

Part I

Planning: Role and Structure

The articles in this section give a very vivid flavour of the London advertising world in the 1970s. It is the definitive account of where the new discipline of account planning came from and what it aimed to do at a time when all advertising agencies were modelled on the typical structure of American agencies. The multinational agencies were relatively large and coherent entities in the sense that all the disciplines lived under the same roof.

The value of this historical perspective to readers in the fragmented world of communications planning today is enormous. Why? Because the job to be done is exactly the same in our more complex world as it was in what seems a much more orderly past.

The bitty, fractious media and agency environment together with the distractions of technology and social change often obscure this fact. Yet the intellectual logic that binds the whole process together is the same now as it was then and the themes in this section have important lessons for today.

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Who Do You Think You Are?

By Malcolm White, Planning Partner, krow

An introduction to:

- 1.1 The Anatomy of Account Planning***
- 1.2 The Origins of Account Planning***
- 1.3 How I Started Account Planning in Agencies***

Of the articles presented in this wonderful book, 91% were written by Stephen King. The remaining 9% (or two articles) were written by the late John Treasure, formerly of JWT, and the late Stanley Pollitt, formerly of Boase Massimi Pollitt. Both these articles are collected here along with Stephen King's account of the birth of account planning.

These three articles are quite different from the others in this collection. They are not directly concerned with marketing, brands or budget setting, nor with technical subjects like pre-testing. Nor are they theoretical or obviously polemical.

Instead, all the articles are concerned with events that happened almost 40 years ago. They are the story of something extraordinary that happened when three people who are sadly no longer with us, and a host of other individuals who are much less well known than these three authors, started thinking along similar lines. The extraordinary something was the development and introduction of account planning in agencies.

The story each article tells from slightly different perspectives is played out in a world that seems very different from our own: it is a world that is sketched out in the articles. Advertising agencies have marketing departments that plan new product development, that analyse the sales data for clients and present the results to them at their board meetings. Account men are called "representatives" (or at least they were at JWT), and we come across a roll-call of agencies that no longer exist or have probably been swallowed up by one mega-merger after another: Pritchard Wood and Partners, DPBS, OBM and Beagle, Bargle, D'Annunzio, Twigg and Privet (the last of these is a favourite Stephen King joke: a spoof on the raft of small agencies that began springing up in the 1980s characterized by the name of virtually every employee on the door).

In short, these articles are firmly rooted in the past. They are history. Why then should the modern young planner in these time-pressed times give these articles the 30 minutes required to read them? The simple answer is that they will tell the modern young planner in these time-pressed times who they are, and what they should be.

Reading each of these articles is like coming across a box of old family photographs hidden in a dusty attic. And I don't just mean that these articles, like the old photographs, aren't looked at very often. The background and settings in the articles are certainly different from today, like the background and settings of years gone by in old family photographs. Many of

the people mentioned in these articles aren't well known today; they are the equivalent of a shadowy figure in the back row of a formal family portrait.

But despite the obvious, superficial, differences between past and present there is a deep echo from the past in these articles that is slightly surprising but helps to explain why we are the way that we are, and even helps to explain the interests and preoccupations we have. A bit like spotting a family resemblance between yourself and a great, great aunt.

Have Planners Lost Touch with their Roots?

Planning has certainly changed and developed from the planning defined and practised by Stephen King, John Treasure and Stanley Pollitt. A certain amount of change is inevitable, but I think in the process many planners have drifted away from, and lost touch with, their roots, not always to the benefit of themselves, their agencies or their clients. I even suspect, from the conversations that I have, that today's planners under the age of 30 have little awareness of where they (and their job title) come from.

Reading these papers is at very least a comforting reconnection with the past and a return to roots. But there is something rather unsettling about these articles. They make me think that some of us are denying our roots, like someone from a working-class background in the North East who has succeeded in London and is slightly ashamed of his or her humble background. I think this because there are three clear lessons to be drawn from these three articles. They may surprise at least a few of the younger planning community.

1. Planning Was Never Intended to be Just about Imaginative Leaps or Just about Lateral Thinking

When attention has been paid to the story of the birth of planning over the last 40 years, too much of that attention has been focused on the differences in approach between the two agencies that could claim to have invented it. Reading the story of the development of planning at JWT (as told by Stephen King and John Treasure) and at BMP (as told by Stanley Pollitt), I was not only struck by the broad similarities but by the emphasis that both agencies put on thorough and rigorous planning, grounded in facts and realities.

JWT's approach was grounded in client marketing realities and its Planning Department sprang from their Marketing Department. BMP's approach was anchored by the reality of the consumer:

All creative work – and we mean all creative work – at BMP is checked out qualitatively with a tightly defined target market. . . To give some idea of scale we conducted some 1,200 groups last year which arguably makes us the largest qualitative research company in the country. (Pollitt)

This all feels quite different from current practice. So much of what I see in the planning of today (including in our own APG Planning Awards) is more about interesting ideas than it is about the right idea (or even *a* right idea). These three articles remind us that great planning isn't creativity; it is grounded creativity. Great planners are those who can flip between logical analysis and lateral flights of fancy, or as Jeremy Bullmore put it: "We need to be intuitive, instinctive, scared and lucky AND we need to be rigorous, disciplined, logical and deductive" (Bullmore, 1991).

I think we need more of these sorts of people and less of those who are just "interesting". For the planning species to thrive and prosper, it has to reject the specious.

2. Planning today is too concerned with downstream creative interventions at the expense of big, strategic thinking which happens upstream

Stephen King refers to his famous typology of planners in *The Anatomy of Account Planning*:

I believe in fact that the most fundamental scale on which to judge account planners is one that runs from Grand Strategists to Advert Tweakers. And that nowadays there are rather too many agencies whose planners' skills are much too near the the advert-tweaking end of the scale.

Paul Feldwick (2007) has observed that "it would be fair to see JWT as closer to the former and BMP (at least by the 1980s) to the latter, though the choice is clearly somewhat loaded!" What Stephen King meant by "grand" at the extreme is clear from a later paper where he describes grand strategists as people who are "intellectual, aim to see the big picture, are a little bit above the fray, almost economists" (King, 1988). From my personal perspective, being "grand" by that definition is every bit as bad as being a tweaker. Also, more importantly, as marketing departments and consultants grew in number and in confidence, they tended to play this role.

Nevertheless, it seems to me that both agencies and planners have increasingly retrenched to the ad-tweaking end of the scale, even if few would call it that, and Stephen's criticisms are even truer today.

Because of all this, I think we need to reassert the role of the planner in developing big, strategic upstream thoughts. Thoughts like "Dirt is good" for Persil and Dove's "Campaign For Real Beauty", for example, are big upstream thoughts. They neither belong to the camp of the Grand Strategist, nor to the party of the Ad Tweakers.

They are much more like the idea of the "strategic concept" that John Treasure defines in his article:

Such strategic thinking and planning is especially valuable for the advertiser who is financially unable to match forces (or dollars) with a strongly established competitor. And it will be seen here that CREATIVE thinking may be even more valuable than in the area of messages, where most of the talk about "creativity" in advertising is focused.

To encourage us all to strive more often for these big upstream strategic concepts, we at The Account Planning Group will be unveiling a small, but important change to our biennial awards: from 2007 they will be called The APG Creative *Strategy Awards* (rather than Creative Planning Awards as they are today).

3. Planning was, and is, a force for changing advertising and communications, and the way agencies think and behave

Stephen King linked the futures of account planning and advertising in his article, and of course the stories that the three authors tell in their three articles is about the impact of planning on two agencies and on the world of advertising generally. Stanley Pollitt emphasizes that planning requires a particular agency environment in which to flourish, and he points out that the basic ground rules of advertising and how it is developed were also changed by planning.

In recent years there has been too much debate on the role and skills of account planners, and far too much emphasis on the planner as an inspired individual. This runs the risk of separating the planner from the process, the agencies and the clients.

To celebrate this broader role of planning we are creating a new award for our 2007 APG Strategy Awards. This award will be called The Stephen King Strategy Agency of the Year

Award, and will award not an individual but the collective efforts of the planners in the agency that has done best in the awards.

But What a Brilliant Idea Account Planning was

Reading these articles brings home a point that I think has too often been obscured by the shadows of history, by our contemporary obsession with the future, and by always moving forward. The three articles illuminate, with the flash of a firework exploding in the pitch black sky, what a brilliant idea account planning was. It was as big an idea in the narrow context of 1960s advertising as Darwin's idea of evolution was for the Victorian world.

To steal the words of the American philosopher David Dennett – meant for Darwin and his theory of evolution, I believe, and reading these three articles reminds me of this belief – account planning is “*the single best idea anyone has ever had*” (quoted in Dupre, 2003).

Let's not forget that.

And Finally . . . the Challenge to Planners in 2007

Forty years on from the invention of account planning in agencies, most of us are quite familiar with planning. Reading these articles makes this familiar thing – planning – strange and wonderful again.

They challenge all planners to take a long, hard look at themselves and what they do, and ask some searching questions:

- How does what you do as a planner, measure up to the vision of Stephen King and Stanley Pollitt?
- Ask yourself when was the last time you were rigorous, deductive and logical rather than just intuitive and lateral?
- When was the last time your interesting ideas were really grounded in facts, realities and data?
- When was the last time you came up with a big strategic concept for a brand?

The correct answer to the last three, by the way, is: “Just last week, thank you very much”.

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The Anatomy of Account Planning*

By Stephen King

Tracking account planning is rather like counting a mixed batch of tropical fish. You think you see patterns, but they've all changed by the time you've finished counting.

There's little enough doubt about its growth. Today most of the top UK agencies have planning departments and most of the recent new UK agency Weves have them built into the letter heading (at least one of Beagle, Bargle, D'Annunzio, Twigg and Privet will be a planner).

Yet the current approach of agencies varies between the integral and the non-existent. It's impossible to imagine Boase Massimi Pollitt without account planners. At the same time it's been recently announced, in suitably crude language and to no one's great surprise, that there's no room at all for account planning at McCann's.

I don't think one should just throw up the hands at all this diversity. It seems to me that the future of account planning, and maybe indeed of advertising agencies themselves, depends on our teasing out correctly the historical strands – three in particular.

HOW ACCOUNT PLANNING STARTED

The first strand is how it all started. Advertising has always been planned and campaigns have always been post-rationalized. People like James Webb Young, Claude Hopkins, Rosser Reeves, David Ogilvy and Bill Bernbach were all superb planners. What is relatively new is the existence in an agency of a *separate department* whose prime responsibility is planning advertising strategy and evaluating campaigns against it. Such departments are older than we sometimes think. To quote from a 1938 JWT London brochure: "*Bright ideas must survive sharpshooters in the marketing department and snipers on the Plan Board, before they stand a chance of being seen by the client.*" Despite the rather negative role of sharpshooting, it seems that there was a department that aimed to apply marketing thinking to advertising ideas. (This was not a research department. BMRB had been set up as a separate research company five years before.)

When I joined JWT's marketing department in 1957, there were about 25 people in it allocated to accounts – as described in some detail by John Treasure (1985). What we did for each of our clients included analysing marketing data and published statistics, writing marketing plans, recommending more research, and planning new product/brand development. Our marketing plans were a bit naive – strong on the broad view, but a touch vague on logistics and usually in the dark about profits; but somebody had to write them. Not surprisingly, they went into most detail on advertising strategy and expenditure. They were of course the basis for the agency's creative work.

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Then clients gradually started to build up proper marketing departments, who wrote their own plans. We tried to influence the strategic part of these plans by getting in first with our own blue book recommendations (with some relief abandoning any pretence of knowing much about distribution, journey cycles and case rates). Increasingly we concentrated more directly on our own expertise, the advertising strategy. We also set up four very small specialist groups – an advertising research unit and a media research unit in 1964, a new product development unit and an operations research unit in 1965.

In a sense therefore, when JWT disbanded the marketing department and set up its account planning department on 1 November 1968, it was more a reorganization and renaming than a radical change. Perhaps the biggest change came from recognizing that many of the senior media planners were analysing exactly the same data in exactly the same way as the people in the marketing department, as a basis for making the main inter-media recommendations (Jones, 1968; King, 1969).

The first written proposals to the management for the new department came on 8 April, the final blueprint on 23 August. It was all worked out in a series of meetings and away-days of the new group heads. At one of these (on 15 July) we finally settled the name: we'd tried target planner (too narrow and obscure), campaign planner (too competitive with what creative people did) and brand planner (too much restricted in people's minds to packaged groceries). Tony Stead suggested account planner and it stuck. Meanwhile a very similar gradualist development was happening at what turned into BMP. There was one important difference: the basis there was research rather than marketing. By 1964 at Pritchard Wood there was a media research unit, a marketing research unit (mainly doing desk research), a qualitative research unit and a research department (mainly commissioning quantitative research). Some 25 people in all, but not allocated to accounts, and too fragmented to have a very powerful voice in the agency. When Stanley Pollitt took over the research and media functions, he made the crucial change of putting "*a trained researcher alongside the account man on every account*". He quickly found that a great many trained researchers were more concerned with technique than with the green-fingered interpretation and use of research; and so moved on to finding and developing specialist advertising planners, with Peter Jones as the first.

When BMP was formed in June 1968 account planning was built in from the start, and Stanley Pollitt became the first head of it in an agency (though the name was in fact later borrowed from JWT). The basis was the Cadbury Schweppes account group, whose members carried on their existing working practices.

While the start of it all at BMP was thus equally gradualist, there were some differences from JWT's approach. The ratio of planners to account managers was much higher – it has varied from one-to-one to one-to-two, whereas JWT has always had about one-to-four. Partly because of this and partly maybe because of their origins in research, BMP's planners have been far more *directly* involved in qualitative research. As David Cowan put it in 1981: "*A central part of the planner's job is to conduct the qualitative pre-testing research.*" JWT's view was always that the gains this brought in involvement and direct contact with consumers would be more than offset by the loss in objectivity and that it was better to use specialist qualitative researchers.

Whatever the differences between the two pioneer agencies, the similarities were very much greater. Both recognized that the key innovation was the development of professional planning skills and of their integration into the process of producing advertising. It was a fundamental

change in the internal balance of power and influence. As I wrote in 1969:

What we have set up is a system whereby a project group of three skills (account management, creative and account planning) is the norm for the planning of advertising campaigns.

Or as BMP put it in their offer document of 1983:

The main new element introduced into its structure by BMP was called the account planner. The planner brings not simply research, but also the use of data, into every stage of advertising development as a third partner for the account handler and creative team.

The rush by other agencies to follow this lead was muted. For several years nothing at all seemed to happen. By 1979 only six other agencies in the top 20 had planning departments (CDP, DDB, Dorlands, DPBS, FCB and OBM) and maybe a dozen of the smaller agencies. After 1979, maybe spurred on by the formation of new agencies and of the Account Planning Group, it all accelerated rapidly.

The speed of recent growth has had one unfortunate result, in my view. Many managements have copied the most overt element of BMP's account planning, without fully understanding the depth of skill and breadth of interest involved, the very high ratio of planners to account managers and the great commitment to training. All they have seen, in fact, is account planners running group discussions. As a result a large number of qualitative researchers have found themselves, after four years or so of slogging away at group discussions, translated overnight into instant agency Account Planning Directors. It was so much easier to find them than people with a thorough grounding in all aspects of brand building.

I believe in fact that the most fundamental scale on which to judge account planners is one that runs from Grand Strategists to Advert Tweakers. And that nowadays there are rather too many agencies whose planners' skills and experience are much too near the advert-tweaking end of the scale.

VIEWS ON "HOW ADVERTISING WORKS"

A second strand that affects differences in account planning is that of the brand personalities of the agencies themselves. This issue was richly and convincingly discussed by Charles Channon (1981) in "Agency thinking and agencies as brands."

His key thesis was that differences in agencies and their output "in the end reflect different ways of thinking about how ads work and consequently different approaches to planning ads which do so". He picked out "argument" as the essence of Masius' thinking, "imagery" for JWT, "rhetoric" for BMP, "aesthetic" for CDP.

It's certainly true that the development of account planning and of ideas about how advertising works have supported each other. For JWT, 1964 was a critical year. Its new advertising research unit, faced by off-the-peg quantitative ad-testing methods imported from the US, had got stuck. We felt that the only sensible approach was to measure whether ads achieved their specific objectives, but creative strategy was being set as a "consumer proposition". What on earth could be meant by "achieving a consumer proposition"?

This puzzle led eventually to a new approach to planning advertising, called the T-Plan. It was based not on what ought to *go into* the advertising, but on what ought to be the consumer's *responses* to the brand as a result. Other ideas about how advertising works – like reinforcement rather than conversion (King, 1967), brand personality, the direct/indirect scale of responses

(King, 1975) and the consumer's buying system – have all moulded the precise way in which account planning has developed at JWT.

One valuable addition to account planners' views on how advertising works was described most clearly by Rod Meadows in "They consume advertising too" (Meadows, 1983). He argued that people actively consume advertising in its own right; they're experts in what it's trying to do; they judge brands as much on the quality of their advertising as its content. These "advertising literate" people expect advertising to be original enough to get their attention, in a form that stimulates them, entertains them and recognizes their interest. Such views among planners have done much to support the distinctive form of UK advertising.

THE AGENCY ENVIRONMENT

The third formative strand has been that of external changes. Almost all business has become more competitive over the 25 years and has had to respond more rapidly to events. For instance, the pressures on package goods marketers from retailers and the "crisis in branding" in the mid-1970s led to a noticeable shortening of vision; it's hard to devote a lot of attention to strategic planning if Sainsbury's is threatening to delist you tomorrow.

The agency world has changed a lot too. Agencies used to be professional partnerships, often somewhat dozily managed. Quite suddenly, led by Saatchi and Saatchi, they become businesses in their own right, often facing all the financial pressures put on a public company. The trade tabloids started getting their stories and comments from financial analysts, rather than from people with a direct understanding of the business. Some managers of agencies inevitably become a little affected by some of the traditional "City values" (such as short-termism, greed, self-absorption and hysteria). They stopped worrying about the clients and the layouts and started worrying about convertible deleveraging ratios and fully diluted negative net worth.

There are other ways in which agencies may have been becoming more inward-looking. The recognition of consumers' advertising literacy has been wholly good for UK advertising, with its stress on the need for original ideas and vivid expressions of them. But it's not too difficult to slide from that to believing that the creative people in an agency and the creative work are the *only* elements that matter; that creative people alone are fit to judge the merit of campaigns; that the account manager's job is simply to sell the resulting great work to the unsophisticated client. While the extremes of such views are no doubt rare, I think there have been subtle changes in the balance of power and influence within some agencies; and certainly in the way that the trade press has presented them.

Any trends towards short-termism and self-absorption are bound, I think, somewhat to diminish the role of account planners. Their skills lie in the outside world and the longer term, trying to match clients' abilities and brand personalities with consumers' aspirations. On the whole, the agency environment has tended over time to push planners towards the advert-tweaking end of the scale.

SO WHERE WILL IT ALL GO NEXT, THEN?

It seems to me that the future of account planning will continue to depend on the same three strands and in particular on the role that advertising agencies decide to play in future.

Marketing companies today are increasingly changing their view-points. They recognize that rapid response in the marketplace needs to be matched with a clear strategic vision. The need for well-planned brand building is very pressing.

At the same time they see changes in ways of communicating with their more diverse audiences. They're increasingly experimenting with non-advertising methods. Some are uneasily aware that these different methods are being managed by different people in the organization to different principles; they may well be presenting conflicting impressions of the company and its brands. It all needs to be pulled together.

I think that an increasing number of them would like some outside help in tackling these problems, and some have already demonstrated that they're prepared to pay respectable sums for it. The job seems ideally suited to the strategic end of the best account-planning skills. The question is whether these clients will want to get such help from an advertising agency.

If agencies move further towards an inward-looking obsession with their profits or their creative awards and a narrow-minded view of advertising as a *competitor* to other communication media, I'm not sure that they will. The work will go, as it is already starting to go, to a wide variety of specialists, management and marketing consultants, public relations advisers, corporate identity designers, and so on.

However, advertising agencies do have a few powerful advantages in this area. Most outside observers believe that the quality of account-planning and brand-building skills and people is higher in agencies than elsewhere. They have made more progress on how communications work (though on a rather narrow front). They have pioneered the use of some valuable technical tools, such as market modelling. They have the immense advantage of continuous relationships with clients. If the will is there, it could be done.

What agencies, and the account planners in them, would have to do is above all, *demonstrate* that they have the breadth of vision and objectivity to do the job; apply "how marketing communications work" thinking and R&D to a much wider area; probably bring in more outside talent, from marketing companies or other fields of communication; make more efforts to "go to the top" in client contact (the one great advantage of the various specialists); and make sure that they get paid handsomely for the work. I very much hope that this can happen – I wouldn't like to think of the best strategic planners leaving for the other sorts of company or of agency planners shifting wholly to advert-tweaking.

I trust too that *Admap* will continue to plot how all this goes in the future as it has for the last 25 years. Its contribution has been enormous; most of the new ideas about advertising and how it works have emerged and been argued on its pages. It uniquely bridges the gap between "*D'Annunzio set to quit in Twigg, Privet image turmoil*" and "*Conjoint analysis of extrinsic benefit appeals: a magnitude estimation approach*". Account planners have been constantly stimulated, infuriated and enlightened by *Admap*. They know that its particular flavour has been largely the work of two people. I know that the innate modesty of the publisher and consultant editor will not allow them to be named, but from all account planners I'd just like to say thank you.

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The Origins of Account Planning*

By John Treasure

Planning Before 1968

In June 1960, at the request of the then managing director of JWT (Tom Sutton), I transferred from BMRB, where I had been managing director for the previous three-and-a-half years, to join the Board of J. Walter Thompson with the title of director of research and marketing.

In June 1960 the marketing department was organized in four groups under the leadership of four very experienced people. There were 22 executives in these four groups which meant that the department employed in total 27 executives. There were, in addition, a large number of secretaries, a charting department and sundry trainees, making in all a department of some 60 people. (The ravages of inflation are obvious from the fact that the annual salary bill for the 22 executives (i.e. excluding the group heads and myself) amounted to £26,450. The highest salary was £1,650 and the lowest £650.)

In the next few years (under my inspiring leadership!), the marketing department increased considerably in size. In November 1962 there were 42 executives in the department and the salary bill had risen to £69,150.

What did all these people do with their time? I can certainly remember that they were all very busy but it is difficult even for me now to understand (given the size of JWT at that time) why we needed so many people. I suppose one explanation must be that many clients relied on us to do the analysis of their market data for them.

Another reason why they were all so busy was that account executives (or “representatives” in Thompson language) at that time used the marketing executives working on their accounts to do all their donkey work for them. There was undoubtedly, also, a tendency for meetings with clients or suppliers to be attended by quite a lot of people, with the result that a good deal of executive time got used up with perhaps no great benefit to the agency.

However, there is equally no doubt that one of the more important jobs done by these marketing executives was planning. The creation of an advertising plan for the brand, which defined objectives and strategies and suggested ways of measuring effectiveness, was clearly understood to be the job of the senior marketing executive, who was a full member of the account group. It was not always done well but then it is not always done well today!

During this period, I can remember feeling very irritated that we did not have a system of analysing markets which defined target groups correctly. A system was developed in due course in 1964 and became known as the T-Plan. (Incidentally, the T in T-Plan does not stand for the Thompson Plan or the Treasure Plan but for the Target Plan.)

The very name T-Plan with the implication that planning is an agency responsibility shows that by the early 1960s the importance of planning as an integrative process was clearly

*This is an edited version of the article published in *Admap*, March 1985.

and explicitly accepted. I cannot do better than to quote a passage from the introduction from the T-Plan (as written by Stephen King in 1964) which makes the point very clearly indeed:

I think the main requirement for a new system of setting creative strategy is that it should be more in terms of the consumer. Our objective must be a certain state of mind in the potential buyer, not a certain type of advertisement. . . . It must be essentially a consumer system because advertisements are means, not ends. Until we know more about how they work and what sort work best, strategy should be about ends.

We can only get a comprehensive system of objectives in terms of the consumer's mind. It is the one thing in common to product design, marketing strategy, creative strategy, media strategy, testing effectiveness. Most advertising aims to intensify or lessen people's existing predispositions. It is not trying to drive something new into their brains.

Modern psychological theory shows that what is put into an advertisement can be very different from what is got out of it. It is the response that concerns us.

Setting creative strategy in consumer terms can eliminate ambiguous advertising jargon (brand image, copy platform, etc.). This sort of system is far less constricting to creative people.

I hope I have said enough about planning at JWT in the 1960s to demonstrate (a) that planning was firmly accepted at that time as the specific responsibility of the marketing executive and (b) that planning had reached a respectable level of sophistication, proof of which is the creation of the T-Plan in 1964.

This means, among other things, that the late Stanley Pollitt was writing without a full knowledge of the facts when he published his article in 1979 entitled "How I started Account Planning in Agencies". In this article, Pollitt said that a paradox developed in the 1960s – as more and more data relevant to sharper advertising planning was becoming available more and more of the agency researchers, who were competent to deal with the information, were leaving the agencies to join research companies. He went on to say:

At this point in 1965, I found myself suddenly acquiring responsibility for research and media at the then Pritchard Wood and Partners: I had a free hand to try to resolve the paradox and this was how the idea of planning and planners emerged.

First, he says, he tried to convert his agency researchers into planners but this proved to be disappointing – they had grown cosy in their back rooms. So they decided to breed planners themselves from numerate, but broad-minded, graduates.

Clearly, Stanley Pollitt was developing his ideas along very similar lines to Stephen King and others in JWT at that time. However, if only for the record, it is a fact that the use of numerate and broad-minded graduates in a planning function was well established in JWT in the form of the marketing department long before 1965. It is true that it was not until some years later, in fact in 1968, that the term "account planning" was invented to describe this particular job function but Pollitt, of course, acknowledged in his article that he borrowed the term "account planning" from JWT.

The Birth of Account Planning

I was recently given a print-out of the membership of the Account Planning Group. I went through this list and, according to my calculations, there were 262 account planners working in agencies. (The last two words are redundant, of course, because account planners can only exist in agencies.) However, given that there may be agencies with account planners who do not belong to the APG, that some of the people listed in the print-out may not actually be performing the job of account planner, and that I know that APG membership went up quite

a lot after the date of the print-out, it is probably wise to say that there are now around 300 account planners employed by advertising agencies in this country.

This figure came as quite a shock to me. The massive change in the organization of British advertising agencies – and it is still very much a British innovation – has taken place in 16 short years. I can be as positive as this about the period of time because I have been able, with Stephen King’s help, to find documentary evidence of the actual date on which the name “account planning” was, for the first time, agreed and the first account planning department established.

The evidence is a minute of a meeting held at the Londonderry House Hotel on 15 July 1968 (see below). This date, 15 July 1968, can properly be regarded as the birthday of account planning.

Minutes of meeting held at Londonderry House Hotel 15th July, 1968

1. Name: The name Account Planning was agreed as a reasonable description of our functions – and the title Account Planning Group Head was also agreed. In the minutes hereunder the short term A/P will be used.

I can clearly remember the ferment of discussion that took place about this new idea. It was very much Stephen King’s idea, and without his authority and determination nothing would have happened. However, I would like to say that Christopher Higham, who was then JWT’s media director, also played a very important part in the birth of the account planning department in the sense that though its creation was politically damaging to his department, because he lost all his media planners, he was one of the most enthusiastic supporters of the need to make a change. Credit should also be given to Tony Stead for inventing the name “account planning”.

It was, even at this distance in time, a staggering change to make in the organization of the agency. It involved taking a large number of people from the marketing department and the media department and welding them into a new department with novel responsibilities. There were, in the new account planning department, seven groups, each consisting of a group head and two assistants, i.e. 21 planners in all. In addition, we set up an advertising research unit (under Judie Lannon), a media research unit, a new product development unit and a marketing consultancy unit as a separate subsidiary company. The repercussions on people’s careers of making so many sweeping changes on such a large scale were enormous.

I have re-read four documents, all written in 1968, which were concerned with the need to set up an account planning department and to identify the problems which its setting-up would create.

The need to set up a new department to replace the marketing department (and to take over the media planning functions of the media department) was seen at the time to have been created by two factors. These were:

- the increasing marketing skills of clients which made part of the job of the marketing department redundant and
- the increased availability of data and improved methods of planning – e.g. the T-Plan – which made it desirable for someone in the account group to specialize on advertising planning.

Perhaps a series of quotations from the documents will help to communicate the flavour of what was being argued about at that time.

April 1968: The skills of administration and personal relations that most reps have are not really technical enough to count as skills; in any case, they are fine for a going concern but not all that valuable in a crisis or to avoid a crisis. The crucial skill of strategic planning is nearly always missing, largely through lack of practice.

April 1968: The media/marketing planner would essentially be concerned with tactical planning (although in the early stages no doubt reps/backstops will lean on them for longer-term strategic planning). Essentially, the work would involve starting with the raw material of published and private research and ending with a T-Plan creative strategy and a T-Plan media strategy.

May 1968: The general response (to Stephen King's memo about account planning) seemed to be that it made sense, many pointing out that it is not really a very radical change...

May 1968: This change in particular will affect the account planning group – the basic project group of our business. Today it is a group of four people – rep, creative, media and marketing. In future it will be a group of three – rep, creative and target planner. We are sure that this will be a more effective working group...

July 1968: The account planning function.... was advertising rather than marketing strategy.

There are two themes which recur in these documents. One is the concept of the group of three with the account planner as the third man (or third woman) being the essential planning unit of the agency within which the three elements of practicality, imagination and intellect are functionally represented and fused through group interaction.

The other main theme is the importance of strategic planning. I cannot resist the temptation to go back to James Webb Young's little book *How to Become an Advertising Man*, published in 1963, to see what he has to say on the subject of strategic planning.

Finding the one best opportunity in the market for the particular advertiser, and shaping his advertising to exploit that opportunity, is one of the greatest contributions the Advertising Man can make to his client. And his chances of making that contribution, I repeat, will depend upon his penetration into the real facts and nuances of that advertiser's situation.

When the California raisin growers were suffering from a heavy over-production, and a quick expansion in raisin consumption was needed, a strategic concept did the trick. This was to direct the advertising, not towards an "Eat More Raisins" programme, but towards increasing the consumption of the greatest single carrier of raisins, namely raisin bread. This was based on the observation that the consumption of any food is higher where there has been established a fixed time or day for serving it – as with fish on Friday, baked beans in New England on Saturday, hot cross buns at Easter, etc. So a campaign devised in cooperation with bakers to feature "Fresh Raisin Bread on Wednesday" (normally a low day in bread sales) raised consumption of this item 600% in one year; and of raisins used for that purpose proportionately. A strategic concept.

This is of special significance at this time when so much effort is expended by account planners on the use of qualitative research to support, reject or improve the advertisements which the agency has recommended or is in the process of recommending. It would be a pity if all this work became the modern substitute for the labour of marketing executives in the 1960s – the dreary digesting of Nielsen reports, for example – so that the essential and truly valuable contribution which the account planner can make, i.e. strategic thinking – gets elbowed out by the pressure of day-to-day account servicing.

This does not mean that I am opposed to the user of qualitative research in the "pre-testing" (if that is the right word) of advertisements. There is a passage in the T-Plan which says that "we have found small-scale, evaluative research much the most useful method for pre-testing". This view was quite controversial in those days but the passionate advocacy it has received from Stephen King, Jeremy Bullmore, Judie Lannon and many others made it, in the course of time, a quite respectable position to adopt.

It was, therefore, with entire agreement but some mild surprise that I read David Cowan's article "Advertising research – qualitative or quantitative?" (*Admap*, November 1984). I found nothing to disagree with in what Mr Cowan said, but I am surprised that it is still necessary to say these things in 1984. I thought they had all been said and more or less accepted 10 or more years ago. However, since the argument is an important one, perhaps it is desirable that each generation of advertising thinkers should restate the eternal verities.

I should like to make two other points about the development of account planning if only for the sake of historical accuracy.

Don Cowley in his introduction to the IPA booklet on account planning, published in 1981, says that it is interesting to note that the chief focus of interest in the late 1960s, when account planning departments were first being set up, was the way that account planners would help in inter-media decisions. This is quite incorrect, at least as far as JWT was concerned. The primary focus of interest in setting up the account planning department in 1968 was to improve advertising planning, particularly in relation to:

- (a) setting of objectives
- (b) contributing to creative development and
- (c) improving the methods used to evaluate, the effectiveness of advertising campaigns.

John Bartle, in an article in *Admap*, April 1980, said that account planning departments emerged in the 1960s as a reaction to general economic pressures. This was certainly not the case in JWT in 1968. The motivation was quite simply a desire to improve the ability of the agency to keep its clients and to obtain new business. The thought that this was a way to save money was not in our minds at all.

Summary

There are many other issues involved in the development of account planning over the past 25 years that deserve mention. For example, it is strange and sad that account planners, with a few honourable exceptions, have so markedly neglected econometrics as a weapon in their professional armoury. However, the theme of this article has been the origins of account planning. I have no doubt that these origins lie in the ideas and personalities of a number of people who were working in JWT in the early 1960s and, of these, the one person who can rightly be regarded as the founder of account planning is Stephen King.

1.3

How I Started Account Planning in Agencies*

By Stanley Pollitt

“Account planning” and the “account planners” have become part of agency jargon over recent years. I have been able to track down about 10 agencies currently using them. There is even a new pressure group called the Account Planning Group. Unfortunately there is considerable confusion over what the terms mean, making discussion of the subject frustrating. It is worth tracing how the terms came to be introduced in 1965, how planning has evolved and what it means at BMP.

Market research in agencies has changed substantially over the past few years. Planning emerged as a particular way of dealing with this. In the 1950s, advertising agencies were the main pioneers for market research. Except for a few of the very largest advertisers, it was the advertising agency that devised total market research programmes, often from budgets in the advertising appropriation. Main agencies had either large research departments or research subsidiaries like BMRB and Research Services. It was a reflection of the broader consultancy role advertising agencies played. They were partly torchbearers for a new marketing perspective on business.

In the 1960s this changed dramatically and rapidly. More consumer goods companies were restructured along marketing lines. Included within this new “marketing” function was a closer responsibility for market research. Companies set up their own market research departments, devised their own research programmes and commissioned research themselves. They looked to their agencies for more specialist research advice on specifically advertising matters. This again was part of a wider – and I believe, a healthier – trend. Agencies were moving out of general consultancy and concentrating more on the professional development of ads. This meant a substantial reduction in agencies’ revenue from market research – especially from commissioning major surveys. Agencies cut the number of market research people they had. The old research subsidiaries and some new subsidiaries formed out of separate departments became increasingly separated from their agency parents. They had to fight, competitively, for general research work in the open market and worked more for non-agency clients, thus losing any previous connections with and interests in advertising. A small rump of researchers stayed in the agency to cope with the diminishing number of clients still wanting a total research service and provide some advice for other departments. This is still largely the case with most agencies today, and leaves something of a research vacuum there.

At just this time there was a considerable increase in the quality and quantity of data that was relevant to more professionally planned advertising such as company statistics, available

*This is an edited version of an article that originally appeared as Pollitt, S. (1979) “How I started account planning in agencies”, *Campaign*, April. The headline was *Campaign’s*

consumer and retailer panel data, and so on. Also, facilities for analysing data were becoming more sophisticated and more cheaply accessible. This posed a paradox: as more data, relevant to sharper advertising planning was coming in, more and more people qualified to handle it were leaving the agencies.

At this point in 1965 I found myself, essentially an account director, suddenly acquiring responsibility for research and media at the then Pritchard Wood Partners. I had a free hand to try to resolve the paradox. And this was how the idea of “planning” and “planners” emerged. It seemed wrong to me that it should be the account man who decided what data should be applied to ad planning and whether or not research was needed. Partly because account men were rarely competent to do this – but more dangerously, because as my own account man experience had shown – clients on the one hand and creative directors on the other, made one permanently tempted to be expedient. Too much data could be uncomfortable. I decided, therefore, that a trained researcher should be put alongside the account man on every account. He should be there as of right, with equal status as a working partner.

He was charged with ensuring that all the data relevant to key advertising decisions should be properly analysed, complemented with new research and brought to bear on judgements of the creative strategy and how the campaign should be appraised. Obviously all this was decided in close consultation with account man and client.

This new researcher – or account man’s “conscience” – was to be called the “planner”. I felt existing researchers in the agency – the rump – were being misused. They were closeted in their own little backrooms, called on at the account man’s whim, dusted down and asked to express some technical view about an unfamiliar client’s problem.

PWP was not an untypical agency. It had a separate media research unit where researchers were beavering away to determine how many response functions would fit on the head of a pin; a market information unit that sent market analyses through the internal post, which if read were never systematically applied to solving the main advertising problems; a general researcher, who was called in, spasmodically and inevitably superficially, to give instant advice on particular research problems; and finally a creative researcher who would occasionally be called in to conduct creative research to resolve political problems, either within the agency or between agency and client. He would usually be called in too late, when a great deal of money and personal reputations had already been committed to finished films or when the commercials were already on air.

It seemed to me that these researchers should be taken out of their backrooms and converted to being an active part of the group involved with the central issues of advertising strategy. They were to be the new “planners”.

This experiment proved disappointing. I found that the existing agency researchers had grown cosy in their backrooms. They did not want mainstream agency activity. They had grown too familiar with relying on techniques as a crutch, rather than thinking out more direct ways of solving problems. They had grown too accustomed to being academic to know how to be practical and pragmatic. They mostly disappeared into research agencies.

As my first planning manager, I chose Bob Jones who had precisely the pragmatic but thorough base we wanted. We decided the only way to find this new type of researcher was to breed them ourselves from numerate but broad-minded graduates. Peter Jones, first planning director at BMP, and David Cowan, our current director of planning, were the first mutations at PWP. Since then we have “bred” from 22 trainees – 15 are still with us – and adapted five agency or company researchers – three are still with us.

That was the first phase of “planning”. Difficult to define precisely, but it was concerned with making sure that research was a central part of the way all the main decisions were taken. Planners were people who were willing and able to take up this central role. People who were practical, pragmatic, confident and more concerned with solving problems than selling techniques.

When we set up BMP in 1968 we were already able to structure this on the account manager/account planner team basis. (JWT had adopted the planning idea in 1967 and coined the term “account planner”. I borrowed it from them.)

From the outset at BMP we added an important new dimension to the planner’s role which has almost come to be the dominant one. In addition to the development of advertising strategy and campaign appraisal we started to involve planners more closely in the development of creative ideas.

It is impossible for anyone not directly brought up in advertising agencies to understand the immense importance a good agency can attach to getting the advertising content right. It can become a mission and a never-ending struggle for standards of excellence. At BMP the way we have aimed to get it right is through a sensitive balance between the most important ingredient – the intuition of talented creative people – with the experience of good account people and clients and with an early indication of consumer response which the planner is there to extract.

Traditional market researchers are heavy-handed when trying to deal with creative work. The nightmare world of sixties advertising when a number of now discredited mechanistic techniques were being used is a good reminder of this. What we set out to do was to guide account planners to be able to be honest and clear about consumer response without stifling creativity.

All creative work – and we mean *all* creative work – at BMP is checked out qualitatively with a tightly defined target market. Commercials are checked out in rough animatic form, typically with four discussion groups of about eight respondents each. Press advertisements are checked out in individual in-depth interviews with some two respondents. Target market samples are recruited by our own network of 80 recruiters – the majority outside London. Account planners are the moderators of the groups or depths. To give some idea of scale, we conducted some 1200 groups last year, which arguably makes us the largest qualitative research company in the country.

This may not sound particularly unusual. To have some elements of qualitative research on rough and finished creative work is commonplace in most agencies. But I would argue that the scope and thoroughness of account planning at BMP makes it not readily – or maybe sensibly – transplantable to other agencies. It does require a particular agency environment with a number of elements present at the same time.

First, it requires a total agency management commitment to getting the advertising content *right* at all costs. Getting it right being more important than maximizing agency profits, more important than keep clients happy, or building an agency shop window for distinctive-looking advertising. It means a commitment and a belief that you can only make thoroughly professional judgements about advertising content with some early indication of consumer response. I would guess a majority of, not only creative directors, but also account directors, would find this hard to swallow. For planning to work it needs the willing acceptance of its findings by strong creative people.

John Webster and his creative people have grown up with this system. John would say that “planning” is very far from perfect – but like “democracy” it is better than the alternatives. If

advertising is to be rejected or modified it is better that this should be the result of response from the target market than the second-guessing of account men or clients.

Second, it means a commitment by agency management to “planning” absorbing an important part of agency resources. For a “planner” to be properly effective both in marshalling all the data relevant to advertising strategy, and in carrying out the necessary qualitative research, he can only work on some three or four brands.

You need as many “planners” as “account men”. It is interesting to compare some industry figures in this respect – in the top eight agencies billing between £35m and £65m the average number of researchers involved in advertising and creative planning is about eight. In the next 12 – billing between £15m and £30m (excluding BMP) – the average number is four. It involves a financial commitment and the even more difficult commitment to find and train qualified people.

Third, it means changing some of the basic ground rules. Once consumer response becomes the most important element in making final advertising judgements, it makes many of the more conventional means of judgement sound hollow. You cannot combine within the same environment decisions to run advertisements because account directors or creative directors “like” them, or because US management believes that UK consumers respond in some way that the hard research evidence contradicts.

This obviously limits the territory in which the agency can operate. Evidence of consumer response can act as too much of a constraint on some clients and agency people. If it helps to limit the territory for the agency to operate in, it also helps to establish a clear identity and a remarkably consistent sense of purpose within the agency. This second phase of account planning has involved it more directly in the sensitive and rightly carefully guarded area of creative ideas development.

Politically fraught, a minefield though this is, account planners at BMP seem to be coming through it well. “Account planning” described in this way is very much a central part of the agency. As such it is not a simple task to convert to it. Although I am sure we will be hearing the terms “account planning” and “account planners” more widely used, I doubt whether they will carry the significance and meaning that they carry at BMP. “Bolt-on” planning, as *Campaign* rather unkindly referred to one recent change in an agency, is not a really practical exercise.