

Content Supply Chain



Rethinking content management as an integrated, automated, and GenAI-embedded Content Supply Chain to unleash efficiency while boosting performance

Introduction

In today's rapidly evolving business landscape, where customer expectations are soaring to new heights, the importance of a streamlined Content Supply Chain can not be overstated. With consumers increasingly demanding personalised experiences, native demand for content is rising exponentially. According to insights from an Adobe survey of customer experience leaders, demand for content is projected to skyrocket by 500% over the next two years. "PwC's 2023 Trust Survey" underscores this sentiment, revealing that a staggering 74% of consumers view consistent and reliable customer experiences, driven by tailored content, as paramount for fostering trust in brands.

Amid this surge in demand, businesses are grappling with economic uncertainties, intense competition and shrinking marketing budgets. This confluence of factors underscores the urgent need for Chief Marketing Officers to optimise their marketing operations and explore new strategies to accelerate efficiency and performance while simultaneously demonstrating returns on investment.

In this landscape of increasing internal and external expectations, advanced technologies such as generative AI (GenAI) offer a compelling opportunity for businesses to enhance efficiency and drive tangible results. According to recent research, content generation and workflow optimisation emerge as two of the top three value-adding, fully feasible GenAI use cases, allowing organisations to unleash significant efficiency gains. Transforming content management into a holistic, integrated and GenAI-embedded Content Supply Chain will enable businesses to unlock newfound agility and productivity while optimising their use of resources.





What is the Content Supply Chain approach?

Content management is far from new. In fact, creative content creation is the original cornerstone of marketing. Since its inception, Marketing has evolved from a “Mad Men” era, where creativity and budget led operations, to a „math men“ world, characterised by fully optimised, data-driven audience management.

In this “math men” world, the Content Supply Chain concept represents a novel strategic approach for rethinking the process of creating and activating content. While the idea may appear straightforward at first sight, a Content Supply Chain entails a comprehensive framework that extends far beyond surface-level content management. At its core, the Content Supply Chain encompasses five key phases: planning, creation, review, distribution, and analysis. This structure ensures a seamless flow of content from conception to execution, incorporating vital checkpoints for quality control and performance evaluation.

The Content Supply Chain framework introduces a closed-loop approach – a paradigm shift towards continuous optimisation and refinement. Integrating insights from content analysis back into content planning and creation fosters a dynamic ecosystem. This ongoing process enhances content quality, relevance and effectiveness, while also accelerating the pace of innovation and adaptation.

Organisations face certain content management challenges

Our work with numerous organisations across industries has shown us that conventional content management is dominated by a variety of limitations on efficiency and performance.

Poor personalisation: Organisations face challenges around content velocity, leaving them unable to deliver personalised content in time. The long lag time between capturing customer intent and generating or activating personalised content leads to opportunities for engagement and conversion being missed.

Lack of transparency: Organisations are grappling with a lack of transparency regarding asset availability, usage and performance. According to Adobe Research, this opacity results in content wastage of a staggering 25% due to duplication and redundancy, contributing to inflated costs and suboptimal resource allocation.

Disconnected processes: Processes between marketers responsible for personalisation use cases and content production are often siloed and disconnected. This fragmentation hampers collaboration and agility, hindering organisations’ ability to deliver timely and relevant content.

Lack of a centralised content repository: Many organisations struggle to maintain a centralised single source of truth for approved, brand-compliant content. According to Fotoware, this impedes local campaign execution, with 31% of marketers facing challenges in sharing content with stakeholders across the organisation.

Four principles for designing a Content Supply Chain

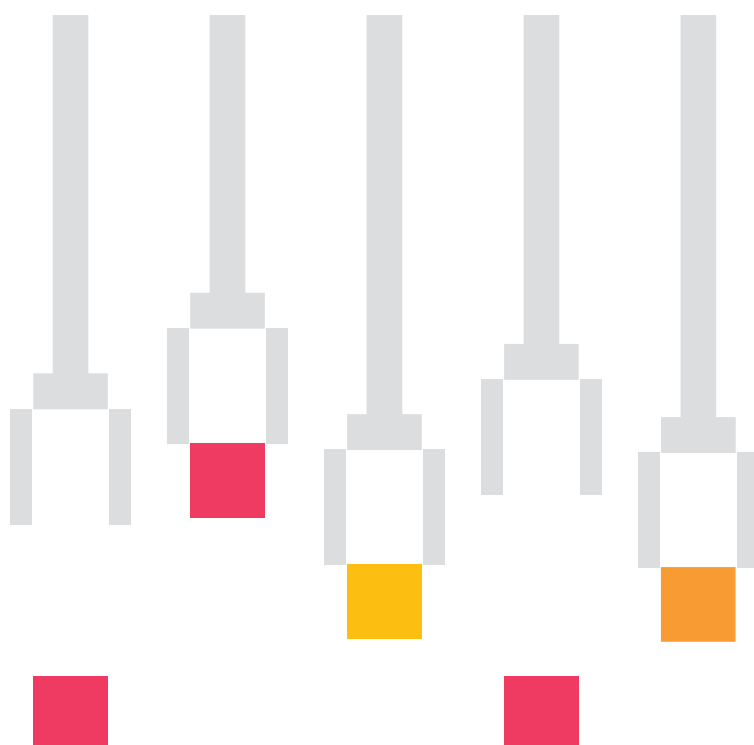
Designing a state-of-the-art Content Supply Chain is inevitably a complex proposition, and the variety of functional considerations – combined with the involvement of multiple stakeholders and business areas, each following their established ways of working – increases this complexity even further. We are convinced that execution must follow a clear strategy in any major transformation. The following four principles serve as guidelines for designing an effective Content Supply Chain strategy that works while considering organisation's individual requirements.

Composable yet integrated: A composable Content Supply Chain is designed as a system of independent, self-contained, and interchangeable components that, taken together, form a seamless end-to-end process. Five high-level phases serve as the foundation of the concept: planning, creation, review, distribution and analysis. Detailed components in these phases need to be defined to fit the organisational structure, considering a company's individual maturity level and business model. It is vital to ensure that each component has a dedicated purpose, is managed by a team of experts, and can be optimised independently while contributing to the overall process. This approach makes the Content Supply Chain resilient, agile and adaptable to change, helping to create a more flexible and efficient ecosystem. In this context, integration ensures that these composable components work together efficiently, covering technological, procedural and organisational aspects. In other words, a Content Supply Chain is a unique ecosystem, differentiating a company from competition, while at the same time boosting efficiency by leveraging the best solution for each component. For instance, integrating digital asset management (DAM) tools with experience activation platforms enables real-time updates and streamlined workflows, ensuring that up-to-date, relevant and approved content is used for customer engagement.

Standardised yet flexible: Standardisation in a Content supply chain involves following a globally aligned strategy and focusing on applying standard features of software vendor throughout the ecosystem. This harmonization of strategy and technology is a key enabler of integration and scalability, resulting in faster time to value and greater cost effectiveness. Despite the advantages of standardization, a certain level of flexibility is also crucial for building resilience and enabling continuous innovation. This adaptability is closely related to the composable setup and allows quick adaptation to new demands and technological disruption. It ensures that the Content Supply Chain can operate smoothly despite change. For example, adapting a globally designed Content Supply Chain to meet local requirements is essential for delivering consistent and relevant content in individual markets while maintaining overall quality and coherence from a brand perspective.

Automated yet secure: Automation is key to achieving efficiency in the Content Supply Chain. Trigger-based process execution can be used to automate workflows, allowing the growing demands of millions of customers to be met at scale. Releasing control of process executions with confidence requires effective integration of technological components and high-quality data. Imagine a customer visiting a brand's website: in an automated Content Supply Chain ecosystem, the personalisation engine can request the most relevant content for this particular customer, in the right format, from the content library and display it instantly to personalise the user experience in real time. However, this high level of automation requires robust security measures to protect data and maintain integrity. Content serves as an organisation's face to the customer, and no company wants to lose that face. Maintaining governance and compliance is therefore essential. As the Content Supply Chain matures, natively more customer data is used to personalise content. This makes strict data governance even more necessary. According to our PwC governance framework, we recommend applying governance measures guided by four pillars: purpose, processes, people and performance. Organisations that balance automated, personalised customer experience with customer privacy are rewarded with trust, which – according to 93% of business executives – improves the bottom line.

AI-embedded yet business-driven: The Content Supply Chain offers several opportunities to apply AI technology to boost performance and increase efficiency. AI, particularly GenAI, excels with unstructured data in use cases such as automated content tagging, content recognition and generation, and AI-based review against guidelines and policies. But although AI offers great potential for boosting efficiency and performance, a Content Supply Chain must remain business-driven. Critical assessment of AI usage along the supply chain and within each composable component against the organisation's AI strategy and its return on investment (ROI) will become a game-changing force. At the same time, it's important to consider the fact that deploying AI technology, especially GenAI, might lead to further regulatory duties according to the EU AI Act, intensifying the need for strong governance to mitigate risk.

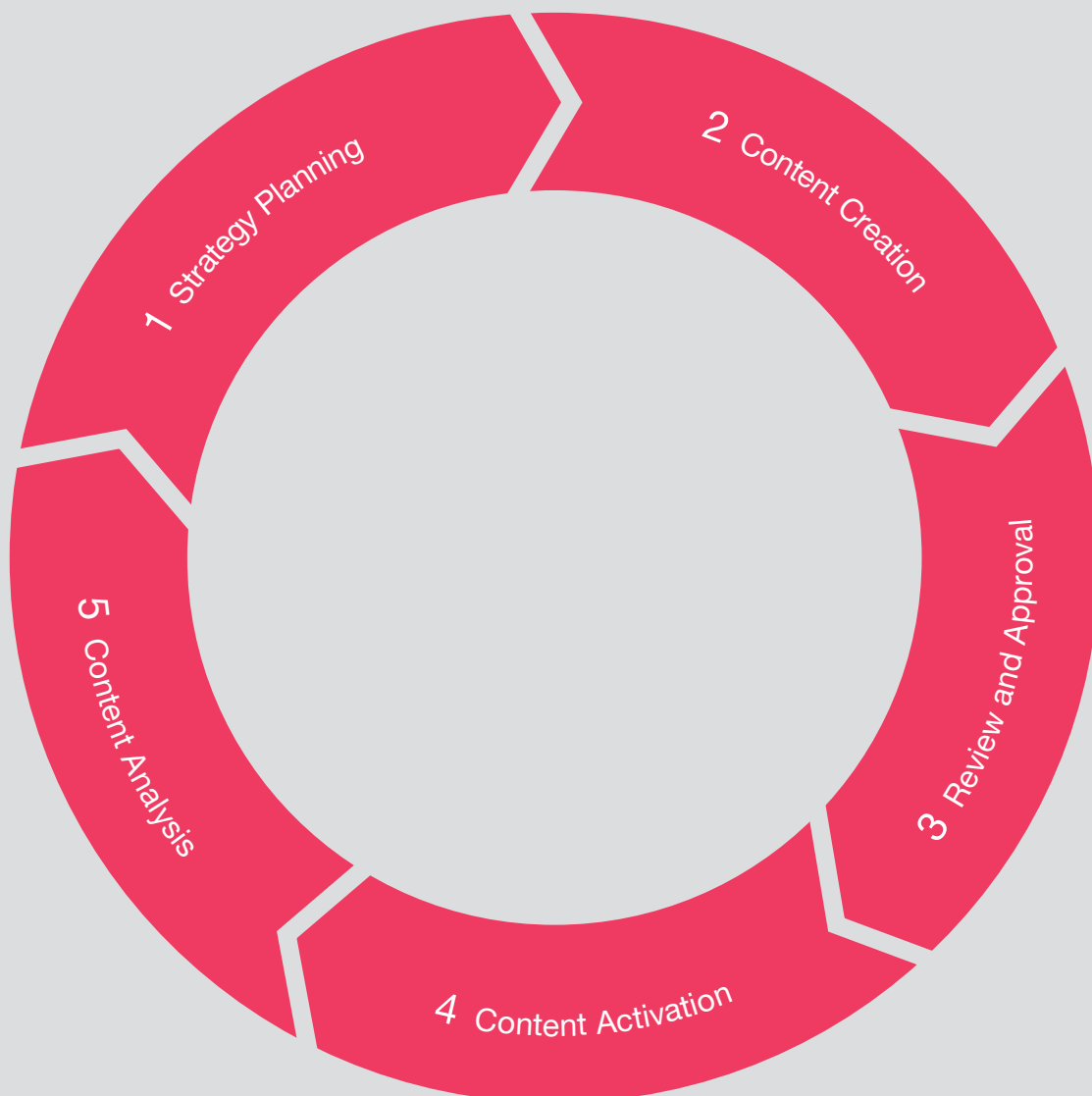


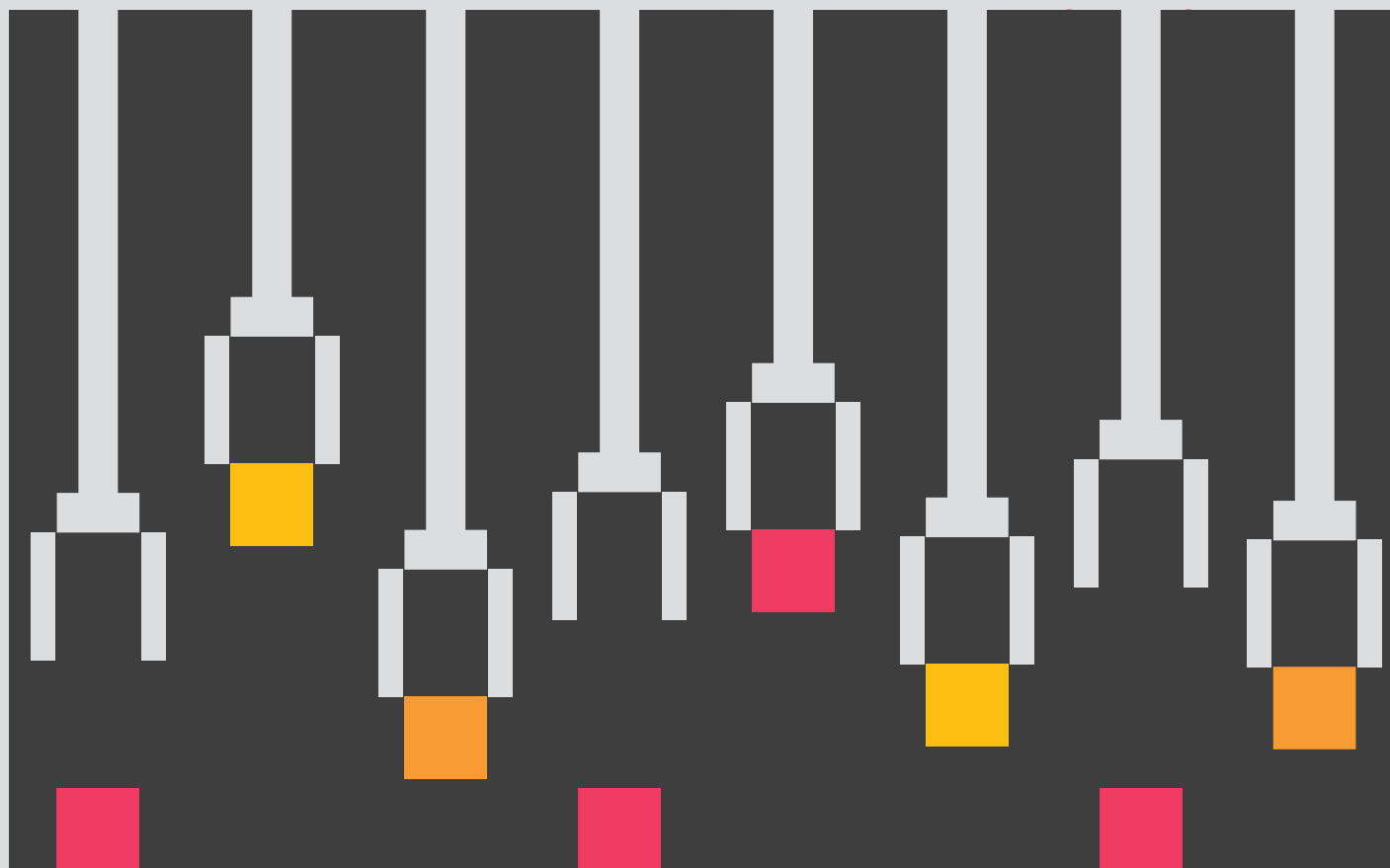
Transformation with the Content Supply Chain requires a human-centric approach

Talking to organisations across various industries, we recognise the tremendous potential of transformation with the Content Supply Chain, both in terms of cost savings and increased performance. However, we repeatedly encounter the most important, yet also most limiting factor: humans.

content creation by external agencies, to data and analytics teams responsible for reporting. Placing humans at the centre of this overarching transformation is crucial for success. In other words: even the smartest solution cannot serve its purpose if the employees don't make it work.

When setting up a Content Supply Chain, employees need to be motivated and eager to learn as this contribution can become a game-changing force in large transformation projects. Especially in the context of GenAI, where many people are precarious of their future role, it is important to get everyone on board and show the added value that change will bring. Although the benefits of a streamlined Content Supply Chain are evident to most organisations and executives, it is the employees who need to use these processes and technologies and integrate them into their daily routines. As previously outlined, the Content Supply Chain impacts the entire marketing organisation – from planning, through





PwC Case Studies: of realizing value following the Content Supply Chain approach

Aligning content selection with customer data for personalised customer engagement

One of our recent projects involved collaborating with a leading luxury automotive manufacturer from Germany, addressing a critical challenge: lack of available content for personalisation, and underutilisation of produced content by the company's teams. The primary goal was to align brand-driven and campaign-specific content planning and production with customer engagement and personalisation. Our approach involved setting up an agile project team consisting of the client, a creative agency and our PwC experts. We conducted a comprehensive analysis of the content supply chain, focusing on planning, production and execution processes. This revealed that content briefs were not aligned with available customer data.

To address this, we developed a modular and semi-standardised content production approach and enhanced the content planning framework to better match the available customer data. We aligned content production with existing first-party customer data and implemented automated content selection based on real-time customer affinities, significantly streamlining the process. The outcome was a substantial reduction in effort and costs associated with producing additional content using existing content modules. On top of this, the client experienced an increased level of personalisation in customer engagement during car launch campaigns. This project also led to the development of a reusable approach, applicable on a global scale across various car models and markets, effectively setting a new standard for content- and data-driven customer engagement.

Baseline analysis to identify and roadmap efficiency levers in Marketing and Sales

A multinational B2B client consulted us on how to realize their strategy of establishing lean and efficient processes within the Marketing and Sales department. The target set by management was to increase efficiency by reducing costs while improving performance. To tackle this challenge, we adopted a comprehensive approach, starting with quantitative and qualitative baselining. This enabled us to identify key efficiency levers for reducing both operational costs and fixed costs. We then designed a roadmap, emphasising rapid value creation and long-term transformation of the company's target operating model.

Our efforts brought about significant outcomes. We achieved full transparency regarding costs, headcount and the technologies in use, as well as pinpointing inefficiencies in processes throughout the Content Supply Chain. These insights led to the identification of "speedboats" – quick-win initiatives aimed at immediate value delivery. This project set the stage for ongoing efficiency improvements, a standout example of how strategic focus and detailed analysis can drive impactful results.

Getting started

Optimising by following our Content Supply Chain approach represents a significant transformation. It is crucial to identify value drivers that demonstrate business impact. Breaking down the process into manageable steps, each one with a clear business impact and clearly prioritised, will enable organisations to achieve quick wins and demonstrate the overall potential of the concept. Based on our experience, we recommend starting the Content Supply Chain journey with the following approach:



1 Understand today

Begin by reviewing and assessing the content management setup to gain insights into the overall maturity and company-specific requirements. The main outcome of this phase is a common understanding of the current processes, gaps and pain points. These insights should be translated into a clear and robust strategy that lays out the approach to be used for transforming along the Content Supply Chain. This phase requires the involvement of key stakeholders from Marketing planning, content creation, campaign management, and data and analytics.

2 Rethink tomorrow

The initial assessment and Content Supply Chain strategy are cornerstones for envisioning the future. The primary objective of this phase is to define a target vision that is aligned across the organisation, broken down into small, actionable use cases. The key outcome is the selection of the most valuable and important use cases, prioritised based on business impact, implementation effort, and technical feasibility. Identifying quick wins that will deliver immediate business value and ROI is critical for gaining the support and appreciation of marketing leaders and budget owners, ensuring the long-term success of the Content Supply Chain transformation.

3 Lay the foundations

With the use case roadmap established, conduct a detailed analysis of the business and technical capabilities required to plan, implement, and execute these use cases. It is crucial to prioritise these capabilities in line with business objectives. Incorporating learnings from past use case implementations will help to identify requirements more quickly, and to mitigate risks and potential challenges during execution.

4 Realize business value

Guided by the business capabilities, organisations can start to realize business value by implementing the use cases. Depending on the outcomes of the previous phases, these use cases may have organisational, technological and process components. The groundwork laid by identifying the current maturity, organisational requirements and lessons from past implementation really pays off at this point, as these factors determine the project structure (agile or waterfall) or whether a tech vendor needs to be selected.

This structured four-step approach makes it easier to take a holistic approach towards the Content Supply Chain, integrating business, organisational and technological perspectives to stay ahead. Starting now is vital to prepare for the future, as rapid advancements in GenAI are driving the need for change. Mastering this transformation not only enhances the efficiency of businesses, but also provides a significant competitive advantage, putting organisations in a position to thrive in an increasingly dynamic market.

Get in touch!

Would you like to get your content supply chain started? Then get in touch now – PwC is happy to advise you and work with you to develop all measures to achieve the best possible effect with your customers, even under difficult conditions.



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