

# NAYI INDIA

## PLAYBOOK FOR GROWTH 2026



SHRIPAD KULKARNI

India has entered the Signal Age.  
Signals everywhere. At once.  
Digital, physical, research, Internal data. Channel data, Direct Store Delivery data, and more.  
You cannot act on it without architecture.  
That is why this Playbook starts with Signals.  
Built to evolve as the market and technology move.

# *How this Playbook found me*

A few months back, out of a whim, and some free time, I started a Podcast on the new central role of Media in today's churning Marketing system. Dr Annurag Batra laid down the landscape.

And, Top Industry Practitioners responded enthusiastically.

The format was only free-flow. And, I listened attentively

Months later, rummaging, and, lots of hours with my AI Agents on Claude and Perplexity, this Playbook emerged.

I have spent years watching Indian brands read their consumer.

Of late, the signals have suddenly multiplied. What the consumer intends, what the trade is doing, what the category is telling us: we have always had these. What has changed is that they now arrive from everywhere at once — digital, physical, research — faster than any team was built to handle.

That is the Signal Age. And it asks for something we did not need before: an architecture. Not a dashboards, a living system capturing every signal as one process, on which the marketing org runs.

This Playbook is that system. Seven Plays, starting with Signals and powered end to end by AI, owned by one Chief Growth Officer. It is deliberately a living document — I will keep building it as the evidence grows and the technology moves, because the market will not sit still, and neither should this.

I built it with Indian CPG brands in mind. For the growth team: the CMO, the promoter, the CFO, the Sales Head, doing the actual work. It is conceptual. But I tried my best to make it as a practical operating guide, not a theory.

This is truly living a blueprint of sorts, so hope it get lots of reactions

Shripad Kulkarni

14<sup>th</sup> August, 2026



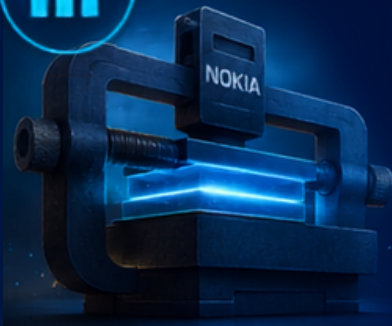
# THE A&M LANDSCAPE

## Dr Annurag Batra names the moment: **Samudra Manthan**



### The Churn Has Begun

He called it a Samudra Manthan. In the ancient telling, the churning of the ocean produced both yish — poison — and amrit — nectar. You cannot have one without the other. The disruption and the opportunity are the same event. His reading of Indian advertising today is precisely that: the vish has already surfaced. The amrit is now emerging. The question is who is positioned to receive it.



### The Nokia Problem

The agency model is facing what he calls the Nokia problem — squeezed from above by consulting firms taking the strategic layer, and from below by specialist boutiques winning on speed and cost. The old holding company model, built for a world where integration was optional, is under pressure from every direction at once.



### India Is an AND Market

India's media stack has not simplified — it has multiplied, linear television, connected TV, YouTube, social, OTT, gaming, out-of-home: not one replacing another, but all coexisting, because India is not an either-or-country. It is an AND market — where the premium end is vast, the value-seeking segment is equally large, and every medium retains its unique quality and its audience.

# THE A&M LANDSCAPE

## contd.



### We Don't Really Want a Good Measurement

The measurement system the industry relies on is, by Dr Batra's own assessment, not designed to find the truth. It is designed to be acceptable to everyone — and those are not the same thing. Broadcasters fund it. Agencies interpret it. Each digital platform offers its own metrics. The result is data without truth, and optimisation without accuracy.



### AI Has Entered the Building

AI has entered the building. Old agency models will not survive it unchanged. Creative production is becoming faster and cheaper. Processes are being automated. The real question is not whether AI is being used — it is how deeply it is embedded into strategy, not just execution.



### The CMO Must Become The Chief Growth Officer

And the CMO's mandate has quietly expanded beyond what most organizational structures have kept pace with. Marketing is no longer about advertising. It is not even about marketing. It is about growth. The Chief Marketing Officer — and the organisations that have not restructured around that reality are already behind.

# EXECUTIVE SUMMARY

## SEVEN PLAYS. ONE SYSTEM

The Signal Age has arrived. India's consumer sends more signals, from more places, faster than ever — digital, physical, research, all at once. Growth now belongs to the brands that build the architecture to read them. The Nayi India Playbook is that architecture: seven connected Plays, owned by the Chief Growth Officer, powered end to end by AI. It starts with the signal — and it is built to keep evolving as the evidence grows and the technology moves.

**1. SIGNALS** — Read the signal first. Then the demographic.

Capture digital, physical and research signals as one living architecture — Consumer, Trade, Category — the foundation every Play runs on.

**2. SURFACES** — Plan the job. Then the channel.

Every surface does a job — a different one for tomorrow's consumer than for today's. Plan the system, not the channel list. Mobile-first, not mobile-only.

**3. CONTENT ECOSYSTEM** — Every piece earns its place.

Name the job first, then maker, format, language. Regional-first, always. A content system, not a calendar.

**4. PERFORMANCE FIRST. BRAND NEXT** — Capture today. Build tomorrow.

Not a choice — a sequence. Performance captures the demand that exists; brand builds the demand that arrives. Build at both ends.

**5. COMMERCE** — Search to sale. Sell first.

Five tracks, one integrated stack — quick commerce, general trade, modern trade, e-commerce, D2C. Every track sells first, then feeds a signal back.

**6. MEASUREMENT** — Spends left. Sales right.

Connect every rupee of spend to a rupee of sales. Every rupee carries a clear logic — now, next or later — and a way to be measured over time.

**7. AI** — Powering all six.

Not a seventh part — the system that runs the whole. Build → Execute → Measure → repeat, an AI system beside a human decision at every stage. Human First. AI Second.



# THE FOUNDATIONS

The Seven Plays run on this Foundation

## GOVERNING PRINCIPLES



### GOVERNING PRINCIPLE 1

Every marketing rupee should link to sales .



### GOVERNING PRINCIPLE 2

The Cheif Growth Officer. One person with Authority & Responsibility for decisions across Brand, Media, Commerce, Measurement & AI



# THE FOUNDATIONS

The Seven Plays run on this Foundation

## NEW RULES



### NEW RULE 1:

MOBILE FIRST. BEFORE THE BRAND CAN BE MOBILE FIRST – THE TEAM MUST BE MOBILE FIRST.



### NEW RULE 2:

THERE ARE ONLY TWO AUDIENCES: TODAY'S CONSUMERS. TOMORROW'S PROSPECTS. START THERE.



### NEW RULE 3:

ONE SYSTEM. ONLINE AND OFFLINE. DIGITAL'S DISCIPLINE FOR ALL OF IT. ONE MEASUREMENT FRAME.





PLAY 01 OF 07

# SIGNALS



# PLAY 1 SIGNALS

The foundation everything runs on

## Read the Signal First. Then the Demographic

Signals is where the Playbook starts — the first big move. Everything downstream runs on it. The discipline is simple: read the signal first, then the demographic. The demographic is not wrong. It is second. Digital is the signal you already know — but it is one signal, not the system. Read three together: Consumer, Trade, Category. Configured for your category. Running at once Consumer tells you what she intends. Trade is pipeline and offtake — where she is, which SKUs are moving to her. Category is the market beyond your share — the CEPs, when and how she buys the category, the consumers you don't yet have. Non-digital signals carry the same rigour as digital ones. Do this first: audit every source, rate its quality honestly, count your consumers by identity level



### SIGNAL

Consumer

### WHAT IT READS

What she intends — her behaviour, her purchase, her next move

### READ IT VIA

Search & AI query, social, UPI, first-party CRM

### START HERE

Read the live intent signals you already hold

Trade

Pipeline and offtake — where she is, which SKUs are moving to her

Primary & secondary sales, DMS, SFA, RMN

Marry physical distribution data with digital signals

Category

The market beyond your share — the CEPs, how the category buys, not just your customers

Kantar, NielsenIQ, Worldpanel, search clusters

Read category penetration honestly — the demand you don't yet own

# Non-Digital Signals Same Rigour

| no. | MOVE                                                                                                           | DO NOW (2026)                                  | BUILD NEXT (2027)                                                                                                          | SIGNAL / LEVEL                                                                                             |
|-----|----------------------------------------------------------------------------------------------------------------|------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| 1   |  <b>Audit</b>                 | Count Level 1, 2, 3 consumers honestly         |  Set a Level-1 target for 2027            |  Identity baseline      |
| 2   |  <b>Two signals</b>           | Identify the two most critical to category     |  Configure to your category triggers      |  Consumer + Category    |
| 3   |  <b>RMN access</b>            | Access RMN — most live in-market signal        |  Scale across QC + e-commerce             |  Consumer + Trade       |
| 4   |  <b>Signal brief</b>         | Give agency a signal brief, not demographic    |  Generate the brief from signal          |  Consumer              |
| 5   |  <b>Owned touchpoint</b>    | On-pack QR — WhatsApp — loyalty sign-up        |  Scale PII to 10–20% of base            |  PII - Level 1        |
| 6   |  <b>Platform identity</b>   | Install Meta CAPI, Google Enhanced Conversions |  Unify Tier 4 into a CDP                |  Digital ID - Level 2 |
| 7   |  <b>Clean room</b>          | Build one QC + one e-commerce partnership      |  Match first-party to retailer purchase |  Verified purchase    |
| 8   |  <b>Today / tomorrow</b>    | Two briefs, two plans, two budgets             |  Build predictive identity              |  Levels 1–3 vs 3–4    |
| 9   |  <b>Unify &amp; predict</b> | Connect CRM, RMN, social into one view         |  AI identity updating in real time      |  Unified - all tiers  |

Read it as a ladder, not a checklist. Start at Move 1 — audit — wherever you think you are. Digital signals are easy to read; the harder, more valuable read is the non-digital ones — pipeline, offtake, field, category — held to the same rigour. Do the NOW column first, in order. Each signal you unlock compounds into the next: identity feeds the brief, the brief feeds every Play that follows



# Two Consumers. 1 Signal System

## SETTING UP

Planning on age, gender, city. Signal read second, if at all

## BUILDING

Some first-party data. First RMN partnership live

## OPERATIONAL

Unified signal view. Category-configured. Today and tomorrow read separately

## OPTIMISING

Predictive modelling live. The brief written from signal

Read for two consumers. The Shopper — today's consumer, buying now — lives at Levels 1 to 3: retention and upgrade. The Prospect — tomorrow's consumer, about to enter your category — lives at Levels 3 and 4: discovery and acquisition. Two different people, one signal system. Run them as two briefs, two plans, two budgets, at once. The Prospect increasingly asks an AI. Be in the answer

The payoff compounds. Even 2% of consumers in a direct, owned relationship changes everything downstream — it becomes the seed for predictive identity at the scale of millions. Signal feeds identity, identity feeds the brief, the brief feeds content, commerce, every Play downstream. Read the signal first — this is where growth starts. Next: Play 2 · Surfaces, which decides where the message lands





PLAY 02 OF 07

# SURFACES



# PLAY 2 SURFACES

## Plan the Job. Then the Channel

Surfaces are the environments where a CPG brand is seen, recalled, considered, and bought in India. Six core ones — TV, Mobile, Work Screen, Print, OOH, POS / In-Store. None a silo. Each earns its place by the job it does — a different job for the Prospect than for the Shopper, often at the same time. The shift: from channel allocation to systems planning

Ask what job each surface does — and for which consumer. Mobile is the governing starting condition of the whole system — mobile-first, not mobile-only. Do this first: audit your current surface mix, name each surface's role and importance for your category, and check it against both consumers — demand captured, demand built, memory held



### SURFACE

### THE PROSPECT – TOMORROW

### THE SHOPPER – TODAY

Television

Broad memory, emotion, category cues at scale

Primes near-term buying — promotions, launches, seasons

Mobile

Reach via video, social, creators, commerce

Captures active demand — search, retail media, quick-commerce

OOH

High-visibility presence; pack, logo, brand codes

Nudges imminent purchase near stores and routes



# Every Surface Two Jobs

| No. | PLAY                                                                                                                  | SPRINT NOW (2026)                                                                                                                  | SCALE NEXT (2027)                                                                                                                          | KPI                                                                                                              |
|-----|-----------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|
| 1   |  <b>Map surfaces to jobs</b>         |  Name each surface's job — Prospect vs Shopper    |  Add emerging-surface overlays where fit is proven        |  Surfaces with a job (of 6)   |
| 2   |  <b>Set Mobile as start</b>          |  Mobile-first presence, all six surfaces live     |  Connect mobile signals across surfaces                   |  Mobile-first reach %         |
| 3   |  <b>Grow memory (Prospect)</b>      |  Broad reach, distinctive assets, more CEPs      |  Extend into voice + AI-led discovery                    |  Mental availability / CEP   |
| 4   |  <b>Maintain availability</b>      |  Facings, listings, POS, persistent visibility  |  Connected-device replenishment; always-on retail media |  Availability / on-shelf %  |
| 5   |  <b>Capture demand (Shopper)</b>   |  Search, retail media, quick-commerce, in-store |  AI-assistant nomination at the intent moment           |  Demand-capture conversion  |
| 6   |  <b>Plan system, measure whole</b> |  Assign roles; avoid double-counting            |  Cross-surface standard; reassess every six months      |  % surfaces measured as one |

Read it as a system, not a channel list. Every surface carries one of three jobs — grow memory for the Prospect, hold presence and availability, or capture demand from the Shopper. Mobile is where you start, not where you stop. Do the Sprint Now column first. Assign a role to every surface; if one does neither memory nor capture, question it.



# One Connected System of Influence

## SETTING UP

Surfaces bought by label and budget line. Each stands alone

## BUILDING

Each surface's job is named. Mobile set as the starting condition

## OPERATIONAL

Surfaces run as one system. Roles differ for Prospect and Shopper. POS and retail media

## OPTIMISING

Roles reassessed on data. Emerging surfaces tested. Measurement holistic

Read every surface for two consumers. The Prospect — tomorrow's consumer, out-of-market now but likely to buy later — is the larger audience; long-term growth builds memory and availability here. The 95:5 view: few are in-market at any moment, most are future demand. The Shopper — today's consumer at shelf, search, or checkout — is the business on the table. Same surface, two jobs

Plan the system and it compounds — TV memory makes Mobile capture cheaper; POS closes what OOH primed. AI now reads surfaces too: brands are recommended by machines, not only recalled by people — so make every surface legible to AI, structured and distinctive. Surfaces carry the message. Next: Play 3 · Content decides what the message is





PLAY 03 OF 07

# CONTENT ECOSYSTEM



# PLAY 3

## CONTENT ECOSYSTEM

### Name the Job First

A content calendar asks what to post. A content system asks what job each piece does — who makes it, how long, in which language. That is the move: from calendar to system. Attention across tested ads has fallen sharply in three years. Volume is not the answer. Content with a clear job is. Every piece must earn its place — or it is not made

Name the job first — convert, build a Category Entry Point, trigger impulse, carry the offer, or grow memory.

Then decide maker, format, language. Choose format  
Bumper / 6s • Short video <15s • Vertical 15–30s • Video 30–60s • Film 1–3 min • Film 3 min+ • Static / product • Carousel / infographic • Shoppable / live • AR try-on / interactive • Audio / branded audio • Creator / UGC (lo-fi) • Retail-media unit. Match format to job. Brief regional-first — always a separate brief per language, never a dubbed version. Performance creative and brand creative are different crafts: performance hooks in three seconds; brand earns attention through story and culture

### The Brief in Four Questions

#### QUESTION

#### THE TEST

Job

What is this piece here to do — convert, build a CEP, trigger, carry the offer, grow memory?

Maker

Who makes it — In-house, Agency, Creator, UGC, or AI?

Format

Which length + surface — from a 6s bumper to a 3 min+ brand film?

Language

Which market — always a separate regional-first brief, never dubbed?



# Build The Calendar

| # |  SPRINT NOW (2026)                                                                          |  SCALE NEXT (2027)                                    |  KPI                         |
|---|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| 1 |  <b>Ask the four questions</b><br>Every piece answers Job / Maker / Format / Language first |  Bake the four into the brief template + agency scope |  Pieces passing all four %   |
| 2 |  <b>Fix the maker mix</b><br>Rebalance toward creators + commissioned UGC                   |  Commission regional micro-creators at scale          |  Creator / UGC share %       |
| 3 |  <b>Match format to job</b><br>Assign each length its job + surface                        |  Format libraries; AI variants per job               |  Formats mapped to job      |
| 4 |  <b>Go regional-first</b><br>Separate culturally-tuned brief per language                 |  Regional creator networks across six languages     |  Languages live            |
| 5 |  <b>Always-on + campaign</b><br>Stand up the 365-day creator / UGC layer                  |  Always-on becomes the compounding engine           |  Always-on pieces / month  |
| 6 |  <b>Measure Perf &amp; Brand apart</b><br>Split the read — conversion vs CBP growth       |  Predictive content — AI spots forming CBPs         |  Performance vs Brand read |

Read it as a system, not a calendar. Every piece carries a job — convert the Shopper now, or grow the Prospect for later. The highest-trust, highest-impact maker for Indian CPG is the regional micro-creator in the local language, talking to a community they already know. Do the Sprint Now column first. Run always-on beside your campaign bursts, and the library compounds.



# Focus on the Job. Where You Stand?

## SETTING UP

Content calendar only  
Brand-made dominant.  
One language. No four-question brief.

## BUILDING

Creator content.  
commission UGC. Format varies by surface/  
Region

## OPERATIONAL

All four questions answered for every piece.  
Always-on running.  
Regional live.  
AI for variants

## OPTIMISING

Full content system. AI + human hybrid at scale.  
Micro-creators .  
Performance and Brand

Content does many jobs, and the job comes first. Convert the Shopper — short, direct, product early, the trigger firing in seconds. Grow the Prospect — emotionally resonant, culturally specific, building the Category Entry Points that bring her to you before she is ready to buy. Name the job first, and the content writes to a purpose — not to a calendar slot

Three in four of India's internet users prefer their own language; regional-first is the default, not the exception — a Tamil-first creator brief beats a dubbed Hindi one. AI changes the economics of content, not the strategy: use it for volume, variants, and testing; use humans for trust and cultural resonance. Content earns the attention. Next: Play 4  
• Performance turns attention into outcomes





**PLAY 04 OF 07**

**PERFORMANCE FIRST.  
BRAND NEXT**



# PLAY 4

## PERFORMANCE FIRST. BRAND NEXT

### Performance First. Brand Next

Performance and Brand are not a choice. They are a sequence. Performance first — it captures the business already on the table. Brand next — it breaks the ceiling performance alone will hit. Performance gets you to 100; brand takes you to 1000. The tools that built the first hundred are the wrong tools for the next nine hundred. India is an AND market — build at both ends. Not prioritised — sequenced. Performance captures the demand that exists today; brand builds the demand that arrives tomorrow. Do this first: capture the business on the table — win the Shopper with performance. Baseline your brand-to-activation split, honestly. Start building ad stock before the ceiling closes. Move from hunting to attracting. Master the two bookends — first-party data and creative that travels

#### PERFORMANCE FIRST

Job

Captures demand that already exists

Wins

The Shopper — business on the table

Force

Push

Nature

Fast, measurable, efficient — to a ceiling

The Number

Gets you to 100

#### BRAND NEXT

Creates demand that does not exist yet

The Prospect — the market you've not met

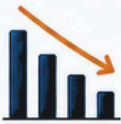
Pull

Slow, compounds, breaks the ceiling

Takes you to 1000



# Capture Today Build Tomorrow

| No | PLAY                                                                                                                          | SPRINT NOW (2026)                                                                                                                        | SCALE NEXT (2027)                                                                                                                 | KPI                                                                                                              |
|----|-------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|
| 1  | <b>Capture the business</b><br>              |  Win the Shopper — search, retail media, quick-commerce |  Carry brand cues into activation                |  ROAS - cost per sale         |
| 2  | <b>Measure every rupee</b><br>               |  ROAS, cost per sale, incrementality                    |  Cross-check platforms vs MMM — trust the MMM    |  Incrementality %             |
| 3  | <b>Set the brand : activation dial</b><br> |  Baseline your split, honestly                         |  Toward 60:40, calibrated to your market        |  Brand : activation ratio    |
| 4  | <b>Build ad stock</b><br>                  |  Start brand alongside performance                    |  Sustain brand through a soft quarter          |  Base sales, spend off      |
| 5  | <b>Move hunt to attract</b><br>            |  Track your acquisition-cost trend                    |  Brand pull lowering acquisition cost          |  Acquisition-cost trend     |
| 6  | <b>Master the two bookends</b><br>         |  First-party data + creative that travels             |  Bookends drive the plan; media is operational |  First-party reach · travel |

Read it as a sequence, not a choice. Performance is where you start because it pays today; brand is where you go because it pays for years. The 60:40 split — 60 brand, 40 activation — is Binet & Field's proven anchor across 996 case studies, not a rule: calibrate it. More brand for a Bharat entry; more activation for urban defence. Do the Sprint Now column first. The leverage lives at the bookends



# Build At Both Ends. Where You Stand?

## SETTING UP

Performance only. Sales rise with spend, fall when it stops. No ad stock. On the tiger's tail

## BUILDING

Performance capturing the Shopper; brand started alongside. Split baselined.

## OPERATIONAL

Sequenced — performance and brand to a calibrated 60:40. Acquisition cost tracked

## OPTIMISING

Brand pull lowering acquisition cost. Ceiling broken. Both bookends mastered

Performance converts existing memory. Where the brand is new, little-known, or entering a fresh market, there is little memory to convert — so clicks stay expensive and shallow. Here, brand and memory come first, or alongside, to give performance something to work with. The less she knows you, the more brand you need before performance can pay

AI builds at the audience of one, at the scale of millions — many cutdowns, several languages, dozens of cohorts, each optimised in real time. What stays human: the decision to sequence brand in, and the courage to hold it through a soft quarter.

Performance captures the demand. Next: Play 5 · Commerce makes sure it can be bought





PLAY 05 OF 07

# FULL COMMERCE STACK



# PLAY 5

## FULL COMMERCE STACK

### Search to Sale. Sell First

The search-to-sale window in India has collapsed from days to minutes. She discovers your brand on Reels at 7pm, orders on Blinkit by 7:15, receives it by 7:25, shares a WhatsApp review by 7:30. The shift: from managing commerce as distribution to running it as a live stack — where every track sells first, then throws off a signal that feeds the next cycle. Being stocked is the minimum. Being available, visible, and discoverable in the right track — for the right purchase mode, at the right moment — is the job. Do this first: map which of the five tracks your category wins leads and sales on. Give quick-commerce and e-commerce their own SKU and pricing architecture. Build one owned D2C touchpoint. Commerce carries a live communication layer — the right offer and the right message, delivered in the moment, through the commerce tracks

| Track          | Role                        | Brand Job                                                 | Sells- Signals                           |
|----------------|-----------------------------|-----------------------------------------------------------|------------------------------------------|
| Quick Commerce | Velocity — urban impulse    | Right dark store, postcode, hour; win in-app search       | Impulse sales → demand by SKU, geo, hour |
| General Trade  | Volume backbone — 75%+ FMCG | Distribution depth; SFA beat coverage; never out of stock | Volume sales → beat coverage, stockouts  |
| Modern Trade   | Premium shelf, gifting      | Win the planogram and the gifting aisle                   | Premium sales → scanner, basket data     |
| E-Commerce     | Planned, review-led         | E-comm-native SKUs; win search; optimise the PDP          | Planned sales → search, review sentiment |
| D2C/Direct     | Owned relationship, loyalty | One owned touchpoint; collect identity; reorder           | Direct sales → PII, history, LTV         |



# Five Tracks

## 1 Integrated Stack

| No. | PLAY                                                                                                               | SPRINT NOW (2026)                                          | SCALE NEXT (2027)                                   | KPI                                                                                                                   |
|-----|--------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|-----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| 1   |  <b>Stock Quick Commerce</b>      | Right dark store, postcode, hour, win in-app search        | OC-native SKUs; stocking run as media investment    |  Dark-store in-stock %             |
| 2   |  <b>Hold General Trade</b>        | Distribution depth, SFA beat coverage, margins held        | <b>Kinana</b> as retail + dark store + delivery     |  Beat coverage %, <b>stockouts</b> |
| 3   |  <b>Win Modern Trade</b>          | Win the planogram; gifting aisle before the occasion       | Category captaincy; scanner data feeding pack/price |  Planogram + gifting share         |
| 4   |  <b>Build E-commerce-native</b> | <u>E-comm</u> SKUs that don't undercut trade; optimise PDP | Search + review signals feeding the content brief   |  Search share, PDP conversion    |
| 5   |  <b>Build D2C / Direct</b>      | One owned touchpoint; collect identity; reorder            | ONDC to cut commission; LTV feeds Identity Stack    |  First-party records, reorder    |
| 6   |  <b>Run Communication Layer</b> | Offer + message on the go — QC, WhatsApp, RMN, push        | Automated offer by track, postcode, hour            |  Offer-to-sale conversion %      |
| 7   |  <b>Integrate the stack</b>     | Connect one track's data + signal into the plan            | Predictive commerce — SKU, dark store, hour         |  Tracks integrated (of 5)        |

Read it as one integrated stack, not five channels — all five tracks run at once, each selling first, each with its own SKU strategy, pricing, offer, and signal. Quick commerce is the velocity engine; general trade the volume backbone; D2C the only track where you own the relationship. Do the Sprint Now column first. Sell on every track; carry the offer live; then connect the data — integration is where it compounds



# Every Track Sells. Every Signal Connects

## SETTING UP

Active on GT and MT by default. QC beginning. No D2C. Commerce data not connected

## BUILDING

QC, GT, MT active. E-commerce listed. First D2C touchpoint. commerce data briefs

## OPTIMISING

All five tracks selling. Each track's data feeding the plan. ONDC piloted. D2C database growing

## OPERATIONAL

Full five-track stack. Live communication layer. Data loop running. D2C LTV driving the Identity Stack

Each track sells first — then throws off a signal, and the brand that connects them compounds. Commerce is the integration layer: QC demand, GT stockouts, MT scanner data, e-commerce search, D2C identity — connected into one read. That integrated view is the transaction layer that validates every media investment: it tells you which offers close, which CEPs convert, which surfaces drive which sales, and where. Sell first. Integrate everything

Commerce is where the consumer becomes the Shopper — the decision, the transaction, the message that closes it. D2C is where you begin the relationship with the Prospect, collecting the first-party identity that powers everything upstream. AI turns the integrated stack predictive: which SKU, which dark store, which offer, which hour — before the demand fires. Commerce makes sure it can be bought. Next: Play 6 · Spends-to-Sales connects every rupee to the sale



PLAY 06 OF 07

**CONNECT SPENDS  
TO SALES**



# PLAY 6

## CONNECT SPENDS TO SALES

### Spend Left. Sales Right

Measurement is the operating system that tells every other Play whether it is working. The shift: from a broken, agreed-upon number no one fully trusts — to a simple ledger you start today. Every rupee of spend on the left. Every rupee of sales on the right. Read what moved what. You do not need perfect data to start — you need the two columns, and the discipline to fill them

The rule goes further: every marketing rupee must carry a clear Sales Logic — Now, Next, or Later — a stated link-type, and a way to be measured over time. Do this first: pool every spend on the left; pool your sales on the right — Primary, Secondary, Tertiary, each in Volume and Value. Then read which spend moved which measure, and the gaps between the three

#### THE LEDGER

Spend (left)

Primary sales

Secondary sales

Tertiary sales

#### WHAT IT CAPTURES

Every rupee out — TV, digital, retail media, trade, content, promotions. An indication, not a list

Factory → distributor. The company topline

Distributor → retailer. The pipeline

Retailer → consumer. Consumer offtake — the demand truth

#### ACCURACY

Whatever you have, however you have it

High — furthest from demand

Mid

Hardest — QC & D2C make it visible

# Every Rupee, a Sales Logic

Tag every spend line by how explicitly it connects to sales. Deterministic — directly observed, one-to-one. Probabilistic — modelled or inferred, with a confidence level. Hypothesis — an explicit, testable claim, new or intended, set up to be measured. Assumed — category or brand convention, believed true, not yet tested. The discipline: move every rupee up the ladder — Assumed → Hypothesis → Probabilistic → Deterministic. Turn belief into evidence

## How Good Is The Sales Link

| MARCOM LINE                                                                                                              | SALES LOGIC             | LINK TYPE                                                                                         | HOW IT'S MEASURED                                                                                                        |
|--------------------------------------------------------------------------------------------------------------------------|-------------------------|---------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
|  <b>Performance - search - QC ads</b> | Now (Shopper)           |  Deterministic |  Platform + clean room — observed   |
|  <b>Retail media</b>                  | Now (Shopper)           |  Probabilistic |  Clean room + incrementality        |
|  <b>TV - OOH - brand film</b>         | Next / Later (Prospect) |  Probabilistic |  MMM — modelled lift                |
|  <b>Trade spend</b>                   | Now                     |  Assumed       |  Conversion — set a holdout to test |
|  <b>New creator - new surface</b>     | Later (Prospect)        |  Hypothesis    |  Stated claim + holdout planned     |



# Read As Sequence



| No. | PLAY                                                                                                                    | SPRINT NOW (2026)                                         | SCALE NEXT (2027)                                     | KPI                                                                                                               |
|-----|-------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|-------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| 1   |  <b>Pool your spends</b>               | Every spend into the left column — any number, any format | Line-level consistency; each line tagged by link-type |  Spend captured & tagged       |
| 2   |  <b>Pool your sales</b>                | Primary, Secondary, Tertiary — Volume and Value           | Sharpen Tertiary via QC + D2C signals                 |  Sales depths captured (of 3)  |
| 3   |  <b>Start free</b>                    | Share of Search + brand health — free, today              | AI Share of Voice — ChatGPT, Perplexity, Google AI    |  Share-of-Search trend        |
| 4   |  <b>Steer &amp; prove</b>            | Platform attribution daily: first holdout on the big bet  | Incrementality standard on every major spend          |  Incrementality on top spend |
| 5   |  <b>Read contributors &amp; gaps</b> | Which spend moved which measure; read P/S/T gaps          | Weekly read; contributor trends over time             |  Spend-to-sales read         |
| 6   |  <b>Mature into MMM</b>              | Accumulate 3+ years of consistent weekly data             | Ledger becomes MMM; feeds Signals + Performance       |  Weekly data → MMM           |

Read it as a sequence that matures, not a one-off report. Start free today — Share of Search and brand health fill the ledger before you have anything else. Steer daily on platform attribution, but when it diverges from the model, trust the model. Prove with holdouts. Six engines fill the two columns — from Share of Search to MMM. Over one to two years the ledger matures into MMM — the apex, not a parallel engine

# Start Today Mature into MMM

## SETTING UP

No ledger.  
Spends-sales  
sit in SILOS.  
Budgets  
allocated on  
assumption.  
Reporting on  
Primary only

## BUILDING

Two columns  
started.  
Primary and  
Secondary  
tracked. Share  
of Search live.  
First holdout  
run

## OPTIMISING

The ledger  
has matured  
into MMM.  
Tertiary  
visible.  
Budgets  
reallocated on  
the what-ifs

## OPERATIONAL

All three  
depths (P/S/T  
Volume/Value  
) in one place,  
Platform data  
cross-checked  
with model.  
Gaps read

Run two clocks, always: a brand clock, monthly; a performance clock, weekly. The proven anchor across 996 cases is 60:40 — calibrate it to your market. The gap the ledger closes is real: most FMCG sales still come from non-digital channels where tracking is hard, while most of the audience has moved to digital. That gap is where media decisions fly blind — and the ledger closes it

The return is in the what-ifs — the ledger is a simulation engine, not a report. Act on it, and it improves the P&L, not just the media plan. The tools are available, accessible, often free; the decision to start is the only thing between guessing and knowing. AI matures the ledger into MMM; the courage to act stays human. Next: Play 7 · AI runs the whole system at speed and scale





**PLAY 07 OF 07**

**POWER EVERYTHING  
WITH AI**

# PLAY 7

## POWER EVERYTHING WITH AI

### Search to Sale. Sell First

AI is not a seventh part of the system — it runs the whole system. Plays 1 to 6 each fix one part; Play 7 runs all of them, end to end, on AI. After Carr: when the technology becomes common, the edge is the system you build around it. The rule holds at every stage — Human First. AI Second. The machine multiplies; the human decides.

Do this first: take one campaign — the festive campaign — and run it end to end on the AI Campaign Framework. Build, then Execute, then Measure — and the loop closes, so the next campaign starts smarter than the last. One campaign proves the system; the system compounds from there. Every stage pairs an AI system with your decision. Approval stays human, by design

#### Track

Build · Set the objective

Build · Read the market

Build · Build the brief

Build · Build the creative

Execute · Allocate media

Execute · Connect comm

Execute · Run the campaign

Measure · Effectiveness

#### Role

AI Analytics & Forecasting

AI Signal Intelligence

AI Briefing / Insight Assistant

Generative AI

AI Optimisation

Commerce Intelligence

AI Optimisation + Signal Intelligence

AI Measurement

#### Role

Choose the business goal

Choose audiences & occasions

Approve the brief

Approve idea, message, assets

Approve plan & guardrails

Act on stock, distribution, offer

Approve changes

Decide what changes next



# Build. Execute. Measure. Repeat

| No. | PLAY                                                                                                          | SPRINT NOW (2026)                                                                                                                                      | SCALE NEXT (2027)                                                                                                                  | KPI                                                                                                            |
|-----|---------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|
| 1   |  Set objective & read market |  AI forecasting + signal intelligence; you choose goal & audience     |  Predictive audience & occasion modelling         |  Objective set from data    |
| 2   |  Build brief & creative      |  AI insight assistant + generative; you approve idea, message, assets |  Multi-language versioning at the audience of one |  Briefs & cutdowns produced |
| 3   |  Allocate & run media       |  AI optimisation; you approve plan, guardrails, changes              |  Real-time bidding & creative optimisation       |  ROAS · attention CPM      |
| 4   |  Connect commerce          |  Commerce intelligence; you act on stock, distribution, offer       |  Predictive stock & offer by track and hour     |  Offer-to-sale conversion |
| 5   |  Measure & decide          |  AI measurement; you decide what changes next                       |  MMM-fed, always-on read                        |  Loop cycle time          |
| 6   |  Close the loop            |  Feed the result back as new data                                   |  Each cycle starts smarter — compounding        |  Improvement per cycle    |

Read it as a loop, not a launch. Build with AI and your decisions; execute with AI and your approvals; measure, then feed the result back as new data. Human First, AI Second at every stage — the machine multiplies the work; you direct, shape, and approve. Do the Sprint Now column first, on one campaign. The result becomes the data that makes the next campaign smarter

# The Loop That Compounds

## SETTING UP

AI used as a prompt, for single tasks. No framework. Each campaign from scratch

## BUILDING

Two columns started. Primary and Secondary tracked. Share of Search live. First holdout run

## OPTIMISING

A self-improving loop. The result = new data; each cycle starts smarter than the last

## OPERATIONAL

The whole festive campaign runs on Build → Execute → Measure, an AI system + human

Play 7 is the through-line. Inside one campaign, AI powers the work of every earlier Play: forecasting sets the objective; signal intelligence reads Signals and Surfaces; generative builds Content; optimisation runs Performance; commerce intelligence runs Commerce; measurement matures toward MMM. One framework, running the whole Playbook. The loop belongs to the CGO, who owns growth across all seven Plays

Human First. AI Second — the rule that keeps it honest. The machine multiplies; the decision, the judgment, and the approval stay human. The Prospect increasingly asks an AI rather than searching — so be in the answer, not only the result. Run one festive campaign on the framework, prove the loop, and let it compound. The Playbook runs here — build it, execute it, measure it, repeat



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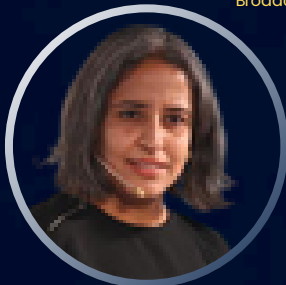
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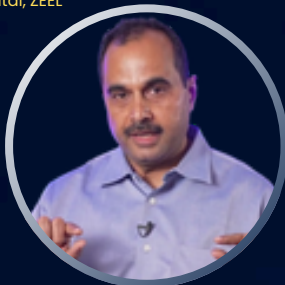
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Thankful to these podcast guests who inspired this Playbook

## WHATS NEXT

This is a living Playbook. It updates as the evidence grows, as AI advances, and as marketing technology becomes the operating spine. Over the next three months, MatheMedia builds it out.

- Prompts — Claude and Perplexity prompts that put every Play to work from day one.
- Flipbooks — the Playbook and each Play, in a shareable format.
- Tools — practical templates that operationalise each Play.
- Case Studies — the Plays, evidenced in the Indian market.
- Tutorials — step-by-step walk-throughs for teams.
- eBook — the complete Nayi India Playbook for Growth.

It starts with the signal. Build the architecture first — then run all seven Plays as one system.

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