How agencies use their tools

Planning and strategy as a discipline has become **more complex**. There's **more pressure on strategists** and the industry as a whole to focus on the **business impact of communications**. Strategists have a lot to do, a lot to learn.

Good agencies make sure their strategists have **access to the right tools**. Great agencies **teach strategists how to use them** well, in order to support the needs of the business.

Internal intelligence departments and their research partners should **know what agency teams need**, before they need it.

Being able to turn **information overwhelm** into project specific, robust, actionable intelligence not only benefits strategists but also supports new business, creative, and account teams.

There are so many tools to choose from —including premium databases and freely available sources— intelligence providers should be seen as **proactive research partners**.

The overall goal: to meet client needs proactively with **credibility, simplicity, and relevance** to **maintain WARC's position as a valuable resource** for the advertising industry and beyond.

1. Role of a strategist

There are many types of planners/strategists —it's a broad discipline. The Account Planning Group (APG) lists 11 types; these don't match all the various job titles on LinkedIn.

"The planning world is being **constantly disrupted** and is becoming **increasingly fragmented**. The **proliferation of titles and roles** and **different applications of strategic thinking** force us to **pay attention to what this means for individual strategists** and how we should arm up to deal with change and continue to thrive as a discipline."

Definition of strategy is endlessly discussed

But what exactly do they do?

"Planning can be a ridiculously intimidating job."
—Sarah Newman, APG Director

Brand Planning can be thought of as a **series of steps** (from initial information gathering to strategic development, creative brief, execution, and evaluation).

Planning as it was had to fight to prove its value to clients, & **become more strategic (including the name).**

Some core skills:

- Define a **brand's market**
- Assess the **competition**
- Determine who the **target audience** is, how and why it chooses the products it does
- Develop the strategy and **positioning**
- Know what **messages**/media will attract and appeal to that specific target audience now and into the future
- **Set goals** for communications
- Prove it was all **effective and made money** for the client

Planning Roles: Prepared May 16 2006

Objectives: Define the roles, skills and experience required as a: Planning Partner, Senior Planner, Planner, Junior Planner

Defining the roles: The primary role of planning is to be the brand guardian and voice of the consumer and the heart of the communications planning process. It's our job to be the driving force behind developing powerful brand and communications ideas.

Above and beyond this, there are several factors to consider when defining the roles of each planning level:

1. The planning department is required to fulfil a large and varied number of tasks:
   - Tasks performed on client business (i.e brand planning, communications planning),
   - Tasks performed for the agency, not on existing client business (e.g pitches, getting involved in agency initiatives like Brand Elevation),
   - Tasks performed externally/publicly (e.g thinkpieces, seminars).
   -

To fulfil these tasks the planning department needs to work as team. Every single member of the department contributes to the overall fulfilment of these tasks by knowing what their specific role is and enabling and acknowledging the roles of fellow planners.
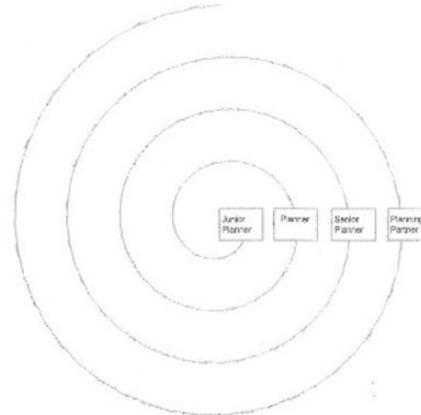
Fun fact: Traditionally, Junior planners begin their careers in Information Departments

The discipline covers a broad spectrum of ever-expanding skills

- **Upstream business problems**
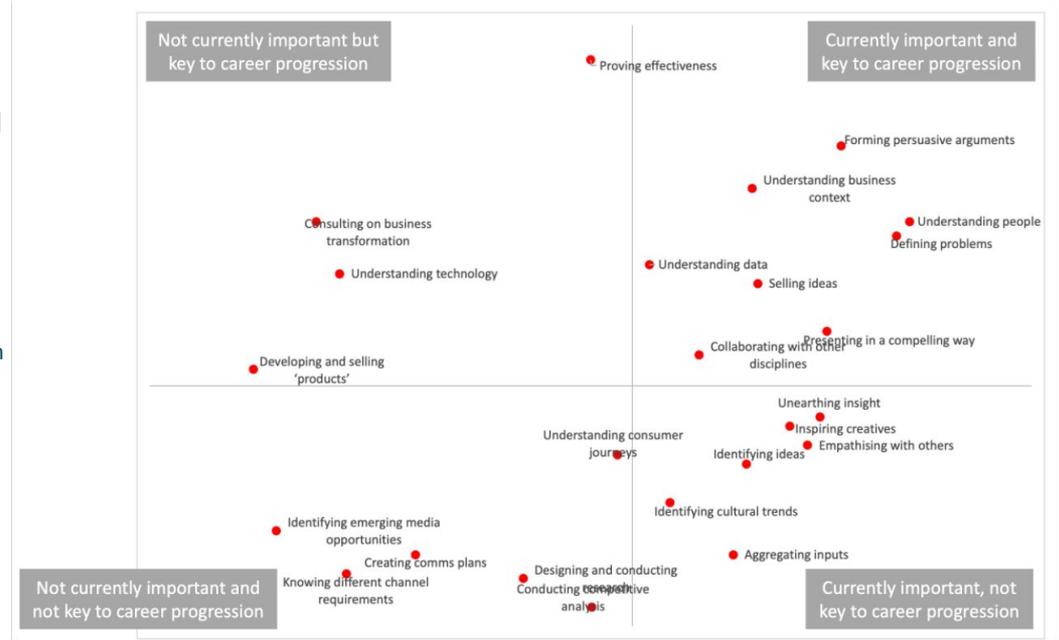- **Understand people**
- **Deliver upstream strategy**

👉 **Have grown up conversations with clients**

"Our business, like any other, depends on **talent that can inspire better ideas and business results**"
  —Mike Sheldon, CEO Deutsch NA

To have confident conversations with clients, the skills needed to get ahead are all about business.

Planners recognize that they need to **complement their core craft skills with more upstream business understanding** so they can become more senior consultants to clients.

Not currently important but key to career progression

Currently important and key to career progression

- Proving effectiveness
- Forming persuasive arguments
- Understanding business context
- Understanding people
- Consulting on business transformation
- Defining problems
- Understanding data
- Understanding technology
- Selling ideas
- Presenting in a compelling way
- Developing and selling 'products'
- Collaborating with other disciplines
- Unearthing insight
- Inspiring creatives
- Understanding consumer journeys
- Empathising with others
- Identifying ideas
- Identifying cultural trends
- Identifying emerging media opportunities
- Creating comms plans
- Knowing different channel requirements
- Designing and conducting research
- Conducting competitive analysis
- Aggregating inputs

Not currently important and not key to career progression

Currently important, not key to career progression

2. Importance of information

Because it's a strategist's job to **know their stuff,** agencies need to invest in research. This includes **investing in people to conduct the research** as much as having the right tools.

"From the moment you arrive on an account, you should be the **gatekeeper and fount of insight and information**. Without the data and reading to back it up, your 'insights' are just **your opinions, and therefore open to debate**. Backed up by reading and actual information, they become much harder to ignore. Part of the **growth curve of a planner is learning which data to use** and which to ignore."

Investing in business intelligence leads to better work

"**Great planning depends on great business intelligence** and an understanding of **how that information can be used** in the service of great creative – and effective – campaigns."
—*Colin Mitchell, Ogilvy Worldwide Head of Planning*

Research/Intelligence/ Information Departments' role is to evaluate information from a variety of sources and make this available to the Group.

What they do:

- Support every new business pitch
- Investigate client business problems
- Use secondary research to define and analyze consumer target groups
- Analyze competitive creative and business strategies
- Support agency award season, provide evidence and data to create compelling effectiveness cases
- Become experts in advertising theory
- Provide training, coaching and advisory
- Bigger picture: current business climate, economic issues, cultural and consumer trends
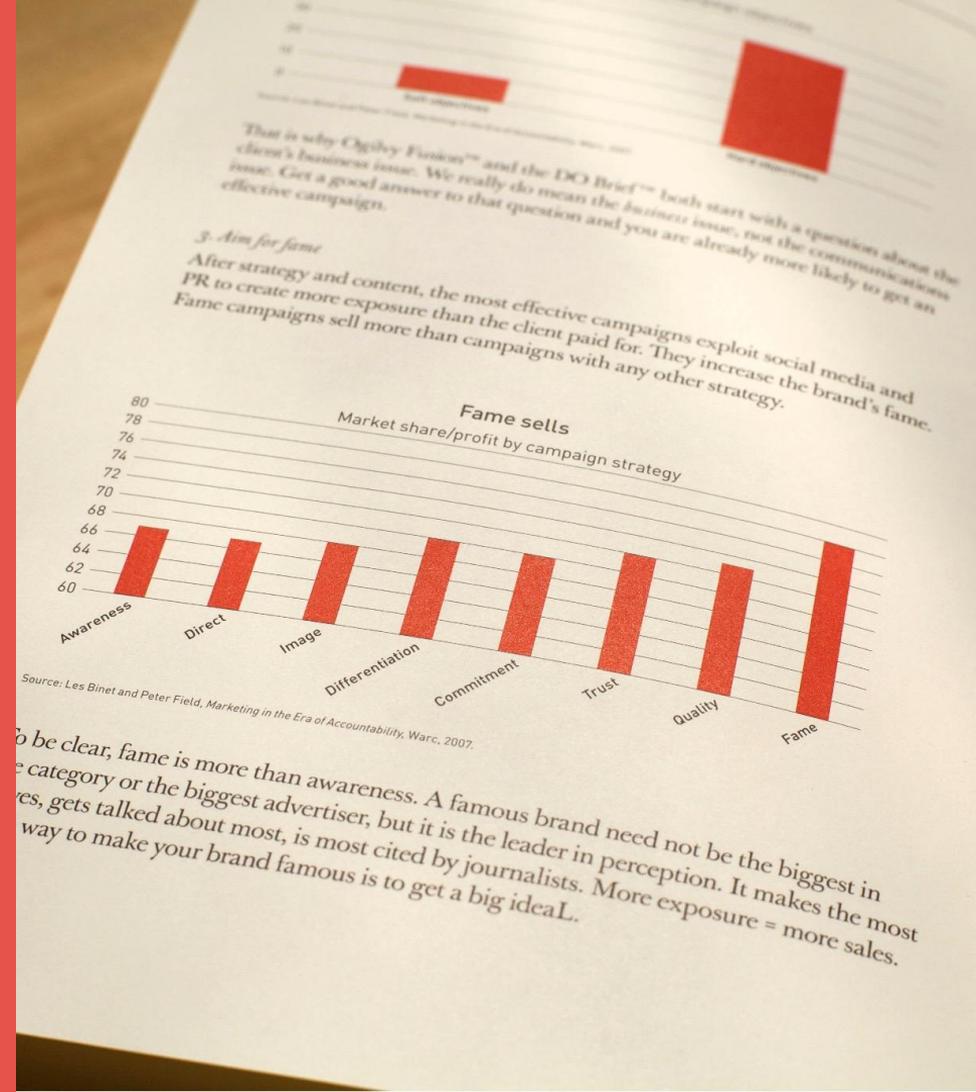
Agencies need a lot of tools (+ reassure clients)

SECRET

Stay ahead of the game.

Strategists need to do their homework

"**Do your homework…It's amazing how few people do this, but it's absolutely necessary. A lawyer has to know case law, a doctor has to know medical history, a scientist has to know previous experiments. That's what being qualified means**".
—*Tim Broadbent, Ogilvy Head of Effectiveness*

Advice: start homework as soon as they're assigned to an account

• Subscribe to WARC newsletter + newsfeed by client brand

• Download Mintel or Euromonitor on category (+ sign up for updates)

• Run MRI (TGI) demographic, psychographic profile of target consumers

• Read winning Effie papers for client and category

• Download company profiles/annual reports

• Find out what their client's reading (NYT? WSJ? Trade press?), set up news alerts

• Attend lunch and learns with guest speakers

• Use the intranet/Intelligence Newsletters

• Learn how to use DIY resources

• If they still have questions, they send us a brief

3. How agencies use research

It's not just the role of strategy to stay informed on the client's business and competitors. Secondary research is used across the business and on every account.

"I once asked Sir Hugh Rigby, Surgeon to King George V, 'What makes a great surgeon?' Sir Hugh replied, 'What distinguishes the great surgeon is that he knows more than other surgeons'".

—David Ogilvy

In advertising, there's no such thing as a tough or dumb question

"What does the American Dream look like today?"
Head of Planning

"How do we grow brands in a commoditized market?"
New Business

What are the effects of maternal touch on babies?
Huggies

"How do we create brand value?"
New Business

What do people indulge on outside of the beverage and food category?
Account Director

"Where/when/why brands might use a creative solution like testimonials."
Brand Strategist

How do expatriates figure out their medical care?
American Hospital of Paris

What impact does using characters have on brands
Anthem

How do we justify investment in advertising
Avvo

What does "success" look like for millennials today
Sprint

How can we express metaphorical hunger?
KFC

How do people feel about their careers in the current economy?
Glassdoor

How many messages are too many for consumers
VW

In a pitch situation we get asked for everything

"We're pitching for Philips and need to know everything about their business, the shaving market, what Gillette are doing, male grooming trends and oh, where do they buy their razors?"

A typical framework is the 5 C's

Company

How has the company been doing financially? Have there been any major changes in company structure or leadership recently? What is the client looking for, really?

Category

How is the category defined? What are the major trends in the category?

What interesting things are competitors doing in the category?

Competition

Who are key competitors?

What are the competitors' strategies, both business and advertising? Who are the competitors targeting?

Consumer

Who is buying the brand? What are consumers looking for in this this product or brand? How do consumers feel about the brand and product? How do buyers of your brand differ from your competitors'?

Channels

Where is the product sold? How do people find out about the product or brand? What are the trends in the product's sales channels?

Break it down: Philips

Company

How is Philips currently doing financially?

Where does the leadership see the company going and do analysts agree?

Category

What sort of changes are occurring in the men's grooming market?

Who are the key players?

What are the key narratives in the space?

Competition

Who are Philips' competitors and what are they messaging?

Who is winning in the category and why?

Consumer

Who is the Philips consumer?

How are men's attitudes and behaviors about grooming changing?

Channels

Where do men purchase their grooming products?

What are the trends in retail or online sales?

Resources and findings: Philips

Company

Using broker reports, earnings calls and trade press coverage, we were able to determine what made the CEO lose sleep at night and what the market thinks the obstacles are in Personal care. *Philips wasn't just competing against other electric shaver companies but an entire personal grooming market.*

Category

Mintel & Euromonitor cover the category. We were able to learn that younger men don't prioritize grooming and traditional razor sales were on a steep decline. *The team realized that flexible/creative grooming might be a strategy to pursue; clean shaven faces were out of vogue.*

Competition

We analyzed competitive creative and media spend. Mintel, Euromonitor & MarketLine gave us a view of the top competitors. *Gillette is the key competitor and they use sexuality, strength to appeal to younger males (and their girlfriends?) while Philips focused on technology & functionality.*

Consumer

We used MRI to investigate the Philips user's demographics, attitudes, shopping habits and grooming behavior. *It turns out they are older, don't groom that often & are quite different from the 18-35 year old ideal target.*

Channels

Using Mintel, MRI and retail trade press, we found out how often they purchase razors and from where. *Issues with visibility and sales team performance could have an impact on overall sales.*

Challenging strategies

"We've settled on the idea of 'Fueling Progress' for [bank client]. I am interested in looking into aspects of, definitions of and attitudes to progress around the globe."

Methodology:

• Expanded definition of "progress," looking at trends around happiness, success, wealth and future goal setting

• Identified a common theme that pure wealth as the measure of progress is giving way to a softer, more-society focused view and that emerging markets and developed markets have distinctly different views of progress

Sources used:

• Wellness indices: OECD, Gross National Happiness, Earth Institute
• Consumer trends surveys/databases: Kantar Futures, Roper, Pew
• Business analysts: McKinsey, PWC, Economist Intelligence Unit

Results:

• Team refocused on the cultural tension "new face of ambition"

Challenging clients

"Our client has asked us for a POV on adding a layer of corporate adverting at the holding company level to support their various business units. Do we have evidence of its impact on share price and is their an optimal spend level as a percentage of their total advertising spend"

Methodology:

• Compiled advertising theory to illustrate universal understanding of effects of advertising

• Supplemented theory with case studies proving the effect of corporate advertising in real world examples. Focused examples on telecoms, but also pulled examples from other categories to show the effect of advertising is not category specific

Sources used:

• Advertising theory databases: WARC, ARF, academic journals
• Brand valuation companies' white papers: Interbrand
• Case studies: WARC

Results:

"This will help Ogilvy Canada give really smart fact-based advice to their big client - and hopefully land an incremental assignment."
    —Brian Fetherstonhaugh, Chairman & CEO OgilvyOne

4. Awards Season

Writing award papers are a significant time investment for serious agencies with an effectiveness culture built in. Strategists may need to be encouraged to submit but if the directive comes from up top, it's all hands on board.

The most Effective agencies know results and data matter

"The best way to learn how to write a winning entry is to read those of previous winners. Our job is to know what other campaigns have achieved and how their success was evaluated.

Information is critical to build a compelling Effie case. Even if you can't get data from the client, use Mintel, read the financial pages, analyst reports, etc. No business data, no case."

—Tim Broadbent, Head of Effectiveness

Key Tips:

• Read the most recent winning Effies in your category

• Gather data from both client (takes persuasion) and 3rd party sources

• Start with the business results: revenue, profit margin, sales instead of awareness and consideration

• Think about other creative ways to strengthen your point and add context/drama to your case

• Highlight the elements that worked against you

• Ultimately, try to support everything you are saying with research: doesn't have to be a stat, could be a fact or a quote to build drama

The Ogilvy & Mather guide to effectiveness

Tim Broadbent
Worldwide Effectiveness Director

Tell the story with killer facts

👉 **Break question down into the parts of the story they want to tell.**

Find the facts that will support each part of the story.

MINTEL

EUROMONITOR INTERNATIONAL

STYLUS

MRI | SIMMONS

"We just got our first round of feedback from the Effie committee and were hoping maybe you could help us to fill in some gaps. We're looking for: Electric shaving/grooming category growth/decline over the past 10 years, average age of electric shaving/grooming versus manual shaving/grooming category users over past 10 years and Philips Norelco versus Gillette total shaving category market share. We also have some great distribution results from the client, and the committee was asking if we could spice it up a bit with some fun facts."

Brainstorm facts to bring the story to life

"Do you have any statistics around how people in this country are rejecting aging? For example, 85% of 70-year-olds say they wish they could be 50 again.

What is the size of the female population in the US over the age of 18? Can we quantify what 1 in 3 women over 18 would equal to?

What year did Depend invent the category? Has Depend lost category leadership?

Do you have any numbers on the femcare category for Kotex?"

👉 We looked for facts to add context (and drama) to the adult care and femcare categories.

Prevalence of menopause, menstruation, bladder control/incontinence from the CDC.

Pulled demographic, category, market/brand share and size from Mintel, Euromonitor.

Used government statistics & MRI to calculate size of population and tell the demographic story.

Plus client data at the last minute...

Telling the Depend story

☞ **Depend: The Great American Try On, Effie Worldwide:**
   Gold, North America Effies 2013

"Today, one out of every nine Americans is over 65, and, for the next 19 years, nearly 30,000 boomers will become seniors every single day (US Census Bureau). That's a lot of people.

An older population means more incontinence. Today, 25 million Americans live with a bladder control problem, and this number is growing. Euromonitor estimates annual sales in the adult care category were $1.32 billion in 2011, up from $557 million in 1997, an increase of 137 percent creating a huge opportunity for the Depend brand to grow… "

Telling the Kotex story

👉 **Kotex: Break Up, Effie Worldwide: Bronze, North America Effies 2013**

The brand faced several circumstances that made growth difficult:

1) <u>Economics were against us:</u> According to Mintel, "sales of sanitary protection and feminine hygiene products have reached their lowest point since the recession began"

2) <u>Demographics were against us:</u> Boomers are entering menopause and leaving the category faster than teens are coming into it.

3) <u>Increases in contraception worked against us:</u> The number of contraceptive prescriptions dispensed to the pediatric population was 93% higher in 2010 than in 2002 (Pediatrics Magazine). As contraception increases, there is additional pressure put on the category.

Support key insights with facts and data

SAP

"We're trying to make the argument that SAP has been able to survive and sustain during times of big boom and bust, while other tech companies failed. Do you have any data points or quotes that might support this key insight? For data points, perhaps something like the number of tech brands that have gone bust? For quotes, perhaps something around why it's so hard to sustain/survive/innovate as a tech brand and what it takes to defy the boom-and-bust phenomena?"

👉 Looked for facts about the technology industry:

Data points and quotes to support key insight that during the last decade in which hundreds of tech companies have come and gone, SAP has sustained its success.

SAP: Building An Enduring Brand on the IT Roller Coaster

Software is a tough and volatile industry. It's crowded, with a low cost of entry and constant stream of new technologies. The IT sector has the number one "death" rate of all industries[1] and software companies have a particularly high rate of failure– twice as much as hardware and three times greater than pharmaceuticals.[2] So, succeeding is not easy – every company needs to innovate constantly to meet market needs and at the same time fend off emerging competition.

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[1] Bureau of Labor Statistics Labor Review Report 2008
[2] *"Why do software firms fail"*, Information systems research report 9/2010

What began as an ad tagline is now SAP's corporate vision

"The Best-Run Companies Run SAP" has become the driving vision behind everything SAP does, from business cards to speeches. It has helped SAP thrive in a difficult decade.

SAP was listed on the NYSE in August 1998; since then 121 other Information Technology companies have been de-listed.[4] 8 of the 19 dotcom brands that advertised on the 2000 Superbowl are now out of business, yet SAP has become one of the most

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[4] Global Financial Data: Delisted Equities

Telling the SAP sustained success story

Methodology:

• Compiled data points and quotes to support the team's key insight that during the last decade in which hundreds of tech companies have come and gone, SAP has sustained its success.
• Looked for data points on numbers of tech brands that went bust and quotes discussing what it takes to sustain success in this market.

Sources used:

• Global Financial database (stock market) to show how many tech companies had been delisted in the past 15 years to show how SAP had survived when others had failed
• Government and industry press for qualitative proof that the IT category is extremely volatile

Results:

• SAP was short-listed for the Sustained Success category

"Just wanted to properly thank you for a job well done. You over delivered on the information you pulled for the SAP Effies entry and it was very appreciated! It was really great, clear and results oriented. You are training your team well."

— SAP Team

Any questions?

Thank you!

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About

MADONNA DEVERSON

Originally from Australia but hadn't lived there for many years (until COVID)

Began agency life at Leo Burnett London and lead the research unit Leo IQ for 7 years

Won the green card lottery and spent four years in news research at Fox News and The New York Times

Joined Ogilvy NY as Head of Intelligence (North America & Worldwide)

Left for LA to join Deutsch as Head of Brand Intelligence

Spent time freelancing as a brand strategist and content writer

Most recently a Senior Strategist for a small healthcare marketing agency

Involved in industry and training; was an awards judge for the Advertising Research Foundation & Adjunct Professor of Brand Experience at City College of New York

Have made sure every agency or university I've worked in subscribed to WARC