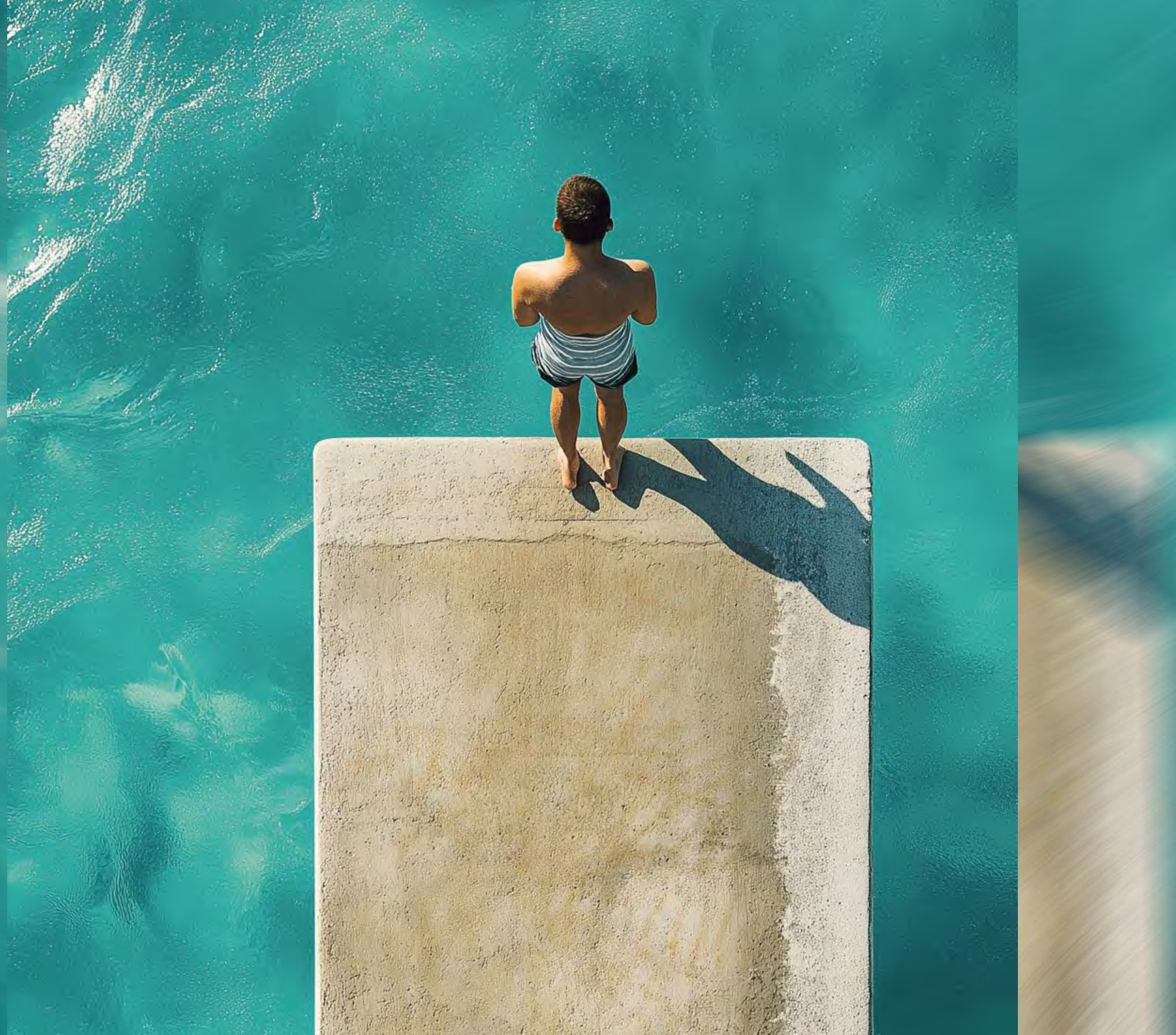


BRANDPIE

THE TIPPING POINT

It's time for CMOs to lead culture



Its time for CMOs to lead culture



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The role of the Chief Marketing Officer (CMO) has always been dynamic and one of the most fluid and evolving roles in the C-Suite. While CMOs have long been recognized as the organization's best storytellers and customer champions, their remit has largely been confined to the external marketplace.

THE GAME HAS CHANGED

In a world where culture is a key differentiator, the lines between external brand perception and internal employee engagement have blurred. The role of the marketing leader has been redefined. Again. Increasingly, CMOs are stepping up to co-own the development of human capital—a responsibility traditionally housed within increasingly automated and compliance-driven HR operations, who have gradually become distanced from the human connection. CMOs are fast becoming architects of organizational culture.

WE SET OUT TO EXPLORE A TREND; INSTEAD, WE FOUND A TIPPING POINT

To better understand this shift, we spoke with 50 leading CMOs across industries

and geographies, sparking conversations that revealed a surge of interest and urgency. Our goal was to dig deeper than the surface statistics, uncovering the human stories behind the numbers. What we discovered has profound implications—not just for CMOs, but for CHROs and CEOs as well.

This report captures the insights and the tensions from those conversations and how the customer experience has never been more contingent on employee experience. It explores the forces driving this transformation and presents a compelling case for CMOs to embrace their new role as “culture catalysts”.

Leadership is being redefined, and CMOs are at the center of this shift.

Welcome to “The Tipping Point.” It's time for CMOs to lead culture.



Testing the hypothesis

The purpose of this research was to assess to what degree CMOs have increased their role in culture, employer brand, and employee engagement.

METHODOLOGY

Qualitative interviews with a cross-section of CMOs, supported with market/industry data.

ACTIONABLE INSIGHTS

Identify actions and ideas that CMOs could put into practice.

50

PARTICIPATING ORGANIZATIONS

AES	EY	Learning Care Group
AIG	Fifth Third Bank	LPL Financial
Alcon	Forefront Dermatology	LTIMindtree
Arcadis	Forvis Mazars	Mitie
Arch Insurance	Freddie Mac	NatWest Group
athenahealth	General Mills	Nextivity
Atlas Renewable	GeoBlue	NFP
Energy	IBM	Penske
Caymus Vineyards	IBM Consulting	Piedmont Healthcare
CBRE	IEEE (Institute of	RWA Wealth Partners
Commonwealth Fusion	Electrical & Electronics	Shaw Industries
Systems Energy	Engineers)	Shell Chemical
Chartis	ING	Shell Energy
Confluent Health	Ingredion	Sherwin Williams
CSC	Innophos	SimonMed
CSG Corporation	Jungbunzlauer	SLB OneSubsea
Delta Air Lines	Kingsley Napley	The Conference Board
Expana	KPS Capital Partners	US Venture

OVER-ARCHING FINDING

Marketing leaders are taking ownership of employee experience

Our hypothesis that more CMOs were focusing on culture was borne out. And early agreement to our interview requests was the first hint of a significant shift. CMOs are increasingly expanding their influence beyond market-facing brand storytelling to shape employee experience (EX). This shift is driven by marketers’ inherent expertise in stakeholder understanding and evolving demographics, their brand storytelling ability, a keen understanding of omnichannel message delivery and engagement, and a growing recognition that creating the right environment—business and brand-aligned EX—encourages advocacy, which directly influences the success of an external brand.

Today, EX is increasingly being designed in much the same way as customer journeys. Through data-driven insights, personalization, and seamless engagement across multiple touchpoints, the barrier between HR and marketing responsibilities is becoming more porous. This convergence is calling for both functions to become complementary partners in driving organizational success. As one CMO noted, “HR has fought for so long to be taken seriously as a strategic function, they’ve forced themselves into a less human box.” Our conversations unearthed four key tensions that are contributors to more CMO involvement and even, in some cases, outright ownership of EX and culture.

78%

of CMOs have significant involvement in employee engagement initiatives. This shift is particularly pronounced in organizations focused on growth and transformation.



Tensions leading to
CMOs' expanding role
in employee experience

What we found

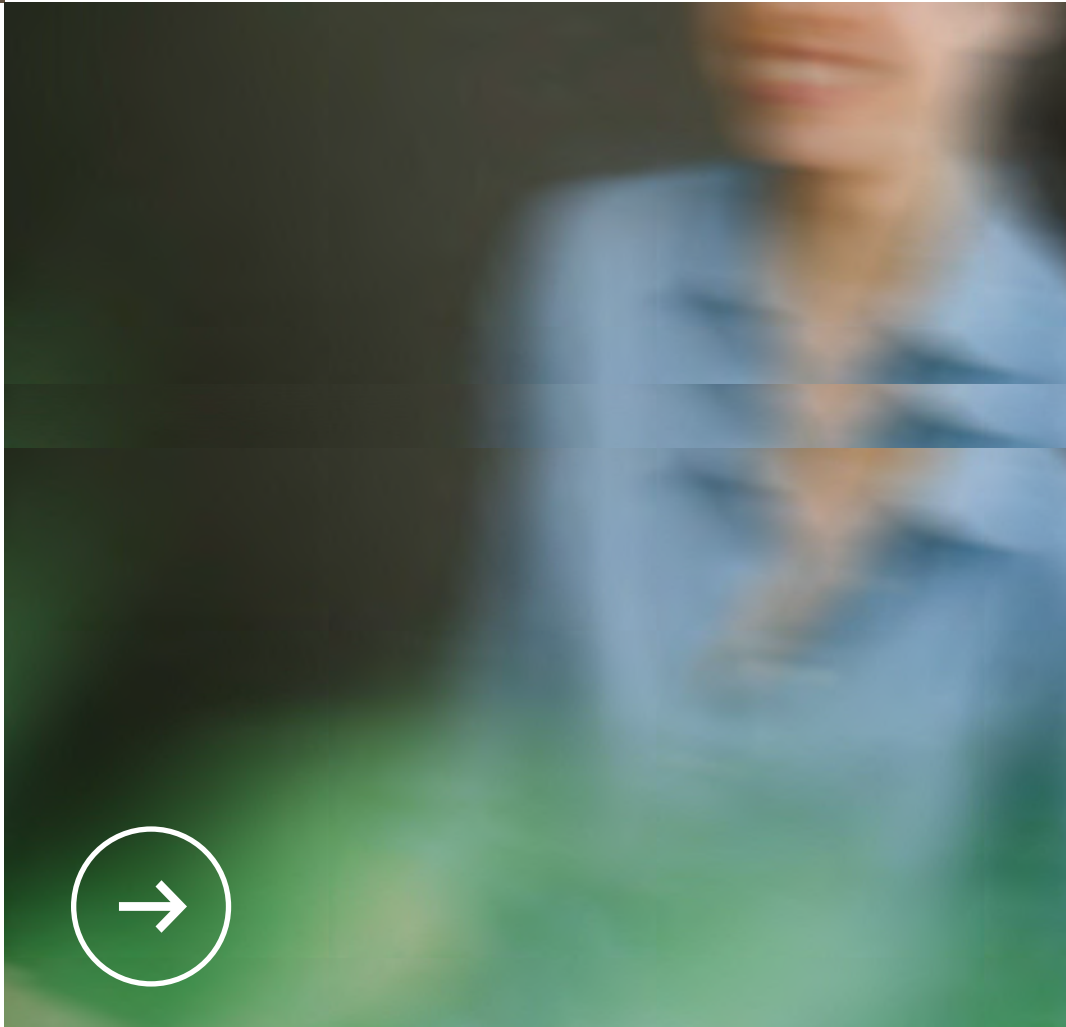
01

Employee experience
and customer experience
are critically linked



02

Marketers are the
best storytellers



03

Digital is the key to a
unified brand experience
across all touch points

04

Brand is a competitive
advantage in talent acquisition



01

Employee experience and customer experience are critically linked

OUR FINDINGS

Engineering the right employee experience is critical to delivering the brand's promised customer experience.

100%

All interviewed CMOs emphasized the critical importance of maintaining consistency between external brand promises and internal culture.

The employee-customer experience loop is vital to building value

32%

of customers would stop doing business with a brand they loved after one bad experience.

(PwC)

A brand is no longer just what it sells—it’s the experiences it delivers at every touchpoint. And at the heart of those interactions? Employees.

CMOs understand that EX is now a defining factor in shaping customer experience (CX), making it a critical business priority rather than an afterthought. According to PwC, 32% of customers would stop doing business with a brand they loved after one bad experience—highlighting the need for engaged employees who embody the brand’s values.

HAPPY EMPLOYEES, HAPPY CUSTOMERS

One of the strongest yet most overlooked drivers of customer satisfaction is EX. As one leader put it, “Super important and massively underrated. Happy people, happy customers.” Employees who feel valued and supported are not only more productive but also more likely to deliver the kind of service that creates loyal customers.

For industries built on service and direct customer interaction, this relationship is even more pronounced. As another industry leader put it, “Brand is a manifestation of absolutely everything you do.” When employees thrive, customers feel it—leading to better service, stronger relationships, and brand loyalty.

EMPLOYEE EXPERIENCE MUST MATCH CUSTOMER EXPECTATIONS

Customer expectations are constantly evolving—shaped by economic trends, cultural shifts, and digital advancements. Employees must continually adapt to meet new demands.

However, if their internal experience is disconnected from the brand’s external >

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When employees are clear what the brand stands for and are inspired by the proposition, consumers feel that alignment in every interaction.

Jody Bilney
Public/Private Company Board
Member & Former CMO

> promise, customers will notice. “When customer sentiment is changing, it directly influences the experience of a good portion of our employees,” explained Stacy Simpson, Chief Marketing Officer, athenahealth, Inc.

A company that markets as a customer-centric organization but fails to invest in its employees creates a clear disconnect—one that translates into inconsistent and uninspired customer interactions.

EMPLOYEES ARE THE BRAND

Whether customer-facing or behind the scenes, every employee is a brand ambassador. Their attitudes, behaviors, and engagement levels directly impact how customers perceive the company. A study by Salesforce and Forbes Insights showed that 70% of leaders agreed that an improved EX leads to improved CX, which ultimately results in business growth. But a disengaged or dissatisfied employee cannot deliver an exceptional CX.

“If their experience is counter to what we’re saying to the customers that the company stands for, it’s going to come through,” said a

70%

of leaders agreed that an improved EX leads to improved CX

(Salesforce and Forbes Insights)

marketing leader. Investing in employees pays off not just in retention and productivity but also in the consistency and authenticity of customer interactions.

BUILDING A BRAND FROM THE INSIDE OUT

The most powerful marketing campaigns and customer promises mean little if they aren’t backed by employees who truly believe in and experience them firsthand.


By designing an employee experience that aligns with customer expectations, companies ensure that their brand promise is not just a statement—it’s a lived reality. In the end, a great CX starts with those who deliver it everyday.

Branding from the inside out

How employee experience transforms customer interactions

The powerful connection between EX and CX is often underestimated. Exceptional CX is impossible without exceptional EX. But achieving this multiplication effect demands precision engineering of organizational culture. When employees feel valued, equipped, and aligned with your brand purpose, they create authentic customer experiences that no amount of customer service scripts can replicate.



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01

EMOTIONAL INVESTMENT
Employees who experience a positive, purposeful work environment naturally transfer that positive energy to customer interactions. Their enthusiasm becomes contagious, creating memorable customer experiences.

02

DECISION-MAKING AUTONOMY
When employees understand and internalize the brand promise, they make better real-time decisions that align with customer expectations. They don't just follow protocols—they intelligently adapt to customer needs while staying true to the brand's essence.

03

INNOVATION FROM WITHIN
Engaged employees who feel heard are more likely to suggest improvements to products, services, and processes based on direct customer feedback. They become a vital link in your continuous improvement cycle.



This is where the CMO-informed approach becomes critical to HR delivery—aligning every aspect of the employee journey with your brand promise.

KEY AREAS TO ALIGN EX WITH CX INCLUDE:

- Recruitment marketing and experiences that attract talent who resonate with your brand.
- Onboarding processes that immerse new hires in your brand culture.
- Learning & development programs that build brand-aligned capabilities.
- Compensation structures that reward brand-supporting behaviors.
- Tools and workflows that enable employees to deliver the promised customer experience.

WHEN EMPLOYEES UNDERSTAND THEIR ROLE IN DELIVERING THE BRAND PROMISE, WE SEE:

- Reduced customer service resolution times.
- Higher customer satisfaction scores.
- Increased employee-driven innovation.
- Better customer retention rates.
- More authentic customer relationships.

The EX-to-CX culture is deliberately designed to deliver specific employee and customer experiences that fulfill your brand promise.

As Richard Branson emphasizes, “Clients do not come first. Employees come first. If you take care of your employees, they will take care of your clients. The way you treat your employees is the way they will treat your customers”.

A man in a blue shirt is standing at the front of a room, gesturing with his hands as if presenting. He is facing a group of people whose backs are to the camera. The room has large windows and a modern, open-plan feel. There are some plants and a wooden shelf in the background.

02

Marketers are the best storytellers

OUR FINDINGS

Storytelling is key in optimizing the employee experience

Marketing's core competency in narrative development and audience engagement is increasingly being leveraged for internal communications.

The power of storytelling in internal communications

Marketing is renowned for its ability to craft narratives that resonate with audiences—whether encouraging customers to buy or by building brand loyalty. This expertise is now being leveraged for internal communications, helping shape how employees perceive company culture, embrace change, and stay motivated in an increasingly agile, digital, and remote/hybrid workplace.

While CHROs focus on employee well-being, they often take a more administrative approach to communication. Without marketing's storytelling mindset, HR-led communication initiatives can risk being perceived as dry, transactional, and disengaging.

Marketing leaders have a proven track record of crafting compelling value propositions that ultimately influence behaviors and decisions. While traditionally focused on customers, the same techniques apply to attracting, motivating, and retaining employees.

A story on its own won't have a huge impact on EX. But leveraging the key skills CMOs have in building a strong emotional connection through experience and moments—that were typically the remit of HR, Facilities, etc.—enhances the way organizations connect with their workforce, fostering a more brand-relevant employee experience.

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Marketing has a larger role because we really know how to distil and understand a value proposition, build the stories, and tell the stories that help attract the right talent and [retain] talent.

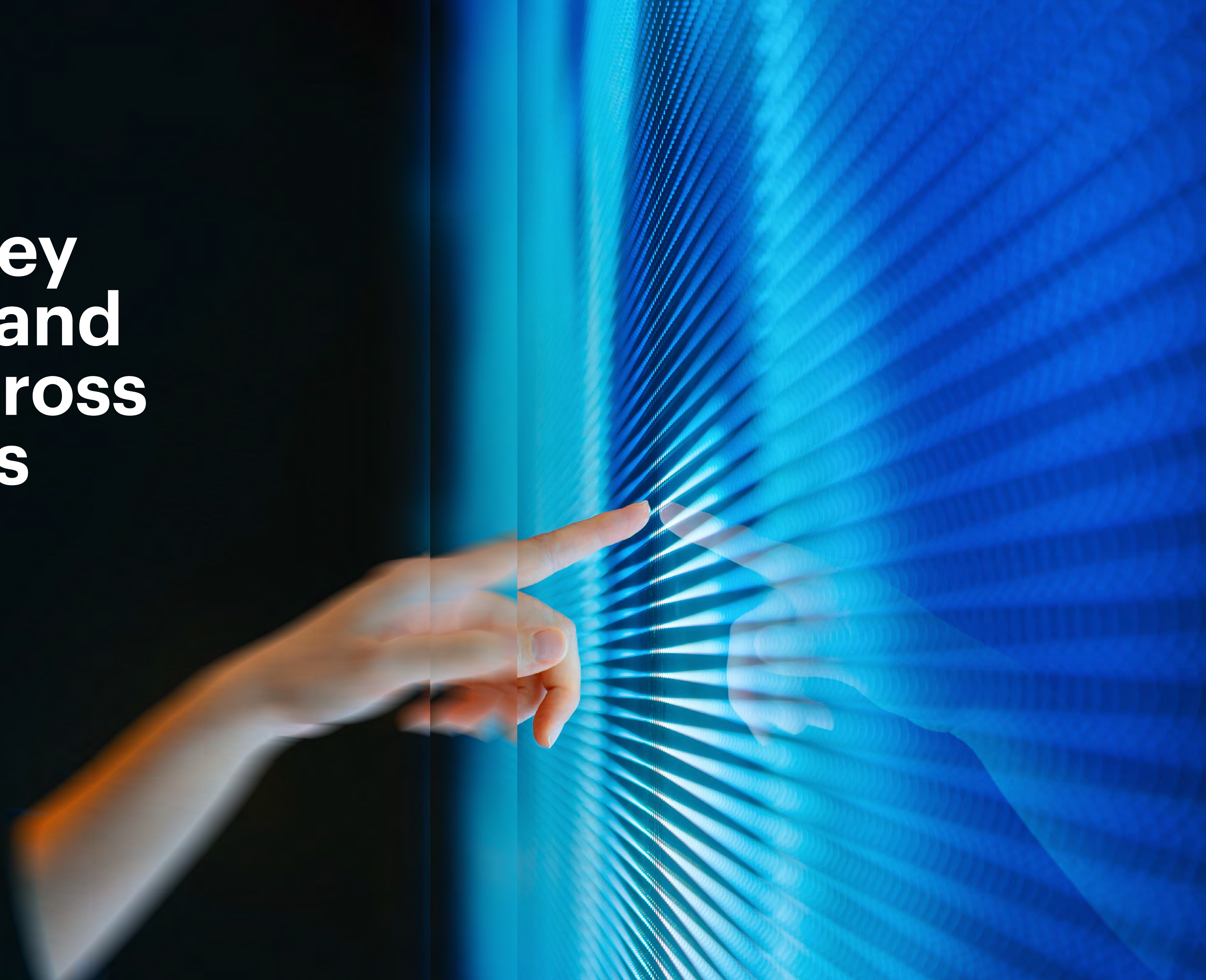
03

Digital is the key to a unified brand experience across all touchpoints

OUR FINDINGS

Digital acceleration has contributed
to marketing's influence on
employee engagement

Marketing's expertise in digital engagement
has become increasingly valuable for
internal communications and shaping
employee experience.



Marketers are leveraging their digital expertise to build employee engagement

Hand-in-hand with storytelling is the delivery of that content. CMOs have long specialized in driving audience engagement through data-driven strategies that create compelling digital experiences that influence behavior and decisions. Central to these efforts is crafting narratives that resonate with audiences across digital channels. This expertise, traditionally focused on customers, is now being applied to employees as well.

Marketing professionals excel at leveraging digital platforms to tell stories that capture attention, sustain engagement, and drive action. In contrast, HR teams, while skilled in people management, often lack the same >

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In a digital-first business world, employees expect the same seamless, engaging experiences internally that they do as customers.



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A lot of HR departments don't have the tools or focus on digital transformation like marketing teams do.

> storytelling approach and may not fully utilize data-driven strategies to enhance employee engagement. Whereas a Capgemini study showed that around three-quarters of CMOs are responsible for contributing to business growth (76%) and data and technology (74%)*.

A DATA-DRIVEN APPROACH TO EMPLOYEE ENGAGEMENT

Modern marketing thrives on real-time data, using metrics such as click-through rates, time-on-page, and engagement levels to optimize customer interactions. The same science is being

adopted with employee engagement, ensuring that internal communications, digital tools, and workplace experiences are continuously refined based on data insights.

Conversely, HR teams often approach engagement from a policy and compliance perspective, lacking a data-driven, audience-first approach. “A lot of HR departments don't have the tools or focus on digital transformation like marketing teams do,” said one CMO.

MARKETING'S ROLE IN A DIGITAL-FIRST EMPLOYEE EXPERIENCE

In a digital-first business world, employees expect the same seamless, engaging experiences internally that they do as customers. CMOs, with their expertise in digital engagement, data analytics, and storytelling, are uniquely positioned to create an EX that mirrors the best customer experiences.

The digital transformation of the workplace is not just about adopting new tools—it's about creating an engaging, intuitive, and dynamic experience for employees. With marketing at the helm, companies can ensure that EX is not just functional but truly transformative.

76%

of CMOs are responsible for contributing to business growth

74%

of CMOs are responsible for contributing to data and technology

(Capgemini)


Fuelling business growth from within

How marketing fuels business growth through employees

“More recently, it’s employees that have become critical in fueling business growth and enhancing brand reputation.

Over the past decade, the balance of power in the marketplace shifted significantly towards consumers, primarily due to the proliferation of readily accessible information through social media, technological advancements, and consumer activism. For marketers, all eyes have been on the customer to power the growth of their business. But more recently, it’s employees that have become critical in fueling business growth and enhancing brand reputation. Our latest CEO Report showed that for CEOs, employees are the number one stakeholder and customers, a very



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close second. Leadership teams have come to recognize that staffing is more than hiring. A high-performance organization doesn’t merely recruit and hire employees. It actively orients them to the culture and goals of the organization and turns them from outsiders into insiders and advocates.

PIVOTING TO EMPOWER INTERNAL STAKEHOLDERS

Tasked with driving growth—among many other responsibilities—marketers have adapted to this new paradigm just as they have to their expanding role over the years. Internal stakeholders are now valued as much as external audiences, with employees recognized as key contributors to customer satisfaction and business success. Just as marketers adapted to the rise of the empowered consumer, they have shifted to engage the empowered workforce—leveraging >

> their strengths in audience insight, storytelling, communication, and digital enablement.

Take Commonwealth Fusion Systems (CFS), where CMO Joe Paluska is shaping culture as a foundation for business success—keeping a highly skilled team engaged and motivated despite long-term horizons, all while doubling the workforce every 18–24 months.

Spun out of MIT in 2018, CFS made history in 2021 by successfully testing a “beta” magnet, securing a record-breaking \$1.8 billion Series B. In under two years, the company transformed a 60-acre field into its headquarters, a magnet factory, and SPARC—its fusion pilot power plant—all while rapidly scaling its workforce and embedding a strong culture. With employees driven by a shared purpose and the potential for world-changing impact, Paluska has created immersive, multi-sensory experiences that turn everyday moments into extraordinary ones. This investment keeps teams aligned, enhances credibility, and ensures the organization’s internal values reflect its external mission.

During this crucial time, employees aren’t just part of the business—they’re driving its growth.

ALIGNING EMPLOYEE AND CUSTOMER EXPERIENCE

The alignment between EX and CX is essential for organizational success. A brand’s promise to customers can only be fulfilled when its employees are fully engaged and aligned with the company’s mission and values. CMOs recognize that a poor EX directly impacts customer satisfaction and brand perception. By ensuring employees are connected to the brand’s purpose, CMOs help strengthen both internal morale and the external brand image.

A TIPPING POINT FOR CULTURE

The marketer’s charge has come to encompass building employee advocacy and brand

ambassadors, enhancing customer service in line with the brand promise, adopting and integrating advanced technologies that improve communication clarity, and implementing programs that acknowledge and reward employees for exemplifying company and brand values to foster a culture of appreciation.

Another tipping point in business has arrived for business leaders. By fostering empowerment, providing advanced tools, and acknowledging contributions, CMOs can enhance both employee satisfaction and customer experiences, leading to growth and sustained success.



04

Brand is a competitive advantage in talent acquisition

OUR FINDINGS

Marketing is increasingly partnering or even owning talent acquisition and retention

The power of the brand has become even more critical as organizations compete for scarce talent across generations and life stages



Brand: the new architect of employee engagement

Historically, EX was considered the purview of HR, which has long worked to position itself as a strategic business partner.

However, as organizations face new challenges in attracting and retaining top talent, CMOs are stepping in with a fresh perspective. By applying their expertise in brand communications and engagement, they are helping to redefine EX through the lens of storytelling—treating them

as a key audience. They are also addressing employees as a stakeholder segment, in much the same way they would segment customers, in order to optimize the end-to-end lifecycle, where every touchpoint from recruitment to an alumni program is brand-aligned.

“We have established a dedicated focus to engaging with our employees as a key audience and applying a marketing sophistication and technology, including segmentation, channel management, and creative executions.

We’re increasingly empowering our internal communications team to influence the marketing and communications strategy for the entire employee experience—from recruitment to prospecting for candidates, all the way through retention, advocacy, and referrals,” said Christa Carone, EVP and Chief Marketing & Communication Officer, LPL Financial LLC.

Marketing leaders have a proven track record of crafting compelling value propositions that ultimately influence behaviors and decisions. While traditionally focused on customers, the same techniques apply to attracting, motivating, and retaining employees. >

> “Marketing has a larger role because we really know how to distil and understand a value proposition, build the stories, and tell the stories that help attract the right talent and [retain] talent,” explained one CMO.

And as Christine Daues, National Consulting Marketing Director, Forvis Mazars US, explained, “People who are looking for roles are expecting a most customized experience for themselves. That general way of recruiting doesn’t work anymore in this world. We think about account-based marketing, now we’re account-based recruiting”.

EX IS NOW A BRAND DIFFERENTIATOR

Another factor driving this convergence is the realization that employee experience directly impacts brand perception. In a notable shift, one CMO highlighted a “reverse feedback loop”—where employee experiences are influencing customer-facing brand strategies. This means that if employees feel disconnected from the brand’s values, customers will notice. Companies are now ensuring that the internal culture

aligns with the external brand promise, making marketing and HR more interdependent than ever before.

THE FUTURE EX DELIVERY—THE YIN AND YANG OF MARKETING AND HR

One thing is clear: marketing has a seat at the talent table and is making valuable contributions in building internal advocacy. There are no standardized best practices for this new collaboration, but our study showed a strong interdependence between the two functions, working in tandem to build a cohesive and authentic brand from the inside out.

“The very best CHROs find partnerships with the marketers. If you were Head of Marketing and your CEO turns to you to say, ‘You’re in charge of culture,’ you can’t do it without the CHRO and the CHRO can’t do it without you,” said Ivan Pollard, Leader, Marketing & Communications Center, The Conference Board, and former CMO.



We’re increasingly empowering our internal communications team to influence the marketing and communications strategy for the entire employee experience.

Christa Carone
EVP and Chief Marketing and Communication Officer, LPL Financial LLC



Finding harmony

Driving a cohesive organizational narrative




The key to achieving harmony lies in cross-functional partnership at the C-Suite level, particularly between the CEO, CMO, and CHRO.

For organizations to drive growth, internal culture must align seamlessly with the external CX. The key to achieving this harmony lies in cross-functional partnership at the C-Suite level, particularly between the CEO, CMO, and CHRO. Because delivering your brand promise to your customers demands an aligned culture—one where the way things are done internally plays out in a positive experience externally for customers.

Each bring unique expertise, and it's this partnership that drives an integrated approach to creating a culture that ultimately drives customer satisfaction and business results. For it to work, each leader needs to be laser



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focused on applying their functions expertise to the partnership.

WHAT THIS MEANS FOR THE CMO

CMOs are an essential component of the employee experience through:

—**A deep understanding of the customer:** they know the client inside out—what they want today and what they'll need in the future. Armed with data, insights, and experience, they are in a unique position to understand external drivers of growth. And as a result, advise and support on key elements of the employee experience that ensure those drivers are met. >



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It’s this insight-led, outside-in approach to EX that is the future of organizational success.

> —**Creative thinking and experience design:** CMOs understand how to design experiences that build connection and loyalty. They can harness this knowledge and skill to design internal experiences that resonate with employees and are connected to the brand, ensuring a consistent message across all internal and external touchpoints.

—**Simplify and reduce friction:** Creating minimum-fuss, hassle-free experiences for customers is a core component of the CMO role. They can apply this mindset to the EX, reducing barriers that hinder satisfaction and performance.

It is these attributes that CMOs can translate into the EX, ensuring employees are equipped and empowered to deliver for customers. They are uniquely positioned to advise and design EX strategies, in conjunction with CHROs, that deliver on the brand promise. It’s this insight-led, outside-in approach to EX that is the future of organizational success.

THE CEO, CMO, AND CHRO PARTNERSHIP: A NECESSARY TRIAD

It’s the collective effort that drives organizational success. In this collaborative model, the CMO’s external insights can shape the employee experience, ensuring customer expectations are met. Working with the CMO, the CHRO ensures that employees have the tools and training to deliver. And this all ladders up to the CEOs overarching business strategy and ambition for growth.

The CMO's Pivot to Culture

The conversations we've had with 50 marketing leaders reinforce one undeniable truth: the role of the CMO is at an inflection point. Traditionally focused on external brand-building, CMOs are now being called to pivot—to bring their expertise in storytelling, engagement, and experience design to shape the culture from within. This is not just an emerging responsibility; it's a strategic opportunity.

THE TIPPING POINT IS HERE

CMOs who choose to pivot towards shaping culture will have the opportunity to elevate their impact—not just on marketing, but on the entire business.

At Brandpie, we believe this moment presents an opportunity to rethink how culture is built, communicated, and lived. As CMOs embrace this expanded influence, we're here to help navigate the journey—because the brands that thrive tomorrow will be the ones that embed culture at their core today.



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Building brands at pivotal business moments