

# **THE SUREST FORMULA FOR GREATER ADVERTISING ROI**

**A true saga of the origins of account planning in Australia and the experiences and motivations which led to its invention in 1965 and early implementation in 1966 - including famous campaign case studies and surprises**

**Industry leaders say:**

**"Before his time."**

**"A 'must' for marketers."**

**"Riveting reading! What a story!"**

**"Fascinating expose."**

**PIONEERING THE ACCOUNT PLANNING ROLE IN THE ASIA-PACIFIC REGION  
FOREWORDS**

**BRUCE McDONALD**

**FORMER MANAGING DIRECTOR - THOMPSON ANSELL BLUNDEN & GREY ADVERTISING  
FORMER FEDERAL PRESIDENT - ADVERTISING FEDERATION OF AUSTRALIA**

*“A really fascinating expose of the origins of account planning in the '60s and '70s. I was sorry to lose David from Thompson Ansell Blunden in 1966. He clearly showed his special and early abilities and understanding of strategic planning in everything he did then and subsequently.”*

**WARWICK HOARE**  
CEO, ATR - SYDNEY

*“David Brent is one of those people who are described as "before their time". When I first met him, [in 1972] he had dragged a couple of tough guys in the ad business into the era of Advertising Planning, a move which saw them make private fortunes and industry reputations as their agency grew in leaps and bounds.*

*Advertising research in those days had a poor reputation - creatives knew instinctively that there was no known way to forecast behaviour on the basis of a single exposure. You could sort out the disasters but the potential for babies with bathwater was enormous. Accordingly they assembled their arguments against research and attacked with vehemence any threat to their creative wisdom.*

*Imagine my surprise when I met David solidly ensconced in the midst of the enemy and having them vigorously support his recommendations for research.*

*How did he do it? To this day I am not sure, but reading his reflections on his career will certainly give you some insights.”*

**JOHN PENN**  
FORMER GENERAL MANAGER, EDGELL CANNED FOOD - SYDNEY

*“As someone who was involved in marketing in the 1970s [at Edgell to be specific], it has been quite a nostalgic trip for me to read David Brent's candid account of the contribution made by planning on the great advertising campaigns of the time.*

*Marketers now widely accept that the combination of informed and disciplined planning with outstanding creative produces the best results in advertising communication, and in ideal circumstances the two feed off each other. David's success has been to realize the strength of this combination and tirelessly promote and practice it over the years.*

*This article of David's is a "must read" for anyone connected with marketing today. Experience is a great teacher!”*

**COMMENT BY DR MAX SUTHERLAND**  
AUTHOR: "ADVERTISING & THE MIND OF THE CONSUMER".

*“I found this riveting reading! I had NO IDEA that research and planning had REALLY managed to work that closely with the creatives - and so early in the piece. What a story!”*

## **INDEX**

## **ADVERTISING CASE HISTORIES – WITH THE AD AGENCY PLANNING ROLE**

1. Introduction
2. Background
3. Intelligence – The Key to Marketing Success
4. Personal Review and Future Direction
5. The First Ad Agency Planning Role in Australia - January 1966
6. Pioneering Consumer Market Research at Reckitt & Colman
7. Phase 2 - The Planning Role In An Australian Ad Agency - 1969
8. The First Revelation for Management - Planning Changes The Status Quo
9. Attitudes Changing - The Planning Concept
10. Re-Gearing the Agency to Win Blue Chip Business - Amoco
11. Amoco - Laying the Foundations
12. Amoco - Strategic Direction
13. Amoco - Creative Breakthrough and New Positioning
14. Amoco - Continued Planning
15. Edgell Potato Whip - Launch of an Instant Mashed Potato
16. Harris Coffee & Tea - Centripetal Marketing
17. Unselling the Brand - A Beer Case Study
18. DIFFICULTIES AT TIMES
19. Failed Food Product Launch
22. Cosmetic Range - Honest Counsel to the Client
23. Strength of the Marketing and Research Specialist in the Agency
24. Planning Into The Future - Later Years
20. Difficult Client Management
21. Royal Crown Cola - Success and Tragedy
25. IN SUMMATION
26. Myopia in the Industry
27. Ad Agency Failings
28. Account Planning - Most Innovative and Important Change
29. Lack of High Calibre Planning
30. Planning Learns from Great Creatives
31. Planning - A New Business Boon
32. Planning Examples
33. Top Creatives Strongly Endorse The Role Of The Planner
34. Planning - The Long-Term Answer
35. Skilled Intelligence and Hard Work Up front - The Key To Success

#### **CLIENTS' ENDORSEMENTS OF THE ACCOUNT PLANNING ROLE**

#### **AUTHOR'S BACKGROUND AND EXPERIENCES**

## **ADVERTISING CASE HISTORIES - TOUGH PROBLEMS AND STARTLING SOLUTIONS WITH THE AD AGENCY PLANNING ROLE.**

The ad agency account planning role in the Asia-Pacific region.

How the ad agency planning role was independently conceived and pioneered in Australia

## **IMPORTANT NOTES FOR THE READER**

DID PLANNING MAKE A DIFFERENCE? For authenticity of the outcome and success of the revolutionary new planning role **the endorsements of clients** are provided as the final arbiters of results from this new experience. Did it make a difference? If the reader is interested these are included at the end.

If the reader is further interested some background on **the early experiences and motivations** for the innovative planning role follows the section of client endorsements at the end.

### **1. Introduction**

This story is largely biographical. It recounts personal experiences from life and work and narrates what was done and observed by the author, David Brent. From a professional point-of-view the intention is to demonstrate that the account planning role in the ad agency was invented in Australia in 1965 and commenced in 1966. In the course of telling the story, David Brent sometimes reveals past successes and past failures by ad agencies. In doing so the identities of ad agencies which failed at that time are not mentioned. This is because there is no reason why the people who now run these agencies should be associated with the failures of people who ran their agencies over a quarter of a century ago. Times have changed and management philosophies have changed. The era of the '60s and '70s is long gone and much has since been learned from past mistakes. David Brent's story is about the turmoil and upsets and reactions caused by his determination to bring a radical, fresh and more effective new way of producing advertising that works better as well as the successes achieved along the way.

At the suggestion of his colleague, John Clark, former senior marketing executive with the Unilever Group in Australia, the UK and Belgium, extracts from the testimonials of clients are included for added authenticity in relating the story of an entirely new role and discipline in the ad agency. Also because the final judges of good work by people in any agency are the clients and in this case particularly, how they viewed the style of performance of the first pioneer of the planning role. These clients' views of the revolutionary new planning role are included at the end in a special section – if the reader is interested.

The story is told from memory and records available and no responsibility is taken for any minor errors or omissions. Names of persons, clients and agency people, are not mentioned because it is felt by both David Brent and John Clark that it helps to maintain an impersonal view of events and facts and to avoid possible misunderstandings.

All the material on this web-site has been prepared in order to promote the benefits of the ad agency account planning role to clients and ad agencies. If professional advice or other expert assistance is required, the services of a competent professional person should be sought.

### **2. Background**

There is a universal view that the specialist planning role in ad agencies was initiated and adopted among some forward-thinking ad agencies in the UK in the mid - 1960s, and that planning didn't start to get off the ground in Australia until the early 1980s when a few ad agencies followed the trend in the UK and adopted the role, gaining favorable publicity for their efforts.

It is certainly true that the role of the planner did evolve in the UK in the mid 1960s but it is equally true that the role of the planner was conceived in 1965 and commenced in 1966 in Australia, and by 1969 was further implemented at a small Aussie ad agency with well-recorded case histories and a highly qualified pioneer incumbent. The key difference between the UK and Australia was that while in the UK the concept received early recognition and adoption by ad agencies and thrived and developed, in Australia there was a failure to recognize and capitalize on the marked contribution that planning was capable of making to the development of highly effective campaigns, a more efficient and profitable agency operation and a stronger partnership relationship and tenure of business from satisfied clients.

There appeared to be almost an attitude among a few of, "Let's not make too big a matter about this planning thing. It might detract from the popular perception we enjoy for having the special talents for being intuitive, creative and clever," which might not seem to have been very clever when major clients were expressing concern for the quality of their advertising and demanding more accountability and a greater chance of success for major campaigns and projects.

Certainly, in Australia the specialist planning role floundered and became controversial with high profile executives in big multi-national agencies pooh-pooing the planning role as a passing fad of no real substance or importance. One has to wonder what was it that allowed the important innovation of account planning to thrive and prosper in the UK and yet after a vigorous and highly successful introduction in Australia most Australian agencies hum'd and haa'd and fiddled about for so long.

Now it is quite clear that the specialist planning role, properly staffed, in the ad agency, is **the most important innovation in the ad industry in the past half century**. When David Brent first worked in Australia in the '60s there appeared to be signs of an anti-intellectual bias in some quarters of the ad industry, and in following years he occasionally heard comment on this phobia. Was this a factor, or was it simply fear of the unknown and the untried?

### **3. Intelligence - The Key to Marketing Success**

After earlier years as a platoon commander in the defense of NATO and then as an assistant superintendent in Malaya's para-military police force during the 'Emergency' – the war against communism, David Brent entered commerce in Singapore in market research and then in advertising as an account service executive and creative writer with the region's second largest ad agency. Following an interesting time in advertising he came to Sydney, Australia in 1961 and after a year or so in account service, creative writing and media management with a small ad agency, he joined the Unilever group of companies specializing in market research. As part of his induction he completed a residential month-long course on marketing and advertising and for about two months or so was periodically attached to the various marketing companies in order to achieve an insight into the Unilever way of doing things. He was extremely impressed by the enlightened intelligence-based

approach to marketing practiced by management at all levels, and benefited enormously from learning Unilever's very professional approach to marketing and the experience of working with Unilever's many successful brands.

Particularly, there was great value from working as part of the marketing team with the brand managers and the ad agency people, especially in developing and testing concepts, advertisements, TVCs and working with tracking research to evaluate marketing effort and campaigns. Much of this involved being immersed in the minds and habits of consumers, mainly housewives and women generally, the main customers of Unilever's many brands, in all the main cities. Whether it was the laundry, ironing, cleaning, bathing/showering, preparing meals and so on and so on across the spectrum of household activities, the unending flow of quantitative and qualitative information on usage, attitudes and motivations and which brands were succeeding and which were failing, and why, was the life blood of intelligence which increased Unilever's success rate in its battle with its competitors.

Familiarity with the various techniques of advertising research - ASI, Schwerin and Unilever's own techniques and many case histories for all the techniques was an invaluable experience. It was a revelation of the degree of error - strategy or execution - in some ad campaigns and the waste of media money and effect on brands' fortunes. At this time the Unilever companies were light years ahead of most other main companies in the use of sophisticated marketing techniques and the thorough use of valuable on-going consumer research. All the seeds for realizing the scope for valuable application of methods and techniques to help the creation of more effective advertising with less time, effort and cost [getting it right the first time] were sown then and added to David's prior experience of making sure that the intelligence is sound and accurate before any major operations.

#### **4. Personal Review and Future Direction**

At this point in his career David had undergone two valuable experiences:

- combat intelligence against a resourceful and determined enemy resulting in victory
- valuable experience working with an extremely professional company and employing marketing skills and many sophisticated techniques so that main marketing decisions were based on sound intelligence and analysis and advertising decisions were similarly based on on-going consumer research at all critical stages - before ,during and after campaigns.

All these years had reinforced the irrefutably sound principles of thorough planning, preparation and comprehension and evaluation of true facts as opposed to reliance largely on hypothesis, conjecture and intuition. Good intelligence and good intuitive creativity working together.

Analogies are sometimes useful in helping to clarify the reasoning for new ideas. Perhaps the following will help to explain how things occurred in David's mind through various life and career experiences and how these influenced him to come to the conclusion that a specialist planning function in an ad agency would work well.

#### **The Army**

As a young platoon commander in Trieste in the defence of NATO from 1949 to 1951 he was on a steep learning curve. This was a 'knife-edge' situation as Yugoslavia threatened to invade the UN free territory of Trieste and NATO forces had to do everything possible in terms of activity and presence to discourage them. Apparently the NATO forces succeeded. Part of his work and experience was to understand the role of the Battalion Intelligence Officer [IO] and to obtain a clear grasp of the importance and ramifications of good intelligence and how vital it is to win battles and achieve victory. The IO and his section worked closely with all units in the battalion.

### **The Para-Military Police in Counter-Insurgency**

During the 1948 - 1960 Emergency, the war against the communists in Malaya whose objective was to take over Malaya and Singapore, David served as an assistant superintendent of police [ASP] commanding numerous large districts in the country. He was also trained [via standard British Intelligence methods adapted to local conditions] and operated as a specialist intelligence officer. The objective was two-fold. To gain critical intelligence of the communist terrorist organization and their intentions at all levels in the jungles of Malaya and also, to penetrate, subvert and destroy the Min Yuen, the spy network of the Malayan Communist Party in their clandestine cells throughout Malaya whose role it was to channel intelligence, supplies and new recruits to the units in the jungles and to engage in espionage, sabotage, extortion and assassinations. The police intelligence specialist and the police commander and local military commander worked very closely together to defeat the enemy.

### **Unilever**

When he worked in market research at Unilever in Sydney, the research client contact executive worked closely with the marketing people in the different companies keeping them advised of developments in the market place and recommending ways to obtain the best intelligence on market problem situations to help find the best solutions. Again, the valuable continuity of the intelligence specialist working closely with the front line marketers. Later, as the head of market research and intelligence at Reckitt & Colman in Sydney, his close work with the marketing people was the same.

### **Advertising**

David's experience with and observation of advertising people generally at that time was that they tended to lack sufficient practical marketing orientation and analytical objectivity in planning. Among some there appeared to be signs of anti-intellectual bias and in general there tended to be an entrenched dedication to execution rather than strategy. There appeared to be a very logical and vital need for the account people in the agency to have an intelligence specialist working closely with them. This specialist would have the qualifications, skills and the time to construct an accurate picture of the market, the consumer target audience and all other vital information to help make campaign planning more informed, more accurate, more effective - with fewer mistakes, less cost and greater success for clients. The onerous responsibilities of the account service people did not permit them to have the time to do all this, even if they had the inclination or the qualifications. And politics and expediency were often barriers to frank and truthful opinions. Hence his introduction of the new role of the person in the ad agency who was 'marketing' & 'research' & 'planning' and finally became known as the 'account planner' or sometimes the 'strategy planner'.

## **5. The First Ad Agency Planning Role in Australia - January 1966**

At the end of 1965 David decided to make a career move to take his rare experience to an ad agency and develop a strategic/planning role. He spoke with a few big agencies in Sydney but they couldn't grasp what he was talking about. They thought that what he proposed was unnecessary and over-kill. They thought they knew it all intuitively anyhow! He then spoke with the agency chief of Thompson Ansell Blunden, a medium-small ad agency. They discussed the role and how it could work to develop more effective advertising and better coordinated work by the agency team. The agency chief was a person of some intelligence and vision and was enthusiastic when the modus operandi and the types of results were explained to him. David joined the agency as marketing and research manager in January 1966. The new role got off to a good start and was successful with training for the account service people, good communication with the creatives and preparation of agency briefs and creative briefs. Sadly, however, there were adversarial elements in the agency ownership which were not conducive to the role proceeding smoothly and so some 10 months later he left to join the very diversified Reckitt & Colman group of companies to establish their first formal consumer market research department in Australia.

So the first planning role in an ad agency was in 1966. But without maintaining continuity due to political resistance. However, the seeds were sown in the agency after demonstrating some basic methods and techniques and clarifying the role to the agency people. When a breakfast cereal TVC was tested and clearly shown to have failed in communicating a key benefit [due mainly to the voice over and the visual not synchronizing] it created considerable surprise. There were other revelations of mistakes, too, by the agency and among clients which began to raise the suspicion that intuition alone may not have been quite as effective as originally believed and that there was a vital role for planning and research to help guide the way.

David's personal assistant had also been an interviewer with a UK research company. This was why she was hired, and this was useful for low-cost/effective simple research such as pack/label testing. They would also carry out TVC ad tests with a 16mm projector and screen in homes. Possibly the first mobile in-home TVC testing in Australia. Other TVC tests were carried out in the agency TV viewing room with a back-projected TV screen and respondents recruited off the adjacent shopping area. After David left, the agency later entered a merger and became Grey Advertising which in time opened up a move to a more enlightened, marketing-oriented approach to campaign development. He had to say that a few months later, after the agency became Grey Advertising, he had a slight twinge of regret that maybe he had reacted too hastily in leaving TAB as the new structure removed the main opposition to the planning role. But the decision had been made! Strangely, during his first week at Reckitt & Colman he was mildly surprised to receive a phone call from a senior executive at the agency who had been instructed by the agency chief to call him and apologize for his adversarial and obstructive behavior during David's tenure at the agency. David accepted his apology.

## **6. Pioneering Consumer Market Research at Reckitt & Colman**

At Reckitt & Colman the scope was enormous for a huge change in marketing philosophy and an enormous research work-load with the many divisions and brands where little or no consumer research had been carried out in the past and brand managers were 'flying blind' most of the time. The market



research department was staffed up, a field team was recruited, test-rooms were established in a high pedestrian traffic suburb and an on-going program of testing and development was commenced together with many qualitative and quantitative market studies. It was a time for re-thinking for many brand managers who had been battling along for years in the belief that all was well with their brands.

When cold, hard facts emerged for some brands with low scores for home stocking, purchasing, awareness, ad recall, preference, etc, etc a salutary lesson was rapidly learned that without sound intelligence of consumers' habits and practices, attitudes and motivations, actions and reactions, a brand manager is extremely limited in being able to plan effectively for the brands. And the ad agency people working on the pharmaceutical division's main analgesic brand were shocked at a research presentation to managers [the first ad test for the Reckitt & Colman group in Australia] when the current TVC for the main brand was clearly shown to be less than effective in communicating the intended benefit. Valuable results from product testing, packaging design testing, name testing, concept testing and all the valuable information from qualitative and quantitative studies all added to the steep learning curve. And so on across all divisions and brands the professionalism increased and the marketing people began to comprehend and appreciate the benefits of sound intelligence and to see their role in quite a different light.

The high standards introduced into Reckitt & Colman also resulted in some changes. A main ad agency with its research section had carried out some spurious research for Reckitt & Colman with some badly flawed label design testing before David's arrival. [Record on file]. When this was pointed out there was agreement by the agency that the methodology was flawed. They were asked to scrap the report and to do the work correctly again [with full payment] but it seemed that the event caused some umbrage in the ad agency. An attempt to regain lost ground by the ad agency's research section was ill-conceived and very flawed with incorrect facts and unpleasantness. This back-fired badly, resulting in the ad agency's research section being declared persona non grata for Reckitt & Colman at that time. All very regrettable! This is mentioned because at the time there appeared to be some questionable standards of quality and experience among some research people in some ad agencies at that time and later research sections became a questionable item in the ad agency's service and its bottom line. In time, as we know, the research section faded away and was replaced by the far more relevant, effective and experienced planner.

Having established the market research operation David then established the Group's first formal marketing intelligence role. Looking back it was a pleasure for David to see the difference made to Reckitt & Colman's marketing planning by all this innovation and sound planning and it was with some mixed feelings that he left to make a move back into the advertising field.

## **7. Phase 2 - The Planning Role in an Australian Ad Agency - 1969**

In 1969 David rejoined the small ad agency, Marketing & Advertising [which later became Hertz Walpole Advertising] where he had worked in account service before moving to Unilever seven years earlier. His appointment was account director on Woolworths, Harris Coffee & Tea, Letona, Velvalene Products and several other accounts. Woolworths was a particularly difficult account to service and there was much work needed on Harris [coffee and tea] and Velvalene Products [laundry aid products], too. Performance in account service was the path to take at that time as a conduit in

order to impress on management other skills so necessary for more effective agency performance. It was not too long before the opportunities presented themselves.

In the meantime, it soon became very evident to David that the agency owners were running an ad agency on very outmoded lines. Notwithstanding the fact that there was outstanding creative talent in the agency, the disciplines in account service and campaign planning were of a very inadequate standard. There was a great deal of uncoordinated effort and running around with very little sound planning or documentation, and marketing and market research were simply words which most in the agency had vaguely heard of but never experienced or comprehended.

It would be fair to say that the agency presented the image of a small creative boutique agency with little else to offer. Salesmanship and some excellent creative work had secured one particular large client. But David believed that no major blue-chip f.m.c.g. advertiser would give the agency much serious consideration and from his observation much would have to change if the agency was to start kicking major goals in the new business field. Given the opportunity to demonstrate the ideal way ahead, there was much that could be achieved to turn this situation around. Fortunately, the opportunities were around the corner!

## **8. The First Revelation for Management - Planning Changes the Status Quo**

Probably the first shock for a creative writer after David took over his accounts was his urgent view to the manager of Velvalene Products that he suspected that the TVC for Velvasoft fabric softener produced by the agency was virtually useless! The manager had asked the agency to schedule a burst on television and after David's experience in Unilever with the launch of Comfort fabric softener a few years earlier he suspected that they had a real 'dog' on their hands

The client was understandably upset, but David stuck to his guns and explained why he was worried and that a simple TVC test against the current Comfort TVC would clarify matters. This was agreed and he phoned the brand manager for Comfort at Lever & Kitchen [Unilever] and suggested that they agree on a swap of TVC dubs for testing at any time. He agreed and dispatched a dub of the Comfort TVC to the agency. The ad test was rapidly mounted and the results clearly showed that the Comfort TVC beat the Velvasoft TVC hands down and the qualitative reasons given by respondents clearly revealed how irrelevant the content of the Velvasoft TVC was and why it was so ineffective! The client was appalled by this clear evidence and so were the agency owners and the responsible creative who had written and produced the TVC. None had ever before heard of research being used in the creative arena to check advertising performance and with such a damning indictment of the agency's work!

However, the immediate problem was to replace the flawed TVC with an effective TVC and get it on air as soon as possible. With some experience of consumer attitudes and motivations in the laundry products market, and as a sometime past writer, David suggested an approach to the creative writer and this was followed with a script, casting and production. The TVC featured a well-known female celebrity-entertainer and her young daughter who endorsed Velvasoft for its outstanding benefits. In addition to the celebrity's appeal and authority, the mother-daughter combination had a soft-female angle which helped to further enhance the credibility of the story. This new Velvasoft TVC was then tested against the same Comfort TVC and the results showed that the new Velvasoft TVC came close

to equaling the Comfort TVC on all essential scores and established a useful point of difference. The client was delighted, the agency team was relieved and got back on track with the business. And that client was thereafter forever an advocate of the planning role in the agency.

[Note: David had always followed the principle not to trespass into the creative domain or conflict with the creative people in their role. However, there were critical times when the 'rule' had to be broken to save a crisis from developing. With Velvasoft, it definitely was the right thing to do. The client got the right campaign which worked and the agency retained the business which was on the verge of going elsewhere. Theodore Levitt would have classed this as -"doing the right thing" - as we shall see later on.]

This was the first real test of a completely new agency philosophy which was to emerge in the agency over the next 12 months or so, and timely too, as the client had been on the verge of firing the agency! It did not particularly endear David to the creative writer concerned on the Velvalene account but in time this problem resolved itself. Agency ownership partly got the message but the completely new concept of consumer-oriented, marketing-oriented advertising using research to help get at the real truth as opposed to a wholly intuitive approach with little concern for consumer-based intelligence or the real truth had not sunk in yet. It was too alien to the existing philosophy that prevailed in the industry at that time, and in some ad agencies still does!

## **9. Attitudes Changing - The Planning Concept**

By now, notwithstanding some slight defiance, mainly from account service people who David had been asked to counsel on documentation in preparing agency briefs and other planning material, there was some marked change in attitudes generally and an apparent recognition that something was happening in the agency, something new that was not fully understood but which looked as though it was producing the kind of results which clients liked. A feeling of some improved stability was pervading the agency people's minds and they felt that there was somebody who knew how to get the right answers and handle the tough decisions in a new way, quietly and efficiently. And furthermore the agency's owners were beginning to realize that a new phenomenon had occurred which needed careful nurturing and encouragement. They still were not sure how to define what was happening but certainly felt that suddenly someone was talking a language and introducing techniques which clients appreciated and that facts and intelligence were being made available where they never existed before. In other words the owners and some staff were beginning to listen and to want to know more

## **10. Re-Gearing the Agency to Win Blue Chip Business - Amoco**

The next opportunity to move the agency forward to a more comprehensive adoption of the planning role in the agency was the opportunity to submit for the coveted Amoco advertising account. It was the first time the agency had ever had anything to do with the petroleum industry and they were advised that 24 ad agencies were on the list!

David's view from both sides of the agency - client relationship was that notwithstanding that the agency had very considerable creative fire-power, the ability of agency management to present a wholly professional story and convince any major client executive that they were the right agency was very inadequate and their chances to clinch the business pretty slim at very best. He discussed this

view with the owners and persuaded them that the future for ad agencies was to impress prospects with marketing problem solving skills, demonstrable planning skills and experience in addition to great creativity, plus a thorough understanding of the client's needs in order to achieve success.

The submission for the Amoco business was the first really professional new business submission the agency had ever embarked upon. Prior to David's arrival there was no formal agency presentation format and no substantial agency credentials document. David first wrote the agency's first comprehensive credentials document. He then prepared an extremely comprehensive series of charts which demonstrated the thoroughness of the agency's modus operandi [really fiction up to that time!] and how the skills and experience in modern marketing techniques and the use of market research would ensure that everything they did for Amoco would be highly effective. It was probably the first time in Australia that the new account planning role was explained to a client in a major new business presentation. David spear-headed the presentation with the owners playing their roles in the new format as had been carefully rehearsed the day before.

Research was a key factor in the submission. David explained to the Amoco executives that while they were obviously extremely experienced professionals in the petroleum industry, it would seem that they did not know very much about advertising. His reasoning for this belief was that in the agency's study of their advertising over the past 8 years since their arrival in the Australian market they had observed that Amoco had chopped and changed their advertising approach several times and did not have any long-term strategy at all. This was a complete waste of advertising funds because there was no well-developed long-term strategy which would be the foundation on which to build future strength for the corporation. While the agency knew next to nothing about petroleum marketing it knew a great deal about effective advertising and if the agency was appointed it would recommend:

- a program of quantitative and qualitative market research in order to study the consumer petroleum market and to understand the prevailing consumer habits, practices, attitudes and motivations and to determine the strengths and weaknesses of Amoco's and the competition's current advertising campaigns.
- development of a long-term communications strategy and positioning for Amoco
- development of effective advertising for Amoco with the help of research where indicated
- post-evaluation tracking research on all petroleum advertising at least twice annually so that any decision for advertising changes would only be conditional on a weakness being detected in Amoco's advertising [This stage was especially included as a precaution against Amoco's perceived proclivity to change their advertising frequently].
- In terms of timing the agency advised that such an approach would mean that there would be no mainstream advertising for Amoco for about 6 months while the proposed program was progressed. But that as Amoco had not carried out any research of the consumer petroleum market since their launch in 1962 it was mandatory that a thorough market research program be carried out before making any major decision about Amoco's future marketing communications planning.

At an appropriate stage David dropped in the very fitting quotation from Theodore Levitt on strategy - *'If you don't know where you're going - any road will take you there!'* Some smiles and nodding indicated the agency was on track. Incidentally, the Amoco people seemed to appreciate this quote and in the following years with them it popped up over and over again when they relayed it back to the agency people.

David concluded that if Amoco would agree to this approach then the agency could guarantee that their advertising dollars would be effectively **invested** for the future instead of simply **spent** on wasteful advertising.

Amoco's selection and appointment of the agency out of 24 agencies, including a number of large multi-national agencies was a happy Christmas present for all concerned in December 1969. The promise of the new revolutionary planning role impressed Amoco so deeply that their committee unanimously agreed that the agency's presentation was way ahead of the other agencies.

## **11. Amoco - Laying the Foundations**

It was agreed that some kind of 'holding campaign' would be advisable while the market research program was in progress. David devised a slogan - 'positive power' - and a creative writer [the same Velvasoft writer] wrote a radio campaign featuring a talk-back radio guru. This was aired and ran for a few months. 'Positive power' was later incorporated as a minor expression in the final creative campaign. The connotations were very appropriate and linked to a 'clean' story - positive in the sense of the power delivered from Amoco's final filtered clean petrol, and positive in the sense that Amoco had a positive belief in 'cleanness'. [Curiously, in 1988 the expression 'positive power' was used by the ad agency servicing the Mobil business in Australia. David commented on this in an industry magazine at the time - 'What's new?' The campaign was discontinued.]

In the meantime, Amoco asked the agency to consider a campaign for a petroleum additive named 'Amotone'. The agency produced a pilot TVC for Amotone and this was researched. The results clearly showed that consumers were very wary about additive stories by petroleum companies and believed that Amoco's additive named Amotone was simply a marketing ploy to the public and had little credibility. The matter was shelved.

To help bed down the new business David sat down with the Amoco managers and prepared the agency brief document covering the three channels - retail, industrial and rural. This included traveling around Amoco's territories, listening to Amoco's clients and building a cohesive picture of Amoco's operations in Australia to help the agency team on the Amoco business.

When the results of the consumer research program were presented there was a great deal of valuable information, particularly on petroleum companies' advertising. Probably some worth mentioning were Shell with its excellent 'Go well. Go Shell' campaign [in later decades resurrected again after an absence] and 'Caltex Astron' , a poorly conceived and frivolous additive campaign which was a complete waste of money. Caltex withdrew it shortly after. The BP campaign, dominated by the BP Pick-a-Box Quiz Show compered by Bob and Dolly Dyer appeared not to be working too well and the findings were substantiated when BP withdrew the BP Pick-a-Box Show a few months later to the general surprise of the community. Golden Fleece ran a driveway service campaign which was

extremely superficial, very unbelievable and a complete waste of money. It featured smiling Stanley, the driveway attendant who cleaned all the car windows and then presented a lady customer with a big bouquet of flowers as a demonstration of Golden Fleece's superior care for the customer. David made a point of parking opposite some Golden Fleece service stations to keep surveillance of the action. During the hours he spent watching, not one 'Stanley' bothered to clean a single car windscreen ! A salutary lesson in delivering what you promise, otherwise forget it.

In terms of strategy development there were a number of aspects for close and careful consideration:

- There were early signs of increasing community concern about environmental pollution and that petroleum companies were among the main perceived corporate culprits.
- Amoco was the only petroleum company which had a filter device on the petrol pump hoses in order to filter any suspended dirt out of the petrol before it entered the car petrol tank. It was named the 'Final Filter' and had been strongly promoted in all Amoco's advertising.
- Young people were heavy users of petroleum products, were more interested in cars and traveled more, mainly recreationally, compared to the community in general.

## 12. Amoco - Strategic Direction

It was decided that the Final Filter had to take a prominent position in Amoco's advertising because there was a strong story and it was a unique selling point - BUT - instead of selling the technical aspects with illustrations of dirt particles being filtered out of the petrol [as in past advertising] the agency would use the Final Filter as a symbolic proof of Amoco's concern and dedication not only to clean petrol but to CLEANNESS OVERALL, and in particular Amoco's attitude to a clean environment. **Amoco would take the high ground as the caring CLEAN PETROL PEOPLE** and by inference, have CLEAN IDEALS and CLEAN STANDARDS.

## 13. Amoco - Creative Breakthrough and New Positioning

A new creative team took over and developed a raunchy jingle 'Amoco In My Machine.' This brilliant and highly intuitive creative treatment was consumer tested with a small panel of motorists with an extremely favorable response.

When this imagery was presented in the first TVC together with a long-haired young 'hippy' driver and young friends enjoying being on the road with Amoco it proved to be a tremendously potent combination, particularly with the brilliant sound track:

"AMOCO IN MY MACHINE"

- a raunchy, pulsating jingle with stunning lyrics enjoyed by young people experiencing their freedom away from the cities out on the highway with Amoco - In My Machine!

This completely unique, intuitive and breathtaking creative interpretation gave effect to the strategy in an explosively challenging way, audaciously breaking with all the prevailing norms of petroleum advertising and setting completely new standards.

It is also worth making the important point that the prior strategy thinking was a dual creative and planner thought process, both feeding on the input from prior research findings in the early first stage of qualitative [group discussion] research. This substantiates a clarification David made to an agency chief recently that sometimes from research and analysis a clear strategy emerges and this is the definite direction to follow. And at other times the whole picture and possible opportunities is not so clear-cut and the matter needs discussion to come to an agreement on the best way to go, whether the suggestion comes from the creatives or the planners doesn't matter. The main point is that good intelligence input is an important part of the process to stimulate thinking. In a letter to Ad News 3 August 2001 titled by the editor 'Cutting Edge Comments' on the subject of briefs, David made the point - 'My view of this important document [the campaign brief] is that although it may be prepared by the [good] planner, it is sometimes best completed after discussion with other people in the agency.'

Basing the strategy for Amoco on the 'Final Filter' and 'Cleanness' was natural thinking by the team - creatives and planner. However, the spectacular, mind-blowing soundtrack and lyrics and overall concept of 'Amoco In My machine' was a huge surprise when David was invited upstairs to the tiny cubicle which masqueraded as the agency's sound studio to hear the first sound track. That kind of intuitive brilliance was way outside any planner's domain.

The 'Amoco In My Machine' TVC was a brilliant breakthrough. However, it was extremely unconventional. It 'broke rules' and was daring. There was a possibility that Amoco management might find it difficult to accept such a radical approach. The agency had won the business with a promise of marketing orientation in all it did. In keeping with this covenant with Amoco it was necessary to carefully check consumer reaction to the finished TVC.

The 60 sec TVC was tested at ASI with their audience response technique. David and others from the agency and the client executive felt the hair rise on the backs of their necks in anticipation as the indicator appeared on the monitor in the viewing room while the commercial played and instantly climbed high on the chart remaining there until the very end with hardly a tremor, a rare test as many commercials experience considerable fall - off towards the end of the commercial. Research and consumer endorsement of a highly effective TVC.

And so the New Amoco image was born in Australia. And how!

The highly emotive 'Amoco In My Machine' theme-jingle became a public favorite as awareness grew and in due course the tracking results for Amoco showed the highest petroleum advertising effectiveness measurements in the market, with equal ad recall to Shell while only spending a third of Shell's expenditure. Incredible ROI!

#### **14. Amoco - Continued Planning**

Later, when a new TVC was needed the creatives came up with two alternative approaches:

- An old Australian swagman ['swaggie'] or roustabout, telling the story of Amoco.
- An old derelict car abandoned in a field which 'comes to life' when its tank is filled with final filtered Amoco petrol.

These two concepts were consumer tested with a strong preference emerging for the 'car in field' ['rejuvenated jalopy'].

However, from the qualitative diagnostics of the test there were unfavorable comments about the final closing scene of the 'car in field' story-board. This showed flowers shaped in the name, AMOCO, appearing in the field. This was perceived as somewhat divisive. The 'car in field' TVC was successfully shot with a different and appropriate ending. It became one of the most remembered television commercials and received enthusiastic, spontaneous applause from many audiences when shown in cinemas. It received highly deserved acclaim and awards.

In this and later commercials, the creative authors used much cherished old vintage car models which had a particular appeal to younger and older people alike and together with an overall sensitive treatment the campaign held a strong appeal to all age groups. In addition, the creative authors had chosen to enhance the Amoco campaign with a friendly community oriented slant and a touch of whimsy which greatly strengthened the campaign and the appeal of Amoco to the motoring public. The appeal to the heart worked wondrously throughout and was a hallmark of Amoco's famous campaigns in Australia.

Altogether, the Amoco campaign was one of the most successful longest running campaigns in Australian petroleum advertising history. Its highly acclaimed television commercials became a landmark in Australian advertising annals. A great credit to the talents of the creative authors.

Important, also, the entire conduct of Amoco's highly successful advertising is ample testimony of the credo that **skillful, experienced planning** and **great creative talent** are the **ultimate combination** that any advertising agency can have. Remember, too, that this occurred in 1970 and commenced in 1969 when the promise was presented to Amoco.

Remember, too, that the agency had never before experienced sophisticated marketing and advertising techniques and had never carried out any major research program. This was a truly pioneering era for planning in Australia.

There were many other instances of sound planning on multiple accounts. But perhaps three more will highlight the real benefits.

### **15. Edgell Potato Whip - Launch of an Instant Mashed Potato.**

In early 1970, while the agency was getting on with servicing the Amoco business, the opportunity arose to submit for the business of the Edgell Canned Food Division, Australia's premier marketer of quality canned vegetables. Again, the agency was up against many other ad agencies, including large multi-nationals and the project given to the agency was the launch of an instant mashed potato.



The thorough marketing-oriented presentation to Edgell impressed them and the agency was briefed on the project. Groups were carried out on meal preparation and preferences, potato preparation and eating, including mashed potato and the use of instant mashed potato.

The proposed standard packaging for the product was the sachet. However, David also recommended that a test be carried out on two sizes of ring-pull can for the product. The ring-pull can was an excellent point-of-difference compared to Deb, the market leader, because Deb's formulation was in potato flakes which were not able to pour from a ring-pull can while the granulated formulation of the Edgell Simplot formula poured easily. The larger ring-pull can at the higher [better value] price was preferred. The can later proved to be a real winner for the brand.

From the insights gained from all this information David prepared the recommendations which included:

- Brand name
- Packaging design
- TVC
- Magazine advert
- Retail trade material
- Test-sampling in homes
- In-store sampling

A number of brand names were developed including one that David had suggested -'Potato Whip'. This was derived from some comments from some housewives in the groups that they felt that 'whipping' the mashed potato made it less stodgy. These names were consumer tested in a two-stage test. Also included was the name of Cadbury's successful UK brand, 'Smash', in order to see how it performed as a brand name in the Australian market. The agency knew Cadbury intended to launch an instant mashed potato product in Australia and was concerned that it would be up against a powerful operator.

The results of the test were very significant. 'Potato Whip' rated the highest score as the most preferred brand of instant mashed potato and 'Smash' rated a very poor last as an instant mashed potato brand. David knew that if Cadbury decided to launch their instant mashed potato product in Australia with the UK brand name 'Smash' they would run into problems and possibly fail.

In briefing the creative writer [the same Velvasoft writer] on the Potato Whip advertising David suggested that for emphasis and a point-of-difference an Irish potato-eating family be considered. This advice was followed and a workman-like TVC was written featuring the 'experts' on potatoes, the Irish family.

In conclusion, the launch of Edgell Potato Whip was an outstanding success, taking nearly 50 % of the market from the original market leader, Unilever's Deb brand, within the first 18 months.

As David had predicted, Cadbury's brand, Smash [with the same Simplot formula as Edgell Potato Whip] failed miserably and was de-listed about 18 months later.

So a small Aussie food company and its small marketing-oriented Aussie agency with an experienced planner on board defeated the large multi-national food company, Cadbury, and its large multi-national ad agency and ripped nearly half the market off Unilever's Deb brand, also.

As a result, Edgell appointed the agency to the rest of the Edgell Canned Foods account. A mark of appreciation and recognition of the benefits of an experienced and mature planning person to balance the other skills in an ad agency. And a real lesson for the agency owners that the value of a planner with comprehensive in-depth experience in f.m.c.g. marketing with the world's leading companies, plus a huge reservoir of market research experience as well as sound ad agency experience is a real boon and a money spinner for the ad agency shareholders.

Not only is the Edgell Potato Whip story an excellent example of sound marketing-oriented planning in an ad agency but also a salutary lesson that big multi-national companies and big multi-national ad agencies can get it badly wrong. Cadbury thought that success with a brand name in the UK translated to success in Australia, or anywhere else. They were wrong! 'Smash' is OK in the UK [It's smashing!] but did not fit the Australian culture. And their ad agency went right along with it all, presumably without any research and double-checking ! In fact their TVC compounded the negative effect by a humorous play on words - 'Not mash - it's Smash!' One mistake following another! Why did Cadbury and its ad agency make such disastrous mistakes?

**Finally, the Edgell Potato Whip case study in 1970 is probably the first recorded instance in Australia of the very comprehensive account planning role in significant support of a major new product launch.**

## **16. Harris Coffee & Tea - Centripetal Marketing**

Early in 1969 the agency had produced the outstanding 90 sec TVC 'Sailing Ship Saga' which sold coffee and tea together for the first time ever. The Harris story of clipper sailing ships bringing home fine teas and coffee from exotic overseas sources was brilliantly told with rollicking music and lyrics which caught the imagination and won the hearts of the community and the confidence of buyers in the supermarkets. Television station viewers saw the TVC and phoned the stations to ask when it would next appear. The name of E.H.Harris & Company achieved a new eminence and sales soared. And when the agency won a Clio in New York that same year for the best TVC in the beverage category - best in the world – there was surely much quaffing of chardonnay and celebration. Yes, you say - "Isn't that the kind of ad agency everybody wants?" Well, yes - and no, not altogether. Because the responsibility of the ad agency is to not only produce effective advertising but also to counsel on all other aspects of selling and marketing.

What the agency had forgotten was a range of tea and coffee packaging which was tired and out-of-date and importantly to realize that the market status of Harris had been changed by the very advertising that the agency had produced. When people were asked it became evident that when they

thought of Harris they saw clipper sailing ships and the romance and tradition of coffees and teas from exotic locations. But this was not reflected in the corporate logo or its packaging!

After David had spent some weeks together with the Harris sales manager preparing the first comprehensive agency brief documentation on Harris and the coffee and tea markets he sat down and prepared a situation analysis of what action was needed at that time. He recommended three things:

- A continued burst of the campaign [not surprising].
- A change of the Harris corporate logo from the long-established “Strand Coffee House” [ a popular venue in Sydney Strand Arcade] to the “Clipper Sailing Ship” [this surprised].
- A complete re-design of all packaging to reflect the essence and spirit of the famous Harris Sailing Ships Saga TVC with graphic reference to exotic overseas locations, bolder colours, some new names for blends - and the new Clipper Sailing Ship logo. [this surprised].

When these recommendations were discussed at length by the agency team and the client the 'penny dropped' for all and there was complete agreement. The agency got on with the job of a complete re-design project for all coffee and tea packaging and the new design of the Clipper Sailing Ship was adopted for the Harris corporate logo. In keeping with the stunning Harris advertising, the superb new coffee packaging designs were greatly admired by consumers and supermarket buyers and won awards for excellence. And attention to packaging design became a matter of considerable interest thereafter by Harris in the following decades.

In this little story is a salutary lesson. However wonderfully creative and successful may be the advertising an agency develops for its client [even the world's best], it is only part of many things a good agency must do for its client. This includes attention to all other aspects of marketing and selling. In this case after preparing a comprehensive agency brief document a recommendation was prepared. When the facts were expressed - in writing - the position was made crystal clear, where it had been only foggy and very unclear before.

The result - centripetal marketing - with the synergy developed from all the elements - advertising - packaging - logo - working together and reinforcing each other to best effect. The planning specialist was the catalyst who identified the problem and the opportunity and made it happen. But how did such an oversight and omission occur? It was a direct failure of past account management whose responsibility it was to **manage the account** and to work hard at developing all the best opportunities possible for the client.

All this may sound terribly logical and the solution, although the right one, not particularly surprising - and David would be inclined to agree. However, the plain, cold facts are that over and over again errors or omissions like this are staring ad agency people in the face and they don't see them! Right now there's a guarantee that there are thousands of situations nationally and across the global advertising world where the ad agency has allowed complacency or myopia to block out a need crying out for a solution on their client's business. Check! It may be your agency!

## 17. Unselling the Brand - A Beer Case Study

Later in 1976, another opportunity arose when the new marketing manager for Tooheys [a former client of David's at Letona] came to see the agency in a very worried state of mind. Tooheys was a leading brewer based in Sydney distributing in the state of New South Wales. Toohey's lead brand, Tooheys Draught, had been in steady decline for a number of years and the marketing manager was extremely concerned about the brand's advertising. Apparently, as the advertising on air didn't appear to be working the ad agency would produce another TVC. When this didn't work, they produced another TVC. And so on. It seemed that at no time did the ad agency recommend or carry out any serious investigative market research to try and determine what was the real problem and to find a solution. Toohey's fortunes rested to a great degree on the Tooheys Draught brand and no answers were forthcoming!

There was a meeting with the client and some agency people at which some creatives' views were that the current campaign was so obviously a failure - so let's start now and create a new campaign. Understandable! However, a view that the client and agency should know why the current campaign, which seemed to be quite popular in the community, was not working, was supported by the agency chief and accepted by the client and the agency was asked to investigate and submit its recommendation. Speed was imperative.

The key question was - Is the strategy wrong ? Or, is the strategy right but the execution wrong? Time was critical, so in the interests of speed and cost six group discussions were mounted - heavy beer drinkers, white collar and blue collar and females. David attended all groups, making notes and discussing further probing with the moderator towards the end.

The following is an extract from a slide presentation supported with a document of three case histories - Edgell Potato Whip Launch, Amoco Re-Positioning and Tooheys Draught Re-Positioning - prepared in 1987. The objective was to demonstrate the role of planning and research in an ad agency. The client executive from Tooheys kindly assisted in providing old beer cans, a video dub of the Tooheys launch TVCs provided by the ad agency and an authorized quote about the success of the final campaign. A copy of the following was provided to the Tooheys client executive as requested, as a courtesy.

Extract from Slide Presentation and Document:

A number of group discussions were mounted with beer drinkers - younger/older, blue collar/white collar and also females.

Respondents discussed their habits and practices, feelings, emotions, etc with all forms of beer drinking - hotels, at home, elsewhere - and experiences with different brands.

They were exposed to the packaging of every main brand of beer in Australia [all states] and many more brands from the USA, Europe and the UK.

They were also shown all the current main beer brands' advertising in NSW, particularly KB [a competitor, Tooths brewery brand] and Tooheys Draught.

The findings which were rapidly prepared and presented to the agency team clearly showed:

1. While aspects of the execution of Tooheys Draught TVCs were much liked and found to be entertaining [TVC - 'The Pub With No Beer'] particularly by males, it was apparent that the positioning strategy had no credibility at all and was regarded as a gimmick.

The Tooheys Draught campaign positioned the brand as:

- 'same as the draught beer that's pulled in the pub'
- 'like having a keg in your refrigerator'

Amusing animated cartoon approaches were used including one commercial with the story of 'the pub with no beer.'

2. Tooheys Draught image had many negatives in relation to KB
3. Tooheys Draught packaging was regarded as inferior to KB [in an attractive gold can]

The conclusions stated [quote]:

1. While the Tooheys Draught campaign [Same as a 'keg in your refrigerator - equation with pub draught] originally created a humorous point of difference and interest, and was a novelty in the early stages, it never achieved any credibility or desirable associations for the brand.

It now only continues to labour its story without any chance of building strength into the brand's consumer franchise, to the point of dangerously threatening its future viability as an 'acceptable' brand [**Further unselling the brand**].

Compared to Tooheys KB, Tooheys Draught has acquired long-term unacceptable associations from a mass beer market viewpoint and cannot match Tooheys KB in terms of current self-image perceptions among the beer drinking community

2. A dramatic change of direction is strongly indicated which will:
  - Establish a more acceptable/desirable positive life-style association for Tooheys Draught.

[Comment: It will be noted that there is no mention of a tight brief provided - which was not possible - only an unspecified change of direction, and that the loose expression 'life-style' was used and could be interpreted quite differently in a huge variety of ways. We will see the highly intuitive and brilliant campaign finally created by the talented team].

- Effect changes to the pack design which will reinforce association with the new positioning of the brand.

These findings were discussed at great length in order to familiarize the creatives with the finer points.

## CREATIVE DEVELOPMENT

The creative team immediately commenced work on a campaign and new packaging design.

As soon as the elements were ready more group discussions were mounted among target market beer drinkers [Again, attended by David].

Respondents were exposed to a montage graphic and good quality [musical] sound track to represent each of three prepared TVCs for Tooheys Draught:

- 'cricket'
- 'sailing'
- 'horse racing'

- based on the theme:

'How d'ya feel? I feel like a Tooheys or two.'

Reaction to the campaign concept was overwhelmingly favorable and very much in the direction of the desired image sought [for the brand].

However, a series of innovative [including 'nouveau art'] can designs were exposed to target market beer drinkers and all **failed badly** to match up to expectations of a 'good beer' [The subject of beer can designs is a most complex subject].

## FINAL RECOMMENDATIONS

The agency presented its recommendations:

- the theme 'How d'ya feel - I feel like a Tooheys or two' with the tested montage graphics and finished sound tracks.
- the new pack designs which a new design team completed after a careful review of all the comments of beer drinkers at all stages of the research and a study of the design elements in those packs most favoured. This featured a tankard of beer, large on a white background with bold red and black type face.
- [ Comment: After the first stage pack designs failed, David carefully briefed the new designer on respondents' views of designs, particularly a Western Australia brand, Swan Draught which featured two glass tankards of beer with bold red and black type-face which was favorably viewed. In listening to respondents' views and reactions to beer can designs David learnt a great deal, some

of it quite surprising. For example, the XXXX [or Four X] brand of beer from Queensland was greatly liked. In truth, from a pure design viewpoint it was not appealing, but the design of XXXX and the can colours of red and yellow certainly was singular and stood out boldly and in the local culture among beer drinkers it was considered a 'good beer'. ]

The final presentation document was written by David and a presentation was made to the client incorporating the brief findings from the market research and the testing of the final creative campaign, 'How d'ya feel?' Included were the brief research findings on the new beer can designs which had been rejected [these were displayed on view] before showing the resultant final design developed. The new designer later said - "After the market research done on the new creative submission and some new beer can designs David explained that although the campaign was OK, the new beer can designs had flopped. David was able to get a good feel for those [other beer can] designs which received positive comments. This was very helpful because starting from scratch without any consumer input on attitudes and preferences would have made the job harder, especially as it was an urgent job which needed rapid completion ready for client approval. In my view this was a good example of some of the benefits from the planning role in the agency at that time."

Looking to the post-launch period, recommendations were also included for further consumer research, including a much-needed market definition study of the beer market and post-evaluation tracking research for the new campaign.

David headed the presentation in which the new campaign and new beer can design were revealed by the agency Creative Director. The presentation was simple and brief - about 20 minutes only.

So what did Tooheys get?

First, accurate confirmation that the strategy of the current Tooheys Draught campaign was a failure and only helped to **unsell the brand**. And why the packaging helped the demise.

Second, more helpful information was forthcoming on why the main competitor brand, Tooheys KB, and its packaging was so successful.

Third, confirmed the complete success of the new Tooheys Draught campaign concept - and that media money would be well-invested on this approach.

Fourth, determined that the first series of new can designs for Tooheys Draught were unacceptable in the genre of beer drinking, and provided information which helped lead to the final successful Tooheys Draught pack design.

The success of this campaign by the brilliant creative team which was wholly intuitive with planning/research playing an investigative and support role was rewarded by a Clio in New York in 1978 for the best beverage campaign - the best beer campaign in the world.

#### **Sequel to Success:**

It is probably worth recounting the events which followed in order to reinforce a very significant point - that while great intuitive creative talent is the prime service of any good ad agency, the most

effective service stems from the combination of great intuitive talent and well-qualified and experienced account planning. This is the credo David strongly recommended in 1965 and has promoted ever since. Hopefully the following will clearly demonstrate this.

In 1978, after David had left the agency, following the extremely successful repositioning and re-launch of the Australian beer brand, Tooheys Draught, and its campaign achievement of a Clio award in New York for the beverage category - the best beer campaign in the world - the Tooheys advertising account moved to a newly-established agency

This new ad agency rapidly rose to eminence locally in Australia and on the international scene for a time and grew in stature and size. Many highly notable and successful campaigns were developed and launched. However, it is worthwhile taking a closer look at some campaigns. There were interesting developments which followed the huge success of the spectacular Tooheys Draught 'How d'ya feel? I feel like a Tooheys or two,' award winning campaign.

First, remember that following the determination that the prior Tooheys Draught campaign strategy was completely ineffective [and in fact actually **unsold the brand**], the new creative team developed an entirely intuitive solution to re-position Tooheys Draught. The brilliant campaign strategy based upon a sporting aspirational and reward theme was tested at early concept stage and was enthusiastically accepted by respondents as a campaign they very much liked and understood, and a beer brand they would buy. The omens were very good.

The agency followed the principle introduced and established by the director of planning and development that major campaigns and major decisions must be consumer evaluated, and carefully checked the validity of the new Tooheys Draught campaign strategy concept.

Following many years of successful experience analyzing and evaluating concepts and advertising ideas and with case histories of concepts in the agency which had failed or were very successful but needed modification, the planning director was highly qualified to assist in the decision making process. Had there been a flaw in the new campaign concept or some [small] element which needed modification there was a good chance that this would have been identified and remedied. And remember, too, that the initial new Tooheys Draught pack designs were tested at the same time and failed and were replaced by a design which was derived from the research into beer drinkers' views on beer can designs. As it was, the new campaign concept came through with flying colours.

So what happened down the track in the new agency after the huge success with Tooheys Draught? Let's take a look at the apparent developments. First, generally there seemed to be an overwhelming confidence in intuitive creativity without much need for research input at early stages or at concept development or final stages. Possibly consumer research was introduced on an ad hoc basis from time to time. But the most vital on-going input from an experienced and versatile planner was not in the agency's offerings to its clients. It seemed not to be the management's style. And maybe this was a significant omission? Still staying with the beer category, what followed?

Some time after the initial successful Tooheys Draught 'How d'ya feel?' campaign had been on air this new agency embarked on a variation from the sporting aspirational and reward theme and developed a theme which might be termed - 'Ode to the Working Man.' This literally took the successful sporting



theme and translated or superimposed it on a workplace scenario. It failed to generate the response imagined and was generally seen to be not working as well as expected. Any further use of the campaign was canned. The highly successful original campaign was resumed.

The agency was instructed to develop a campaign for a premium beer for the brand Tooheys Classic. The agency produced and launched the campaign for the brand which was regarded as less effective than originally hoped in achieving the desired eminence or the sales target for the brand, which was phased out in due course.

The agency was instructed to develop a campaign for a new, or revived, beer brand, Tooheys Country Special. The agency produced and launched the campaign which failed to achieve the popularity imagined and the brand was withdrawn.

The agency was instructed to develop a campaign for a beer with special appeal to women for the brand, Swan Gold. The agency produced and launched the campaign for the brand which was a spectacular failure.

One may debate whether or not a brand and its advertising succeeded in the market place. However, one assumes that the ideal objective for any brand is to build on success and achieve a satisfactory on-going market share through sound positioning and well-developed advertising strategies in order to maintain a continuing source of profit. If a brand has to be withdrawn from distribution after a reasonably short time this is a mark of failure. Probably one of Australia's most successful brands over the decades is Victoria Bitter [VB] which has maintained a simple strategy of the "working man's beer" and gained market leadership with this simple formula.

During the time all these beer campaigns were developed and aired, the agency did not have the benefit of an experienced and versatile planner. Nothing can be guaranteed absolutely, but something can be guaranteed - the chances of success can be greatly enhanced with the guidance and work from an experienced planner. And it's not just the professional experience. Personal stature and style and the refusal to bow to expediency are the qualities which stand out and differentiate the great planner from other agency people. In the case of the women's beer brand, Swan Gold, it would seem that although doubts were expressed to the client executive about the viability of such a strategy those from within and outside the agency were not able to persuade the client that it was not a good idea. Perhaps an experienced planner with the right qualities and the right stature could have prevailed to get the client to agree to research the strategy at an early stage or at the very least have persuaded the client to test the final TVC before committing large media expenditure in the market place? Or how about going ahead and testing the concept/ strategy at the agency's cost, irregardless?

Among these campaign examples Tooheys suffered losses or failures which could probably have been avoided and the agency could have avoided some reflection on its reputation. Early days? Yes, true, but the planning role had already been invented, implemented and had proven its effectiveness. And there was some awareness of the role at the time. Such cases are worth pondering about by both clients and agency management when they consider the ideal composition of a good professional ad agency team.

Possibly the case of Swan Gold - the beer for women - is an example of the very important difference between the ad agency which has completely embraced the planning philosophy and the ad agency which hasn't. First, it would appear that at the time neither those in the agency or outside it had the weight of solid, in-depth marketing and research experience or the special stature to influence the client executive to carry out preliminary research of the strategy or even a final check of the TVC. At risk was the client company's reputation, the client executive's reputation and the ad agency's reputation, not to mention financial loss for the company.

In any similar situation, in the case of a 'planning agency' the key guardian of the ad agency's reputation, the highly-regarded planner, would have very considerable authority in persuading the ad agency board to refuse to proceed with any similar suspect venture which was not properly researched. Literally - the agency would be putting its own reputation on a much higher priority than simply proceeding on a client's insistence and earning fees - "Well, if the client really wants to go ahead, let's do it!" Remember the Velvasoft fabric softener TVC that the planner refused to run for the client in 1969 because it was highly suspect. And the subsequent research which showed how right the planner was. Then the new replacement TVC which was tested and proved to be the right way to go against the market leader, Comfort fabric softener.

This seems a clear case where with the right kind of insightful agency policy in place, the agency planner would have mounted a crash research program [at the agency's cost] to get at the real truth - as the agency planner did years before when he failed, "Same as the draught beer in the pub," campaign strategy for Tooheys Draught was checked and found to be quite ineffective. Yes, the circumstances were different, but the principle is exactly the same. For important decisions - check with sound research. It pays! It pays! And if the agency can save the client executive's reputation through its integrity and concern in such matters, then the client-agency bond is greatly strengthened and the future much more assured.

This view supports the contention that the very best style of ad agency operation combines great intuitive creativity and sound pragmatic planning with a well-qualified and experienced planner.

**When there are tough decisions to be made in the ad agency it has been clearly demonstrated that the experienced, high calibre ad agency planner is a pivotal figure of influence for greater assured success.**

It is understood that nearly two decades later the new management of this agency now employs several planners and that planning has contributed to its success and reputation and the high quality of its creative work and service for its clients.

[Note: The information on the history of these four brands and campaigns has been assisted by the recollections and opinions of a former senior executive at the ad agency concerned and a former executive with Tooheys].

## **18. DIFFICULTIES AT TIMES**

### **19. Failed Food Product Launch**

Not all situations were with smooth outcomes. A client of a food company planned to introduce a range of fruit sauce hot-packs. David was concerned with this new development outside the company's past experience and strongly recommended that a product test be carried out to fully evaluate consumer reaction to the concept and actual product in use in homes. In addition, such intelligence on housewife's views would be extremely valuable in helping the creative team develop the most effective approach to sell the products' benefits. The client executive smiled nicely and thanked David for the advice but chose to go straight ahead and launch without any research. The product failed and was de-listed some 6 months later!

## **20. Difficult Client Management**

The management team of another large food company were quite put out when David suggested that as they had never carried out any main market definition-style consumer research on their market they should invest in such a major study in order to more accurately evaluate their brands' strengths and weaknesses and those of competitors also. This would be invaluable in examining strategies and planning for the future. The company executives at that time were very sales oriented and marketing experience was not a strong point. After patiently undergoing considerable cross-examination on reasons and costs, etc, etc there was final agreement to proceed. The report was very valuable and provided a clear picture of all the essential key information for future marketing planning and for the agency to consider carefully also. In fact, one particularly interesting point emerged. One of the company's brands had a relatively high preference measurement out of sync' with its actual lower market status. It appeared that the brand still held a latent preference in some consumers' minds even though the brand was slipping due to lack of past marketing support. A budget was put behind the brand and succeeded in resurrecting its fortunes and one more step was made in developing a better professional relationship with this client.

## **21. Royal Crown Cola - Success and Tragedy**

Another case study which was an enormous success - and - a tragic loss also was the test launch of Royal Crown Cola in Melbourne - under license to the agency's client Tarax in Australia - in the early seventies. Royal Crown Cola was a major player in the USA but was little known elsewhere. The agency studied the market carefully and drew up a strategy to position RC Cola with maximum impact against Coca-Cola. The creative team hit the jackpot with a raunchy boy meets girl TVC which was the talk of Melbourne town, achieving very high awareness. In all honesty, David says, to this stage, that while planning played a part, most of the input was from the creative team. However, group discussions were carried out in Melbourne before the launch among kids, teens and mums and the campaign got a strong green light. They all loved the TVC and its positioning seemed to be working well.

During the launch, sales of RC Cola galloped ahead. This was one time that the Coca-Cola team and its agency certainly did lose plenty of sleep. It had not ever happened this way in Australia before, and RC Cola ripped an unprecedented slice of the market from Coca-Cola. Then the corporate games and politics came into play. Schweppes bought out Tarax, decreed that it was company policy never to license brands and promptly ditched the highly successful RC Cola brand, the only brand which had ever seriously threatened Coca-Cola in Australia! Cadbury then merged with Schweppes and some

years later licensed Pepsi-Cola, not a particularly strong brand then with a chequered history in Australia. Then Cadbury later ditched Pepsi-Cola! Quite an extraordinary series of events! When one weighs up the issues of making and implementing corporate policy David invariably remembers Theodore Levitt's contribution - *"There comes a time in the life of every great corporation when it has to forget policy - and do what's right!"* Didn't someone once say: *"When you're on a good thing, stick to it!"*

## **22. Cosmetic Range - Honest Counsel to the Client**

Another pharmaceutical client was interested in launching a brand of cosmetics which had achieved some eminence in the US market supported by an outstanding campaign. At the client's request David carried out research into the market and came back with the recommendation - don't launch! He was quite sure that the budget the client was able to put behind the brand was inadequate to gain a strong foothold. The client agreed and thanked the agency for its integrity and pulled the plug on the project.

## **23. Strength of the Marketing and Research Specialist in the Agency**

These were some of the types of areas of client concern when David was called upon to explain and try to win the day with sound marketing and research counsel. Sometimes the path to gaining client confidence was not easy because it occasionally involved having to give the client the bad news or go against currently held beliefs which were either myths or just unrealistic. In-depth marketing experience with many successful brand case histories and forearmed with knowledge of the many traps which waylay the inexperienced marketer equipped David to provide sound counsel.

In addition, keeping in touch with consumers through research and replacing opinions with the real facts from the market place plus value-added interpretation and analysis impressed clients. It enabled projects to get off the ground faster and more accurately. It helped clients to realize what was really happening and to secure their agreement more readily and rapidly. While there were sometimes difficulties, in the long run clients accepted the wisdom of the counsel in helping them with their marketing planning and the style of work in the agency in preparing successful campaigns. More and more clients began to see the agency as really understanding their business and very capable of being a welcome partner in their endeavours.

## **24. Planning Into the Future - Later Years**

This brief introduction to the invention and pioneering of the account planning role in the ad agency in Australia is intended to cover the early years only. There is not room to expand into hundreds of following case histories over the years. However, a few illustrations are of interest. Later in the seventies and eighties with other agencies in Australia, including David's own, he furthered the role of planning with considerable benefit to clients and agency. One such case study is mentioned later under 32. 'Examples' - the highly successful Harris drip-filter coffee launch.

An interesting event occurred at a later stage in servicing Harris Coffee & Tea in the seventies. When considerable changes were affecting the tea market David spoke to the managing director about tagged [one cup] tea bags. At the time Harris had placed their faith in tea pot bags and had achieved considerable success in this segment. However, David's view was that there was growing acceptance

of the tagged tea cup bag and was concerned that Harris could be missing out on this expanding segment. He suggested that the retail store research data which Harris received should be checked to examine the patterns developing in the market. They did so and advised David that there did not seem to be enough evidence to prompt them to make a move into this segment. David asked if he could examine the store audit data and they agreed and sent over the reports.

David carried out an analysis and sent his report to Harris. Contrary to their finding there was sufficient evidence to show that a move into the tagged tea-bag segment at that time would be strongly advisable. A startled managing director thanked David and told him that they had placed an order for packaging equipment from Germany and would be moving with all speed to enter this growing market segment. Harris' entry into the tagged tea cup bag segment was successful and the agency benefited from additional billings to support the product.

This is a simple example of the style of intimate involvement with a client's marketing planning and activities which David practiced. His experience in f.m.c.g marketing with top multi-national companies and his analytical experience in research - of all types - was greatly valued and appreciated by clients. Sometimes the background and experience of account planners in later years has not encompassed this valuable "at the coal face" experience with top marketing companies. Together with the stature required and the access to key client executives this style of planner is of great value to clients and ad agency owners. It epitomizes the degree of professionalism in the ideal ad agency with a planner who is versatile and resourceful and has a background of valuable marketing and market research experience.

Another example was the highly successful re-positioning and launch of Delva Hair Care, a range of hairdresser take-home hair care products. Much to the surprise and concern of the client who had never commissioned market research before, research revealed that target consumers viewed Delva and its packaging as dull and uninteresting compared to other main brands. Re-design of the logo and packaging and the choice of a popular and charming female entertainer to promote both hairdressers as the experts in haircare and the Delva range recommended by hairdressers created record sales and raised the profile and prestige of the brand among hairdressers and the public.

In one unusual case study David had to take the bad news to a well-known food manufacturer client after some research during the launch phase of an innovative new product. All the planning for the product - formulation, naming, pack design, etc had been carried out before the agency's appointment without any research. David persuaded the client after several meetings to carry out urgent research on formulation, name and pack design. The findings clearly revealed a complete disaster. David's recommendation to cut advertising spending immediately, cease production and sales and special off the remaining stock was followed, saving the client any further losses. As a consequence the agency was appointed to handle all the client's other major brands.

Many other cases of planning and research occurred both with f.m.c.g. brands and service and finance companies. Research continued to form the base for sound intelligence so that decisions could be made based upon valuable knowledge from the market place.

## **25. IN SUMMATION**

## 26. Myopia in the Industry

We know that the 'How d'ya feel?' campaign for Toohey's Draught was enormously successful, became Australia's best ever beer campaign and won acclaim overseas with a Clio in New York in 1978 for the world's best beer campaign. Furthermore, it was the success story that turned around the company and put it on a sure climb to leadership.

As a rider to the story of this valuable case history David recalls an amusing [and sad] little anecdote.

Some few months after the launch of the new 'I Feel Like a Tooheys' campaign David attended an evening gathering at an industry association to hear two speakers on the subject of advertising. By strange coincidence the two speakers were from the big multi-national agency which had produced the highly ineffective Tooheys Draught campaign which failed so badly in the market place and lost the agency the business. David listened transfixed to the two speakers, one large and loud from account service, the other a 'comedian' from the creative department, as they rollicked along with their views on great advertising. Along with all the anecdotes of the great ad agency they worked for was a strong emphasis that guts and creative intuition were the two great combining features and - wait for it - forget all the bull about research. It only gets in the way of planning great campaigns. Knowing their agency's recent costly error when they had failed to validate the previous Tooheys Draught campaign which had failed so badly, David was very tempted to take them to task afterwards at question time but considered that it would have been simply a waste of breath. These were the attitudes which largely prevailed at that time, no matter how big and powerful and impressive was the agency. They were symptomatic of an industry myopia which existed among some agencies until very recent times! Come across any lately?

## 27. Ad Agency Failings

For all the stories of great ad campaigns which have helped to build great wealth, we know that there are many campaigns which have gone badly wrong. Wrong strategy. Wrong execution. Little comprehension of the true market factors or the real problem. Decisions on 'solutions' based on superficial, intuitive thinking only. Failure to do the tough homework. Failure to understand the role of sound market research and analysis. In short, lack of professional competence! The humorous and popular 'Pub With No Beer' campaign for Tooheys Draught which failed so badly prompts recall of the anecdote from famous ad man, Rosser Reeves, and his question to the troubled advertiser - *'Now what do you want of me? Fine writing? Do you want masterpieces? Do you want glowing [intuitive] things that can be framed by copywriters? Or do you want to see the goddamned sales curve stop moving down and begin to start moving up?'*

## 28. Account Planning - Most Innovative and Important Change

There is sufficient evidence and many case histories for marketers and ad agency people alike that the specialist planning role in the ad agency is the **most innovative and important change** to have occurred in the past half century in the advertising industry. Why did some high profile executives in large multi-national ad agencies pooh-pooh the planning role for so long before being forced to eat

humble pie and take the role on board? While their best clients - manufacturers and marketers - were practicing the principles of Total Quality Management [TQM] to improve their service to customers, these ad agency executives seemed to believe that the ad agency business didn't need all that [TQM] - didn't need to develop the best philosophy and system that ensured their customers, their clients, were getting the best service possible! And incidentally also increased profits for them!

### **29. Lack of High Calibre Planning**

**We are now in the era of the skilled and experienced planner in the professional ad agency.** It's what important clients with main brands and services want and need to increase their chances of success to grow market share and profits. Lack of high calibre planning has been and still is the main cause for expensive brand launch failures by marketing companies. It is also the main cause for inefficiency and failures in marketing communications by ad agencies. But, it is worth emphasizing 'skilled and experienced'. There have been some appointments of entirely unsuitable people to the extremely important planning role. This is counter-productive and dangerous .

### **30. Planning Learns From Great Creatives**

In Australia, aside from David's initial valuable training and experience with Unilever, he feels that his most valued learning has come from working with some of the world's most talented creative people who he greatly respect for their stunning brilliance. It has been enjoyable and fun as well as a stimulating professional experience. He feels that their special skills are most unique. Someone once said that the definition of genius is, 'the infinite capacity for taking pains'. David's response is, ' Well, true. But I think they have much, much more. The very best are born with a special intuition and flair that is quite rare. These talented people have possibly helped to make me look better than I perhaps deserved when great successes were achieved. And it is a salutary reminder that even the best planning is of little value if the creative solution lacks flair and brilliance.'

### **31. Planning - A New Business Boon**

A well-qualified, experienced planner with some stature is also a great strength in new business submissions and in influencing clients' decisions. An experienced planner who is an authoritative and powerful presenter can be a great boon for the ad agency in helping to gain new business because clients see the experienced planner as an insightful, honest navigator, 'guardian of truth' and some insurance against possible problems and failures.

A high profile principal of a top USA ad agency claimed that planning was the best new business tool ever invented! Other ad agencies agreed. In 1992 *Adweek* magazine included an article - 'The Knights of New Business' - in which both insiders and clients credited the influence of planning with important new business successes. Research News, the journal of the Market Research Society of Australia [mrsa@mrsa.com.au] published an article on account planning in the issue Oct/Nov 1987 in which it mentioned that the billings of US ad agency Chiat/Day jumped from \$80 million to \$230 million two and a half years after account planning was introduced. More than half was credited to the role played by account planning.

In Australia, the chairman of SSC&B Lintas in 1986 spoke at a gathering of planning executives. He produced an index of his agency's operating profit between 1980, a short while after the agency commenced the planning role, and 1986. The figures revealed that over the six years the operating profit index nearly trebled. He attributed this growth mainly to the success of the planning role in the agency. He referred to the planners as **the intellectual heart of the agency**. The planning director was a former colleague of David Brent at Unilever.

David adds a rider to the point about new business. In general, but particularly when the skilled and experienced planner is a major influence in gaining new business, his/her on-going work and presence on the business is a great strength in helping to maintain on-going harmony and stability of the business, and can also be extremely helpful for valuable continuity when there is a transitory period between departing and new account directors.

### 32. Planning Examples

Research News, the journal of the Market Research Society of Australia also published an account of three overseas account planning successes:

When Apple Computer was ready to introduce the MacIntosh, it asked its agency to promote the computer's 'power'. However, through account planning, the agency learned that consumers actually wanted 'radical ease of use.' The resulting campaign stressed that anyone could operate the computer. The product soon became very popular.

Nike wanted to divert consumer attention from designer labels on leisure clothes. Agency account planners made this discovery: The company's target market wanted 'authenticity.' The campaign subtly stressed that Nike buyers play sports; they do not just watch others stay physically fit. The campaign was successful.

Account planners queried members of the target audience and learned that youthful consumers were not buying Bazooka bubble gum because it was not soft like the competition. This led the agency's creative team to write this theme: 'Are you tough enough to chew the hard stuff?'

In Australia, when the launch of automatic drip-filter coffee makers occurred in 1979, Harris planned to launch its brand of Harris drip-filter coffee and was keen on promoting the quality of its blended beans and its superior flavor and aroma released from the finely ground beans. There was a natural temptation for the ad agency to go along with this. But the planner insisted on carrying out research to investigate what was happening in the market. The results clearly showed that there was some confusion among consumers about the style of ground coffee and brand to be used with the latest automatic drip-filter coffee makers. However, the consumers were very conversant with the brands of automatic drip-filter coffee makers and discussed these with familiarity and confidence. As a consequence the campaign recommended and implemented by the agency promoted Harris drip-filter coffee as - "The brand recommended by the six leading brands of automatic drip-filter coffee makers." The pack - a can - boldly featured a drip-filter coffee maker on the front. A sample can of Harris drip-filter coffee was given away with each unit sold of the six leading brands of automatic drip-filter coffee makers. Harris drip-filter coffee rocketed to instant outright market leadership and remained there for many years to come.



### **33. Top Creatives Strongly Endorse the Role of the Planner**

Highly accomplished creative people who have experienced working with the skilled planner in their ad agencies have strongly endorsed the huge benefits from the contribution of skillful account planning. In Australia, Rod Bennett, Creative Director of Melbourne ad agency, Badjar Pty Ltd and industry opinion leader, published an excellent article in Ad News on 27 March 1987 titled 'The Theory of Creative Economics.' The following are excerpts from the article:

"The reason why we all need the planner is because he makes us all accountable. The planner pushes the client towards accountability because he audits the marketing input from the client company. ... The planner is not one more over-worked account executive with a full load ... The planner has the time, the explicit qualifications, and in the right agency, the research facility to audit just about any information the advertiser may deliver as part of the brief ... is able to assess the information for accuracy and relevance, and to test the key propositions for their power of persuasion ... is able to produce an internal brief that reflects genuinely the state of the market in advertising terms that is essential to both the marketer and the agency ... and is able to do it free of political influence, dogma, and subjectivity ... planning discipline gives briefing the single-minded focus it deserves ... the average account executive has not the time for clear focus on strategy ... never has had, never will have.

The planner delivers to the account team an extra brain ... with a single-minded focus. For creatives, the planner brings accountability through better briefing and review ... like a telescopic target rifle ... close-up view ... all the creative team has to do is to provide the high-powered, correct calibre ammunition. The creative team no longer has to hunt down its own strategy ... it is provided for them by the planner. All the creative team has to do is find the most relevant way of communicating the planner's key proposition ... the planner has the time [and the skill] to guide creative development through concept testing ... resulting in effective advertising that lacks none of the brilliance that makes for high consumer recall and acceptance.

The strategy planner's superior knowledge and experience with research is an essential factor in keeping the researcher accountable. The result of all this accountability will be advertising that is more effective ... works harder and faster and needs less support in media money terms. The 'Theory of Creative Economics' is the way of the future. I also believe that it is the [skilled and experienced] strategy planner who will guide us down that road."

### **34. Planning - The Long-Term Answer**

Finally, David feels that an important point must be made about the creative contribution in ad agencies. The account planning role is a vital one in today's ad agency for the style of clients who have the needs, important brands and budgets. Nevertheless, we know that great campaigns have been developed in the past without any specialist planner or research involvement - entirely intuitive. No planner, no research.

There have been many outstanding case histories from the past. There will be more in the future. But the world and business and marketing have moved on since the 1960s and 1970s and the whole

process of developing marketing communications has changed. It has changed because marketers began to demand accountability, because budgets had become much larger and damaging campaign failures became less tolerable, because more time and money spent up front reduced risks and resulted in better campaigns, more speedily developed, with less waste of time, fewer errors, more getting it right the first time and a more profitable outcome for the clients.

Astute ad agency principals began to realize that the well-qualified, experienced planner was an excellent investment. The agency spent less time, effort and money in developing campaigns, could handle more profitable business, and the agency developed a better partnership relationship with clients and a more stable tenure of business.

Win-win-win all round. So, yes, while a creative whiz can come up with a great idea and the intuitive campaign [no planner - no research] can be immensely successful, nevertheless across the board on all its main work the evidence is quite clear - the ad agency will more likely produce **consistently more effective advertising** overall and in the long term year after year with a well-qualified and experienced planner on board. It reduces the risk factor, helps to expose unrealized opportunities and enhances the chance of greater success. And in the main, clients demonstrably believe that account planning is what they want.

### **35. Skilled Intelligence and Hard Work Up Front - the Key To Success**

In warfare, your superior intelligence and good judgment in developing the best strategy will win the battle and the war. And you will survive with fewer casualties and get out alive and a victor. **A great experience.**

It is the same for business. If you invest in sound intelligence, with good judgment you will make fewer mistakes and you will prosper more than your competitors - and you will win. **A great experience.**

*'Now the general who wins a battle makes many calculations in his temple ere the battle is fought. The general who loses the battle makes but a few calculations beforehand. If you know the enemy and you know yourself, you need not fear the result of a hundred battles.'* Sun Tzu - *The Art of War*.

*'I hear and I forget. I see and I remember. I do and I understand'* - Chinese proverb.

Note: While all the main case histories and most comments are in the context of the Australian market, nevertheless the principles and precepts are for the most part universally applicable.

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Brand Plan P/L, PO Box 204, Vaucluse, NSW 2030, Australia.

Credits: Theodore Levitt - 'Innovation In Marketing' - McGraw-Hill.

Rosser Reeves - 'Reality In Advertising' - Random House.  
Thomas Cleary - 'Sun Tzu - The Art of War' - Random House

CLIENT ENDORSEMENTS FOLLOW ON NEXT PAGE

**HOW DID CLIENTS VIEW THE NEW ROLE OF THE ACCOUNT PLANNER?**

**HOW DID THE ACCOUNT PLANNER MAKE A DIFFERENCE?**

## **HOW DID THE PLANNING ROLE MAKE THE AGENCY MORE COMPETITIVE?**

The final arbiter of the effectiveness of the ad agency planning role and the executive responsible for all the planning and execution is without doubt **the client**. If the top agency planner is highly qualified, skilled and experienced and is well recognized as a person of some stature in counseling the agency team and senior client management, clients will respond very positively and the agency-client relationship will be more strongly bonded – a win-win result for all.

The following are some excerpts from clients' endorsements.

### **Item 8. The First Revelation for Management**

*“His professionalism and experience were quickly apparent and he rapidly identified a number of marketing and communication problems ... his all round experience in marketing, market research and advertising was very valuable ... always helpful, sure of his facts and able to communicate with incisiveness and clarity ... a dedicated professional ... his ability made him a key man and much of the credit for the agency's contribution at that time was due in no small way to him.”* Managing director of Velvalene Products Pty Ltd.

### **Item 16. Harris Coffee & Tea**

*“We had a busy and interesting period with new campaigns and packaging projects, all highly successful, carefully developed, planned and executed ... of particular note was the comprehensive, in-depth marketing contribution on many of our projects and problems ... his all round professionalism made a significant contribution to our company's marketing and advertising and I enjoyed working with him.”* Managing director of E.H.Harris &Co Pty Ltd.

### **Item 15. Edgell Potato Whip**

*“His professionalism and enthusiastic commitment was greatly appreciated by all our marketing team. We unanimously appointed the agency without hesitation as the presentation which was entirely co-ordinated and spear headed by him, was a long way ahead of the other agencies in marketing orientation, thoroughness and sound thinking. We found his wide experience, analytical ability and close co-operation most significant to the success of the project ... quite clearly it became evident that he was our ‘anchor man’ in the agency ... we were proud to have him as a ‘member’ of our marketing team.”* General manager of Edgell Canned Foods.

### **Item 23. Strength of the Marketing & Research Specialist**

*“His long involvement with the consumer product business and his research background made him a valuable member of our account management group. I found his contribution most helpful in the areas of new product development, consumer research and communications strategy ... his particular forte was, and is, his calm rational manner and his logical train of thought – invaluable assets in solving problems ... over the year we came to use his skills almost in the role of an unpaid marketing consultant.”* General manager of Edgell Canned Foods.

### **Item 24. Planning Into The Future [Aborting new product launch]**

*“I am very impressed with his all round expertise in advertising, marketing and market research ... he has serviced our requirements with considerable intelligence and skill, with flair and innovation in determining solutions, with a thorough down-to-earth understanding of our problems ... we currently*

*retain his services as a marketing consultant with particular regard to new product diversification and research and development – a most valuable investment.” Managing director of Traders Pty Ltd [ The Aeroplane Jelly Company].*

### **Item 31. Planning – A New Business Boon**

*“He was instrumental in developing and presenting a successful presentation of his agency’s philosophy which resulted in the agency gaining our business. He was a focal point for the agency in developing new business presentations and bringing to bear a keen marketing mind to the development of advertising solutions ... I had the greatest respect for his ability to clearly think through marketing problems, to provide specialized advice on market research, to carefully gather facts and draw logical conclusions ... this unique combination of marketing insight and advertising ‘flair’ was a key factor in producing meaningful, successful creativity, together with maturity and honesty in relationships at all levels.” Marketing manager of Taubmans Industries Limited*

### **Item 24. Planning Into The Future [ Delva Haircare – Re-launch]**

*“When I first met him I encountered a style of thinking I had not been accustomed to from agencies ... I found his contribution very worthwhile. He rapidly put his finger on a number of weaknesses and trouble spots that needed urgent attention ... he introduced me to a first taste of market research that produced a great deal of worthwhile information ... his most important contribution was in the area of thinking problems through carefully – and being able to help us look at things in a more informed way, especially strategically ... he was always very mature in his approach to making recommendations, and very fluent in getting his ideas over ... he is a very experienced marketing and advertising man ... the campaign was without doubt our best ever ...I am very grateful for his contribution to my company.” Chairman of Delva International Pty Ltd.*

### **Item 6. Pioneering Consumer Market Research at Reckitt & Colman**

*“He rapidly made his mark in the company ... introduced a great deal of new and innovative ideas into the company ... I and others found him extremely helpful and professional and very soon began to see the benefit of his undoubted skill and experience ... he was adept at rapidly pin-pointing the roots of problem areas [not just the symptoms] and developing effective solutions ... he brought an analytical capacity which was quite fresh to us all and the methods and techniques were in many cases quite novel.” Manager – Pharmaceutical Division, Reckitt & Colman.*

### **Item 17. Unselling the Brand – A Beer Case Study**

*“I found his counsel valuable. His extensive f.m.c.g. marketing and research experience at Unilever and Reckitt & Colman and his management and organizational skills provided a valuable service to the agency and its clients. I have found it a pleasure then and since to work on programs with him.” General Manager - Marketing, Tooheys Limited*

### **Item 11. Amoco – laying the Foundation**

*“I would like to thank you for your efforts on behalf of Amoco and your professional guidance in the conduct of our campaigns.” Marketing director, Amoco Australia Pty Ltd*

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### **Item 10. Re-Gearing the Agency to Win Blue Chip Business**

*“In the areas of management and organization, direction to account service, campaign planning and marketing and market research back-up he has been one of the very few exceptionally talented people in my agency ... I cannot speak highly enough of his fine contribution to the agency’s success.” Managing director of Hertz Walpole Advertising Pty Ltd in Sydney.*

#### **Item 5. The First Ad Agency Planning Role in Australia**

*“First, there were makers of products.  
Then, there were salesmen to sell them.*

*Then, there were advertising men, who  
were simply salesmen in print.*

*Then, there were marketers who grew a  
new science in consumer understanding.*

*Then, there were planners, thinkers,  
strategists.*

*This then, was David; among the first,  
and undoubtedly, one of the most professional  
thinkers at this early time, and still now.*

*Bruce McDonald  
Founder Chairman, Grey Advertising – Australia and the Pacific.  
Founder Chairman, Advertising Federation of Australia.*

**THE RIGHT HIGHLY-QUALIFIED PLANNER CAN MAKE A REAL DIFFERENCE – THE POWERFUL DIFFERENCE THAT HELPS TO WIN BUSINESS AND BUILD PROFITS FOR CLIENTS AND THE AGENCY**

SECTION ON THE AUTHOR’S BACKGROUND FOLLOWS ON THE NEXT PAGE

# **THE AUTHOR AND THE DEVELOPMENT OF THE PLANNING CONCEPT**

## **1. Inspiration for the Invention of Planning in Australia - 1965**

The planning role in the ad agency got off the ground in Australia at the same time as the early adoption by UK agencies for both identical and different reasons. And the motivation that inspired this in David's personal case, stemmed from an unconventional combination of experiences.

The original influence stemmed from experiences in the period 1948 to 1960 when the Malayan security forces - para-military police and army together with British and Commonwealth forces - fought a long and hard battle with the Malayan Communist Party, armed guerillas in the jungles and the Min Yuen, the communist masses underground support movement in the community.

After serving as a platoon commander in the defense of NATO and then further special training with the Metropolitan Police in the UK, David returned to Malaya [his childhood country] in 1952 as a para-military police officer. His first posting was second-in-command of a large police district of 1,200 police, para-military police and military operations personnel in a hinterland deep jungle area. His first command followed four months later in a nearby district with over 500 personnel. The years followed as a para-military police commander and also as an intelligence specialist combating communist terrorists and communist subversives until the conflict was won, the first time such a success had occurred since WW2.

The two key ingredients of victory were hard-won, accurate intelligence and well-developed strategies in defeating the enemy, winning the hearts and minds of the population and providing economic, social, political as well as counter-insurgency military solutions. As a result Malaya and Singapore were able to become independent and South-East Asia was free from the threat of a dangerous widespread take-over by communism.

## **2. Intelligence - the Key to Success in an Asian War**

David says, 'Sound counter-insurgency/subversive intelligence and sound crime intelligence are both achieved by many skilled methods including operating agents/informers and interrogation and analysis. Our view was that a dead terrorist was of no use at all aside from any documentation and other items and evidence gleaned. A captured or surrendered terrorist was of great value because with careful and sensitive handling extremely valuable intelligence could be gleaned in order to mount immediate operations against the local enemy forces in order to [preferably] induce further surrenders or destroy them, or to help build an increasingly reliable bigger picture in order to develop strategies and tactics to defeat the enemy in the jungle and to destroy the underground organization in the community.

The simple-minded 'gung-ho' call to 'search and destroy' espoused in earlier years was of limited value. While still employed, it was a drain on resources, with a very low contact success level. The more productive way was to develop the capability for accurate intelligence to know where and when the enemy would be and then to win them over or destroy them. Less emphasis on 'searching' ! Or to develop the bigger plan and force the enemy to move to a more inconvenient area or killing ground of our own choice, while working hard to destroy the underground organization which provided recruits

and supplies of food and intelligence, and to encourage increasing terrorist surrenders through reduced morale and denial of food and supplies.'

A friend of David and former [senior intelligence officer] colleague in Malaya who was later seconded to the CIA in Vietnam said, "Without having precise figures, I believe that there were more ex-terrorists working for our security forces by 1958 than active communists serving with [the Malayan communist leader] Chin Peng. In Vietnam, however, this invaluable source of intelligence was for the most part, vastly under exploited".

There were many factors which influenced final success including intimate familiarity with local cultures, a high level of dedication, support and loyalty by Malayans of all races, great teamwork and camaraderie, but **superb, hard-won intelligence became the key to final success.**

### 3. Myopia in Vietnam

This victory over communism in Asia, aside from the lesson of the enormous success achieved from sound intelligence organization and the right strategic planning, is also an appropriate analogy to illustrate the exact opposite - myopic obstinacy and refusal to recognize a new truth - new ideas, and the resultant incompetence. The Americans are to be congratulated **in principle** on their courageous decision to make a stand in Vietnam against the tide of aggressive communism sweeping through South-East Asia at the height of the Cold War. **More importantly**, the governments and people of South-East Asia applauded the stand of America and its allies which held back the flood of communism and allowed their countries to develop to the level of prosperity we see today without the danger from the evil empire.

However, what was a political, economic, social and military problem was tackled by the Americans almost solely as a military problem, escalated beyond belief. They never fully understood that Asian counter-insurgency operations cannot ever succeed without winning the hearts and minds of the people, a critical factor in maintaining a reliable flow of intelligence and co-operation. The Americans made little effort to win hearts and minds and even worse, their uncaring and ethnocentric attitudes alienated the Vietnamese. The Americans were also in too much of a hurry. The situation called for long-term planning and this the Americans couldn't understand. They wanted to finish everything in two years. The American politicians compounded this catastrophe with counter-productive shenanigans and myopia so that the combination of a 'gung-ho' military and uncomprehending, risk-taking politicians caused a winnable conflict to be lost! There were great achievements and heroism by units and individuals. But in the end being right in principle didn't help when the strategy and overall execution were so badly flawed.

### 4. Parallels in Myopia

So you ask - What's the relevance of all this? David's view is that the myopia and intransigence of the Americans in Vietnam is on a parallel with the rigid mind-set of the chiefs of some big multi-national ad agencies in Australia who pooh-poohed the planning role in ad agencies because they didn't understand it. They didn't want to find out more about it. And they ignored all the clear evidence of its enormous success. They did not have enough good business sense to realize that right under their noses innovative ad agencies were successfully practicing **the most important innovation in the**



**advertising industry in the past half century or more.** So ignorance and obstinacy prevailed - until they later realized their error and took the planning role on board. Is it a coincidence that many big multi-national and national ad agencies in the USA initially also strongly resisted the ad agency planning role?

Summarizing - quality intelligence, quality planning and the right strategy will always win the day against ignorant obstinacy and myopia by people and organizations who have no capacity for vision, think in the past and can't see clearly ahead. It applies equally militarily and in commerce.

To paraphrase Jose Ortega Y Gasset's view of breakthrough ideas and discarding preconceptions:

*"The person who discovers a new truth has had to smash to atoms almost everything he has learnt and arrives at a new truth with his hands bloodstained from the slaughter of a thousand platitudes."*

David confides that the idea of the breakthrough role of account planning in the ad agency did not come to him with any difficulty after he had experienced combat intelligence in a long war and benefited from years of hugely insightful work at Unilever's powerful and innovative research division. His profound experiences instilled an unshakable belief in it. But he does understand how revolutionary and completely alien it was to be when he first introduced it in 1966 and how some ad agency people were simply not able to bear such a change in their ingrained beliefs and refused to accept it, as you will have seen. Then it was a time of bleeding! Last, it is worth reminding the reader that the **difference** between the successful **conceptualiser-inventor** of the ad agency planning role in Australia introducing a revolutionary new philosophy against huge adversarial resistance and any **follower of the blueprint** is of an **unimaginable magnitude**.

## **5. A Final Comment on the Chronology of the Ad Agency Planning Role in Australia**

The various advertising campaigns for the Australian Meat & Livestock Corporation in the eighties are ample testimony to the excellent marketing planning and advertising planning by the senior management of the AMLC and The Campaign Palace. In the advertising business opportunity is sometimes the great precursor to success and the AMLC business for an ad agency would be a classic example of such an opportunity, particularly with its ample budgets.

A business which is intimately involved with the eating habits of the nation, with widespread use of its produce with all its segments and those of its opposition together with consumer segmentation, changing eating habits and changing social, legislative and economic conditions is a challenging opportunity to display great marketing skills and great advertising skills.

The Campaign Palace was extremely well-staffed with skillful and experienced management in planning, account service and creative and the agency benefited greatly in reputation from the highly visible creative end result of all the hard marketing planning and analysis – the well-crafted and spectacular television commercials which worked so well.

Nevertheless, it is a great boon for an ad agency to work with client executives who are highly professional, thoroughly marketing oriented and whose insightful contribution is invaluable to the end result.

Thus with the AMLC marketing chief, John Penn, at the helm, this was a vital factor in making sure that all the consumer research and social, economic and statistical research was available for close mutual analysis and mutual agreement on findings and planning together with remedial planning and programs for the butcher retail trade.

And an interesting observation would be that John Penn had come to the AMLC from Edgell where he had already experienced the vital planning work carried out at Hertz Walpole Advertising by planning pioneer, David Brent, in the seventies. This period with skillful planning from the ad agency impressed John Penn enough to say:

*“His long involvement with the consumer products business [particularly food] and his research background made him a valuable member of our Account Management group. I found his contribution most helpful in the areas of new product development, consumer research projects and communication strategy.*

*His particular forte was, and is, his calm, rational manner and his logical train of thought – invaluable attributes in solving problems.”*

*Over the years we came to use David almost in the role of an un-paid marketing consultant.”*

And later in endorsing David Brent’s account of his planning role, John Penn said:

*“It has been quite a nostalgic trip for me to read David Brent’s candid account of the contribution made by planning to the great advertising campaigns of the time.*

*Marketers now widely accept that the combination of informed and disciplined planning with outstanding creative produces the best results in advertising communication.*

*David’s success has been to realize the strength of this combination and tirelessly promote and practice it over the years.*

*The article of David’s is a ‘must read’ for anyone connected with marketing today. Experience is a great teacher!”*

Just prior to John Penn’s time at Edgell David Brent had master-minded the highly successful launch of Edgell Potato Whip instant mashed potato in 1970, which soundly defeated massive opposition by multi-nationals, Unilever and Cadbury to achieve market leadership. The Edgell General Manager at the time said:

*“Our marketing team’s decision on the winning agency was unanimous and without hesitation, as the presentation, which was entirely co-ordinated and spear-headed by David, was a long way ahead of the other agencies in marketing orientation, thoroughness and sound thinking.*

*David was very much our ‘anchor man’ in the agency. We were proud to have David as a ‘member’ of our marketing team.”*

The Edgell Potato Whip ad agency planning case study was published in a book, ‘*Advertising and Promotion – Communicating Brands*’ in the UK in 2005. Author, Professor Chris Hackley summarized the study, ‘*The success of Edgell’s Potato Whip in Australia was attributed to the agency’s account planning approach that integrated research findings into advertising strategy and*

*creative development. In addition, the company allowed the agency to influence their overall marketing strategy.'*

**The Edgell Potato Whip launch in 1970 was the first recorded major product launch program in Australia where the full benefit from the agency's extremely comprehensive planning role was demonstrated with outstanding success.**

Many readers have commented on this interesting clarification and the significance of the true facts in the long story of the evolution of the ad agency planning role which was independently conceived and pioneered in Australia [at about the same time as the UK] in 1965/66.

**END**