



Book Review

New age strategies for transition to phygital world of Marketing 5.0

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1.0 Introduction

1.1 Overall book outline/Abstract

Today, the world is moving towards a more digital and virtual reality. Smart phones, wearables, smart glasses have become a norm and basic necessity (Jorge. A, et. al. 2019). Gen Z and Gen Alpha, by default rely on Wi-Fi and smart phones for day-to-day topics; being online and available is the trend today. To top up; the advent of Artificial Intelligence (AI), Internet of Things (IoT) as well as advanced sensing technologies have opened new doors for marketing. With technology playing such a big role in life of the common man, the book Marketing 5.0 rightly points out the key aspects that cannot be overlooked for a company or brand to be successful in the market. The book draws parallels with the statement by Tom March which appropriately mentions that WWW in today's context stands for "Whatever Wherever Whenever" highlighting on demand 24x7 requirements of today's generation (March,T. 2020).

1.2 Who this book is for

The book systematically walks through modern day marketing challenges and dwells into suggestive approach on how advanced technology, AI can be used in a collaborative and congenial way to expand business footprint to wider horizons (Haleem, A, et.al, 2022). The overall flow and content coverage of the book makes it a good reference for business marketing professionals who are struggling to use technology to their advantage. With suitable examples at each entry and exit points, the book touches upon the realistic scenarios of how companies

and brands are tapping technology to their fullest advantage. With newer technologies and their ease of availability, businesses are trying various novel opportunities to reach out to customers (Grewal,D. et. al, 2020).

1.3 Importance and focus of the book

The book sheds light on three conflicting situations that marketing professionals are navigating today. First they have to serve an entire generation from 1930s to 2020 and onward; secondly, the blend of traditional and digital topologies that has caused a potential divide and third, the widened gap between classes to masses with middle class almost disappearing, that has brought in distinct set of challenges. The authors point out the famous M-Curve distribution overriding the bell curve, depicting a polarised society with vanishing middle class (Ouchi, W.G.1984). The authors also highlight enhanced customer experience by appropriate use of technology for marketing (martech) to make the traditional 4P approach (Price, Place, Promotion, Position) an amalgamation of physical and digital or "phygital".

The book advocates to outsource high level customer service zones to digital technologies such as chatbots or AI based responders wherein machines can smartly filter noise and develop prospective leads. Once the leads are set, the human touch and personalisation comes into play. Analysis of information by smart use of AI to generate personalisation is the right move (Arias, A.V. et.al., 2024). Marketing 5.0, although based mostly on US market perspective, it is a must read to have a systematic understanding of the latest technologies that are available today and how businesses, brands and marketing professionals can tap them to their advantage. A right balance between man and machine opens the door to marketing success (Marr, B. 2022). Overall, the book gives a very positive outlook of emerging technologies and their applications to strategic marketing.

1.4 About the book authors

With three authors for this book led by Philip Kotler, a PhD from MIT, USA, a visionary, a marketing guru; he is rightly credited with the title of "father of marketing" (Gunther, R.E. 2009). He has published a plethora of books on marketing in atleast 25 languages with most of them sought after globally. Hermawan Kartajaya, an Indonesian has co-authored this book and is a co-founder of the Asia Marketing Federation. Iwan Setiawan, the third co-author has a rich experience in marketing consulting and is a prominent speaker worldwide. Published in 27 languages, the book gives a concatenation of traditional, emotional, spiritual and digital marketing approaches that is more relevant today.

2.0 Book content outline

2.1 General overview and organisation

A little over 200 pages, the book is cleverly divided into 4 parts that sequences through general introduction, marketing, challenges, new strategies and finally the new technology tactics to be leveraged upon. With a total of 12 chapters embedded within these 4 parts; the key chapters under part 4 are dedicated to the emerging and new technologies which are a must read to sum up the go to market tactics.

2.2 Topic and chapter arrangements

The introductory chapters of Part I talk about the transition of orthodox functional satisfaction methodologies (1.0) to emotional satisfaction (2.0) moving to a spiritual satisfaction (3.0) and gradually to a digital marketing methodology (4.0). With the comfort and availability of technology 24x7 in our hands today, businesses have to strive to go digital to stay relevant in the game. Weng (2024) accurately mentions about the evolution of digital marketing and how businesses are aligning to this evolution to stay relevant. It explains the thought process of 5 generations that businesses and brands have to factor in today thus spanning through the Baby boomers, Gen X, Gen Y, Gen Z and the upcoming Gen Alpha. The generation that individuals belong to dictates their potential to adopt technology (Choudhary, R. et al., 2024). It introduces the three potential divides that businesses are struggling to overcome namely generational, prosperity and digital.

These chapters also present a co-relation of each generation's ongoing life stages vis-a-vis marketing strategy alignments and such as baby boomers being in their final stage (on verge of retirement), Gen X in their fostering stage (decision makers), Gen Y in their forefront (executioners) while Gen Z/Alpha are just beginning their fundamental stage (digitally savvy consumers).

Part II focusses on explaining the polarization in the society across jobs, ideologies, lifestyles as well as markets. It appropriately uses an example from the movie "The Platform" which portrays this societal gap and brings out the darker side of sustainability. The role of inclusion and sustainability and its importance for growth of business is highlighted. With Corporate Social Responsibility being the norm today, a more human-centric approach is need of the hour. Customers appreciate and look up to the companies and brands that exhibit societal and environmental factors as their defacto standards. This in turn builds up loyalty and

long term relationships. As rightly pointed out by Shribman (2024), CSR has become a more strategic approach for sustainable business success rather than an obligation. This part also talks about the digital divide where the rich and premium consumers have most of the tech access while there is another part of society which is struggling to have even basic necessities. It advocates the benefits of AI to enable smart targetting, better product fit and better customer engagement. Social media marketing, content marketing, and personalisation, are key applications of AI to make technology more personal, social and experiential.

The key focus of Part III is to bring in awareness of the available technologies that can be used for marketing. It advocates that a digital readiness assessment to be done first as outlined in Figure 1.0, identifies and proposes ways to promote customer digital migration such as incentivization, remote work or personalization. It talks about open source, cloud computing, big data and the power of computing.

These technologies have come up as cost-effective modes of digital innovation to ramp up digital transformation of marketing and business (Panda, D.K. et al., 2024). To enhance customer experience (Cx) and expand digital outreach of brands, it proposes the 5A model to make customers aware, appeal, ask, act and advocate brand value. Finally this part compares human to machine modelling and proposes a shared responsibility between humans and machines. Both man and machine need to work hand in hand with humans using their wisdom and insights to filter out noise to take key decisions while machines to follow a Data-Information-Knowledge and Wisdom (DIKW) path to extract relevant inputs needed for decision making.

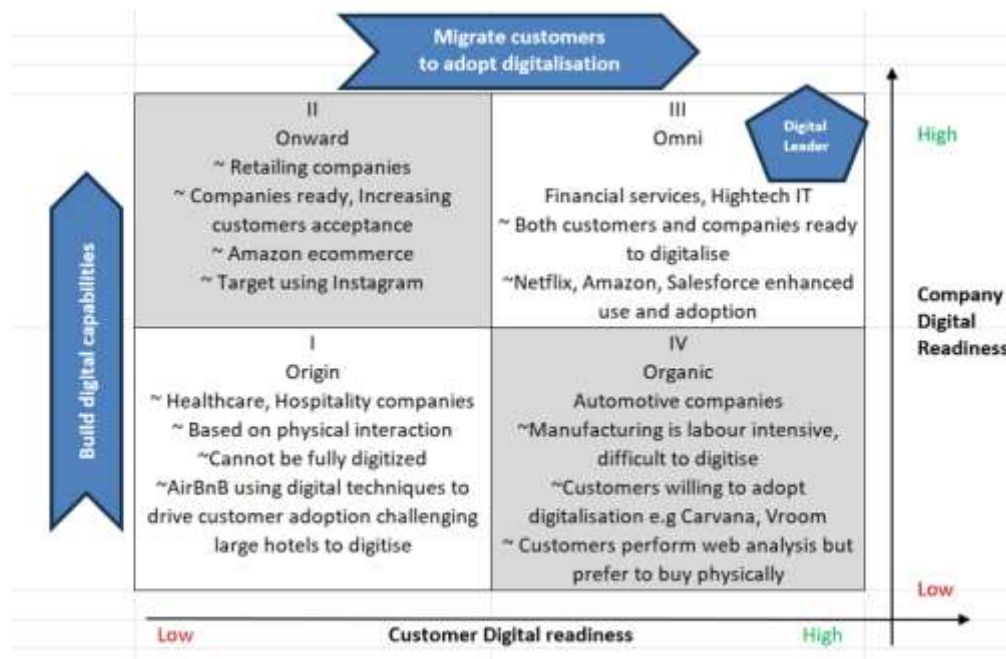


Figure 1.0 Digital readiness block diagram

Comprising of 5 chapters, part IV is the core focus of this book. It introduces various keywords and terms that can be used by marketers to broaden their skillset as well as to scale their boundaries. The initial chapters focus on use of data from social, web, point of sale, IoT, engagements as well as media to perform individual profiling. King and Forder (2016) rightly mention this profiling as fruits of data analytics. Concept of psychographic and behavioral segmentation are introduced which should be coupled together with traditional demographic and geographical targeting to reap technological benefits. Use of AI and machine learning models on historical data is advocated to bring in predictive analytics and modeling for a more

proactive marketing strategy. These methods and especially predictive analytic play a big role in predicting customer behaviour (Mujahir, 2024). There are chapters that introduce the three marketing strategies of new era such information, interaction and immersion using AI, IoT and external sensing techniques. There is an emphasis on using human-machine collaboration that defines the concept of

Intelligent Amplification where humans take decisions based on machine based computational prediction.

3.0 Interesting parts of the book highlighted

3.1 Interesting topics, keywords and marketing jargons introduced in the book

- 5 Generations – Baby boomers to Gen Alpha
- Customer experience (Cx) and Employee experience (Ex)
- 5As’ – Aware, Ask, Act, Appeal, Advocate
- 4Fs’ – Final, Fostering, Forefront, Fundamental
- 4O’s – Origin, Omni, Onward, Organic
- 5 Technology factors: Data driven, Decision driven, Predictive, Contextual, Augmented and Agile marketing
- 3Is’ of marketing strategy – Informative, Interactive and Immersive
- Psychographic segmentation
- Segments of one
- Geotracking, Neurotracking, Geofencing
- Social listening
- Product affinity analysis
- Recommendation engine
- Intelligence Amplification
- Cx has an expiry date due to social media trend adaptations
- VUCA – Volatility, Uncertainty, Complexity, Ambiguity drives agile concept

3.2 Critique

The advantage of this book lies in its simplicity and non dependency on its previous version 1.0, 2.0, etc. Although, marketing 5.0 portrays that it is a combination of strategies advocated in its previous versions of Marketing 3.0 and 4.0, however it can be read independently. The authors use real life examples to explain all the topics. This helps to provide an instant co-relation for the reader to understand the practical applications. The book rightly mentions about the usage of AI in collaboration with humans, as solo AI applications will not have the human touch aspect which is a basic trait of marketing. After all, people in the workforce should feel motivated to bring out creativity instead of blunt AI dependency (Liu, Y.et.al,

2025). The ironical firing of robot staffs in the renowned Japanese hotel Hen-na is appropriately used in this context to highlight over dependency on machines to save money by cutting down human capital (Shead,S. 2019). This book is an easy read

for a novice and 1st year marketing students who want to explore various technical flavours available for use in marketing without delving into the nitty-gritties. The book is based on the digitalisation drive forced during COVID era for business survival and although the basics remain unchanged, there have been recent advancement in technology adoption. Impact of COVID accelerating digitalisation for mitigating business risks from a volatile to benign environment is rightly depicted by Amoah et, al (2021). The book promises about the positive aspect of DIKW model, however it does not elaborate the environmental, economical and politically dependant gaps of this model (Peters, M.A. et.al, 2024). In some cases, the examples need to be fact checked as there has been some reported failure scenarios to the promoted concepts such as Walgreens Smart Coolers. This has been an unsuccessful product application and was flagged as a case of unethical use of AI without customer consent (Kirzhakova.L, 2024). Use and application of AI has been shown in a very ethical manner and the authors steer away from scenarios where the lack of emotional attachments as well as empathy has been the biggest challenge for AI adoption (Bhansali.D, 2022). For more experienced working professionals, a higher and more detailed book will be the expectation and this book is just a basic read for them. It does not have case studies and most of the examples presented use a superficial level of technology application.

4.0 Book evaluation

4.1 Key aspects of the book

The book touches on the gaps that marketing personnel and businesses are struggling to keep up with the changing generational needs today. It points out the generational, prosperity and digital disparity in the society that is escalating the challenges further. As rightly pointed out, closing digital divide in today's context is a key to economic growth and prosperity (Arora & Sapre, 2025). Accordingly to stay relevant, the book recommends an amalgamation of traditional and digital techniques coupled with AI, IoT, VR and advanced sensing is recommended to be used at the right marketing hierarchy to enhance business outreach spanned across the existing 5 generations. As technologies lack the human touch, a sensible application of chatbots or other advanced technologies is recommended to areas where non-human customer support deems fit while human touch and feel can be more impactful to bring in customer personalisation. Studies highlight that

customers give high importance to personalisation for better allocation of their time and money as per their chosen alternatives (Weidig, J. et, al. 2024). For new generation of marketing, decision by humans based on analytic and prediction by machines is a more fruitful approach. Charles, V. et, al (2022) presents data about decision enhancement of government processes using AI based data; which has indeed increased public value creation.

4.2 Meeting reader expectations

Overall, Marketing 5.0 hits the right spot for any beginner or novice who wants to understand and apply technology to the marketing arena. It paints a clear picture and guides the reader about the strength and weakness of various technologies. The use of realistic examples, flow charts, maps and summary defines a good understanding for each chapter without the need to delve deep into technologies for a non-technical marketer. At an entry level, this book can be referred as a baseline to understand various technological aspects that can be tied to modern marketing era. For a more experienced technocrat in marketing domain, this book may be a basic read and needs to be complimented with other books that provide in depth technical details.

4.3 Comment on price versus value

As a basic entry level book for 1st year marketing students, this hardcopy book is rightly priced at Rs.1700-1800/- (\$18), available at Amazon. A more detailed book that applies technology to marketing for a more advanced level reader will easily be priced more than Rs. 2200/- (\$24). For a novice into marketing who wants to know more about the technologies that are available to be easily adopted, this book is just rightly priced.

4.4 Recommendations

Marketing 5.0 is a good reading reference for a tyro into marketing domains who is interested to know what are the various technologies available out there at his disposal. It can be a starting reference and needs to be complemented by reading few other content heavy books in the domain such as:

- Shoot The HiPPO: How to be a killer Digital Marketing Manager by Tom Bowden & Tom Jepson priced at Rs.2400/- (\$26)
- Digital Marketing by Dave Chaffey & Fiona-Ellis Chadwick priced at Rs.4600/- (\$51)

•Marketing Communications: Integrating Online and Offline, Customer Engagement and Digital Technologies by PR Smith & Ze Zook priced at Rs.4700/- (\$52)

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6.0 Summary table and key focus of the entire book

Part	Topic	Chapter highlights	Noteworthy examples
I	Introduction	1) Talks about need for technology adoption in marketing to match generational needs 2) Introduces the marketing transition to adopt digital methodologies that were forced due to COVID 19 impacts 3) Builds up a matrix between new customer experience (Cx) to match the new technologies of AI, IoT, Sensors, AR, VR 4) Briefly touches upon the 5 key factors of Marketing 5.0 that use technology for data driven decision driven, predictive, contextual, agentic and agile marketing	1) Amazon, Netflix, Youtube using AI enabled analytics to reveal consumer shopping patterns 2) Lexus and Chase utilizing AI to generate advertisements with minimum human involvement 3) Nestle using AI empowered robots in Japan as coffee waiters 4) Hilton US, using robot concierge
II	Marketers' challenges in digital world	1) Generational gaps: Explains about the challenges marketers have to face to serve across 5 generations: Baby boomers, GenX, GenY, GenZ and Gen Alpha, their respective brand preferences such as established, exponential and engaging as well as their life stages influencing buying decisions 2) Prosperity gaps: a) Talks about the widening divide between classes and masses, access of high end technological benefits to the rich class whereas the mass struggle for basic necessities b) To develop CSR and ESG initiatives to build brand value and gain customer trust and loyalty 3) Digital gaps: a) Talks about the global availability of internet, affordability and the gap in between b) Describes the fact that Humans to human and machine to machine connectivity is the future for digital economy c) Financials, media, Telecom and IT companies are way ahead in digital adoption compared to construction, mining, healthcare d) Points out the darker side of digitalisation such as privacy, security issues, loss of jobs, side effects of being online 24x7	1) Polarised ideologies causing market skewness such as political inclination to BREXIT 2) Minimalist living as part of polarised lifestyle advocated by renowned Japanese home decorator Marie Kondo 3) Societal and sustainability initiatives by The Body Shop, Ben & Jerry where customers favor these brands due to such positive societal initiatives 4) Collaborative campaign against Facebook for control of hate speech by Microsoft, Unilever, Starbucks 5) GE developing low cost medical equipments for underprivileged as portable products 6) Machines will always lack the 6 human communication traits of touch such as anger, fear, disgust, sadness, gratitude, happiness, love and sympathy
III	Tech empowered marketing strategies	Chapter 5) a) Gen Z/Alpha are leading the demand for digital transformation while Gen X/Y are the biggest consumers as well as the workforce b) Assessment of digital readiness using 4Q matrix to map digital demand (customer) to digital supply (company) within industries into 4 quadrants of Origin, Onward, Omni, Organic. Refer Figure 1.6 c) Strategic digital migration by giving incentives, resolving inefficiencies of physical transactions by digital, save costs utilizing digital methods such as chatbots for frontline interactions Chapter 6) a) Rise of next gen technology based marketing is driven by 6 key enablers of open source, compute power, internet, cloud, mobile/handheld devices and big data b) Applying AI, IoT, Sensors, AR, VR technologies to enhance and expand business strategies c) Utilizing the 6 human abilities of cognitive (use AI), communications (use NLP), sensing (use sensors), movement (use robotics), vision (use mixed reality) and networked transactions (IoT/Blockchain) that can be mimicked by machines to develop businesses	1) 100th monkey effect that causes behavioural shift among masses 2) Emergence of Netflix, Zoom and Cashless payments triggered during COVID pandemic
		Chapter 6) a) Rise of next gen technology based marketing is driven by 6 key enablers of open source, compute power, internet, cloud, mobile/handheld devices and big data b) Applying AI, IoT, Sensors, AR, VR technologies to enhance and expand business strategies c) Utilizing the 6 human abilities of cognitive (use AI), communications (use NLP), sensing (use sensors), movement (use robotics), vision (use mixed reality) and networked transactions (IoT/Blockchain) that can be mimicked by machines to develop businesses	1) Open sourcing of AI research by Google, IBM, Microsoft, Facebook 2) Cloud computing dominated by Microsoft, Alibaba, IBM, Amazon, Google 3) Lyft, Sephora, Starbucks using chatbots to take orders 4) Nutropix, RapidMew using chatbots to generate business leads 5) Amazon Alexa, Apple Siri, Google Assistant emerging as automated multilingual voice assistants 6) TESCO utilizing image and facial recognition sensors to define product placements, customer age based promotions 7) Studio M, Singapore using robot chefs

		Chapter 7) - Highlights failure points for complete automation without human touch - For enriched customer experience (CX), a combination of human and machine has to be considered - Business will thrive if customers are able to define and drive the features around a product - Defines: SAs approach around product CX strategy such as aware (create brand awareness), appeal (create brand appeal), ask (engage and explore), act (decision to buy) and advocate (customers become brand loyal advocates, spread word of mouth awareness) - Utilise convergent thinking of machines and combine with human divergent thinking - Pitches the ideas of AI based contextual advertising, analytics based content marketing, personalised direct marketing, sales CRM using chatbots, service CRM and product customization	- Henn-na hotel in Japan as the 1st robot staffed hotel - Google AI image recognition algorithm (now abandoned) that misinterpreted dark skinned personalities as gorillas - Marriott's AI live social listening center that identifies special occasions for customers and greets them with personalised services/offers - JD.com using drones to deliver goods to remote areas during lockdown - VR use by Prada for customers to virtually browse their retail stores - PepsiCo used analytics to predict which new products in pipeline will have higher market acceptance
IV	Leveraging new tactics for marketing	Chapter 8) - Heterogeneous market and unique customer define the principles of segmentation and targeting - Advocates use of psychographic (quality or cost conscious) and behavioral segmentation (frequent flyer or top spender) along with traditional geographic and demographic profiling to group customers for efficient targeting - Use of data from social, web, point of sale, IoT, engagements as well as media to perform individual profiling	- Social and purchase history tracking via ecommerce transactions in Google or Facebook - Use of beacon sensors to track physical/location movements of customer who logs into loyalty apps
		Chapter 9) - Utilise past customer historical data to develop predictive models using machine learning algorithms and AI - Define predictive analytics based proactive marketing applications for successful brand, product and customer management - Product recommendation engines, product affinity analysis (suggest matching trousers for customer who purchased shirt) are ways to extend product sales	- Netflix usage of predictive and competitor analytics to develop original streaming content - Recommendation engines used by Amazon, Youtube, Tinder
		Chapter 10) - Define the use of various smart technologies for contextual marketing applications - Talks about human situational awareness using AI, IoT for marketers to promote right product to right customers at the right time and place - Drives the 3 level marketing concept of informative (communicate and deliver right price, product, promotion), interactive (interact with customers) and immersive (neuroscience tracking techniques using sensors for personalised engagements)	- Walgreens Cooler Screens - Macy's, Target, CVS using bluetooth beacon technology for personalised app based notifications to customers - Disney and Mayo Clinic use of RFID tags for geo-tracking of customer movements - Alibaba's facial recognition database for customer identification and Smile to pay features - Disney's emotion detection cameras for their movie watchers in cinema halls to capture emotions - Ralph Lauren smart fitting rooms with digital mirrors
		Chapter 11) - Conceptualises Intelligence Amplification (IA) where humans will be decision makers dictated by AI based computational data - Defines concept of physical world driven by market requirements of fast and on demand delivery - Using hybrid human-machine approach to develop a tiered sales structure with chatbots developing leads while humans personalising them	- Walmart and Sephora use AR tools to provide digital shopping experiences - Sephora digital makeover guide and Color IQ for in-store digital experience
		Chapter 12) - Describes traits of agile marketing which are real time analytics, quick response decision making teams, flexible product platforming and concurrent processing steps - short product lifecycle - Open source innovation approach to enable agile development	- Inditex, owner of Zara utilises agile marketing to create more than 10000 designs per year with fast turn around from fashion shows to stores - Google TensorFlow is an open source AI engine

