

Account planning: What does it mean and how does it affect the way an agency works?

(Admap, April 1980)

John Bartle
TBWA Ltd

As chairman of the session on account planning at the IPA Conference, John Bartle delivered a keynote talk outlining the history and background of the developments which have led to the establishment in a number of agencies of a specific account planning department arising from a belief on the one hand that some focus is needed for central direction of account strategy deploying specialist skills not always provided by the account handlers, and on the other hand that the agency researcher can be too concerned with research techniques and unable fully to integrate with other agency departments. The account planner, he argues, has the task of bringing together all the appropriate specialist skills, along with his own skills in the understanding of advertising, and at the same time that of working in conjunction with the account handling and creative personnel to ensure that full account is taken of them in developing effective strategies. A separate department, he maintains, which must involve much more than simply retitling the account man, is the only satisfactory way of ensuring that this happens.

Introduction

We have heard already in this Conference about some of the changes in our business since the last IPA Conference in 1972. This session, on account planning, deals with an important structural/organizational development that has taken place in the agency world during this period. Because, while certainly in evidence in 1972 — and, indeed, by then five or six years old — account planning was nothing like as generally developed, as widespread or as much the subject of debate as it is today.

This debate is about Account Planning with a capital 'A' and a capital 'P'. It is about having a *separate* department in an agency called the Account Planning department. And it is about the emergence of a new breed of agency person: the Account Planner.

But are they really a new breed? What do they do? Are they necessary? What *is* all the fuss about? Isn't it just a new, trendy name for a re-launched research department, which agencies have always had? Isn't it what our research department does anyway? How are they different?

Doesn't all advertising need planning — planning what its role is, what it has to do, who it needs to affect, and in what ways? Doesn't all advertising need planning and hasn't it always needed it?

So, since account planning has existed for as long as advertising has — and a heck of a lot longer than account planning departments have — why do you need a separate department? And anyway isn't it a very important part of what account men do?

These are the sorts of questions which are being asked—and increasingly so— about account planning. Account planning departments are relatively new; they are becoming more widespread; they are still developing, especially in the newer agencies. More agencies are setting up such departments (though, unfortunately, in some cases in only the most superficial of ways). And, indeed, the growing importance of account planning has quite recently been given further recognition with the establishing of a separate new agency group, the account planning group, to add its voice to the debate.

So it is certainly a topical, fashionable subject, but much more importantly the quality—and the *consistent* quality—of the creative output from some of the leading account planning agencies—Colletts and BMP for starters (and only modesty stops me adding a third to that list), and the fact that you never hear of any agencies abandoning account planning departments once they have

been adopted, certainly justify a pretty careful appraisal of what it is all about. Or is that creative output purely coincidental?

While I am officially the chairman for this session, I am not being allowed to fulfil that role in the usual way, with lots of authority and no responsibility, because I have actually been twice volunteered — as a contributor first of all and as the chairman rather later.

So it is my job to do some scene-setting—about the development of account planning in the UK — and to give a personal view of what account planning is all about and what and how it contributes to an agency: answering some of the questions I have just posed.

My credentials for doing this — as well as being absent when all the volunteering was going on — are a very close involvement with account planning departments stretching right back to when they started, and the benefit of being one of the, still relatively few, people who has seen account planning in action from both sides of the fence, client and agency. Six or seven years' involvement as a client working with an agency with planners and, at the same time, with a number of agencies without them and the last six or seven years establishing and helping develop account planning as an integral part of a new UK agency.

'Historical' background

Since we incorporated account planning from the start in TBWA London my own preferences are clear. I have no doubts at all that a separate account planning department is one of a number of important elements that make an agency better able to carry out its main job — the developing of outstanding advertising — and the selling of it to its clients.

To help explain why I believe this, I think some historical perspective is useful. Account Planning departments first emerged at a period of time — the mid to late '60s — when a lot of rethinking was going on in agencies about the way they operated. IPA statistics show this as the period — notwithstanding the awful traumas of the mid 1970s—of greatest recent change in our business, at least in terms of the reduction in numbers employed: from 20,000 people in 1966 down to just under 15,000 by 1972 (just under the 1979 figure).

There were a number of reasons for this re-thinking: general economic pressures following the 'never had it so good' days: a growing recognition of flabbiness, over fragmentation and loss of direction in many agencies — it is surely no coincidence that this period saw so many breakaways, in lots of areas, from conventional full service agencies: and the growing sophistication of many clients, at least in terms of their structure, as the more fully embraced the marketing concept — leading to a necessary re-definition of the agency's role. The world was changing and agencies had to change and adapt.

One of the prime candidates for — and recipient of — the change, of the people economies when they came, was the 'traditional' agency research department (and also, where it existed, the separate agency marketing department). In many cases they were found wanting — in part if not in total — and were either drastically trimmed or eliminated altogether. And rightly so too — their deficiencies were all too clear.

They were very largely, and increasingly, peripheral to the agency's internal advertising development process. The agency researcher appeared on the scene only intermittently and invariably at too late a stage — when the executions needed pre-testing — hawking the latest magical technique, with lots of lovely but quite meaningless norms and scores, over-simplifying the complex, intent on testing rather than developing the advertising (too late for that anyway), and much more concerned — or giving the impression of being much more concerned — with research technique rather than with advertising.

So a constant source of friction and tension within the agency: the under-involved, occasional,

uncommitted, very narrow specialist, certainly not playing on the same team as everyone else — whose only contribution always seemed to be a negative one.

And, as well as being increasingly peripheral to the agency's internal workings, the client service aspect of the agency researcher's role was diminishing too. Important in the 1950s as the main pioneers for market research generally, in the context of the broader consultancy role agencies then had, the agency researcher's role was largely duplicated and superseded by the introduction of the clients' own specialists as part of the development of the more sophisticated marketing structures. The agency researcher was left occupying a strange and, increasingly, no-mans-land, between client and agency — and filling a role that time was passing by.

The Account Planner

The account planner emerged against this background. Some agencies, though only a few at that stage, recognised that, in all this cutting back and cutting out, there was a real danger of 'throwing the baby out with the bath-water'. That there was a real need to retain specialist skills in handling information — and increasingly so with the data explosion that was then taking place, data needing very skilful handling to keep it under control and make it usable. And to retain those special skills because of the need for more and more perceptive advertising planning in an increasingly pressurized market place: economic pressures, margin pressures, retailer pressures, in a tight media environment with less and less differentiation between products.

But while there was a real need to retain these skills, very importantly they needed re-directing in a wider, more useful way than hitherto in advertising development and, as it turned out, by and large, this needed to involve a different sort of person to the one employed in the traditional agency research structure. Hence the account planner.

The account planner, then, is that member of the agency's team who is the expert, through background, training experience and attitudes, at working with information and getting it used — not just market research but all the information available to help solve a client's advertising problems. And certainly not just qualitative research information — indeed, the erroneous entangling of the account planning debate with the never-ending, boring qualitative versus quantitative research debate is one of the more unfortunate by-products of planning's development.

The planner's job is the continuous analysis and interpretation of the available information: its assessment, both its uses and, as crucially, maybe more crucially, its limitations. To move the data forward, give it dynamism, to provide illumination, bring it alive, condense it for everyone else involved, not just the creative team, and including the client.

So the account planner, unlike the traditional agency research, is:

- 1) An integral part of the basic agency team — a fundamental and creative part of advertising development;
- 2) As such, involved on a continuous basis with an account — very much in harness with account management;
- 3) Especially important in that area of creative development before the creative team ever put pen to paper: the development of strategy and the creative brief where, after all, the information available to us is so much more useful and reliable, and much less inhibiting, than it is at the, later, execution pre-testing stage;
- 4) The planner is, unapologetically, a person with a point of view — not hiding behind the objective 'voice of a thousand households', but with a point of view developed from all the data, of course, but also from his or her own beliefs, experience and views about advertising. Someone who can inject stimuli and stimulation into the creative process.

Planners fulfil this role by virtue of the skills they bring to bear — and obviously then maintain it

by how well those skills are brought to bear.

These basic research skills, of course, lie in the collecting and analysing of data in a thorough, perceptive and imaginative way but also in the marketing and advertising skills of interpreting data to contribute to moving advertising forward. And, probably most crucial of all, the human relations skills involved in making information understandable and useful to, and used by, everyone else involved, particularly the creative team.

A rare person? Yes, unfortunately — and difficult to find, believe me. Different from the traditional agency researcher? Most certainly — a different role, with substantially different emphasis and a different kind of person.

A new breed? Yes. Justifying a separate department? Yes again I think. While I readily concede that there are genuine all-rounders who combine those skills I have mentioned, plus a few more, which make them outstanding account men, or creative men, or agency general managers who can do the account planning consistently well, they are rare: as rare as the creative man who can produce good work, consistently, on his own and not as part of the writer/art director duo.

And, in their absence and to provide the necessary consistency and discipline, we have to find an alternative. The non-specialist with information, the account man, is not an acceptable enough alternative. He cannot do the job well enough, often enough, on his own. He does not have enough of the skills or background experience.

The re-titled researcher is not enough either. His interests, background, the role expected, the personality needed and the view of him from elsewhere in the agency are all likely to limit how well he can fit the part.

The account planner, very much in harness with the account man, is, to me, the best alternative yet found to meet this ever increasing need for more precise, sharper, better focused advertising planning, to help generate the increasingly imaginative creative response.

The planner works alongside the account man — just like the art director and copywriter — though it is not necessary, in my view, to have the same one-to-one relationship in total numbers or to have permanent teams as one does with creative teams. The planner and account man each has his own area of expertise and experience but with a substantial area of overlap where the two, working together, can create something of which neither, individually, is capable.

While I believe all accounts should have a planner assigned, the level of in-put should, in my view, certainly vary from account to account, depending on an account's needs and on the abilities of the account management involved.

Account planning must be flexible: a disciplined approach, yes, but certainly not 'a system' to be applied identically across all accounts regardless.

Assessment

Undoubtedly an account planning department does fundamentally affect the way an agency works. In my view it makes it work better and produce better work.

There are substantial benefits. I think the direct benefits are primarily internal ones. It helps break down — though not entirely, of course — the traditional research/creative conflict, because of when the 'data contribution' is made, how it is made and the kinds of people making it: involved and committed people helping to develop 'our' advertising.

And it takes research out of the sterile back room and it takes it out 'warts and all' — its

limitations exposed as well as its uses — removing so much of its rigidity and spurious certainty.

While the prime benefits may be internal the client obviously benefits too at the end of the day from account planning, if it is properly applied, from better, more effective work, more consistently. That is by what account planning has to be judged.

And it has the tremendous benefits as well, through adding to the dialogue with client marketing and research people, of unbending them a little, giving them confidence to be a bit more adventurous, a bit less dependent on some 'magic formula' we all know does not exist.

But it is not all plain sailing. Account planning is not simple to get right. It needs constantly working at to get right and it must represent an additional cost, and has to be justified as such, if that crucial planner/account man fusion is to take place. Otherwise it is just a shift of responsibilities between the two — with probably at least as much lost as gained.

That relationship — account man and planner — is just as important as planner and creative. To me it is the new challenge for account planning. It is one of my main preoccupations: optimising the effect of these two elements working together.

The account man must still lead the team. He must still see account planning, without the capitals, as part of his responsibility, and, under no circumstances, abdicate from it.

He must still 'set the pace' both in terms of the client relationship and within the agency. He must orchestrate the advertising development process and have ultimate responsibility for the development of strategy and the creative brief. But now he has skilled help.

It is not about emasculating account men. The best account men I have seen or worked with have been outstanding at working with and 'using' account planners. The better the account man works with planners, the better the account, is my experience.

The key job with planning, above all else, is to ensure that the correct balance between it and the other functions is maintained. The future development of account planning depends totally on this. I genuinely believe that an overdominance of planning could undo all the good work very quickly.

Summary

So let me now summarise what I have been saying:

- All agencies 'do' account planning.
- But the separate account planner role is the best guarantee — in an increasingly competitive environment — of doing it well, *consistently*: and consistency is very much the key word.
- Because the separate department injects important, and increasingly important, skills which improve advertising development.
- Skills which, applied at the right time — particularly to the development of strategy — and in the right way and imaginatively, lead to the production and selling of better work.
- As a result the account planner/account man *combination* functioning properly, can add an *extra* dimension to an agency.
- So, it is *not* enough just to re-title your research department. Its role and the nature of its people are too narrow.
- It is *not* enough to re-title some of your account men or leave account planning solely to them — they have not got the expertise.
- Account planning has tremendous internal benefits if properly applied — though it is an additional cost — particularly in going some way towards redressing the creative/research conflict.

—But it is not without its dangers — balance is crucial. Not just with the creative department, but also with account management: it needs working at and a reallocation of responsibilities between the two is nowhere near enough — from that you do not get the something extra.

Finally, two thoughts: the things I think are most important about account planning's development for our business as a whole for the 1980s. Firstly, as research becomes increasingly important, increasingly used by and relied on by so many clients (so often as an alternative to using any judgement at all) an account planning structure, while bringing research to centre stage, also puts it into perspective, with full awareness of its limitations and a concentration on its positive and sensitive use — trying to avoid the unquestioning, rigid, dominating way it is so often used, which has such an inhibiting impact on creativity and imagination. Relevance — traditionally represented by research — and creative distinctiveness can and must co-exist. Account planning can help bring them together, and make clients believe it.

And, secondly, here is a development where the UK leads the way. Even the briefest visit to the USA indicates how creatively barren most of their advertising field now is: the price paid not just for all those legal regulations, but also for *excessive* reliance on research unchallenged: on day-after-recall; on only evaluating advertising in a short-term, one-off way; on the formulistic approach — it is the price of lots of tails wagging the dog. Account planning may just offer part of our salvation from this. It may be one way of preserving our 'individuality'.