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# **A lack of true believers in the account planning discipline in Australia?**

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**Key words:** Accounts, Advertising agencies, Australia

**Abstract:** On Australia, advertising agencies have partially embraced the UK-originated account planning philosophy. In an exploratory study, six senior account planning directors were interviewed to gain insights into account planning in Australia. It appears that the scale and nature of the Australian advertising industry militates against full acceptance of the UK model. Indeed, the UK model has met resistance from several areas. It was further found that the expectations of the planners' role probably exceeded the individual's capacity to deliver on that role. Hence, the outlook for planning other than for a small group of "true blues", to use the Australian argot, may have limited success in Australia.

## **Introduction**

Since its inception in the 1960's much has been written on account planning in the UK and the key roles of Stephen King at JWT and Stanley Pollitt at BMP. Agencies world wide now have established account planning departments to arm themselves with what Jay Chiat in the US cites as the best new business tool ever invented (Steel, 1998). A number of authors have indicated a range of reasons for the adoption and diffusion of account planning both in the UK from the mid 60's and in the US from the early 80's (e.g., Pollitt 1979; Barry et al., 1987; O'Donoghue, 1994). Accordingly, the adoption and growth of account planning either through organic development, imported concepts or the adaptation of imported ideas is an area of interest. The purpose of this study is to gain insights into how account planning has evolved in the Australian context.

## **Background on the Australian industry**

Scale is an important consideration for this study. Hence, it is necessary to first outline details of the Australian advertising industry. Total marketing communications expenditure in Australia in 2002 was \$25 billion, \$8 billion of which was invested in "above the line" media (The Australian 2002). There are currently listed over 1000 advertising agencies and communications consultancies in Australia, 300 of which are located in New South Wales (Ad News Handbook 2002). This is an

industry where the 80/20 rule very much applies. Where the big are very big and the small...well they are just small. Amongst the top100 national agencies, income ranges from A\$113M to less than A\$1M (Ad News Agency Report 2002).

In the UK, the move to adopt account planning appears to have been a seamless progression within the agency, from marketing research to the planning function from the mid 1960's. While in Australia the introduction of planning appears patchy. Early evidence of a switch to 'planning' is seen through the ideas of David Brent, an ex-military British intelligence officer, who had begun to integrate his skills into the gathering, analysis and application of intelligence to improve the standard of advertising effectiveness in the mid to late 1960's. However, he reports that in Australia there was a failure to recognise the potential of planning as a major contributor to the effectiveness of consumer communication (Brent 2002). It wasn't until the 1980's that planning resurfaced in Australia. Once again it was an entrepreneurial agency person who kick-started the planning approach. This time it was Reg Bryson, the current Chief Executive Officer of The Campaign Palace. This development in Australia coincided with Jay Chiat's implementation of account planning in the US. In both cases and in both countries the advent of planning at this juncture was due directly to the UK influence.

During the early period of planning development in the UK an effectiveness culture was the core factor in building a successful and innovative advertising industry according to Rainey (1997). In 1979, Stanley Pollitt stated that the philosophy had to change within the agency to accommodate getting the planning right rather than pleasing the client. The acceptance by all that the ground rules for judging advertising has changed. In researching the reasons for the slow adoption of planning in the US, Barry, Peterson and Todd (1987) found that agencies in general were content to produce advertising that pleases rather than be effective. However, some years later O'Donoghue (1994) reported that adoption of the effectiveness banner was a major factor for the growth in the planning discipline. It is this no coincidence that BMP with Stanley Pollitt and JWT with Stephen King have dominated the IPA Effectiveness Awards in the UK. Similarly, Jay Chiat has been a strong advocate of the planning concept and has also been successful in the US. In Australia, both the advertising Creativity and the advertising Effectiveness awards have been dominated by one agency, The Campaign Palace. The 'Palace' with Reg Bryson as a senior planner and the CEO is arguably Australia's strongest advocate and exemplar of the planning concept - "our cornerstone is effectiveness" (Smith, 2001, p.26).

In 1994, O'Donoghue predicted a golden age for planning. He suggested that agencies were personality led in the 80's and clients turned off. In overcoming this setback agencies have embraced the effectiveness banner. This view is supported by Crozier et al (2003) who report that despite the small size of the advertising industry the planning discipline is well established in Scotland. In particular, they note that Edinburgh has a strong focus on creative excellence. Hence it is intriguing to find that in Australia planning appears less well established. For instance, The Ad News Handbook of July-December 2002 doesn't list many planners in Australia. Furthermore, there is no equivalent in Australia of the Account Planning Group. As a discipline group account planning is silent. So what happened to account planning in

Australia? This research study looks for insights into why the planning discipline has not been more fully developed despite the rosy predictions from elsewhere.

## **The Study**

This is an exploratory study designed to guide further research efforts. The primary purpose of this study is to uncover issues related to the nature and pace of development of the account planning discipline in Australia. The study involves a review of the academic and trade literature. Additionally, a small sample of experts was interviewed in an “experience” survey approach.

To gather the primary data, depth interviews were conducted with six senior account planners at leading advertising agencies in Sydney, Australia. While Sydney is not the only major centre of leading advertising agencies in Australia, it is the largest. A case study approach suggested that selecting those agencies known to have embraced account planning would elicit more credible insights into the problems and opportunities facing the growth of the discipline. Further, all interviewees professed an extensive work background or knowledge of account planning in the UK.

Thus, semi-structured face-to-face interviews were conducted with advertising agency staff who had a senior planning role either as a Planning Director or Chief Executive Officer of the agency. A brief guide opened up the discussion as follows:

*What is your view of the role of account planners in an Australian industry context?  
How does this role compare with overseas and within your agency?  
How is the discipline of account planning developing – if at all?*

Interview length ranged from 45 to 60 minutes. All interviews were taped and translated verbatim.

## **Findings**

Insights into the planning discipline were grouped into four areas. These four areas are: (1) market factors, (2) cultural issues, (3) agency ethos and (4) superplanner. This grouping overlaps with the four factors identified by Crozier et al. (2003) that determine an agency’s approach to account planning. Crozier et al’s factors, labelled agency ethos, client type, agency size and agency location, extended Rainey’s (1997) model of account planning style. Furthermore, these areas of market factors, cultural issues and agency ethos have also been identified elsewhere as being of paramount interest. In 1987 Barry et al., reported that there was a lower degree of account planning in US agencies compared to their UK counterparts. Environmental conditions were cited as the major reason why account planning had not been more widely adopted at this point in time.

Second, cultural issues have been flagged as important. However, authors have taken different positions. While O’Donoghue suggests that foreigners can introduce new cultures more easily to the US, Barry et al (1987) argued that there was reluctance in US agencies to embrace an imported concept. Similarly, Fortini-Campbell (2001) argues that acceptance of the “uniquely British model” has been spotty in the US.

Her argument is that the British culture is one better suited to debating the merits of campaign strategy within an agency team. Whereas she finds that US agencies are more bureaucratic and hierarchical. Hence those that like to stimulate discussion and debate on the team are less welcomed in the US.

Third, agency ethos has been identified by many authors to be of considerable interest to the discussion on why agencies adopt a planning approach (e.g., Crozier et al, 2003; Pollitt, 1979; Barry et al 1987). In 1979, Stanley Pollitt emphasised the need for top management commitment to account planning. Furthermore, he stated that the philosophy had to change within the agency to accommodate getting the planning right rather than pleasing the client. In contrast, Crozier et al (2003) reported that the ethos for most Scottish agencies was based on an efficient turnaround of work and planning was kept to a minimum.

The final factor is that of the role of the account planner. Crozier et al (2003) coined the term 'super-planner' to indicate an agency person that was adept at fulfilling four separate planning roles simultaneously. In this study, the term is emphasised to indicate the impossibility of fulfilling the multiple roles required by stakeholders in Australia. Some of these roles are the consequences of the market factors operating in the Australian industry. The implications of a 'super-planner' role suggest that the job description for account planners may have become fanciful.

Having briefly identified the four major factors, each one will now be discussed in greater detail.

### **Market factors**

The most noticeable difference in planning in Australia compared to the UK, according to one Planning Director, is the economies of scale. Comparing one agency's London office that employs a minimum of 25 and 30 planners...the same number of planners were quoted by one planner in Australia as employed in the whole Sydney and Melbourne market. The implications of the lack of economy of scale are profound. One important implication is that of "specialisation" or, more correctly, non-specialisation. One Planning Director referred to this as the "Vegemite factor". With so few planners available in Australian agencies, those that are here are spread too thinly over a range of clients. In London agencies with 20 or more planners, there are specialist planners, by industry type. It is apparent that our industry cannot afford specialist planners, so planners become generalists, spread across a range of different clients and products.

However, another observation is the disproportionate number of planners in Australia, in terms of the size of our industry. Thus the ratio of planners engaged by agencies compared to other agency staff is also lower than the UK. As a result of this, the discipline has a low recognition rate amongst both agencies and clients. However, some aspects of the Australian industry appear similar to the US. Barry et al. (1987) suggest that the competitive environment is more intense in the US and hence clients need to be pleased (Rayner 1984). Time pressures thus cause clients to seek advertising solutions quickly rather than effectively. Hence, the market situation appears to mirror some aspects of the US, but again are qualitatively different.

*[In the UK and US] The budget on a brand is a lot bigger. Therefore a planner can be devoted to one piece of business. (S3)*

*Those planners come here and they have to work on more accounts. They have less time to work. Things move quicker here ...more TV stations...more commercials getting made more decisions made more quickly a lot more emphasis on the speed rather than accuracy ... There is a timetable to keep to whereas in the UK there is more of a sense of you can have the time it takes to get it right (S2)*

*We are much too volatile a market-place and change happens in this business far faster in the UK or US. For example whitegoods we have probably got double the number of brands that they have in the UK. We are a dumping ground. They are much more protected markets. (S4)*

Client demands may also be different for Australian planners. Interviewees revealed two particular instances of client demand. First many clients in Australia belong to global companies. Global firms often dictate to Australian agencies the make-up of account teams. Major global firms let the agency know whether a planner must be part of the campaign team. Second, many international agencies demanded standard advertising. At the other end of the scale, Australia has a high ratio of small businesses. Many businesses are owner operated. Hence, one planner indicated that many clients could be seduced by the glamour of the agency 'experience'. For a small factory owner it is the fun part of his business activities. Such clients may be more susceptible to the 'sales' pitch. Finally, it was observed that the average client in Australia may be less adventurous than their UK counterparts.

*I think that globalisation has had a negative effect on Australian advertising. You get clients who just want advertising that looks like the category standard. The same kinds of ads as the New York office of the multinational. (S1)*

*They aren't looking at objective criteria...everyone wants to be creative director (S4)*

Furthermore, the Australian advertising industry is undergoing a considerable change at present. Major changes have occurred in the way media planning strategy is handled, the growth of below the line or downstream activities, plus the strong growth of small freelance agencies. Furthermore, the business landscape has become more conservative and predictable according to one interviewee. This transition is resulting in a different competitive set.

*This has resulted in more convergent advertising and less creativity. Business is running a bit on remote control ... It is becoming so same (S4)*

*You have got a very strong set of researchers freelance planners in competition with agency planners (S1)*

Interviewees report that agency planners have become frustrated with being the Vegemite on toast. As a result, significant numbers are leaving agencies to establish research and planning companies. In Australia, one key difference to that of the situation in the UK is that there is a very strong group of researchers, in effect freelance planners, who operate in conjunction with agency planners. This market situation appears to be similar to the Scottish situation as reported by Crozier et al (2003). As one interviewee explained, because of the nature of the Australian industry and the trust clients give to researchers over their agency, the biggest competition is not other agency planners but rather the independent researcher/planner.

### **Cultural issues**

The second group of influencing factors falls under the umbrella term of 'cultural issues'. In particular, the dominant 'UK' influence is examined. However, this cultural influence is compounded by how well creative teams and account service people accept the planning role. According to Michell (1988) for agencies to be successful the planners role and contribution need to be understood by all stakeholders, including other agency staff. The difficulty associated with the issue of introducing a new culture to an organisation is exemplified in the following quote by Steel and Carr (1995, p.8)

*Introducing planning to an existing agency is like transplanting a new organ into a human body. If you haven't done your homework to ensure the correct match, the organ will be rejected, and the body will probably be in worse shape than it was before the operation.*

Our investigations found that planning is most revered in agencies that either have their roots in the UK, display a devotion to the UK planning model, or literally employ ex-patriot British planners. One planner joked that, to be accepted as a planner, you need to have a Pommie accent! This situation has followed the US where according to O'Donoghue (1994) UK planners were much sought after. Indeed, Rainey (1997) says that the uniquely British invention has now been exported to many countries and estimates that 200 UK trained planners are now working outside the UK. Hence the UK influence has been strong. What is not often acknowledged is that the UK influence is split in two. Both the BMP and JWT approaches to planning have arrived in Australia. However, as planners switched between agencies their commitment to one style of planning faltered.

*My view is not recreate the English ghetto which seems to be the way planning goes in most agencies (S2)*

*Most of the planners have come from the UK (S1)*

*It is not helped by the fact that most planners are Brits. Australia as you know is in a very nationalistic phase at the moment. In the past they would have been willing to use planners from London but now if you are from London it is almost a reason not to believe you ... I have been in a*

*business meeting with clients and we haven't had a single Australian on our side of the table. That is a problem for us (S1)*

*You had these two streams of completely different beasts...Both called account planner...There were some famous people amongst them from both sides...over time ... these people have moved from one agency to another...It hasn't retained that narrow character (S3)*

A further internal factor is the strength of the creative team at the agency. Both Pollitt (1979) and Steel (1998) argue that planning will only work in those agencies with very strong, talented and confident creative people able to accept other points of view and input. This aspect was acknowledged by the interviewees.

*Planners themselves particularly those that were new to the game started to learn that they needed to get on with creative departments properly (S3)*

*Our creatives have always been really clever people (S4)*

*They don't see us as the enemy...they see us as allies (S1)*

It appears that acceptance of the planning role within agencies is dependent upon the views of the creative team. Acceptance of the planner's role would be more likely in those agencies where talented creatives were doing the strategy by default and would be happy to get back to their true role.

*Success often depends on the creative department. If they feel that... there is a real value to planning we will thrive. If creatives say we are not getting anything out of this we will wither and die...If it had been the other way around the planners trying to force their stuff on creatives it wouldn't work (S2)*

A second internal factor is the resistance by account service staff to adoption of the planning role. For instance, Barry, Peterson and Todd (1987) found that that resistance in the US stemmed from the perception that planning was a threat to existing agency staff. Similar issues are evident in Australian agencies. If account service staff perceives the strategy and creative brief preparation to be the key components of their job there will likely to be dissatisfaction at relinquishing this role. The solution according to one planning director appears to turn the clock back.

*Account people have often been the most resistant in agencies to planners coming in because it is a turf battle. You are taking away the most interesting part of my job. (S2)*

*At the end of the day that is the fun part of the business (S6)*

*I think that we are going to have to do is do what we have done in the past is to try and not train an elite cadre of planners but try to improve the planning skills of the account guys (S1)*

### **Agency ethos**

The third group of influencing factors fall under the agency ethos label coined by Crozier et al (2003). Three types of agencies were detected. The first type of agency we call 'The Imposters', the second type of agency is 'The Fairweathers' and the third type is 'The True Believers'. As the labels suggest each type is categorised by their genuine level of commitment to the philosophy of account planning. In Australia, it appears that the 'True Believers' have prospered as account planners, but even within this committed group the strategies are varied.

It was evident that the reputation of the account planning function was downgraded in the early stages of its development in Australia. Many planning directors lamented the early efforts of agencies to fake the inclusion of planners to their teams. At the same time hype overestimated the value of planners without indicating the true cost of planning. It appears this was the period of 'The Imposters' and planning appears to have suffered a credibility drop as a consequence. Interviewees reported that titles simply changed overnight as account directors became planning directors and touted for new business.

*In the late 80's in the early phase of planning there was so much promise. Planners were not merchandised properly to the clients. Clients did not know what to expect...They were enormously suspicious about these people because they were not adding any value (S3)*

*It became really trendy... in 86-87... everyone jumped into planning... and that ruined planning in Australia for a quite a long time because it was just a charade (S4)*

*Just a figurehead planner who was brought into meetings... I think a lot of damage was done to the planning and the reputation of planning as a discipline by people who were in the role but were not equipped (S2)*

The next group of agencies have been called "The Fairweathers" for their opportunistic approach to planning largely based on the economic cycle. Unlike the 'Imposters' the 'Fairweathers' actually value account planning but they are pragmatic enough to recognise that clients are hard to persuade about that value. Hence, when there was an economic down turn in the market and agencies sought ways to reduce overheads the account planners were first on the list to go. In addition, it appears to have been difficult for agencies to recover lost ground as the business cycle improved, unlike the UK where planners numbers dropped after the recession and then increased. As these interviewees put it:

*The people who really lost their jobs were the planners because it had been this over promise. Clients hadn't seen the delivery because you don't affect client revenue directly (S3)*

*If you look back historically what tends to happen in the Australian industry when times are good they fill a plane full of planners from London and the US or whatever (S1)*

The third type of agency we have called 'The True Believers' and in the Australian jargon are 'true blues'. In terms of commitment to the philosophy and practice of account planning they hang in there as this exchange highlights:

*We are probably the only agency that has stuck with planning through thick and thin (S4)*

Furthermore these few agencies have an evangelical zeal about the discipline and are at the core of promoting the profession of account planning. One reason advocated for the lack of agencies committed to planning is this lack of evangelicals:

*I suppose you could argue that at the early stages of account planning in the UK there weren't that many planners...what was different I think that maybe some evangelical individuals (S2)*

*Today, [the CEO advocate of the planning discipline mentioned earlier] is the doyen of planners in this country (S3)*

However, not all 'true blues' took the same path. In some agencies UK imports attempted to build a local agency through training unqualified planners. Other agencies have adopted a more ruthless policy of hiring senior persons.

*He spent a lot of time in trying to move agencies towards the London model and he has done a lot to try and recreate a London model here. Having a critical mass of Australian planners who are valued by clients, and creating a self sustaining cottage industry (S1)*

*We have never been a training agency. We have never had juniors. We have always hired very senior people. In fact there is an old t-shirt an old slogan of the palace there is no shallow end (S4)*

*My ambition was to be the last British planning director in Sydney and I said I am going to recruit a team. We'll train them. For a while there it was great I had a pretty good team of Aussies but you see once you have trained them they can take to London or New York...So that didn't really work out. Now I have given up on that ambition (S1)*

However, two further issues were uncovered that could indicate the reluctance for some agencies to adopt a strong planning culture. This decision to take a strong philosophical position creates some difficult problems. First, a decision to stand out creatively means that people will notice your work and if it is not good they will notice that. While convergent category advertising will neither stand out nor be blamed for failing. In a conservative market place this could be business suicide for the unwary.

*If you demand to stand out you had better be right (S4)*

A second dilemma arises for the agency that has built a large reputation on using planning in the campaign strategy development process. Once you have said to clients

over a period of time that it is essential to use planners (and for clients to pay for that planning) and ipso facto a lack of planning produces poor work, you are locked into a position as this exchange shows:

*You can't start just compromising and doing crap work for clients because you then won't have a position (S4)*

### **Super-planner**

While Crozier et al (2003) envisaged an ideal account planner as one that could handle four difficult roles it was found that Australian account planners face an impossible task. Without adequate resources both Steel (1998) and Pollitt (1979) asserted that successful planning could not be achieved. Furthermore, Steel (1998) stated that planners require command of the data and consequently you cannot work on a lot of different businesses. However this is not the case in Australia.

*Here you are very much a generalist (S4)*

*Here we are stretched (S3)*

As Crozier et al (2003) points out planners require multiple skills. However, the level of some of these skills is disproportionately high. For instance, one planning director commented how the planner must be someone that others seek to work with rather than just having sound interpersonal skills. This is a big challenge to recruit such persons. In addition, the nature of the Australian environment required planners to be knowledgeable about the Australian consumer plus understanding the way Australian business operated and further understanding how advertising worked in Australia. The degree of skills development required is evident in the following exchanges:

*Diplomatic skills of the highest order are a prerequisite for the job (S1)*

*It was almost like the octopus model. That it wasn't just one speciality. There were higher demands on the planner (S4)*

*It is a rare combination of factors (S2)*

At the same time as this super-planner was hard at work, attacks were made to his self-esteem. Several interviewees commented on the lower level of status and respect accorded planners in Australia. This lack of regard was further demonstrated through the recognition that clients were more than happy to pay for research than pay an agency for planning. It was felt to be an issue of trust. Other interviewees felt frustrated at dealing with junior staff of clients. Finally, one planner also vented his frustration at the lack of a planning community.

*The Australian planning community is not really a community. Just a bunch of disparate people who have their own agendas and do their own things (S6)*

*They have less status (S2)*

The final comment is reserved for one interviewee who perhaps summed up the state of the discipline in Australia. While most comments were positive overall one cannot help but be intrigued that account planning in Australia has not taken off. The fit between realistic planning skills and the agency environment is not close. Perhaps this following comment from one planner gets to the nub of the problem which is that any strategic fit between environment and resources must be timely:

*It has missed its time (S1)*

## **Conclusion**

This exploratory study has sought insights into how account planning has evolved in the Australian context. In the process we have uncovered a range of issues related to the nature and pace of development of the account planning discipline in Australia. These preliminary findings will be used to guide further research efforts into the account planning discipline in Australia and hence no firm conclusions are drawn at this point. However, we draw together the following comments as a brief summary of some of the key issues facing the discipline.

First, like Barry et al (1987) environmental conditions are likely to be a major factor to explain why account planning had not been more widely adopted at this point in time in Australia. However, unlike the rosy predictions of O'Donoghue (1994) there is no evidence to suggest that the discipline of account planning in Australia will find its place over time. Both the scale and nature of the Australian market place does not lend itself to a discipline that requires an in-depth command of the domain. Second, the imported UK model has failed to transplant itself in Australia. Apart from a handful of 'true believers' account planning has been driven by agencies with little commitment to the role. Hence, Pollitt's (1979) premise of the need for total commitment has not been met. Finally, Crozier et al's (2003) notion of a 'super-planner' role underestimates the difficulties facing 'traditional' planners in Australia. This difficulty suggests that agencies will be wary about adopting the fully fledged planning role both now and in the future.

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