



WARC

The future
of strategy

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Themes from this report

1

Strategy's influence has been growing

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

2

Fragmentation is a major challenge for the future

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

3

'Upstream' opportunities; 'downstream' pressure

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

4

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

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

Executive Summary

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

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

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

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

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

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

Executive Summary (continued)

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

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

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

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

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

A majority (53%) of respondents to

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

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

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

A note on the methodology

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

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

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

Expert commentaries in this report



Murray Streets

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



Guy Murphy

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



Tom Morton

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



Anthony Wong

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



Bediz Eker

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



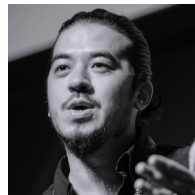
Mark Tomblin

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



Gareth Kay,

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



Andreas Krasser

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



Sue Unerman

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



Bridget Angear

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



Suzanne Powers

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

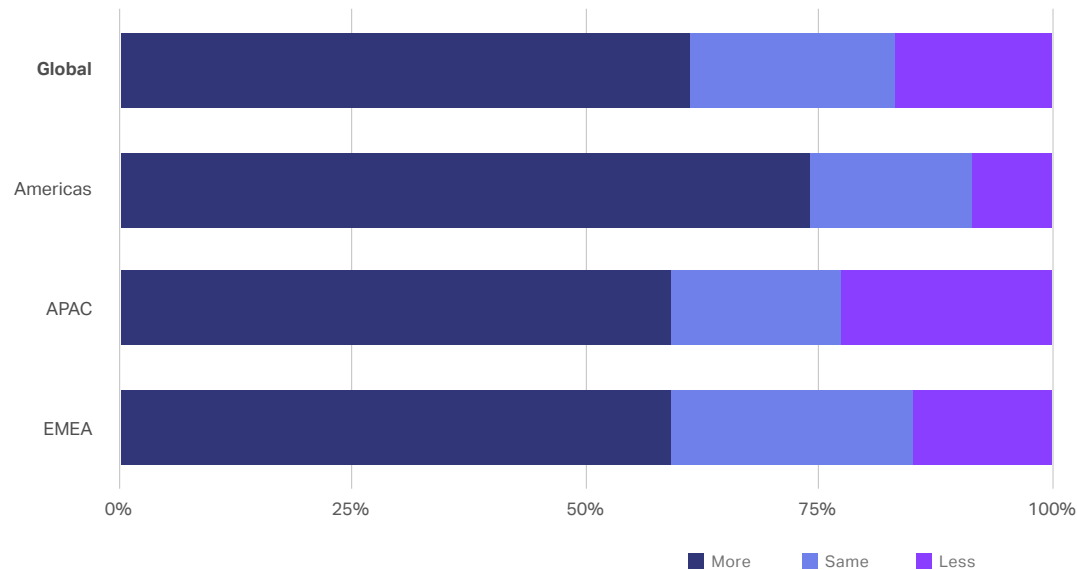


Craig Adams

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

Strategists are gaining influence within agencies

Do you have more or less influence within the agency?



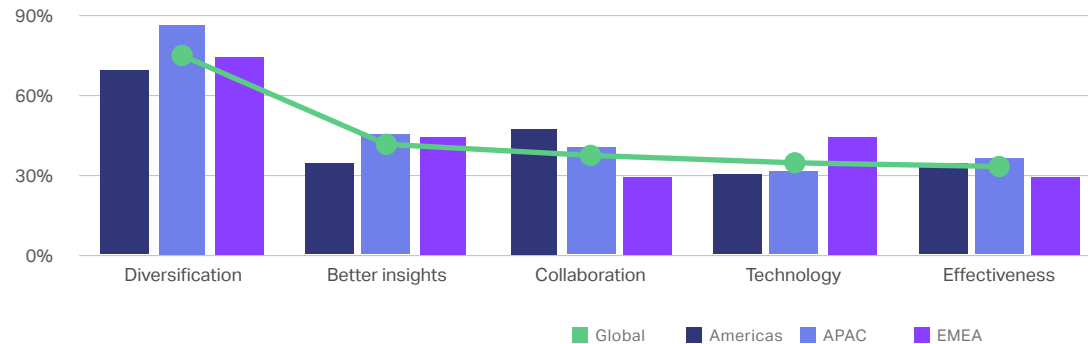
Question: Compared with the recent past, do you feel that the planning/strategic function has more or less influence in the agency?

Commentary

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

Strategists are looking beyond campaign planning

What are the biggest future opportunities for strategists?



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

Respondents could choose up to 3

Commentary

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

Why planners need to break the chains of specialisation



Gareth Kay,
Co-Founder, Chapter SF

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

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

How do we get to this future? I've

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

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

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

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

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

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

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

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

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

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

Yet increasingly we are being

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

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

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

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

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

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

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

How strategists can move 'upstream'



**Bridget Angear, Joint Chief
Strategy Officer, AMV BBDO**

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

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

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

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

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

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

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

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

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

This all means that, as an agency,

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

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

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

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

Three skills to look for when hiring a planner



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

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

Great planners need to ask the right questions that help narrow

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

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

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

Core skill #1 – Derive attitudinal and behavioural insights

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

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

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

Core skill #2 – Craft experience briefs

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

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

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

Core skill #3 – Provide real-time strategic counsel

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

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

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

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



A COPY OF THE FULL

Future of Strategy Report

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Case Finder

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Contact Us

London
85 Newman Street
London
W1T 3EU
United Kingdom
+44 (0) 20 7467 8100
enquiries@warc.com

Washington DC
2233 Wisconsin Ave NW
Suite 535
Washington, DC 20007
United States
+1 202 778 0680
americas@warc.com

Singapore
20A Teck Lim Road
Singapore
088391
+65 3157 6200
asiapacific@warc.com

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