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What Account Planning Was Meant To Be

By Eric Blais

Agencies are in a unique position to galvanize insights, strategy and creativity

"The best new-business tool ever invented." Jay Chiat's enthusiasm for account planning 20 years ago has no doubt greatly benefited his agency and an industry in search of a new idea to reshape itself. Unfortunately, all the hype and the way the discipline has often been misunderstood and misused may have prevented it from living up to its promise.

Stanley Pollitt, the man credited with inventing account planning in the U.K. 40 years ago, had a simple objective: Put a trained researcher alongside the account person on every account in the agency. The account planner would be charged with ensuring that all data relevant to key advertising decisions be properly analysed, complemented with new research and brought to bear on judgments of the creative strategy and how the campaign should be appraised.

This kind of planning never really happened in North America. Research departments in agencies were replaced by outsourced research consultants who often became more trusted advisors to clients than their agencies. Very few agencies could afford to assign a planner to every account. Rather than bring insights to creative strategies, planners became responsible for writing them. And in some cases, they became the "go to people" for everything remotely related to strategic thinking leaving account people with project management.

Despite the uneven application of account planning, there is plenty of evidence that it leads to better, more insightful briefs and, consequently, more effective advertising. The Account Planning Group U.K.'s Creative Planning Awards papers clearly demonstrate planning's contribution to the work, how it made a difference and how the outcome would have been less interesting and valuable without planning. Yet in its current form, account planning runs the risk of making account management and creative people strategically lazy. When account planning becomes the thinking department of the agency, account people no longer develop strategies and creative people no longer get deeply involved in the client's business.

What account planning was meant to deliver 40 years ago remains a much needed area of expertise in today's so-called integrated agencies. Account planning and all its variations-strategic planning, creative planning, insight and intelligence, knowledge group and so on-is essentially an attempt by agencies to regain the thought leadership role they once played for clients.

Long before planning moved to America, before branding became hot and integration a necessity, agency types provided thought leadership. Advertising legend Mary Wells and her partners were doing just that for Braniff Airlines in 1965 when they promised the "End of the plain plane." It wasn't called experience branding but it was about transforming travellers' experiences at every brand touch point to deliver the promise. There were no planners. Only a bunch of passionate creative and account people roaming through grey airports to gain insights. We give this a fancy name today: In situ observational research. There was no talk of whole eggs, 360° communications or holistic marketing. But integration happened because account and creative people were passionate about a brand idea. They reflected it in everything from the colour of the planes and the terminal waiting areas to the uniforms of the hostesses. There were no consultants specializing in workplace learning to align people with strategy. Employees simply knew how to live the brand and became brand ambassadors. There was no need to sell lower level decision makers first. Wells dealt with the CEO. So well, in fact, that she married him.

Imagine undertaking the same makeover of an airline today. Bain & Company would be retained for its expertise in the airline sector having assisted 28 clients around the world on their most pressing management issues, including fleet management, capacity planning, routing and scheduling, growth strategies and purchasing. Lippincott Mercer would be advising Braniff on corporate identity issues. The Boston Consulting Group would be telling Braniff how the Internet provides a new set of enhanced tools to enable it to develop special relationships with customers. Monitor Group would be using its proprietary Customer Portrait methodology to transform mere data into the stories customers tell themselves when they buy and use products. Just to be sure, McKinsey would be working on a global segmentation of airline passengers and looking for hidden value in the operation the way an industrial engineer would in a factory.

Eventually, the procurement folks would be asked to assist with the search for an advertising agency. There would be little need for strategy and a pressing need to get ads and mailers out on time and on budget. Welcome to the commoditization of our business.

Consultants have filled a void in the marketing area and have an open invitation to the C-suite (shorthand for CEO, CMO, CIO, etc.) in many organizations. Yet agencies-or whatever we should call ourselves-are in a unique position to do what Mary Wells did so well: Help clients succeed by being at the intersection of insights, business strategy and creativity. Only agencies operating at this intersection can imagine and nurture the kind of galvanizing ideas that build brands and businesses.

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