



# Open planning

## Media neutral planning made practical

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**Centre for  
Integrated  
Marketing**

The Centre for Integrated Marketing has been funded to research best practice and develop intellectual and other tools on behalf of leading marketers and their agencies.

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Integrated Marketing is a holistic discipline that involves the whole organisation in developing congruent, sustainable and high-value brand experience for all stakeholders.

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For further information and case studies, visit the MNP Best Practice Group website at [www.openplanning.org](http://www.openplanning.org) (or [MNPbestpracticegroup.com](http://MNPbestpracticegroup.com)) or the Centre website on [www.IntegratedMarketing.org.uk](http://www.IntegratedMarketing.org.uk)

# Introduction

In late 2002, the CIM invited a group of senior marketers, including representatives from IBM, Masterfoods, Ford, Vauxhall, Land Rover, Lloyds TSB, NSPCC, as well as senior agency representatives from across the discipline landscape, to develop best practice in the thorny and complex issue of media neutral planning (MNP)<sup>1</sup>. Supported by Professor Jenkinson and the Centre for Integrated Marketing, their important findings are being published by the CIM as part of their Insights Agenda 2004 and promise not only to make a significant contribution to the issue of consensual communication, but also to make a major contribution to the future of marketing communications generally. Briefings will be available for CEOs and senior marketers,

Their approach to MNP, developed as a result of the substantial research project, is based on *Open Planning*, with a raft of key tools and ideas, including 18 recommended executive actions and the beginning of a workable toolkit to make this practical. These findings will be added to the CIM's Canon's of Knowledge programme and forms the basis of the MNP Best Practice Group and its web site at [www.openplanning.org](http://www.openplanning.org).



Open Planning achieves media neutral planning and probably represents the most comprehensive update to communications theory and practice for decades

Research estimates by Jenkinson at the Centre for Integrated Marketing indicate that the potential payoff for the UK industry is in the region £4 billion to £10 billion.

## CIM/CFIM Research method and best practice group

The CIM supported and Centre for Integrated Marketing led research group (“MNP best practice group”) consisted of a judgement panel of more than 20 senior marketing decision makers operating across B2B, FMCG, consumer durables and consumer services industries and belonging to both client and agency sides, including representatives from PR, advertising, direct, media planning and other sectors. Some 20 senior marketing professionals had a consultative role supporting the core group. The core participants dedicated typically around 30-40 hours each to the research project that ran from November 2002 to December 2003.

The methods used included 7 half-day plenary meetings with activities ranging from action research, action learning, appreciative enquiry, and participative and facilitated discussions, expert witness statements, presentations, workshop activities, assignments, and illustrative examples. In parallel, there were also over a dozen sub-

<sup>1</sup> Details of their extensive research process can be found on the website.

group meetings working on agreed assignments and sharing their findings with the group. All core group meetings were recorded and transcribed for accuracy. The group also used a web-based forum that represents an additional data source. Findings were reported back and validated by the group. A dedicated website with discussion board and content analysis (hosted kindly by Novartis Europe) assisted the process.

The major contributors were:

Kevin Bishop - EMEA Marketing Director, IBM Business Consulting Services and CIM nominated Chair of the Group

Prof Angus Jenkinson – Director Centre for Integrated Marketing, University of Luton, and research leader

Branko Sain – Research Fellow, Centre for Integrated Marketing, Luton Business School

Alida Catcheside – Head of Direct Marketing Europe, Novartis

Barbara Lauer - Head of Marketing Strategy, Lloyds TSB

Colin Green - Marketing Director, Land Rover (UK) Ltd

Gordon Willoughby - Marketing & Content Sales Director, Financial Times

Joanne Sheehan - European Media Manager, Ford Motor Company Ltd

John Grounds - Director of Communications, NSPCC

Jos Sharp - Manager Integrated Marketing, Vauxhall Motors Ltd

Paul Smith - Regional Media Manager, Masterfoods

Peter Wilson - Marketing Controller, Pfizer Consumer Healthcare

Alan Wilson - Managing Director – ATG, Mindshare Media UK

Andrew Davies – Director, CRICKET Limited

Jeff Bartlett – Director, CAM

John Howkins - Planning Partner, Rainey Kelly Campbell Roalfe/Y&R

Peter Stephenson-Wright - Managing Director – Automotive, Wunderman - Europe, Middle East and Africa

Rob Gray – CEO, Mercier Gray

Simon Ward - Managing Director, Brodeur Worldwide

The research was supplemented by a literature review in both academic and trade press commentary. The Centre for Integrated Marketing also had access to research by Royal Mail and by the APG (Account Planning Group).

The findings were also informed by the Centre's own research into over 30 brands including more than 80 interviews with senior marketing decision makers from most industries and disciplines, mostly in the UK, along with senior academics and representatives from professional bodies (CIM, IDM, D&AD etc). A range of qualitative and quantitative investigative methods were deployed, including an on-going literature review of academic and practitioner publications, and databases such as the IPA Effectiveness Awards, in-depth interviews, expert witness interviews, focus groups, action research, action learning, appreciative enquiry, participative discussion techniques, questionnaires, tools development and testing. Case based research that explored actual practice and communications was an important element.

The group has formed the nucleus of the Media Neutral Planning Best Practice Group and hosts a web site at [www.openplanning.org](http://www.openplanning.org) or [www.MNPbestpracticegroup.com](http://www.MNPbestpracticegroup.com).

## The need for Media Neutral Planning

Media Neutral Planning (MNP) has come on to the agenda of senior marketers in during 2002/3, although some observers use alternative names: e.g. communication

**MNP is defined by the best practice group as a rigorous process for the selection of communication options which combines facts and imagination in order to drive continual improvement to overall ROI.**

channel planning or channel neutral planning. The reason for this is the increasing recognition of the failure of current methods and tools to optimise communication.

The MNP best practice research group identified a number of factors that contribute to competitive pressure, dysfunction and lack of optimisation:

1. The world is changing: it's more complex, the opportunities are more extensive, and the competition is smarter
2. Customers and other stakeholders receive more marketing communication than at any time in human history
3. There is an increasing pressure to demonstrate ROI
4. Success requires maximum efficiency and effectiveness
5. Current methods mean that efficiency is often not maximised
6. Even working with considerable efficiency and effectiveness, much marketing communications remains ineffective due to the competition's negating efforts
7. Even working at considerable creative effectiveness, excessive costs limit impact versus the competition's negating efforts and communication proliferation
8. Lack of precise, accurate and shared insight into both the brand identity and its stakeholder communities diminishes performance, and this appears surprisingly common
9. Lack of a governing idea for the communications spectrum diminishes performance, again surprisingly common
10. Failure to include all corporate functions and communication channels in planning sub-optimises performance
11. Fragmented, competitive practice, habit and payment methods in the marketing communications industry sub-optimize efficiency and effectiveness of performance
12. Narrow, discipline-specific and prejudiced communication objectives determine creative technique and goals adversely
13. Organisational structures based on excessive discipline polarisation sub-optimize performance, leading to skills, creative approach, objectives and research being channelled through silos on both client and agency side.
14. Planning and evaluation tools based on individualised communication disciplines do not reflect present planning and evaluation needs and bar inter-discipline planning and learning
15. Many communication perspectives, discourses and assumptions are inconsistent and sub-optimal (see below)

Examples of current marcoms assumptions and empirical examples when they do not work are listed below:-

## **Current assumptions... ...and why they are not true**

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### ***Structural issues in the industry***

'Above the line' and 'below the line' were accountants' structures for different agency payment methods, yet they still define roles and tools and planning language for marketers – indeed we noted many marketers who found it hard to hold a discourse without reference to this paradigm.

*It is not logical to define marcoms by the way the agency gets paid, not least because the methods of payment have changed. Instead we should understand communications on the basis of the way it operates. The CIM sponsored Media Neutral Planning research group (cited in the methodology section) concluded that these terms were both derogatory and meaningless.*

Our research shows that PR is not considered as an 'advertising' or marketing activity by many academics and senior managers. PR agencies are rarely included in initial

campaign briefings. Frequently there is no PR agency reporting to a senior marketing manager.

*Other senior agency representatives and clients we interviewed regarded the attitude as incomprehensible. PR drove the launch of the new Ford StreetKa model. IPA Effectiveness award applications frequently reference PR coverage as important elements of success. We note PR's importance to such different brands as IBM and Budweiser (IPAb).*

FMCG trade channel promotion is usually an independently managed budget/activity despite its proven impact on marketing. *The separation of this activity from integrated communication planning means that total timing and spend is not optimised.*

***Different tools are measured in different ways and then the ways of measuring define what the tools do in ways that limit creativity***

Direct marketing is measured for response because direct marketing is better at measuring response. Therefore response becomes its competitive advantage and defines its role.

*However, response is only one potential facet of direct marketing. Direct marketing and sales promotion are rarely tested for brand image effects, yet where they are there is strong evidence of both positive and negative results (depending on quality). From our research, Skoda, Land Rover, National Trust, Sainsbury and others have proved the brand-developing power of direct marketing. We also found SEEBOARD Energy and BT mail packs that very significantly shifted overall customer satisfaction with the company.*

Advertisers pursue awareness and ad recall when this is only a surrogate for the real objective(s). Because ad and brand awareness is the easiest way to measure ads, so the measure becomes the objective.

*Guinness White horses ads created significant levels of awareness, without corresponding sales. A Levi Strauss Marketing Week conference presentation (July 2003) of a pan-European campaign cited ad awareness achievements. Private discussion with the European CMO confirmed that ad awareness was definitely not the objective: consumers' beliefs are what matter. Millward Brown's BRANDZ studies of thousands of brands worldwide shows that brands have very different profiles in the development of customers from brand presence through higher levels of relationship towards 'bonding' and that this is the most significant cause of market share performance. (Source, BRANDZ database).*

'Advertising' is often not tested rigorously for sales effects.

*An IPA effectiveness award for VW cites their national advertising's goal and success in creating brand attitude effects amongst inactive buyers (the objective was to put VW into the consideration set), whereas their own econometric analysis surprisingly showed advertising spend was directly and strongly correlated with actual immediate sales to active buyers (IPAd).*

Since 'direct' and 'sales promotion' are in practice not deemed to affect the brand (since our research shows brand measures are rarely implemented), the rules for creativity historically ignore issues that 'advertising' would not be allowed to ignore. And 'advertising' and 'PR' are allowed to ignore sales performance objectives that 'direct' or 'events' or 'promotions' are not.

*The differentiation of creative objectives and rules goes beyond the actual differences in the disciplines. Direct mail can be targeted to build brand image and PR to create sales, or indeed why do either? The reality is that it is obvious that all marcoms positively affect both brand equity and sales, if they are any good. That means that there should be more learning and involvement between*

*the creative communities and their partner analysts, and common methods for defining and measuring.*

TV is often the preferred advertising tool because TV seems to be the best way to achieve the required awareness. However, other media are rarely tested.

*Boots found that mail media generated 27% more recall at 64% of TV cost when launching a new Boots No. 7 product to the target audience, (Jenkinson, Bishop and Sain, 2003).*

Websites are planned, designed and measured for hits and stickiness as a surrogate for their real purposes because these are easy to measure. *54% of UK category buyers are 'bonded' to Amazon based on BRANDZ data. This is an extremely high bonding level (around 5 times a typical category leader). Customer loyalty and commitment are the real 'stickiness', anything else is a guideline proxy. 'Hits' are an important measure but not the objective.*

PR companies rarely collaborate with media agencies over publication mix and target audience.

*Why is the wealth of media knowledge not relevant in planning PR? Why are PR objectives not included in the same media planning schedule?*

***Fuzzy concepts define our disciplines, and don't adequately define what is actually done***

A press release is PR - but 'advertising' or 'direct mail' that gets press/media coverage is not, even if it gets more coverage effects than the press releases

*Marmite's controversial TV ads generated a wealth of press/media coverage and work as PR (IPAc).*

10 million mail packs or door drops are not considered to be advertising, but a single poster in a ladies' toilet is. This is because advertising is incorrectly defined by the media it uses rather than what it does.

*Defining 'advertising' by the type of medium rather than its effects blocks creativity and distorts communication concepts. AOL, Air Miles, MBNA and other brands have used mass mail as a powerful tool for developing brand perceptions alongside sales. Websites are often designed as elaborate advertisements or brochures. In many cases brands would improve their 'direct' and 'promotion' communications if they realised the 'advertising' effects (Jenkinson and Sain, 2003b)*

The presence or absence of a telephone number on an ad changes its discipline and agency and measurement criteria. (By contrast, the presence or absence of a URL on an ad probably *doesn't* change the discipline or agency or even perhaps the measurement criteria.)

*To define communication by whether or not it has a response device again misses the real creative and planning issue: which is what attitudinal and behavioural change(s) are you trying to bring about? What matters is the total communication effect to be achieved and how this converts into business results.*

The statement is possibly American Express's single most powerful communication piece. What marcoms discipline is it? Young people standing outside St Pancras handing out [www.thetrainline.com](http://www.thetrainline.com) cards announcing the availability of a new web booking service precisely mimic medieval street criers, whose activities are the dictionary origin for the term 'advertising'. But what are they today? (Probably they were 'bought' as 'promotions'). When Virgin hand out ice-cream with their in-flight movie, what is this? When Costa Coffee spent their TV ad money on café redesign to

boost the brand, what was this in the product/service/communications mix? When Apple designed iMac to look so stunningly different, was this not 'reality advertising'? When the advertising agency proposed to a Buenos Aires property company that it built a fine pedestrian bridge across the river, what discipline was that? What type of communication is a row of 20 Chrysler Cruisers lined up down a busy Northampton pedestrian-only street by a sponsored owners club?

*The industry is characterised by insularity in thinking and tools and measures and creative practices that contradict the theory. It is useful to have various design skills but is it useful to fracture our attitudes to them? Marketing communication concepts are fuzzy and most of the celebrated work effectively breaks the boundaries. Marketers do not even share quality terms and language for the basic bricks of marketing communications: e.g. the concepts of 'target audience' (not a 'target', nor an audience!), 'a connected sequence of communication events', 'media planning' (when in fact it doesn't mean just media space!), the 'set of ideas that govern and harmonise integrated communications', 'brand definition elements', the real communication objectives, 'above the line' (what line!), and more. The examples above are not just verbal or mental tricks, nor is the aim to find a 'solution that works' for each. The point is to recognise that all kinds of thinkers/agencies could come up with these ideas, and pigeon-holing them in one discipline is not helpful. Instead, a media and discipline-neutral approach will enhance effectiveness.*

In summary, the marketing communications industry is achieving excellent results in its parts. However, it reflects decades of fragmented and competitive practice, habit and payment methods. The consequences include some mental and organisational structures that sub-optimize performance and polarise practitioners. Consequently, the concepts that underpin some marketing communication tools are inadequate for the contemporary challenge and the skills that marketers acquire are frequently dysfunctional or sub-optimal.

We note numerous examples of improvements in integration and media neutral thinking that lead to improvements. For example, IBM took 5% of its 2001 TV budget and funded a major integrated campaign to the City of London, achieving an attributable 7000% ROI and other benefits in the first year alone.

## The value of MNP/Open Planning

The MNP best practice group defined MNP as: 'A rigorous process for the selection of communication options which combines facts and imagination in order to drive continual improvement to overall ROI'. It agreed that major improvements to communications optimisation are possible when such a practice is implemented. According to the group, MNP:

1. Optimises communication potential
2. Enhances both effectiveness and efficiency in both process and communication.
3. Marries science and art, economics and imagination
4. Based on a new way of thinking and tools
5. Re-launches the client-agency contract
6. Embraces the whole organisation and every Touchpoint
7. Activates new concepts of media and of the communication disciplines
8. Defines new evaluation methodology
9. Is a key enabler of the overall integrated marketing objective: aligning communication and organisation

Excellence in MNP depends on some pre-requisites, such as knowledge of customers, good brand insights and appropriate value propositions. It is regarded by the MNP group as overall cost-neutral and result positive: the overall cost of MNP practice should be no more or less than pre-MNP.

The best practice group identified a number of synergy and functional/dysfunctional factors and argues that:

1. The more a company has a real, clear, differentiated core value the more benefit they will get from marketing communication
2. The ROI from over-investment in any single medium eventually declines with further investment
3. There is a media-multiplier effect: media working together outperform media in competition or silos
4. There is a discipline-multiplier effect: discipline working together outperform disciplines in competition or silos
5. People working together outperform people in competition/conflict
6. Communication merely copied to different media is not necessarily integrated, it is just replicated
7. Marketing communications need a critical mass in order to be effective
8. Single-medium campaigns can still be media neutral

Consequently, the group projects a potential value of £4 billion to £10 billion in UK industry alone based on appropriate action and change. This is based on an estimated combined marketing expenditure of some £40 billion and derives from a model based on the following elements:

1. Improved business cost (efficiency)
2. Improved employee motivation and alignment (psychological effects)
3. Improved business performance (effectiveness)
4. Improved customer value proposition (creative design, mission)
5. Better media-mix selection (budget efficiency)
6. Improved Touchpoint management (CRM effects)
7. Media-multiplier effect (harmonisation)
8. Improved communication relevance
9. Improved customer bonding – acquisition, share of wallet, and retention (satisfaction, psychological effects)
10. Improved customer brand equity (social pressure, market equity, price differentials)
11. Lifetime financial effects (time effects)
12. Improved analyst perceptions (shareholders equity).

The group noted that while many observers agreed with the need for change there was a widespread problem when it came to identifying how to do it. Many of the solutions merely repeated the problems or addressed part of the problem. Indeed, the name 'media neutral' had problems in as much as it tended to over emphasise media within the communication planning process and also to privilege 'advertising media' over other communication contacts.

The recommendations for change that follow are therefore based on a comprehensive and pragmatic method for implementing the many objectives that have been collected under the MNP umbrella, which we describe as Open Planning.

# Open Customers

Open Planning begins with developing *Open Customers*. Open customers are those 'self-segmenting' customers willing to receive communication, with communication then aiming to create open customers with open wallets. MNP puts the customer at the centre of the process, providing a consumer – brand – discipline – media dynamic to create guidelines for the creative output, not the other way round.<sup>1</sup>

Open Customers matters to media neutral planning not just for ethical and good citizenship reasons but also because only the communication that has any value to the recipient benefits the brand. The value may be entertainment, a good idea, helpful information, or social equity, but without being appreciated or winning approval it won't build brand or customer equity, indeed it may even destroy it. MNP begins with the person to whom communication is going to develop appropriate content, style and media, including how and when communication is delivered.

Open Customers also includes asking who the "customers" are. Open Planning applies to all stakeholder groups, including for example employees, journalists and influencers, with the same truth operating: unwelcome means not working.

# Open Thinking

Open Planning then requires *Open Thinking* and develops through eight action areas.

- Open Disciplines**
- Open Media**
- Open Channels**
- Open Process**
- Open Structure**
- Open Relationships**
- Open Results**
- Open Tools**

Open Thinking may seem an obvious requirement. It turns out to be neither obvious nor easy. Most senior marketers on both brand and agency sides believe in integrated or media neutral communication and huge effort is being put into achieving it, yet large problems remain, for example in optimising and evaluating the communications mix.

This is because most attempts to solve the problem operate at the same level as the problem itself. Many popular assumptions about marketing communications on closer examination are dubious or constraining, and yet these are redeployed in many attempted solutions. Solving the problem requires thinking at a different level to the problem itself, and this requires an open mind.

For example, Open Disciplines and Open Media reflect findings about the marketing communication disciplines, including for example advertising, direct marketing, PR, design, selling and so on. Closer examination shows that many of the heuristics or rules of thumb used in selecting disciplines and media for a communication project are self-proving theories that don't stand up scientifically. Each of the beliefs leads to marketing communications being designed to perform a particular task, which when achieved serves to prove that the belief is correct. However, a different design would have led to a different result. Demonstrating this may be one of those cases where science is the handmaiden of creativity, because the effect is to liberate creative thinking while enabling new rigour.

Examples of these heuristics include: "advertising is for awareness"; "above the line" and "below the line"; "mail closes the sale"; "rational and emotional media"; and "each discipline needs its own objectives".

The research findings suggest the need for a revised approach to both IMC and CRM, one that regards these as a single unified discipline and also accommodates all other communication avenues available to the brand, including for example the sales force and PR. This is not an issue of functional power, but rather of shared thinking and collaborative process. MNP/Open Planning proposes new communications theory at 4 levels:

1. How you define objectives: neutral, common currency business objectives based on core truths of the brand best enable richer communication
2. How you see and use media: unprejudiced media concepts mean that media work harder
3. How you see and practise communication methods or disciplines: richer communication concepts enable more creative solutions; better collaboration means faster, more effective working
4. How you collate data & learn: common currency results enable multi-discipline comparison and project pooling.

## Open Disciplines

*Open Disciplines* proposes the ability of any discipline using any medium to achieve any business objective. For example, Boots found, when launching a new product, that they could achieve 27% more awareness by direct mail than by TV at 64% of the cost. Marmite created more PR from its TV ads than its press releases. So have Benetton and Budweiser. Supermarkets are proving to be a powerful new advertising medium. Open disciplines therefore upsets the current assumptions about what does what. Heuristics are designed to reduce choice in a complex world, and this is incredibly useful. But the point of getting creative people involved is to innovate, not follow rules of thumb. If you ask creative people what they can do, the answer is: they can do almost anything.

Furthermore, current concepts of the disciplines that tie them to particular media, for example the rule of advertising belonging to paid-for media, are clearly nonsense, yet they are taught in most business schools around the world. Advertising, like all of the other disciplines, is a media-independent way of approaching communication that can be translated into almost any medium. An analogy to the current heuristic would be telling a painter that she is only painting when using canvas or paper and not when using wood or glass.

## Open Media

Similarly, media turn out to be much more flexible than the established rules of thumb. Most of the textbook descriptions of what media do as opposed to what they are represent biased thinking. For example, mail media have physical characteristics while TV ads use animated vision with sound. However, within these fixed frames there is an extraordinary and proven range of potential.

*Open Media* proposes that: Any medium can be used by all disciplines, in almost any mix. That means you can advertise in the mail, the Internet and product packaging as

well as on radio and TV. You can even use salespeople to advertise. Furthermore, one of the most surprising discoveries was the recognition that true creatives have a tendency to mix elements of different disciplines in a particular communication. They borrow from the traditions of advertising, direct, PR, product design and so on in creating a press ad, a mail pack, a web page, or a TV spot.

Furthermore, MNP widens the conventional understanding of media to include anything that conveys a message to a recipient. Any brand-stakeholder interface implies a medium. That means that all contact or touch points should be included in the mix and taken into account for effectiveness and preference. Leading media agencies and consultancies already recognise this, as when Mother recommended to Costa Coffee that they spend their money on redesigning the store rather than TV ads, or when Michaelides and Bednash recommended B.H.S. to spend money on in-store shopping assistants to keep customers buying rather than TV to attract them there.

Notice, nothing of what we really know is lost. Anyone who has used mail or TV or advertising or sales promotion successfully can continue to do so. But suddenly new doors are open, and these promise significant opportunities for competitive advantage.

## Open Channels

*Open Channels* (as here defined) is a new marcoms concept. Something follows from the freedom of disciplines and media. You can put a discipline, any discipline, into a medium, any medium: a discipline or indeed a mix of disciplines in a medium is then what is meant by a channel. Open Channels creatively and rigorously optimises the channel mix.

This is not only liberating for creative talent and an advantage when trying to achieve cost efficiencies, it is also key to enabling consent-based communication: biased thinking precludes self-segmenting customers. Open Planning means you can truly find out what works best or is most acceptable to the recipient and use those techniques.

Planning in the age of consent needs these liberating and more rigorous concepts because it is clearly proven that maximising effectiveness and efficiency of communication requires optimising the mix of media and disciplines in ways that work for the recipients. Like a single malt, the optimum mix might just be a single discipline in a single medium, for example to achieve a scale effect; an example is the Buenos Aires property firm that built a pedestrian bridge to promote its new office and shopping centre. But for most practitioners, most of the time, synergy effects come from great blends. For example, even the property firm used PR to highlight the bridge.

## Open Process

*Open Process* is a newly developed communication planning and evaluation process between the brand and its agencies. Open process is designed to ensure the best ideas are found and used. The research team has developed a recommended template, with a significantly upgraded and faster planning process, including for example the issuing of an open brief to every agency at once. This should possibly include the research agency and certainly PR and any important internal communication functions. It might even include key partner media owners.

At the moment, budgets are typically allocated across different media at the beginning of a communications programme – before the message and most appropriate channels for communicating it are properly understood.

MNP's open planning contends that more money should be available for the thinking time at the start of the process; the time to be spent focusing on how best to communicate, and how the different components of the campaign should match up. The additional investment at the start is more than recovered by the execution process being swifter – and better targeted. Different departments work together (in a multi-disciplinary team) and then allocate how much money goes on each type of media. Open Planning thus enables a company to think more clearly about how it wants to communicate its message to the individual customer.

## Open Structure

Open Process depends on *Open Structure*. Too many marketing communication functions are divided into disciplines and operate like silos with their individual budgets, often predefined. It follows from focusing communication on recipient preferences – as outlined above – that the communication function should be organised by different audience (or dialogue) communities, for example different kinds of customers, rather than primarily by discipline, as is routinely the case today. IBM's trial of this led to not only more efficient marketing activities – better results from less work – but also increased knowledge about the customer, enhanced learning and better communication.<sup>2</sup>

Agencies mirror this, even in many integrated agencies or groups. The agency analogue is to ensure that the interface with the brand ensures harnessing the entire ability of the agency.

## Open Relationships

Open process also depends on *Open Relationships*. It is vitally important that the CMO takes responsibility for ensuring that relationships with internal and external agencies are fully functional, which means partners focusing on common brand goals. Research suggests that for many brands this will mean changes in how agencies are paid, including paying for thinking separately from execution. It is also recommended that an element of agency pay is based on success of the team rather than the performance of the individual member.

This changes the traditional relationship between clients and agencies, and between the agencies. As Paul Bay, director of consumer marketing Levi Strauss Europe commented: "Integrated means the creative agency thinks of the idea and everyone else executes it. That's the convention. Changing that needs a lot of education and is very tough."

MNP's Open Relationships breaks down the walls between silos, encouraging clients and different creative agencies to work together to a common goal. In this kind of transparent environment, the advertising agency, for example, won't push to get money for TV advertising at the cost of an alternative channel or medium if the planning indicates that it would be better to divert more of the budget elsewhere. And Open Planning means adopting the best idea, even if it doesn't come from the lead

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<sup>2</sup> IBM - a new model for IMC, Jenkinson and Sain, Centre for Integrated Marketing

agency; there may not even be lead agency. This does not come naturally. Indeed, it means social intelligence skills become an even more important factor within brand and agency management.

## Open Results

*Open Results* means developing a common currency for marketing communications. The problem with many objectives currently in use is not only that they load the dice when it comes to planning, but also that they make it difficult to compare apples with oranges.

Furthermore, picking up on the theme of Hard Edged Marketing last quarter, open results means developing goals that really matter, rather than just following convenient measures. Take for example the dominance of awareness as a measure and goal of much marketing communication. (Some 45% of pay by results schemes currently use advertising awareness as the basis for assessing performance despite the weakness of correlation between awareness and market share<sup>2</sup>). Awareness is popular because it is the easiest way to evaluate a general ad. But once mass awareness is formulated as the simplistic objective, it tends to drive mass communication solutions that are unlikely to optimise overall results.

Furthermore, building on open relationships, the research recommends more payment by results, with separate payment for different aspects of the project, such as initial planning, execution and media independently, while also including an element of team performance bonus, practices that are all already in use by major brands.

Open Results means

- Defining more precise communication objectives and priorities
- That also provide a level playing field for every agency, discipline and medium to contribute to their maximum ability
- And the also enable the analyst to benchmark performance in a meaningful way
- While supporting and encouraging a culture and practice of team learning.

The research suggests ways and tools to achieve this.

## Open Tools

Making all this work clearly requires *Open Tools*, beginning with the process template and an open brief. Communication optimisation also needs tools capable of working effectively across the entire mix of possibility. For example traditional media planning tools typically do not include all brand touch points, but are instead restricted to paid-for media.

This is changing. For example, brand groups such as Masterfoods and Unilever are investing in their own technology. ATG Mindshare has been upgrading its suite of media planning tools to provide enhanced flexibility and a broader media range. Ninah Consulting encourages a strategic and consensus-based approach to modelling communication investment. Integration researches the effectiveness of contact points based on consumer perception. And PointLogic has been developing intelligent analytics. All such solutions require collaboration between the brand and the agency, and their successes demonstrate the significant financial potential of such work, with improvements of 10 % or more in media mix effectiveness being cited.

Beyond media planning, Open Results requires a single method of briefing and evaluating communication across all channels (all discipline and media mixes). For example, CODAR, a fractal and holistic tool considered during the research, has a powerful open standard for planning and evaluating any and all communication to any and all audiences and probably represents the direction of the future<sup>3</sup>.

## Recommendations for change

The conclusion of the MNP best practice group is that Open Planning is most likely to be implemented when a committed and competent client drives it. Key recommendations are outlined in below.

As further detailed in Jenkinson, Bishop and Sain (2003, in press), the CMO is responsible, and successful implementation may require changing the team paradigm, updating budgets, contracts, structures, skills and processes, aiming for a fusion of creativity and scientific rigour; with an effective customer community-focused, not discipline-focused organisation and an integrated process involving all 'agencies' as a non-hierarchical collaborative, partnership team – including research and internal – backed by solid information and learning. An effective, integrated planning and evaluation process based on enhanced skills and a common process template should be led by a steering team with skills in the brand, customers, communication and media, social competence and project management.

The major recommendations for senior client-side marketers are:

1. Recognise that you are responsible for integration, and the context for agencies to collaborate
2. Develop an agenda to get marketing recognised as a key player in organisation-wide alignment
3. Radically redefine your marketing communication concepts and language and develop 'multi-lingual' communication skills in your people and teams
4. Develop internal collaboration with other functions to achieve coherence and consistency through internal alignment across all aspects of the customer and other stakeholder experience; and thus get 'reality media' on board with your plans
5. Create a multi-disciplinary senior team with 5 key skills to steer big Open Planning projects: i.e. brand/customer (stakeholder)-insights/communications/media-channel/social (and project) skills
6. Organise and focus marketing and communications teams by customer and other stakeholder communities rather than discipline
  - Be business objective and customer focused, not media/ communication focused
  - Optimisation depends on quality insights about the brand's customer communities
7. Expect or be open to significantly redefining or redistributing your budgets
8. Pay agencies for ideas and execution, not their media spend; expect to reallocate costs and reward team results
9. Work with and pay your agencies (including PR) as a differentiated but non-hierarchical collaborative, partnership team.
  - Work with a truly integrated and genuinely effective agency or with agencies willing to work in a collaborative Open Planning environment

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<sup>3</sup> CODAR has been developed by Stepping Stones Consultancy Ltd in collaboration with the Centre for Integrated Marketing.

- Negotiate agreements that enable them to support good ideas that are not their own.
  - Pay all team members performance-related bonuses on the overall result.
10. Start with a quality brief, then in parallel develop communications mix and creative – better work/less time
  11. Define communications objectives in neutral, customer-oriented business dimensions that work for every agency and discipline. Brief all agencies (including Media/PR/HR-Internal and research) equally about major projects, and then listen
    - Optimisation is both an art and a science, and it needs a team capable of working together to make them a whole solution
    - MNP/ Open Planning principles support a variety of implementation methods: advantage comes from a culture of committed creativity
    - Eliminate the historic pecking order of agencies and disciplines: recognition of ideas and roles should depend on merit not history
    - All agencies (and internal functions) are capable of and should produce creative work and ideas in different ways at different times
    - Implement a common planning & evaluation framework/currency that works across the Touchpoints and communication methods
    - Development of a brief is a two-way (or multi-way) process between client and agency
    - Consider involving your major media/contact-owner partner(s) similarly: they can recommend innovative uses or pricing for media/contacts
  12. Use a single process-template and toolkit to support effective and efficient quality (creativity/productivity) and keep improving it. Creativity should play into every aspect of the process. Creative is not (just) an ‘above the line’ term for a group of people and their work. Rigour should also play into every aspect of the process, for example in creative thinking and expression of the brand
  13. Plan and allocate across all potential media/Touchpoints before allocating to one (or any): the process starts with the brief, then in parallel, not sequentially, comes the planning of communications mix, media and creative
  14. Adopt a true ‘action research/action learning’ approach over ‘accountability’ to maximise insights and improvement
  15. Benchmark your ‘media performance’ across all Touchpoints (both conventional media and other drivers of customer and other stakeholder experience)
  16. Collate and compare results from every communication project in any medium or discipline using common currency measures (develop econometric model). Unlock creative thinking with new measurements: the objectives and reward structures must reflect neutral or common measurement
  17. Make social skills/resources (partnering, learning etc) almost as important as marketing communication skills within the teams
  18. Optimisation requires a culture of fact-led decision-making and continuous learning

Most of these have equivalent agency recommendations.

1. Radically redefine your marketing communication concepts and develop ‘multi-lingual’ communication skills in your people and teams
2. Consider alliances and other integrated structures for pitches and performance, or go integrated
3. Competency in social partnering is the price of entry: grow people and policies which work well in multi-company teams and enable the best ideas to flourish
4. Expect to get paid for ideas and execution work, not media spend
5. Negotiate partnership agreements that enable you to support good ideas, not just your own, independent of media-spend

6. In order to qualify as an integrated agency, agencies need not only technical and creative skills but need to create team(s) capable of working with the 5 key skills (identified above) to steer client work: brand/customer-insights/communications/media-channel/social-project management skills. They also need to break internal barriers: ensure planning, evaluation and learning supports integrated not just multi-discipline solutions
7. Expect and engage the client to get communication-neutral briefs/business objectives
8. Collate and compare results across every communication project in any medium or discipline using common currency communication objectives (enhance econometric model)
9. Adopt an 'action research/action learning' approach over 'accountability'
10. Choose clients well and educate them and other agencies in your skills in return for learning skills from them

## Conclusion

Open Planning therefore gets people working together around a mental and physical tool kit that tailors communication to what really works for the customer, and therefore the brand, instead of what works for the media industry, communication production process or simplistic evaluation. It is 'hard-edged', delivers massive economic benefits, and promises more exciting creative work.

## Notes

For further information and case studies, contact the Centre for Integrated Marketing or visit the MNP Best Practice Group website at [www.openplanning.org](http://www.openplanning.org) (or [MNPbestpracticegroup.com](http://MNPbestpracticegroup.com)).

The Centre website is at [www.IntegratedMarketing.org.uk](http://www.IntegratedMarketing.org.uk)

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<sup>1</sup> Ideas in Media Neutral Planning: Just today's buzz word or a genuine new world order? Tina Kaye, 2003.

<sup>2</sup> Paying for advertising – ISBA/ARC study, 2000