability without agility, or agility without stability, and that without an anchor, the organization loses its reference points. They argue for pivots, not pendulums - navigating change without exhausting the organization through constant reorganization - and for becoming comfortable with ambiguity, treating agility as baseline survival. On meaning, several diagnose a crisis of trust and meaning, argue that successful brands help people navigate their lives, and warn against performative virtue-signaling - meaning holds only when actions authentically align with stated values. The wider C-suite adds the construct of bold multi- year bets executed in short sprints - an external echo of the short/long- term paradox - alongside an explicit warning against optimizing only the measurable parts of Marketing.

This is where some of the survey's sharpest signals sit. The strongest performers are dramatically more likely than the weakest to say their organization can respond quickly to market changes (46% versus 10%) and is organized effectively to capture new sources of growth (34% versus 5%). They are also far more likely to say their strategy defines both short- and long- term targets (62% versus 32%) - the strategic core point in numbers. And on meaning specifically, while most leaders are clear on the impact they make personally (86%) and at a business level (81%), **only 47% are clear on the impact they make at a societal level** - the dimension that most separates the strongest performers from the weakest (58% versus 24%). Purpose, in the strongest organizations, guides strategic decision- making far more often than in the weakest - roughly seven in ten versus under one in ten.

> **The Marketing2030 reframe.** Marketing helps the company hold the brand as its stable strategic core. A strong brand is what licenses agile, decentralized activation, because it carries the coherence the edge can flex against without losing identity: without a strong core, decentralization becomes drift; with it, agility becomes coordinated experimentation. Marketing is also well placed to help the organization author the meaning it needs to navigate ambiguity - the stakeholder- management discipline turned inward. The role is not to write a purpose statement; it is to help the organization discover, express, operationalize, and earn its purpose through customer value creation, growth decisions, stakeholder relationships, and trust.

The field makes stagility concrete. One global consumer brand has deliberately rebalanced central versus in-market resourcing from roughly 55/45 to 30/70, while centralizing heavy data, AI, and brand- platform capabilities - stagility expressed as an explicit ratio that is revisited as conditions change. Another runs separate squads for piloting and for scaling the winners, on the logic that two teams with total clarity outperform one trying to hold both. A complementary pattern keeps people in a fixed home department for security while they deliver daily value through agile, interdisciplinary projects.

Practical next steps.

- Help build the stable brand core and the decentralized activation model that lets resources move without losing identity.
- Help the organization discover and operationalize its purpose through real growth and stakeholder decisions - not a statement, but a working compass.
- Protect the long arc: bring a societal- impact lens into strategic framing, the dimension where confidence is currently lowest.

Questions for discussion

- *What is the stable core our agility flexes against - and could every leader in the room name it the same way?*
- *When the market moved unexpectedly in the last twelve months, how long did it take to reorganize resources behind the new opportunity? If more than a quarter, the issue is structural, not attitudinal?*
- *Only 47% of leaders are clear on the societal impact they make, the dimension that most separates the strongest performers. Where does ours sit, and why?*
- *Where are we running pendulums - exhausting the organization with repeated reorganizations - when we should be running pivots?*

4. Cross-functional Growth Connector

Marketing is the connective tissue across functions.

Cross-functional integration is the most universally endorsed and least consistently delivered structural priority - advocated everywhere, implemented inconsistently. Its importance is rising, and functional silos remain the primary barrier; each function defines de- siloing differently, which makes forcing them together like getting different animals to sit around the same table. The durable mechanism is the skills- based organization - treating capability, not the org chart, as the unit of deployment, letting talent flow to the growth opportunity rather than waiting for the next restructure. AI sharpens the case: machine-learning systems automatically optimize across channels and functions and do not respect the boundaries between the email team, the app team, and the store, so the enterprise has no choice but to braid the silos.

The interviews describe how that braiding works. The move that makes it succeed is to organize around the full consumer journey rather than frozen touchpoints - assembling cross- functional experts into squads that form around a problem and disband once it is solved, grouping advertising, brand, and product into self- managing units centered on peer learning, and running plans as guided projects. Marketing sits in a tight triangle with sales and operations, and success depends on cooperation with other functions, technology, and investment - an enterprise mindset rather than a functional one. Because machine learning does not respect the boundaries between teams, firms must embed AI expertise within cross-functional teams rather than in IT, connect the islands of information, and treat the connector role as a generalist one.

The survey bears out both Marketing's connective potential and the size of the gap. Just over half of leaders say Marketing collaborates effectively across functions (53%), and Marketing is meaningfully involved in shaping overall business strategy (47%) and corporate purpose (48%) in around half of organizations - real influence, with clear headroom. At the same time, the function's center of gravity holds: its single highest-influence area in the entire dataset is brand strategy itself (84%). The starkest signal sits at the enterprise level. However, **only 20% of organizations say they are organized effectively to capture new sources of growth**, and the gap between the strongest and weakest performers here is one of the widest in the study (34% versus 5%). The connective tissue is largely missing - an opportunity for Marketing to step up.

> **The Marketing2030 reframe.** Marketing's support role here has two faces. The first is a much stronger Marketing-Finance partnership - the deepest enabler of strategic credibility, built on co-owned measurement, embedded finance partners, and a joint defense of intangibles as infrastructure rather than only a focus on expenses.
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> The second is Marketing as the enterprise growth connector that braids the silos between consumer insight, product, commerce, service, and technology, because the customer journey crosses every boundary the org chart raises. The job is not to claim ownership of adjacent functions but to be the connective tissue that makes the whole architecture coherent - through flatter, problem-focused structures, cross-functional squads for specific initiatives, and reporting lines drawn around peer learning rather than hierarchy.

One large technology company illustrates the skills- based organization in operation through an AI-powered internal talent marketplace that dynamically matches people to projects, capabilities, and learning paths - an adjacent proof point for the mechanism that enables cross-functional deployment.

Practical next steps.

- Help install stability within the project-driven matrix: people belong to a department for a sense of home and deliver daily value through interdisciplinary projects.
- With the CEO and Board, position Marketing as connective tissue, not as a claimant for ownership of adjacent functions.
- With the CFO, push for Marketing-attributed contribution to enterprise growth rather than Marketing-specific ROI.

Questions for discussion

- *When a major growth opportunity surfaces, can we assemble the right cross-functional team within a week, with shared metrics and decision rights?*
- *Only 20% of organizations say they are organized effectively to capture new growth. Where is the connective tissue thinnest in ours?*
- *Where is Marketing best placed to serve as the connector—and where would claiming ownership of an adjacent function backfire?*

5. Developing, Nurturing, and Measuring Intangibles

Trust, reputation, brand equity, customer lifetime value

As tangible advantages commoditize, intangible assets become the decisive source of durable value - yet the enterprise's instrumentation is structurally blind to them. Standard financial reporting was designed generations ago to let suppliers of capital compare firms, not to assess the strategic contribution of intangibles: it treats Marketing as a period expense. It admits only acquired brands to the balance sheet. A layered architecture - developed by Jonathan Knowles - for performance reporting, the *4Rs*, gives the enterprise a way to see the rest: the relational impact on stakeholder wellbeing, the responsible financial impact on all stakeholders, the reflective impact on shareholders, and the reductive transaction value that accounting requires. The economics are real: high-trust customers are several times more likely to prefer a brand, and a deliberate balance between brand- building and short- term performance can substantially lift return on investment- yet short- term metrics keep pulling investment the other way.

The interviews give trust and brand equity their commercial edge. CMOs note that high trusters have a far higher propensity to prefer a brand, that a strong brand shows up as pricing power that holds even as volumes are tested, and that a price premium is, in one leader's words, the only reason a brand exists. Reputation is reframed as external - it is not what you say your brand is; it is what others say it is, which is why off-brand AI content must be strictly governed. Trust drives market share, and fully machine- led brands eventually look, sound, and feel the same and feel disposable. Trust is a relational bond, not an informational one; you cannot code it, it takes years to build and can be lost overnight, especially when brands misread cultural nuance - as several high- profile backlashes have shown. And the balance- sheet point is made bluntly: when a company changes hands, what is really being sold is the brands. In fast- moving consumer goods, without a durable premium over private label, the expensive Marketing model is too costly to survive.

The wider C-suite names the structural tension directly as a trust–measurement paradox: trust is universally declared foundational, yet the demand for measurable ROI systematically pulls investment away from the long- term assets that build it - brand equity, culture, customer experience. It points to a reframe from brand custodian to trust architect, in which Marketing's deepest enterprise value lies in helping build, measure, and protect trust across every stakeholder interface - customers, employees, investors, partners, and communities - not just brand management.

The survey confirms the gap between intent and instrumentation. **Fewer than half of organizations (45%) say they measure intangible assets such as trust, brand equity, talent, and reputation,** so more than half are flying blind on the assets that increasingly carry their value. Only around four in ten say the time horizon of Marketing's targets aligns with Marketing's activities (40%), and the strongest performers are far more likely than the weakest to define both short- and long- term targets (62% versus 32%).

> **The Marketing2030 reframe.** Marketing's help here is the champion of long-term value creation - it is well placed, with both the standing and the cross-stakeholder mandate, to help the enterprise defend long- term investment under short- term pressure. Trust accumulation, brand equity compounding, pricing power, customer lifetime value, the brand-versus-performance mix: these are investments the enterprise will undermake if no function helps protect them, because every other function operates on shorter horizons. Trust is the relational bond without which value creation falls apart - asymmetric, years to build and lost overnight, and, in one CMO's phrase, uncodable.

Two examples ground the measurement shift. One African financial services group judges Marketing effectiveness solely through business growth KPIs that include intangible metrics such as market share growth, return on equity, and customer advocacy, with the CFO acting as an unlocker, not a blocker. One global enterprise software company makes trust its number one corporate value. It operationalizes it across governance, product, employee experience, and AI strategy through a dedicated ethics-and-responsible-use function and published trusted-AI principles, measuring trust as a strategic asset class rather than a soft cultural concept. And one quick-service restaurant brand's patient, multi-year revitalization of its flagship product is a reminder that sustained investment in brand value pays off.

Practical next steps.

- Help adopt a layered measurement architecture – such as the 4Rs model - owned jointly with Finance, so brand equity, trust, pricing power, and customer lifetime value sit alongside short- term conversion in the same scorecard.
- Help set and defend an explicit brand- versus- performance ratio - the act of setting and defending a ratio is what separates intentional investment from reactive.
- Build a pricing power tracker: can the brand raise prices without losing volume? If not, it is not yet earning its place.
- With the Board, help frame trust as a strategic asset class, with the same governance discipline applied to financial capital.

Questions for discussion

- *If our company were sold tomorrow, would the buyer be paying for the balance sheet - or for the brands and trust that aren't on it?*
- *More than half of organizations don't measure their intangibles. Which one are we most exposed to because we don't track it?*
- *Can our brand take price without losing volume? If not, what would it take to regain that pricing power?*

Driving more Humanized Growth

Pulling the five areas together, Marketing's contribution across all of them is to help the enterprise understand, engage, and represent the people it serves - customers, colleagues, communities, capital, and the broader society. When Marketing helps the company do this well, growth becomes more deeply connected to human value creation rather than shareholder returns alone: customer relationships compound, employee meaning improves, the license to operate strengthens, and capital begins to recognize and reward intangible value.

The survey shows the leaders are ahead on exactly these stakeholder measures. The strongest performers are more likely to say they understand the underlying needs of all their stakeholders (54% versus 35%), that they understand the impact their business makes on those stakeholders (66% versus 52%), and that they have a clearly defined strategy across all stakeholder groups (49% versus 28%).

The opportunity outweighs the challenge. AI is raising the floor - making the average better, faster, and cheaper across every category. The ceiling is set by the quality of

Marketing leadership and by the function's capacity to understand the outside world rigorously while staying grounded in its own DNA. The organizations that hold both win, and the Marketing functions that develop both help lead them. Fully machine-led brands eventually look, sound, and feel the same and feel disposable. **Humanized Growth is the alternative: not a separate strategy or metric, but the outcome the enterprise achieves when EGA 2.0 is built well, and Marketing helps across all five areas.**

Getting Practical

This pack is a discussion document. Its purpose is to help the M2030 Leadership Lab participants interpret the M2030 findings together, and decide how to best communicate around the five areas that matter most, and identify the tools, templates, and examples that will be needed to help Marketers globally understand and apply the learning in their own markets – so that we can develop those ahead of the global M2030 launch in October.

Two further bodies of work sit alongside it. **A companion MLL pre-read bundle** covers the personal and leadership dimensions of Marketing2030 - the leadership workstreams (including psychological safety, energy, and the human–AI relationship) and the deepened **Da Vinci Growth CMO** profile, which moves from describing what kind of leader to be toward how a leader thinks. That material is deliberately held separate from this pack so the five functional areas keep their focus; it is referenced here as a forward signpost and explored in full there.

The final M2030 phase will then deliver the assessment and capability- building tools to help CMOs and senior Marketing leaders play a bigger role in EGA 2.0: a personal assessment built on the Da Vinci Growth CMO profile; an organizational benchmarking tool covering the Marketing capabilities every organization needs; capability-building guidance on how to develop them; and an Marketing Ecosystem of the future (Agency2030) workstream focused on how to work with partners, what to insource versus outsource. One survey signal already frames the urgency: while around four in ten leaders say their teams have the skills they need for today (43%), **only around one in ten say they are equipped for the next three to five years (12%)** - the capability gap the final phase is built to help close.