

Account Planning – Threat or Promise What it should involve as a separate agency function

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Account Planning?

When Frank Lowe and Martin Boase crossed swords on who had the best planners and who had the most planners per £ million of billing, as they did last year (see *Campaign*, 12.11.76), there were probably a lot of people in advertising who were not sure what the row was about. Account planning is far from being a self-explanatory term. Out of context it can sound rather rarefied, as if it had something to do with planning the agency's future on an account, or it can simply sound banal — there are, after all, relatively few agencies who would admit to producing *unplanned* advertising. Nevertheless, the precedents for establishing a separate account planning function in London agencies seem to be powerful ones. JWT (J. Walter Thompson), for example, has a long established account planning department and is the *doyen*, as it were, in this field: FCB (Foote Cone & Belding) have had one for some time and French Gold seem to have been recruiting planners as such recently. There are others, of course, including the agency to which I belong. By now, the tally must be sufficient to constitute a trend even though there are still a lot of agencies round town who do not have people called account planners and are apparently happy to stay that way.

The nub of the question is not, of course, whether an agency plans its advertising (most, presumably, do in one way or another) but how it goes about it and, in particular, whether it would plan its advertising better if it had a separate planning function. Some agencies leave it to the account director, and to the agency researcher if and when he or she is called in. Other agencies do identify the function in a separate agency department but broaden its scope to include marketing and research consultancy of a more general kind. These more general activities are a perfectly proper part of an agency's service to client but I am not concerned with them here.

Account planning is a technical term and what it describes is the function which in some agencies provides the discipline of method and the input of research feedback on the basis of which advertising can be developed, executed, and evaluated. Account planning as such, therefore, is only concerned with providing a basis for the agency's prime activity, namely, the 'creation of advertising, and its future in advertising agencies stands or falls by its fitness for this purpose.

Do agencies need account planners?

The process of producing advertising is a team activity. The different people in the team represent the different skills that are necessary for it to carry out its task. The question of whether agencies need account planners has, therefore, three parts to it: is account planning a different skill from others represented in the team; if so, is it a necessary one; and if so, should it be a separate responsibility which is separately represented? The account planner's skill is not one skill but a combination: this reflects the special combination of functions which he or she has in the process of producing advertising.

The first function is one from which the planner gets his title, namely, 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 takes its decisions. The skill here is the technical one of research expertise as adapted to advertising — this experience being provided with continuity within the account team rather than *ad hoc* from outside it. 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. The skill here is one

of sympathy — sympathetic understanding and sympathetic interpretation. It seems likely that individually each of these skills could be found in a good account team even where there is no account planner. However, it is the combination that is distinctive — the idea that the functions which these skills serve, comprise a single responsibility which should be invested in a separate member of the team.

Is account planning a threat to account management?

There is still a feeling among some account directors and executives that account planning trespasses on their territory, that account planning is simply the marketing discipline applied to advertising, and that, if it is taken away from them, there is not much left for them to do but call the cabs and pour the drinks. There seem to be a number of misconceptions here, including the confusion of marketing objectives with advertising objectives, and an apparent downgrading of the leadership role that any team requires and only an account man can provide. In point of fact I am aware of only one agency where account planning appears to have flourished at the expense of the executive side. There is no need for this to happen if the right calibre of account executive is recruited.

To start with, setting the objectives is not purely an exercise in marketing skills. Naturally advertising planning will quarry some of the same sources as marketing but it is addressed to a specialized and distinctive end, namely, the actionable statement of how advertising could and should work for a brand at a particular point in time. Defining the role of advertising not only implies an understanding of the brand and its market but also an understanding of advertising and its potential. It is therefore an advertising judgement that we are seeking. Of course, it is still possible to argue that this judgement properly belongs to the account director or executive as leader of the team. Personally I find it more plausible to believe that leadership implies *ultimate* responsibility for everything but *immediate* responsibility only for the 'external' relationships of the account team ie. the client relationship and feedback, and of course any decision which involves the expenditure of the client's (or the agency's) money. The account director should be in the same objective position in regard to the advertising plan as he is in regard to the advertising execution or the media plan. He is their proprietor and he will be a more effective proprietor if he is not also their author.

Is account planning just a new name for the research department?

Similar arguments apply to the other functions that go to make up the account planning role in an agency. Selecting and evaluating the research feedback for example could be represented as a pure research skill but the fact remains that it is an advertising judgement as well as a research judgement that we are seeking. It is one judgement, not two, and it is best made by someone who is continuously involved in and committed to the process which that judgement affects. Unfortunately some agencies have over reacted to the obvious unsuitability of so many 'pure' researchers to a planning role. I believe that this has led to their undervaluing research expertise as part of the planner armoury. This is a pity.

The difficulty of using research in advertising should never be underestimated. We are constantly obliged to research things we can measure (like the verbal expression of attitudes) in order to estimate things we can't measure (like the mind and heart of our consumer). Very often we are called on to make a judgement as to what we should treat as significant in the findings and what we should discount. It was a big disappointment to me, for example, that the recent BMP (Boase Massimi Pollitt) presentation of their research based approach to advertising development, chaired by David Cowan under the auspices of the IPA (Institute of Practitioners in Advertising), should have said so little about the problem of aiming-off in interpreting the results of this kind of work. BMP have done so much to associate use of account planning with the development of bright advertising that it is difficult to believe that they weren't holding out on us in this respect. Perhaps next time, they'd like to come clean. It would certainly make the advertising research content of their presentation more valuable for their audience.

Using research in the way I have indicated calls for maturity in the planner and an understanding of how research findings can be made to apply to a creative problem. The transition involved is rarely a literal-minded or mechanistic one.

Does account planning swamp creativity?

Because planning is a discipline, a rationalized procedure calling for logic where this can be applied and for evidence where this is available, there is always a danger that it can lead to rationalized advertising — the sort of advertising that has impeccable relevance but negligible real impact. In my opinion the old fashioned marketing-style creative brief was much more likely to lead to this sort of advertising because of the way in which this kind of brief tends to confuse advertising content with advertising responses, to oversimplify the appeal of the brand (often in the direction of rationalized product claims), to pre-judge the issue of just what advertising could and should do for the brand, to confuse the brand on the shelf with the brand in the advertising, and to take for granted the problem of impact (and therefore the creativity which produces it) usually by assuming that impact is only of one kind. *regulation as a*

Of course, confusions of this kind do not necessarily lead to bad advertising. They are not so much untruths as half-truths and half the truth is often good enough. In any case, agencies have a knack of rationalizing their way round a situation which doesn't fit their particular philosophy. Norman Sharam explaining Manikin advertising — to a mildly incredulous IPA audience — as an example of "an applied USP" was an excellent example of how an agency can triumph over its confused thinking but maybe a lot of other good advertising ideas have not been so lucky.

Nevertheless, account planning can fall into the same traps unless it takes very seriously the third function I have talked about which is to make the objectives and the feedback relevant and stimulating to the rest of the team. This function can be identified at two levels, namely, in terms of the planner relationship with the rest of the team and in terms of the actual content of the planning input. To be successful, the planner has to act as much as possible with the team rather than apart from it. The fact that this is time consuming does not mean that it is inefficient in terms of the benefit which is produced. The planner has also to make the learning process for an account team positive rather than negative. This will be more likely to happen if the team is encouraged to use research at the creative development stage as well as at the later stage of evaluating what has finally been produced. 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 process of producing advertising. Simply producing a 'correct' plan will not necessarily have any stimulating effect in itself. Indeed, there is a very real danger that a comprehensive plan can deaden creative response just because it seems to tell the creative team everything about what to do except how to do it. The planner must at all costs avoid the potentially numbing effect of an analysis of objectives produced without prior discussion and in a manner which seems to say "now I've done my job, you go away and do yours".

Is account planning only concerned with product responses?

The problem of making planning genuinely rather than nominally constructive is greatly increased by the narrowness with which the scope of account planning is interpreted by some agencies. Being wheeled in and wheeled out, as it were, like the marketing man or the researcher used to be is no way to be a planner. But this narrowness can and does extend to the advertising plan itself. In some agencies a great deal of planning seems to be based on the idea that the advertising plan should be confined to product responses, i.e. to the responses to the product which it is desired the advertising should achieve. It is of course fundamental to account planning that it is concerned with the responses to advertising and not with the way those responses are achieved. There are many different ways to achieve the same response and generating them is strictly a creative responsibility. However, it is only correct to deduce from all this that planning is confined to *product* responses if we believe that these comprise the sum total of the ways in which advertising can work for a particular brand. But suppose that what the brand has to sell is its advertising property (like Lloyds), suppose that we can't really make

people think differently of the brand but we can make them think differently of the brand as an advertiser (like Esso). suppose that the advertising is a reward which the brand offers (like Guinness posters) — what then?

Product responses are of course always relevant but they are not the only responses which we get when we advertise. We also get advertising responses: our target audience may like our advertising or be dominated by it, it may be amused, impressed, moved, or simply entertained. Over the past ten years or so there has been a widely held (though not universal) view that responses of this kind are unhelpful in advertising planning. This narrow view of what is relevant in response to advertising would not have gained such wide acceptance without containing at least a half truth. To start with it is perfectly true that product relevance is always necessary and sometimes sufficient in advertising (like M & G, for example, or the original Black & Decker Workmate campaign). It is also true that advertising responses of the kind I have instanced are sometimes achieved at the expense of product relevance to the brand, and will in any case be ineffective if they are achieved in isolation from it (examples would be invidious but we all have our favourites). But the fact remains that there are many product fields where the advertising responses are an essential part of what the brand is offering the consumer and indeed they may be the *only* distinctive benefit which the brand can offer.

There is of course no hard and fast line between brands where the advertising is simply concerned to convey brand benefits and those where the advertising is itself the benefit that the brand offers. Many brands hover somewhere in the middle of this spectrum and for them the question of the advertising responses may be adequately covered by determining the values which the advertising has to add to the brand. It is equally true however that there are many situations in which it is artificial and misleading simply to talk of adding values to the brand and creatively much more helpful to start thinking about adding values to the advertising. Just think about the sort of advertising that has impressed you lately and ask yourself honestly how it seems to be working for the brand. Failure even to ask questions about the sort of advertising response we should be seeking can make planning remote and ineffectual as far as creative people are concerned. And most harmful of all, it can lead to the strong and not unfounded impression that when the advertising gets it right it does so in spite of the advertising plan and not because of it.

There are of course dangers in a planner getting 'too close', as it were, to the creative task. The planner is responsible for the objective voice within the account team; his concern is with consumer responses as they are or should be produced by the advertising and as they affect the brand. This responsibility requires both his objective and his sympathetic functions, not one at the expense of the other. Without the sympathetic function the planner won't really be listened to; without the objective function he won't be worth listening to.

Although I believe in a high rather than low view of the role of planning, we must always be clear that good planning doesn't guarantee good advertising — only good creative people can do that. If an agency has good creative people it can produce good advertising by chance or by intuition or by a combination of both. The point is that planning, like marketing, is a discipline. Planning is to advertising, what marketing is to sales. Both processes can be carried on successfully without recourse to their appropriate discipline but the men or the companies who pay for the processes want to know that the success can be repeated. They want to know that those they employ for the purpose can get it right for the right reasons, because that way they stand a better chance of getting it right more than once. The benefit that these disciplines provide is not some notional academic respectability but the promise of greater consistency in performance backed up by a common frame of reference within which the way this performance is achieved can be discussed, evaluated, and, if necessary, corrected. These benefits are real, not merely notional, and the larger and more complex our businesses the more useful they become. That is why marketing as a discipline has already won its acceptance in all but a few fields and why I believe account planning as a discipline will eventually be accepted in all but a few agencies.

Planning Guide – Setting the Response Objectives of the Advertising

What? What distinctive role should consumers feel that our brand plays in their lives?

To whom? How do we define our targets so that we understand why they are prime prospects for advertising?

How?—Responses to the brand as a product

Through awareness? How important is increased awareness as such?

Through identity? How do we want people to feel about the brand in total?—its distinctive associations/identity/personality?

Through motivation? How do we want to motivate consumers *and* how do we want them to rationalize their choice?

How?—Responses to the brand as an advertiser

How do we want people to feel about the advertising as advertising? What values of craft and style are we looking for as such?

Check list of responses based on the above

- Awareness responses
- Functional responses
- Associative responses
- Competitive responses
- Advertising responses