

*Bartle Bogle Hegarty*

.....  
BARTLE BOGLE HEGARTY LIMITED

Account Planning Group : One Day Event  
1st November 1983

TODAY'S CONCERNS : TOMORROW'S DANGERS - PLANNING MYOPIA

John Bartle, Bartle Bogle Hegarty Ltd

INTRODUCTION

At the IPA Conference in Stratford in 1980 I presented a paper on Account Planning. My brief now is partly to up-date the personal view I gave then - how I see account planning now - but also to look ahead, to speculate, as to how it might further develop.

In doing this, one certainly isn't short of material; a great deal has happened since 1980. That very short period of three or four years has seen some very dramatic changes in the account planning world.

On the face of it, all the developments have been positive, so all should be sweetness and light . . . and yet!

The title I've taken for this paper uses words like 'concerns' and 'dangers' because I am concerned that we do not all delude ourselves into thinking things are much healthier than they actually are.

The danger is that we ignore a new disease that I believe is breaking out; it is called 'planning myopia'.

It is not as virulent or as frightening as herpes or a.i.d.s. but it does arrive on the scene equally suddenly, can certainly be transmitted from one person to another, and, in my view, can quickly reach epidemic proportions - which would be very nasty indeed.

Fortunately I also think it is early days: I think we can catch the disease before it starts to spread. But my main worry is that I am not sure many people have yet recognised this disease and its potential dangers, and will not until it's too late.

I would like to present the symptoms as I see them and, more importantly, the cure; because I think the cure is very largely in the hands of account planners themselves.

### Recent Developments

The 'patient' - account planning - certainly looks remarkably fit and strong.

It is easy to forget that it was only as recently as 1979 that the late and lamented Stanley Pollitt in a Campaign article called 'How I started Account Planning in Agencies', was writing:

"Account Planning and Account Planners have become part of agency jargon over recent years. I've been able to track down about ten agencies currently using them. There's even a new pressure group called the Account Planning Group."

Just consider what's happened since then.

Hardly any new agency now starts without account planning represented from the start or very near to it.

There's been a lot of progress in the established agencies too. The spotlight that shone so bright in the 70's is now dimmed and the magical transformation from 'research' through 'research and planning' to 'account planning' can now take place very quietly and easily. 'Deed poll' planning lives!

The account planning world has bred a completely new animal: the planning independent. Under one of their auspices we have had another first; an ad associating account planning strength with award winning advertising. An ad which, itself, won a creative award.

Now we are exporting our talent to the USA. Slowly but surely, to the home of advertising, go some UK trail-blazers; (hopefully to give a flavour of what makes UK advertising so much admired nowadays and not to find more perceptive ways to interpret those day-after-recall scores).

There's been the development of the Account Planning Group itself. From just over one hundred members in 1979 to just under four hundred now.

There are all those planning articles in Admap and Campaign; the IPA has published a booklet on Account Planning; and, where oh where would the IPA Effectiveness Awards be without the account planning community!

All of that has happened in the last three or four years and it's a lot of change. It has been coming for much longer than that - ten or fifteen years preparing the ground by just a few agencies to get to Stanley Pollitt's 'about ten' in 1979 - but it's only in these last few years that the 'explosion' has really taken place.

#### Where We Are Now - Apparently

What it all adds up to is that now, all of a sudden, account planning is part of the agency 'establishment'. It is no longer that rather quirky thing nobody understands, which a few agencies have and the rest try to dismiss as either unnecessary or exactly what they are doing anyway. It is now the non-account planning agencies that look old-fashioned and defensive.

It's interesting to speculate on what really tipped the balance, and opened the flood-gates.

The cynic might say it was when those established agencies suddenly 'tumbled' that all you had to do was say you'd got planning, maybe recruit a couple of people, and then work out what you did with it!

Or maybe it was the idea that you would get TV commercials like John Webster's and press ads like David Abbott's if you just got hold of some of this 'planning thing'.

But I would say that it was the rush of successful new agencies, all by definition non-establishment, but all with account planning, which tipped the balance, and made planning 'establishment'. I actually think the wrong conclusion was drawn - a straight-line association between planning, highly creative output and apparent success - but it was drawn nonetheless.

Not only is account planning now part of the establishment it is that rarity in this day and age: a growth industry.

You have seen the APG membership figures and there are lots of people climbing on the band-wagon. There are more and more people called account planners around but, as the head-hunters continue to tell you, there's never enough. Demand exceeds supply, which is very good news for all account planners; the 'price of planning' continues to rise.

It is all too easy to forget what it really was like, not all that long ago. The questions and the debates about account planning seem to have gone away. Its very existence is rarely questioned now; it is apparently accepted more and more across the other agency disciplines; we don't hear much nowadays about how it is emasculating account management; we no longer have those shrill criticisms about 'bolt-on' planning.

That's what the 70's were like. Easy to forget and, for many account planners, a time they never actually knew.

So apparently, all is set fair. And, presumably, when one looks ahead, all one can see is more of the same, all the problems gone away.

I for one don't think so.

#### Where We Are Now - Really

I actually don't think the patient is as healthy as he looks. Indeed I think there is a bit of 'emperor's new clothes' about account planning at the moment. A lot of the success is more apparent than real. I do not think the concerns and problems have gone away, just gone underground.

I do not think we have gone from atheists to believers quite so quickly or so generally as maybe appears. I would say we are in the agnostic phase and we should recognise this.

As I have made clear already, this is a personal view. But I believe it is one with substance.

It's derived, as it must be, from observation and discussion but you do get a lot of both of these things when you start all over again as I did quite recently. Though you obviously should be re-thinking and re-assessing all the time, as we all know, it usually takes something rather dramatic to really focus the attention.

This is obviously particularly so when the last thing you want to do is simply 'clone' what you've been doing before. So you meet and talk to, and indeed recruit, a lot of new people, across all the agency disciplines. This, and the new situation you are in anyway, does force the re-think, make you step back from the cosy and familiar, and perhaps give you a clearer perspective of what's actually happening.

A quite different view of account planning can emerge. It goes something like this.

Account Planning is the latest fashion. Yes it seems widely accepted but it is really only grudgingly so. It has introduced a new breed of well paid, or over-paid, individuals who assume guru-like status and power, through a sort of intellectual arrogance, a belief in their monopoly of understanding. At worst they can 'rip-off' the naive agencies who feel they have to have some of this, apparently all-powerful, panacea.

They actually see themselves, these planners, as the pivotal point in advertising development. Account men are actually left confused as to what they're supposed to do: Who writes the brief? Who does the briefing? Who polices the work? And creative people see it all as 'four group discussions' and being patronised by very young and inexperienced 'up-starts'. But the discontent is now just vague mumblings and rumblings because planning's got power and nowadays you don't challenge it.

And the Account Planning Group within this? A self-preservation society. Inward-looking, self-congratulatory and all about self-perpetuation.

All in all, the 'pride' than can come before the 'fall'.

It is an extreme point of view of course. An exaggeration to make a point. (And of course it's not like that in your agency!)

But I think there's a lot of truth in a lot of it. More than most of us would care to admit. And my prime concern is that I don't think it's any less true than the 'sweetness and light' view which seems to me, in everything I see, hear and read, to be held by so many people in the account planning fraternity.

It is this lack of awareness which I have christened 'planning myopia'.

### Planning Myopia

It is the dangers of self-deception. Dangers that have been spelled out before, in relation to marketing, in a lucid, compelling and now classic article, written in 1960 by Theodore Levitt and called 'Marketing Myopia', Hence my title today.

Reviewing numerous examples of US industries, and in making the strongest possible case for the marketing approach, for vision and for adaptability, he wrote:

'In truth there is no such thing as a growth industry, I believe . . . Industries that assume themselves to be riding some automatic growth escalator inevitably descend into stagnation. The history of every dead and dying 'growth' industry shows a self-deceiving cycle of bountiful expansion and undetected decay.'

As we view our little 'growth industry' I think we should bear those comments in mind.

Of course Levitt had a lot of advantages, not least his academic title, the authority of Harvard and the Harvard Business Review and the whole history of US industry from which to gather his examples of how it can all go wrong if myopia sets in.

I do not have any of that but I do have one great advantage. Because account planning is still very much in its infancy and something can actually be done about its myopia before it becomes a real problem.

But the absence of both Levitt - like authority and the painful lessons of history does mean that my 'message' can be much more easily dismissed as just one person's view and a mis-guided, over alarmist one at that. I am certain that it is not.

I think there are a number of questions account planners have to answer, to their own individual satisfactions, to decide whether or not I am right.

First of all, does the problem exist? Is planning myopia real. Is it tomorrow's danger? Is account planning in general deceiving itself? In Levitt's words, is it 'bountiful expansion' harbouring 'undetected decay'?

My contention is that planning myopia does exist and potentially it is a considerable danger. The gap between planning's view of itself and the external view is just too wide.

I do not think we're at the decay stage or anything like it but we will be unless we take action to avoid it.

If the problem does exist, does it matter?

The answer to that must be 'yes it does'. It is not about doing it apparently successfully it is about doing it right. And doing it right is what the long-term healthiness of account planning is going to be all about.

If, at heart, account planning is all about helping to get the creative work better can we honestly say that has happened in the last few years alongside the planning explosion. Or do we just duck the issue by debating what 'better' means.

And when I read some of those, often excellent, things written by planners, and then think about the work their agencies produce, it makes me realise that there is another gap, and sometimes it's huge, between our theory and our practice.

So, as I look ahead, I am not as bullish and optimistic as many seem to be. My 'nightmare', if you like is that the debate will come back, the private debate will become public again, but the questions will be different. Not, should we have planners and what do they do but, because they are, quite properly, an additional cost, what have they achieved to justify their cost.

My fear is that, if we are not careful, in general, account planning will be found lacking against the expectations raised in others by the account planners themselves. That is 'tomorrow's danger'.

The challenge is, not so much to be able to answer the question but, through the way planners act and contribute, make sure it never needs to be asked.

The fate of all those agency researchers in the late 60's and the 70's should serve as a constant reminder of how easy it is to come unstuck, how easily things change. The price of planning myopia would be a similar fate.

So, the next and final question. What needs to be done to cure planning myopia?

### What Needs To Be Done

Sadly I do not think there is an easy answer because I think the answer lies in both self-examination and, if you like, 'self-medication' by every individual who calls him or herself an account planner.

Because I think the key thing that is going wrong, certainly as far as planning's public face is concerned, and the real danger we face, is that we are forgetting what planning is really all about.

It is not, in my view, primarily about systems and procedures, generally applied, but about individuals, and their inter-relationships, individually developed.

We need to constantly remind ourselves that account planning developed in recognition of just how difficult the doing and selling of outstanding advertising is. How it was getting more and more difficult as consumers got more and more sophisticated in relation to advertising; as the advertising environment got more and more cluttered; and as the traditional research techniques and traditional agency researchers got less and less helpful.

Great for relevance; but relevance was no longer enough. Great for those universal simplistic theories of how advertising works; but not for the real world of complexity and diversity. Great when money was no object; but not when value for money is the key.

If we remind ourselves of that - planning being bred from difficulty and uncertainty - then we surely can, and must, resist now making it a 'system' and a set of procedures to be applied to all problems, at all times, by implication, across all agencies.

Isn't there a real danger with the reflex adoption of the 'four group discussion and animatics' response that we're actually swapping one formula - the reduction to number and norms - for another?

Stephen King in his Market Research Society Conference paper this year said:

'Advertising research is an unusual type in that as often as not the research method is chosen first and the problem to be solved is only sorted out afterwards, if indeed at all.'

How many of us, hand on heart, can really deny that, even in this brave new world of account planning, this isn't still too often too true.

Isn't there a further danger that standard systems and procedures lead almost inexorably to rigidity in thinking and formula in advertising? Isn't the implicit certainty the very antithesis of creativity and the very antithesis of how account planning should contribute?

Let us also remind ourselves that planning was never conceived to be about organisation and structure either; about demarcation lines and ultra specialisation. That is what the old-style agency researchers were all about.

We should surely heed the lesson of marketing here: people forgetting that 'marketing' was first and foremost an attitude of mind and thinking it was a structure called 'product' or 'brand management', within which are the seeds for short-term thinking, defensiveness and brand devaluation.

So, if it is not about systems, procedures and organisation let us remind ourselves what it is about - the people; who they are, what they're like and how they do what they do.

(By all means let us have the debates about how many planners you should have to account men, whether or not you should do your own research, who should write the brief: they are interesting issues but I do not think they are fundamental.)

What is fundamental is how each planner contributes individually to his or her individual agency. They have their jobs because their agencies have planners, they do their jobs because of who they are and how they act. They have the right to speak, they have a responsibility to make their contribution, but they have to earn the right to be influential.

It is not, in my view, about the divine right of status or power. I do not think that is any different from any other function within an agency.

As I said at that IPA Stratford Conference:

'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 over-dominance of planning could undo all the good work very quickly.'

I still totally believe this. I think it is all about the individuals concerned and the recognition of a number of realities.

Recognising that outstanding ads were done before account planning and are now done without them; that advertising development is a 'process of people' no one of whom, by right, warrants more regard than any other and whose inter-relationship (given talent of course) makes the difference between the mediocre, the good and the outstanding.

Recognising that there is no monopoly of wisdom or ideas just a group of people with different skills, abilities, experience and personalities trying very hard, together to get as near as they can to the right answer to a series of specific, different from each other, problems.

Recognising, most of all, that account planning is not an end in itself.

I think that account planning, whilst in all cases, hopefully, adding context, perspective, guidance and opinion to advertising development, should be different in character between agencies. It is about different people as planners, different people in other disciplines, different Clients, different problems and all these 'differents' over time. It is why the cure for planning myopia is not a miracle one; it is private and individual not public.

It is why in assessing how right account planning is, to me the first consideration is how it's viewed within an agency - how well it's contributing (difficult to quantify of course, but certainly 'felt') in relation to its cost - and not how it is viewed by Clients or as a new business tool.

That is why, in the last analysis, nothing is going to be more important for the future health of account planning than the human relations skills of account planners. Nothing is going to be more important than sensitivity and awareness, not just of the outside world but of how the internal world ticks too. Despite planning's frequent involvement in numbers, measurement and 'scientificness', because of its newness, it actually has to be the most flexible and adaptable of all the agency disciplines. Less what you do more how you do it.

Mutual respect and inter-relationships are the key. That is about individuals. No amount of systems, procedures or whatever can deliver it. That is what I think we are forgetting so often when I hear planners speak and read what they write.

I think it is being forgotten because it's very difficult to do and to 'get hold of'. Systems and procedures are simpler, more easily defined, repeatable over time, not dependent on individuals. They confer status and, to a degree, power.

But I do not believe it is about making things simpler, it's about making them right. Not certainty, systems and power through status but uncertainty, people and contributions through individuals. That is precisely what went wrong with agency researchers in the 60's and early 70's - decline through over-claim, rejection, lack of involvement and non-contribution.

I do, of course, readily concede that it's very difficult to get it totally right where a planning presence isn't embodied right at the top in agency philosophy and personnel - a much more common occurrence than many admit, I think - or where other parts of the agency are not as strong as one might wish, particularly the creative area. But I do not think they are an excuse for not trying.

The objective is clear. To, individually, be seen as an involved, questioning, contributing and welcome part of the team. Not gurus, not dominant. Not sub-ordinated either. Not separate, not complacent; just a natural addition that makes the internal wheels turn better.

And an important and integrated part of the team. If it's just a way of doing cheap group discussions, or providing additional new business resources, or just an extension of the Clients marketing department, or there because everyone else has it, then we have got problems. It is not about 'deed poll planning' and it is not about a straight line from planning input to creative output.

At the end of the day it is about others in the agency saying 'I'm glad we've got so-and so and so-and-so, they help' because that means planning helps, and we are getting it right.

### Summary

What I have tried to argue is as follows.

Account planning should not rest on its laurels, it has still to win them. There is no room for complacency.

This is not to deny that a lot has been achieved - a lot of good new people for the business, more subtlety in the debate, greater consistency achieved and generally a lot more 'air' let in to the deliberations - it is just to say how easy it is to delude ourselves and be self-satisfied. Planning myopia.

If the fifteen years or so from 1965 laid the foundations, the last three or four have just built the base. The job has now to be done. If we recognise account planning is still in its infancy, is in the 'agnostic' phase and not without its problems, then there is a chance that the job will be well done.

What each account planner has to decide is how he or she can help the cause. If they accept the diagnosis, the cure for myopia is in their hands.

I started with a title in part derived from Theodore Levitt. He extolled the very virtues I think account planning needs: flexibility, adaptability, self-examination, 'forward-thinkingness', the need to develop or decline. I think he should bring us to a close. He wrote:

'An expanding market keeps the manufacturer from having to think very hard or imaginatively. If thinking is an intellectual response to a problem, then the absence of a problem leads to the absence of thinking. If your product has an automatically expanding market, then you will not give much thought to how to expand it.'

Please let us apply the lessons from 'marketing myopia' to account planning. Let us not deny the problems. Let us not be devalued by others by over-valuing ourselves. Let us do the thinking.

Let us not let 'planning myopia' grow and undo all the good that has been done.