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Competitive Headwinds.
Tighter Budgets. More Impact.

How AI and Marketing Automation Are Reorganizing the Automotive Industry

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Automotive Marketing Under Pressure — Competing in an Era of Shrinking Budgets and Rising Expectations

Extraordinary pressure on European OEMs

The European automotive industry is under extraordinary pressure. Electrification costs, tariff challenges, and escalating competition are forcing OEMs to deliver more output with fewer resources. Marketing, once a creative playground, has become a strategic battleground where efficiency, speed, and scalability determine competitive advantage. Yet most OEMs are confronted with long-established structures and lack of speed. Everyday marketing operations are fragmented across regions and channels, consuming excessive time and budget while limiting change and innovation. Redundant processes, manual processes, overlapping agency networks, and inconsistent brand and sales experiences are common symptoms. To hold up against internal and external pressures while pushing competitiveness, OEMs must fundamentally rethink how they plan, produce, and distribute marketing across all touchpoints.

Fundamental Disruption on Horizon

Looking beyond OEM boundaries of conducting more traditional forms of marketing, we're witnessing a profound disruption driven by the rise of Generative AI and LLM-based agents. The new web. A new marketing logic. This shift is fundamentally transforming customer expectations and behavioural patterns (e.g. how they search, make decisions, and transact). Emerging studies predict that a significant portion of future customer interactions will be mediated by AI agents — a trend that demands serious reflection. The promise: more effectiveness at lower spending.
As marketing undergoes this transformation, the critical question becomes: are we investing in the right areas? And how do we ensure our strategies align with this new reality.

AI is rewriting how customers discover brands—and how marketing gets made.

For automotive OEMs, the challenge is twofold: disappearing in AI-mediated journeys and falling behind as content demand outpaces resources.

The challenge: The twofold strategic risk of failing to adopt new marketing logic

AI is reshaping how customers discover brands and how marketing is produced. For automotive OEMs, this creates a two-fold strategic risk: losing visibility in AI-mediated journeys and losing efficiency as content demands outpace resources. Both risks are intertwined and must be tackled together.

1. Potential Visibility Risks (Demand Side):

— **Traffic declining?**
Eroding digital visibility
Product discovery and conversion is shifting to AI assistants. Recommendations increasingly narrow to shortlists. Brands that fall outside these AI-curated sets risk disappearing from the customer journey.

— **Content accurate? Brand narratives tewritten by third parties**
LLMs generate product stories from public data. Inaccuracies spread, specs drift, and synthetic content reshapes perception. As third-party voices dominate, control over brand meaning and tone weakens.

— **Speedboats better?**
Smaller players outpacing larger ones
AI lowers the cost of creativity, localization, and personalization. Agile brands with lean processes can scale content faster, iterate in real time, and react to signals immediately. Speed becomes the differentiator — not budget or size.

— **Premium at risk? Products reduced to commodity checklists**
AI-mediated evaluation often flattens vehicles into specs, rankings, and bullet points. Emotional differentiation erodes, making premium positioning harder to sustain when decisions become spec-first and AI-filtered.

2. Potential Efficiency Risks (Supply Side):

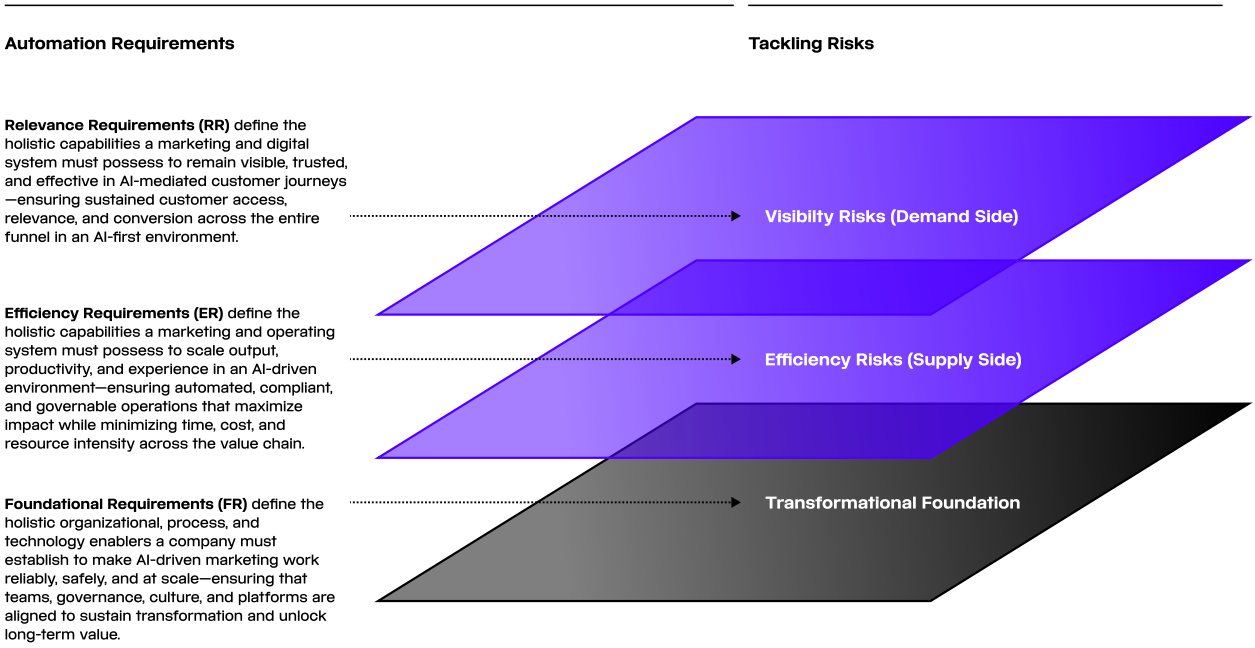
— **Productivity first?**
More excitement with less inputs
Customers and markets expect much higher volumes of content that delights customers — personalized, real-time, and across multiple platforms — while budgets shrink. Traditional production models cannot match the new love-and-scale-to-cost ratio.

— **Too slow to compete?**
Campaign cycles too slow for AI-driven markets
Digital-native competitors operate in iterations of hours or days. In Communication and Commerce. Conventional campaign and web landing structures with weeks of briefing, creation, approval fall behind the pace of culture and algorithmic optimization.

— **Too many cooks?**
Fragmented agency ecosystems
Overlapping networks, duplicated tasks and multi-layered workflows drain resources. Redundancies slow delivery, blur accountability, and dilute strategic coherence.

— **Signals too late?**
Limited, inconsistent measurement
Disjointed data pipelines and non-standard KPIs make optimization difficult. Without unified measurement, performance signals arrive too late to influence decisions.

The visibility risk represents the demand-side threat — being discovered, recommended, understood, and converted in AI-mediated journeys. (Remember: LLMs are reshaping the web at a fundamental level, they are not another channel.) Efficiency risk reflects the supply-side challenge — producing and distributing marketing and commerce at the speed and scale AI markets now require. Any strategy that optimizes supply without securing demand remains incomplete.



Graph 1: Requirements Overview AI Autopilot Operating Model

The mission: Implement a New AI Autopilot Operating Model — From Spend to Sales Growth in Marketing

We argue that OEM marketing must shift from function-based operations to a systemic operating model, with automation and AI at its core. Like LLMs themselves, it runs continuously, learns from every interaction, and automatically optimizes across thousands of customer touchpoints—something human-managed campaigns can never achieve at scale. AI-driven automation and synergistic centralization replace manual, distributed workflows and establish marketing as a self-optimizing operating system.

Addressing pain points with a clear set of requirements for the next marketing operating model

If the target state is a systemic operating model with automation and AI at its core, we first define the essential requirements ("Relevant Requirements" = RR, "Efficiency Requirements" = ER and "Foundational Requirements" = FR) in the backlog below to mitigate the risks outlined above. In the subsequent chapter, we present the future-state solution model that shows how these requirements are met.

1. Relevance Requirements mitigating the demand-side risk (RR)

The next-level marketing operating model must optimize visibility for AI-agent discovery and drive end-to-end conversion within LLM-mediated journeys, ensuring continued customer access. This, in turn, translates into the following core capabilities:

— **RR1 — The system must strengthen LLM quotation and co-mention signals** to ensure your brand becomes the trusted answer surfaced by AI agents. Focus on being cited, referenced, and co-mentioned in authoritative ecosystems—not just remembered by humans.

— **RR2 — The system must create machine-lovable and AI-parsable content** to transform content into AI-first, source-tagged formats that models can parse, verify, and quote reliably. Completeness, clarity, and structured reasoning determine if your brand appears in the answer.

— **RR3 — The system must build personalized and LLM-aware experiences** to enable digital touchpoints to adapt instantly to AI-directed user intent. When an agent hands off a user, your interface should recognise their context, buying stage, and next best action in real time.

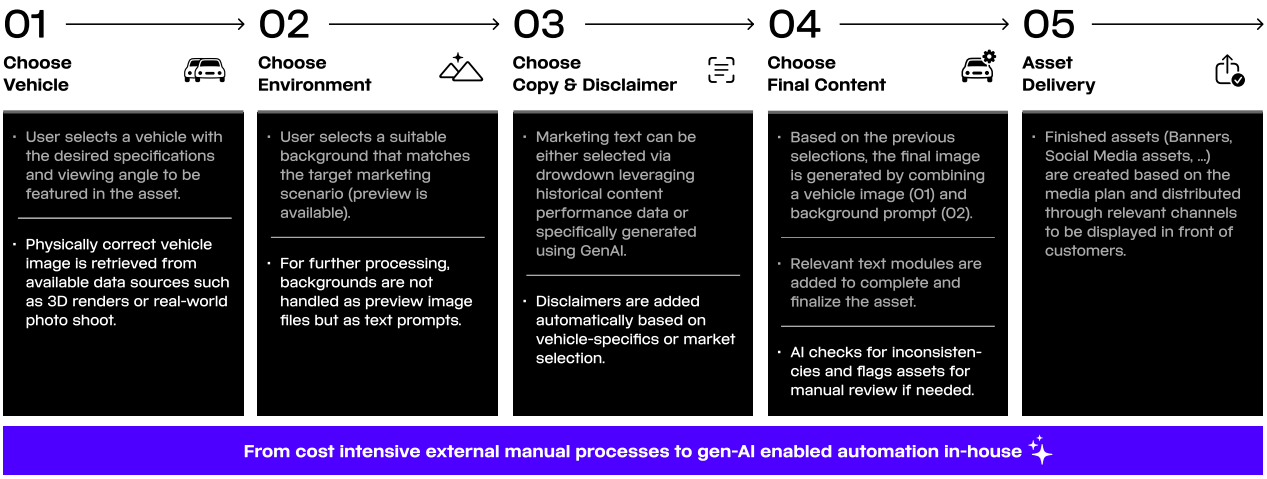
— **RR4 — The system must advance AI-interlinked and model-ready data** to provide governed, trusted, and semantically linked data that AI agents rely on. Make your data easily accessible, validated, and usable through schemas and APIs to strengthen answer reliability.

— **RR5 — The system must innovate through AI-led journey orchestration** to shift from feature-level improvements to building AI-driven customer journeys across the entire funnel. Compete on LLM-first relevance and agent-powered operations that serve the AI-routed customer.

— **RR6 — The system must develop an API- and agent-ready platform layer** to expose fast, modular APIs tailored for agent consumption. AI agents—not browsers—will increasingly request services directly, requiring secure, low-barrier, high-performance access.

2. Efficiency requirements mitigating the supply-side risk (ER)

Moreover, the next-level marketing operating model must automate content supply chains to unlock 50%+ productivity gains and sustain scalable output despite shrinking resources. To deliver on this, it requires the following:



Graph 2: Exemplary steps to use the AI Content Pipeline

— **ER1 — The system must enable automated asset pipelines**
to generate vehicle images, legal disclaimers, and copy at scale, cutting production lead times.

— **ER2 — The system must embed compliance by default**
to integrate legal, WLTP, and brand consistency directly into generation workflows.

— **ER3 — The system must deliver scalable personalization**
to create variants for markets, dealers, and segments without manual overhead.

— **ER4 — The system must provide stakeholder governance**
to allow dealers to adapt campaigns within guardrails while HQ ensures compliance and brand integrity.

— **ER5 — The system must run closed-loop analytics**
to capture every signal (click, lead, AI agent citation) and feed it into continuous improvement.

— **ER6 — The system must define LLM performance KPIs**
to supplement classical lead and conversion KPIs with new metrics (mention rate, first-mention rate, sentiment share).

— **ER7 — The system must track resource ROI measurement**
to quantify cost per lead, campaign cycle time, and FTE savings.

Moreover, beyond these functional requirements, there is a foundational setup layer — the organizational backbone with key enablers — that must be in place to make the operating model work end-to-end. The capabilities above define what the system should do; the following key enablers define how it must be set up, governed, and resourced to deliver them reliably at scale.

3. Foundational Requirements – Key enablers to be encountered for a successful transformation (FR)

The key enablers sit across multiple layers of the new marketing operating model. They span the organizational level (governance, roles, incentives), the process level (standardized workflows and decision rights), and the technology/data level (platform, integration, and quality foundations). Together, they form the backbone that allows AI-driven marketing to run reliably, safely, and at scale across markets and partners.

— **FR1 — Sourcing strategy shift – From buy to make & buy**
The transition to an AI-orchestrated operating model also requires a fundamental shift in sourcing strategy. OEMs are moving from a traditional “buy” approach to a hybrid “make and buy” model. Scalable GenAI-based production is increasingly handled in-house, while external agencies focus on delivering high-impact creative concepts. This hybrid setup enables both speed and distinctiveness—critical success factors in a landscape where communication is becoming increasingly commoditized.

— **FR2 — Invest in GenAI+ technology**
To support this transformation, strategic investments in GenAI tools and automation platforms are essential. These technologies form the backbone of the new operating model, enabling scalable content production, real-time optimization, and seamless orchestration across marketing functions. Watch for early vendor lock-in around core tools, and position custom solutions to stay open, modular, and able to mature as innovation accelerates.

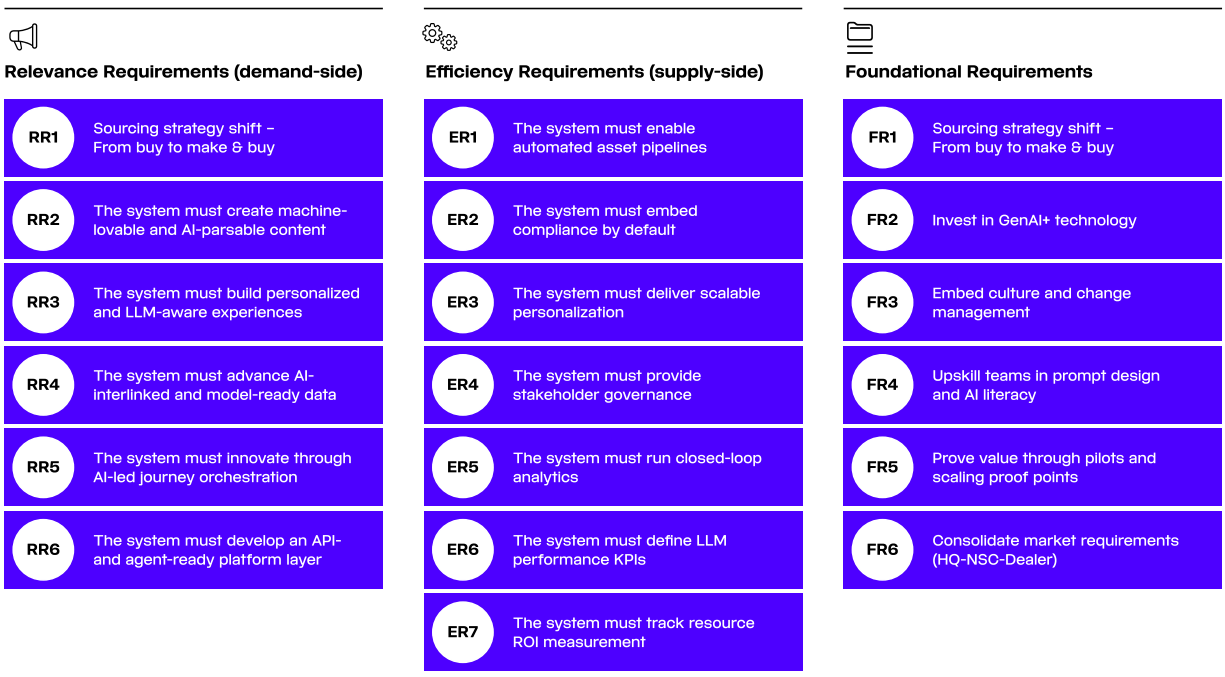
— **FR3 — Embed culture and change management**
Technology alone is not enough—success depends on the human factor. Trust, transparency, and a mindset of continuous improvement are vital. Adopting a GenAI-driven model requires marketers to embrace

new roles, workflows, and ways of thinking. Organizations must foster a culture that supports experimentation, learning, and adaptation.

— **FR4 — Upskill teams in prompt design and AI literacy**
Marketers must be equipped to operate GenAI engines effectively. This includes training in prompt design, data interpretation, and AI ethics. A structured skill transition framework is needed to identify which capabilities remain essential—such as brand strategy and storytelling—and which new skills must be developed, including prompt engineering, AI tool operation, and data literacy.

— **FR5 — Prove value through pilots and scaling proof points**
Pilot projects and proof points in scaling and effectiveness are critical to demonstrate the strategic and operational value of GenAI. These initiatives empower teams to focus on higher-value work—such as strategic creativity and innovation—while AI handles complexity. Teams need to experience the evidence how AI simplifies rather than complicates workflows, initial skepticism often transforms into momentum.

— **FR6 — Consolidate market requirements (HQ-NSC-Dealer)**
OEMs face unique challenges in aligning headquarters, dealers, and national sales companies. A consolidated approach to market requirements ensures that local needs are captured and harmonized, enabling scalable production without sacrificing relevance. This function becomes a strategic enabler, bridging the gap between central operations and local execution.



Graph 3: Addressing the pain points with requirements

Excursus

FR6 Deep Dive: Market Requirement Consolidation

Realizing GenAI's full potential requires more than just technology—it demands an organizational backbone capable of harmonizing market needs and translating them into scalable production workflows. The true value of Generative AI in asset generation for example lies in scale: how many assets can be produced or adapted efficiently, without compromising quality or compliance.

Historically, local markets have resisted centralization, citing creative freedom or unique operational circumstances. This makes sense because markets are closest to customers and their needs. However, many of these barriers are cultural rather than structural. A "Market Requirement Consolidation Function" within an organisation bridges this divide by systematically collecting, harmonizing, and prioritizing local needs. It acts as a single interface between markets and central production, ensuring local nuances are respected while automation and standardization are fully leveraged.

Its dual objectives are clear: deliver assets "first-time-right" to minimize rework and feedback loops, and establish a continuous learning process that evolves based on market input and performance data. For local teams, this model reduces operational workload while maintaining relevance. For HQ, it ensures consistent governance, faster production, and reduced reliance on external agencies. For a typical OEM, this can unlock 20–30% staff efficiency in asset-related roles—achieved through fewer feedback cycles, consolidated agency interfaces, and automated production flows.

Graph 4: Step by step to an integrated operating system

The solution: A Scalable AI-Driven Marketing Operating System — a joint framework of Berylls by AlixPartners & OH-SO Digital

To make the AI Autopilot Operating Model real, OEMs need three things: (1) a clear view of their current LLM visibility and readiness status, (2) a measurement and steering layer that stays independent of tool hype, and (3) an integrated operating-system framework that connects planning, production, publishing, and performance.

1. Know your status: Assessment of Current LLM Visibility & AI Readiness

A successful transition toward an AI-orchestrated operating model begins with a clear understanding of the status quo. An initial assessment of a brand's current visibility within Large Language Models, its content structure, technological foundations, and organizational readiness establishes the baseline for any effective AI transformation.

This assessment identifies how strongly the brand is represented across leading LLMs, which attributes it owns, where competitors outperform, and how well data, content, and systems are prepared for the emerging agentic web. The outcome provides a precise view of structural gaps, fast-impact opportunities, and foundational requirements for scalable AI adoption. It becomes a critical strategic enabler—ensuring that subsequent investments in automation, content generation, and orchestration rest on solid ground and directly contribute to future competitiveness. The transformation starts with measurable visibility and readiness.

At the core of OH-SO and Berylls by AlixPartners' joint offering sits RAIDAR, OH-SO's proprietary LLM Brand Ranking Monitor, built to make brands "visible, citable and competitive" in the world of ChatGPT, Gemini, and tomorrow's autonomous agents - providing that measurement layer as the entry point into our framework.

RAIDAR delivers statistically robust visibility intelligence, and our advisory capabilities convert it into roadmaps, operating models, and measurable competitive advantage.

2. Measurement and Steering: The Unique Fusion of Advanced AI Software and High-End Strategic Consulting

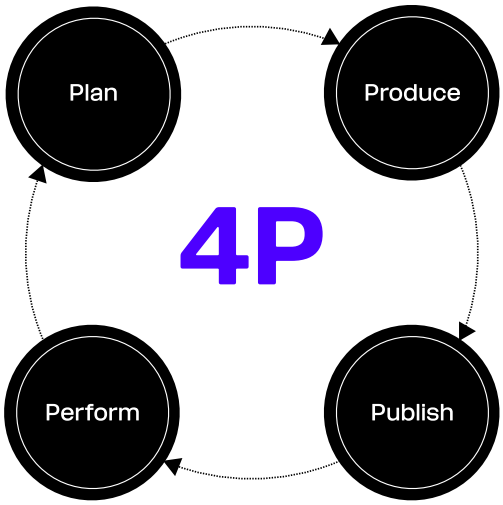
RAIDAR tracks brand and product visibility, competitive performance, audience sentiment, personas, funnel relevance and more—evaluating thousands of prompts with statistical reliability. With KPIs such as the Overall LLM Fitness Score, Brand Attribute Ownership Radar, Brand Share by AIDA Phase, and Persona Sentiment Analysis, RAIDAR enables leaders to understand exactly how LLMs perceive their brand today and where strategic attention is needed.

Yet **RAIDAR's** true value unfolds when combined with our strategic advisory and operational transformation capabilities. Insights generated by RAIDAR feed seamlessly into consulting frameworks to define readiness gaps, prioritize NOW–NEW–NEXT actions, and build AI-centric operating models—an approach illustrated through readiness audits and roadmap development in the case materials. The result is a uniquely effective market offering: a fully integrated system that not only measures what matters in the age of AI, but also guides organizations in turning those insights into strategic growth, operational excellence, and future-proof brand relevance.

In short: **RAIDAR** diagnoses and tracks the visibility risk, while our operating-system framework fixes it through automation and orchestration.

3. Integrated Operating System Framework: Our framework translates the requirements across the full 4P value chain

Self-optimizing marketing systems continuously improve the full 4Ps value chain from **Planning** (Brand Fit, Audience Segmentation & Campaign Planning) over **Production** (Content, Assets, Web- & Commerce-Platforms) to **Publishing** (Media-Channels, Targeting & Format Adaptions) and **Performance** (KPIs, Learnings & Productivity).



Generative AI doesn't eliminate creativity—it redefines it. The creative function is evolving from traditional campaign and agency management toward prompt engineering, AI tool operation, and data-driven workflow management.

Rather than briefing agencies and coordinating multiple partners, future marketing teams will focus on operating the GenAI engine itself—guiding systems, curating outputs, and refining prompts. This shift demands a new skillset: data literacy, system understanding, and the ability to translate brand strategy into machine-readable prompts.

In essence, creative work becomes system-guiding work, blending artistry with algorithmic thinking. OEMs that invest early in these capabilities will gain a structural advantage in cost, speed, and creative control.

The target state is a **self-regulating marketing Operating System**, where:

— **Planning is AI-augmented**
Predictive insights, dynamic prioritization

— **Production is automated**
Text, image, video assets brand- and product-consistency by design

— **Publishing is self-learning**
Cross-channel orchestration, format-agnostic, adaptive to markets

— **Performance is feedback-driven**
Real-time optimization loops, last-mile media re-targeting, KPI-linked investment shifts

Future State: From Automation to Marketing Autonomy

Our framework defines the AI-driven Marketing Operating System OEMs need to master today — automating the 4Ps and closing the visibility and efficiency gaps. It is designed for continuous improvement: step by step, the system learns from every interaction, gets consistently better, and scales its impact over time. This is the foundation to reach the next goals. As AI capabilities mature, marketing will evolve beyond assisted automation toward a fully integrated, AI-orchestrated operating system.

Here is the outlook:

The Integrated Operating System of the Future

— AI-assisted processes are no longer sufficient. The future lies in AI-orchestrated enterprises where intelligent agents continuously learn, adapt, and autonomously execute processes in real time. Organizations that embrace this shift will unlock new levels of productivity, agility, and innovation. In this new paradigm, AI doesn't just support decision-making

→ It becomes the decision-maker

— This evolution goes beyond operational efficiency; it's about building strategic resilience. OEMs that master AI orchestration will remain relevant in an era dominated by agentic web ecosystems, where AI agents replace search engines

→ It shapes customer consideration and influences purchasing decisions

— To stay ahead, companies must invest now. Marketing will be transformed by a network of AI agents across the entire content supply chain, from insight generation to content creation and delivery requiring a complete internal transformation

→ It changes workflows and team structures massively

— AI-driven campaign managers are already testing, learning, and optimizing consumer touchpoints in real time. The future of marketing is not just automated— it's autonomous

→ It gets autonomous instead of automated

This is not a side approach; it is a non-negotiable shift to a full future operating model for AI-era marketing. This is exactly where our joint setup comes in.

Case

AI Marketing Transformation for an International Premium OEM

An international premium automotive OEM partnered with us to fundamentally modernize its marketing operations using AI. The goal: dramatically increase speed, relevance, personalization, and cost efficiency across all campaign activities.

Challenge:

The OEM faced coventional, fragmented marketing processes, rising content demands, high production costs, and the need for market-adaptive, personalized communication at scale. Frequent last-minute changes made traditional workflows even more inefficient.

Solution:

OH-SO Digital and Berylls by AlixPartners implemented a fully AI-powered end-to-end marketing automation system built on the **4P** model.

Key components included:

— AI-assisted planning, briefing and strategy generation

— Automated creation of campaign assets (visuals, copy, formats, audio)

— AI-driven adaptation into thousands of digital and print formats

— Automated publication workflows and channel-specific optimization

— Continuous performance feedback and real-time content adjustments

This created a seamless marketing pipeline that combines human creativity with AI-enabled production and decision intelligence.

Results:

— **Significant time-to-market acceleration:** Tasks that took weeks were completed in hours.

— **Large cost reductions:** Automated production replaced manual processes and reduced external spend at scale.

— **Higher brand consistency and quality:** AI enforced guidelines and delivered uniform output across channels.

— **Improved customer and market relevance:** Adaptive content became personalized, timely and context-aware.

— **Stronger organizational capability:** Teams gained new AI skills, freeing time for creative and strategic work.

Impact:

The OEM now operates with a marketing engine that is faster, more efficient, and more aligned with the realities of dynamic automotive markets. The project stands as a blueprint for how AI can elevate automotive marketing to a new level of precision, efficiency, and competitive advantage — and demonstrates the combined strength of OH-SO and Berylls in delivering transformative AI marketing solutions.

Why us:
Berylls by AlixPartners × OH-SO Deliver Uniquely

Berylls by AlixPartners and OH-SO Digital combine the capabilities OEMs need to execute this shift end-to-end. While most market offerings lean either towards pure software tooling or classic advisory, OH-SO and Berylls by AlixPartners offer Software-Enabled Consulting, the perfect mix of advanced AI infrastructure and deep strategic expertise—bridging the gap between data, technology, and organizational decision-making.

Berylls by AlixPartners brings deep automotive marketing strategy and operating-model transformation expertise — ensuring AI marketing aligns with corporate priorities and commercial impact. OH-SO contributes AI-native product and implementation strength — turning strategy into automated, measurable marketing operations. Together: End-to-end capability across strategy formulation, organizational design, technology implementation, and change management.