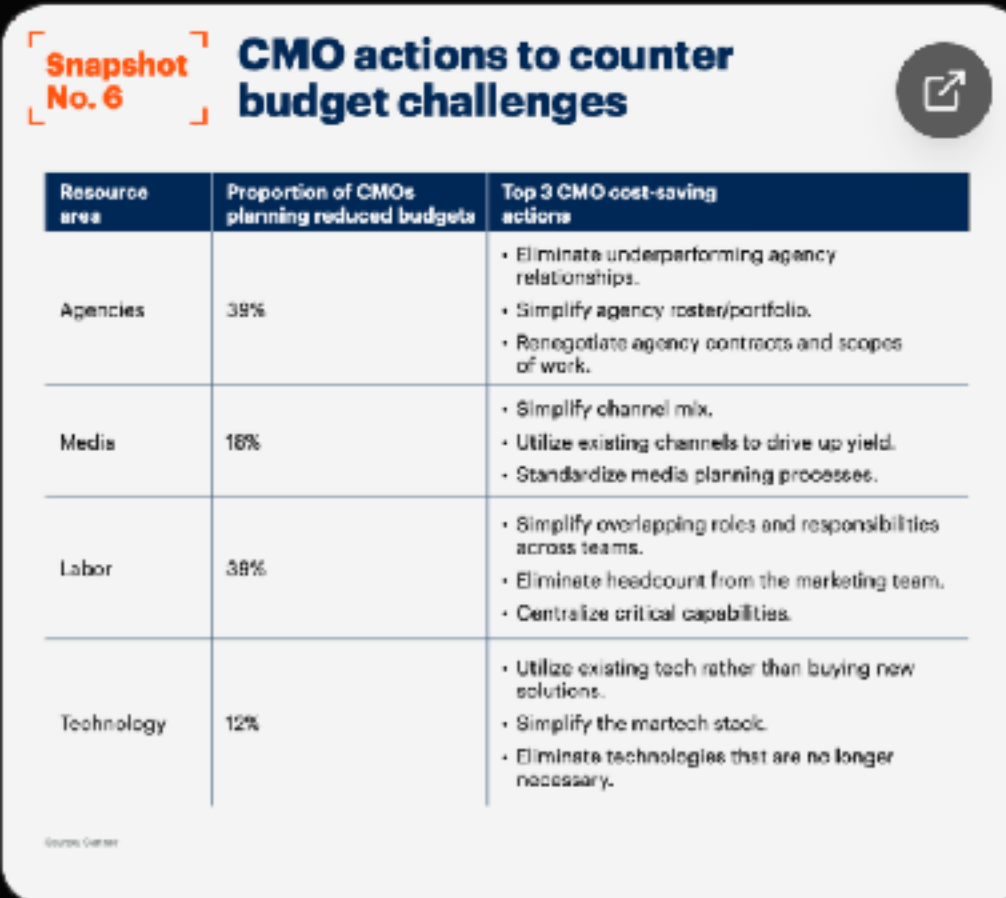


tied and frank

The Great Creative Deconstruction



Während der Druck steigt,
werden Marketing-Teams kleiner,
Entscheider unsicherer,
Agenturen kämpfen um das Überleben.

Der **Rotstift** diktiert die Strategie.

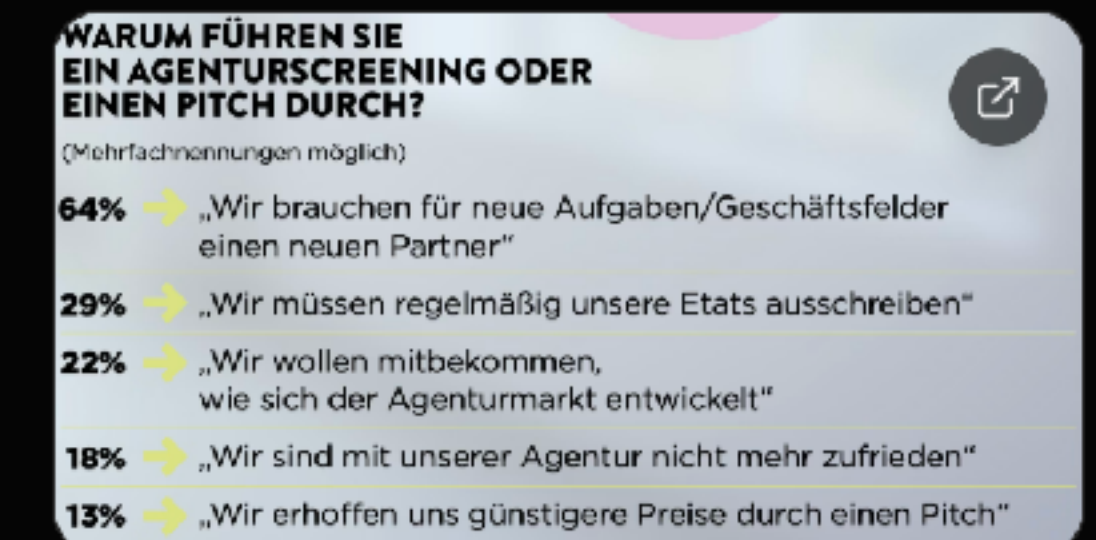
Und was einmal Partnerschaft hieß,
ist heute **Procurement**.



Die Anforderungen durch Medienfragmentierung,
KI und Wettbewerb steigen.

Bei sinkenden Budgets schaffen Sie es kaum,
dem gerecht zu werden.

Ihnen fehlt nicht nur Budget und Personal,
sondern auch ein echter Partner.



Where do we stand
today?

Omnicom to cut 15,000 jobs as media merges smoothly, advertising doesn't



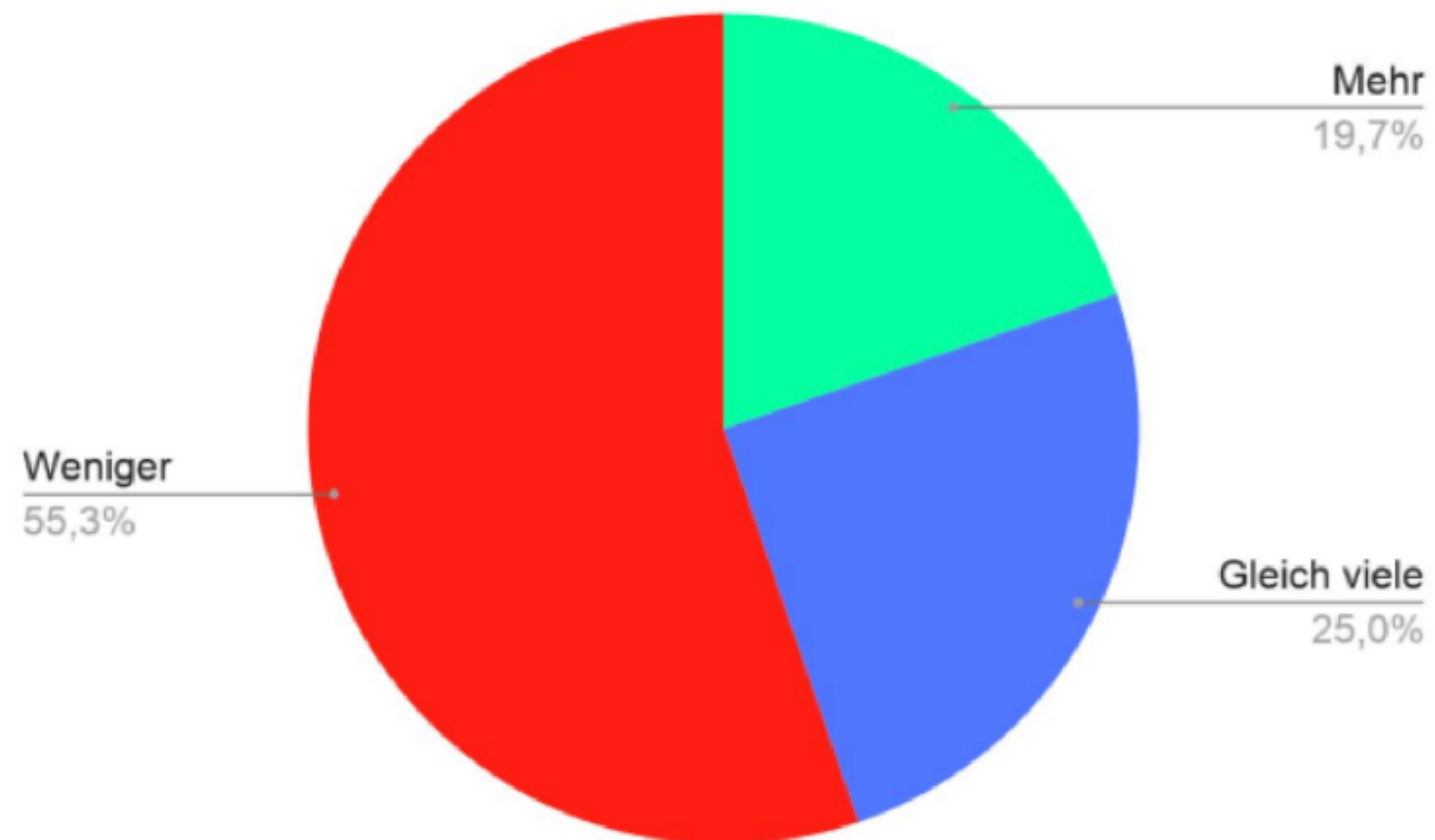
George Tannenbaum • Follower:in

14 Min. ...

Founder of GeorgeCo., LLC, a Delaware Company. Former Ogilvy Copy ...

Since 2017, WPP has "grown" from 202,000 people to about 98,000.

Festangestellte im Vergleich zum Vorjahr



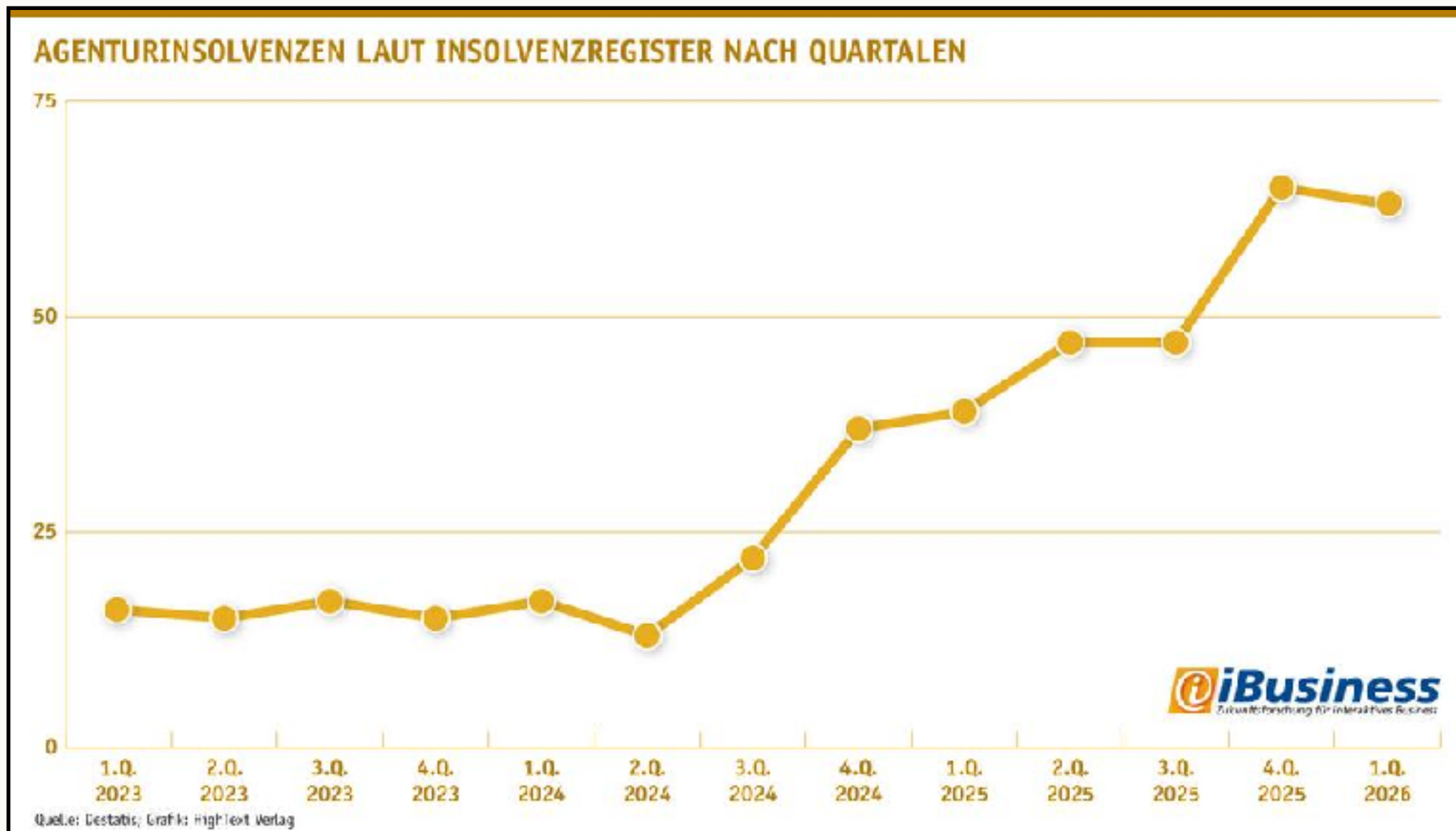
**Neues GWA KI-
Whitepaper: Ein
Kahlschlag bei
Agenturjobs ist nicht zu
befürchten**



tied and frank

110+

reported new agency launches in the
marketing sector within two years



PRESENCE

MAISON
ACME

everbrand.

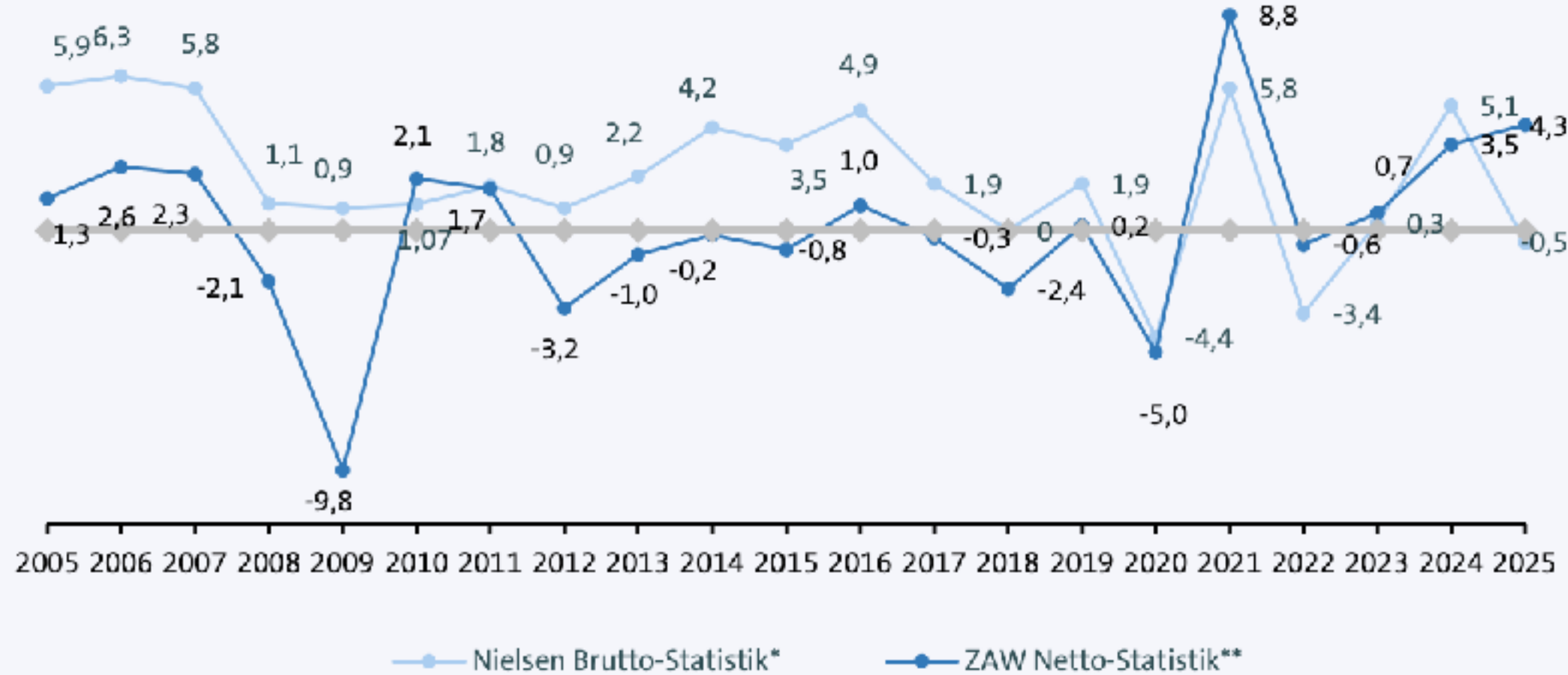
CIRCUS
RAMEZANI

the fitter

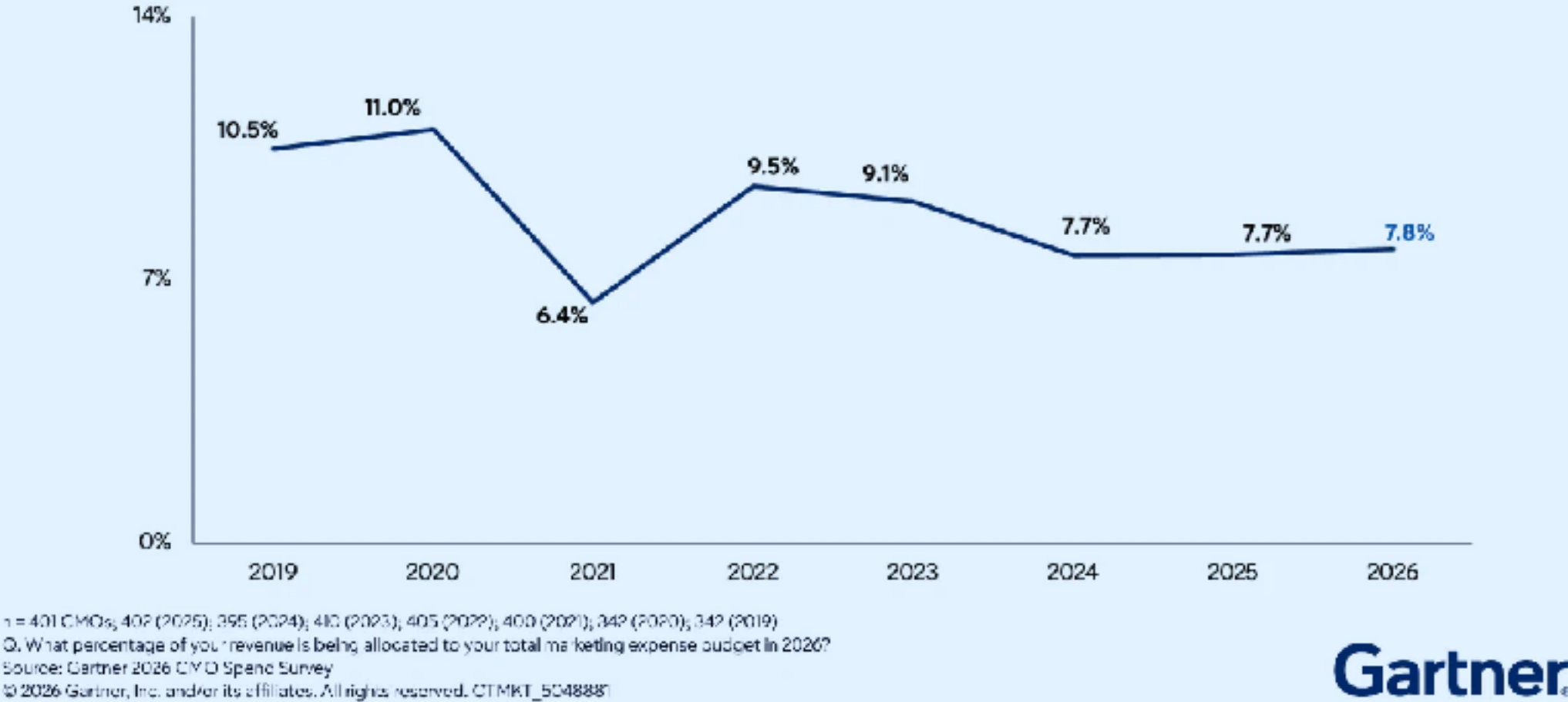
The Ranch®

**Management Buyout:
Warum RYSM wieder
unabhängig sein will**

Abbildung 1
Wachstumsraten des Werbemarktes in Deutschland 2005 bis 2025***
in %



Marketing budget as a percentage of total revenue (2019-2026)
Mean percentage of company revenue shown



Gesamtergebnis



FRAGE 6 · INSOURCING
Planen Sie, durch KI künftig mehr Marketing-Leistungen intern abzudecken?



HORIZONT

TEILEN

LOGIN

NEUE MARKENKAMPAGNE

Leibniz arbeitet künftig ohne Leadagentur

von Marco Saal

Mittwoch, 16. September 2026



Amir Kassaei  • 2.

Founder/ Investor/ Author/ Speaker/ G.O.A.T. aka K.O.C.

Es ist vorbei.

tied and frank

~~Crisis~~

tied and frank

AN INDUSTRY MOVING AT TWO SPEEDS

”*We have agencies with a 50 percent EBITDA margin and agencies close to insolvency. It is not the market, it is how they are run.*“

Daniel Pannrucker, M&A Advisor 2026

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Deconstruction

01

Why do we still invest in marketing going forward?

Impact level

01

Why

Impact

02

What will marketing deliver in the future?

Action Level

01

Why

Impact

02

What

Action

03

How will
we work
together in
the future?

Process and Culture Level

Why we do Marketing

3%

of CMOs can explain more than 50% of their marketing spend through MROI.

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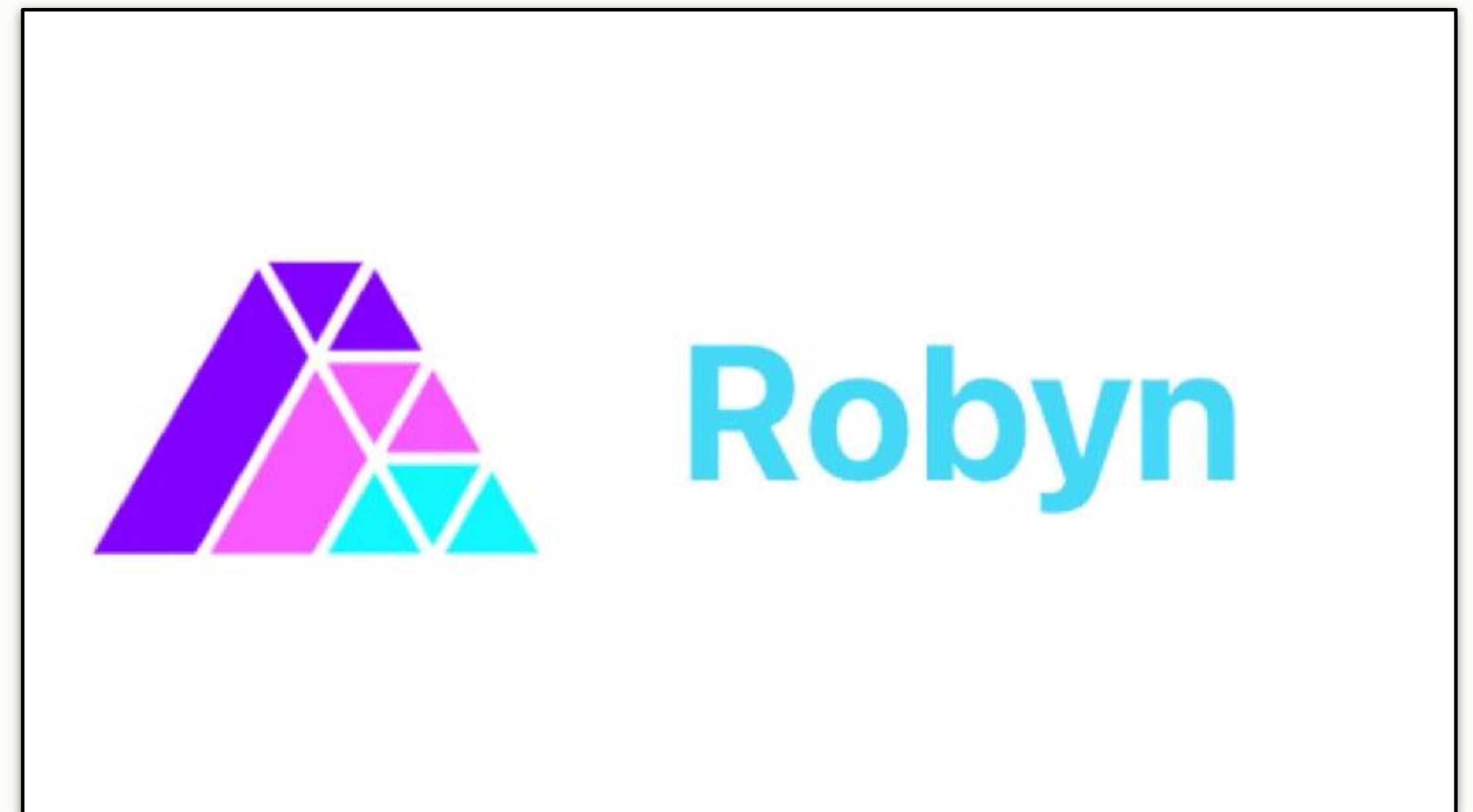
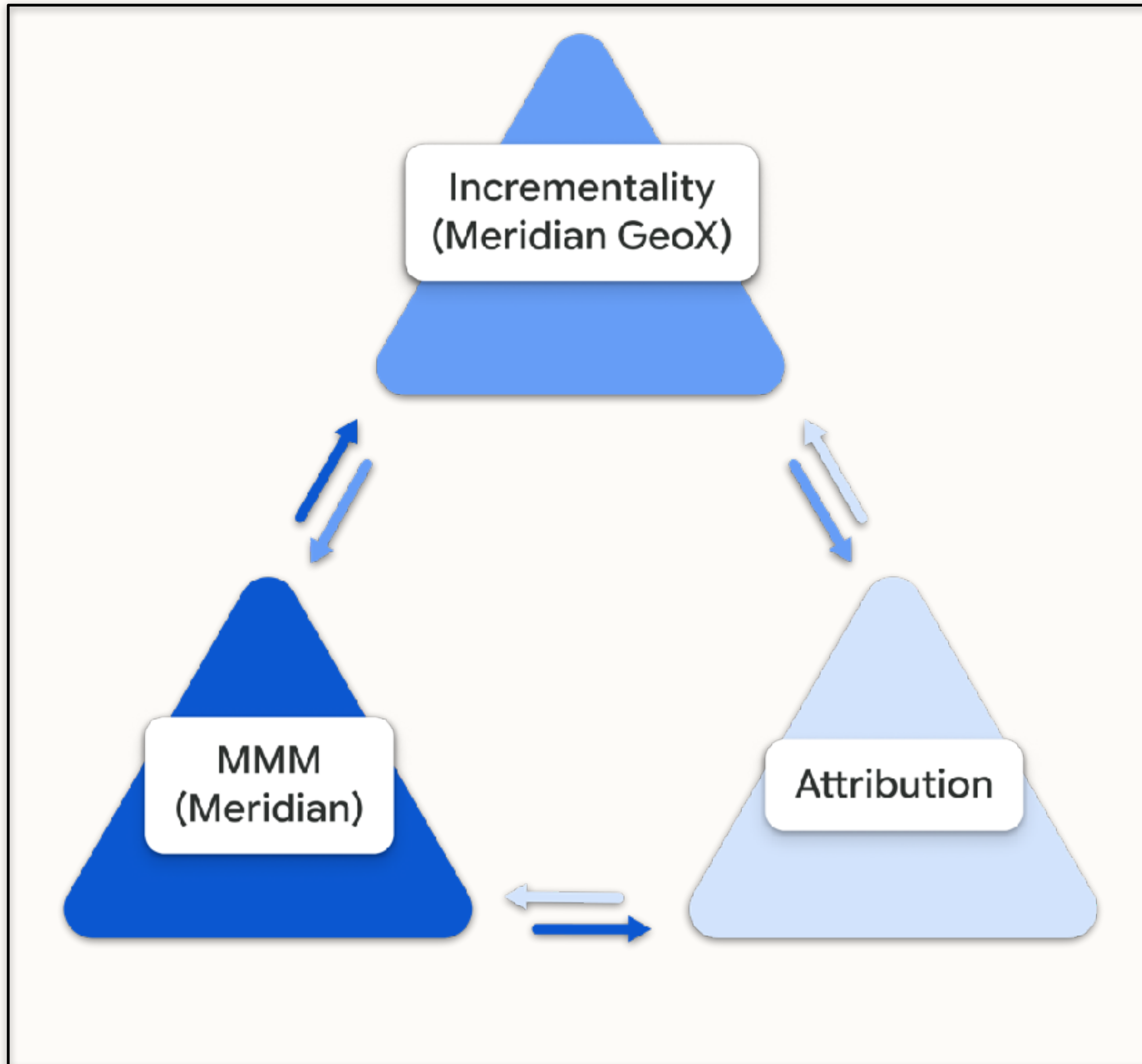
Waste

Faith

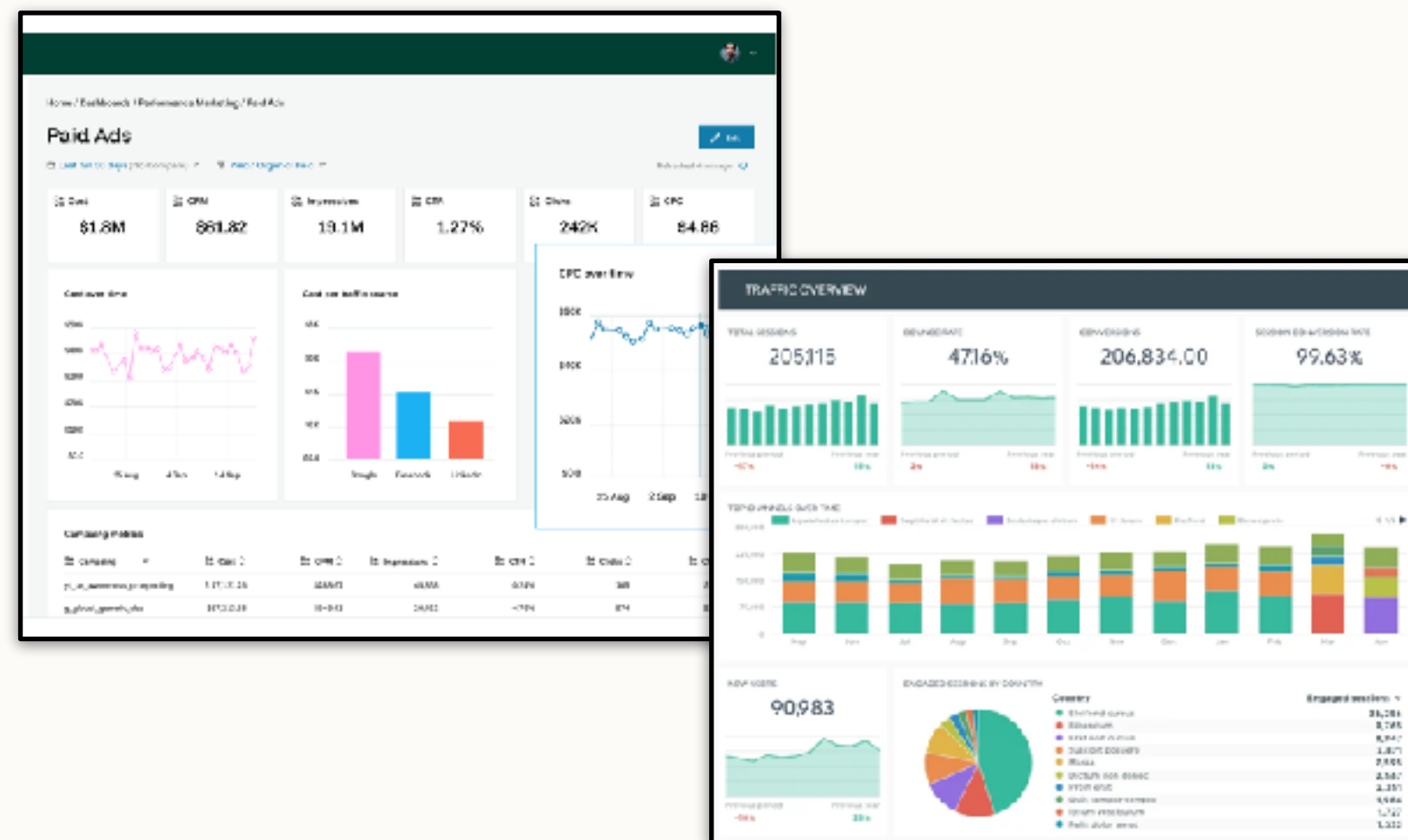
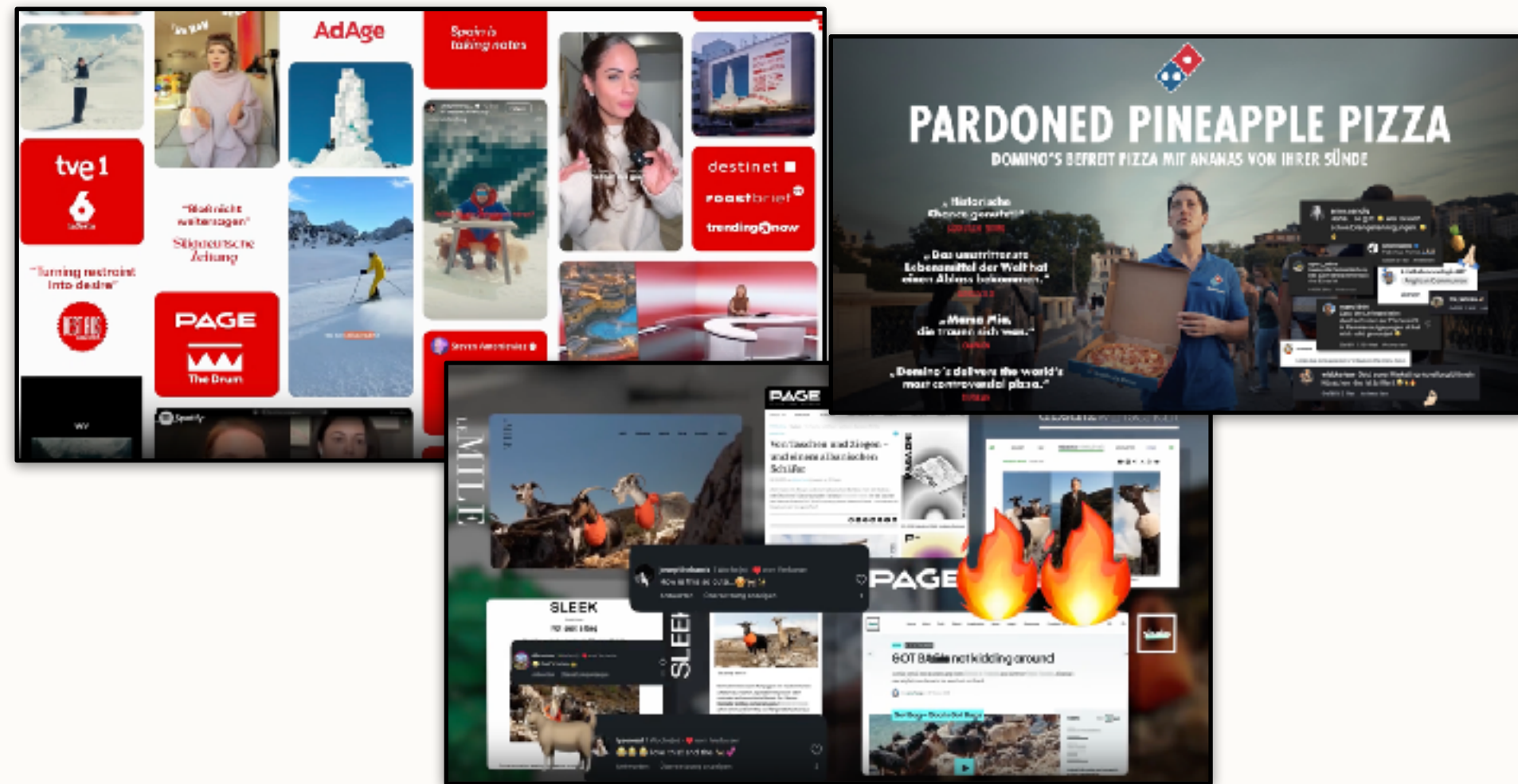
”Half the money I spend on advertising is wasted; the trouble is I don't know which half.“

John Wanamaker, c. 1900





tied and frank



„In brand marketing only costs get planned, there are no other planning figures.“

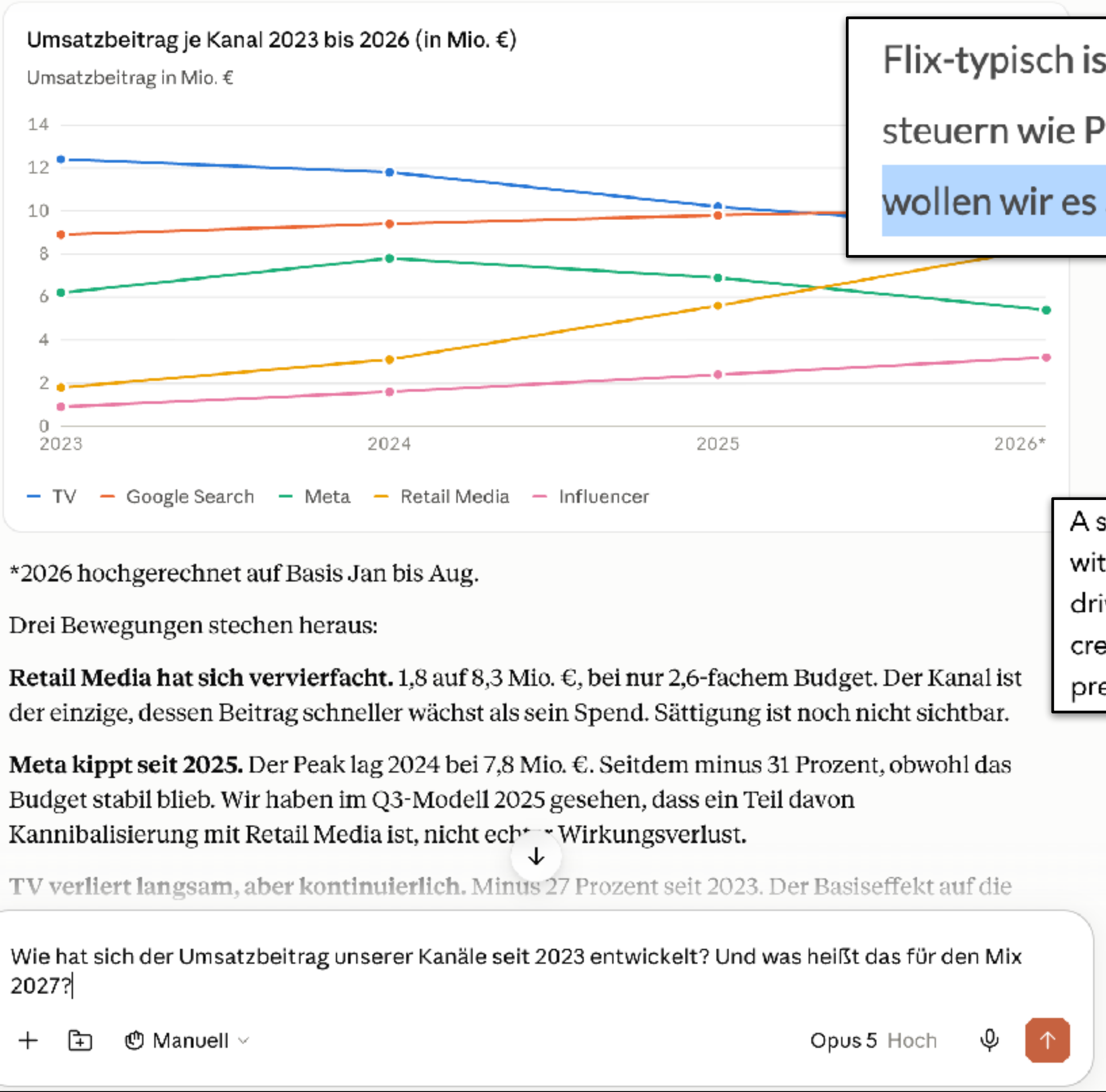
CMO, large corporation

NETFLIX

The first component is continuous model refresh. Netflix's marketing mix models do not operate on the quarterly batch cycle that defines most enterprise MMM programs. **The models ingest data continuously and update estimates on a weekly basis.** This is a meaningful engineering investment. It requires automated data pipelines with quality monitoring, model architectures designed for incremental updating, and validation frameworks that can distinguish genuine signal changes from noise in the weekly movements. None of this is exotic technology. All of it requires sustained engineering commitment that most measurement functions have not received.

The second component is always-on experimentation. **Netflix runs incrementality experiments continuously rather than as occasional projects.** Geo-based holdouts, audience-level tests, and campaign-level experiments operate on a rolling calendar, with each experiment feeding calibration data back into the models. The experiments are not special events requiring executive approval and months of planning. They are a standing capability with established protocols, pre-approved designs, and dedicated analytical capacity. The result is a continuous stream of causal ground truth that keeps the models honest.

The third component, and the one most organizations miss entirely, is decision-synchronized delivery. **Netflix aligned its measurement outputs to the actual cadence of marketing decisions.** Budget adjustments, campaign optimizations, and channel allocation shifts happen on weekly and monthly cycles at Netflix, and the measurement function delivers findings on the same cycle. The measurement arrives when the decision is open. This sounds obvious. Almost nobody does it. Most measurement functions deliver on the cadence the model runs, not the cadence the decisions happen, and the mismatch between the two is where measurement value goes to die.



Flix-typisch ist dabei der Anspruch, Branding genauso datengetrieben zu steuern wie Performance Marketing. "Wenn wir Branding machen, dann wollen wir es auch gut messen können", betont Schlüter. Die Partnerschaft mit

A second example is the **Marketing Mix Modelling (MMM) Agent** - developed in partnership with PyMC Labs. While channel KPIs show what's happening, the MMM Agent reveals what truly drives results. The agent considers factors such as seasonality, promotions, distribution, and creativity, and provides recommendations with realistic, transparent ranges instead of false precision.



A system that makes the strength of marketing measurable, and therefore not only steerable towards better decisions, but finally visible again.

What we do

tied and frank





Morning! How can I help you today?

Create a product launch plan for our new onboarding feature



 Create document ↕

 GPT-5.2 ▾



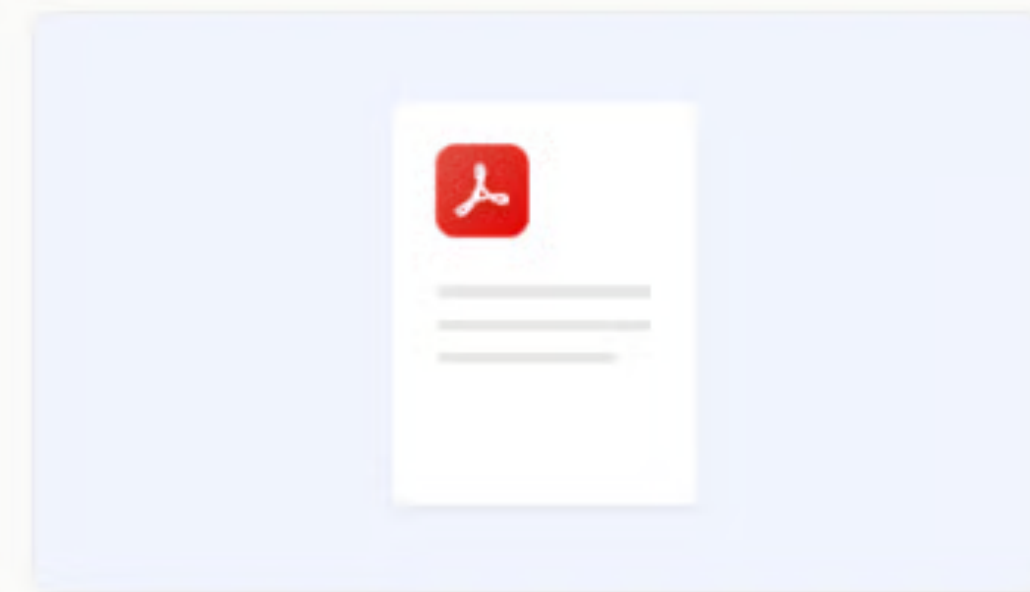
Choose format



Document



Word



PDF

Martech-Déjà-vu

Big promises, big bills, little delivered.

Among ISBA members overall, the use of AI is increasing with around two-thirds (65%) of respondents using Gen AI regularly in their day-to-day job, yet only a minority of 28% feel it has meaningfully changed their working day.

In terms of results, a minority (14%) report significant or transformational impact on advertising results, while two-fifths (40%) report moderate impact, three in 10 report minimal impact, and a one in 10 report no impact.

ISBA’s director of agency services, Nick Louisson, says the gap between use and it driving impact is “one of the most interesting” aspects of the research.

BUSINESS INSIDER

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AMZN

▼ -2.32%

META

▼ -0.53%

TSLA

▼ -1.52%

DOW JONES

▼ -0.84%

NASDAQ

▼ -2.38%

S&P 500

▼ -1.1%

ADVERTISING

The \$160 billion martech industry can't answer a simple question: How does it make its customers money?

By Lara O'Reilly

+ Follow

The image shows a large, thick red line graph on a green background. The graph starts high on the left, trends generally upwards with some fluctuations, and then drops sharply towards the right. A hand is shown holding the end of the red line. Below the hand, a small figure of a person is running, carrying a yellow bag. The overall scene suggests a sense of urgency or a race against time, possibly representing the challenges of the martech industry.

Master1305/Getty Images

100 %

of agencies use generative AI

99 %

expect increasing usage

81 %

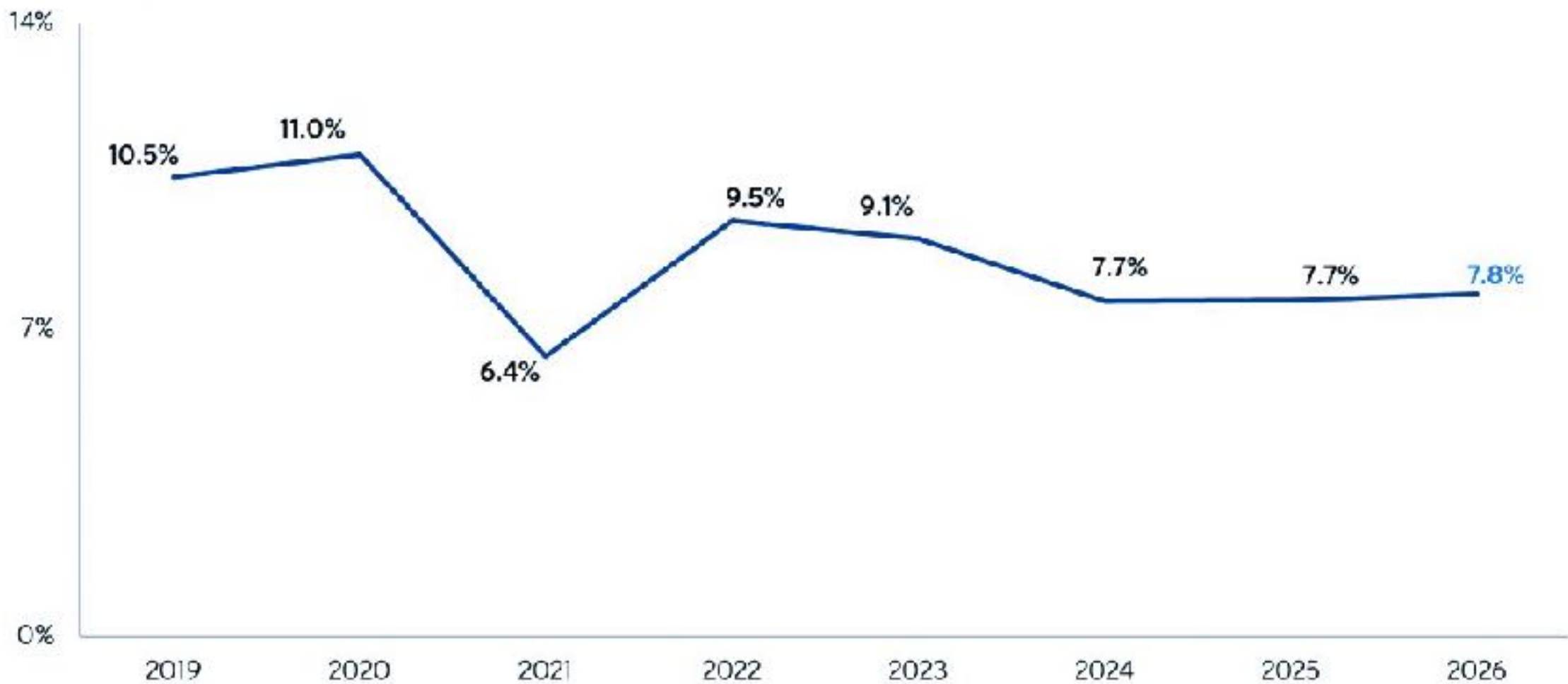
use AI tools

16 %

consider themselves
AI-ready

Marketing budget as a percentage of total revenue (2019-2026)

Mean percentage of company revenue shown



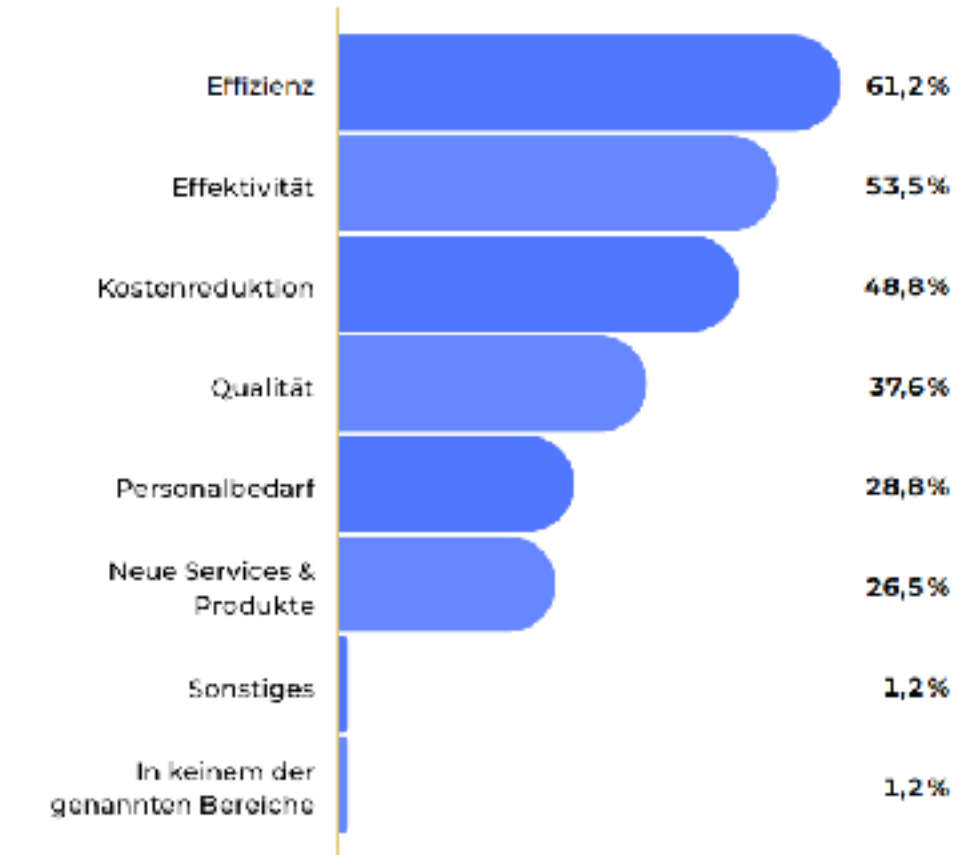
n = 401 CMOs; 402 (2025); 395 (2024); 410 (2023); 405 (2022); 400 (2021); 342 (2020); 342 (2019)
Q. What percentage of your revenue is being allocated to your total marketing expense budget in 2026?
Source: Gartner 2025 CMO Spend Survey
© 2025 Gartner, Inc. and/or its affiliates. All rights reserved. CTMKT_5040861



FRAGE 4 • NUTZENHEBEL

In welchem Bereich sehen Sie den größten Hebel durch KI im Marketing?

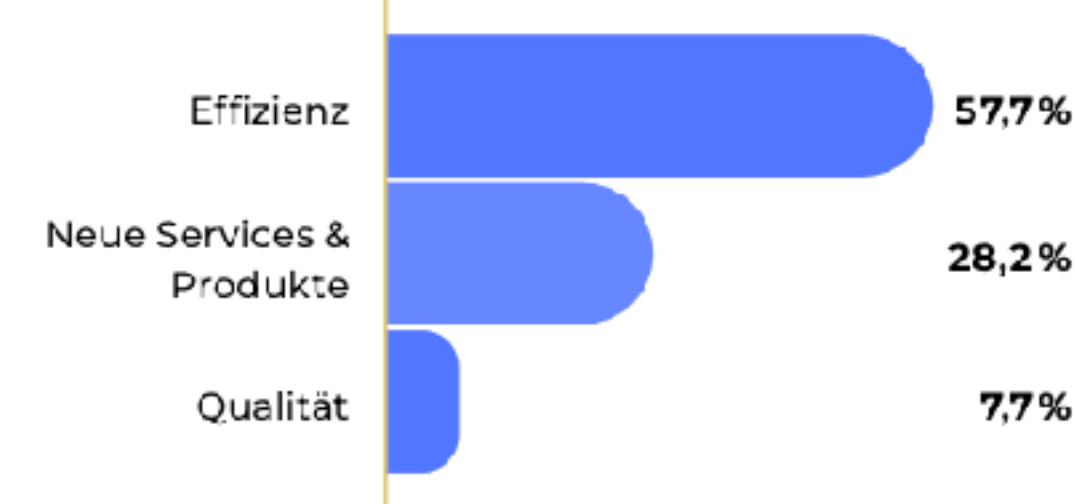
Gesamtergebnis



FRAGE 6 • NUTZENVERSPRECHEN

Wo sehen Sie den größten Hebel durch KI in Ihrer Agentur?

Gesamtergebnis



A group of chickens, including several brown hens and a few white and black chickens, are scattered across a lush green grassy field. In the background, there are several thin, bare trees. A semi-transparent white rectangular box with rounded corners is centered over the image, containing the text. The text is in a large, black, serif font.

„No time to build the
fence, because we have
to catch the chickens.“

Marketing lead, large corporation

Context systems are the future.

“Organizations that fail to adopt comprehensive context structures — supported by a robust data layer — will perpetuate data inefficiencies and face heightened financial costs, as well as legal and reputational damage.”

“Context with semantic coherence will become a cost-control and trust strategy, not a nice-to-have.” – Rital Sallam, Distinguished VP Analyst at Gartner

AI agents need to understand the context inputs in each step of the agentic workflow to deliver accurate responses at an optimal cost.

Gartner predicts that by 2027, organizations that prioritize semantics in **AI-ready data** will increase their agentic AI accuracy by up to 80% and reduce costs by up to 60%.

Phase 1 **Testing**

Phase 2 **Rollout**

Phase 3 **Systems**

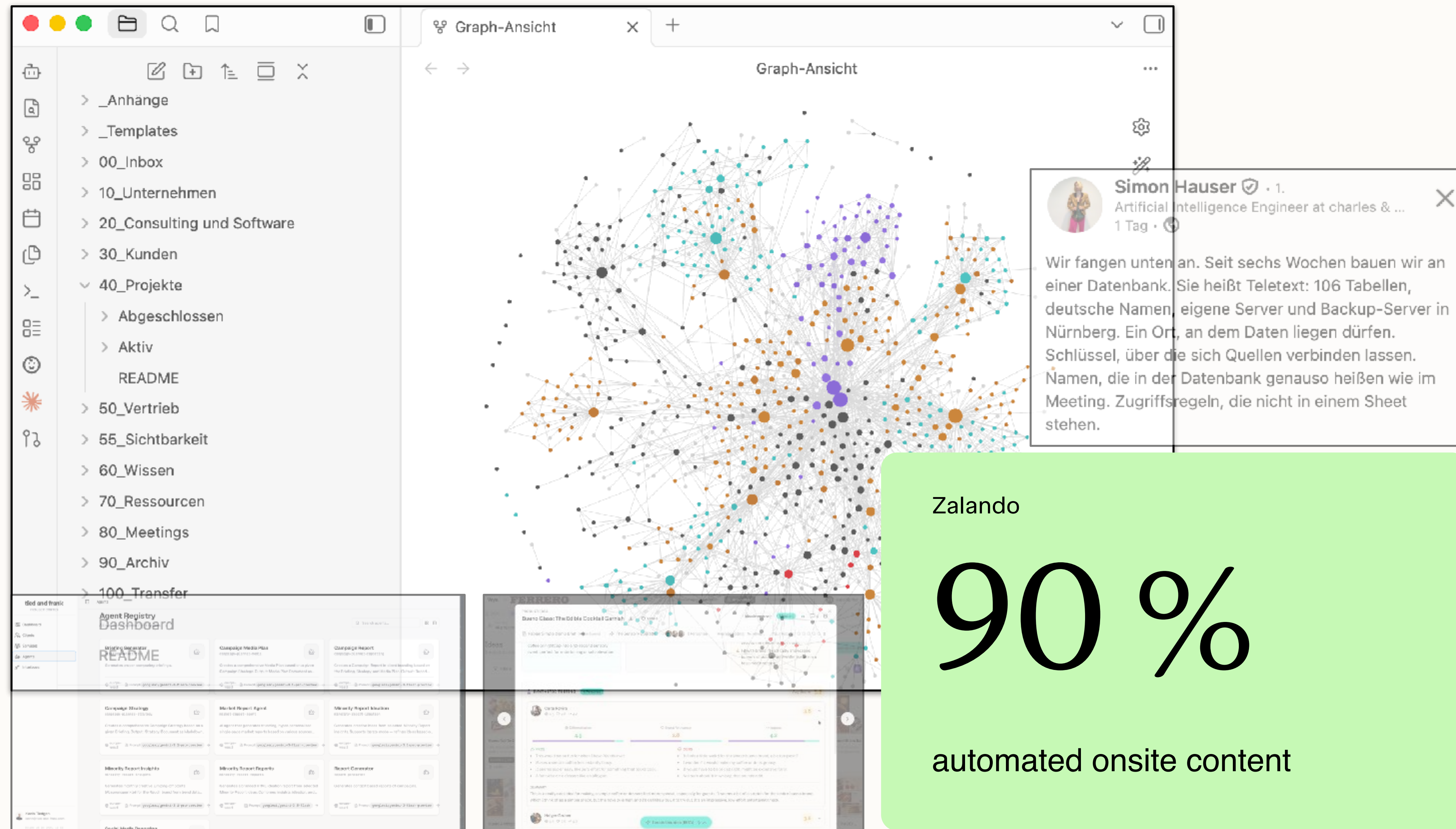
tied and frank



„Suggestions on how to make processes more efficient rarely come from the agencies. The production plan still runs through Excel, and the assets arrive as 95,000 links.“

Brand Manager, large corporation

tied and frank



Marketing today is shaped by scrubbing assets,
filling Excel sheets and sitting in meetings
without purpose.

If we get it right, AI can lead to a more
humanistic marketing.

tied and frank

How we do it

80 %

of companies want to deliver more
marketing services in-house

8 %

expect a smaller agency role

39 %

expect higher strategic importance

Fundamental shift in requirements

„Human oversight remains. The sweet spot between accountability and speed matters.“

McKinsey



DISCLAIMER

Do not use Jev if you enjoy waiting seconds for responses or paying for words you never asked for. Side effects may include fewer retries, fewer parsers, fewer broken schemas, and intelligence running inside every software loop. Your software may begin moderating every message, routing every ticket, reviewing every document, and making millions of background decisions that were previously too slow or expensive to automate. Entire software categories may be rewritten in the process. As costs fall, usage may increase dramatically. Ask your developer if your industry is ready.

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Describe your ideal trip, and let Google Flights find the best deals for you

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SECONDS ELAPSED

One way
Zürich
London
20 September
Search flights

Choose. Act. Repeat.
0 actions executed

median decision latency

github.com/browser-use/jeu-ultrafast

”Everyone can do
marketing now.
So who gets to say no?”

Colin Fleming, OpenAI

New Roles and Profiles

Creative / media technologist as the agency's future counterpart

sample, anonymised

„Predictive Media Planning, Agentic Media Allocation, LLM Visibility“

E.ON

Chief AI Officer appointed

Weeber

„The rise of the chief integrator“

PR Daily

The new role of the agency:

Counterpart, supporter,
source of orientation.

Die größte Hürde ist
der Mensch

Fehlende Kompetenzen und Talente (**66,7 %** →) stehen dem effektiven Einsatz von KI am stärksten im Weg, gefolgt von rechtlichen Unsicherheiten sowie Zeit- und Ressourcenmangel (je **50,0 %** →).

The Reason Only 9% of CMOs Have Cracked AI Isn't a Mystery. It's Operations.

[Survey](#) of 500 marketers recently uncovered a startling reality. While 69% of marketers strongly encourage AI use, 43% of marketers have still received no formal training, and only 9% have fully integrated AI deeply into their workflows. This despite a plethora of press,

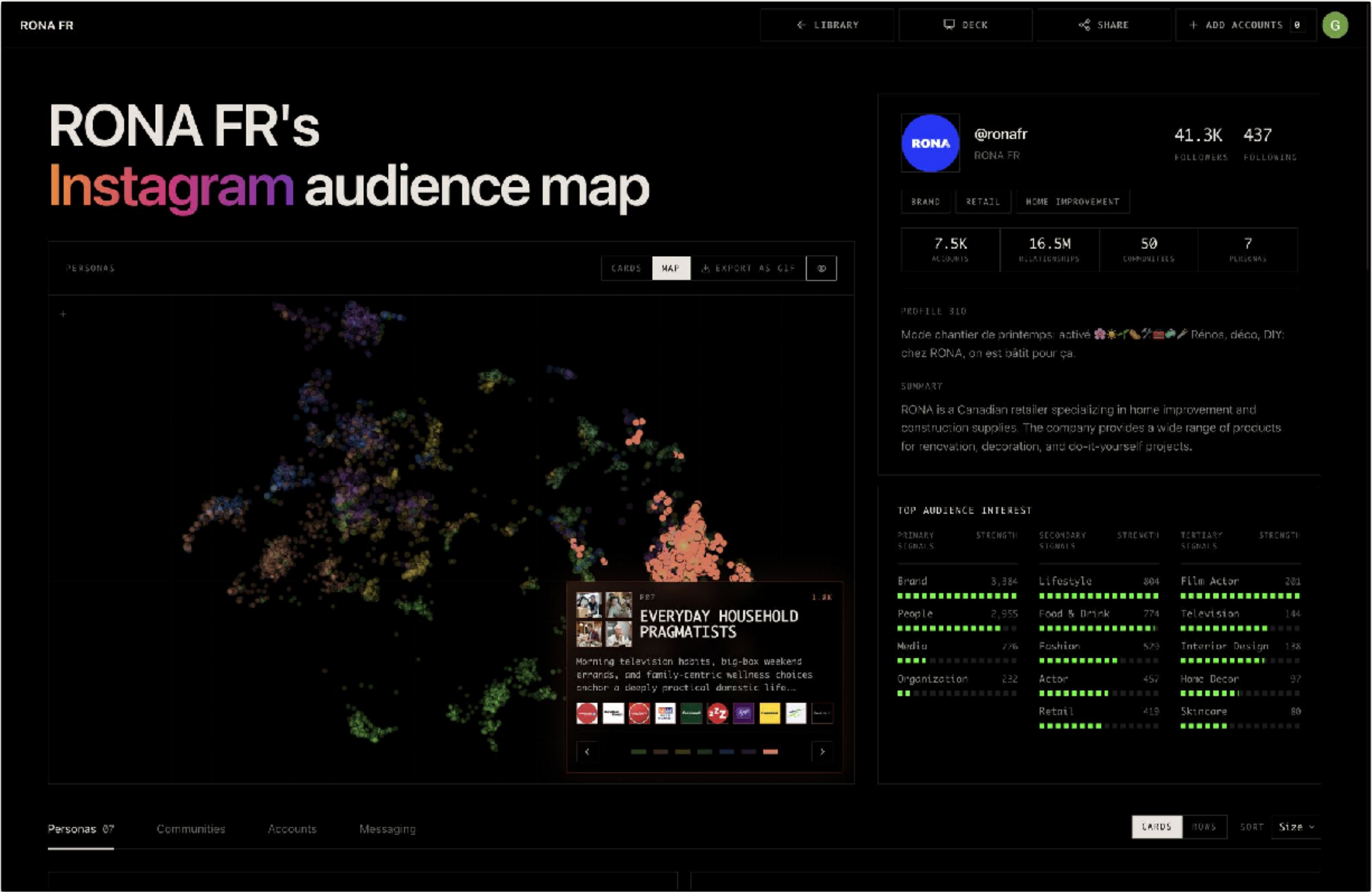
pronouncements, and earnings reports signaling that AI is going to change the way we do business!

The disconnect here isn't a simple skills or responsibilities gap. Instead, it's an under-resourced, unmanaged mandate meant to satiate investors, not solve real marketing problems. Today's challenge has less to do with the technology's availability or accuracy, and everything to do with putting more foundational operational rigor around AI within marketing organizations.

82 Prozent der Beschäftigten verbringen viel Zeit damit, Arbeit zwischen Teams oder Systemen zu koordinieren. **81 Prozent** schieben regelmäßig Informationen zwischen Tools hin und her. Führungskräfte verlieren dadurch bis zu einem Tag pro Arbeitswoche. **Nicht an schlechter Arbeit – sondern an Reibung.**

- The coordination cost: Fast work creates slow work downstream. One person's quick output can turn into a multi-person coordination effort. 65% of workers say AI creates more coordination work between team members, and this climbs to 90% among super productive workers.

- The rework loop: AI-generated work often comes back around for another pass. The time saved upfront can be lost when people have to redo or manually repair the output. 55% of workers and 68% of super productive workers have had to completely redo work that AI started. Similarly, 34% of workers and 47% of super productive workers report that even automated work processes still require manual fixes and workarounds.



Illustrative example of a system by a social agency, Hamburg

The Rise of the Consulting Obelisk

In response, we propose that a new model is emerging: *the consulting obelisk*. Unlike the traditional consulting pyramid, which depends on a wide base of junior consultants, the obelisk represents a tall, narrow model: fewer layers, smaller teams, and more leverage at every level. Instead of relying on sheer scale, this model is built around three human roles:

- **AI facilitators** are early-career consultants trained in the latest AI tools and data pipelines. They design and refine AI-driven workflows, helping teams generate insights at speed. This role offers a new kind of apprenticeship that emphasizes technical fluency and applied judgment from day one.
- **Engagement architects** are experienced consultants who lead projects. They help define the problems to solve, interpret AI outputs with human judgment, and translate them into actionable strategies. They orchestrate how work gets done and adapt as conditions change, while ensuring that insights turn into results.
- **Client leaders** focus on the long game. They cultivate deep, trusted relationships with senior executives, help them make sense of change, and stay close enough to advise them on how to stay ahead of disruption.

”*You have to describe the
present and take away
the fear.***“**

Sven Dörrenbacher, AI Advisor

THREE CALLS TO ACTION

01

Marketing with results

"Leaders are the organizations that ensure measurement reaches the decision, every time."

WFA / Ebiquity

02

Marketing with system

„Without SOPs nothing scales via AI“

GWA Operating Model 2029

03

Marketing with humans

76% have adjusted their positioning; 47.4% plan new roles.

everii

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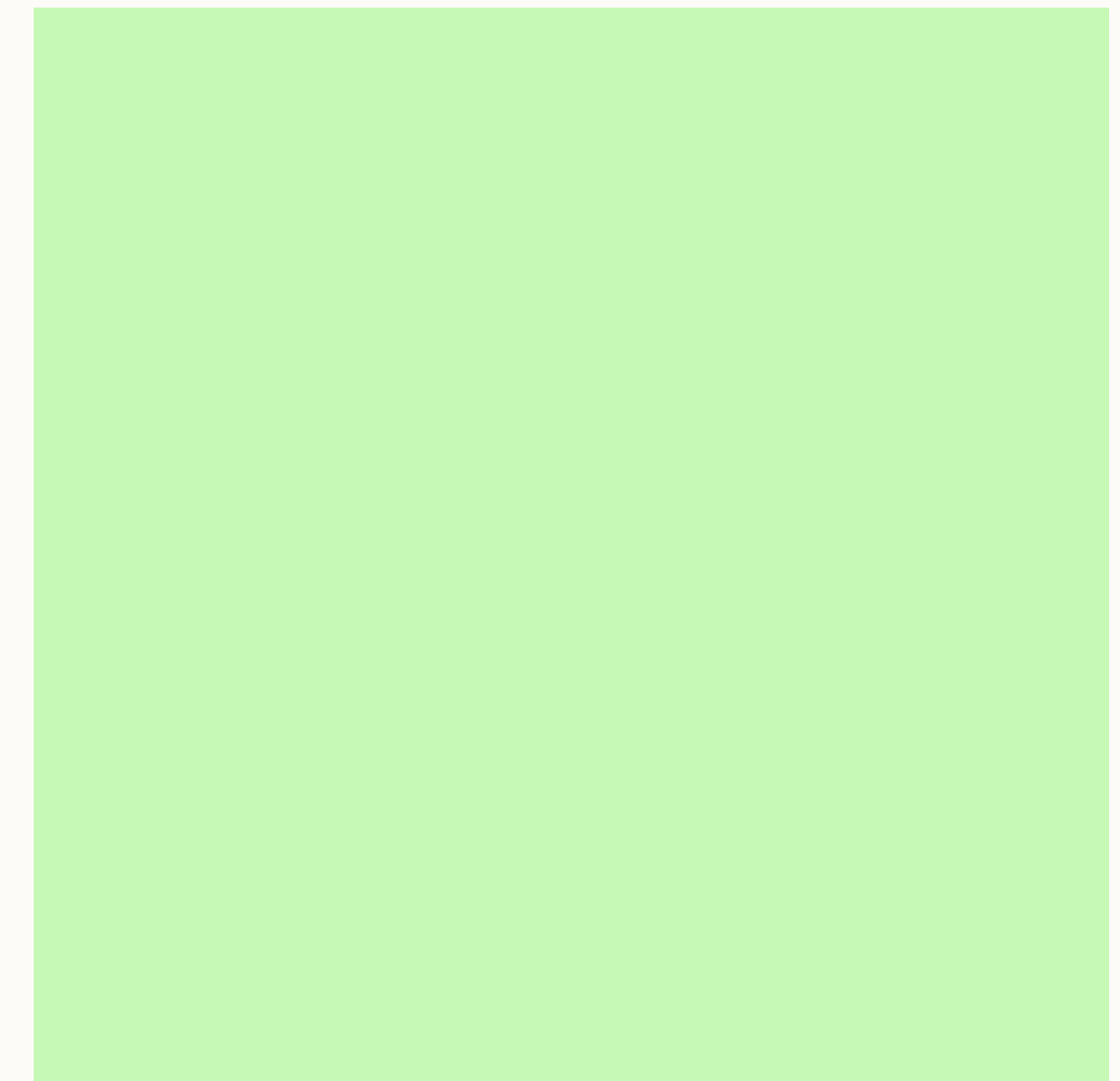
Thank you.

And have fun doing it

Kevin Tiedgen

kevin@tied-and-frank.com

tied-and-frank.com



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