

Advice for the Next-Generation Planner

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Retrieved March 20–April 03, 2009 from theplanninglab.com



For some decades the account planner has been providing clarity and direction in the field of advertising. But the world has become faster and harder to grasp. How can the planner of tomorrow thrive in times to come?

The opinions, actions and interactions of people are in a constant flux as new societies and technologies emerge. In this world account planning has become more interesting and more useful than ever. But it has also become more demanding as a job. The next generation of planners have to think and do right in so many ways.

To get general a general sense of direction, I asked some great planner minds across the global advertising industry for their best tips. I gave them one simple question:

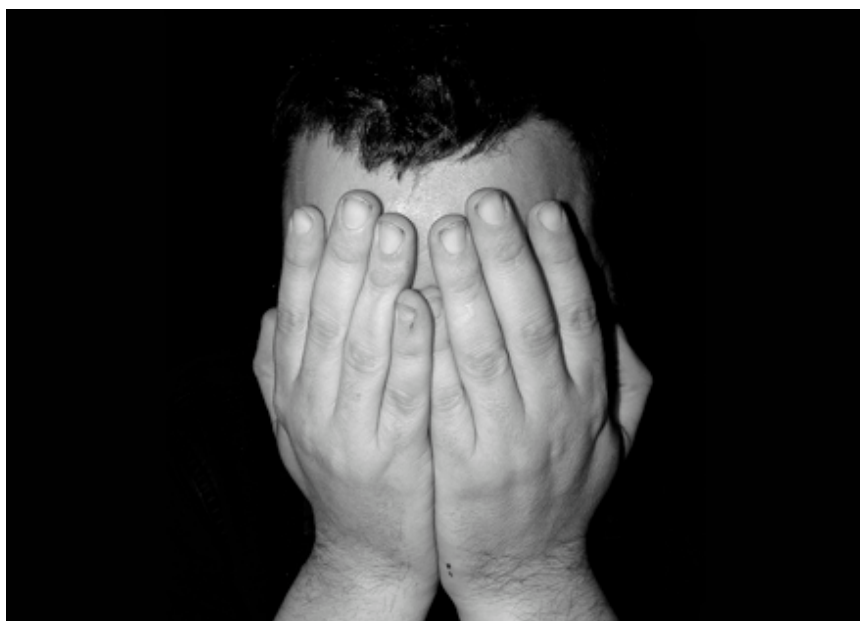
What's your best advice for the next-generation of young and ambitious planners?

I hope you will enjoy this collection of advice and that it will inspire you to planner greatness. It's really good stuff.

Contents

Part 1: Russel Davies	1
Part 2: Aki Spicer	2
Part 3: Faris Yakob	3
Part 4: Heather LeFevre	4
Part 5: Holger Schneider	5
Part 6: Merry Baskin	6
Part 7: Pete Heskett	8
Part 8: Patricia McDonald	11
Part 9: Victoria Kaulback	13
Part 10: Paul Isakson	16
Part 11: Nina Rieke	18
Part 12: Matt Willifer	21

Part 1: Russel Davies



Don't get too hung up about brands. They're not that complicated.

You can learn all the theory you need to know from *Eat The Big Fish* and *Truth, Lies and Advertising*. Or a couple of other similar books. There's about two books worth of theories and stories you need to know. Everything else is experience.

The real art of planning isn't about brands, it's about organisations. What a good planner really learns is how to get organisations to do stuff. Early on it's the account group organisation; account person, creatives – you learn how to get them to do something. Then it's a few clients, or the whole agency, then the marketing department. Eventually, you learn how to get huge global organisations to do stuff. Not necessarily the right thing, not necessarily what you think they should do, but something. That's really, really hard. That's a good skill. That's what you should pay attention to and study. What does it take to get Organisation A to do something? Research? Powerpoint? Video? A manifesto? What happens when Organisation A has to work with Organisation B? How do you help that happen?

Start thinking about that. Pay attention to what works and what doesn't. Get good at that. Then you can go and get a proper job.

Russell Davies is founder of Open Intelligence Agency, former Global Brand Manager of Nike and former Planning Director at Wieden+Kennedy

Part 2: Aki Spicer



Start to SOLVE THE PROBLEM. Classic planning has been about planners sourcing a way to speak about the brand in the most compelling ways.

I think there is a new opportunity for planners to leverage their customer insights to not only communicate about the brand's value, we can and should influence actual business solutions and ideas. So an example: Nike+. Is that a marketing communication? Or a business solution? Or a research tool? Or a customer service channel? Well, it's all of that. A billboard headline is nice. But a Nike+ solves the problem.

We're smart enough to help clients solve the problems. It gets us and our agencies deeper into the clients business, and makes us more valuable than last week's headline copy. Just a thought.

Aki Spicer is Planning Director at Fallon Worldwide

Part 3: Faris Yakob



- Be nice. All the time. To everyone.
- Try to meet other nice people who interested in the same things as you.
- Don't get [too] cynical.
- Stay interested in advertising and communication.
- Stay interested in other things too.
- Never be afraid to ask questions.
- Reading is for awesome people.
- Write a blog.
- Take pictures.
- Develop your own theory about how brands work and what they are for. But don't fall in love with it.
- Become a geek [or an expert on something].
- Steal everything – every trick and idea – and make them your own.
- HAVE FUN!

Faris Yakob is EVP Chief Technology Strategist at McCann Erickson and of Author of The Age of Conversation

Part 4: Heather LeFevre



From my perspective, I think mastering the art of conversation is one of the most important skills to develop. *How to Talk to Anyone* is a great book to help. You have to build rapport with surly creatives and clients that you may not see all that often. They will invite you into their inner circle if they trust you, find you interesting and want to talk to you. It doesn't matter how smart you are if you haven't got that.

Heather LeFevre is Senior International Planner at DDB Amsterdam

Part 5: Holger Schneider



- Not new but still true: be curious, be open and never stop asking questions.
- Always try to understand what moves and intrigues you and how you can put it on your goal.
- If you don't have an opinion, how can you convince someone else? How can you be convincing without being authentic?
- Research studies can be helpful, but are rarely sufficient. Go out, observe and speak to the people – and LISTEN carefully. Conversations provide deep and surprising insights.

Holger Schneider is Strategy Director at Scholz & Friends

Part 6: Merry Baskin



(Some Rather Bossy) Advice for the next generation of (student) planners

1.

Read. Feed your Head. Think about what it means to you personally. Discuss with others. (This'll get you smarter faster – why try and reinvent it all again from scratch? Just build on it in your own style and using your own experiences. It's all out there nowadays for the taking). I just spent a week with the Advertising/Planning students at University of Oregon and was appalled at how little actual reading some of them do – apart from devouring all those nice chatty blogs and twitters etc. (Nothing wrong with these incidentally, but not if that is your only diet. It's like living on beer and crisps. Great fun to start with but ultimately a bit gassy, bloating and gives you spots.) And these guys are students – isn't that the time of life when you are meant to be reading? And thinking? And writing papers? There are some amazing tomes and think pieces out there, which are incredibly substantive, astute, informative and practical, written by people with considerably more intelligence, wit and experience than the average Ad student, so why not benefit? These books will also require you to think and reflect on how they apply to your market and your brands in today's climes, since their wisdom is not spoon fed in sound bites for you to regurgitate.

Four ESSENTIAL account planning books (which should be on your reading lists – recommend them to your professor if they are not – are A Master Class in Brand Planning by Stephen King (OK, I co-edited it but I make no money from this promotion, all royalties go to Stephen's widow, this is perennial wisdom from the co-founder of our discipline), Jon Steel's Truth Lies and Advertising, Adam Morgan's eatbigfish, and the

recently published APG GOLD book – a compilation of the best award winning planning case histories from the past 15 years or so. And if you are into research, especially qual, then Wendy Gordon's Good Thinking is brilliant.

2.

Be Curious. Be Relevant. Be Persuasive. My cocktail party job description is "I get paid to be nosey". But the key next step to my job is what am I going to do with what I have found (or seen heard felt thought)? 'Knowledge Application' is the key practical next step – how can we use this stuff to get to where we want to be? (aka Stephen King's Planning Cycle). Then it's Team Persuader – NB not leader – that's the account people – How am I going to get everyone to come along with me?

3.

Check out the APG website if you have not already. In addition to ordering the Gold Awards book and the Stephen King book, check out two things – without wishing to sound like Mandy Rice-Davies, the piece on 'what is account planning' which, although I wrote it 10 years ago, is still quite pertinent about what craft skills the job of account planning entails, and think about how you can set about acquiring some of them. The other is the booklet 'Testing to Destruction' which you can download. Again this is even older – 30+ years – and while certain passages have not stood the test of time, sadly all of the appalling methods and models of thinking he describes are just as prevalent, especially in the US, today. The next generation needs to do something about this. God knows my lot have tried, and some progress has been made, most notably by Hall & Partners. Maybe you can succeed where others have failed, given the dramatic changes happening in our industry and the wider communications world we operate in these days.

4.

If you are a student, I do not envy you trying to get a job in this economic climate. Read the above books, digest and be ready to develop your own well thought through theories on the back of them and you will be able to shine head and shoulders above anyone else at interview. Oh and it is a good idea to spell check your e mails, since errors make you look unprofessional, inattentive to detail or a bit thick when presumably you are trying to make a good first impression. Or is that just me being old fashioned?

Good luck!

Merry Baskin is Planning Director at Frame, founder of Baskin Shark and former Planning Director of JWT London and Chiat Day New York

Part 7: Pete Heskett



Be global.

This is quite a simple one.

The Planner of the future will need to be more Global not just in experience but in outlook and orientation. Obviously clients are going in this direction which means it's where the income stream is. But more significantly this is the way the world is going. We will travel more, we'll consume more culture from outside of our home countries, and we'll all become less 'national' and more 'cosmopolitan'. Planners will need to make sure their ideas are more cosmopolitan and will need to focus not just on the difference of brands but how they can connect to the similarities in people across cultures.

The greatest thing about this is that no-one has really cracked it yet. It's the biggest unconquered horizon for Planning and if you're adventurous its where you'll be heading.

Cultivate your instinct and intuition.

I think Malcolm Gladwell is right about his 'Blink' thesis. And it's not just trendy pop-social science pundits working for the New Yorker who are saying this kind of thing. Countless neuroscientists and even self-proclaimed marketing geniuses (Martin Lindstrom) are now talking-up the role of the subconscious in decision-making. Last but not least I also believe Paul Feldwick and Robert Heath are right about when they talk about "low involvement processing" in communication.

All of this is a huge slap in the face for the idea of 'rationality' in psychology, human decision-making, and how people relate to communications. It's not new news of course as many enlightened marketers knew this... well kind of instinctively.

So if communications is often subliminal, deeply rooted, subconscious, and deeply irrational then surely the person who advises on how to communicate effectively will need to have a deeply attuned sense of instinct and intuition?

"Strange attractors".

I've stolen this phrase from a very bizarre magazine I picked up once...

... so how is it relevant? Well to me great Planners are voracious consumers of culture in all its shapes and colours. That's why Planners love the Internet so much. The stereotype of the Planner being a sort of Nathan Barley style figure obsessed with obscure Belgian electro-acoustic performers (a very London stereotype) is right because good ideas can come from having this kind of personality, even though the Nathan Barley bit is perhaps a bit discomfoting...

James Webb Young defined an idea as being two things being put together that haven't been put together before. I think if you've got a thirst for 'Strange Attractors' then you've got a better chance of coming up with good new ideas.

Also focus on skills, which don't come naturally.

If you're bright, energetic and creative you'll probably do well in Planning. However, these building blocks of raw talent often aren't enough on their own. The biggest issue I see with the development of Planners is that they're not always good at doing the things they don't do well naturally.

These are the things which are often roadblocks to development e.g. not being interested in the business side of things, or seeing management, and definitely anything to do with Account Management, as something slightly satanic.

I don't think it's a radical prediction to say that brands and strategy are going to become more important in the future. Obviously there are some who think that the future of Advertising is a little less rosy. This will leave a huge gap for Planners to fill if they want to take it. Our skills and often our personality, values and disposition are much better suited to this new environment we're facing than a lot of suits and creatives who often want to cling to the old ways. One thing is for sure however is that if you limit your skillset to "Pseudo-intellectual with a trendy T-shirt who client likes because they are little bit more honest" then you won't be able to take these opportunities. Which leads me to my final point...

Become a producer.

A year or so ago I met a proper marketing genius called Pau Yi Min who runs the PPGroup in Taiwan and isn't as well known as Martin Lindstrom probably because he doesn't say things like "I work 450 days a year with all of the world's most important people on all of the most important projects" in the early chapters of his books. Anyway, I'm getting off the point. To my mind Pau Yi Min runs the agency of the future, much more so than our Western darlings like Crispin or Anomaly. If you're interested you should find out more.

Pau Yi Min said that one of the reasons of his agency's success is that it doesn't matter who you are, what you've done before, or what you're primary expertise is – everyone in his agency has to be a producer some of the time. His agency does everything – graphics, digital, traditional advertising, events, retail, and not only is it all brilliant but its also very often highly innovative, doing things that haven't been done before. What's great about his model is that everyone plays a role in making this happen. I often see Planners who are now starting to come up with communications and marketing ideas that are often better than what the creative department generates but we generally have no idea about how to make them happen which means that these ideas die in the creative departments bin of 'not invented here'. I think if Planners could learn to become better producers then the sky is the limit. Then we wouldn't have to call it 'Planning' anymore. The End!

Pete Heskett is South-East Asia Planning Director at JWT and former Head of Planning at BBH China

Part 8: Patricia McDonald



What advice would I give the next generation of planners? To misquote one William Jefferson Clinton, for me, it's about the data. Using data to inspire and illuminate, not simply evaluate or quantify.

For the first time ever, we know exactly what people want. Not what people tell us they want in focus groups or tracking surveys but what they really, really want. We have an accurate, exhaustive and ever-evolving record of the hopes, fears, loves and loathings of humanity—what John Battelle, writing about search, described as “The Database of Intention”.

We know, literally, what they're looking for today. Through the power of the crowd we know what they're going to be looking for tomorrow. In their millions, through search logs, social networks and microblogs, our consumers can tell us things that as individuals they don't know yet. They can tell us where flu is going to strike next, who's going to win Pop Idol, they'll tell us before we can see it anywhere else when the housing market is on the way up. They're telling us every day what they love and hate about our brands. As the heralded “voices of the consumer” what could possibly be more exciting?

There has never been more information, more freely available, from richer sources. One of the most valuable commodities in the world and companies are literally giving it away. Because the data flooding in is out of all proportion to companies' ability to analyse it, much less turn that analysis into insight. There's too much out there to simply crunch. So we need to marry analysis with instinct, statisticians with cultural mavens and trendhunters, left brain with right brain. Sounds a lot like a job for a planner...

So embrace the information overload, wrangle the data, interrogate it, manipulate it, get to love it. Watch the conversations happening round your brands; spot your super users, your evangelists and your antagonists. Watch what's happening in the fandoms, keep your eye on the geeks and the mavens and watch them predict the mainstream. Find new ways of visualising the data, of turning information into dynamic, compelling and strangely beautiful insight.

What else... Be generous with your ideas. Be extra generous with other people's ideas. Get comfortable with chaos. Get good at drawing clarity out of it. Never forget it's not enough to be right-you have to take people with you. And wear good shoes.

Patricia Mcdonald is Business/Planning Director at BBH London

Part 9: Victoria Kaulback



1.

Don't do it. Seriously. If you have what it takes to be a good brand strategist, then you probably have what it takes to run a microcredit operation that can bring thousands of people out of poverty, or be an investigative journalist, or make organic goat's cheese. Any number of things that will almost certainly be better for your soul, and your stress levels, than planning.

2.

If you must do it, do it with disproportionate zeal. This will mean learning people skills. I didn't have any for the first, roughly, twelve years of my career. I eventually found I needed some (and they are still pretty rudimentary) because I find my job involves a lot of pushing and persuading. For example, persuading people that it's a good idea to investigate things deeply, never rely on what's worked before, challenge all assumptions.

This is not an approach prevalent among marketing professionals with an average job tenure of 18 months. A lot of businesses do OK in spite of their marketing efforts, not because of them. Results can always be better. Thinking never stops. There is always a more lateral way. There is always a way to make a boring brief un-boring. If people can feel your passion and investment, it may rub off on them. Be warned: it's tiring. Very very tiring. You will need a lot of vitamins, or alcohol, or massage therapy.

3.

Explain to your account management colleagues that strategic development requires as much time as creative development, and is also a creative process. This may require daily repetition for up to two years before it is universally accepted. Be patient.

4.

Become an expert in human emotions. My biggest struggle in recent years has been to convince certain clients that human nature is not rational. This has always seemed evident to me, possibly because of my own comically irrational life choices. Luckily for those starting out in the profession, the catastrophic global financial meltdown triggered by the domino effect of greed (which is an emotion, folks) has caused a widespread questioning of traditional economic theory, and its assertion that people make rational decisions. The new band of behavioural economists (Dan Ariely, Nassim Nicholas Taleb et al) is having a long overdue day in the sun and are being listened to.

They assert that human decision-making is extremely emotional, irrational and sometimes random. Some marketers already know this. But for those that don't, the new behavioural economists and the emerging evidence from the world of neuroscience/neurobiology/epigenetics help support it. (For example, the disconcerting recent-ish confirmation that we operate on the basis of our conscious mind around 5% of the time, 95% of the time we're operating on our subconscious mind.) All this will eventually filter into marketing departments and make for stronger marketing and communications, based on a more refined understanding of what drives people. As someone clever once said, emotions lead to action, while thinking only leads to conclusions. Emotion fuels economies, wins elections. Emotion rules the world.

5.

I recently had the privilege of meeting some young planners at Miami Ad School. I was refreshed and delighted to see that many of them drew insights very widely - from data but also from history, literature, films, life experience, current affairs, psychotherapy, physics, anthropology, sociology, art, the bus stop, the café...

This cross-fertilization approach obviously makes for the richest, truest and most relatable insights. I actually think it's been much neglected in comms agencies and marketing. Yes, it takes time to read widely and NO, YOU CAN'T JUST READ MARKETING BOOKS, IT MAKES YOU REALLY BORING. So, young planners, my advice to you is to please remind us of that, every chance you get.

6.

You MUST do pro bono work for good causes in addition to paying clients. There is no excuse. You MUST do it. You will sleep better. Or, start a social enterprise arm in your agency, if it doesn't yet have one. It's the way the world is going: governments can't get everything done. Business needs to step in. Business needs the credibility too: consumers don't trust businesses any more, by and large, with good reason.

7.

There was a seventh point. But I forgot it. I became distracted. That happens in this business.

Victoria Kaulback is Brand Planning Director at Y&R New York

Part 10: Paul Isakson



Hone your skills in the three "I's" – Insights, Ideas, Inspiration.

Learn what a great insight is and never stop looking for them. Everywhere you go and in everything you do, there are insights waiting to be found. Don't miss an opportunity to spot them. If you're not sure what a great insight is, see this post from Richard Huntington.

Ideas are not the sole property of the creative department. They can come from anywhere. Even you. Learn what makes an idea great and learn how to make one even better. Push them and the people who come up with them to take them as far as they can go until they break. The longer it goes until you break it, the better and bigger the idea is. Love great ideas. They make the world go 'round.

Learn how to inspire everyone you work with, including yourself. Start by figuring out what drives your agency – the clients, account, planning or creative. Whichever one is the driving force for the work you do, figure out how to inspire that one first. They are the key to getting great ideas brought to life.

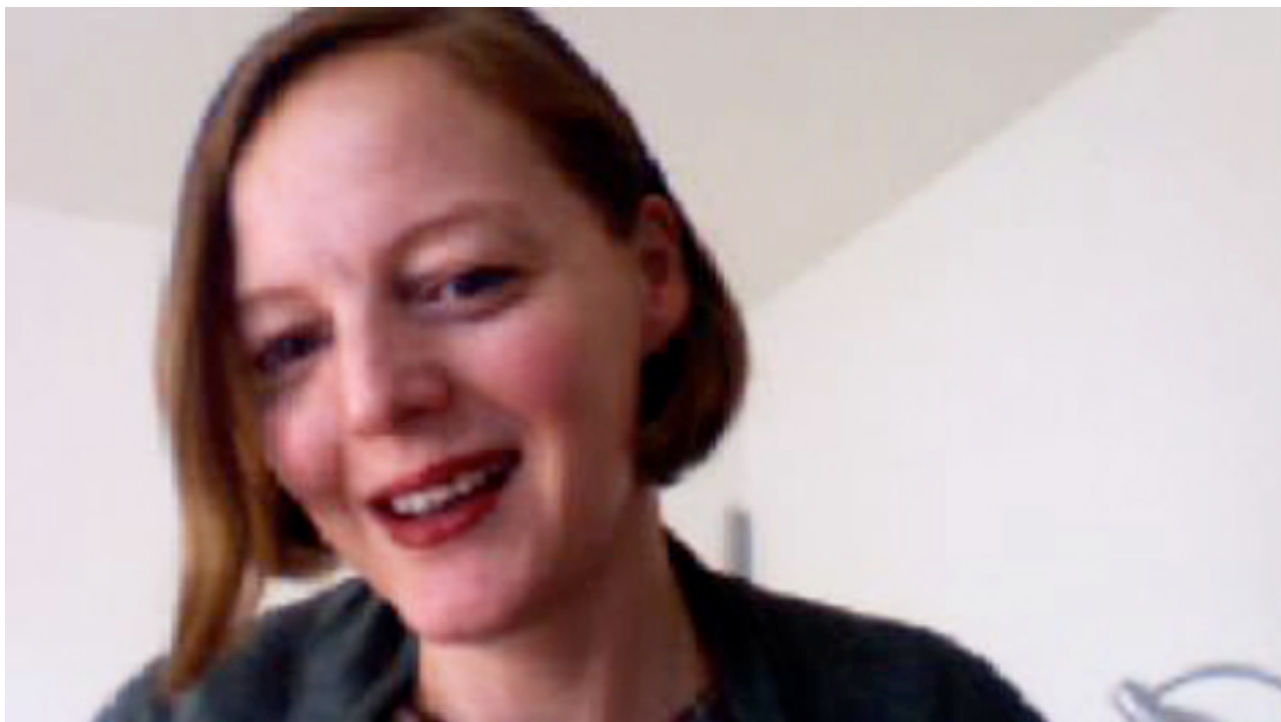
For your creative teams, figure out what makes them tick and how to get the best work out of them. Feed them all you can of what they need and you'll get better and better work out of them every time. For your account teams and clients, discover what they need to get excited about an idea. Then, partner with the creative team to present the work to them in a way that makes them say, "YES!"

For your planning team or yourself, figure out how to push yourself each and every time. If everyone is looking to you to be the lead, you have to know how to inspire yourself when the challenge itself isn't so inspiring. Not only that, but things will get difficult at times and you'll reach a point that makes you think about giving up. Don't. Dig deep and inspire yourself to find a way to solve the problem you're facing.

Lastly, don't get caught up in a classic planning trap of trying to prove you are the smartest person in the room. It's actually the worst thing you can do. Instead, learn how to make the people responsible for bringing good ideas to life in the world feel like the smartest people in the room. It will go a lot further to getting great ideas off the board and into action and everyone will still recognise the great value you bring to each and every assignment.

Paul Isakson is Director of Strategy & Insights at space150

Part 11: Nina Rieke



1.

Don't think in advertising – but in solutions.

Our work is less and less about ads, but about connecting to consumers through ideas. Ideas, that offer solutions to something that is relevant in their lives.

2.

Get inspired by the best.

A lot of great planners put their knowledge online. Have a look at the blogs of the smartest (see more on Plannersphere etc.) You will gain great input. And have a chance to interact. Look to work at the best and most famous agencies and companies with the people you admire most. If you don't make it right away, try again. And again. It is worth it. Do not waste your time at mediocre places. Especially not early in your career. Learn from good case studies. Try “reverse engineering” from existing communications – what could have been the message? Practise!

3.

Have a broad view.

Planning is about thinking smart and connecting facts and insights in a way that is hopefully new, different, relevant and successful. Interact with interesting people – not just ad guys.

Read stuff. Some planning books are good, the apg awards offer further insights. But apart from that: read other stuff. Watch films. Talk to people. Get out there into life. And connect with real people – they might have interesting stuff to say and have quite a different perspective on life, brands and communications.

4.

Be protective of good stuff.

Often it is not about being the "advocate of the consumer" but the "advocate of the idea". Take research as what it is. Another way to gain insights. And nothing more. A lot of times people will not recognize a brilliant idea. Learn to deal with researchers and results. And how to best care for good ideas that need to survive pre-tests. There is lots of stuff you can do. Involve consumers at the right stage – in the early phase to gain insights and clarity on how they might understand issues. When testing ideas learn how to be sneaky and beat the test methodology. Regarding innovations or communication ideas – more often than not research or lesser skilled researchers kill ideas.

5.

Be visionary and realistic at the same time.

Don't take it personal if the client does not buy into your strategy, the account person is telling you to be less bold in your presentation, or the creatives are annoyed by a creative brief that has been signed off by the client already. Get a clear understanding of the role planning is having in your agency/ company as well as for your clients or for a specific project. Take it as a game, enjoy the politics if you can handle it or steer clear of it from the beginning. It is not always about the best and truly right solution.

6.

Team up – planning often is a group effort.

It is never "we against them". In case you are working in a communications agency your work will only get better if you have close relationships with your colleagues. This might sound simple – but some planners love to hide out and come back with a finished brief, being discouraged that it does not hit off with the team right away. It is not always the planner that has writes the great message or brief by him- or herself. Planning is a way of thinking – and can be done by any smart person on your team.

7.

Do not just be right, be interesting.

With all the stuff planners come up with – creative briefs, presentations – facts, insights and data of course needs to be accurate. But it is not always the message that is 100% right, that hits the spot but the most interesting. So: be right, but do not stop there. Remember: planning at best is not merely giving direction but inspiration.

Nina Rieke is Senior planner and founder of Burobraun, and former Senior planner at Springer & Jacoby and Jung von Matt

Part 12: Matt Willifer



I want to tell you about something inspirational; something that has inspired me and might inspire others. I toyed with art, imagination, insight, curiosity. Even love.

But given these are recessionary times, I came up with money.

Does this seem like a grubby and uninspirational theme? If so, this might be part of the problem. Planners do not centre themselves sufficiently around money. It's to do with our natural sensibilities; we are more likely to be frustrated novelists than frustrated accountants.

Imagination, empathy and clarity are cornerstones of our art. But they are (of course) just means to an end. Account planners are money-making machines. They exist to make their clients money. They are the bridge between a creative endeavour and an improved balance sheet. They are better placed than any other advertising discipline to achieve this.

Agencies sometimes talk about channels that “sell” (such as DM) and channels that “build the brand” (such as advertising). Is this meant to mean that advertising doesn’t sell? Perhaps it builds a great image for a bankrupt company. Perhaps what is meant is not that advertising won’t work, but that it is intended to have some kind of vague “long-term” sales effect. But how can advertising have a long term sales effect without a short term sales effect?

People who say, “the purpose of advertising is to build image” risk not giving a proper reflection of how advertising is intended to make money. It makes the client think you don’t really care about business in general (or, worse, their business in particular.) Perhaps subconsciously a lot of us don’t really believe that our advertising will make money. In these cases, talk about “brand image” is comfortingly woolly. It absolves us from responsibility.

The ways of spending money used to be simple. You did some advertising. Sometimes it made money, sometimes it didn’t. And sometimes you didn’t really know. But now there are lots of different ways to invest. Lots of different ways to make money (or to waste money).

With more alternatives, the issue now is not even whether you make your client money; it’s whether you make them more money than the other alternatives they have available.

The winners over the next ten years will be those who come not just with wonderful ideas, but with sound financial arguments as to why and how these wonderful ideas will make their clients money. They will have a theory about exactly how they aim to make money for their clients. Not just in ten years time, but in one year’s time. I have seen the future, and it has a spreadsheet.

Have the right frame of mind. Judge everything against whether you really think it will work. You might come with a wonderful insight, you might have cleverly turned the problem on its head, you might have produced a clever twist worthy of an APG Grand Prix. But it might just not be right. If you’re a good planner, you can probably argue pretty effectively that black is white. It is important to step back from time to time and remember that it isn’t.

Treat the client's money like your own. (Not literally; this is embezzlement). Be careful with it, don't waste it, spend it wisely. This means putting in place a strong, logical financial argument. It also means using your gut feel: if this were your money would you actually spend it on what you are suggesting? If the answer is "no", you might be doing something wrong.

Here's something to try. Try doing the job for cheaper. (Because this is what someone else will be trying to do.) Halve your budget, set yourself the same sales target, and see what you come up with.

In this case you've got to be rigorous. You can only make money if you influence behaviour. Your starting point must be getting people to do something, rather than getting them to think something. New users or existing users more often? Instead of what? Where, when, with what, with whom? You know the drill.

Monetise this behavioural shift. How many people do you have to get to do what how often in order to meet your objective? Is this sufficient to justify your spend? If not, think of something else.

Now give yourself a media budget of zero. Okay, now give yourself a media budget of minus £1m. This means the solution is not just a piece of brand communications but a way of generating money in its own right. What would this look like? Communications that people are willing to pay money for? Service initiatives that are not really communications ideas at all? What fun you're having already.

Trying to make money and save money for your clients is actually a brilliant way to spark the imagination. After all, capitalism is based on this premise.

Generating revenue means being different. Saving money in communications means boxing clever. So "money" prevents lazy solutions. It spurs us on to better things. Which is why I thought writing about it might be an interesting theme.

Matt Willifer is Head of Planning M&C Saatchi and Chair of UK APG