

The Thoughts of
Chairman Bert

The Account Planner : Prophet, Prostitute or Pragmatist?

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Before I begin to speak on my topic, I'd like to make one thing clear: it might seem to some of you from my title that I have certain reservations about planning and what it can do for advertising output. This is not true: I am not anti-planning and nor is Masius. Indeed, I have instituted a planning system at Masius. But I do have very distinct ideas about what constitutes true planning. And, as you will see, I therefore have a considerable number of reservations about some of the people who call themselves planners — and whether they are capable of fulfilling the planning role as I see it.

What, you may ask, does the Chairman of an advertising agency know about the ins and outs of planning — particularly one who was once himself a researcher, and who is thus tarred forever with a non-planner brush? Well, in the best traditions of research, I tried to find out some facts on which to base my opinions, and am therefore able to present you with the findings of a confidential industry report. My research has revealed three basic Schools of Planning.

First, the 'brought-up-to-believe' School who seem to me to be still a relatively small part of the whole — since most planners are still people who undergo a 'conversion', having joined a planning unit from another part of the research or advertising business rather than people who have, from the cradle, been brought up as planners. Very few agencies can be said to have done this coherently and consistently, and BMP is certainly the agency which springs to mind as the pioneer in this area. My research suggests that, by and large, this is an effective system which produces effective planners on the basis that they are bright and well-trained. And it is not only my research, but also my experience, since we have in the Masius Research Department people who have worked in the BMP Planning Unit. But what works in one agency is not necessarily what works in another: between us and BMP there are vast disparities of scale and vast disparities of history and tradition. So, whilst I have some respect for the 'brought-up-to-believe' School, I do not think it the only way to achieve planning, nor do I think it necessarily the best, particularly in an agency of our size.

Turning to the second School of planning which I distinguish, I think of this as the Atheist turned Jesuit School. This contains by far the majority of self-styled planners, and it is here that I see some of the worst excesses of planning being manifested: I shall describe these later.

The trouble with this category, both in defining and criticising it, is that it contains a wide span of experience and ability. On the one hand, we have people with years of experience in the business who are undoubtedly effective and do make a contribution to their agencies. But, as a group, they appear to have built up a mystique around themselves, and a piousness towards and vociferousness about the ideals of planning which, though not necessarily damaging to themselves or their agencies, is potentially damaging to the image of planners. Why? Because the rest of this category of planners consists of people who are either less talented or experienced (or both) who join in the mystique created by these luminaries and, I suspect, find themselves attempting to fulfil roles which they are simply not equipped to fulfil.

The third School of planners is the atheists – or those who are considered to be atheists by the pious. I would put us in this School along with some other leading agencies. But the pious make a misjudgement: it is not that we are atheists; it is simply that we have moved on from the concept of religion.

Having gone through my broad research findings, let me turn to the detail. As far as I can see The Great Planning Debate seems already to have been going on for as long as the Thirty Years War – and with about the same degree of clarity as to who is fighting whom and with what objective – or even what the rules of engagement are. To the outside observer, the Debate must have all the intrinsic meaning, elegance and subtlety that the spectacle of a cricket match has for a Frenchman: who is in reality desperately wondering why the players keep moving their positions after every six balls, why they sometimes change position before the six balls are over merely because one player holds his 'baton' a different way round from another and why the whole thing is made to drag out over 3 days before a minimal audience when it could probably all be sorted out in time for a good lunch. It is a world of arcane signs, rituals and dances, a world with apparently no beginning and no end in view.

However, let us assume that this outside observer, this Frenchman watching a cricket match, is of an enquiring disposition and prepared to suspend his prejudices. (Those of you with Agencies who have French offices will have difficulty in conjuring up this image, but let's assume it anyway). Let us assume that he is prepared to take as read that the participants in the game are intelligent, skilled, inventive, sensitive, imaginative etc., etc – all those things that everyone knows all planners to be – and that he accepts that they are doing something that has some point to it. Suppose he tries to find out exactly what that is. Suppose he approaches one of the participants and asks him exactly what he is doing and why, and that he's not prepared to accept answers like "I'm bowling leg spinners round the wicket to the left hander and trying to pitch them in the rough outside his off stump." Will he manage to get any other sort of answers?

I suspect he will: he'll get a plethora of answers. But that most of them will be about minor points of technique and orientation, and that he'll be little the wiser about what the broad objectives and processes are.

The point is that, to the outsider, the business of planning looks even more worrying and confusing than cricket does to the French. And the closest analogy is perhaps to the politics of the Hard Left. To actual members of the Socialist League, the precise theology of what differentiates them from the Socialist Organiser Alliance, the Workers' Socialist League, the Socialist Labour League and the Socialist Workers' Party is no doubt both important and fascinating. To the bemused outsider, differences in theology between factions he's never heard of, on issues he's never thought critical, aren't simply irrelevant, but positively destructive — the whole tendency being to obscure behind a wall of stridency any coherent and common policy which may exist.

It seems to me that the same situation obtains in the Planning industry and that it matters. Indeed, it matters precisely because the detailed and unresolved arguments about who can be a planner and what he should believe militate against the idea of a coherent industry. Arguments about whether it is against the canon of planning law if planners don't run their own group discussions; opinions as to whether people called researchers could actually tread the sacred ground of planning; expressions of pious support for narrative tapes versus animatics are all interesting bases for pub discussions, but they're hardly the basis for an industry manifesto.

Why do I think it matters if planning doesn't present itself coherently? For a variety of reasons, but the one which is of most central and gripping interest to people who are involved in planning is that of self-interest. An uncharitable outsider — for instance, an Account Man — might take the view that a planner is merely a politicised and clever kind of researcher relaunched at a premium price. If he is a bright Account Man, this probably doesn't disturb him: he may even welcome it. But if, as is less statistically likely these days, he is one of the Great Unbrained, he is going to be disturbed both at the advent of "cleverness", and particularly at the premium price! What does he do: lack of brain does not preclude abundance of cunning — he naturally launches a 'no-nonsense-you-can-afford-it-and-you-will-understand-it' brand, for which there is a market in any Agency. And the planner is forced into the business of justifying his premium-priced, more powerful, positioning. But we all know what can happen to premium-priced brands if they have no advertising support — in the case of planners no recognised and old-established industry basis; we all know what can happen to premium-priced brands if they have a high out-of-stock ratio, which, when remedied, normally results in a price increase — the combination of expense and unavailability of staff is hardly favourable to planning;

and we all know what can happen if the premium-priced brand turns out to be no more than a commodity brand in disguise — we've all heard of people with 2 years' research experience who are branded 'Senior Planner'.

The danger is obvious. Unless planning itself defines what it is and wants to be, and does this in a unified rather than factious fashion; unless it justifies this on an industry-wide basis; and unless it itself attempts to provide the resources necessary to fulfil its self-defined role — at a realistic even if premium price — it will die. It will die just as Marketing Departments did. Or it will die by being absorbed back into the power structure of the Account Groups — as has already begun to happen at some of our more snazzy agencies.

So what should planning be, what are planners about? Prophets, prostitutes or pragmatists? Well, first let me say that as an ex-researcher, I have no qualifications at all to answer this question. We live a very quiet life here in the Grocery in St James's Square — surrounded by our multi-million pound and equally quiescent Clients. We're very cut off from the real world of the Glass Bead Game of planning. We've not caught up with the idea of calling our researchers planners; we're still commissioning boring old things like special analyses of TCA data to try to understand buyer behaviour before we write creative strategies; and we pay outsiders called qualitative researchers to do our group discussions. So, it's a bit much for me to be talking to you about Planning. But I'll have a go, anyway — though I should warn you in advance that the answer to prophets, prostitutes or pragmatists is likely to be 'Yes' and 'No' in each case.

So the planner as prophet. Certainly, planning needs — and the planner must be — something of a visionary, an advocate of the true way. But while planning needs the visionary element of the prophet. there are, I suspect, two aspects of the prophet which are a potential problem: the first is that he is not always right; the second is an unfortunate tendency, as history shows, to get up people's noses by the vehemence of his prophesy. My vision of the hairshirted school of planning is that the planner, clad only in credit card, goes out into the wilderness (which is either Soho, Covent Garden or, if you're really unlucky, Paddington), remains there for 40 lunches and 40 dinners and comes back with the one true answer. A sceptical world cannot protest: this man has been through hell and haute cuisine. How could he be wrong? But my question, if I were the end user of his planning efforts, would be 'Why should he be right?' And I would ask this question for two reasons: first, because I believe that most advertising problems are susceptible to more than one solution, and that it is the duty of those whose job it is to find solutions to think widely and consider a variety of solutions before they settle firmly on one; secondly, because I think that the odds on the answer

being right -- and the likelihood that the thinking behind the answer has ranged widely -- are greatly increased if the answer is not the product of one man speaking vehemently from the wilderness of his intellectual preoccupations, but the product of a variety of intelligences thinking simultaneously and cohesively about the problem. So rather than a prophet, I prefer to think of the planner as provocateur: as a man who is within the group responsible for the advertising and owns allegiance to it; but who simultaneously owes allegiance to an abstract ideal -- that of thinking -- which he uses to goad the group from within. The key disadvantage of this approach is that the role of provocateur -- with its split allegiances -- is in fact a more difficult one than that of the prophet. It requires all the talents of the prophet plus the additional talents of being able to convince ones peers that a course of action is fruitful and of being able to motivate them to follow it. And it requires a deal of flexibility not often found in prophets.

However, the advantages seem to me to outweigh this disadvantage. I've already mentioned the greater likelihood of the right course of action being divined by the planner as provocateur within the group rather than by the planner as the prophet. I've also made a passing reference to the prophet as a pain. It seems to me that anything which reduces the risk of the planner being perceived as a pain is in the self-interest of planning and planners: and the group planning system has the advantage of bringing this about precisely because the checks and balances of a team operation simply don't allow a team member to be a pain -- or not for long, anyway. Those of you who see planning as an extension of the Hollywood star system and who wait to take your rightful place in the firmament may not like that idea. But it's worth remembering that prophets, and not just those who get it wrong, have a habit of coming to a sticky end. In these days when the market shortage has increased the cost of planning co-incidentally with a squeeze on Agency margins, the planner prophet could end up being nailed to the cross of profitability.

So, not a prophet, but a provocateur. What about prostitutes? At first sight, the planner as prostitute may seem to be at the opposite end of the spectrum from the planner as prophet. But I doubt if this is true in reality. In just the same way as it takes two to have sex (or maybe more, these days), it takes two to make a prophecy self-fulfilling. And the natural recourse of the prophetic planner who has announced the coming of the Godhead might well be to get into bed with a Creative Director of similar persuasion and, irrespective of the real quality of the resulting orgasmic production, to announce it as the glorious result of his prophecy. So the prophetic planner might well prostitute his services in a mutual conspiracy of ego-maintenance with the Creative Department. But even this form of closet creativity where the planner and creative director have a

prostitutional relationship strikes me as better than what I fear may often happen – which is when the relationship between creative and planning ceases to be symbiotic and becomes purely parasitic. Let me describe such a parasitic relationship. Prophets, whatever their disadvantages, are at least normally people with experience, with stature. By definition, there are not many of these people about: you know the labour market for planners as well as I do. But there are even fewer people about who represent the ideal, the golden mean – people who have stature and experience but who do not get up people's noses and are able to influence and motivate teams. The consequence is that every Agency is in danger of recruiting into its Planning or Research Department people who, however talented, do not yet have the experience or stature to stand up to the strong personalities which the Creative Directors will undoubtedly be: I have already talked about people with a couple of years' experience who are called Senior Planners. So what happens to these people? They have to plan because that's their job; and to plan effectively they have to influence creative people to whose experience they cannot usually hold a candle. The obvious temptation is to exist as a parasite on the back of the Creative Department; to massage the ego of the significant creative people; to create a thinking framework which enables the creative people to justify what they want to do – whether it's right or not; and to hope to God that when you get kicked out of bed you are at least paid the wages of sin and congratulated on your contortionist skill. Of course, I'm here partly highlighting an industry problem – that of a shortage of resource – to which I'll return later. But I think I'm also warning of a closet relationship which I think can easily come to exist between creative and planning, and which is potentially destructive. How to get the relationship out of the closet? Again, the planning team approach in which the planner and creative members are only two members out of four, the other members representing account group and media, can provide the necessary checks and balances and prevent unfruitful conspiracy. Even in today's enlightened sexual times, it is difficult to see how four members can become simultaneously intertwined.

This is not to say that I do not believe that planning needs to go out of its way to encourage creativity. Clearly it does, since that is the whole point. And it is certainly true that the different modus operandi of different creative people must to a certain extent be allowed to dictate the exact nature of how planning happens on a piece of business. But the question here is not the exact detail of how the planning happens: planners have to be prepared to introduce the kind of flexibility which seems necessary. The question is more one of the tonality of the relationship between planning and creative. As I've said, this should not be prostitutional; it cannot be allowed to be parasitic. But perhaps if we substitute partner for prostitute we are getting nearer to it: a relationship which is not venal or narcissistic

but which comes out of closeness, loyalty and the desire to get on with it together.

So: the planner as provocateur and partner. What about pragmatism? The problem here is that pragmatism, whilst being a word which sounds as straightforward as its assumed meaning, is in fact an elusive concept. It does not simply mean the quality of being down-to-earth. It means two slightly differing things: the first is the quality of realism and far-sightedness which enables an individual to predict the practical consequences of a course of action. In this respect the pragmatist might be thought of as the successful visionary: the man who has already got into the pub and is drinking his beer whilst his brother, the prophetic visionary, is still urging teetotallers to go to the pub and doesn't get there himself until after closing-time. This, I am sure, is a condition to which all planners worth their salt aspire. In addition, this quality of knowing or intuiting the practical outcome of a course of action is a rare one – probably rarer than the ability to work fruitfully with creative people – but an absolutely fundamental one. The history of marketing and advertising is littered with cases of failure caused almost entirely by the lack of ability of the people concerned to see that what they were proposing to do had no chance of working in practice. And, paradoxically, it is often the most hard-nosed of marketing men who inhabit this ivory tower built on insane enthusiasm to go out and do something, irrespective of its chances of success. But, as we all know, it is the hard-nosed marketing men who move accounts around, precisely when their schemes have failed. The planner, if he possesses far-sighted realism, can be a powerful antidote to the launching of insane schemes, and it is here, with the basic understanding of what **can** be done with a Client's brand and, equally importantly, what **can't** be that his role begins – way before he starts to be the provocateur of the planning team or the partner of the Creative Department. Not only is the role of the far-sighted realist one which the planner **could** fulfil, it is also one which he actively should strive to fulfil. Because if he becomes the guardian of a brand in the sense that he is seen as the man who fundamentally understands its development in the market and its role for the Company, he begins to occupy a quite different political position. He begins to reflect the other definition of pragmatism I alluded to earlier: that of the man of business, rather than the man of affairs with the Creative Department. In short, he becomes a professional, which subsumes all his other roles as provocateur, partner and pragmatist.

The establishment of planning as a profession, and of planners as professionals, seems to me critical if they are to survive in an ever-tougher world, and I think that certain things have to be done if planning is to emerge as a recognised part of the advertising industry amongst people at the other end of the telescope.

First, planners have to stop bickering between themselves about what divides them, decide on what unites them and state it clearly. I suggest that in doing so, they have to evolve a working discipline which defines the tasks and scope of planning. In my view, a proper planning discipline would have to incorporate the following stages:

- a proper definition of what the business problem is and what the role of advertising is in solving it. This implies both a catholic knowledge of the market and its problems, and a visionary ability to foresee what advertising might achieve in practical terms: where it will enable business to be taken from, and so on.
- working from the market model, the discipline would go on to define the exact nature of the consumer target that has to be influenced if the business objectives were to be achieved. It would do this first of all **quantitatively**: in order to scrutinise the realism of the business objectives. It would then change gear and do it **qualitatively**, creating a personification of the target that was both "resonant" enough for the planner himself to be able to assess the limits placed on brand positioning by the target's nature and requirements; and fertile enough for the creative people to work with.
- working from target and the business objectives, the next stage of the discipline would be to state in precise terms the focus for advertising in relation to the brand – the essential message – and the triggers which were likely to be influential in focussing the message in the mind of the target.
- working from everything that had gone before, the discipline would demand an integrated media plan.

Now, the point about this discipline is that it incorporates and demands many facets of knowledge and talent.

In terms of talent, it requires, at different stages of its evolution people who are intelligent, logical, pragmatic, inventive, imaginative, sensitive, buttoned-down and lateral. In terms of knowledge, it demands people who have a good acquaintance with the theory of marketing, people who understand practical marketing, people who know how to create and use quantified consumer research, people who understand the nuance of qualitative research, people with an intimate knowledge of the media scene and, above all, people who understand advertising. This brings me on to the second task which I think the planning industry has to undertake. Because I suggest to you that the varied qualities I've outlined are never found in equal measure in the same individual, (or, if they are, he or she rapidly becomes something much more exalted than a planner).

Which means that if the contribution planning can make is to be maximised and the best talents to be utilised there is a distinct need for establishing planning via **planning teams** rather than by individuals known as planners – which is what we've done at Masius. This, the maximisation of the quality of contribution, is to me the single greatest argument for planning team versus individual – though the team as a mechanism for lessening the elements of prostitution and prophecy I regard as powerful secondary arguments.

But the establishment of planning as a teamsport does have an implication for how the planning profession presents itself. It means that it has to regard itself and to position itself much less parochially than it has, in my view, up to now. It has to admit that planning demands a wide range of talents that cannot be found in one man. And, in doing so, it has to deny the role of the narrowly-focussed prophet and open not only its doors, but its embrace, to people who have not had a classical research or planning background, but who may be account people, media people or even creative people by training. This would not simply increase the proficiency of planning by encouraging different talents to flourish, different perspectives to be brought to bear on the problem. It would additionally help solve the nagging problem of the **resource base** of the profession.

This resource base, its extent and quality, is the third issue which I think the planning industry has to do something about itself if it is to develop into a profession as opposed to a phase. Those running planning departments cannot expect Agency managements to keep handing out ever larger sums of money to purchase mediocre and unrounded talent merely on the plea that market conditions demand it. Of course, we'll pay for the combination of intelligence, imagination etc., etc., when we're convinced it's there. But we all know that there isn't enough of it currently to go round and the planning industry has to try to increase its own resource base for the future by redefining the job of intelligent people from other disciplines.

So, let me summarise. You have to believe in planning: it's like prose – it's a fundamental fabric of our business which there is no possibility of denying. Thus, the questions become 'What is it?' and 'Who does it?'

On the question of what planning is, I will leave you with two thoughts. The first is that planning isn't truly a separately identifiable function: it is necessarily an endemic function covering a wide variety of disciplines. Secondly, I think that planning suffers through too great a fixation with the role of planners as creative catalysts. Certainly, I think that an agency team planning an account has to number creative catalysts amongst its members (including the creative members). But it should never do this to the detriment of

incorporating fundamental strategists (which is where planning starts, in my view). And these may or may not be the same individual.

This brings me on to the area of who should do planning. To which my answer is everyone who is able to think constructively about advertising: because, the wider-based the thinking is, the better it is likely to be. This is not to deny the role of people who would traditionally be labelled researchers: as I have said, I see a distinct role for them in being a provocateur in terms of strategy development, a partner in terms of creative development and a pragmatist in terms of visionary thinking.

But it would be a fool who felt he had a monopoly of thinking ability. So, whereas I welcome the development of thinking in advertising, I counsel 'beware of soi-disants planners bearing gifts'.