Open Planning is set to revolutionise marketing communications

Between the idea

And the reality

Between the motion

And the act

Falls the shadow

TS Eliot, The Hollow Men (1925)

Why read this?

Because

One change

will transform

your marketing

TS Eliot's bitter evocation of the challenge of realising human aspirations is painfully relevant to marketers Given so many brilliant minds, so much human empathy, so much skill, why is marketing communication so fragmented it is planned in silos? And even when planning gets the parties together, why is evaluation across the mix so difficult? How do you cross the performance threshold to truly joined up marketing? This paper, based on research by the Centre for Integrated Marketing, provides a simple yet profound solution. It also explains why we have not solved the problem before and describes a sample tool, CODAR, that does.

Once you get past the really big issues – mass poverty, brutal regimes and environmental pillage (and of course we haven't yet) – the challenges of human life and society concern finding meaning, value, entertainment and sustenance. That is our business.

As marketers we are engaged in a powerful and significant act: creating and communicating value and worth. Brands matter when they matter – and many of them matter a great deal to many people.

An ad, a product and service all communicate and are as effective as the value they communicate. Together they are the media of our craft.

Marketing communication is therefore not restricted to stuff in 'media', the conventional advertising mix. Rather, everything that conveys a message is a medium.

This involves engaging everyone and everything: from designers to process managers to frontline, from strategic positioning to product and service policy, from induction to performance evaluation, from TV to telephone, packaging to web. For example, Innocent has been outstandingly successful in developing its pure drinks brand on the strength of superb packaging, retail channel management and product innovation, with conventional advertising a late and modest follower. Indeed, its 'advertising' often takes the form of innovative "Innocent" activities, such as sponsoring local councils to open more cycle lanes. British Gas is investing heavily in human culture and CRM systems and processes to support and enable broadcast advertising. Guidant, the leading medical technology firm, is training its managers in coaching skills to empower its frontline staff. Duchy Originals sees its engagement with product development and production partners as crucial to maintaining its 'originality' and brand success. Meanwhile Coke maintains its lead less by product innovation than by superb advertising and distribution management.

Nothing could therefore be more important than tools that enable effective communication planning and evaluation across the entire channel spectrum, whatever the mix that belongs to the strengths of the brand.

The search for tools

Good marketers know this. Indeed research shows that enhancing marketing communications planning and evaluation is one of the most important themes

on the minds of senior marketers on both the client and agency side. Under a variety of labels including integrated communication planning, total communications, media or channel neutral planning, and 360 degree branding, companies have been trying to develop tools and methods to enable genuinely effective optimisation and accurate evaluation across the communications mix. This push is driven not only by the negative problems of media fragmentation and communications clutter but also by positive aspirations. Marketers want marketing integration and realisation of media and discipline-multiplier effects as well as efficiency gains from effectively harmonised, mixed-media communications planning.

These aspirations and tools do enable us to do some things well (if we want). For example:

- We know we need to be business focused. So supermarkets look at the ROI of store refits, brand TV, regional press and so on. Leading consultancies, such as ATG, and agencies and brands like Tesco develop econometric models that show relationships between spend and sales. For example, Cheltenham and Gloucester assessed cricket sponsorship versus TV spend. Having said that, recent research by the Centre for Integrated Marketing[1] suggests that evaluation is managed as a learning discipline in only 19% of large UK firms, leaving some room for improvement.
- We know we need to understand our customers/audiences (we often don't but we could). For example Sainsbury and SEEBOARD Energy have developed detailed typologies of their customers. However, the same research by the Centre suggests that quality information about customers for all who need it is provided in less than 10% of large UK companies.
- We know we need to understand customer experience and redesign to enhance value, so we have developed tools such as Stepping Stones' Touchpoints and Clover Leaf that show the business effect of enhanced customer value. However, the research by the Centre suggests that only 31% of large companies are good at realising high value propositions

from idea to implementation, while the alignment of business processes to the brand value position is only strongly achieved in about 19% of large UK companies.

- We know the quality of commitment or loyalty determines value and have excellent tools like WPP's BrandZ and Research Survey's Commitment model that quantify these and their effects to inform planning for both one-to-one and broadcast advertising.

- We know we then need to tailor communications according to the type of relationship. For example Diageo uses the (Rejectors), Availables, Acceptors, Adopters and Adorers model to plan communication while MindShare uses 3D to plan around Familiarity, Consideration, Delivery, Preference and Commitment. However, the Centre's research suggests that treating customers in ways appropriate to them is strongly achieved by less than 40% of large UK companies, with less than 10% being effective in recognising customers wherever they interact with the brand.

- We know that we need big, media neutral ideas, such as Mini's 'Mini Adventure', to give coherence to integrated communications, and have good skills in developing these, even if only some 30% of UK companies are really successful in implementing the practice.

- We know we need to understand media consumption and contact effectiveness. So we use diary studies or insights techniques such as Integration's MCA or Carat's Cognitive Tracking to assess the way they work and their relative impact.

- We know we need to mix our media effectively, so tools like MindShare's AdMix help to select the best mix according to the criteria given.

And competent marketers and their agencies can point to positive ROI, brand results and effective work, although our research at the Centre suggests that less than 40% of customers of large UK companies are really happy with the brand experience.

So, while we need to use these and other techniques better, at least we have these skills and tools. Yet, in one key area, we still don't even have good enough tools or thinking.

Despite many innovations, there remain significant and widely acknowledged problems in planning and evaluating harmonised and optimised collaboration across the full scope of communications channels. Present tools do not create an open and level playing field during planning, limit creative execution and severely hamper cross-channel evaluation.

Every intelligent marketer is aware of this genuinely difficult challenge as well as the current problem, which is probably contributing to the way marketers are losing their places in boardrooms (8 in the FTSE 100 according to the CIM's recent survey) and in their relative pay scales (senior marketers earn less than most of their senior peers today, a reversal of the previous generation). Our estimate is that failure to solve this effectively is costing UK industry some £4 billion to £10 billion a year.

A consensus is emerging that this is caused by how we think about planning marketing communication. Our research shows that the failure derives from a simple mistake that has become the adopted standard.

That's a bold statement to make, especially with so many fine minds having spent so long thinking about getting it right. Yet I think there is very considerable support for this, especially amongst the smart thinkers. We have spoken recently to senior marketers at companies like IBM, MindShare, Levi Strauss, and NSPCC who share this conviction. The Centre for Integrated Marketing also led the MNP Best Practice Group of senior marketers [2] on a 15 month research project whose recent findings endorse this (www.openplanning.org). As in most great intellectual breakthroughs, the community becomes conscious that it's beating its head against an old problem until an insight appears: "You are the problem!" Not you personally – but the habits that are built into education, into practice, into awards, and into industry structure. It's painful to realise but exciting to respond.

One significant and simple change can therefore revolutionise marketing effectiveness. And it is important to say that a based on observing reality, not theory. An example from the sales world puts in context the effect of observing reality.

> In the 1970's a UK behavioural research firm called Huthwaite Research was asked to research sales performance. In an intensive study they observed 'excellent sales people' coding what they actually did. It was found that high performers did not follow the theory. Indeed, their own natural behaviour was even different from what they were advising junior sales people to do. Theory, training and management metrics were misaligned to best practice. Huthwaite's revolutionary model, SPIN, is now used worldwide supporting billions of dollars of sales.

In a similar way, practitioners will find that adopting the proposals in this paper simply means adopting what the best marketers do naturally in their best work, even when they think differently.

The problem is fragmented, simplistic objectives

Here is the classic approach to communication planning:

1.   Identify a range of objectives, typically divided into attitudinal and behavioural, such as column inches, awareness, consideration, leads, conversations and redemptions (that are intended to add up to market share and profitability).
2.   Decide which media/channels are good at which. (There are many techniques for this).
3.   Factor media/channel costs and reach.
4.   Build optimisation tools (or just use expert experience) to select the media/channels for each of the objectives.
5.   Execute.
6.   Evaluate the media (and creative) against the objectives.

Actually, as we will see, this is a frustrating nonsense.

The practice of decomposing communication goals into a series of specific narrow objectives and then identifying a relevant discipline/media combination (or channel) to achieve each, as in Figure 1 below, is highly convenient. Unfortunately, it does not comply with reality, however much research might seem to prove it true.

Objective 1
Awareness

Objective x
Leads

Objective y
Sales

Optimise mix

Optimise mix

Optimise mix

Media
For
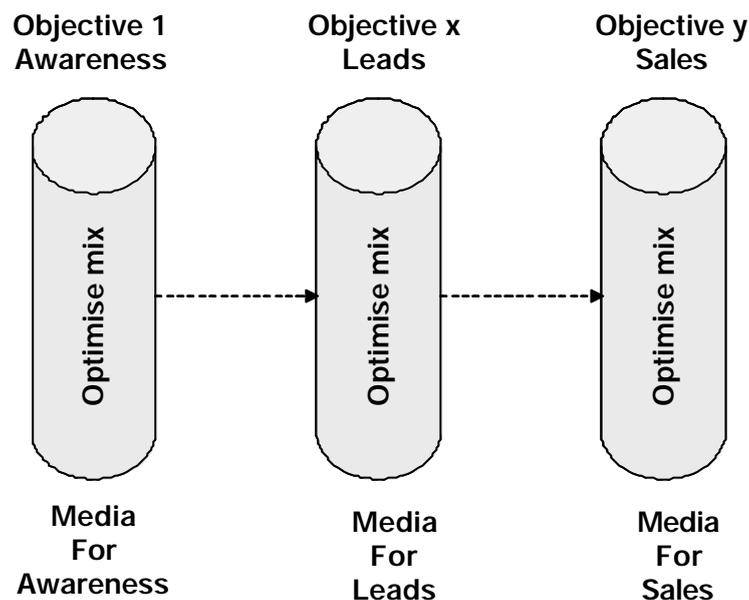Awareness

Media
For
Leads

Media
For
Sales

Figure 1: Divided objectives with divided solutions

For example, VW Passat reported that over the course of some 5 years of building the brand, TV was assigned the responsibility of building positive awareness while direct mail was used to inform (brochures) or generate leads. Research did prove that TV was affecting awareness and attitudes and direct marketing was producing responses and leads. Their own econometric analysis however shows that this neat division told only part of the story. Instead, each element actually provided a diversity of benefits. For example, TV advertising was closely correlated not only with awareness/attitudes but also with sales.

Similarly, Boots found that mail was not only effective in building sales during new product launches but that is could be more effective than TV in building brand attitudes.

Like VW, major brands recognised for their excellence, including Sainsbury's, Royal Bank of Scotland, IBM, NSPCC and Ford, have reported to us that they frequently evaluate TV, Radio and Press advertising by selected awareness/brand attitude factors while measuring mail, DRTV, web, SMS and other communications by responses. This is not surprising since it is assumed good practice in the industry and even by academics.

Whether the division is between "rational" and "emotional", or between "soft" and "hard" (e.g. awareness and responses, redemptions, click-throughs or leads), such thinking assigns a monotelic ("single goaled") function to communication that clearly misses reality.

Such thinking derives partly from the tendency of the different disciplines and media to promote their USP, which leads to a gravitation towards simplified and fragmented objectives. For example, direct marketing has since the 1980's promoted its 'accountability'. Consequently major brands, including (from our research) charities, supermarkets, technology firms, mobile phone operators and car/auto manufacturers, spend millions of pounds on direct marketing without evaluating the qualitative brand effects, while similarly spending millions on advertising in television and other media that is evaluated largely on qualitative dimensions (such as 'awareness').

Yes, it takes very little consideration to realise that communications do not have such limited, simplistic effects. For example, all communication not only affects how people think, feel and their intentions, but also that it *should* do so is obviously intended by planners and brand managers, whether or not measured or made explicit. This has been acknowledged for decades, and is commonly featured in creative briefs, for example those of Partners Andrews Aldridge and Ogilvy, which ask how the communication is expected to affect how the recipient will think, feel and behave.

Take these examples from our research:

- **The IDM 2003 members' invitation to its Christmas party (in the form of a personalised Christmas card) was an important revenue generator; so there is a strong response objective in the design. However, it was also an important relationship building tool, even for those who don't come, while the innovative use of personalisation in the cover illustration is an interesting idea for its members while helping to position the IDM as a direct thought leader. NSPCC sponsorship and co-branding reaffirmed brand values.**
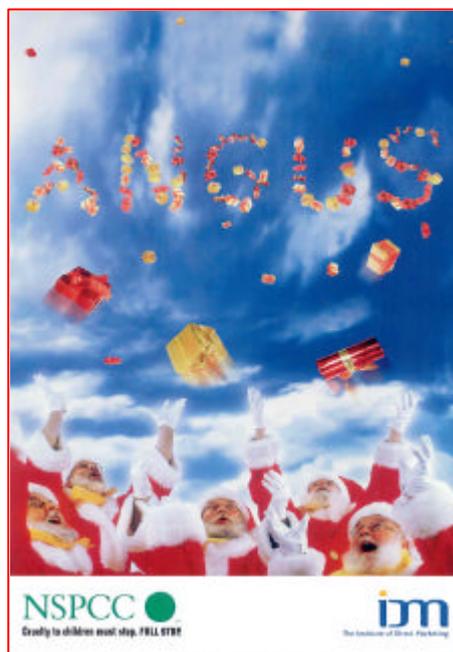

Figure 2: The IDM Christmas mailing 2003 had multiple objectives[3]

- **A Rotterdam School of Management study on experience marketing**[6] **describes retailer Lush as follows:** *"As you walk along the street where there is a Lush shop you start smelling the fragrances from far; but since the exotic, fragrant scents do not belong to an urban landscape, your senses are alerted. As you pass by the window you realize that this is the source of the pleasant scent diffusing onto the street. And, you are naturally led to enter the shop"*. **Scent is here a response generation**

device (just as some direct mailers have added scent to mail packs), but it is also creating awareness, brand values, relationship, helping the consumer to understand and experience the positioning and product. This complex performance adds up to a very clear message though, as do the product designs, in-store experience and the website[4].

- The SEEBOARD Energy TV ads by archibald ingall stretton for its 2002 award-winning 'Where does it all come from?' programme were designed to reposition SEEBOARD Energy as a place with innovative people who care about customers. But of course the purpose of doing so was to build stronger relationships and emotional loyalty by giving them an imaginative experience of what SEEBOARD Energy was like, while also stemming the haemorrhage of customers then taking place and encouraging positive choice. It was also intended to overcome staff morale problems and build their involvement and understanding (more than 200 took part in the first ad alone). This is reflected in the CODAR Signature chart below (which is explained in more detail later).
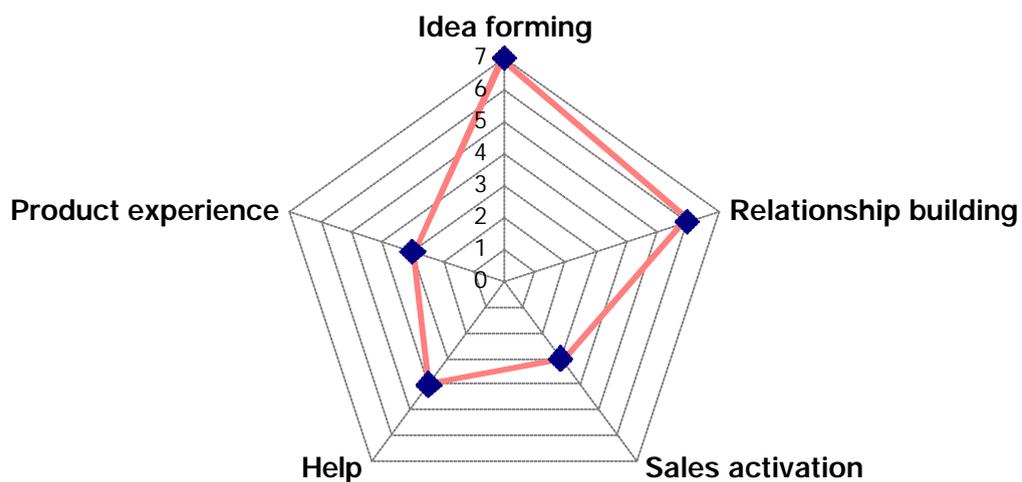
SEEBOARD CODAR Signature - TV

Figure 3: SEEBOARD Energy TV objectives

To conclude, in one research forum I moderated (marketing directors of very blue chip brands), one marketing director commented on how mail is 'rational', not 'emotive'. Inspired by the presence of the marketing director of American Express, I then asked him if he was an Amex card member, and if so what had brought him to the brand. He could still remember the famous Amex mail pack and its emotional promise. How often we operate on heuristics that our own experience actually disproves. Here was a marketer who was commissioning work to achieve narrow objectives because he believed that was all it could do when his own experience thoroughly disproved it.

Nothing to do with 'single-minded propositions'

Proposing that communication objectives are multi-dimensional or polytelic has nothing to do with the notion of 'single minded propositions' nor with the creative dictum, "Don't ask the customer to do two things".

"I love you" is a simple, single statement, but it arouses a complex range of effects. "I love you, please marry me" asks for just one action but asks the loved one to believe and feel as well as act.

Creative practice thus still needs to distil polytelic objectives into effective creative ideas and executions. Recognising and appreciating the full creative challenge is simply more empowering than measuring on one dimension only.

And even if it were not, even if it were just a harder challenge, it is one we need creatives to make, as the progress of direct marketing from a "response only" mission in the 80's and early 90's to today's "response plus brand" mission[5] demonstrates. Years ago, David Ogilvy coined the dictum about his company's advertising: "We well or else". Attitude is not enough.

The effect in practice

There are a number of important consequences of the current model:

- *Full potential is not exploited*

  The full potential of the different media and disciplines may not be exploited even when used. If the creative or management team are not expected to achieve a communication objective, they are less likely to do so. For example, a TV ad that is focused on creating awareness of itself may not build brand equity and sales. Direct marketing creatives have historically not been sufficiently tested on brand or 'emotional' communication. This means less effective work.

- *Appropriate media and disciplines may not be used*

  Because the media and disciplines are labelled with a narrow range of competencies, some may not be used at all. For example, Boots surprised itself when it tested mail and found it outperformed TV in creating awareness and significantly enhanced a range of brand attitudes. (There are some parallels with prejudices about people here). This means that more efficient and/or effective methods may be overlooked, as Boots had effectively done prior to the test.

- *Communication objectives are less well defined*

  If the planning parameters are simplistic, then the plan will be simplistic if they are smart, the plan is more likely to be smart.

- *Learning will be reduced*

  At least some of the actual effects are commonly off the radar chart, hence are not noticed or examined. The example of VW, a multi-award-winning series of projects that failed to appreciate the full potential of TV for over 5 years is just one example. AOL could have enhanced its mailing programme.

- *Optimisation of the mix is reduced*

  Each type of objective is treated separately and assigned its own budget and methods. Therefore synergy effects (for both cost savings and higher investment) will be overlooked. Furthermore, since it is difficult or impossible to compare efficiency and effectiveness on a like for like basis, the evidence for optimisation is lacking.

- *Lower budgets are likely to be assigned*

  Because the objectives are de-scoped, so will be the financial justification. This weakens the marketing team and damages the brand.

- *Organisation wide planning and evaluation less effective*
  Different parts of the organisation plan on different bases making organisation wide planning and evaluation difficult or ineffective. For example, PR, the sales force, call centre and service operations may operate on independent and incompatible criteria.

- *Media optimisation tools are sub-optimised*
  For media to be included in an optimisation tool they have to be classified. Hence the effectiveness of the classification is central to the optimisation econometrics. Yet the point is that current classifications are sub-optimal.

- *Benchmarking is difficult*
  Benchmarking tools are hard to design and will tend to reinforce the present mindset if they use inconsistent criteria.

- *Communication's business effects not understood*
  It is extremely hard to build an effective planning model that relates communication results to business goals. A model can be created which shows the correlation between constructs such as awareness, consideration, loyalty, responses and satisfaction and business goals such as profitability and market share. Such a model is clearly important for both marketing strategy and building the business case for budgets. However it will be inherently flawed because of the discontinuity between strategy and tactics and the biases that are likely to appear in research.

- *Research insights are likely to be sub-optimised*
  The ideal research plan seamlessly connects to the communication planning process and then on to evaluation. The discontinuities and inconsistencies in planning and evaluation are likely to weaken the research brief and the potential of research companies. As a point of detail, we predict that more overall research/evaluation budget is likely to be allocated leading to better insights and lower overall costs per unit of success.

- *Marketing function is compartmentalised and sub-optimised*
  Compartmentalisation leads to specialist expertise but also to sub-optimisation. There will be a tendency for practitioners to become

'mono-lingual' rather than multi-skilled, focusing too much on the differences and not enough on the universalities of communications. It will look efficient – with advertising, direct marketing, PR and so on each doing its bit, but skills and a common language for learning, discussing and comparing will be lost.

- *Sub-optimised marketing agencies and agency relationships*
  This will all be replicated into the agency structures, cultures and missions. It enforces a sense of a pecking order and makes it harder to brief all parties – including for example internal groups – with a common and consistent framework. This will tend to reduce collaborative effort and understanding.

- *Operational efficiency may also be affected*
  This is harder to estimate because the simplistic nature of the current model does have some benefits. However, this may be more than outweighed by another negative.

- *Lack of end-to-end planning framework*
  Finally, integrated communication planning needs a continuous and consistent planning framework from top (positioning, strategy, overall goals) to bottom (individual 'tactics'), especially on large international projects. The absence of such a framework can affect implementation and certainly evaluation.

Given these observations and the subsequent gearing effects on customer equity, it is not surprising that we estimate a typical 10-25% performance enhancement opportunity for UK brands. If excellence like VW, NSPCC and IBM could be enhanced, then yours probably can too.

It is ironic that so many awards and award bodies not only fail to take notice of these factors, but often even reinforce them with awards based on narrow performance criteria.

So why do we do it?

One reason has already been given: history, and the competition amongst marketing service communities.

There is a second reason: the present system has a certain attractive elegance about it. No system or mental model survives long without having something positive.

Why it is so attractive? It is because people like to be able to pigeonhole things. It makes life easier. That's after all the essence of positioning – getting yourself pigeonholed as #1.

It is very attractive and convenient to identify the different stages in a customer journey (awareness, consideration, leads, sales etc) and assign people and channels to each. Everybody knows their job and the job of everybody is known. If it really worked it would be fine.

> Football is a good analogy. A manager sets up a team structure and even employs strikers, midfield players, backs and a goalie. But forwards also defend and defenders score goals, while midfield players do both. In the competitive world of football no manager could afford to play a team that stuck to its roles.

Similarly, consider the communication congestion and the competitiveness of the brand world. No marketer can afford not to chase optimisation – which often means breaking rules or at least innovating. It certainly means making full use of all the players.

How to solve the problem: Open Tools

Paradoxically, the fact that our *actual* communication objectives are multi-dimensional ('polytelic'), as we routinely observe, could make life a lot easier for us.

A lot of the complexity in today's planning model is that we are trying to force something that doesn't fit. If we start with what works and corresponds with reality, life becomes much easier.

In the balance of the paper I want to describe how to make planning work harder and better using Open Tools, illustrating with one tool, CODAR, that the Centre for Integrated Marketing and I have been involved in developing.

Marketers have been asking the industry to provide a simple practical method that enables us to:

- Begin with the people we are communicating with, including any and all stakeholders/communities
- Plan from the highest strategic levels of brand positioning to the fine detail of a banner, mail pack insert or phone script with a single technique.
- Plan, optimise and brief across anything that communicates: a store, a product, TV, mail, sponsorship, PR etc. treating each genuinely on its merits in a way that stimulates maximum creativity.
- And then (after execution) evaluate communication and business effectiveness and efficiency using common currencies across/through it all

We describe this as an "Open Tool", and this is a key element of Open Planning. Despite its obvious benefits, there is a need for some courage. Tony Regan and Marie Louise Neill in their excellent chapter on Evaluation for APG's guide to media neutral planning[6] argue that:

"1. The desire to plan neutrally is often handicapped by the ongoing influence of established evaluation tools.
"2. It is intellectually challenging to be clear thinking about your brand, defining what you want to know from evaluation. Too little time is spent on defining objectives….
"3. It is almost impossible for an individual marketer to dismantle existing systems of evaluation."

Fortunately, fortune favours the brave. Open Tool architecture provides a system for planning, managing and evaluating that optimises communication.

Effectively, Open Tool architecture overcomes the difficulties I have been describing by meeting the following needs:

- It should be simple, yet rigorous: enabling you to get to more profound insights about communication objectives and how they will contribute to more sales and to brand and customer equity. For example, enabling more effective and rigorous discussion and debate about what the communication objectives should be and how they will contribute to brand and customer equity.

- Covering every aspect of the customer or other stakeholders' interactions with the brand, across all media/Touchpoints in any kind of communication by any skill group. For example, supporting internal briefing for internal communication centres, such as call centres, service personnel and sales people, while also working for the ad or PR agency.

- Improving the precision of the brief while enhancing the creative space and opportunity, enabling more 'creatively effective' and more efficient solutions.

- Adaptable to all kinds of working situation and levels of application. For example enhancing a conversation in the corridor, a workshop, electronic briefing, econometric database(s), optimisation tools and knowledge management system(s), working both hi-tech and lo-tech.

- Specifically enabling channel optimisation tools to support planning.

- Easy to connect it to existing tools, supporting an upgrade path for current systems.

- Providing a clear brief for research that is also easy to translate into a research instrument for planning and evaluation. (Ideally it should even work as a research library organisation tool, since research should be accessible according to planning criteria.)

- Enabling a corporate-wide performance database for econometric analysis that provides genuine common currency accountability, learning and insight.

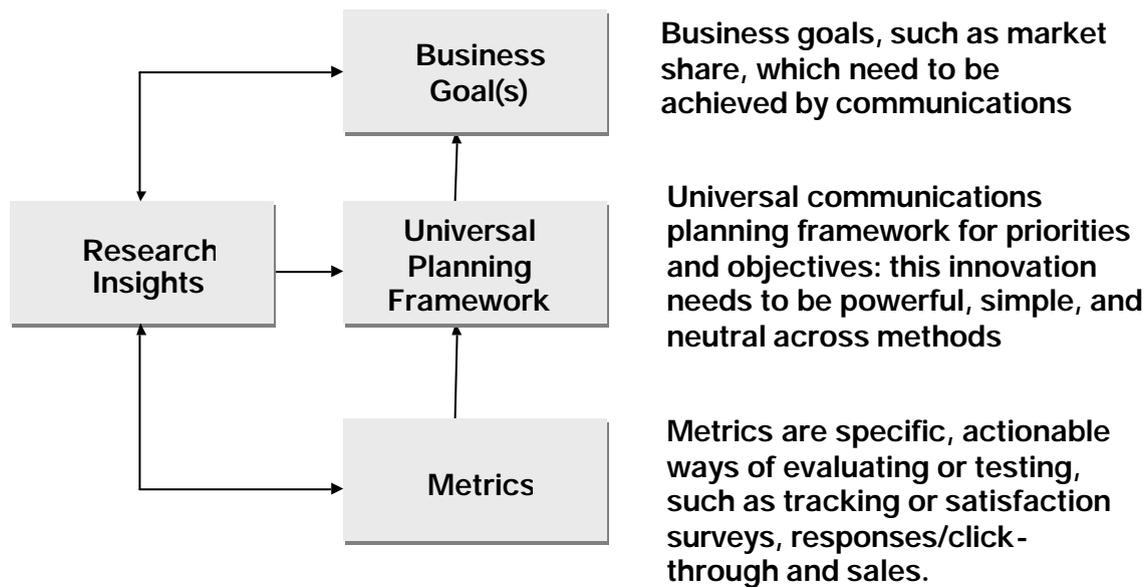The way this is done is actually straightforward, as illustrated in Figure 4 below.

Business Goal(s)	Business goals, such as market share, which need to be achieved by communications
Universal Planning Framework	Universal communications planning framework for priorities and objectives: this innovation needs to be powerful, simple, and neutral across methods
Metrics	Metrics are specific, actionable ways of evaluating or testing, such as tracking or satisfaction surveys, responses/click-through and sales.

Figure 4: Open Tool architecture

Specifically, our research pointed to the need for the following architecture:

1. Clarity about business goals. Designed to achieve overall business-related goals, such as market share, brand equity or customer equity, but focused on the communication recipient/customer: proceeding from audience/individual needs to identify desirable post-communication effects.

2. Supporting complex integrated programmes. A hierarchical but fractal communication planning structure with master communication objectives and multilevel subsidiary communication objectives and activities (e.g. to different customer communities, with a range of channels, and changing over time).

3. Common currency communication priorities and objectives, specified for each communication activity, from master plan to the lowest level communication activity, based on a unified framework of planning dimensions. In each case, planning uses the same set of planning dimensions, clarifying varied priorities across the mix as well as specific objectives. This facility is at the heart of the Open Tool architecture and needs a profound model to be effective.

4. **Practical metrics.** A set of measurable objectives for each planning dimension defining what constitutes 100% successful accomplishment. These should be defined in numeric terms so that they are suitable for the type of communication and are practical in terms of obtaining results. More than one objective should be possible, with different elements weighted.

5. **Automated programme scoring.** A defined relationship between lower and higher-level communication activities, so that the contribution of each communication activity to the overall plan is clear and can subsequently be scored automatically if required. Examples include the planned contribution of a particular press ad in a particular newspaper (on a particular day). Both over and underperformance should be meaningful and contribution should be normalised against budget.

6. **Benchmarking.** Communication plans held in a database as a by-product of the briefing process and subsequently updated by actual performance (whether derived from research, estimates or CRM/POS systems), triggering performance scores. This database becomes an econometric and benchmarking tool enabling comparison of different methods, markets, groups, products etc, even internationally. Comparison by agencies or research groups can also be made across clients and used for benchmarking (subject to confidentiality guidelines).

7. **Media/channel optimisation.** Initial assumptions or research can be fed into planning tools using Delphi and other decision-making methods. As data is accumulated, channel optimisation tools will be refined with actual performance.

8. **Knowledge management.** The facility to enable all communication projects/briefs/cases to be coded so that they can also form the basis of a knowledge management system and facilitate retrieval and comparison based on 'similar projects', even internationally.

As indicated above, the core of the system is the ability to prioritise across a powerful framework of communication objectives. In the case of CODAR this is known as the CODAR Signature for the project. Adopting this method [7]enables the simple change proposed in this paper.

Illustrating the Principle: CODAR

CODAR is an example that was designed to meet these criteria after these problems had been identified. The Media Neutral Planning Best Practice Group recently identified it as a unique tool (see www.openplanning.org).

The CODAR design enables all marketing communication activity to be planned and evaluated using the same core framework and with a common currency. This is effective across the full range of communication channels. According to users it provides competitive advantage, enhancing planning and creative potential and encouraging collaboration and learning, enabling even complex integrated projects to be designed and evaluated seamlessly. For example, IBM used it to develop objectives for a global relationship management programme. CODAR also supports accountability, which was a key motivation for the IBM project, and knowledge management, which is particularly relevant to large client and agency groups.

The CODAR design deploys a framework of five dynamic and inter-dependent planning dimensions, which form the 'signature' for any communication, to plan and evaluate any communication. The dimensions are based on sound insights into people, marketing communication, and planning and evaluation methodology and draws on decades of marketing communication practice and psychological theory. It is people and communication, not media or discipline-based. Users find the framework simple but powerful, rigorous and creative.
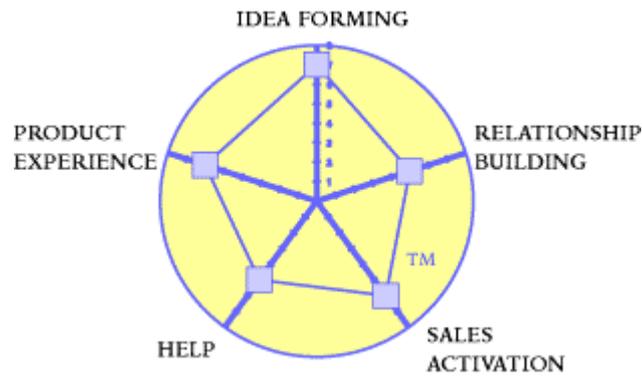
CODAR's five dimensions are:

Figure 5: CODAR signature dimensions

1. **Idea forming**

   The communicator's objective is to influence the ideas, associations and thinking of the communication recipient, for example about the brand or a particular project or product. This is of course a standard objective.

1. **Relationship building: creating emotional connection**

   The objective is to get the communication recipient to feel him or herself connected through some form of relationship with the brand or its representatives. Examples might be feeling affinity with the values of the brand or culture, trust and appreciation, feeling valued through being personally recognised and appreciated, knowing representatives of the brand and valuing relationships with them, belonging to some privileged or special group, and involving the brand and its products more in everyday life.

2. **Activation**

   The objective is to get an intentional or behavioural change by the communication recipient, for example sales activation, sales enquiry or commitment to behaviour change. This is therefore a classic of marketing communication.

3. **Help**

   The objective is providing required and perceived help, service or support to the communication recipient, for example in the form of information about a product or policy or help in a process. Here the objective is to reduce anxiety and generate the feeling of being cared for. Help links to the service dimension in marketing and communication and can be a powerful

dimension for assisting the development of ideas, relationship and sales activation, and of course for many brands a way to product experience.

4. **Product, service or environment experience**
   The objective is to give the recipient an experience, whether actual, such as in a product trial, or imaginal, such as through a virtual, visual or verbal representation of the subject or product. Given that it is more difficult to buy something you can't imagine or haven't experienced, this is an important communication objective.

Each of these is present to some extent in every act of business-oriented communication. The Lush, SEEBOARD Energy and IDM examples given earlier all demonstrate them. Therefore they can be used to plan, brief and evaluate any communication, at any level, and to brief any business partner. However, the relative priority and specific objectives of each element will vary from communication to communication. Deciding on the relative priorities (represented for example on a radar chart) and specific content of these objectives and subsequent evaluation of performance against them that constitutes the planning challenge. As ever creative minds take these priorities and objectives and translate them into successful ideas and executions, sometimes in a single image or phrase ('Never knowingly undersold').

Governing idea   Communities   Disciplines   Media/Touchpoints   Sub-elements
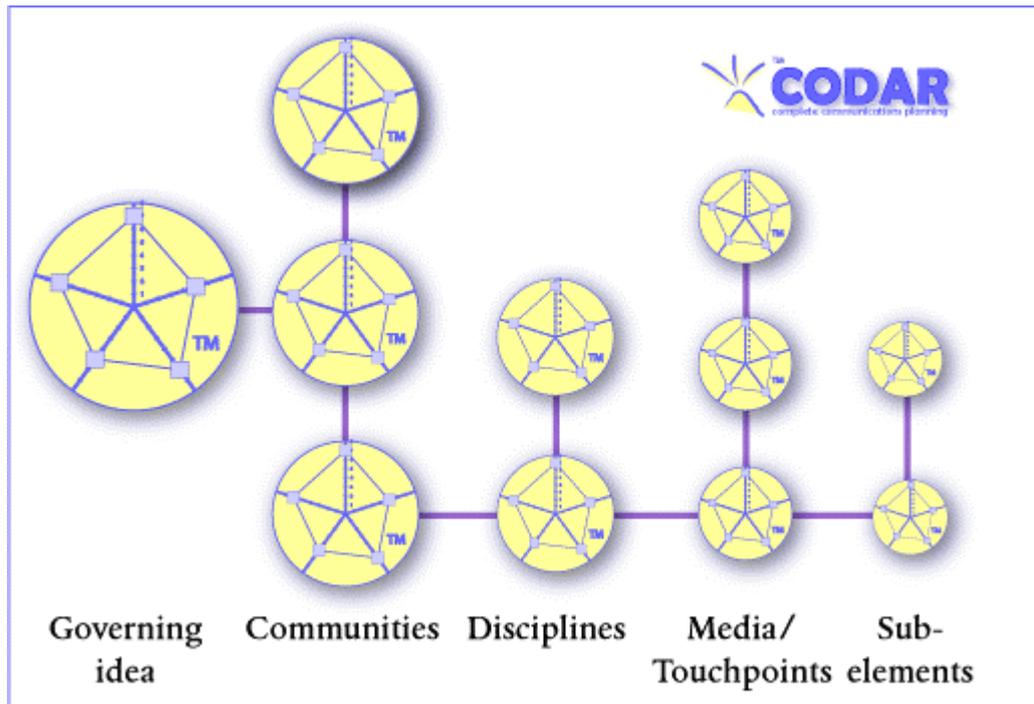
Because the same framework is used from master level (e.g. global brand positioning) to fine detail (e.g. a banner ad), it has fractal properties. (Fractal is a term coined by the Nobel Prize winning scientist Mandelbrot to refer to structures that replicate to increasing levels of detail, the whole reappearing in the parts, a phenomenon common in nature and key to Chaos Theory). For example, a brand can use CODAR to support its positioning statement or the master level communication plan for a major communications programme such as a product launch. It can further plan for other levels in the communication structure: for example to different communities or stakeholders, through different communication methods or disciplines and media. CODAR is therefore applicable from the master plan to the banner on a web page.

The scores assigned to each communication at the planning and evaluation stage represent the communication's CODAR Signature and each communication can then be compared with any other as to the balance of objectives and subsequently performance.

Along with these scores, planners provide precise descriptions of the objectives, define what constitutes successful performance in relevant units, and specify the planned contribution related to budget of the activity. For example, the AA re-branding programme had an 'idea forming' priority (one of the CODAR dimensions) of 6 with the specific objective that motorists believe that the AA has a wide variety of relevant products besides roadside coverage. This was then evaluated using research. There should be restrictions on the total number of priority points that can be allocated across the dimensions to force prioritisation

It is therefore possible to define a planned score or performance level ('plan score') and subsequently calculate the actual score or performance level ('actual score') for each and any communication of any type based on metrics. The plan and actual scores can be defined in terms relevant for that type of communication while being automatically translated into a common framework. For example, taking the AA 'idea forming' objective above, the metrics for achieving their objective might be: a 40% increase in number of AA products known to motorists ("awareness") and a 25% increase in number of products considered relevant to motorists ("salience"), with the second element contributing 75% of the total.

The Centre for Integrated Marketing will provide a benchmarking and research service for CODAR users who we expect will get competitive advantage. CODAR is a powerful aid in achieving the Centre's estimates that the typical brand could enhance its communication effectiveness by 10% to 25%. CODAR also serves as an indicator that breakthrough is possible and that the old ways are no longer needed.

Open Tool applications and benefits

Open Tool architecture (such as CODAR) lends itself to a number of different planning and evaluation applications.

Strategy and positioning/Organising idea

It can be used to develop strategy and positioning, as well as providing input into the organising or governing idea (such as IBM'S 'e-business' or NSPCC's 'FULL STOP') and positioning.

Global programme objectives

For example, the AA launched a brand repositioning programme in 2002 that aimed to make consumers more aware of the AA's product and service diversity, called Just AAsk (see diagram). Just AAsk, like most other such programmes, had a phased, multidimensional set of goals that was achieved across a range of stakeholder communities and methods involving several agencies and many communications.
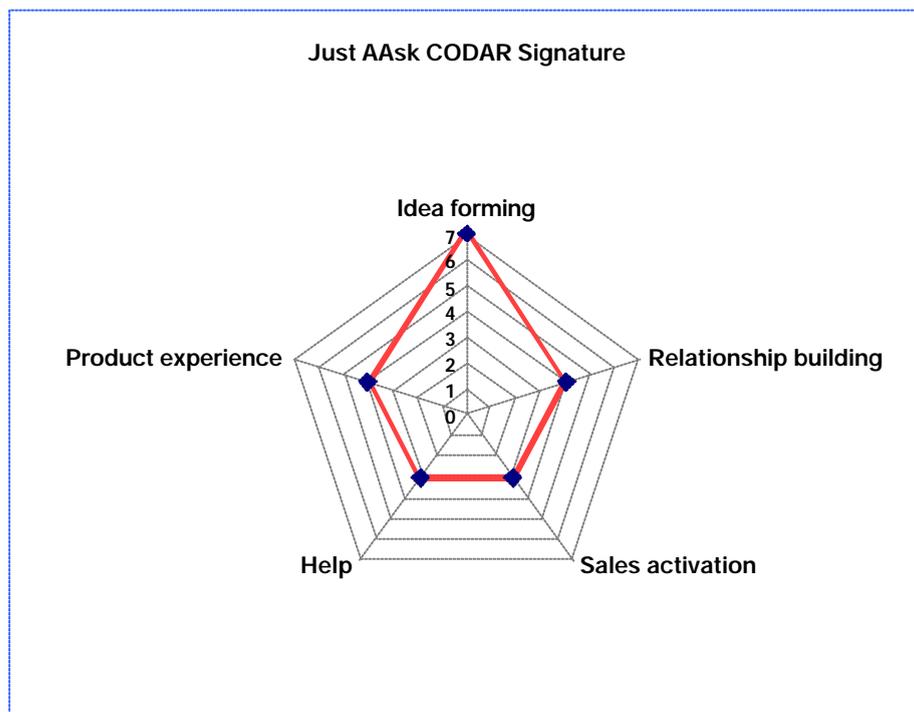
Just AAsk CODAR Signature

Figure 6: The AA's previous communication, based on the endline The 4th Emergency Service, proved dysfunctional, ignoring over half the brand's revenue lines, including insurance. A brand relaunch based on a more coherent proposition (the AA rescues you from uncertainty) was summed up in the icon Just AAsk. The 'CODAR Signature' shows the relative priorities in the overall communication mix. Each element in the subsequent communication plan contributed to these objectives. CODAR uses the

same tool 'from top to bottom' and across all media and disciplines. Source: Centre for Integrated Marketing case study

Customer focus

Open Tool architecture is adaptable to each and every communication situation. For example, wherever flexible communication is possible, communications designs (such as CODAR Signatures) would routinely be developed for:

- Different customer or audience communities, e.g. employees, trade customers, journalists, business and consumer customers and sub-segments. For example, Sainsbury's plans a specific programme for its customers who are mothers,
- Different stages in a customer relationship, for example prospect, regular customer and defector, and different value groups. For example, IBM has a programme using CODAR for its high worth customers
- Different contact points or media and different communication disciplines, e.g. web, TV advertising, call centres. For example, SEEBOARD Energy had different CODAR objectives for its website, call centre, TV and mail programmes during its award-winning *Where does it all come?* from project. This also assists with planning multipoint and sequential contact strategies, as well as the individual contact elements.
- Time-phased focus based on changing brand perception: for example the CODAR signature for communication at World Rally Championships changed year-on-year as the brand evolved
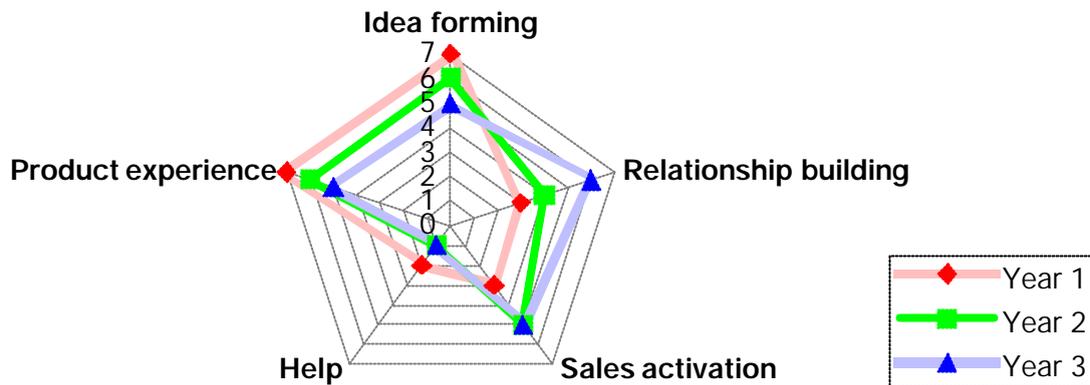
WRC CODAR Signature - Consumer

Figure 7: The WRC CODAR chart illustrates the changing mix of communication priorities

Research

Open Tool architecture can be used to enhance research, providing a seamless and media neutral connection between research, communication planning and evaluation. For example CODAR planning dimensions provide a powerful research programme brief which is being adopted by clients.

During the initial phases of research, the objective is to identify communication needs based on underperformance on any of the dimensions against competitors and/or audience/customer expectations.

Subsequent phases of research are used to identify the effectiveness of communication in achieving the objectives. A research goal is to identify the relative importance of the dimensions and dimension mixes for different customer/audience groups and situations.

Workshops, discussion and briefing

Open Tool architecture makes an excellent workshop and discussion tool. CODAR has already been proved successful in enabling clients to participate effectively in strategic thinking.

An Open Tool approach has proved powerful in clarifying and enhancing client briefs. As such it is an excellent account management tool for agencies or brand manager support.

Because it specifies communications objectives in neutral or open terms people from across the disciplines can contribute expertise and ideas on a level playing field, while still benefiting those with the smartest insights.

Benchmarking

The planning signature attached to each communication programme and job makes it possible to create a benchmarking database across all work for a given client or indeed across clients. This can be used to analyse the effectiveness of different strategies, markets, offices etc. for management purposes, learning and also international and local strategy development. For example, this can be used to identify optimum strategies for a brand or category. Over time, management can gradually evolve a variety of different benchmarking applications.

Communications optimisation tools

An Open Tool provides a universal interface between business goals (such as market share and profitability) and communication metrics (such as satisfaction, attitudinal, or response scores). Using common currency evaluation frees marketers from biased heuristics and enables more powerful channel profiles to be developed. At the same time, an Open Tool expects the user to define success in actionable/measurable criteria, so existing evaluation metrics can still be useful to assess performance, enabling the best of both worlds.

The planning framework should be incorporated in media and channel planning tools to support mix and schedule optimisation. As suggested above, particular categories or brands can be analysed to identify optimum strategies, as well as optimum contact/media and marcoms discipline strategies. The contribution of different communication methods can be analysed and compared as part of a benchmarking-optimisation cycle.

A profile of the effectiveness of each channel for a client or category (or generally) can be developed through a combination of research and econometric modelling.

Training, learning and knowledge development

Open Planning encourages more effective thinking about communication objectives and Open Tools can be used as the basis of training, both formal and on-the-job.

It enables more intelligent evaluation and comparison of communication work.

An Open Tool is also an excellent for the organisation of a knowledge management system. Since all work- including retrospectively if desired – has its own 'signature' based on the tool dimensions, this can be used in searching for work of a desired profile ("give me projects with a high 'relationship building' element!")

Conclusion: Creating meaning not difference

Open Planning and Open Tools mean that marketers can focus more effectively on creating the meaning and worth across the brand's contact points with stakeholders, rather than being tied up in the fragmentation of the present environment. Clients can develop more even handed and creative relationships with their agencies. Agencies can learn from work across their clients. Integrated agencies have a tool that combines all their skills. Research can provide more relevant insights. Evaluation can compare performance across all work. Communication skills are more transferable.

We can continue in the era of division and confusion or we can move into the open era. Once upon a time each train company had its own track standards, each electrical manufacturer had its own electrical standards, and each computer company had its own inter-computer communication standards. And each communications discipline and medium its own planning and evaluation criteria. Do you want to be in the Open or the primitive era?

[1] Research into UK Integrated Marketing Practices, 2004; preliminary report by the Professor Angus Jenkinson and Branko Sain, Centre for Integrated Marketing, based on 79 leading companies. 'Strong achievement' in this context means companies score 6 or 7 on a scale of 1 to 7.

[2] Kevin Bishop - EMEA Marketing Director, IBM Business Consulting Services

Prof Angus Jenkinson – Centre for Integrated Marketing

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Barbara Lauer - Head of Marketing Strategy, Lloyds TSB

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

[3] Jenkinson and Sain, *IDM Communicates, Clutter? What clutter*, Centre for Integrated Marketing, 2003

[4] Jenkinson and Sain, *Lush, the scent of success*, Centre for Integrated Marketing, 2002

[5] As evidenced, for example, by the latest IDM course on 'Briefing and Evaluating Creative' (2004)

[6] Saunders, J. (ed) The Communications Challenge, a practical guide to media neutral planning, APG, Great Britain, 2004.

[7] CODAR has a patent application filed and is therefore available by license from Stepping Stones Consultancy Ltd