

What in the hell do Planners do?

By Emanuel Basnight

We had this rule of thumb in school that if a child couldn't understand the message your ad was trying to convey then that ad wasn't communicating as clearly as it should. I try to use that rule for all of my communicating, which is why people say I'm a little too simplistic, and for the most part it works. At the start of grad school I asked my professor what was planning what and what did planners do and he didn't have a definitive answer like other disciplines. Psychology is the study of the human behavior, Botany is the study of plant life, Anatomy is the study of the human body, and Pitnology is the study of armpits. Okay that last one was just thrown in there for fun but you get what I'm saying, right? You would think that Account Planning would be the study of accounting or accounts but its not. Not even close.

Account Planning (Planning for short) is a multi-dimensional discipline that aligns the business goals, current business challenge and consumer observations/insights into an actionable solution born from industry and consumer research. The discipline retrieves inspiration from psychology, anthropology, history, marketing research, sociology, creative writing, business administration, brainstorming, current events, and conflict-resolution. This shouldn't be hard to fathom being that all of us who have one job title perform functions created by the particular situation we are in not outlined in our job description. You may be a pizza maker but the few times you had to help with inventory you were temporarily a data analyst.

For a Planner knowledge is currency. Not the brief, not focus groups, and not surveys. Original thinking and the application of it is the most valuable thing a Planner can bring to an account and the creative. This is overlooked and not known to most. Planners have to feed their brains and be stimulated just as much as their creative partners on another floor. Didn't know that did you? Original thinking moves brands forward and that is the mission of the planner. Because knowledge is highly valued this broadens the planner's role and duties from a day-to-day basis because knowledge can come from many sources and exercises. The jack-of-all-trade syndrome a planner goes through daily makes it hard to pinpoint exactly what a planner does because it's not just one thing it's a multitude of things. This multitude of duties can be put into two very distinct buckets- Thinking and Doing.

Doing

These are the exercises or tasks people in the agency see the planner do.

Marketing Researcher- A good planner doesn't speculate or assume anything when it comes to representing the people (consumers) she is charged with speaking for. Therefore everything that passes from her lips must be based on fact and that's why marketing research is so important. The difference between research people and planners (yes there is a difference) is that researchers are only responsible for pulling and passing information to those who inquire. It is not their duty to take the information pulled and put it through cultural, emotional, psychological, economic, and anthropological filters to help solve the business and creative problem. That is the planner's job. Since research is often the first weapon pulled from a planner's arsenal most people, who aren't familiar with what a planner does, often mistake research as the planner's sole responsibility when it is only the visible tip of a giant strategic and creative iceberg.

Quantitative/ Qualitative Research Designer- Its imperative that a planner come in direct contact with the target. Any planner that does not conduct, review, orchestrate, or deal with any quantitative or qualitative consumer research is not a planner. I don't know what they are but a planner isn't it. Secondary research sources such as MRI and Yankelovich offer quantitative information and support to the strategic decision set forth by the planner. Although these services are a remarkable help the insights planners search for don't come from them. When it comes to primary research a planner would usually cooperate with a quantitative or qualitative research vendor for a particular project but it is vital that he knows what it takes to design and orchestrate surveys, focus groups, ethnographies, man on the street intercepts, and in-depth interviews so he is able to stay connected to the observations provided by these research methods which lead to insights.

Data Analyst- This is another one of those duties of a planner that receives a lot of face time. The planner is accountable for the proper reviewing and analyzing of all data from consumer, industry, economic, business, and brand research that leads to the development of the business and creative strategies. This calls for the interrogation of data and perusing it to find the story behind the numbers that can be translated into clear and understandable thinking for the rest of the team. 9 times out of 10, common sense and a bit of intuition are called for.

Brainstorm Facilitator- These have different names in different agencies and businesses but everyone knows what a brainstorm is. It's amazing when a spontaneous brainstorm gets going and everyone chimes in and bounces ideas and challenges off of prior points to make the idea session jump from A to Q in a heartbeat. With the right people involved a brainstorm can be a brilliant moment in the creative process and the right person in charge can definitely add to the brilliance factor. The facilitator will have to be

able to steer the discussion and be one step removed to see the bigger picture and pinpoint the nuggets of good info or insights that someone might stumble upon unknowingly.

Data Implementer- Churning out info is easy. Implementing said information is a completely different story. A planner knows that she has to make the data understandable and actionable for her creative team which often means taking a statistic a step further to illustrate the “why and how” of a situation/challenge/problem instead of just commenting on the problem. Applying the knowledge uncovered is when a planner gets to show what she is made of. This is the when witnesses can serve as a testament to a planner’s worth to the creative process by solving the problem and helping to create the solution.

Creative Brief Writer- The mighty brief. I have another rule of thumb and that is that a brief...hold on for this one...should be brief. As brief as possible and that generally means one page. Whether it’s a communications brief, a promotional brief or a creative brief no one wants to read 5 pages of flapdoodle and there in lies the challenge of writing an informative, inspirational, and intellectual document. A brief is supposed to be as simple, concise, and potent as possible to both educate and inspire creative thought. Most people think this is easy until they take a stab at it.

Knowledge Center- If people want to know something they will ask you. People always ask planners questions and planners either have the answer or say, “I don’t know that right now but I’ll find out.” Knowledge and information are gold and for the agency planners are the gold miners who sometimes have gold on them and/ or they know where to find it. This is why it is important for a planner to read as much as possible and to read everything he can get his hands on. Every piece of information is a bullet ready to hit the strategic target.

Okay. Let’s take a break. So far it’s been 5 pages of reading and I know a bathroom break is in the immediate future. So put this down and daydream, talk about what you’ve read so far or take a number 1 (you know what I mean) then come back.

Good. I’m glad you came back. We have one more section to go.

Thinking

The following are all parts of a planner’s job that are done behind closed doors or in the quietness of his/her own mind

**Problem solver-** At the bones of a planner's job (and all of our jobs in advertising) is that of the problem solver. This is something that requires lots of brain power and creativity because every problem isn't the same and calls for different kinds of thinking and experimenting. Before she can act on the problem first the planner must understand it- all of it. Then she is able to mentally flip it, rotate it, and ask herself the questions that lead to a breakthrough.

**Consumer representation (psychology, anthropology, sociology, and empathy)-**This varies from person to person and from planner to planner depending on his level of empathy. Passion is a motivator and moves the planner to really put himself in the target's shoes to approach the problem from a human (and not consumer) point of view. Keeping an eye on culture, society, and the behavior of people is something that gets easier with more practice and allows for truths about life to be leveraged in creating advertising and products that people desire and deserve.

**Insight miner-** An insight is the act or outcome of grasping the inward or hidden nature of things or of perceiving in an intuitive manner ([www.dictionary.com](http://www.dictionary.com)). When one speaks of human insights they mean the deep, overlooked, and inherent factors of human behavior that we see and deal with everyday. The planner is responsible for leading the charge to uncover these insights and turn them into springboards for creative thought. Insight finding begins on paper but takes place in the mind of the planner. Lots of sleepless nights and hardcore thinking about the consumer, the business, the product, the culture, and the competition is par for the course when one works to uncover an insight that may transform the client's business. The good thing is the more opportunity you have to do this the better you will be.

**Strategy/Positioning development-** People say planners are responsible for the big idea and for the most part they are right. The big idea tends to be based on research and insight that gives people new lenses to see the product and how people relate to it. The strategy and positioning of a brand should be inspirational and invigorating so that people are excited to read it, hear it and talk about it. The development of the strategy and positioning isn't to be taken lightly. For this is the beginning of the creative process and seeing all of the planner's hard work brought to life.

**Original thinker-** Planners are creative. Don't let anyone try to tell you different. One of the cool things about planning is that people mistake planners for the uncreative types so there is always a chance to knock the socks off of someone with some original thinking. One of the bad things about planning is that people mistake planners for the uncreative types so they may not always be open to fresh ways to solve a problem.

Don't fret. New, bold, and non-traditional ways of adding brain power to progress the brand is the planner's secret weapon. This is a chance for the planner to shine and to be as expressive and visual as possible to explain the problem, educate the team, illustrate the strategy/positioning, or change perspectives. The creative process and development of the brand thrive from original thinking.

2 dimensions and 12 sub-dimensions were covered with the intention of explaining what goes on daily for an account planner or strategic planner or brand planner. The discipline of Planning, by nature, isn't simple because it was meant to fill the void between two different functions in the agency (account management and creative) which explains why people still ask (even after reading this probably), "So what exactly is it planners do?" Hopefully after reading this you will be able to answer the question. "Planners do it all." Planning varies from agency to agency due to agency capabilities and philosophies about research but at the heart of the matter is the need to make sure advertising is made the right way for the right people. End of story.