

What
Every
Account
Executive
Should
Know
About

Account Planning



AMERICAN ASSOCIATION
of ADVERTISING AGENCIES

WHAT PLANNERS DO AND HOW

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INTRODUCTION

The standard definition of an account planner goes something like this—"Account Planners are a new breed of researchers, skilled in personal interviewing and the understanding of social trends, who are charged with being the consumer's representative in the development of advertising campaigns." (*Chicago Tribune*, June 3, 1990.) This is not a bad functional definition since it speaks to three of the main aspects of the account planner's job description:

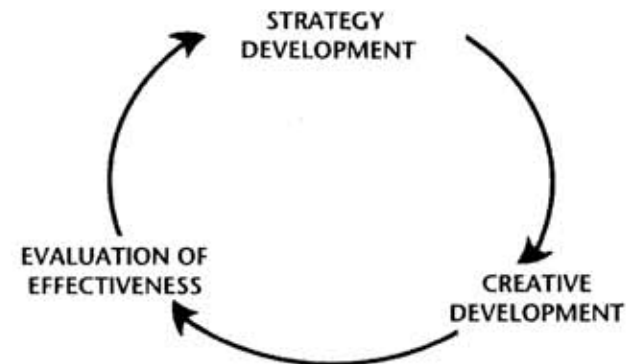
"A new breed of researcher" acknowledges that Account Planners are principally charged with the application of data

rather than its compilation, as was the charter of many agency researchers.

"The consumer's representative" points out that they work alongside account management on every project, approaching it from a customer rather than an exclusively client perspective.

"In the development of advertising" acknowledges that account planners are part of the agency team, whose charter is to develop advertising.

In practical terms, the account planner's major contributions can be correlated to the three key phases of advertising process:



BEYOND PROCESS

The functional definition, however, ignores the spirit behind account planning; i.e., it is part of a belief system about advertising. Key points of its credo might be summarized as follows:

- Good advertising is not formulaic. Templates like "Advertising for Brand X will convince . . . (target audience) that it is better than . . . (competitive set) because it provides . . . (key benefit)" are unlikely to produce innovative or insightful solutions. The planner thinks afresh about how the advertising can work each time.
- Good advertising does not insult anyone's intelligence; not only is this rude, it's bad for business. Planners work on the assumption that consumers are intelligent and are smart about advertising.
- Rather than trying to hype them, good advertising has to involve consumers and invite their participation. The planner has to insure that the work addresses people in a language and style that they can warm to and appreciate.
- Good advertising has integrity. Getting it right takes patience and teamwork. The planner should be "separate but equal" with creative and account management.

DEVELOPING THE STRATEGY

The U.S. Army Field Manual states "every [military] operation should be directed toward a clearly defined, decisive, and attainable objective." Similarly, the account planner must demonstrate a clear understanding as to what the advertising objective should be, and how best to achieve it. Accordingly, he or she needs to consider the consumer implications of each of the following:

- **The Brand.** A brand is a kind of badge; how can advertising be used to give it greater luster? If branding is the attribution of symbolic meaning to a product or service, what equity does it currently have?
- **The Category.** What are the advertising conventions in this category, and how can they be subverted to our advantage?
- **The Market.** What factors are leading the market forward or holding it back, and how can the advertising help exploit or overcome those trends?
- **The Client.** How do the dynamics of the business influence the marketing plan, and how can advertising help the client achieve it?
- **The Competition.** What strategies are the competition following, and how can we outwit them?

- **The Product.** As Bill Bernbach said, "Know your product inside out before you start working. And relate that knowledge to the consumer's needs."
- **Media.** If the medium is the message (many stations and publications have become brands in their own right), what is the most appropriate context for the advertising?

An encapsulation of the strategy will be a creative brief that offers inspiration and guidance for the creative work. This document is frequently used as an agreement between the client and the agency as to what the primary aim of the advertising will be, insuring that all sides share a common set of goals. It should be clear, succinct, and single-minded. It is hard to imagine Henry V rallying the troops before Agincourt to the tune of "highlight younger people without alienating older ones," or Caesar urging his army to cross the Rubicon to the cry of "target the upscale without losing sight of the mass market."

PLAN ON WINNING

Working in association with the client and the agency team, it is the planner's responsibility to insure that strategy and brief are not only insightful and relevant, but also likely to help the client win.

- **Concentrate** your energies and monies against strategic targets. If the competition is bigger than you, is there an Achilles Heel by which you can trip them? If smaller and hence more nimble, is there a tail by which you can tie them down? So they don't get up again, you should . . .
- **Anticipate** a competitive response. A surprising amount of advertising is still wedded to the simplicity of the Unique Selling Proposition—some attribute that the brand has more of than the next guy's. Until they return with something bigger and better. Instead of playing tit-for-tat, consider whether you can lead in such a way, or to such a place, that they will find it hard to follow. To this end seek to . . .
- **Differentiate.** Avoid doing the same thing, on the same ground, as the competition. In far too many product categories, far too much of the advertising is structurally similar. Executions differ, but the messages are variations on a theme. Birds of a feather that stick together, flounder together. To get away from the rest of the flock, aim to . . .
- **Articulate** something interesting. Too many briefs, and hence too many ads, are vapid. Try to find something new to say: make the unfamiliar familiar. Or, if forced to go over old ground, find a new perspective: make the familiar

unfamiliar. Accordingly, don't just imitate . . .

- **Ideate.** It is not enough to eavesdrop on the market. You'll merely unearth a list of generic attributes, as established by the brand-leader. Develop various hypotheses (as to what motivations really underlie the brand or category) and see which stick. That way, rather than just listening to "the voice of the consumer," you actually add something to the conversation.

CREATIVE DEVELOPMENT

The U.S. Army Field Manual asserts that "the side that retains the initiative through offensive action forces the foe to react rather than act." The planner must help insure that the creative strategy is fulfilled, and successfully executed.

The creative development process demands that the planner be a sensitive midwife. Heavy-handed attempts at creative development research (e.g., Attention/Interest/Desire/Action) are not only stifling, they are misguided. Advertising is not a one-way street (aimed at the consumer) but a two-way interaction; a relationship between brand and consumer. The planner must help nurture this relationship.

In practical terms, this may involve any or all of the following:

- Commissioning/doing diagnostic research on initial creative ideas, to understand how they are working.
- Collaborating with the creative team in terms of how any strengths can be capitalized upon or weaknesses remedied, within the body of a creative idea.
- Helping to rationalize the thinking behind the advertising, both in a pitch situation, and in client relationships.
- If there is to be any pre-testing, conducting this in a way that is sensitive to the work and produces meaningful, constructive results rather than a mere hurdle race.
- Tracking the results of the advertising in terms of target effect/behavior, sales, awareness, and image to provide insight for subsequent campaigns.

Traditionally, the relationship between research and creative was strained: placatory at best, antagonistic at worst. By contrast, the account planner seeks to build a more constructive relationship with creative, based on mutual respect and a real understanding of how advertising can work.

EVALUATION OF EFFECTIVENESS

Communications planning is a continuous process. It seeks to

understand as much as possible about how the various elements of the marketing mix are working, from both our own and our competitor's perspectives.

In practical terms this involves:

- Designing and executing specific research programs to monitor such communications processes as brand attributes and reaction to the advertising in line with advertising goals.
- Designing research programs to measure the impact of competitive communications programs.
- Using qualitative research to provide insights into the success or failure of different programs.

WHAT MAKES A GOOD PLANNER?

A good planner must be attentive to detail without losing sight of the big picture. Ideally, he or she should have some of the following skills:

Strategy Development.

Sleuth: Skilled at using marketing and research data and able to translate research results into advertising action.

Inventor: A strategic and visionary mind to create openings.

Therapist: An intuitive curiosity about consumers, and an understanding of human relationships.

Creative Development.

Brief-writer: Being an able and inspiring communicator.

Midwife: Having a sensitivity to the creative process.

Judge: Authoritative in the context of research and advertising judgments.

Agency Process.

Team-player: Continuously involved as an integrated member of the team.

Diplomat: Maintaining a balance between theory and pragmatism as to how ads work.

Witness. Honest about the strengths and weaknesses of the work in the eyes of the consumer.

SUMMARY AND CONCLUSION

Account Planning is not an end in itself. Outstanding ads were and are done without it. But with planning, the chances of getting the advertising right the first time are increased. Furthermore, if the goal is to produce better, more effective advertising, then the combination of imaginative planning and creative excellence is the best means of achieving this.

What is a Planner?

A plan is a scheme of action. And *an account planner is one who plans how to achieve something: better, more effective advertising.* The emphasis is on being prescriptive (i.e., a plan of action) rather than merely descriptive.

Certain agencies have promoted this or that research technique as being the "house specialty." And then touted it as a reason to use that agency. *A planner is a problem solver,* rather than the salesperson for any particular methodology.

What do they do?

If too many adopt the same solutions to the same problems, the results are parity products and me-too advertising. To achieve competitive differentiation, you have to do it differently. With this in mind, *the planner should be a catalyst of brand change.*

The information explosion means that agencies are being buried in data. Field Marshall Montgomery's comment on the need for focus is relevant: "Most [military] problems are in essence simple; but the ability to simplify, and to select from the mass of detail only those things that are important, is not always easy." In selecting what's important, *the planner seeks to inform and assist the creative process.*

Some agencies approach the consumer the way Pavlov approached

his dogs; they throw out a stimulus and await a response. This model of advertising is unduly simplistic; there is no one way in which it works, but several. *It is the planner's job to define the role of advertising* for each of the varying tasks that it is called to perform.

No one likes to be patronized. Yet a surprising number of advertisers still talk down to their consumers, or harangue them, rather than trying to build rapport. *The planner may be seen as a matchmaker* between consumer and brand.

How do they do it?

The planner is responsible for insuring that the focus of the creative brief is the customer. And, chances are, the better the brief the better the work. What's wanted is not a catch-all approach, but a concise description of where the advertising should be going, a short rationale as to "why," and an outline as to "how."

The planner is responsible for helping the advertising strategy, and for acquiring whatever information is necessary to do so. This entails knowing how to conduct his or her own qualitative research, how to design and analyze quantitative research, and then being able to make the leap from data to insight.

Good advertising comes out of teamwork, and *the planner is a central part of the agency team;* i.e.,

he or she must have full access to the client to understand their business objectives. And full access to the creative department in order to turn theory, i.e., the strategy, into practice.

Familiarity breeds contempt.—
"Habitualization devours work, clothes, furniture, one's wife, and the fear of war . . . Art exists that one may recover the sensation of life." (Victor Shklovsky, 1914.) By the same token, advertising can help us to recover the sensation of a brand that may have gotten lost. Accordingly, *the planner seeks to unearth fresh aspects of the brand,* and thereby to build and nurture it.

Of course, planners don't achieve all of the above all of the time. And non-planners achieve some of them some of the time. So it is tempting to see the advent of planning as an evolutionary change—as just more of the same. But it is more radical than that. It represents a serious commitment by certain agencies to place "getting the work right" ahead of "getting the work out." □