



WARC

The future of strategy



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More from WARC

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Themes from this report

1

Strategy's influence has been growing

Most survey respondents said the influence of the agency planner is increasing, rather than decreasing – though this increase is generally felt more within the agency than it is among clients. A major driver of this growing influence is the increasing complexity of the marketing landscape. Faced with an ever-increasing number of channels and touchpoints, the agency strategist is well placed to act as a “marketing sherpa” for others.

2

Fragmentation is a major challenge for the future

In this more complex landscape, strategy teams are increasingly made up of specialists rather than generalists: digital, social, CRM and shopper strategists are on the rise. As a result of this trend, there is a sense that the traditional ‘brand planner’ – and ‘big picture’ strategy – is becoming irrelevant. Some mourn the loss of a holistic view. And others are trying to reverse the trend, as they re-integrate their strategy teams by encouraging the specialists to learn traditional planning skills.

3

‘Upstream’ opportunities; ‘downstream’ pressure

The clear opportunity for strategists, according to the survey, is in moving ‘upstream’: helping clients solve business problems rather than only focusing on ads. This increasingly means data interpretation and analysis, which brings agencies into competition with management consultancies. But there is a tension between strategists’ desire to move upstream, and the growing pressure from clients for them to be involved ‘downstream’ in tactical, short-term project work.

4

The job may be changing, but the planner’s skillset isn’t

Strategy teams are likely to be hiring and growing. The skills that respondents say they are looking for are not new – they want intellectually curious people able to distil complex thoughts into human insights. But planning teams are expected to work in new ways: briefs need to be turned round more quickly than ever before, and collaboration with other teams within the agency, particularly creative teams, is becoming more important than ever.

Executive Summary

How is the role of the agency strategist evolving? WARC's Future of Strategy report, based on a global survey of senior strategists, uncovers a discipline that is gaining influence, with marketers increasingly in need of sound advice in a fast-changing communications industry. But strategists face many future obstacles, including the fragmentation of skillsets, tightening budgets and a growing threat from consultancies.

Several big themes emerged in the research that underpins WARC's Future of Strategy report. According to our global survey of senior planners and strategists (the two terms are used interchangeably in this report), there is general optimism about their standing in the industry, with 61% saying they are gaining influence within their agencies. Almost half (46%) believe they are gaining influence among clients. One of the main drivers of this trend is the growing complexity of the media and marketing landscape: according to our interviewees, there is a rising need for strategic guidance on how modern marketing works, which makes the agency planner more influential. But, beneath the surface, it's clear that a lot is changing.

The fragmentation of strategy – into communications planning, social strategy, mobile strategy, and so on – was a big theme in the survey. Managing this fragmentation – assigning the right people to a brief – is now a key challenge for

senior planners. There is some disagreement over whether fragmentation is a good or bad thing: some respondents, for example, ask who will develop big-picture ideas if the traditional brand planner is, in the words of one survey participant, "toast"? [According to Gareth Kay](#), co-founder of Chapter SF and one of several contributors to this report, strategists are running the risk of "specialising ... into irrelevance".

The survey questions on strategists' biggest future opportunities and challenges reveal another tension. When asked for [their biggest future opportunities](#), the most frequent answer (cited by 72%) was the opportunity to move 'upstream': in other words, to work on clients' business problems, not only on their ad campaigns.

Planners may wish to head upstream, but the reality is that many are being pulled back 'downstream': given more and more short-term, campaign-based project work by cost-conscious clients. Overall, such client pressures were [the most commonly cited obstacle](#) to future

Executive Summary (continued)

“Strategists need to adapt to a new, data-driven, competitive reality – while still recognising tried-and-true planner values.”

growth in the survey, mentioned by 67% of respondents.

Data was another big theme, particularly on the media side: strategists are increasingly being asked to make sense of all the different data sources clients now have at their disposal. As they do so, they are increasingly coming into competition with consultancies like Deloitte Digital and Accenture, which are themselves moving into offering marketing services.

The move by consultancies into territory traditionally held by ad agencies clearly has some senior strategists nervous. But others believe the core ‘human insights’ offered by planners is something the consultancies will struggle to match.

Either way, there is a greater need for strategists to make a better case for the value they add. As Guy Murphy, Worldwide Planning Director at J. Walter Thompson, [comments](#): “It’s ironic that planning, the most effectiveness-minded discipline, pays little attention to whether it creates a commercial return.”

A majority (53%) of respondents to

the survey in creative agencies said that the headcount in their strategy team [had increased over the recent past](#). The core planner skillset hasn’t changed: senior strategists say they are looking for curious minds able to distil complex problems into simple ideas. But the pace at which they are expected to work is increasing, and there is a shared sense that the planning team of the future must be diverse in backgrounds and previous work experience.

Once the strategy team is built, respondents pointed to many important characteristics of a great “planning culture” in the agency: from having the right tools available, to showing strong leadership, even to getting the seating plan right.

While the agency’s seating plan may on the face of it be a minor concern, the fact it is a point of discussion reflects a deeper reality. At a time when clients are asking agencies to do more with less, the need for collaboration – among planners, between planners and creatives, and between different agencies – has never been greater.

A note on the methodology

The Future of Strategy report is based on a survey conducted via phone and face-to-face interviews with 75 senior agency-side planners and strategists, or executives with a planning background. Participants were evenly regionally split (EMEA, Asia-Pacific and the Americas). Results from the survey’s multiple-choice questions were collected from an online form, sent to each participant after their interview.

Definitions of the strategic function within agencies remain ambiguous. Therefore the terms “strategist” and “planner” have been used interchangeably, both in the research sessions and in the report.

All respondents participated in the survey on the basis that their contributions are anonymous, and that they were not to be identified in the report. Some details cited in the report (job titles and cities) have been changed to ensure this anonymity. Later – and separately – 12 survey participants (see p. 6) contributed commentaries on certain findings from the report.

Expert commentaries in this report



Murray Streets

General Manager – Business Innovation and Strategy
FCB New Zealand
"How to integrate a strategy team" (p.13)



Guy Murphy

Worldwide Planning Director,
J. Walter Thompson
"How agencies should make money from planning" (p.24)



Tom Morton

SVP, US Strategy, R/GA
"How planners and creatives can work together" (p.38)



Anthony Wong

Worldwide Effectiveness Director, Ogilvy & Mather
"How planners can make better use of data" (p.14)



Bediz Eker

Chief Strategy Officer,
Young & Rubicam Istanbul
"How agencies can deal with the rise of consultancies" (p.25)



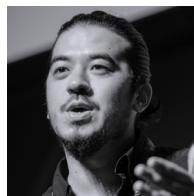
Mark Tomblin

Chief Strategy Officer,
Juniper Park \ TBWA
"Why strategy teams should sit together" (p.39)



Gareth Kay,

Co-Founder, Chapter SF
"Why planners need to break the chains of specialisation" (p.15)



Andreas Krasser

Head of Strategy & Innovation,
DDB Group Hong Kong
"Three skills to look for when hiring a planner" (p.31)



Sue Unerman

Chief Transformation Officer, MediaCom
"How strategists can challenge the status quo" (p.40)



Bridget Angear

Joint Chief Strategy Officer, AMV BBDO
"How strategists can move 'upstream'" (p.23)



Suzanne Powers

Global CSO, McCann Worldgroup
"How to build an effective planning team" (p.32)



Craig Adams

Strategy Director, Naked Communications
"How to set planners free" (p.41)

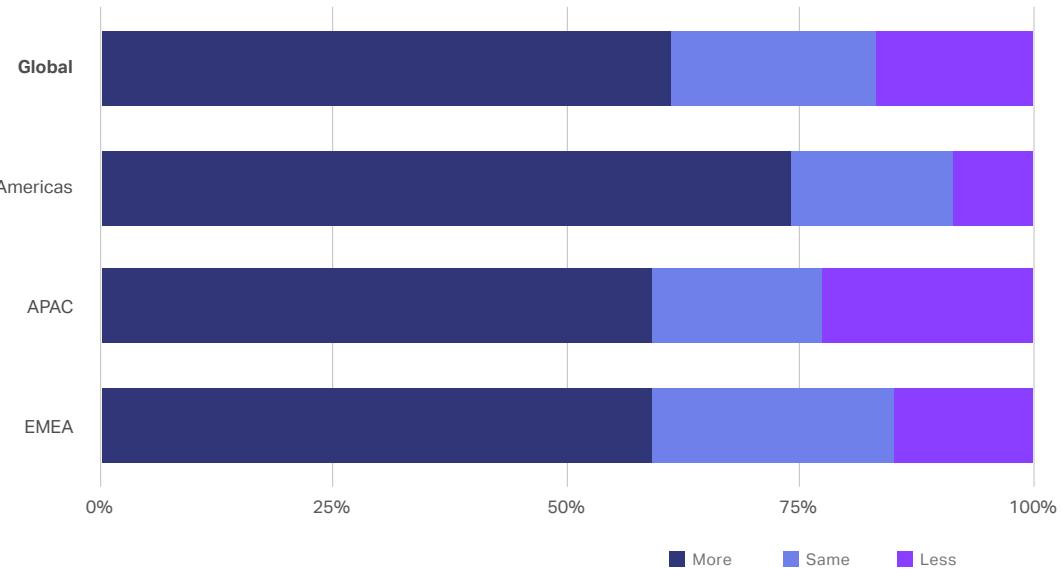
Chapter One:

The state of strategy



Strategists are gaining influence within agencies

Do you have more or less influence within the agency?



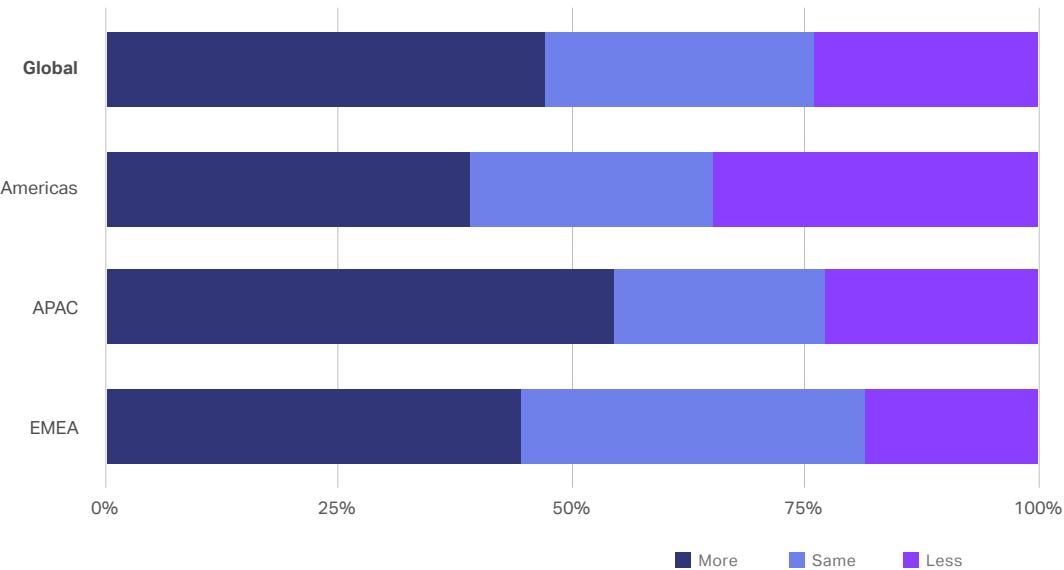
Question: Compared with the recent past, do you feel that the planning/strategic function has more or less influence in the agency?

Commentary

- ⌚ Agency strategists generally feel that the discipline has gained ground within their agencies: 61% agree that the planner is more influential now than 1-2 years ago. Just 15% globally see their influence as being on the wane.
- ⌚ Planners in the Americas were the most positive, with 74% saying that they had gained ground within the agency. APAC was the least optimistic region, with 22% feeling their influence had declined.
- ⌚ Within different types of agencies, digital/specialist shops were most positive, with 83% of respondents feeling more influential, compared to 63% of planners at media agencies and 60% of their counterparts at creative agencies.

They are less sure of their influence over clients

Do you have more or less influence with clients?



Question: Compared with the recent past, do you feel that the agency planner/strategist has more or less influence among clients?

Commentary

- Planners are generally less secure about their influence over clients than they are within their agency. Just 46% worldwide said they had gained ground over the past 1-2 years, compared to 61% who saw increased influence within their agency.
- In contrast to the agency results, planners in APAC were most upbeat about their client influence, with 52% seeing a recent gain in influence. By contrast, the Americas were gloomiest, with almost as many seeing a decline (35%) as a gain (39%).
- Media agencies were the most positive about their client influence, with 63% saying they had felt an increase recently. Just 49% of creative agency respondents said the same.

Overwhelmed clients need a 'marketing sherpa'

When asked why they felt that agency planners were gaining influence, many respondents replied they are increasingly being cast as an explainer – a “marketing sherpa”, as one put it – who helps others find a way through the increasingly complicated media landscape. The fast turnover of CMOs has contributed to this trend, with newly arrived clients often turning to their agency strategist for guidance. And this trend has also driven the rise of the agency planner in new markets outside of traditional planning centres like the UK and US.

“ Clients are overwhelmed. And when they are overwhelmed, they need more strategic stewardship.”
Global CSO, New York

“ The proliferation of data means that marketers don’t know how to work independently. It’s complicated and always changing. Planners help the clients feel more in control.”
Head of Planning, São Paulo

“ We are the ones that help them navigate – there’s always someone new coming in as the marketing director. But the agency planner is there to stitch together the old and the new.”
Planner, Sydney

“ CMO turnover is high – the new CMO comes onto a job and they want quick results – and they turn to the planner.”
Head of Strategy, New York

“ Clients want that big upfront strat deck talking about how the work will influence people. They don’t just want a creative there, making shit up.”
CSO, Toronto

“ I find that the bulk of clients who are local need more guidance with their strategy. And, as soon as they learn we are here, and what we offer, we become essential.”
Head of Planning, Manila

Fragmentation is changing the strategy function

Where once there were only brand planners, there is now an ever-increasing variety of connection, digital and data strategists. The fragmentation of the strategic function was a recurring theme in the responses to the question of whether or not planners are becoming more influential. Some see it as a positive, as it brings more skillsets into planning teams. Others feel they are struggling to keep up with the changes, and their teams are drifting apart.

“I have 13 people on my team, and nobody has the same skillset. There are specialists in brand, media, social and analytics. I’d say strategy as a whole is more influential – but the traditional brand planner is toast.”
CSO, New York

“The agency’s response to clients has changed, but the planning function has still not caught up. The brand strategists are still separate from the social strategists.”
Planning Director, Shanghai

“Planners’ jobs have become bigger, because the market changes mean that there’s far too much for one person to know or deal with! And that means senior strategists are becoming more like strategy managers, rather than setting the strategy themselves.”
CSO, London

Some say 'big picture' thinking is under threat

The fragmentation theme was mentioned by respondents around the world. Some are concerned about the future of big picture 'brand planning': in a world of specialisms, who develops the overall brand strategy? Others, however, feel that integration of strategy functions is possible – and, increasingly, is taking place.

“Brand strategy is under threat, and that's very sad. We are very threatened by unbundling and fragmentation.”
VP for Strategy, San Francisco

“Among strategists, everything is more diffuse. It's much more multi-disciplinary, with digital, mobile and content agencies all having their own strategists. It used to be much more cohesive.”
EVP, New York

“About five years ago, you used to have a lot of splintering between different specialisations. But now I think things are being pulled back to the core planning function, because digital is everywhere now.”
Planning Director, Portland

“In the fragmenting media landscape, the one thing that is essential for agencies to give standout is brand strategy. And the more things fragment, the more it becomes important.”
Head of Planning, Milan

How to integrate a strategy team



Murray Streets
**General Manager – Business
Innovation and Strategy**
FCB New Zealand

I've helped integrate strategy teams at two agencies now.

It's a two-stage process. First, you need complete buy-in from management and agency stakeholders. The process will cause disruption and confusion, and people in organisations do not like change. All of the management

team needs to appreciate that if you are transforming the strategy team, you are in effect transforming the agency. So integrating strategy teams can't happen in isolation of a wider effort to integrate all disciplines and departments.

Second, you start to bring in people of different disciplines to your team of account planners: they could be from digital, data, CRM and direct, from within the agency, or through hiring externally. At the same time you broaden the team's remit to "strategy" rather than what I think is the more confining term "planning". We think in terms of generalists and specialists and how we blend these skills.

Currently, I'm the head of a department of 10 at FCB. Day by day, my job is to choreograph our resources to solve problems. That's more work but way more exciting because as a genuinely integrated team we can exploit the power of complementary skillsets.

This means I can cast the lead strategist on a specific account depending on their unique

experience. For example, for a big tech-oriented brand, the lead strategist would have a strong digital background, and would be supported by more of a generalist. On the other hand, a classic FMCG client would be led by a generalist, with a digital specialist supporting.

You should expect some challenging conversations with team members, existing and new. Integration is a significant leadership challenge. And you can't underestimate the emotional intelligence required for a diverse team to really build trust.

I've found that for those generalists, change can provoke a fear of being left on the shelf: a generalist might ask, if there are all these digital, direct, channel and data strategists coming into my team, does that mean my skills are obsolete?

Or they might feel that the agency doesn't have a "proper planning" team any more – that it's turning into an island of misfit toys!

On the flip side, I've also had some frank conversations with team

members whose specialisms are in digital or direct – when they were feeling a bit nervous about engaging with "the brand stuff". But when they pick it up, they come to practice wider marketing and strategy with greater confidence.

Looking ahead, progressive clients understand the power of having teams that are integrated. It makes their lives easier in an ever more connected and complicated world. And it produces more effective and enduring solutions.

I concede that my agency, which has media in-house, is an unusual example. I'm very lucky: it's the way it should be but for the most part isn't.

I think progressive marketers will increasingly demand the best integrated thinking. If they can't find this with a single agency, they will demand this from their direct, brand and media agencies, breaking down the barriers between them, and attempting to build a "brains trust" to get more integrated work.

But genuinely effective integration across agencies is really hard to achieve and rare in my experience.

How planners can make better use of data



Anthony Wong, Worldwide Effectiveness Director, Ogilvy & Mather

In future, the USP of the successful agency planner will be their ability to synthesise different data sources. But today, the rise of trackable data means that agencies run the risk of being cut out of the conversation.

Many clients don't see the value of hearing the Facebook data from an agency – instead, they want to hear it from Facebook. This isn't good

news for the agency planner, and it won't help the client much either. Facebook data, after all, should be used only for a Facebook strategy.

Years ago, clients had some brand metrics, and some media data: TV, radio and print metrics. Now they have many more different sources, due to the rise of digital media platforms, and different data within each of these platforms: likes, views, shares and so on.

This is confusing to the client. While advertising is increasingly measurable, the client only has so many hours in the day to go over the reports. And their marketing choices have to go alongside all sorts of other data-driven choices, from pricing to logistics.

That's where the agency planner comes in. It's up to the planner to use different combinations of data to create new strategies for clients. A planner who is really useful for a client would be able to look at those reports and build the strategy from there. Armed with their detailed, data-driven analysis, the planner can help the client figure out the

roles of all of the individual channels in this overall strategy.

This also means that some planners will become obsolete. No longer will the planner be able to walk into the room and be the "cool trends person" with access to secret stores of knowledge. Because everyone in the room now has the ability to Google. People who think they can get by on traditional brand planning skills alone clearly can't survive. Planners with data skills, on the other hand, will find their value increasing.

I'm not suggesting that everyone should become more like media planners. And I'm not suggesting that the "big idea" should be ignored in favour of individual channel executions, as the client will most often do those tactical jobs.

Instead, planners need to be advising the client on what is the best place to say what to whom. And advise how these communications support and strengthen the big idea that goes across the campaign.

Everyone needs to get up to speed on this. We at Ogilvy conduct a lot of training in digital and data skills.

And we have a new mantra that has guided this decision – [Make Brands Matter](#). You avoid optimising each channel in isolation. Instead, you synthesise data sources to create the strategy, and therefore become the client's partner in creating sustainable, long-term brands.

The brand planner really needs to be the guardian of core brand values. There have been [many cautionary tales](#) recently of campaigns that have not achieved this.

But I remain optimistic for the future. Data-driven, brand-focused planners will become the 'go-to' partner for clients in need of overarching strategic help. They will diagnose problems and prescribe solutions across the marketing mix, with more accuracy than ever before.

To achieve this, she or he knows what the customer data – across virtual and physical circuits – mean better than anyone. And he or she uses that knowledge to bring evidence-based – not just opinion-based – leaps forward to the table. To free the imagination and encourage bolder creativity.

Why planners need to break the chains of specialisation



**Gareth Kay,
Co-Founder, Chapter SF**

So, the results from the WARC Future of Strategy survey say that we're frustrated by the march away from long-term work, and towards short-term project work.

Well, to me this suggests that perhaps planners need to be the change agents inside their agencies and help change how we work to guarantee a more fulfilling future.

How do we get to this future? I've

said this before, and I'll say it again. We are specialising ourselves into irrelevance.

If you look inside client organisations, you see more silos and specialisms than ever before. The same is true within the marketing function.

What's more, clients have more companies advising them than ever before. Where did these agencies come from? The impetus for this trend lies, at least in part, with the agency holding companies' continuing strategy of diversifying their services. They do this in order to drive their revenues.

This of course means there is more focus on channels and activities, and less focus on the client's actual business problems. And it means there is more impetus – explicit or not – for us to offer advice that is self-serving rather than value-driving.

You can also see this fragmentation within the planning discipline itself – where once there were only planners, there are brand strategists, growth strategists,

communication strategists, digital strategists, mobile strategists, social strategists, and so on. I'm surprised we haven't gone retro and created the TV strategist and print strategist to complete the set.

All of this fragmentation in the core role of the planner is creating brands that are fragmented into a million little pieces.

We continually fail to deliver a coherent end-to-end brand experience.

We end up solving our problems, not the client's business problem. We are exerting our efforts on downstream, tactical activities – and we are not zooming out to see the bigger picture.

This over-specialisation problem is only amplified by the increasingly short-term nature of our engagements. We know that the truly valuable effects of brand building – such as rising base sales, commanding a price premium and, as Judith Williamson so wonderfully puts it, "building empires of the mind" – takes time.

Yet increasingly we are being

asked to work in short-term bite-sized projects. And, increasingly, we planners are being disincentivized from thinking and working long and broad, rather than short and narrow.

There's an urgent need, in my opinion, for the return of what I call the "informed generalist".

The informed generalist is a planner who is able to see the whole picture and design the right solution, unencumbered by the chains of specialisation.

Who is obsessed by the outcomes they create, not just by the output they make.

Who can join up thinking and deliver a solution across time and space.

Who is able to zoom in and out as required, in order to see the forest and the trees.

This may seem the opposite of where we are going. But if we don't address this, I fear we risk ceding more ground – intellectually, financially and in sheer unbridled enjoyment – to the advisor who still thinks long and broad: the management consultant.

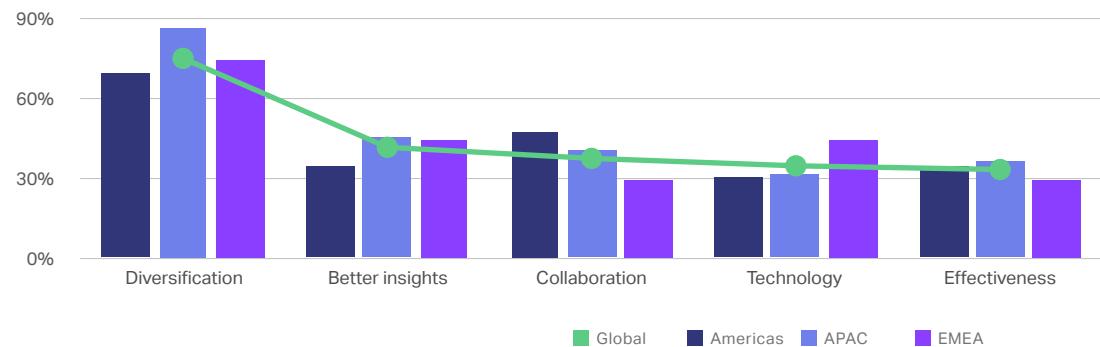
Chapter Two:

Opportunities and challenges



Strategists are looking beyond campaign planning

What are the biggest future opportunities for strategists?



- 1 **Diversification:** Planners can move beyond ads to solve clients' business problems
- 2 **Better insights:** Planners can use their human intuition to get better insights
- 3 **Collaboration:** Planners can work more closely with others in the agency, with clients, or partners
- 4 **Technology:** Planners can use new tech and tools for shaping the strategy
- 5 **Effectiveness:** Planners can measure the effectiveness of the work with greater accuracy

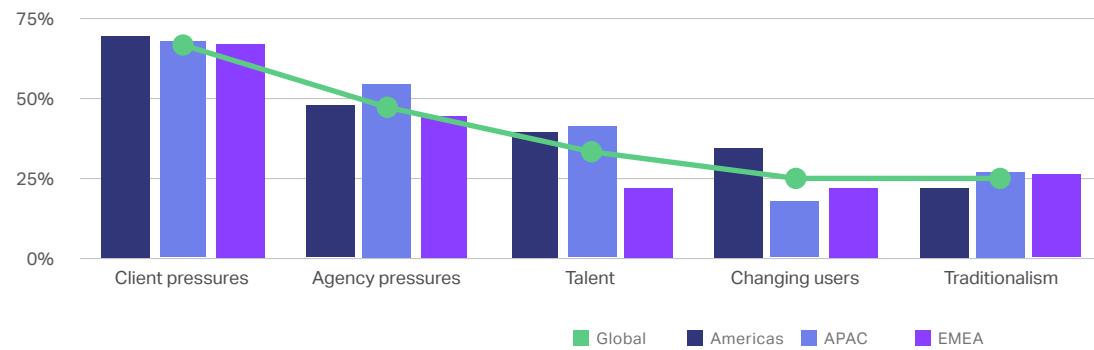
Respondents could choose up to 3

Commentary

- ⌚ The standout opportunity for planners, according to the survey, is the diversification of agency services towards solving "upstream" business problems, rather than only communications problems. It was cited by 72% of respondents globally, rising to 87% in APAC.
- ⌚ But many participants also highlighted the fact that tried-and-true planning techniques would still be relevant in the future: 40% of planners globally said that using their "human intuition" to get better insights remained a key future opportunity.
- ⌚ Effectiveness and using new technology were consistently the least-cited opportunities for the future on the list, across regions.

Short-termism and tight budgets are major threats

What are the biggest future obstacles facing strategists?



- 1 **Client pressures:** Focus on tactical campaigns, short-termism, cutting costs
- 2 **Agency pressures:** Divide with other agency teams, lack of time, training and support
- 3 **Talent:** Recruiting and retaining planners is getting harder, there's a 'brain drain'
- 4 **Changing users:** Audiences are becoming harder to reach with communications
- 5 **Traditionalism:** Planners are clinging to traditional ways, not embracing technology

Respondents could choose up to 3

Commentary

- 🕒 Perhaps unsurprisingly, client issues – and specifically a focus on short-termism and cutting costs – represent the biggest single future threat to agency planning. It was cited as a major obstacle by 67% of respondents globally, and was the most-cited threat in all regions.
- 🕒 Internal agency pressures were the second most commonly-seen threat. Digital and media agencies were slightly more likely than their counterparts at creative agencies (50% vs 45%) to mention this issue.
- 🕒 The 'brain drain' from agencies to other companies, such as media and tech vendors, was the third most-commonly-cited obstacle to future progress, though it was much more likely to be cited in APAC (43%) and the Americas (39%) than EMEA (21%).

Strategists are looking to go 'upstream'

Planners see 'upstream' thinking – going beyond communications campaigns and towards tackling the client's deeper-lying business problems – as the biggest single opportunity for the future. This is a space beyond advertising, and one in which agencies as a whole would like to play.

“ There's going to be a polarisation: strategists that do the upstream thinking, and the others – working out digital and media buys – that are downstream. ”
CSO, London

“ The work is changing. Sometimes, the client will go into a strategic project before they go to the creatives. Or it can be a strategy-only project, like setting a brand purpose. ”
Head of Planning, London

“ Clients are searching for big, organising ideas – not tactical strategy. And not just individual campaigns. ”
Agency founder, San Francisco

“ As an agency, we really want to move from a project-based business model to something more future-oriented. And I think the only way you can get the client to do that is to have a strong strategist to lock them in. For long-term relationships, strategy is essential. ”
Senior Strategist, Paris

“ The agency's services being more involved in business issues has given the planner a seat at the table that we simply didn't have before. ”
Head of Strategy, New York

But there is growing 'downstream' pressure

Despite their 'upstream' aspirations, the reality for many strategists in the survey is an increase in 'downstream', short-term, project-based work. Many respondents argue that more and more clients are preferring to ask them for tactical executions, not big-picture strategy, due to tightening budgets. There is a growing disconnect between the work strategists are doing, and the work they believe they should be doing.

“ There's more of a focus on practical executions – on a project basis and short-term. More and more we are just pitching for campaigns. There isn't an ongoing relationship. ”
Head of Planning, Sydney

“ Most of the clients are suffering from the need to have immediate results. The agency planners are thinking about long-term results. Our network's brand activation agency is actually much more valued by the client because they are giving them data more quickly. ”
Global CSO, Chicago

“ When clients tighten their belts, strategy is vulnerable. The retainer-based principle has changed – we were just on a retainer in the days when a client didn't look at their budgets so critically. Now they are keeping a closer eye on things. ”
CSO, London

“ Clients know they need strategic thinking. But it varies as to whether they allow it – either financially or from a process point of view. And the timelines are often too tight. It's challenging to deliver in this context. ”
Global CSO, London

“ For the bigger clients, they are trying to procure their way out of paying for strategy. ”
CSO, Los Angeles

New competition from consultancies

As strategists look upstream, they are facing increasing competition from other types of company. Consultancies such as Accenture, PwC and Deloitte Digital are increasingly targeting marketing strategy – whether by adding marketing services to their repertoires, or directly acquiring agencies. They represent competition both for client briefs and for talent. Agencies are also coming into competition with tech vendors.

“ Clients are going to other sources for strategic advice. Accenture is moving in. They’re talking to platform partners directly, too. ”
CEO, Singapore

“ A lot of management consultancy firms are coming in with strategic services. Agencies need to evolve, because a lot of the time these services are exactly what clients want. ”
CSO, New York

“ Every client seems to have at least two extra strategy firms. Sometimes I wonder how many CSOs you can possibly fit in a room! ”
CSO, San Francisco

“ We were at the high table 10 years back. Not any more. We are clawing it back by incorporating more consulting functions. We are recruiting from people like Deloitte. Agencies are restructuring – it’s going to take some time for the clients to pick up on this though! ”
Planning Director, Shanghai

“ So many people need strategy, not just agencies. I can’t help but wonder whether planners will just go, fuck this! I don’t think we are winning the talent wars. If I was 22 years old, strategically minded, and quite good at maths, I’d work in tech. ”
Head of Planning, Amsterdam

But planners still provide valuable human insights

Several respondents argued that where the consultancies and tech firms will struggle is in one of the brand planner's traditional strong points: delivering great cultural and human insights. Not everyone agrees, though: as agencies move upstream, some believe a strong business understanding, rather than an insight, will become the common starting point for strategy.

“ Comms agencies' key strength in overcoming the threat from consultancies is the more human services they offer: we're well-placed to say, Deloitte and KPMG have got all this data that you don't understand – but we've got the great human insight! ”
Planner, Melbourne

“ The strategic function is important and will remain important, because the need for what the strategist does – being the eyes and ears of the consumer – will stay the same. ”
CSO, London

“ You can automate a media buy. You'll always need that human insight. ”
EMEA CSO, London

“ I hate it when people think good work is all about the insight. Actually you need to define your business goals first to get to the insight. The insight is just consumer research, really. That comes later. The insight is what planning was 50 years ago – it's not what it is today. ”
Head of Planning, New York

How strategists can move 'upstream'



Bridget Angear, Joint Chief Strategy Officer, AMV BBDO

A great strategy can cause a big behavioural shift that solves a business problem for the client. And planners have always dealt with these "upstream" issues.

One great example of upstream strategy is [a recent IPA paper for Transport for London](#). They had an interesting problem: in the run up to the London 2012 Olympics, TfL's modelling showed that the city's

transport network would not cope with demand. So they had to make people not do something they do every day – travel into the city – for the good of the country.

The team used channels ranging from direct mail to posters to PR to achieve this shift. It was a really efficient campaign. And, if they hadn't solved the issue, London would have been gridlocked. That's big, upstream strategy: comms leading to real change.

But of course, we as planners need to work "downstream" some of the time. Day to day, you are looking for big and small insights. You are seeking human truths, but also need to deal with details – deploying the strategy across different media, for example. Shifting between big and small. It's just that, at the moment, we have gone too small.

There are several reasons for this move downstream. These days, ideas have to live in more places, as we seek out the audiences we want. It means we need to spend more time working out "the ecosystem of an idea" – where the idea should live,

how it should live, how it connects across all the different channels and how to optimise it for each.

We can also see in real time how an idea is performing. We can monitor it and optimise it as we go. Something that was simply not possible with more traditional broadcast media now is possible. This measurement can be useful. But it can mean the urgent takes priority over the important, and we spend more time making little adjustments than addressing the bigger issues.

Part of this downstream focus is client-driven. They've gone to the Silicon Valley HQ, had a ride in the driverless cars, drunk the Kool-Aid and have come back believing that Facebook and YouTube are the future. When, in fact, while they are amazingly powerful reach media, it doesn't mean they are the only thing we should be thinking about. As Byron Sharp has observed, some clients now brag about what percentage of their media budget they now spent on digital, rather than what the optimum mix should be.

This all means that, as an agency,

we are asked more and more what I call 'deployment questions'. Which in turn means we have less time to consider questions about where to take a brand over the longer term.

That's the situation today. But I think this is just a moment in time, a blip. And this is because we are still in the process of working out what is and isn't working, a beta phase. And once we know more about how to measure, we will be able to spend less time doing it. More clarity around effectiveness will mean we will spend less time experimenting.

Eventually, there will be a course correction. We – not just planners in agencies, but marketers in general – will realise that we have been distracted by 'new' media and that many of the principles we have always known to be true still are true. We will then be able to re-focus on upstream business challenges.

If I project forwards, I believe that planners of the future will still be asking and answering the big strategic question of how can communications help drive business growth. That's my dream, anyway.

How agencies can make money from planning



Guy Murphy, Worldwide Planning Director, J. Walter Thompson

It's ironic that planning, the most effectiveness-minded discipline, pays little attention to whether it creates a commercial return.

Maybe this isn't surprising given that historically planning was given away for free in the days of media commission. It's also a discipline whose value is just harder to see.

Why does this matter? Look at the results of WARC's Future of

Strategy survey. Globally, 67% of respondents cited client cost-cutting (and short-termism) as the biggest obstacles to planners in the future. Here's some representative quotes that will be familiar for many:

- ⌚ "When cost savings are needed, planning gets diluted."
- ⌚ "For the bigger clients, they are trying to procure their way out of paying for strategy,"
- ⌚ "For some clients, planning is one of the first things they cut."

The planning industry needs to worry about getting paid.

Clients still have money for agencies, of course (unhelpfully described as 'non-working budget'), however, they are being more ruthless about how they spend it.

So is planning one of the things that clients truly value? WARC's research found that 61% of respondents felt planning is having more influence within agencies. So far so good. And yet, a much smaller figure, 46%, said planning was gaining influence among clients.

I have no doubt that clients need planners' skills more in our complex world: they interpret change, envision brand futures, and inspire great content and experiences. But, as a planner, I too am biased.

Is the value of this contribution obvious enough to clients? The WARC research hints that we have a problem. To me, agencies have three ways to respond.

1. Make planning more efficient. Do more, for less, more quickly. Prioritise its high value contributions. Make it skim, with impact, across multiple client projects. This is probably the realists' option. Sweat the planning assets.

2. Invest. Make planning a fundamental part of the agency offering whether it's paid for by clients or not. Take the short-term margin hit for a belief in longer term agency strength. The purists' option, but commercially challenging.

3. Grow – or at least defend – client fees for planning. Obviously, there are new specialist strategy services to sell, from analytics to UX to social media. But creating organic growth

in brand planning is key. This is the confident route forward. But tough.

Stop giving planning away for free. Every time any agency breaks ranks and throws some strategy hours in for nothing, then we all suffer. planning matters and all agencies need to hold their nerve.

What is key is for planning to add value to a client's business. That requires knowing what 'value' means for any client, tackling the bigger issues, not the smaller ones, providing faster and higher quality solutions to those issues than the client can create on their own.

Equally important is the need for planning to be seen as adding value. So make the strategic contribution visible. Take the time to present and explain your thinking to clients. And highlight how they make a difference to the final outcome. Just like at school, you get marks for showing your 'workings out'. And, of course, measure, measure, measure to show you were right.

Planning's future value will depend upon its ability to show that planning matters.

How agencies can deal with the rise of consultancies



**Bediz Eker, Chief Strategy Officer,
Young & Rubicam Istanbul**

While advertising agencies all around the world have been suffering from falling profits, consultancy companies such as Accenture, PwC and Deloitte have been climbing up the largest global agency rankings. It's clear. Consultancies are on the rise, and this rise is putting pressure on advertising agencies.

As planners in agencies, we can interpret this trend in many different

ways. But, unarguably, the rise of consultancies gives us several hints about what it is our clients are really looking for.

Firstly, it is that the agency's ability to find creative ideas is no longer enough to justify its *raison d'être*, and its relationships with its clients. Instead, clients are expecting their agencies to come up with creative solutions to their business problems. For the agencies that want to fulfill this core demand, the strategic planning department plays a pivotal role in this new service offering.

During the Mad Men era, agency executives used to have a say in their clients' major business decisions, often during a fancy dinner in a nice restaurant. But today, having previously put together some cool ads for the client doesn't automatically give you the right to take part in these decisions: especially when they are data-driven, based on analytics rather than gut instinct.

Therefore, you need to have designated staff – in advertising agencies' case, strategic planners –

who can dive into the precious data already at clients' disposal, and distil the data into actionable insights. These insights will not only catalyse creativity, but will also help clients improve the journeys they offer to their consumers. And CMOs will increasingly wish to involve their agency's strategic planners with their decision processes.

At my agency, we have more and more clients asking for the strategic planning department's views about various business issues varying from product portfolio management to pricing. Going beyond communications.

We strategic planners have earned this credibility thanks to our thorough data-driven understanding of the client's business and consumer truths. Clients especially value how we interpret the data according to the big picture and come up with creative solutions.

Of course, understanding a client's business through data is a service offered by consultancies as well. But strategic planners gain the high ground by bringing creativity

into play. Moving beyond the data, planners provide a blend of creative mindset and business perspective. Hence, the outcome of the strategic planner's quest for untapped consumer truths is crucial for both the creative output and designing a unique journey around products and services. In both cases, brands have to come up with engaging experiences in order to win the hearts and minds of the consumers.

Therefore, a strategic planner's advocacy of consumer truths will be appreciated not only by ECDs – but also by CMOs.

If the agencies want to break their vicious financial cycles and build a collaborative relationship with consultancies, instead of competing with them, they will have to put their strategic planners on the frontline. The strategic planning department's unique perspective on creativity and data will help agencies gain access to business strategy development, as well as communications projects.

This will not only justify agencies' value, but will increase the influence of strategic planners.

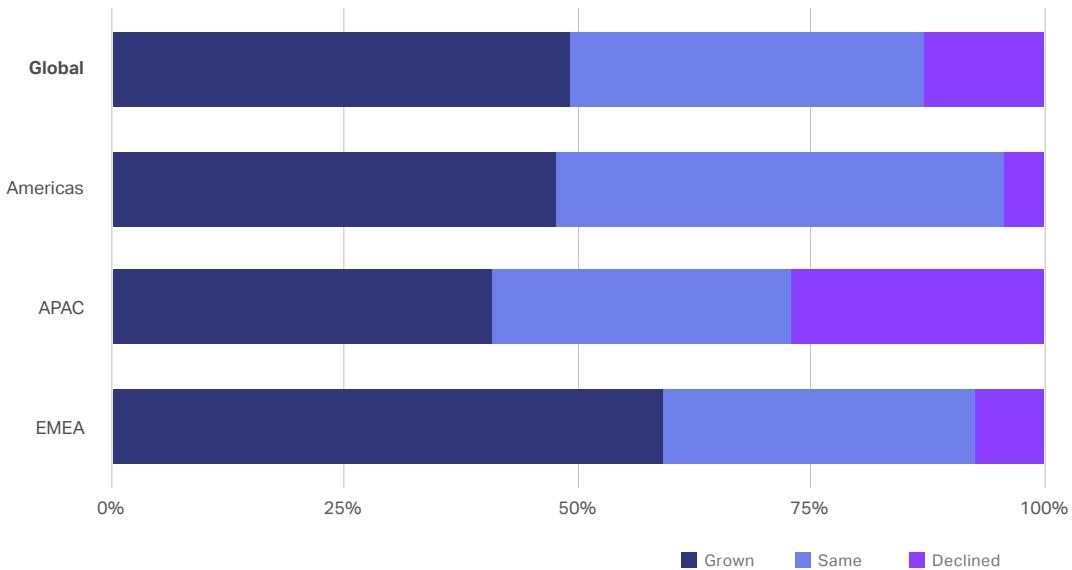
Chapter Three:

Building the planning team of the future



Strategy teams are generally growing

Has your strategy team grown or declined in number in the past 12 months?



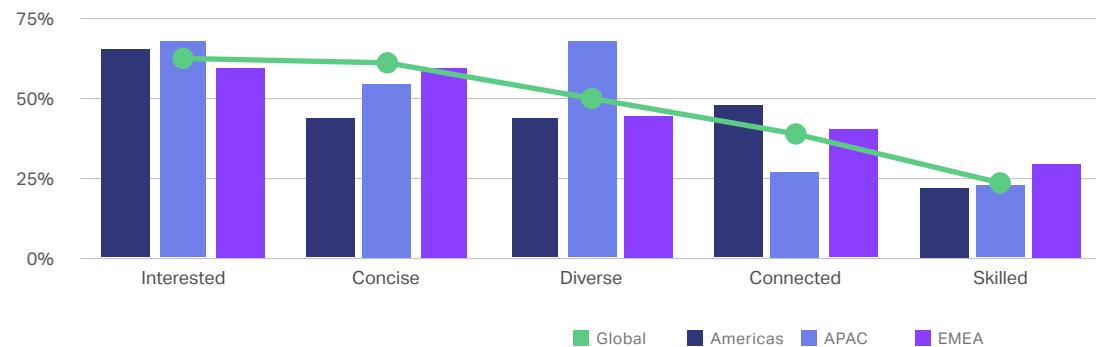
Question: Compared with 12 months ago, has the size of your planning/strategy team grown or declined?

Commentary

- ⌚ Hiring is strongest in EMEA, with 60% of respondents seeing an increase in size of their agency's planning team over the past year.
- ⌚ But the situation is more volatile in Asia-Pacific, with over a quarter of respondents saying planning teams had shrunk in the recent past.
- ⌚ By agency type, Digital/Specialist teams were most likely to have increased (67% of respondents). Meanwhile, 53% of creative agencies said teams had been growing, compared to just 13% of media agencies.

Wanted: Enquiring minds

What characteristics are you looking for in a new strategist?



- 1 **Interested:** Open and always wanting to learn more
- 2 **Concise:** Able to distill complex information into an insight
- 3 **Diverse:** Team from different backgrounds, perspectives
- 4 **Connected:** Works well with other agency teams
- 5 **Skilled:** Craft or technical skills, academic qualifications

Respondents could choose up to 3

Commentary

- ⌚ Being interested and open was the single most-prized characteristic of a new planning hire globally, with 63% of respondents citing "always wanting to learn more" as an important reason to hire a planner.
- ⌚ Diversity was the standout reason to hire in APAC, cited by 70% of the sample - in contrast with the Americas and EMEA, where it was only the third most commonly-cited characteristic.
- ⌚ Perhaps surprisingly, craft skills were consistently rated the least-important of the five characteristics across all regions.

Traditional skills, at a greater speed

The key skills of a strategist – an enquiring mind, an ability to distil complex information – do not appear to have changed. But the pace they need to work at is quicker. This means strategists are increasingly looking to hire planners who can work at speed.

“ The role of planning hasn’t changed: it simplifies complex issues. ”
Planning Director, Shanghai

“ Strategy has become a game of hours. We don’t have time. I may be given an eight-week project, with two weeks to crack the brief. Sometimes shorter. The modern planner has to be able to work quickly and make assumptions. ”
CSO, New York

“ We are now in a real-time marketing world, moving from campaigns to conversations. People want to know if it’s working faster. That’s [a challenge] for the planner. ”
Head of Planning, San Francisco

“ Planners don’t necessarily know how to be credible and well-researched in a far shorter space of time, and on a far smaller budget. The byproduct of that is that the creative function plays a bigger role: we need to move it through to them quicker – and the brief is half-baked, because we haven’t had time. ”
Senior Strategist, Sydney

“ We don’t have much time these days, so the creatives value us more. Time pressures have made the planner more important. Advertising used to be much more relaxed! ”
Head of Strategy, Chicago

Diverse teams perform better

Several respondents mentioned the need for greater diversity – in terms of background, age and skillset – within strategy teams. There is a feeling among some that, as the nature of the strategy function has diversified, different points of view are needed.

“ Our industry really struggles with diversity – gender, culture and ethnicity. I've worked in planning departments where it's all just white men from upper middle class backgrounds. It's so same-same. The planning cultures I love and try to build are multinational, with all different backgrounds, spotting talent wherever it is. ”
Head of Planning, Amsterdam

“ We have a massive diversity issue. Many of the 'great minds' have been doing the job since the 90s, and aren't willing to accept that this business has changed massively. And that the people coming up now are very different. ”
Director, Munich

“ We need different, diverse, points of view if we are really going to crack a brief. ”
Head of Planning, Bogotá

“ We need to foster inquisitive people. You celebrate people who are both qualitatively smart – empathetic and imaginative – but also quantitatively smart. ”
CSO, London

Three skills to look for when hiring a planner



Andreas Krasser, Head of Strategy & Innovation, DDB Group Hong Kong

According to WARC's Future of Strategy survey, when hiring for their teams, the standout candidates senior planners are looking for are curious and concise people from diverse backgrounds. For me, hiring really comes down to the candidate's ability to be concise: or, put another way, their ability to simplify.

Great planners need to ask the right questions that help narrow

ten objectives down to one. They transform gigabytes of data and dozens of Powerpoint decks into one relevant insight. And, they make sure that success gets measured, not against as many as possible, but only against the most appropriate key metrics.

If you think about it, planners are a bit like conductors. They decipher and orchestrate meaning and actionable plans from a mix of tactile inputs, digital signals, and cultural trends. A great planner adapts to the mayhem of modern times by accessing information in real time, and continually – concisely – transforming this information into actionable insights.

Beyond this general ability to be concise, here are three core, practical skills that, in my point of view, the planner of the future should have.

Core skill #1 – Derive attitudinal and behavioural insights

Through focus group interviews, social listening tools, and other methodologies, planners of our

times should uncover attitudes and behavioural consumer insights that help resolve a business issue or propel a business/brand growth opportunity.

Why it matters: All the hype around big data has made us overlook the fact that while behavioural insights tell us what people do and when they do it, they are not able to explain people's motivations behind their actions. Only the symbiosis of big and small data will give clients a holistic and contextual understanding of their target audiences.

Core skill #2 – Craft experience briefs

Great planners are able to write creative briefs that are based not on a pointy tagline-like proposition, but on a single-minded thought that clearly explains the intended campaign experience – to inspire big, media-neutral ideas.

Why it matters: Experience briefs matter because they recognise the importance of people's social connections and prompt creative ideas that have the potential to go

beyond just ads and become truly relevant to people's daily routines. And that's what allows brands to cut through competitive clutter and build brand trust for the long run.

Core skill #3 – Provide real-time strategic counsel

Great planners add value and strategic counsel at every stage of the creative process – starting from ideation all the way to production, and even beyond the campaign.

Why it matters: With consumers being able to interact with brands and their campaigns on an ongoing basis, it's crucial to keep track of people's reactions and their sentiment. This generates insights for future initiatives, and also uncovers opportunities that could help a campaign maintain momentum through earned media.

At the end of the day, however, it's all about simplification. Making sense out of chaos, defining the problem, and creating a blueprint from A to B.

It's as simple as that – which is what makes it so hard to be a great planner.

How to build an effective planning team



**Suzanne Powers, Global CSO,
McCann Worldgroup**

Building teams is something I've been passionate about since the beginning. Because at the beginning of my career, I was alone.

I started planning so long ago that I was one of a team of three research people who turned into planners. Then, there were only two of us by the next week. Then it was just me.

And I hated it. Because a great planning team depends on a

meshing and merging of different perspectives, backgrounds and expertise. Not just one person, alone.

In those days, I would go out and find a team for myself: sometimes from account management, sometimes the creatives, sometimes the client. The point was to benefit from other inputs. This thought has driven my entire career.

Today, I lead the strategy teams at McCann Worldgroup: a company with 24,000 people globally. When I started, I was talking with a man who is now a dear friend of mine: Rob Doubal, a creative leader in our London office. I asked him: how do we build teams that think about creativity in a fresh way?

He said: "I have this weird theory. I put a bunch of ingredients together, and if I get really lucky... it's an atomic soup." In other words, it's explosive!

It's tough to make an atomic soup. Because of P&Ls. Because we're stuck in our silos. Because of where we get the funding from. Even so, I took that notion of Rob's, and I've been running all over the world, trying to make as many soups as I can.

As you start on any client challenge, we start with the problem, based on a human need. Then we figure out the stuff we're going to need to throw into the soup, to make it atomic.

We have some secret ingredients at McCann Worldgroup. Firstly, we've redefined the philosophy of the company, so that everybody knows what we are about and why we make what we make. It is that when the Truth is Well Told, it has the power to move people, thus shifting a market. Our mission is to help brands play a meaningful role in people's lives.

Second, we've built an approach and toolset that delivers that mission. This means our teams work the same way, whether it's a global team across 12 markets or five people jumping onto a project at warp speed.

That brings me to the next secret ingredient: our communities. They used to be called "councils," but councils were hierarchical – and judgemental. People were looking at each other's work, and giving it a rating, whereas communities build together. At McCann Worldgroup, we invest in global and regional

strategy communities, we have digital communities, we have creative communities, and we have business leadership communities. All working together through our shared language and approach.

Underpinning this are our shared values – essential to drive the behaviours of any great team. The first is generosity of ideas and spirit. One has to be generous when you are in a community. You give as much as you take. There's no room for egos

Another essential value is integrity of our people. That they attack everything with a purity of intent to get to the best creative answers for our clients' challenges. Again, no ego of the individual, but a relentless focus on the ideas and how they will live in the world and affect culture.

The third value is bravery. The belief that what we are making requires it (bravery) for ourselves and for our clients. This is about being confident, truth-based and insight-rich so that we can take the leaps together.

Philosophy, approach, values. And focus on the work. That's how we build an effective team.

Chapter Four:

Building a planning culture



Collaborating with creatives (and the seating plan) is key

Resolving the – sometimes fraught – relationship between planner and creative remains a major challenge in building a successful strategy team. Getting the agency's seating plan right is one solution – though respondents disagreed over whether strategists should sit together as a team, or sit with creatives on client teams.

“Despite all that has changed, one of the things that has held constant is the sanctity of the relationship between the planner and the creative. It was always important. Now it's become even more important. The strategy department needs that constant collaboration to flourish in the future.”

Global CSO, New York

“I would love to see planners embedded more in creative departments. It shouldn't be art and copy – it should be art, copy and planning. That's the holy trinity!”

CEO, Singapore

“There needs to be a seamlessness between the strategy department and all the other departments. It's not a relay race. It's a collaborative endeavour.”

Head of Planning, San Francisco

“We've been experimenting with seating, we have been sitting at round tables – all together – and that created a much more open environment. I saw planners and creatives going to lunch together, and those friendships wouldn't have blossomed without the environment changing. Lots of ideas come that way.”

CSO, London

“Planners should all sit together. There are always fewer planners than account people. We'll always be in the minority. So we should be together.”

Head of Planning, London

Strategists need the right tools and processes

Access to good business processes and tools is crucial to a better ‘planning culture’ in agencies, according to the survey. This includes an agreed set of approaches to cracking a brief that the strategy team can follow. However, several respondents suggested many junior hires lack an understanding of the strategy ‘basics’, and that there is a general need in the industry for more training.

“ We have a clear method that everyone uses for strategy-setting. It’s a series of conversations that need to happen between various people – about the category, the company and so on. Only once that happens is the strategy set. Though there’s not a fixed order to these conversations – there isn’t a formula for strategy. The agency needs to give their planners resources for the tools they need to help them set the strategy quickly – but still have that strategy be good.”
CSO, New York

“ What’s needed is rigour in training, young planners doing due diligence on core basic skills.”
EVP, New York

“ Agencies have codified it, it’s all there in the writings of Stephen King. Nowadays, planners use these tools, but they don’t know where they are from.”
Global Head of Planning, London

Strategists still need space to think

Many respondents brought up the ongoing need for strategists to have a degree of independence from clients, in order to bring fresh perspectives to them. This may mean it falls to the strategist to challenge the conventional view or groupthink. Some also said that strategists also need to get out of the office, hit the road, observe – and gain the valuable human and cultural insights they need to crack the brief.

“ The best planning departments have a degree of intellectual freedom. Where you’re not too leashed to the client – or the creatives.”
Strategy Partner, San Francisco

“ You need to be encouraged to be the voice of critical reasoning, out of kilter with the rest of the agency. Planning is at its strongest when it gives a really considered, evidence-based view [that is] right for the customer, not what the agency is selling.”
CSO, London

“ You need the space and time to think. Think generally. Be proactive. Have the space to brainstorm, to think outside of the box, to go to conferences.”
Senior Strategist, Paris.

“ It’s about openness. Going into the world and doing your own research. Not being at your desk all the time. Not everything being about meetings in the office.”
Head of Planning, Melbourne

Strong leadership can build a 'planning culture'

When asked what made a great planning culture within an agency, one recurring theme was the role of leadership – how the senior strategist motivates their team, and their status in the broader agency leadership team. Some agencies, particularly those without a heritage in strategy, are building corporate 'values' or purpose that extend into the planning culture. Others look for a more grassroots-up approach.

“ We have an incredibly important leadership team, which means that the strategists here are very supported. We are celebrated. There's a heritage to that in this agency, but it's even more so now. ”
Global CSO, London

“ We all know agencies that are very creative where the ECD is dictating everything, but very creative shops can have a strong planning culture if the head of planning is impressive. Planners often engender scepticism if they are mid-senior and still use techniques from 10 years before. ”
Director, Hong Kong

“ We're about to launch a set of values, covering everything from how we approach projects, to the type of strategic processes we use. You can't force a culture – it needs to evolve naturally. But company values can help, because they indicate the type of business you want to be. ”
Global CSO, London

“ We don't have a hierarchy. We take away all titles. And for everyone, the decisions they take in their work, they need to take the consequences of these decisions. They see it through, beginning to end – they don't pass it on. And that's the biggest challenge for our new starters: they are so used to being able to leave responsibility to others. So there's a period of panic. And, after that, they're either going to leave or stay! ”
(Nominal) Head of Planning, Gothenburg

How planners and creatives can work together



**Tom Morton, SVP, US Strategy,
R/GA**

What could be more planner-like than holding a chunky survey and feeling a creeping sense of doubt?

The good news from WARC's Future of Strategy survey is that planning is becoming a more important part of agency life: a bigger influence in two-thirds of agencies, and a bigger department in half of agencies.

And then comes the doubt. We

hold this bigger position, now what are we going to make of it? How are we going to parley our increasing presence into an increasing influence on creative output? Are the creatives even listening to us?

I'm enough of a nerd about this that, last year, I [interviewed 100 planning and creative directors](#) to understand how the two disciplines could work better together.

Planners see the issue in terms of relationships: they tend to think their influence should come from being friends with creatives. They talk about getting to know the creatives as people, kicking ideas around, and going for a beer together.

Even if the planners are buying, the creatives aren't drinking. Because, while planners want to be friends, creatives want to be inspired. Their biggest ask from planners is insights. When I asked creative directors what they most wanted from their planners, they spoke about "telling me something I never knew about the brand or the audience", giving a "unique take on the brand", "bringing facts and research into human

behaviour". In other words: insight.

This runs counter to how planners spend much of their time, wrangling decks and hauling their thinking around internal and client organisations. It also runs counter to how planning has evolved since its early days, from finding juicy truths about brands and their buyers, to guiding products and services through new media landscapes and shifting consumer expectations.

But it turns out that insight remains the most valuable commodity. Planners assume that creatives want well-articulated problem statements. They don't. They want insight-hunters, not provocateurs.

I see this in my own agency, R/GA. There's an urban myth about the misguided planner, gifted with a Nike project, who penned a (provocative) think-piece about how mankind's desire to run springs from our origins in the Rift Valley, or how cricket is a product of colonialisation and the spread of the railways. Instead, the smart ones dig for sharp new truths – what college athletes really worry about before back to school

season, for example, or [why Kyrie Irving moves differently](#) on the court. The insight hunters beat the provocateurs every time.

As agency output broadens into more systematic areas like design, innovation and UX, creatives need human truths to build and design around. As my CCO Chloe Gottlieb has said: "If you give a good creative a truth to work with, we can build anything." It's no coincidence that UX centres on the hunt for use cases, pain points, and unmet needs: human truth helps everyone understand how best to use technology to make a difference in the real world.

This recasts the value of a good planner. If insights are fresh truths, then we should always be searching for new ones, before our old ones go stale. We could be social listening, conducting ethnographic projects, or combing company data for hidden patterns. The emerging behaviour that we find is our most useful contribution to breakthrough output.

And if we set out to be useful, we'll end up being as important as we claim to be in the survey.

Why strategy teams should always sit together



Mark Tomblin, Chief Strategy Officer, Juniper Park \ TBWA

Over the course of my career I've seen pretty much all the various combinations of agency seating arrangements. And there have been a lot of them.

Departments by floor. Brand teams in 'hubs'. Everybody jumbled up. Completely open plan. Communal work benches. Hot desking. Lots of individual offices (though network finance mandates on 'packing rates'

mean that this is more and more rarely seen these days – which is probably a good thing, to be honest).

As a result, I am now convinced that the best way for planners to sit is as a group, together, separate from the other agency teams. This is for a number of reasons.

Planners tend to work alone

Planning can be quite a solitary activity – unlike creative people who work in teams and account people who normally (even now) come in a squad, most accounts only have one planner day to day. It is easy to feel a bit alone sometimes. Sitting apart from other planners can only increase this feeling of isolation.

Helping the flow of knowledge

Planners have an enormous amount to learn from each other, especially in these fast-changing times. Sitting as a group helps generate a flow of knowledge that quickly becomes natural and easy; this also helps to break down barriers between individual specialisations and levels of experience. It also increases the

power of the collective.

Encouraging risk-taking

In my view, the best planning comes from the confidence to have an opinion, to take risks, to suggest ideas and solutions that may at first seem to be on the wrong side of bonkers. Sitting with other planners, testing your ideas on them and talking them through these ideas informally, can encourage you to go live with them for real.

Helping conversations

This one is a bit of a cliché – but the hive mind is a thing. Even among a group of six or ten planners. Using Google is OK as a very simple research tool, but it's no substitute for asking direct questions to people with relevant experience. And asking these questions face to face is better than doing it online. Even with email, messaging and the rise of using collaborative tools like Trello, Slack or Facebook at work, nothing is quite as useful as sitting in close proximity to other people who do what you do, day in, day out.

Collaborative, not competitive

Planners don't suffer from the competitive issues that creatives can (understandably) sometimes face. By and large, we don't lose if we share our thinking. Plus, if planners were to be Myers-Briggsed – yes, I know that psychometrics experts ridicule the MBTI, but let's stick with it for now as it's so well-known – my guess would be that the vast majority of us would be classed as 'introverts'. Our egos are not as obviously on show, which means that collaboration and building on each others' ideas come more naturally to us.

I like to think of planning less as a department and more as a community. In my experience, planners thrive when they sit together. And when planners thrive, so does planning. And when planning thrives, so does the agency.

How strategists can challenge the status quo



Sue Unerman, Chief Transformation Officer, MediaCom

We don't have a central strategy team at MediaCom. Instead we have a Challenge and Inspire Department, affectionately known within the agency as "CID".

There's a reason for this: the risk of the strategist "going native" with their client.

In order to develop good strategy, it is very important to get really close to a client's business

problems, to get under the skin of their brand, and to get to know how they operate.

We think this is the job of the planning teams who work on the client's business day to day.

But, at the same time, as a strategist it is very important to maintain some distance from the client, get under the skin of anyone who might be a source of growth, and always be able to challenge existing ways of working.

If you stay too close, you cannot do this. You go native. And if you go native you cannot challenge as effectively, you are less able to identify sources of growth, and it is much harder to re-invent.

There are plenty of people at MediaCom who are responsible for the smooth running and forward progress of the accounts we work on. It's crucial that we focus on all the ways in which we can contribute to effectiveness day to day. In addition we encourage our CID team to disrupt the smooth running of the account to seek a strategic step change on behalf of clients.

To be ready for disruption before disruption arrives. To challenge the status quo. To inspire creativity. To leapfrog the crowd. To zig when the market zags. To seek growth ideas when others are cutting back.

Richard Rumelt says in *Good Strategy, Bad Strategy*: "An insightful reframing of a competitive situation can create whole new patterns of advantage and weakness. The most powerful strategies arise from such game-changing insights."

Get too close, go native, and those insights are very difficult to come by. Good strategy should consider the unexpected. If your focus as a strategist is on understanding the rules of the marketplace you're involved in, if you're so close to the action that you're part of the game, it is difficult to find the unexpected wins.

Even when you've built a game-changing strategy, you've barely begun the task of a strategist. The most important part of any strategy is the execution. In fact, as Mike Bracken puts it, "The strategy is

the execution". If you are too close to the people involved in the old ways of working, it can be hard to focus on sticking to the changes that might create disruption and, through that disruption, some real advantage.

So, don't get too close. Don't go native. Challenge the status quo.

How to set planners free



**Craig Adams, Strategy Director,
Naked Communications**

More than ever, agencies are expected to break new ground while using ever less money and time. We're in a bind, facing the choice of following agency process or trying something different.

Process doesn't always lead to progress. While process can be great when you already know what the solution needs to look like, what about when the brief is open?

A feeling of freedom is essential when solving these kinds of problems – that leave us unsure where to start and can never be solved with a single, simple solution. And freedom, in my experience, is best driven by two things: healthy scepticism and restless curiosity.

Process has a place, of course, but the magic happens when you free it up and allow your beliefs to shape it or break it at any given time. Everything communicates; See the bigger picture; All media is earned media; Challenge convention; Strategic creativity. Some of these beliefs are written on our walls, some aren't, but here are a couple of ways in which they are freeing up planning process at Naked.

Changing the brief

Clients are increasingly bringing briefs to the table where they aren't stipulating the answers. And open briefs thrive in an open process.

So in these circumstances we often break off the bottom half of the creative brief, and stop short of giving the creative teams a

reductionist proposition. Instead, we've turned to behavioural science. Using our behaviour change toolkit, we translate the client's challenge into a behavioural objective – turning a marketing problem into a people problem – and work collaboratively with the creatives from there. This also brings the creatives to the table sooner.

Design thinking

The design world continues to influence the way we approach solving problems and identifying opportunities with our clients. At Naked we've been experimenting with design thinking models and have found them to be very effective.

One useful model is [the "Double Diamond"](#). It places equal emphasis on the searching and selecting of problems and solutions. Whilst we set our stalls out as professional problem solvers, we can be guilty of selecting solutions based on unproven assumptions and 'gut feel'. But, using this model, we ensure we set aside time and money for executing low-cost experiments to

validate such assumptions.

Not only has the model helped us free up our processes, but it's allowed us to go to clients having validated both their problem and our solution. We find this approach more and more welcome in C-suites.

The marketing industry has taken on a lot of the rhetoric from the tech world about "failing fast". Whilst the sentiment is spot on, the emphasis is wrong. No client wants to buy failure. The emphasis should be on the product of fast failure, which is learning quickly.

What if we viewed strategy in less absolute terms, and more as an ongoing experiment? And what if we called out our assumptions, rather than disguise them, and designed experiments to validate them?

The more uncertain things get, the more certain I am that freedom in the planning function is essential. Freedom to use your scepticism and curiosity to develop zero-based strategy; starting with nothing but your belief in what great work looks like and a contemporary planning toolkit to build with.

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