

The Anatomy of Account Planning

**- The creativity behind the
creativity-**

Henrik Habberstad

1. Introduction

"I can't think of a more exciting time to be in the advertising business"

- John Hegarty -

Today, all large (and quite a few small) European and American advertising agencies have a separate function called account planning. In short, the planner plays an important role in creating a sensitive and deeper understanding of human behaviour – what we call insight. In other words, the planner makes sure that a deeper, holistic understanding of consumer attitudes and reactions are brought to bear at every stage of advertising development (both strategy and creative). Account planners serve as agency catalysts, continually pursuing ideas that grow from an uncommon understanding of and intuition for the connection between the product or brand and people's daily lives. As the agency catalyst, the planner is a fully integrated member of the brand/account team, working closely together with the account manager, the copywriter and the art director. As planners do not write ads themselves, the role of the planning function is to help the people who do, by bringing a consumer perspective to both the development of the overall marketing communications strategy and the creative work. In many ways, account planning can therefore be described as the creativity behind the creativity (or the creative work behind the creative work), simply because, through supporting the creative team, the planner provides it with knowledge of both the product (the brand) and its target audience. The planner enables the creatives to reach an advertising solution with which to promote the product and monitor the effectiveness of the campaign, and provides information for further creative strategies. It is mayhem out there, and the planner needs to make sure that the advertising strategies (and overall thinking) are just as innovative as the creative work.

Planners should constantly be pushing for new ways to create insight and understand consumers and their relations to products, brands and advertising. They use a variety of research methods, both qualitative research (focus groups, observations, one-to-one interviews) and more quantitative data (such as demographic profiles of current brand users).

In summary, the planner is the agency's 'voice of the consumer'; responsible for ensuring that advertising is relevant to the target group, has the desired persuasive impact and is presented in the right media.

To be a good planner, those working in the discipline need a genuine interest in people and a passion (and respect) for their views and inner feelings. Planners must be skilled at using research data, but they definitely also need a strategic and visionary mind, which can translate research findings and insight into great advertising. It should, however, be said that account planning is not an end in itself. Great ads were and still are created without it. Hopefully, planning adds context, perspective, insight, guidance and opinion to advertising development. Consequently, the chances of getting the advertising right the first time are increased. Account planning is also about taking the risk out of advertising. Being creative is a strange process, and what planning does is give a better chance of producing more creative, more effective advertising more often.

2. The birth and historical development of account planning

"I do not accept that there has to be a choice between advertising that is strategically relevant or creatively original"

- Martin Boase -

- Introduction

Account planning is an important advertising agency function that has been carried out in British agencies since the late 1960s. The function focuses on the initial formation of advertising strategy and thereafter the campaign development, through a closer understanding of the clients' final customers or other target(s). From its beginnings, account planning has developed into a job function that exists at the majority of large London advertising agencies. The discipline has also been adopted by some agencies outside London and, more recently, has been transplanted from the UK to advertising agencies in other countries. Advertising (in our case represented by account planning) and archaeology may sound like strange bedfellows. One concerns tapping into the most up-to-date market trends and consumer needs, the other the study of ancient and long-forgotten cultures by excavating relics and remains. In order to create an understanding of what account planning actually is, I found it highly relevant to look at its historical development and research its historical background in the advertising industry in London in the 1960s. Remember the saying: 'Respect your past, enjoy your present and have passion for the future'.

- Account planning: how it all began

You cannot develop relevant advertising, persuade the paying client of its potential and then hope to evaluate it without some sort of planning. Advertising has always been planned and campaigns have always been post-rationalized. People like James Webb Young, Claude Hopkins, Rosser Reeves, David Ogilvy and Bill Bernbach were all superb planners. What was new was the existence in an agency of a separate department whose primary responsibility was planning advertising strategy and evaluating campaigns in accordance with this.

Staveley wrote in 1999, 'The origin of account planning occurred at about the same time in the mid to late 1960s, in two of the leading British advertising agencies, and was in each case the product of a dominant single thinker. The agencies were the J Walter Thompson (JWT) London Office, and the new, very small agency Boase Massimi Pollitt (BMP), now BMB DDB, also in London. It is also worth mentioning that the two dominant personalities involved were JWT's Stephen King and the late Stanley Pollitt of BMP. Apart from a shared emphasis on the consumer, the approach of these two agencies was very different, representing two distinct ideologies. However, both were remarkably successful and have had a profound influence on subsequent advertising practice. Inevitably there has been some dispute about which came first, and which was the better.' (Staveley, 1999)

As Staveley notes, King and Pollitt developed their ideas independently, although they had much in common. The ideas then formulated remain vivid and relevant today, and it is interesting to look at the two approaches to see the many ways in which account planning can be applied effectively.

- The JWT approach

The Thompson T-Plan (today widely known as the Planning Cycle) was developed in the early/mid 1960s. In 1968, the agency discovered that it had been practising this way of thinking for quite a long time with a fair amount of success. A restructuring of the agency was proposed and this is how the idea of creating a new department was born (later given the name 'account planning department'). In an internal JWT document, Stephen King wrote in 1968:

'The reasons for setting up an account planning department were primarily to (1) integrate campaign and media objectives, (2) develop specialist skills in advertising research and planning and (3) link technical planning and its information sources. The main responsibilities of the account planners were to (1) set objectives for creative work, media scheduling and buying, merchandising and to help develop the objectives into action, (2) plan, commission and evaluate advertising research, (3) plan advertising experiments, (4) evaluate advertising and experiments and (5) present work to account groups and clients.' (King, 1968)

And:

'For all these reasons, the JWT version of account planning had a very strong media and single-source research flavour, powerfully underpinned by qualitative studies. Essentially, the agency created an intimate, new, three-person managing team for each of its accounts.' (Staveley, 1999)

The three people mentioned by Staveley were:

- The account director, providing the perspective of the client and the client's marketing strategy, also responsible for executing decisions.
- The creative group head, responsible for the development and implementation of creative ideas.
- The account planner, principally representing the consumer or the group the client wishes to reach, with added responsibilities for advertising research, strategy development and the direction of media planning.

Replacing the agency's marketing department, the account planners were recruited from various sources: from research, from the media, and from the former marketing department itself. This seemed a very interesting combination, with a threefold focus on creativity, media knowledge and marketing objectives. The involvement of the creative team was an important issue for Stephen King, and he was supported throughout by Jeremy Bullmore, head of the agency's creative department.

The T-Plan was created in 1964 and account planning began in 1968. J Walter Thompson's account planning department was set up with King as its first group head and Bullmore as creative director. In many ways, the existing marketing department could not continue as it was: with a huge information department and numerous marketing strategists, the lines between information provision and strategy creation had become blurred. This reorganization made the company appealing to clients intellectual enough to think there should be some sort of research underpinning their advertising.

- The BMP approach

From 1965, Stanley Pollitt, then at Interpublic Group agency Pritchard Wood & Partners in London, had been drawing similar conclusions to his contemporaries and friends at JWT (Staveley, 1999). His legacy to the advertising industry would be a new agency structure revolving around a set of principles which also attracted the title 'account planning'.

Pollitt's ideas blossomed when, in 1968, he helped set up Boase Massimi Pollitt and established what he called a 'consumer alliance', openly adopting the phrase from JWT. The new account planning department at BMP was quite different from that at the London office of JWT. BMP was a tiny agency with no international connections at that stage, but it was soon to develop a reputation for good creative work, thanks to the efforts of the young and very talented John Webster (still with BMP DDB). The aim of BMP was to show that its advertising was both accountable and effective. Martin Boase was once quoted as saying that he did not accept there had to be a choice between strategically relevant and creatively original advertising. This remains something of a mantra within BMP DDB. Consequently, BMP planners became involved in advertising research, and often in fieldwork. Pollitt was concerned about the burgeoning use of quantitative pre-testing methods coming in from the USA. 'He saw these as destructive of truly effective advertising. They prescribed one or other single mechanistic view of how advertising works and imposed rigid norms (interest levels, preference shifts) without any proper dialogue with the consumer.' (Staveley, 1999)

JWT was also aware of these problems, but with its immense authority and intellectual stature it had less need to worry about them. However, 'for Pollitt's small élite, they were an appalling and immediate threat to the excellence he aimed for. Fortunately, an important BMP confectionery client – John Bartle of Cadbury – shared and supported Pollitt's views, and enabled him to realize his particular vision of account planning' (Staveley, 1999). John Bartle was some years later the founding partner of Bartle Bogle Hegarty.

- The difference in thinking between J Walter Thompson and Boase Massimi Pollitt

For Pollitt, the voice of the consumer was of paramount importance, and using consumer research to clarify the issues and enrich the advertising development process was an essential component. When Boase Massimi Pollitt was formed, an account director and an account planner managed each of its three accounts. Both Stanley Pollitt and Stephen King shared a desire to reorganize the media, research and marketing departments; King initially by a process, and Pollitt via a person.

Both were led towards the creation of a new department and a new discipline.

'Getting it right' is, and was, the issue; and in establishing and expanding their planning departments, both Boase Massimi Pollitt and J Walter Thompson charged their planners with adding the dimension of consumer response to the opinions and experience of clients and the intuition of creative people in an effort to make their advertising more effective. Planners were therefore not only involved in strategic development. Here there was a slight difference between the Boase Massimi Pollitt and J Walter Thompson schools of planning: Boase Massimi Pollitt came to place much more emphasis on the role played by planners in working with creative teams and researching rough creative ideas (a role once rather unkindly dubbed 'the ads or creative tweakers') compared with J Walter Thompson's 'grand strategist' (Steel, 1998).

Personally, I believe that any good planner has to be very strong both strategically and creatively, and I will be discussing these matters later in this monograph.

- What actually happened in the British advertising industry in the 1960s?

As we have seen, J Walter Thompson and Boase Massimi Pollitt were the founders of account planning as we know it today and, although their basic principles were similar, their methods of working differed. Nowadays, most planners will have been trained in one or other schools of planning; however, the differences in working have become increasingly blurred as established, traditionally structured agencies have found ways of taking planners on board. In any case, it is interesting to track some changes in marketing and advertising environments that have boosted the considerable growth of planning in agencies (APG, 1999).

1.) Clients' expectations of their agency changed:

'In the 1950s, advertising agencies were the main pioneers of market research programmes. The 1960s brought dramatic change. More and more clients were restructured along marketing lines and part of this was the creation of their own market research departments. They looked to agencies for specialist research advice on advertising matters. Agencies therefore had to concentrate more specifically on the professional development of ads. So the effect of increased client sophistication was:

- Increased demand for distinctive agency discipline

- Decreased need for agencies as market consultants

In a sense, planning therefore became to advertising in agencies what marketing became to sales in the client companies. The planner was charged with ensuring that all the data relevant to key advertising decisions were properly analysed, complemented with new research, and brought to bear on judgements of the creative strategy and appraisal of the ads.' (APG, 1999)

2.) Changes in consumer attitudes were more readily recognized:

'Technology, work ethics, the role of women in society, leisure, lifestyle, social values, catering patterns, racial issues, attitudes to fitness and health and general mood of the times were all constantly changing. Creative people needed to keep in touch. Monitoring cultural and social trends became a specialist task, and the findings needed to be fed in at an early stage of developing new brands as well as new advertisements.' (APG, 1999)

3.) Brand images became more important:

'Social anthropologists say that brands are like people: there is a practical side and an emotional side bringing out personality, images and feelings. All consumer behaviour is an expressive gesture of some sort, and brand symbolism is a special form of language. Whether advertising creates or reflects the images doesn't matter; what is important is that the meaning, sometimes the myth and mystique, behind the brand is understood. To do this, planners have resorted to inventive ways of eliciting consumer attitudes in order to understand the richness of a brand, and how consumers relate to it. Also, as markets became more competitive, brands had to become more sophisticated. Threats like new technology, product parity and own-label brands put more pressure on premium brands to differentiate themselves.' (APG, 1999)

- Later developments of account planning

'The success of account planning at both JWT and BMP became widely recognized by both clients and competitive agencies in Britain. The latter soon adopted and adapted the idea on a wide scale; by 1980, all major agencies in London had account planning systems in place. The 1970s and 1980s were years of expansion for the British advertising business...as agencies grew, account planning became an integral part of their core being, account planning was soon seen as an

advertising discipline in its own right, and agencies began to recruit planners fresh from universities and to train them in house.

On 31 October 1978 account planners formed an influential association, the Account Planning Group UK, which was established to improve and otherwise develop professional practice in the field.' (Staveley, 1999). The APG currently has more than 600 members in the UK and is also well established in the USA and in Germany.

As we will now see, account planning has also travelled abroad and been an essential part of agencies outside Britain.

- Account planning travels to the USA

O'Malley (1999) discussed the way planning moved from the UK to the US. He describes how the pioneer agency in the USA was Chiat/Day (now TBWA/ Chiat/Day). Jay Chiat was a great admirer of British advertising and felt that the reason it was more successful than US advertising was because of the use of account planning. He decided to implement account planning in his agency, and hired Jane Newman, who had started her career at BMP in London. Newman in turn brought over many talented planners from the UK, including M.T. Rainey, Rob White, Nigel Carr and Rosemary Ryan. During the 1980s, Chiat/Day became very successful, being named 'Agency of the Decade' by Advertising Age, and won Gold Lions at Cannes and more Grand Effies (advertising effectiveness awards) than any other agency at that time. Many US agencies copied their approach to account planning, often by hiring Chiat/Day planners or by importing their own from the UK (O'Malley, 1999).

- Issues facing account planning in the USA

In discussing the success of account planning in the USA one has to be careful to distinguish between the successes of the discipline itself and the success of the rhetoric about the discipline. 'The discipline has been hugely successful in small- and medium-sized agencies, but with a few exceptions it has yet to penetrate into large US agencies. The US advertising market is roughly ten times the size of the British advertising market. This difference in scale creates a number of important barriers to account planning, which are particularly acute in large agencies' (O'Malley, 1999). These are:

- A more quantitative business culture
- Large, entrenched, hierarchical, bureaucratic agency and client structures
- Shortage of skilled account planners

In addition, as O'Malley points out, while some people argue that differences between American and European agencies stem from the more quantitative culture in the US, a more obvious distinction is the one of scale. 'Many US clients are understandably reluctant to authorize or recommend to their superiors the expenditure of sometimes tens of millions of dollars based on, as they would see it, a few focus groups. They require reassurance that is altogether more rigorous and "scientific". Numbers always give at least the illusion of precision.' (O'Malley, 1999)

As we have seen, account planning stems from a radically different tradition: one that prizes understanding consumers rather than counting them. As O'Malley so rightly says, 'the challenge in the USA is to ensure that bad or inexperienced planners do not colour overall perceptions of the discipline. Undoubtedly, the debate about the relevance of account planning in the USA will continue for some time. However, in truth, the discipline is already successful and well established because it is a better way to produce advertising. This is not to say that account planning is perfect; it is not, and it will change as it accommodates to a different advertising culture and adapts to the demands of greater scale. The real significance of account planning, however, may be that it can serve as a model for the development of the other non-creative disciplines within the American advertising agency. Perhaps soon we will have business planners and media planners alongside the consumer account planner of today.' (O'Malley, 1999)

- What did account planning achieve in its early years?

In assessing what account planning has achieved in the British and American agencies, the following judgements can be made, neatly summarised by the APG (1999). The presence of a planner on an account has led to more integration within the agency and a greater ability to combine the needs of the client, market and consumer.

'The planner has brought an added dimension of understanding to the process of developing ads by stimulating discussion about purchasing decisions, the brand-consumer relationship and how advertising works in specific circumstances,

helping to win new business by instilling confidence in the prospective client as a result of a comprehensive and disciplined approach.’ (APG, 1999)

The planner has been able to improve strategy, stimulate creativity, champion the needs of consumers and further our understanding of them. It has been shown here that the growth of account planning has been followed by an improvement in the creativity, quality and effectiveness of advertising.

3. A broader and deeper definition of account planning

“At the heart of an effective creative philosophy is the belief that nothing is so powerful as an insight into human nature, what compulsions drive a man, what instincts dominate his actions, even though his language so often camouflages what really motivates him. For if you know these things about a man you can touch him at the core of his being”

- Bill Bernbach -

- Introduction

The late Stanley Pollitt of Boase Massimi Pollitt and Stephen King of J Walter Thompson are, as we have seen, the two forefathers of account planning. In two separate London agencies, but at pretty much the same time, they started a small revolution in the advertising world that has spread from traditional advertising agencies to other marketing communication disciplines, such as direct marketing, PR, design and client research. As John Steel said, “Getting it right” is, and was, the issue; and in establishing and expanding account planning, both BMP and JWT charged their planners with adding the dimension of consumer response to the opinions and experience of clients and the intuition of creative people in an effort to make their advertising more effective.’ (Steel, 1998)

Let us now take a closer look at the account planning function.

- What exactly is account planning?

A large numbers of planners, either working in London, Dublin, New York, Stockholm or Oslo, have been asked what planning is really all about. The simplest answer at this stage seems to be that planning is all about having a consumer focus and through this it adds something to a process – the process of

creating outstanding advertising. We have to look at the planner and how he or she integrates within the team that produces the work, and it is therefore sometimes hard to look at account planning in isolation.

Roughly speaking, account planning is all about three questions:

- Why are we doing any advertising or communication at all?
- Who are we communicating with?
- What should we say and why?

To try to come up with a definition of planning seems to be a nightmare task for any planner and some even go through a whole career without being able to come up with a proper definition of what it is they actually do. However, as Nick Kendall, Group Planning Director of Bartle Bogle Hegarty says, planning in the narrowest sense is about input of research to the process of creating advertising, but if you stop here, you're in trouble. One of the cornerstones of the planning process is to bring in fresh perspectives throughout the entire process. Furthermore, the function is to think about the brand in a creative way; take all the basic data and information, the client brief and all the different input you receive and look at this information in a way that brings fresh perspectives to the process. The reason why this is so important is that there are many brands out there and a lot of advertising. There are also a lot of words out there and what you need if you are going to create good, effective creative work is thinking that redefines the problem in a way that brings fresh perspectives, which in turn brings fresh life to a brand. It is therefore a matter of redefining the problem and helping to make advertising more creative and effective.

- Account planning and agency philosophy

There are a variety of views about this topic, but these three quotes seem to sum up the essence of planning philosophy:

'Conceptually, account planning emphasizes the importance of the target consumers: understanding them, finding advertising strategies that will best fulfil the client's marketing objectives in terms of attitudinal or behavioural response, and then evaluating the advertising developed on this basis, by pre- and post-testing, long-term tracking, etc. Clearly, this consumer focus has to be shared by everyone in the agency, not just the planners who lead it. Such a philosophy also marks out a somewhat changed relationship with the client. Instead of simply mirroring the client's marketing strategy and goals (usually expressed in terms of markets, volumes, brand shares and revenue), the agency provides a

complementary expertise – that directed at an intimate knowledge of the target group. This involves conducting a dialogue with the consumers, and better understanding of who they are, how advertising directed at them will work best, how they use it, and in which media; and afterwards, how well it is doing once a campaign is up and running.’ (Staveley, 1999)

Wendy Gordon, in her book *Goodthinking*, says that, ‘Planning in the UK has grown and evolved, emerging in different ways according to agency philosophy. Some agency planners conduct their own qualitative research, believing that, through their greater understanding of the advertising process and their closer relationships with the creative department, their skills and experience make the qualitative study more directly actionable. Other agency planners prefer to outsource all qualitative research, remaining closely involved and using researchers known to be sympathetic to the needs of advertising agencies and their clients. Some agencies have planners as founding partners and have therefore instilled planning into the core philosophy of the agency, while others do not believe in planning specialization within agencies, preferring to outsource planning skills through planning independents.’ (Gordon, 1999)

Today there are about 300–400 people working with planning in London alone, and the Account Planning Group UK has over 600 UK members. Quite a number of these people have certainly worked for several agencies during their career and have therefore also brought with them experience and methods from one agency to another. All these different agencies seem to have their own definition of planning, but the main purpose is in most cases the same; to help creative staff produce better, more targeted and effective advertising. Or, as Jon Steel from the San Francisco-based agency Goodby Silverstein and Partners puts it: ‘I have always thought that the planner’s task is to create an environment in which great ideas can be conceived, developed and embraced by clients. It is the environment that is important.’ (Steel, 1999)

- Account planning and agency structure

The adoption of account planning means that the agency must change. Planning necessitates new relationships within the agency. Those particularly affected are account handlers, the creative team and media people (whether in the agency or

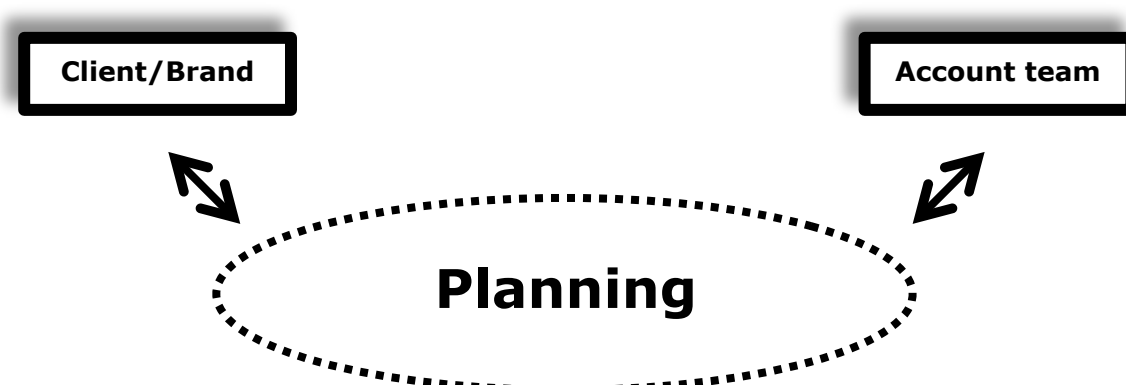
the outsourced function). This can lead to potential problems if those within the agency are not prepared for the introduction of planners to their team. 'The most common reasons for the failure of account planning to take root in a particular agency are (1) if it is arbitrarily added as a sort of 'bolt on' to the existing structure, without allowing for an adjustment of the existing role; and (2) the recruitment (or internal reshuffle) of people without the skill or sensitivity to make good planners.' (Staveley, 1999)

From Abbott Mead Vickers.BBDO's point of view the account handler is the one 'running the show', the creative team comes up with the ideas and the planner is the voice of the consumer.

Another way to illustrate this same view is given by Richard Huntington of HHCL & Partners: the account handler is responsible for making the advertising happen, the creative team is responsible for making the advertising good and the planner is responsible for making the advertising creative and work in a more effective way in the marketplace. In Stanley Pollitt's article 'How I Started Account Planning in Agencies', first published in Campaign in 1979, he describes the departmental relationship as follows: 'The creative man, the new type of planner and the account man, in essentially as a businessman with a flair for advertising, are all likely to have greater equality of status. And all of them are likely to be directly involved with the client. Because of their different mental processes and ways of tackling problems they are likely to work together more in a status of controlled friction than artificial harmony.' (Pollitt, 1979)

- Account planning and its stakeholders

The thesis of this report is that account planning is more about organizational structure and relationship than process and technique, and that the planner's relationship with the project team as a whole is fundamental to his/her effectiveness. It could be argued that the planner (and account planning) has several stakeholders to answer to. These include the account team, the creative team, the client and of course the consumer.





When people try to come up with appropriate models to describe how things work, there seems to be a tendency to place them at the centre. This is also the case with this model, and I should say that the only reason for doing so is simply my aim to create a holistic understanding of the whole process of account planning.

Let us have a look at the role of account planning in relation to all these different stakeholders.

1.) Account planning and account management:

For account people, the relationship is highly rewarding. As Jane Newman says, 'First, it is a peer relationship with a comrade and someone who will share ideas without judgement, not dissimilar to the art director/copywriter relationship. Secondly, it raises the whole level of dialogue on the account several notches and frees account management to take stronger leadership and a more entrepreneurial role. Thirdly, every account person knows that in their past there have been many occasions where advertising has worked and the effect has been accomplished without a planner being involved.'

The work was highly relevant, highly effective and everyone knew exactly why this was so. They also knew that this is not always the case. The account planning discipline ensures that this happens more consistently and thoroughly.' (Newman, 1998)

Planning is not about mechanical processes that can be slotted into an agency. It is about team dynamics and human interaction. 'Without a bond of mutual respect and an openness of communication between a planner and the whole project team, planning cannot work. A planner is the account team's link to the consumer and outside world. He or she is able to bring a strong consumer focus to discussions. To make an effective contribution, the planner is expected to be involved with the account on a day-to-day basis. In addition, planning is a line function independent of account management and creative departments. It is

therefore in the front line, sharing responsibility for the quality of the team's work on challenging the account. These two factors give the account a change in team dynamics decision-making.' (White, 1998)

The account team, just like the creative team, is made up of two individuals approaching the same questions from different perspectives – the account manager/executive and the account planner. Their relationship therefore brings much greater benefits than just 'two heads are better than one', since their clashing approaches eventually bring synergy to the process. The value lies in that both the strategies and creative briefs reflect a deeper, holistic understanding of both the client (goals, corporate culture and vision, sales force, investor issues etc.) and the target consumer (who they are, how they perceive this category, how they adapt advertising, purchase and usage patterns, and so on).

2.) Account planning and the creative team:

'Account planning impacts on the whole creative development process except for production. It has a crucial role during strategy development, driving it forward from the consumer's point of view. During creative development, account planners act as sounding boards for the creative team. They are responsible for researching the advertising before production to make sure it is as relevant as it can be; finally, once the work runs, they monitor its effect in depth with a view to improving it the next time around.' (Newman, 1998)

Not surprisingly, planners need to know a lot about creativity and the creative process, and they definitely need to be comfortable with the fact that creativity is strange, intangible, and often hard to understand. The planning process can add to the creative process by leading the thinking in an inspirational way. 'The creative team wants a single-minded directional brief, not a long list of 'academic talk'. Most good creative teams want to know the consumer beyond a mere demographic definition; they want to know what the consumer wants, rather than what the client wants. A good planner brings this sharply into focus like an expressive photograph.' (APG, 1999)

As the following quote from the APG shows, planners bring to their team a unique way of looking at a project. 'The planner can provide a better service in this context than the account director, who is less skilled at originating and interpreting research, or the independent research supplier who lacks an intimate knowledge of the account and the kind of advertising the agency stands for. His or her sympathy with the creative process can stimulate and discipline creative

thinking; his or her research skill can be used to interpret consumer response with sensitivity and foresight.' (APG, 1999)

The creative team should also have some influence on the nature of the strategic solution. It is important to bear in mind that good creatives are also good strategic thinkers. Often, the problem of planning from a copywriter or art director's point of view is that planners do the research, write the brief and then 'hijack' the creative team. This is clearly wrong.

In my opinion, when the planners hand over the brief, the creative team should already have been involved for quite some time. The relationship with the creative team should be like a game of table tennis, although since planning is an ongoing process, it is natural that the creatives will not be involved the whole way through. However, as soon as work starts on a new campaign, the planner should have meetings with the whole project team every two days.

- Planning as a creative springboard

'For the creative teams, the key benefit of planning is usable research. Not numbers, not arbitrary pre-post switching scores, not a qualitative research report put on their desks, but a person who explains and communicates, who seeks them out to bring them useful insights; a person who can argue conceptually about an idea and how it will work in the marketplace; a person they respect and trust because they know he or she is as passionate about great advertising as they are; and just as importantly, someone who can articulate an idea to others in a way that will help them understand how powerful it could be to consumers.' (Newman, 1998)

As Hilde Oord from J Walter Thompson in London so rightly said in a conversation I had with her, planning can also be defined as the creative springboard, though this is difficult to describe properly because you never actually and precisely know when and where the creative team 'picks up the magic word' which they put into the advert. In the ideal world, planning is all about creating an insight that leads to this creative springboard which gives the team a lead to follow. In the practical world, the planners' product to the creative team is the creative brief and this is their output. This brief needs to inspire in a way that might lead to the trigger word, so therefore the brief needs to be simple, clear and informal. It is actually quite hard to institute how the function works in relation to the creative team and it is very important to know how to manage creative people. Some creative teams

want to talk every morning over a cup of coffee, while others want to be left alone.

- The creative brief: the bridge between strategy and execution

The creative brief is the piece of paper at the heart of the process of briefing the creative team to write the ads. It tells them, succinctly, why they are advertising, whom they are meant to be talking to and what they are meant to be saying. A creative brief is very important because it directs and inspires the creative team's performance. As Vanessa Jackson (Abbot Mead Vickers. BBDO) so eloquently said, giving a creative team a poor brief is like pushing them onto a stage unprepared in front of an unfamiliar audience, and saying 'Look, just entertain them, OK?'

In its simplest terms, the creative brief is the bridge between smart strategic thinking and great advertising (advertising that involves consumers on both a rational and emotional level, and which is capable of affecting a change in both their thoughts and behaviour) and it is the key tool with which planners and their account management partners can unlock the talents and imagination of their agency's creative people.

The main task of a creative brief is not to say 'OK, it's finally time for you creative folks to start work' but to inform the creative team and, most importantly, to inspire them (Steel, 1998).

When writing a creative brief, there are some general rules to be considered. Abbott Mead Vickers.BBDO have the following points to make about writing a brief: (1) be logical. It should all hang together and all of the sections should lead you towards the same conclusions. (2) A brief is a practical tool, not a legal document, so it needs to be flexible and adaptable. (3) It should be sensible, which means broadly sticking to the basic rules that everyone understands; it should be clear and no longer than a page. As AMV.BBDO says: 'Do not use tiny typefaces that people cannot read – use 12 point and save everyone's eyesight. Keep headings basically in the order they are in: it is a bit off-putting when the support comes before the thing it is meant to be supporting.'

Finally, be proud of your work and make sure you sign it.

- The proposition

The proposition is one of the most important elements in the creative brief. It is designed to bring about a change in the consumer's mind, a view or behaviour

regarding the product or brand. In many ways, the proposition can be described as the single most important thing that can be said about a brand being advertised. It can also be defined as the 'creative starter'.

Here, as I see it, are three very good examples of good propositions:

- Tango Apple: 'The Seduction of Real Apples'
- Levi's/Stay-Prest/Flat Eric: 'Staying Sharp'
- Guinness: 'The Ultimate Experiences are Worth Waiting For'

3.) Account planning and the client relationship:

The client is quite clearly vital to the advertising agency, and the two must build a long-term relationship founded on mutual understanding and respect. Agencies must not only be committed to excellence in all their work, despite the constraints of budget, time and client turmoil, but they should also have a deep-seated belief within their organisation that they are in a service business and must remain flexible and responsive to clients' needs. Since the initial concept of account planning was introduced, clients have viewed it as having enormous added value. When talking to some clients (one of them Guinness Ireland Group) about the planning function, the overall impression gained is that good planners have helped them move from A to Z in the creation of advertising with a total understanding of every step, and, most important of all, they provide the insight and clarity needed to advance the discussion from 'I think' to 'I know'.

Planning is, according to Jane Newman (1998) 'more productive and more focused than traditional research'. It is far more than simply advertising. 'A planner should be so in tune with the consumer that he or she can help with packaging, promotion, product development, and even acquisitions, anything the client needs. In a fast-changing category, the planner's very up-to-date knowledge of the consumer can help the client to keep in touch and stay ahead. Finally, because it is a line function it is proactive and "can do"'. (Newman, 1998)

As Cooper (1997) puts it, 'Having a valued input into your client's business will help you create a better relationship with your client, which is in the interest of the agency in the long term.' Cooper goes further to say that the client/agency relationship that develops will lead to more efficient distribution of the budget across the communications means available and better, more effective creative work. Not only that, but by developing such a relationship, the client will have more confidence in the abilities of the creative team and agency as a whole. 'The planner plays a vital role in cementing the agency/client relationship and, therefore, in securing business in the long term.' (Cooper, 1997)

Adam Stagliano, president and director of account planning at the New York-based agency Weiss, Whitten, Stagliano, says that account planning brings the agency closer to the client. 'It has proven its value to advertising. Account planning is not simply the voice of the consumer in the creative product, although it is certainly that; it also brings the consumer perspective to the business planning level and this is what clients are looking for.' (Wolfe, 1994)

4.) Account planning and the consumer:

According to Seth Godin (2000), consumers in the new economy have built up antibodies that resist traditional marketing, creating a need to stop marketing at the consumer and start creating an environment where people can market to one another. This is one of many challenges planners have to bear in mind when they are working out the advertising strategies of the future. Where are the consumers spending their time, and how can we create the most effective communication?

Planning and planner related research is all about talking to real people and what motivates those people in their daily lives. According to Bartle Bogle Hegarty (2001) in London markets and society as such are constantly fragmenting and to succeed a brand needs fame. BBH claims that without fame a brand will neither be trusted nor purchased. It will die. On the other hand the right kind of fame to the right kind of consumer is what results in sales. As planners we therefore constantly need to be working on innovative new ways to get in touch with what people really think and feel about brands, and about the world in general.

According to the APG (2001) advertising is a means of contributing meaning and values that are necessary and useful to people in structuring their lives, their social relationships and their rituals. APG continues to argue that there is no doubt that consumers are now more knowledgeable about advertising and more interested in advertising than ever before. In relation to advertising, consumers are not learning machines and it needs an expert to understand the consumer relationship to advertising. In the APG booklet "Planning in practise" (APG, 1999) they argues that 'general attitudinal models and mechanistic research measures have no role to play in modern advertising culture because they're too blunt an instrument. A famous U.K. researcher likened the housewife in the supermarket to the driver of a motorcar, making hundreds of decisions (mostly sub-conscious) in response to various triggers. Qualitative research has taken on greater significance in understanding the way advertising works on consumers. '

The planner ensures that all interpretations are sound and relevant and presented to the right kind of consumers in the right kind of media.

4. The account planners: who are those guys?

"Our job is to bring the dead facts to life"

- Bill Bernbach -

- Two definitions of an account planner

In the 1992 American Association of Advertising Agencies booklet *What Every Account Executive Should Know About Account Planning*, the account planner is defined as follows: 'A planner is essentially the account team's primary contact with the outside world; the person who, through personal background, knowledge of all the pertinent information, and overall experience, is able to bring a strong consumer focus to all advertising decisions.' (From Wolfe, 1994)

According to a seminar on account planning, held in Stockholm in 1997, by Alan Cooper and Derek Robson from the Account Planning Group UK, a proper definition of an account planner is as follows: 'Planners hold convictions about how the world works, how it has changed and what makes people what they are. The discipline's hook is that it restores to agencies the conceptual high ground which has eroded beneath them, along with advertising's percentage of marketing budgets.' (Cooper & Robson, 1997)

From Alan Cooper's and Derek Robson's point of view, these two definitions contain at least five key elements:

- Consumer focus
- Part of the team
- Knowledge
- All advertising decisions
- Planner, not just planning

However, it leaves out how planners do what they do. As O'Malley puts it, the best planners 'are great generalists able to take a complex mass of disparate information and make it coherent, in other words able to see the wood, not just the trees. Much of the information comes from market research, but an account planner is not simply a type of researcher' (O'Malley, 1999). Researchers are principally concerned with measurement and analysis; planners are more

concerned with insight and synthesis. Research is about what has been and what is; account planning and planners are about what will, could be and what if.

- Account planner caricatures

According to Stephen King (1988), there were two rather different approaches to account planning from the outset, and the range has widened since. He suggests that account planners can be positioned on the following spectrum:

King argues that at the one end of the scale are the 'grand strategists' – intellectuals, perhaps verging on economists, seeking to rise above the fray and see the broader scheme of things. At the other extreme, meanwhile, we find the 'ad tweekers' – more like qualitative researchers, analysing advertisements, handling group discussions and justifying the work of the creative team to clients. As we have seen, the two founding agencies of account planning were Boase Massimi Pollitt and J Walter Thompson. Historically, BMP's planning had roots in its research department and therefore erred towards the right end of the scale, while at JWT, the discipline's origins in the marketing department tended to push the agency left of centre.

The manifold changes in marketing in the three decades since the initial concept of account planning was introduced have pushed account planners towards one or other end of the scale. It could be argued that the external forces (and the evolving marketing and media environment) of clients' needs have moved planners towards the strategic end of King's scale, while the internal changes in the advertising business have moved planners to the tweaking end.

According to M.T. Rainey from Rainey Kelly Campbell Roalfe/Y&R (Rainey, 1998), three caricatures of planners emerged in the 1980s:

- Ad tweekers: planners whose skills lie in helping their agencies develop and sell increasingly entertaining, unexpected and colloquial advertising that appeals to the sophistication of the consumer.
- Storytellers: planners who focus on the front end of the process, giving the fullest possible picture of the product and the consumer in the belief that the secret lies in some quirky detail that will inspire the creative team to create even better advertising.

- Planners: who are knowledgeable about the brand, its competitors and its market structure, who have a close relationship with the client (who considers them to be the fount of all wisdom), but who are comparative strangers to the creative department.

At St. Luke's in London each of the individuals working there is highly intelligent and they are all in the business of solving problems for their clients. The three landmarks of St. Luke's can be described as:

- Definition of the problem
- What are the initial feelings about solving this particular problem?
- What is the best solution?

According to Mark Earls, Planning Director at St. Luke's (now at Ogilvy & Mather in London), the planners' function is therefore three-fold:

- Knowledge: make sure that all that is known about the product, the consumer or anything that is related to the defined problem is shared with the whole project team – especially the creatives.
- Facilitation: use your intelligence and facilitation to find out and describe what validity there is in the findings.
- Logic and clarity: help to explain and clarify the logic of where we are going and why.

Channon's opinion about the process of producing advertising, first published in Admap in 1977, remains true today: '... the various people in the team represent the different skills that are necessary for it to carry out its task. The account planner's skill is not one skill but a combination; this reflects the special combination of functions that he or she has in the process of producing advertising. The first function, from which the job title is derived, is therefore the planning of the objectives of the advertising. The skill here is one of analysis and synthesis, logic and insight. The second function is that of selecting and evaluating the research feedback on the basis of which the team makes its judgements and decisions. The skill here is a technical one of research expertise as adapted to advertising, this expertise being provided with continuity within the account team rather than ad hoc from an external source. The third function is less obvious and that is the planner's responsibility to make the advertising objectives and the feedback relevant and stimulating to the rest of the team, particularly to its creative members.' (Channon, 1977)

- HHCL & Partners' way of thinking about planning

Howell Henry Chalderchott Lury (HHCL) & Partners was voted agency of the decade by Campaign magazine, and this is not without reason. HHCL is the agency behind such strong campaigns as Tango and Guinness Ireland and Iceland. Everyone at HHCL views themselves as professional radicals, and this also reflects their view on how planning works and should work. In an industry where just about every agency has planners, they claim they need something different to maintain their competitive edge. They claim to need planners who have 'radical genes' which gives them the desire to challenge conventions, create strategies that are innovative, anticipatory and competitive, and work closely with clients, creative and account directors to inspire them and change the way they think. The overall responsibility is to help create highly effective work that meets the agreed client and HHCL brief. HHCL & Partners do not think they ask much of their planners.

Apart from challenging everything that they take for granted and demonstrating an intelligence and insight that frankly frightens us, planners at HHCL & Partners need to (HHCL & Partners, 2001):

- Interrogate the client and their market, understand what makes them and their brand special, different and competitive
- Frustrate the competition by identifying all the conventions under which they operate and transform these into weaknesses of archaic thinking
- Inspire the creatives by taking them somewhere they have never been before, opening their eyes to a different way of thinking
- Challenge the consumers by making them question everything they ever thought they knew, wrenching them out of their zone of comfort and familiarity

- The problem of account planning – and the answer to it (?)

The job of a planner is performed by a combination of, say, an account handler and a research expert or an account handler and a marketing expert, with contributions from the creative director and the media planner. Many will argue, of course, that what a planner does is not unique, and they are right. What account planning does is to do it better...because it combines functions that have become distorted by separation. There is nothing obscure or novel about the functions a planner performs in the three stages of the advertising process. Essentially, the planner provides the basis on which advertising for a brand can be developed, implemented and evaluated.

This basis is the development, maintenance and modification of the advertising strategy. The strategy is the response objectives of the advertising, determined by consumers' needs and perceptions in the context of the competitive situation in the marketplace, and constituting a coherent model of the way in which advertising might help to sell a brand.' (Channon, 1978)

To fulfil this role, the planner has to do three things:

- Interpret data, which may be research data but could be and sometimes are data based on conversation and introspection
- Make advertising judgements, because an advertising strategy involves judgement about how advertising in particular might work as well as about how marketing in general might work
- Communicate these interpretations and judgements to the rest of the team, but in a way that is both objective and stimulating

The planner performs these functions because he or she should be both integrated in the team and integrated in themselves and because their performance involves creativity, objectivity and total involvement. This is, and should be, the Holy Grail of account planning.

- The qualitative researcher versus the account planner

As mentioned earlier in this paper, the battle between creative and researcher seems to be a never-ending struggle in most advertising circles, and when we try to define what an account planner does, it usually results in responses such as 'I thought researchers did this' or 'I thought account managers did that'.

As Jane Newman put in her essay on account planning, 'It is much easier to define the role of planning in an agency and to say that the planner ensures that it takes place. Rightly understood, Stanley Pollitt defined the planner as "a trained researcher"; however, first it is important to understand that the qualitative or quantitative researcher (normally from a research institution) is hired just to do the research, he/she delivers a report and then leaves. The account planner knows that collecting accurate, timely knowledge of consumers is only half the job; the other half is explaining it in a way that everyone – client, account management, media and, most importantly, creative people – will act on. Telling the creative team what is relevant to consumers is one thing. Persuading them to

incorporate it in the fundamental premise of their implementation plan is another.' (Newman, 1998)

From a planner's point of view, researchers are passionate about research and account planners are passionate about advertising. The planner is a part of the whole process and an integral part of the team, and therefore also has to create an understanding about what is said and why. In other words, as Merry Baskin put it, the planner develops a broader and deeper understanding of the consumer and about his/her relationship with advertising. The planner's primary role is to champion the consumer's point of view. The core craft of planning is therefore the translation of research evidence into research judgement. Studies relevant to advertising hardly ever speak for themselves and almost always require interpretation based on knowledge of researching skills and advertising techniques. This is where the planner comes into the picture.

- Describing the stereotype account planner

All planners need to share one thing: a great passion for advertising, brands and the ability of communication. A planner must have an interest in people and what actually motivates and stimulates them, both to be able to talk to people and to communicate your findings effectively to the creative team.

The planner's equation (see p. 27) involves insight and ideas, and a planner's job is to provide the key decision-makers at both the agency and the client with all the information they require to make an intelligent decision. It is not up to the planner to make that decision for them. The aim, as far as the planner is concerned, is the production of the best possible advertising to fulfil the client's business objectives – advertising that will stand out from the crowd, say the right things to the right people, and cause them to take some action as a result of seeing or hearing the message.

According to Jon Steel (1998), 'The first skill of the planner's job is to make ideas happen, not necessarily to have those ideas themselves. The second skill is to spend more time listening than talking, whether in conversation with consumers, clients or other agency team members. A good listener will recognize those good ideas and use them, thus allowing others to do the work for him/her. The third attribute is a chameleon-like quality that allows the planner to develop relationships with an extraordinarily diverse group of people. In the space of 24 hours, a planner may be presenting a strategy to the chairman of a Fortune 500 company, moderating a focus group with single, low-income mothers and briefing

a creative team on a new project. It is important that he or she is able to relate to all of them, in order to both gain their trust and understand their points of view.'

The planning equation can be illustrated in this way (Cooper & Robson, 1997):

Insight + Ideas = Effectiveness

- Different skills and approaches

Jon Steel argues the importance of people working in planning having very different views on the world and different approaches to problem solving. In building a planning department in an agency, it is essential to recruit for such diversity. Without it, planners are likely to think and behave in the same way and this in turn will lead to identical solutions and stagnation. Nick Kendall of Bartle Bogle Hegarty, in London, also shares this view. The thing about planning is that it is completely imaginative and completely logical, totally subjective and totally objective, perfectly number-based and perfectly emotion-based all at the same time. The planner is happy to talk to business people and creative people and he or she is driven by the desire to find out what is wrong, but also what is right.

At Abbott Mead Vickers.BBDO they use the 'three Is' to describe the quality of a planner, and these three values should reflect everyone working in the planning department:

- Inquisitive
- Inspiring
- Imaginative/inventive

After talking to a lot of central planning figure in the UK, it seems to me that the ideal planner is both a very analytical person and imaginative, and this can be divided into two characteristics. First, he/she has to be inquisitive and keep digging into the mind of the consumer. Second, he/she needs to be a lateral thinker, because the best solutions are those that are created from a lateral leap and not just the obvious solution.

The planner is the member of the agency's team who is an expert, through background training, experience and attitudes, in working with information, not just with market research but with all the information available, and getting it

used in order to help solve a client's advertising problem. 'The planner's job is to continuously analyse and interpret the available information: its assessment, its uses and, maybe more crucially, its limitations. "Just a re-titled researcher" is not enough. His/her interests, background, the role expected, the personality needed and how he/she is regarded by the rest of the agency are all likely to limit how well he/she fits the part.' (Bartle, 1980)

- Core account planner skills at Bartle Bogle Hegarty

According to Cooper and Robson (1997), planners at Bartle Bogle Hegarty require seven core skills:

- Research: appreciating the pros and cons of research as a tool.
- Drive: continually leading the debate.
- Strategic vision: appreciating the central attributes, definitions and behaviour of client brands, helping the account team understand them and aiding the formation of brand strategy.
- Knowledge: understanding the layout of the market, a brand's (and its competitors') position within it and the state of distribution and trade relations. The account team must be made aware of any information which could improve performance.
- Relationship management: generating confidence in colleagues and keeping the account team motivated.
- Creative vision: improving the likelihood of producing high-quality advertising by focusing the account team's thinking so that it is relevant and useful to the creatives. Planners must be creative catalysts.
- Communication: conveying ideas clearly, constructing reasoned and well-supported arguments and listening to others.

- When has the planner done a really good job?

It was once said that a successful planning process is like falling in love: although it is hard to explain and difficult to describe, you will know when it happens. Successful planning is about creating relevant insight and stimulating great ideas. As a planner, you need to be able to understand what really motivates people and how they connect with brands and advertising.

You also need to sustain the search for unexpected answers. Planning is a combination of finding innovative ways of asking new, brave questions and translating the findings into advertising developments. It is about looking beyond

the 'bleeding obvious'. Therefore, a planner needs to be inquisitive in his/her approach, to ask questions about how things work and, as stated, possess the ability to look beyond the easy and obvious assumption.

The following quotes illustrate this well:

'Planning has done an extremely good job when the insight is written into the advert, i.e. the insight created is actually brought into the ad and the consumers agree with it.' (Doug Edmonds, WCRS London.)

'As a highly skilled planner, you will know if you have done a good job or not. When the creative staff say something like "This brief is really exciting" and ask when they can leave to start work on it, you will feel that you have really contributed to the process.' (Vanella Jackson, Abbot Mead Vickers. BBDO London.)

According to Paul Feldwick of one of the founding planning agencies, BMP DDB, their perspective of planning is that it has done an extremely good job when:

- It provides a new way of looking at the client's situation and problem.
- It creates an insight.
- It creates a picture that makes sense to both the client and the creative team.

The success, or otherwise, of planning will also vary from client to client, because there are always issues that need to be researched and questions that have to be answered. For example, a new campaign to reduce the use of mobile phones when driving is a new subject for people, so how will they react to such a message, and since it is a message from the Government, will the consumer resist this? It is the planner's job to answer questions like these and it is of course hard to gauge whether or not a campaign will be an immediate success.

- Bringing creativity and effectiveness together

As Martin Boase so eloquently remarked earlier in this paper: 'I do not accept that there has to be a choice between advertising that is strategically relevant or creatively original.'

This is one of the main tenets of account planning.

Everyone in the advertising industry should have his or her heart rooted in both creativity and effectiveness. Happily, the two usually go together, though having said that, no procedure exists that can guarantee good creative ideas. Excellent advertising results from a total understanding of both the client's business and its target consumers. One important function of a planner, therefore, is to fuse detective work and inspiration, employing research to help build strategy and to develop and evaluate creative work.

Advertising is not a luxury. It is essential in developing perceptions of a brand and directly affects the client's business. The following statistics suggest that, overall, advertising creativity and effectiveness are mutually supportive:

- Creativity: by the mid-1980s, 11 out of 13 D&AD gold and silver agencies used planning.
- Effectiveness: 63 out of 66 Advertising Effectiveness Award winners were planners.

In 1993, the Account Planning Group UK (APG) established its own award scheme for briefing brilliance, attracting nearly as many entries as that of the IPA. These awards sprung from the APG's desire for people within the industry to recognise and appreciate the work of planners, and their objective is to reward the contribution of insightful planning. The questions that the papers should seek to answer are as follows (Account Planning Group UK, 2001):

- What was the process and evidence of strategic thinking that led to the creative brief?
- How did this extend into creative development?
- Was the creative work original and relevant?
- Did it help to inform and inspire media?

The award recognises the high standard of account planning's contribution to the development of powerful communications and demonstrates how account planning works in practice at top planning agencies. According to Peter Dann, APG vice chair, in the lifetime of these awards the world of account planning and communications in general has changed enormously (Account Planning Group UK, 2001).

While agencies and client companies alike have embraced the discipline of planning, the role of the account planner has expanded to cover planning in an array of different media and across an ever-widening range of types of brands. In

spite of all this, the link between creative planning and great creative work is as critical as ever. The APG vice chair says that the winners will be the ones to show evidence not only of thinking, but also how that thinking led to better creative work. After all, this is what planning is for.

5. The future of account planning: where are we going?

"The problem is never how to get new, innovative thoughts into your mind, but how to get the old ones out. Every mind is a room packed with archaic furniture. You must get rid of the old furniture of what you know, think, and believe before anything new can get in"

- Dee Hock, Founder of VISA International -

- Introduction

Account planning is, as we have seen in the first sections of this paper, based on a simple premise. A client hires an advertising agency to interpret its brand to its target audience. So if anyone needs to understand the target audience in depth, it is the advertising agency. Simply put, this is the *raison d'être* of the account planner. One person, who is charged single-handedly with understanding the target audience and then representing it throughout the entire advertising development process, thereby ensures that the advertising is relevant to the defined target audience in terms of both strategy and implementation.

Things have changed considerably since the initial concept was introduced in the late 1960s and marketing has evolved over the past two decades, as the systems of production and consumption have changed owing to the rapid development of technology. According to post-modern thought, markets are beginning to fragment; yet at the same time they are creating greater challenges for advertisers. Individuals are both isolated and at the same time connected to virtually the whole world via computers. Advertising has been based on a one-to-many communications model for a long time, yet new technology now offers the possibility of a computer-mediated environment – in effect, a virtual world.

Lorge states that, 'Even high-ranking executives in the USA have mixed feelings about the importance of advertising and its effects on their future success. Research firm Edos and Morgan surveyed 1,800 executives for the American Advertising Federation to gauge their attitude to advertising during a time of significant change in the way companies market themselves.

Responses are generally positive about the role of advertising: 90% of the executives agree that advertising drives sales, including 40% who strongly agree; and 70% say they are generally satisfied with their advertising.' (Lorge, 1999). I

am not the Oracle of Delphi, but to examine and understand the future of account planning, it is not enough to just look at the function in isolation. It is important to look at the future role of advertising as a whole, in popular culture, the future of brands, the rise of 'new marketing' and other driving forces that influence the way we think in a complex marketplace.

- Is there a crisis in ad land?

As mentioned earlier, the advertising business has gone through many changes (some quite fundamental) since the creative revolution led by Bill Bernbach in the late 1950s and since account planning was first introduced in 1968. Sir Martin Sorrell (1998), chief executive of WPP Group, one of the largest advertising and marketing services groups in the world, has noted a crisis of confidence in advertising, with three prominent characteristics.

- A greater fear of management consultants:

'Management consultants have the unflattering image of being the sort of people who would borrow your watch in order to tell you the time and then walk off with it. Nowhere is this more apparent than in the world of advertising. The intrusion of management consultants into areas that advertising agencies have felt were their preserve reflects the passing of the era when companies would welcome their advertising agencies' thoughts on just about all aspects of their business: diversification, brand strategy, investment, internal training, presentation, as well as advertising and promotion.' (Sorrell, 1998)

He continues to say that clients expect only creativity from their agencies and that increasingly agencies are providing simply this function. Sorrell points out that consultants have always had more influence than ad agencies in company boardrooms, which gives them certain leverage over board level decisions.

- How to justify your existence:

As mentioned earlier in this paper, for as long as advertising has existed, so has the debate about how to assess its efficacy. This is especially true nowadays, since as marketers are forced by their company boards to offer greater accountability and cost savings, they find their advertising agencies have a myriad of sometimes-conflicting measures for assessing advertising effectiveness. Sorrell again: 'Companies have analysed their internal operations, restructured and re-engineered their products and processes to iron out defects. They expect their advertising agencies to go through the same rigorous self-examination and come up with some answers. Another aspect is that the marketing

communication process is becoming more complex and harder to evaluate.' (Sorrell, 1998)

- Anticipating and planning for the future:

Sorrell suggests that the new wave of smaller and less establishment agencies that have emerged have challenged the status quo. While the traditional agencies offer a myriad of departments, ranging from research, planning, account management, creative, and media planning and buying, these smaller, more anarchic agencies have gained ground with their entrepreneurial and inventive approach. 'They work largely on the premise that clients want to get straight to the creative ideas and do not have the time or patience to deal with the surrounding paraphernalia. Small, flashy and often a touch anarchic in their positioning, these new-wave agencies...will take a client's brief and come back within days with a host of different solutions.' (Sorrell, 1998)

Nobody is suggesting that this means the end of the full service agency, which offers clients a range of services including research, planning, creative development and production, media buying and so on. However, as long as talented advertising people are prepared to take a risk and offer something different, clients will want to team up with them. This new way of thinking includes agencies like Naked Communications, St. Luke's, Mother, Circus, Cake and the recently launched Karmarama (consisting of former creatives from St. Luke's).

- What crisis?

Sorrell's conclusions bear positive implications for the marketing communications sector. In light of the way the business world is changing, Sorrell foresees an environment able to offer the industry many more exciting opportunities. The ever-changing media industry, it should be noted, is one such interesting opportunity, offering the chance to make more innovative use of both strategic thinking and creative vision. According to John Kao, a teacher on a course in creativity at Harvard Business School, the world has witnessed three separate eras of economic activity. First there was agriculture, followed by industry, and then information. Kao claims we are on the threshold of the creative age, where growth will come 'through mastering the skills of creativity and making creativity actionable' (quoted in Sorrell, 1998).

This view has been backed up by Seth Godin (2000), the author of the two best-selling marketing books *Permission Marketing* and *Unleashing the Idea Virus*.

'This much we know: ideas are driving the economy, ideas are making people rich, and most important, ideas are changing the world.'

Another creative giant, John Hegarty, when asked about the new media revolution, was quoted in Ad Week as saying: 'Whatever form, in whatever medium the advertising of the future takes place, one thing is certain, I can't think of a more exciting time to be in the advertising business.'

- The changing role of marketing

The two recent major changes that took place in marketing and communication during the 1990s were:

- As advertisers, we began to use a wide range of media to build brand relationships. The world of communication became so much bigger than just the world of advertising and great changes happened on a global scale, including more active use of websites, digital TV and whole sections of the press that simply did not exist ten years before. We now need to treat media as any contact point between brand and consumer, which allows for a 360 degree view of communication, beyond just ads.
- The world is no longer linear, and advertisers began adopting new, unique and innovative ways of communicating with their target audiences – a kind of holistic approach where the brand is at the centre of the creative process. This also entails a more active use of media as the new kind of creativity, including elements of guerrilla marketing, ambient media and viral marketing.

- Brand identity in the twenty-first century: redefining the world?

The critical issue of the next 100 years of advertising and brands is what role brands will play in developing the world and helping individuals lead more enriching lives.

'The potential is there for brands, brand management and the advertising industry to play a central role in building a better world. It will not just happen though, and marketers will have to broaden their ideas about what they do, how they present their messages to consumers and what the role of a brand is in consumers' lives. In an increasingly uncertain, information-laden world, brands will become more important as trust marks sources of identity for people, stories people choose to believe in and which help make sense of a chaotic world.'

Consumers in the twenty-first century, more than ever, will have to create their own identities. Consumer attitudes and behaviour used to be strictly dictated by social institutions and cultural norms. Those certainties are dissolving. The old certainties such as religion, nationalism, gender roles and life stages have blurred. Consumers today download cues for their sense of self from a multitude of global and local sources – peers, family, teachers, occupation, the media, art and brands. More than ever before, people select, cut and paste to create their identities. Brands must be more than just a set of attributes with a visual identity. Successful future brands will regard themselves as stories people believe in. The heroes of these stories will be ‘anything products’, services, personalities and attitudes.’ (Roberts, 2000)

Planning will play an important role in the context of creating and improving understanding.

- Eight reasons why account planning has become so important

When the Account Planning Group UK held a seminar on account planning in Stockholm in 1997, Alan Cooper and Derek Robson drew up eight reasons why account planning had become so very important (Cooper & Robson, 1997). This seminar was written in 1997 and four years might seem like a long time, but I would say that these eight reasons are just as valid today:

- More competitive marketplace for goods and service
- Changing consumer attitudes (passive to active)
- Gives agency outward focus (consumer perspective adopted throughout)
- Emphasis on development, not selection, of advertising (client on board at start)
- Objectivity
- Better creative briefs (insight and directions)
- Rigour of evaluation and accountability
- Client relations

- The critical challenge of account planning

Since planning is in many ways a rationalized procedure that calls for clear logic where this can be applied and seeking deeper evidence where it is available, there is of course a danger that the creative result could be rationalized – in other words, a kind of advertising that has impeccable relevance but no negligible impact.

As planners do not write ads themselves, the point of the planning function is to help the people who do, by bringing a consumer perspective to both the development of the overall marketing communications strategy and the creative work.

This is important to bear in mind.

It is 'communication mayhem' out there, and the planner needs to make sure that the advertising strategies (and overall thinking) are just as innovative as the creative work. One of the most critical issues of account planning, therefore, is to make objectives and feedback relevant and stimulating for the rest of the team. The insight created by the planner should be a positive factor within the agency, not a kind of 'devil's advocate'. To be successful, the planner needs to work as far as possible with the team rather than separate from it. After all, the positive use of research in establishing a dialogue between the creative team and the consumer is one of the most valuable contributions a planner can make to the production of advertising. This is surely more likely to happen if the planner ensures the learning process is positive rather than negative.

- The role of account planning in the twenty-first century

From my point of view, the role of planning is more important than ever before for many reasons; first and basically that there is mayhem out there. As Morris said in Admap in January of 2000, 'The world is changing as new technology completely transforms the way people are connected. "Communications" is no longer a part of the economy; it is the economy. Its impact will change the way we live and act at a fundamental level and it will certainly change the way the marketing service industry behaves. There are more media, consumed in more ways, by more people than ever before. There are more brands, doing more things, in more places than ever before. There is the same amount of money, in the same pockets, to be spent in the same time as before. For example, the new e-economy is set to change every rule in the media handbook. It will herald a fundamental change in the power of the consumer.'

These changes require the old dog to learn some new tricks.

As Morris says again, 'The old advertising mantra of creating relevant, distinctive and involving messages still holds. However, in the past this was only ever applied to the content of the advertising. In the new media world it will have as

much to do with the context of the message and how the connection is made with the target.' This is the new area of 'connection planning' and it will require more focus and new skills. This is not that new. We have been talking about these paradigm shifts for the past few years. However, against this backdrop, what real changes has the industry made to enable it to help a client in this new world? All these factors are making the role of the account planner more important than ever before.

Let me expound the changes, which will, in my opinion, have a tremendous impact on the advertising business and the role of the planner in the years to come.

1.) More stakeholders:

As mentioned earlier, one of the core functions of the planner is to provide all the involved key decision-makers (within both the agency and the client) with all the information they need to make an intelligent decision. Planning is also, of course, about inspiring the people involved in the process.

The discipline has evolved since the initial concept was introduced, and now includes much more than just advertising. Nowadays, the planner is surrounded by a handful of stakeholders: the account team, the creative team, the client and, most important, the consumer. In the future, though, the stakeholder group will involve more and more people, including representatives from other communication disciplines, such as direct marketing, PR, design, and so on. Therefore, one of the major challenges facing the planner will be that he or she needs to inspire more people at the same time. In addition, the discipline will become more important in areas other than just marketing, for example in issues such as internal affairs and human resources.

2.) Dotcom mania:

The business and media worlds have gone dotcom crazy and more than one million businesses can now be found on the worldwide web. Morris takes the view that, 'While the fundamentals of great brand building remain unchanged, digital communications technology has allowed companies to extend strategic marketing areas such as integrated and relationship marketing. Issues such as speed, reliability and flexibility are also increasingly important for dotcom brands. It is easy to see that the e-revolution will elevate the role of marketing to new levels within companies. New technology will put the consumer right in your face. It will force a new type of transparency to company offerings; the chain between advertiser and the consumer will be so short that any lies will be bounced back

immediately and beamed to everyone else in the target group. Marketing will have to lead companies in this new world. It will be mandatory to understand how this e-world affects all parts of your business and the marketers will need to be as expert about how connections are made with their target market as they are in the content that goes into advertising now. This will demand a major shift in attitude by the marketing profession.' (Morris, 2000)

However, it is also important to see the flip side of the coin. If you want to talk about potential, of course, mention the internet. However, now think back a step as well. As Roberts (2000) so accurately points out, 'More than half the world's population has not even made a phone call yet...the United Nations' definition of development...states that development is the process of increasing people's choices. Development, just as much as brands and advertising, is all about choices. The development of the world is in the interests of every marketer..For every person on the internet there are five in the developing world who cannot read – yet. Among elementary school-age children, 130 million are growing up without access to basic education. This is a critical issue for high-tech brands. If you cannot read, you cannot operate a PC.'

3.) The importance of media planning:

Unbundling was a move to separate the media from the creative process. Early media buyers were dubbed 'gorillas with calculators', because the focus was first of all on buying volume media as cheaply as possible. The creative work was not borne in mind. Sadly, as Morris (2000) points out, media is 'still not at the centre of strategy making. Rather, it is seen as the last leg of the relay, with no other responsibility than to stick its arm out behind it to take the baton over the last hundred yards...it is still content-driven, with no care for the context in which the message is delivered. Is it any wonder that integration remains the Holy Grail for most advertisers?'

So what should we be doing? What solutions have I got to offer to avoid being labelled as yet another member of the babbling classes? According to Derek Morris from Unity in London we need to shift our thinking and see media as salesmen for the company and not just as a mere postman.

'Demand a move away from head counting to understanding how the connection is made. Move media thinking up the agenda. Train your team to be as skilled in managing media as they are in creative content. Build time into the process to get this part right and to allow it to be fed into the development of the creative. Place this thinking at the centre of the marketing process. Demand that the

contribution is vibrant, intelligent and broad. Demand that it be delivered in a non-partisan solution-neutral way, in a form that inspires other members of the team, even if they come from competing methods of communication. If you can create such a service, then integration of messages and the methods of customer connection will quickly follow. Achieve all this and you will be one of the first companies to prosper in this new marketing world and you will gain a lead the competition will find hard to close.' (Morris, 2000)

We now face the situation of the proliferation of new media adding still more complexity to the media landscape. As Franz says in Admap (2000) 'Historical evidence shows that new media do not usually replace old media. Rather, they complement each other. What actually changes is the way in which they are used, the functions they fulfil for the media user and, of course, the individual budget spent on them. A growing number of media will result in more selective media behaviour, because the attention of the media user is limited by time and money. The media choice of the consumer will be more specific than ever before. The options of combining single media in a highly selective and tailor-made individual user package are almost unlimited. A growing number of media also means that the time devoted to a single medium will constantly shrink. Moreover, a complex media landscape will undermine the stability of media habits.'

In this situation the strategic planning of the media mix is becoming even more crucial for effective communication with the target consumer. A wrong decision on the media mix can lead to a serious waste of the advertising budget and of course reduced effectiveness. Not surprisingly, the planner therefore also needs to know more about media than ever before. This will also force planners to use media as a new kind of creativity.

4.) Globalisation of the advertising business:

According to Pavit (2000) the stereotype of the modern consumer lifestyle is set against a backdrop of global culture. 'Terms such as "globalism" and "globalization" abound in any discussion of brands and branded consumer goods, and the mythological power of these terms needs addressing. One assumption is that "uber brands", such as Coca-Cola and McDonalds, have achieved such a global penetration of the market that one can almost expect to encounter them on a Himalayan mountain pass or a military base in the Antarctic. A second assumption is that globalization is an entirely new phenomenon, borne out of late-twentieth-century cultural and economic shifts, rather than a longer historical process. Since Marshall McLuhan's influential concept of the global village first

appeared in the 1960s, the idea of a homogenized global culture has been seen as one of the chief characteristics of the late twentieth century.' (Pavitt, 2000)

According to Simon Anholt, several entirely new kinds of international business are now commonplace in a wide range of industries. Their descriptions, ten years ago, might have sounded paradoxical, or even ludicrous:

- Global start-ups
- Small global businesses
- Global businesses with one office
- Global businesses based in Third World nations

As he says, these are new concepts because, 'in the past, corporations only became global through a slow evolution from simple export marketing, via third-party licences or distributor marketing, to global brand building directly from the country of origin. This could take many decades: many of today's multinationals began their international growth at the beginning of the last century. The advertising industry has followed the same pattern: most international agencies have grown alongside their multinational clients, opening offices in country after country as their clients' businesses expanded. In this way, Lintas built its network on the back of Unilever; McCann Erickson on Esso, Ogilvy & Mather on Shell, Y&R on Kraft, and so forth.' (Anholt, 2000)

This will also affect the way planning works. For example, when working for an international client such as Johnnie Walker, Bartle Bogle Hegarty cannot simply include one country in their research, but must take into account as many as eight or nine. As Cooper (1997) pointed out, 'While this does not mean there is a will or budget for a classically trained planning department in each European or American office, it does mean that head hunters are as busy trying to fill planning slots for accounts with an international dimension and across European offices as they are for local business.'

- From traditional 'account planning' to 'communication planning'

Let's return to the beginning of account planning. When describing the two main caricatures of planners, Stephen King (1988) positioned them as either 'grand strategists' or 'ad tweekers'. Today, most advertising agencies need more than these narrow skills. Good planners should be able to do both, which means they work from the client's needs through to the implementation of the advertising. However, according to Tim Broadbent (1995), even this is not enough any more.

Looking beyond King's 'classical' account planning, the future belongs to what Broadbent calls 'post-recession' planning: 'Clients expect and deserve more planning for their money than J Walter Thompson or Boase Massimi Pollitt dreamed about 33 years ago when account planning was born. Planners must be masters of total brand communication, and all good planners nowadays think communications, not just advertising.'

Richard Block, today Global Planning Director of JWT Europe, shared this view in an article in Campaign (Block, 1994), where he argued that since the information highway connects the world, with all the associated media fragmentation and diversity of message, the future of planning lies in communication planning. I would say we have reached this stage already. The craft skills of old-fashioned planning are just as suitable for disciplines such as sales promotion, design, direct marketing, public relations, product placement, sponsorship and new media as they are for traditional advertising. All these disciplines are based on an application of consumer understanding.

Block (1994) argued that communication planners will number among the linchpins of the modern marketing communications industry, because they will design 'the template for the brand vision blueprint', the all-embracing discipline that seeks to advance the consumer's relationship with a brand in all media, new and old. In the future, the brand vision blueprint will become increasingly dominant. I strongly agree in this view. As Block so eloquently pointed out, the blueprint will set out a co-ordinated brand vision, to be implemented strategically using all the elements of the marketing mix in as wide a market context as possible and delivered tactically in local markets through a complementary mix. When planners learn all about the other skills – media, sales promotion or PR – and apply the planning skills developed for advertising to these other activities to formulate the brand vision blueprint, they will become indispensable. In the future, everyone will be riding down the information highway together with a

strange sense of harmony in a world of competition. Communication planning will affect nearly every brand message.

This is, as I see it, the future of account planning, and I would argue this means the future development of account planning is positive. It should, however, be said that planners across the world need to keep up-to-date when it comes up to the evolution of the business we work in.

I hope I have contributed with this book. Best of luck everyone!

Said about "the anatomy of account planning"

"I feel happy recommend this book to anyone interested in coming into planning, or looking to set up a planning department. It is a very good synthesis of available information on the planning discipline. It is a very good guide to planning, where we have been and how far we have come"

- Janet Grimes Planning Director Wheeland APG Chairman -

"This formidable work will not, of itself, resolve all the internal arguments about account planning. Nothing can - and that delights me. What 'The Anatomy' will do, however, is ensure that the debate is far better informed than it has ever been.

We owe Henrik Habberstad a considerable debt."

- Jeremy Bullmore Non Executive Director WPP Group PLC-

"A very clear and comprehensive window on the world of planning.

Whenever anyone asks me to define planning in the future

I'll just give them a copy of this"

- Nick Kendall Group Planning Director Bartle Bogle Hegarty -

"I read this book with much interest. At last I have the definitive answer for people when they ask... exactly what do account planners do? It is an excellent read, which explains in

clear and simple terms what planning is and what enthuses

and drives advertising planners"

- Vanella Jackson Director of planning Abbot Mead Vickers BBDO -

"Henrik Habberstad has clearly done an enormous amount of research about account planning and talked to a lot of people. I can't believe that there's much remaining about

the topic that haven't been covered; so this will be the most detailed and

comprehensive paper available on planning"

- Stephen King -

"It's very thorough and I think will be a useful document for anyone who wants to understand the origins of account planning"

- Paul Feldwick Executive Planning Director BMP DDB -

"It's extremely interesting reading"

- Roderick White Editor Admap Magazine -

Bibliography

Account Planning Group UK (1999) Editor's Note: What Is Account Planning? 9 June. Account Planning Group UK, London.

Account Planning Group UK (2001) APG 2001 Creative Planning Awards: How to Win Your Award. Account Planning Group UK, London.

Anholt, S. (2000) Updating the international advertising model. Admap June.

Bartle, J. (1980) Account planning: what does it mean and how does it affect the way an agency works? Admap April, 153–157.

Block, R. (1994) The future of planning. Campaign 25 March.

Broadbent, T. (1995) Recession may be the best thing to happen to planners. Campaign June, 27.

Channon, C. (1977) Account planning: threat or promise? Admap July.

Channon, C. (1978) The account planning group and the 'problem' of planning. Admap December, 624–626.

Cooper, A. (1997) How to Plan Advertising, 2nd edn. Account Planning Group UK, London.

Cooper, A. and Robson, D. (1997) The Account Planning Group Seminar, Stockholm.

Franz, G. (2000) Better media planning for integrated communication. Admap January, 42–44

Godin, S. (2000) Unleash your ideavirus. Fast Company August, 115–135.

Gordon, W. (1999) Goodthinking. A Guide to Qualitative Research. Admap Publications, Henley-on-Thames.

- HHCL & Partners (2001) Website www.hhcl.com. January. HHCL & Partners.
- King, S. (1968) Account Planning Department, etc. Internal document, 15 October. J Walter Thompson, London.
- King, S. (1998) Strategic development of brands. APG one-day event.
- Lorge, S. (1999) What's the future of advertising? *Sales and Marketing Management* 151, 84.
- Morris, D. (2000) Where are the media thinkers? *Admap* January.
- Newman, J. (1998) What Is the Client Relationship to Account Planning? *Essays on Account Planning*. 24 September. Account Planning Group US, www.apgus.org
- O'Malley, D. (1999) Account planning: an American perspective. In *The Advertising Business* (John Philip Jones, ed.). Sage Publications, London.
- Pavit, J. (2000) Brand New. Victoria and Albert Museum, London, pp. 47–48.
- Pollitt, S. (1979) How I started account planning in agencies. *Campaign* 20 April, 29–30.
- Rainey, M.T. (1998) On account planning. In *Pocket Advertising* (Caroline Marshall). Economist Books series. Profile Books, London.
- Roberts, K. (2000) Brand identity 2000: redefining the world. *Advertising Age* 70 (49), 50.
- Sorrell, M. (1998) *Essays: crisis in adland? The essentials of the business of advertising*. In *Pocket Advertising* (Caroline Marshall). Economist Books series. Profile Books, London.
- Staveley, N. (1999) Account planning: a British perspective. In *The Advertising Business* (John Philip Jones, ed.). Sage Publications, London.
- Steel, J. (1998) *Truth, Lies and Advertising. The Art of Account Planning*. John Wiley and Sons, New York.

Steel, J. (1999) A simple plan. Adweek 40, 49–64.

White, R. (1998) Planning and its Relationship with Account Management. Essays on

Account Planning. 24 September. Account Planning Group US, www.apgus.org.

Wolfe, J. (1994) Account planning moves up its forces. Agency Magazine Autumn.

