P Anjali Ayurveda: Fishing in the Contested Waters

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Abstract
P Anjali Ayurveda’s foray into Indian fast moving consumer goods market has sent shivers down the spines of most multinational corporations operating in the FMCG space. The companies that ruled in several markets for a very long period of time are faced with a sudden emergence of homegrown P Anjali Ayurveda Limited, a venture created by Baba Ram and his associate. The company managed to cloak a turnover of Rs 5000 crores in 2016 by registering an impressive 150 % percent jump over previous year. It is an extraordinary feat for a homegrown venture to arrive like a buccaneer and steal share from big experienced sharks in broad day light. The magnificent feat of PAnjali can only be appreciated by looking into facts. It took companies several decades to reach Rs 1 billion turnover threshold. For instance, Swiss Nest started its operation in twenties and could reach only about Rs 8000 in 2015. The toothpaste pioneer, Coldante started its operation in 1930s and could reach close to two billion rupee turnover after more than eighty year of toil, almost same is true for P Growler. The biggest of all FMCG’s, Homelver stood on top with a turnover of 30000 crore. But this was achieved by putting in about eighty years. PAnjali on the other hand could reach a billion dollar target in merely ten years. P Anjali is an unsettling reality for incumbent players. Its rapid rise by successfully invading highly contested markets has shocked even marketing experts. The company entered not in pristine but markets where rivals fight fierce battles. Some of these markets show signs of sluggish maturity. Consider the case of noodles, toothpaste, health drinks, flour, cooking oil and cosmetics. Each of these markets has been home to established brands backed by powerful experienced companies. But PAnjali’s brands have gained formidable positions by unabashed direct assault on leader brands like Coldante in toothpaste, Gigi and Yeyee noodles, Bounmalt and Compleplan in health drinks. Apart from branded categories, P Anjali Ayurveda has not even refrained from entering to fragmented commodities markets like atta, pulses, salt, ghee, rice and oils. P Anjali is a baffling phenomenon that prima facie goes against many pearls of business wisdom.

Key Words: Ayurveda, Marketing Strategy, FMCG, Segmentation, Nationalism and Competitive Retaliation

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The setting
Baba Ram and his venture have become a case study in marketing area.

‘It is quite surprising how a company apparently goes against the very grain of effective marketing strategy and become successful. At the heart of effective marketing lies strategy which focuses on selection...’
The theory suggests that trying to become everything to everyone is a sure recipe for disaster. The best evidence in favor of this logic comes from the field of sports. It is almost impossible to gain excellence in many games of play. Consider lawn tennis with names like Roger Federer and Rafel Nadal, in football the top stars are Lionel Messi and Christiano Ronaldo and great names like Mohammad Ali and Mike Tyson belong to boxing. What is common across these names is that these players have excelled in a focused area of sports. But P Anjali Ayurveda’s foray into different arenas from toothpaste to education to honey apparently does not fit together.

The military wisdom commands that it is not a good idea to open multiple fronts of attack simultaneously. It goes against the principle of concentration which commands that resources and efforts should be directed at a narrow area of decisive superiority. But P Anjali has simultaneously opened fight in multiple fronts.

Waging attack at multiple fronts can make line of attack thin and easily penetrable. Further it is very self-destructive to fight multiple battles simultaneously.

A simultaneous retaliatory engagement can be far more than could be easily dealt with. It is apparently a sure way to an easy defeat. It is better to find an opening and build a position of advantage there. Movement into adjacent markets is not advisable in the start. The Table 1 provides a glimpse to the foray of P Anjali into different product-market spaces which pitches it against a whole host of firmly entrenched players. Strategy is an essential part of marketing. Marketers use different approaches to promote their products depending upon the target segment, competition and proposition.

It does not make sense as to why P Anjali has moved into many markets which show signs of maturity and high competition? Some of these are highly segmented and intensely defended.

Consider the following:

- **Toothpaste market**: Toothpaste market is highly segmented. Companies market different product variations designed to cater to specific preference of customer segments. The toothpastes variations include ingredients like salt, herbal, coal and mouthwash; target customers like mother, kids, and young; purpose like cosmetic and medicinal toothpaste; price like economy, mid price and expensive. Each of these segments is house to established brands.

- **Shampoo market**: The shampoo market is inhabited by multinational corporations, home grown companies and local players. The fierceness of the competition has led players to cut market into different segments which include shampoo for long hair, healthy hair, herbal ingredients, shiny hair, color protection, anti-dandruff, nourishing, volumizing, oily hair, dry hair, medicated and non-damage.

- **Toilet soap market**: The reality is no different in toilet soaps market. The intensity of competition can be gauged by the category variations within the category. The toilet soaps market reveals a benefit based segmentation which includes beauty, germ protection, freshness, fragrance, economy, bacteria minimization, skin nourishment, glowing skin and fairness. By and large toilet soaps target women with a few exception where target audience is male.

- **Health drink market**: The health drink market like other markets is also led by three dominant players. Their brands enjoy high equity and are uniquely positioned. For instance, one of the oldest brands targets school going children with the proposition of “Tan Ki Shakti, Man Ki Shakti” or power for both body and heart. Since all of these brands target children, their propositions embody claims about their value delivery. These claims include complete planned food for growing children, secret of energy, and nourishment. One of the
home grown cooperatives also competes for a pie of malted drink market and seeks to lure customer with nutrition platform. The multiplicity of brand and strong company backing indicate market toughness.

- **Hair oil market:** The hair oil market like other markets is also divided into different product and consumer segments. Broadly, the hair oil categories are based on ingredient (amla, coconut, brahmi, almond), perfumes (like jasmine, jabakusum), lightness (light and thick) and hair benefits (for dry hair, hair growth, long hair, shiny hair, split ends, healthy hair, strong hair, colored hair) and cooling effect hair oils. Three top categories of hair oil in the market are coconut, amla and light hair oils. Each of these categories is dominated by firmly entrenched companies with strong brands. The hair oil market is shared by different types of competitors. These include both Indian companies and multinational companies and differ in size and strategies.

- **Face care market:** Face care market is home to a variety of products which include face wash, face gel, face creams, moisturizers, and beauty creams. The creams market is an intensely competed space and is dominated by multinational and home grown brands. Broadly the face care market is divided into segments based on gender (male-female), benefits (sunscreen, moisture, whitening, and beauty), ingredient (herbal), efficacy (claim certification) and ethic (no animal testing). The participants in the market are diverse in terms of their size, scale and financial muscle. The cosmetic market is diverse and therefore allows local, national and international brands to compete concurrently but the competition within each pack is intense.

- **Noodles market:** The Indian instant noodles market was created by a well known Swiss multinational which launched a very popular ready to each noodles. The brand carved out a market in seventies with a proposition ‘fast to cook, good to eat’ by targeting children. The pioneer brand continues to dominate both mind and market when one thinks of instant noodles consumed at home. The might of this brand has been so much that very few marketers tried to venture into this market. One Indian company later challenged the supremacy of the Swiss giant by launching a noodle brand with the proportion of unique round packaging and promise of longer noodles which are fun to slurp in the mouth. The other brands did try to enter to try their mettle in this market on the platform of smoothness, health, soupy noodles but failed to pose supremacy challenge to the pioneer brand of the Swiss company.

- **Juices Market:** The packed juice market has been a duopoly. The branded juice category is shared by a US multinational and an Indian company with roots in herbal formulations. Both these companies fight neck to neck with each other by aggressive marketing, retail presence, product range and other innovations. Lately, another emerging Indian FMCG company arrived in packed juices category with the proposition of ‘being natural’. Several other local players also participate in this market besides organized retail chains market their own store brands in their establishments.

- **Cooking Medium Market:** The cooking oil market shows distinct preferences based on the regions. The different types of oils used in cooking include coconut oil, olive oil, sunflower oil, mustard oil, palm oil, soybean oil, rice bran oil, blended oil, groundnut oil and cottonseed oil. The players in this market come from both organized and unorganized sectors. The other space that stands adjacent to this is pure ghee market. Almost similar reality is present in this market. The pure ghee is a culturally oriented product which enjoys widely shared belief about its health benefits. The cooking medium market has a three tiered structure. At the top level are brands which operate at the national level. These brands enjoy backing of big companies. The middle space is inhabited by regional players which enjoy region or state
specific equity. Huge market exists at the bottom level where cooking medium is sold as a commodity in loose form.

P Anjali’s entry into most of the markets is not like that of a pioneer. Rather these markets have been highly contested spaces with firmly entrenched big, medium and small players. In most cases, the market is a typical pattern of high concentration ratio. That is first top players or brand control around three quarters of the market.

The high concentration ratio typically indicates presence of an oligopolistic market structure. And in this kind of structure, the entry of a new player is strongly resisted and met with fierce competitive retaliation.

P Anjali seems to have taken an opposite lesson in economics. Ignoring the repercussions and fear of retaliation form incumbent players, it moved into markets like a blind elephant. Specifically, it ignored the risk of collusion led price war, increased advertising intensity, and dealer resistance.

Product Portfolio

The products marketed by the company are classified into six verticals. Vertically all the six lines carry a number of products indicative of depth. Further within each product type a number of variations are marketed. The product mix length is indicative of ambitious and aggressive marketing posturing. What is surprising is that all of vertical and horizontal expansion has been achieved in a very short period. P Anjali’s product mix consists of six product lines: food, health, medicine, books and media, home care and personal care.

The surface view of the product mix is indicative of a carpet bombing approach. The company has adopted three dimensional approaches to market participation: side by side horizontal expansion, vertical movement and depth of penetration. This kind of movement goes against the grain of marketing wisdom which exhorts planned and calculated stretch.

A look at the mix shows that each of these lines has high depth. Consider the food product line. It offers a huge food product variety including things that are cooked, used in cooking, used for taste enhancement, used as accompaniment, used as snacks, and consumed directly. Another line is given to the category of health care. Most of these products’ proposition is based on Ayurvedic recommendations. The products in the medicine line are connected together by a common Ayurvedic formulation and herbs base. The personal care lines consist of products that are externally used on body. The company has more or less invaded the entire human body with products meant for hair, eye, face, teeth, and skin. The story does not end here. Most of the product types in the portfolio are offered in several variations including volume and variety. For instance, its toilet soap variations include types based on ingredients like turmeric, aloe vera, sandal, rose and lemon. Further, they are marketed in two sizes of 75 gm and 150 gm. Juices are marketed in 24 variations and hair cleanser and hair oils come in ten variations respectively.

The market growth achieved by quick portfolio expansion is commendable but it can also foster inefficiencies and hurt profitability. A haphazard expansion can breed inconsistencies. The company may suffer from brand inconsistencies on the side of the consumers and inconsistencies at the back end side of production and operations. Can a single brand like P Anjali support a diverse set of products?

Brand Naming

Some discernable patterns are observable in brand naming strategy of P Anjali Ayurveda. The
most visible aspect of its brand naming is that each of its products is linked to corporate brand. This strategy is somewhat similar to many Indian business houses including Tata, Nirma and Godrej. The brand naming strategy could assume to extreme forms. On extreme being when corporate brand is used as product brand. Many electronics and electrical companies have use their corporate brand to market their products. For instance, Dutch Phillips, Korean LG and Samsung and German Siemens hang their corporate many products that they sell. On the other extreme is strategy when each of the products is marketed under a different name with no obvious linkage with corporate identity.

In case of P Anjali, the connection with the corporate name and individual brand name is kept at varying levels of distances. Most of the market entries are prefixed by the word P Anjali irrespective of their market and product domain. At the same time, while referring to any product, the word P Anjali is first pronounced. Consider the following: P Anjali biscuits, P Anjali Honey, P Anjali atta, and P Anjali mustard oil. However in some cases, the corporate name is joined with a name assigned to a category. The company uses the Hindi word corresponding to ‘radiance’ as suffix to market its toothpaste range. For the cosmetic range which includes lotions and face creams, a Hindi word of ‘beauty’ is prefixed with the product descriptor. In case of commodities like rice, atta and honey, the company name P Anjali is used before the name of the commodity like PAnjali atta and rice. The same strategy is followed to market ayurvedic medicines such as PAnjali Lohasava and Gulkand. This is also done for biscuits, noodles, detergents, cooking oil, ghee and spices.

The corporate name ‘P Anjali’ which runs across all market offerings of the company is no ordinary name. The company name is derived from a guru or sage who is credited with the ancient medicine system or ayurveda and yoga. This name of a spiritual teacher is evocative of Indian spiritual tradition and activates sage archetype. Maharishi is a title given to somebody who is master of some spiritual or mystical knowledge. The sage enjoys great respect in Hindu religion. They have been shown to be custodians of wisdom and are instrumental in helping the victorious journey of the hero. P Anjali’s brand is quite distinctive from its MNC counterparts as its name that relates to ancient past. MNCs on the other hand bank upon words that have roots in western culture and language.

It is a kind of paradoxical reality. The consumer culture on the one hand seems to be shifting towards western way of thinking and lifestyles where as P Anjali uses an opposite strategy of using names that have nothing to do western influences.

Corporate Brand Discourse

Communication is integral to brand building. Baba Ram has been crusading against multinational corporations selling products such as cola, pizzas, burgers, beauty products and toothpastes laced with ingredients with harmful effects for long during yoga sessions, television shows and other media conversations. These conversations were logical extension to his yogic mission to making a healthier India. Since many diseases are linked with modern lifestyle and consumption practices especially hypertension, thyroid issues, stomach and diabetes, Baba propagated Indians to embrace yoga to make healthier body and achieve healing through ayurvedic medicine. Baba crusaded for healthy India and brought yoga out of the confines of specialists to the mainstream.

His countrywide yoga camps allow him to interact directly with thousands of people. Baba used media to air proceedings of these camps and reached millions of households. The Baba cultivated a persona of a friendly, down to earth, approachable, selfless, philanthropist,
humanitarian and altruist. His addresses in these camps were in local dialect interspersed with humor which ordinary people could relate with. The perceived earthiness, approachability and humorous style won him millions of followers. Baba’s half covered body in robes saturated in color associated with transcendence, renunciation and divinity won him unparallel belief and trust. In a linear extension his crusade against unhealthy lifestyle Baba raised a tirade against several MNCs. Some products that came under his line of fire were cola, burger, noodles, pizza, toothpaste and cosmetic creams. He contended that these foreign companies lure gullible people into buying by use of misinformation, emotions and imagery. For instance, the images projected in cosmetics are by and large photo edited.

Baba later evolved into an exponent of ‘swadeshi’ or indigenous and urged people to not buy products marketed by foreign companies. He linked these MNCs to East India Company which arrived as a trading entity and ended up enslaving India. He also evokes memory of ‘swadeshi movement in which Mahatma Gandhi urged Indians to boycott British made goods. Baba’s discourse on ‘swadeshi’ stirs sentiments against foreign brands and positions them anti-national.

_Nationalism is normally a dormant feeling. It is generally activated under the conditions of a threat. It is difficult for marketers to sell things on the plank of nationalism, especially during peace. For consumer value is supreme otherwise globalization would not have become a reality._

In one of the recent advertisements of P Anjali, on Independence Day, carried words of freedom fighter Dr Ram Prasad Bismil in which he said that his heart and body are Indian and his shroud should also be Indian. The company urged people to buy its products for India to realize economic freedom. In a very direct attack P Anjali blames MNCs for looting Indians by selling things at exorbitant prices. The company also urges its resellers to provide prominent shelf space and visibility to its products as it helps in promoting self reliance. The company does not limit its attack on MNCs only in terms of origin, plunder, and unjust enrichment rather it also attacks the very foundation on which modern enterprise system is based. It challenges the dichotomy between a business and social enterprise and seeks to amalgamate the two by creating a new category of socio-spiritual-business enterprise.

It extends the concept of shareholders to stakeholders/society. It de-centers profit from the heart and replaces it with larger goodness. It positions itself as altruistic enterprise not committed to earning profit for shareholders rather for promoting greater good by means of yoga and education. P Anjali is an amalgamation of divinity and dignity, modernity and spirituality and wisdom and modern science.

_It is a pretty challenging model which seeks to demolish existing structures based on modernist idea. Baba’s attempt to amalgamate irreconcilable binary of business and social; profit and charity and shareholder and citizens reverses the end and means of business logic. It intuitively makes huge sense but is fraught with challenges at the ground level._

**Product and Brand Proposition**

P Anjali’s success is attributable to its striking a quick connection with consumers. Both product and brand proposition have made it possible. Its offerings combine product functionality with brand’s emotional appeal. P Anjali’s products may not be distinctively superior to competitive brands but it is able to tap into concerns that trouble below the level of consciousness. The company’s claims about superiority of its products like honey, mustard oil, ghee, rice and cosmetics are not substantiated yet consumers have happily adopted them.
The proposition of natural or herbal ingredients coupled with value for money made its products hugely popular. But use of natural ingredients is not something new. There are many brands which claim their naturalness by way of their herbal or ayurvedic formulations.

The proposition of natural or herbal is not new to P Anjali Ayurveda. Many firms already operate in this segment hence they are likely to enjoy first mover perceptual advantage. How does, then, P Anjali make sense when neither its product categories nor proposition is new?

One thing that stands out in P Anjali Ayurveda’s product range is the relative lower price of their products. In many cases, its communication makes very direct price comparison. For instance P Anjali’s Chyawanprash is priced Rs 115 for 500 grams in comparison to Rs 160 for the leader brand, its honey is priced at Rs 135 for 500 grams in relation to Rs 199 for a big, P Anjali shampoo priced at Rs 110 in comparison to Rs 159 for top dandruff shampoo brand. P Anjali’s dishbar and amla hair oil are priced up to thirty three percent cheaper.

The market reality is that the lower priced brands are generally not the market leaders. It is not just the price that determines market success. Had this been true then most markets would have been ruled by the most inexpensive brands.

Low price often creates perception of poor quality. A pure market play on the basis of price is likely to engender price war as price is easy to match. It is the value that wins or loses consumer response.

The lower price signals a brand’s targeting at the lower end of the segment spectrum. But P Anjali is not an economy segment phenomenon rather its appeal cuts across gender, age and income categories. What does, and then explain the success of P Anjali Ayurveda? Are products demonstratively superior to current alternatives?

On the contrary, many of P Anjali Ayurveda’s products have been criticized. For instance, honey marketed by all the companies was found by CSE to have antibiotics including that of P Anjali. Only Hitkari brand was found to be free of multiple antibiotics. Allegations surfaced against cow milk’s ‘desi ghee’ (clarified butter) for the presence of fungus in its bottles. A complaint was filed in Rajasthan against the advertisement of P Anjali’s toothpaste. In another case, Food Safety and Drug Administration found that P Anjali’s atta noodles of substandard quality as its tastemaker contained ash that exceeded three times more the limit of prescribed limit.

It may be simplistic to attribute P Anjali Ayurveda’s success to the twin combination of natural ingredients with low price.

**Communication**

Communication is about what to say and how to deliver. What stands out in P Anjali’s approach to communicating about its products and brands? P Anjali used an adroit approach to communication and persuasion. One thing that stands out is in its communication across products categories is the focus on ingredients’ naturalness and subtle repositioning of other brands as unnatural or synthetic. MNC brands’ communication is generally focuses on user and user imagery. The glossy images and sensorial experiences dominate their advertising.

Another striking difference in P Anjali’s communications is use of ‘all in one’ spokesperson, evangelist and expert. Baba Ram assumes this role in every product’s communication whether it is surface cleaner or detergent or mustard oil. He personally endorses the benefits. The other
brands, on the other hand use expensive spokespersons or celebrity endorsers from the world of sports or cinema.

Marketers hire expensive celebrities or other endorsers to enhance brand appeal and transform user experience but P Anjali’s opposite approach to communication strategy is inexplicable.

Baba Ram is the sole brand endorser whose picture is placed in almost all ads. He looks at the readers in his characteristic smile clad in orange robe and flowing long beard.

Looking at the trend of dawning of Western influences, a person who has adopted spiritual ways of life and given up worldly things is unlikely to be a happening or cool figure to endorse brands. The younger generation is unlikely to identify with somebody with flowing beard draped in orange robe.

Baba Ram dons the mental ‘one man army’ in all meetings with media. Like a true brand ambassador he speaks about second independence, contests loyalty of MNC’s to India and welfare they do. He uses humor and puns to connect with commoners. He explains that the purpose of P Anjali is ‘upkaar’ (welfare) and not ‘vyapaar’ (business).

The fun and humor filled approach may end up as momentary entertainment for people but it can be risky in marketing of products that have health implications.

P Anjali Ayurveda’s approach to advertising has been aggressive. Its products are backed by fully calibrated advertising campaigns. It operates like any other ‘for profit’ company in its marketing. P Anjali is now one of the top most advertisers. Its decibel presence is no less than that of MNCs. It product campaigns are high voltage backed by huge budgets. For instance, their weekly television insertion has been almost doubled to twenty four thousand in week ended on 25 March from first week of January 2016. It was the biggest advertiser in fast moving consumer goods space during Jan 23-29, 2015 according to Broadcast Audience Research Council (1). P Anjali now stands as one of the top most advertisers in the country and its approach is no different from that of MNCs.

A company that has pioneered spiritual, nationalistic, and welfare discourse in business context has a risk of dilution if it begins to appear as typical business entity.

The Challenge

The key to survival in competitive markets is to create fortresses around key brands. Brands must forge deeper psychological connections to create loyalty. In many cases P Anjali’s entry has upset market equation and those who got affected are deep pocket MNC’s. It has directly hit leader brands in categories like toothpaste, honey, hair oil, noodles, ghee and shampoo. In response, the incumbent players are moving cautiously and calculatingly. Some have launched brands to counter PAnjali’s adventure while others are waiting and watching.

There are some who believe P Anjali is unlikely to become significant player in all of the categories it has ventured into. P Anjali rise is a temporary phenomenon. The brand is unlikely to sustain its momentum after the initial euphoria dies down. There are many who believe that its ambitious expansion into different categories would ultimately push the empire to collapse under its own burden.

The stage is all set for an exciting fight in the coliseum of marketing. It is rise of ‘one man army’ against dozens of Goliaths.
What will ultimately happen is difficult to predict or can it be predicted’

References

Terms
P Anjali Ayurveda: P Anjali Ayurveda is the name of a great Hindu spiritual leader. He is believed to be an avatar or divine incarnation of divine serpent of Lord Vishnu. It is believed that he compiled ‘Yoga Sutras’ and is author of ancient system of medicine called Ayurveda. The Yoga Sutras are the basis of techniques used in performing yogic exercises.

Yoga: The term has Sanskrit origin and it literally means ‘to join’ or ‘to yoke’. It is a system that prescribes way of harmonizing body, mind and spirit which ultimately leads to peace and well being. At one level yoga may appear to be all about body postures and physical workout but in reality it involves mental and spiritual practices.

Baba: This word in Indian culture is used to signify a person who is older and respectable. In colloquial sense the people who give up worldly ways of life and engage in religious and spiritual pursuits are called Baba as a mark of respect. They generally sport long beard and drape themselves in orange colored robes.

Figure 1: Product portfolio of P Anjali

<table>
<thead>
<tr>
<th>Food Products</th>
<th>Health Care</th>
<th>Medicine</th>
<th>Book and Media</th>
<th>Home Care</th>
<th>Personal Care</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atta (1), Besan (1), Biscuits (17), Bura (1), Candy (4), Chutney (2), Corn Flakes (4), Dal (Pulses) (19), Dalia (3), Energy Bar (4), Herbal Tea (1), Jam (4), Murabba (5), Mustard Oil (1), Namkeen (2), Natural Sugar (3), Noodles (3), Oats (2), Papad (2), Pickle (2), Rice (7), SoanPapdi (5), Spices (16)</td>
<td>Badam Pak (2), Chayawanprash (5), Digestives (12), Fruit Juice (24), Ghee (3), Health &amp; Wellness (20), Health Drinks (15), Honey (5)</td>
<td>Arishta (10), Asava (10), Bhasma (29), Churan (23), GodhanAark (1), Guggulu (19), Kwath (14), Packages for Diseases (31), Parpati/Ras (18), Pishti (11), Syrup (7), Vati (46)</td>
<td>Audio Cassette (11), Audio CD (9), Books (110), DVD (72), Electronic items (1), MP3 (9), VCD (89)</td>
<td>Agarbatti (13), Dish Wash Bar (1), HawanSamagri (1), Herbal Gulal (1),</td>
<td>Body care (12), Conditioner (6), Detergent cake (4), Detergent powder (11), Eye Care (3), Face cream (14), Face wash (9), Hair Cleanser (10), Hair Oil (10), Shaving Cream (3), Toiletries (16), Toothbrush (6), Toothpaste (7).</td>
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