

**The Role of Brand Identity in the Implementation of
Integrated Marketing Communications (IMC)
by Advertising Agencies**

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**A Thesis Submitted to
Auckland University of Technology
in Fulfilment of the Requirements for the Degree of
Doctor of Philosophy (PhD)**

2015

Faculty of Business and Law

Abstract

This thesis seeks answers to a fundamental question relating to the field of marketing communications: How does one implement Integrated Marketing Communications (IMC)?

It is almost 30 years since Integrated Marketing Communications (IMC) first aroused the interest of researchers. In that time a significant body of research has emerged seeking to define what the concept means (Kliatchko, 2009; Moriarty & Schultz, 2012) and to understand what factors are involved in managing the implementation of IMC (Kerr & Patti, 2013; Porcu, del Barrio-Garcia, & Kitchen, 2012).

The perceived benefits of IMC provide a compelling explanation as to why the practice is widespread today (Eagle et al. 2007; Kitchen & Schultz, 1999; Schultz & Schultz, 2004). The basic concept and principal benefit of IMC is synergy (Duncan & Everett, 1993). IMC is perceived as improving media and message delivery and thereby reducing media costs (Nowak, Cameron & Delorme, 1996). IMC is therefore considered an efficient and effective strategy for building brand equity (Madhavaram, Badrinarayana & McDonald, 2005).

Since the inception of IMC a number of scholars have emphasised the strategic role of the brand in the implementation of IMC (Duncan & Moriarty, 1998; Duncan & Mulhern, 2004; Schultz, 1998; Schultz & Kitchen, 2000a). Building brand equity is considered to be a key strategic objective of IMC (Aaker, 2014; Fill, 2009; Kapferer, 2008) and the brand identity construct has been proposed as a key element in that process (Aaker, 1996; Kapferer, 2008). However brand identity has rarely been explicitly linked to the implementation of IMC in a conceptual framework (Madhavaram et al. 2005).

Madhavaram et al. (2005) propose a 'Brand Equity Strategy' schematic in which they use Aaker's 1996 conceptualisation of brand identity. They propose that consistent utilisation of brand identity by brand strategists will ensure a more synergistic and effective IMC and that this in turn will lead to stronger customer-based brand equity (Keller, 1993).

This thesis considers these proposals by Madhavaram et al. (2005) and examines the extent to which the brand identity construct plays a foundational and formative role in the IMC implementation process. To date there has been no research in which the propositions offered in Madhavaram et al's 2005 paper have been subjected to any

empirical investigation. This thesis seeks to amend that situation. Consequently, the research problem investigated in the research is:

What is the role of the brand identity construct in the implementation of IMC by New Zealand advertising agencies?

Within this focus additional attention is given to the strategic role played by agency account planners in this process. The Account Planner's primary function is to produce the creative brief (Baskin, 2001; Fortini-Campbell, 2001) and the creative brief is the platform upon which creative agencies create integrated marketing communication campaigns. The purpose of account planning is purportedly to create effective marketing communications (Fortini-Campbell, 2001; Kelley & Jugenheimer, 2011). Yet, there is a limited body of empirical research relating to the role of account planners in advertising agencies. This research investigates their role in the IMC implementation process and the part that brand identity statements play within that role.

This research involves a multiple case study design. It studies how five New Zealand advertising agencies each work through the process of creating IMC campaigns for their clients' brands. Data is sourced from semi-structured interviews with senior agency and client executives and from proprietary agency documents and templates relating to the creative process. The five advertising agencies studied exemplify a cross-section of leading New Zealand agencies. Each agency embodies a single case.

A series of research questions guide the inquiry:

- 1) What is the role of the Account Planner in the agency?
- 2) What is the role of the creative brief in the creative process?
- 3) What is the role of brand identity statements in the creative process?
- 4) What are the drivers that integrate marketing communications?
- 5) To what extent is IMC, as practised by New Zealand advertising agencies, anything more than just 'tactical integration'?

The research involves a two-stage data analysis process: Stage One involves 'within-case' analysis and Stage Two involves 'cross-case' analysis. Decision Systems Analysis (DSA) is also utilised to study how advertising agency personnel and their clients make integrated marketing communication decisions within an advertising agency context.

The research finds that brand identity statements positively influence the implementation of IMC programs. Each advertising agency in the study considered an in-depth understanding of their client's brand to be an essential prerequisite to the commencement of any marketing communication work for that brand. It appears to be the norm for New Zealand agency account planners to have access to brand identity statements relating to their clients' brands when implementing IMC strategy. The form of brand identity statement favoured by the New Zealand account planners studied, when implementing IMC strategy, is the brand manifesto.

The research also finds that account planners positively influence the implementation of IMC programmes. Account planners, or brand strategists, are the authors of arguably the most important document in the creative agency, the creative brief (Butterfield, 1985). In preparing this document planners seek to infuse the brief with strategic imperatives and insights relating to the client's brand and to link these to creative insights pertaining to the target audiences' needs, wants, beliefs, attitudes and behaviour. The Account Planner is an advocate, on the one hand, for the consumer - all the way through the creative process - and on the other hand for the strategic integration of the client's brand into all planned marketing messages.

The research suggests that there are three key drivers in the implementation of IMC. First, a brand identity statement in some form; second, a big idea; and third, an understanding of the target audience's media consumption behaviour. These findings are consistent with the extant literature (Aaker, 1996, 2014; Assael, 2011; Duncan, 2005; Ogilvy, 1983; Rossiter & Percy, 1987; Schultz & Kitchen, 2000a).

Three original IMC process models are proffered in the thesis; each seeking to illuminate how IMC is implemented in practice. The first model illustrates how the three drivers of IMC act together in unison and interdependently to create IMC at a tactical level. The second model is an eight stage generic DSA model of the IMC creative process, and the third model seeks to illustrate the IMC implementation process - as suggested by research participants.

Overall, results support the view of Madhavaram et al. (2005) that, for the agencies studied, brand identity strategically influences IMC in the creation of strong customer-based brand equity (Keller, 1993).

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Attestation of Authorship

I hereby declare that this submission is my own work. To the best of my knowledge and belief, it contains no material previously published or written by another person (except where explicitly defined in the acknowledgements), nor material which to a substantial extent has been submitted for the award of any other degree or diploma of a university or other institution of higher learning.

A handwritten signature in blue ink, appearing to read 'David N Bibby', with a large, stylized flourish at the end.

David N Bibby
PhD Candidate

Publications

Marshall, R., Bibby, D.N., & Na, W.B. (2014). Making Sense of Complex Marketing Decision Systems Through Pictorial Presentations: Decision System Analysis. In A. G. Woodside, R. Marshall, & H. Pattinson (Eds.), *A Field Guide For Business-To-Business Case Study Research*. pp. 211-226. Bingley, UK: Emerald Group Publishing Ltd.

NOTE: This book chapter was awarded an Emerald Literati Network 2015 Award for Excellence. 'Outstanding author, Best Chapter Award' for the year 2014 published in 'Advances in Business Marketing and Purchasing'.

Marshall, R., Bibby, D., & Na, W. B. (2013). Making Sense of Complex Marketing Decision Systems: Decision System Analysis. *International Journal of Business and Economics*, 12(2), pp. 121-130.

Acknowledgements

I would like to express my appreciation to the following people:

Professor Roger Marshall and Associate Professor Ken Hyde have been exceptional supervisors who have given me all the support that I have needed. Their patience, encouragement, generosity of spirit and good humour have sustained me on a long journey.

Associate Professor Mark Glynn has provided invaluable and constructive feedback relating to the revised thesis.

Paul Smith has been a generous friend and one of the best Art Directors that I have ever worked with.

Lenna K. Millar of Audio Transcription and Secretarial Services Ltd provided a fast, accurate and highly professional transcribing service.

Jenny Bowden, Lee Walker, Esther Puru, Bethan Rajwer, Kamal Yadav and Stephan Blackford have all provided technical support when I needed it most.

This research would never have been completed without the love and support of my wife Jan; one of the smartest people I know, and an exceptional creative talent. Thank you sweetheart.

To my children; Vance, Jacqui Kim and Scott, thank you for your love and support.

To my late parents Athol and Mary Bibby, who instilled and encouraged my love of learning: a priceless gift. I will be forever grateful. To Geoff, Clive and Marion; thanks for your love and encouragement over the years.

To all the participants in this research; thank you for your time and generous contributions. You are an exceptional group of people - world-class professionals. New Zealand advertising has never been in better hands.

Ethics Approval

AUT University Ethics Committee (AUTEK) approved the ethics application for this research on 27 November, 2012. Application number 12/289 (see Appendix 1)

Chapter 1: Introduction

Figure 1.1: Structure of Chapter One

Section	Topic
1.1	Background to the Research
1.2	Research Problem
1.3	Justification for the Research
1.4	Methodology
1.5	Outline of the Thesis
1.6	Contributions
1.7	Chapter Summary and Conclusions

1.1 Background to the Research

Today's marketplace is changing, dynamic, complex and challenging. Multiple forces are driving these changes: new product innovations, new niche markets, new technologies, new media channels; pervasive social change, geo-political change; globalisation, consumerism and environmentalism (Aaker, 2014). Increasingly, our world is becoming a global village, where multi-national corporations and global brands have unprecedented influence. Klein (2001, p. 3) observes:

The astronomical growth in the wealth and cultural influence of multi-national corporations over the last 15 years can arguably be traced back to a single, seemingly innocuous idea developed by management theorists in the mid-1980s: that successful corporations must primarily produce brands, as opposed to products.

Klein's insight is perceptive. The evolution of the brand has changed both marketing and the marketplace. An important component of marketing strategy today involves the co-ordination and management of diverse communication activities and tools in order to build strong brands (Duncan & Mulhern, 2004; Kitchen, Brignell, Li & Spickett Jones, 2004; Schultz, 1993). It is the role of marketing communications to link the brand to the consumer (Yeshin, 1998). Keller (2001) contends: "Marketing communications represent the voice of a brand and the means by which companies can establish a dialogue with consumers concerning their product offerings" (p. 823).

In the 1960s marketing communication tools such as advertising, sales promotion, public relations, direct marketing and sponsorship were considered to be separate marketing communication elements, planned and implemented individually, without reference to each other. Then, in the 1980s and early 1990s, the concept and practice of *integrated* marketing communications (IMC) emerged. It was in 1993 that Schultz, Tannenbaum and Lauterborn published a seminal work on the topic: *Integrated Marketing Communications* (Schultz, Tannenbaum & Lauterborn, 1993).

On reflection, Schultz and Schultz (2004, pp. 9-13) contend that three shifts occurred in the mid-1980s that, in combination, brought IMC to the attention of the advertising and marketing community:

1. The development and diffusion of digital technology across the entire spectrum of business operations (for example: computer technology, databases and the Internet).
2. The increasing emphasis on brands and branding as the major competitive differentiating tool. (Because brands command a base of loyal customers they are able to generate income flows into the future. Often this future value of a successful brand is more important than its present income flow - and the future income flows the brand can create are often worth a great deal more than the tangible assets of the organisation that produces the branded goods or services).
3. The increasing focus on multi-nationalization and globalization as marketers spread across the traditional geographic boundaries. (The demise of borders and the growth of multinationals, always seeking new markets and new opportunities, created a completely altered global marketplace in the early 21st century).

Further, Schultz and Schultz (2004) suggest, there is an additional key factor driving IMC today: the demand for accountability and the measurement of financial returns on marketing communication activities. They argue that the driving forces, identified above, converged in the 1990s to leave organisations little choice but to embrace integration. For example, multi-national organisations needed an integrated global communications strategy; a unified, consistent, and integrated brand strategy, yet one that remained responsive to the unique needs of individual markets and cultures. Integrated brand communications therefore became mandatory.

Schultz and Schultz (2004) define 'integration' as: "the alignment and coordination of marketing activities around the singular focus of the brand" (p. 12). This central role of the brand in the IMC process is also argued by Schultz and Kitchen (2000a) in their pioneering text: *Communicating Globally. An Integrated Marketing Approach*.

The brand is the key to integrated marketing... Undoubtedly, the brand has become or is becoming the dynamic hub around which all marketing effort and communication revolves (Schultz & Kitchen, 2000a, p. 55).

Building brand equity is a key strategic objective of IMC (Aaker, 2014; Fill 2009; Kapferer, 2008; Keller 2008; Madhavaram, Badrinarayanan, & McDonald 2005).

The conceptualisation of brand equity first occurred in the late 1980s. It is defined by Aaker, 2014, p. 150) as “the set of assets and liabilities linked to the brand”. Brands are intangible assets. A brand’s equity is the value of that intangible asset after liabilities have been deducted. It is the value of the brand if it were offered for sale in the open marketplace (Schultz & Schultz, 2004).

According to Madhavaram et al. (2005) a brand equity strategy is a set of processes that include acquiring, developing, nurturing, and leveraging a high equity brand or portfolio of brands. At the heart of such a strategy is the brand identity concept. Aaker (2014) proposes that a brand’s ‘brand identity’ provides direction, purpose and meaning for the brand.

A brand identity is a set of brand associations that the firm aspires to create or maintain... These associations represent what the brand aspires to stand for and imply a promise to customers from the organisation (Aaker, 2014, p. 159).

This thesis reviews the IMC literature and the brand equity literature in Chapter 2. The review includes an exploration and analysis of the potential role of the brand identity construct in the formulation and implementation of IMC. It is the intention of this research to understand the role of the brand identity construct as it may inform, guide, and help to develop, nurture, and implement an organisation’s overall IMC strategy (Madhavaram et al. 2005).

1.2 Research Problem

Since the inception of IMC a number of scholars have emphasised the strategic role of the brand in the implementation process (Duncan & Moriarty, 1998; Duncan & Mulhern, 2004; Keller, 2003; Schultz, 1998; Schultz, 2001; Schultz & Kitchen, 2000a). However it is not until 2005 that the brand identity construct is linked to the IMC construct in a conceptual framework. Madhavaram et al. (2005) propose a ‘Brand Equity Strategy’ schematic in which they use Aaker’s 1996 conceptualisation of brand identity. They propose that the consistent utilisation of the brand identity construct by brand strategists will ensure a more synergistic and effective IMC and that this in turn will lead to stronger

customer-based brand equity (Keller, 1993). This thesis examines these proposals by Madhavaram et al. (2005).

It is somewhat surprising, given the ongoing interest by academics and practitioners in the process of building brand equity (Aaker, 2014; Fill 2009; Kapferer, 2008; Keller 2008), that apart from Madharam et al. (2005) there are few papers published to date that posit the foundational and formative role of brand identity in the IMC implementation process. To date there is no published research in which the propositions offered in Madhavaram et al's 2005 paper have been subjected to any empirical investigation. This thesis aims to amend that situation. Consequently, the research problem to be investigated in this research is:

What is the role of the brand identity construct in the implementation of IMC by New Zealand advertising agencies?

In answering the research problem it is anticipated that the following objectives will be met:

1. To better understand the process of implementing IMC.
2. To better understand the role of the brand identity construct in the implementation of IMC.
3. To better understand the role of advertising agency account planners in the implementation of IMC.
4. To gain insight into the current practice of IMC by New Zealand advertising agencies.

The research employs nine research questions in order to achieve the above objectives. These nine questions are introduced in Chapter 3 and thereafter provide the structure for the thesis. An evaluation of whether or not the research objectives are met is undertaken in Chapter 6.

Madhavaram et al. (2005) discuss a range of empirical research possibilities that could be implemented to test their propositions, to provide further insight, to enrich their conceptual framework and test the research propositions postulated by them. Of particular relevance to this thesis is their recommendation that "depth interviews of brand managers, marketing communication managers, and employees of agencies responsible for marketing communications" (p. 78) should be undertaken. This research takes up that

challenge. 17 senior executives of creative advertising agencies in New Zealand and one client marketing manager (18 participants in total) are interviewed in-depth. All of these executives play strategic roles in the production of marketing communications for their respective organisations.

1.3 Justification for the Research

It is almost 30 years since IMC first aroused the interest of academics as a field of academic endeavour. In that time there has been considerable theoretical development in IMC as well as empirical research demonstrating practical applications of IMC. Examples of such publications include Schultz and Kitchen's (2000) text *Communicating globally: an integrated marketing approach*; Duncan and Mulhern's (2004) *A White Paper on the Status, Scope and Future of IMC*; Schultz and Schultz's (2004) *IMC - The Next Generation*; The Journal of Advertising's 2005 *Special Issue on Integrated Marketing Communication (IMC)*, and The Journal of Marketing Communications' 2009 *Special Issue: Integrated Marketing Communications*. Invariably these publications suggest a range of future research opportunities and challenges. Four calls for research that will enhance the understanding of IMC theory and practice are discussed below. With the exception of the fourth item (Section 1.3.4) each of these calls for research originate from the above publications. They represent the justification for the current research.

1.3.1 The need for Empirical Research on IMC

There is a significant body of extant empirical research that describes and explains marketing communication as a component of marketing strategy. For example, in regard to advertising, Armstrong's 2010 text, *Persuasive Advertising: Evidence-based Principles*, reduces findings from 3000 empirical studies and 50 books to 194 evidence-based principles relating to persuasive advertising. However, by comparison, there is a dearth of empirical research relating to IMC. For example, Patti (2005) suggests that, in total, just 100+ articles on IMC were published in the 10 years prior to 2005. Research has been undertaken seeking to understand the factors involved in managing the IMC implementation process (Kerr & Patti, 2013; Porcu, del Barrio-Garcia, & Kitchen, 2012). However, very little research has been published seeking to measure the impact of IMC management (Duncan & Mulhern, 2004; Luxton, 2008). Much of the IMC literature has focused on seeking to define what the construct means, and what might represent a suitable definition of IMC (Kitchen et al. 2004; Kliatchko, 2009; Moriarty & Schultz,

2012). No empirical research has yet been undertaken in regard to the central topic of interest to this study: the role of brand identity in the implementation of integrated marketing communications.

1.3.2 The need for Qualitative IMC Research

Most of the empirical research that has been published on IMC to date has been quantitative in nature (i.e. primarily based on surveys). Only a limited number of qualitative studies exist (Burgmann, 2007). Qualitative research offers in-depth understanding of the IMC process and provides opportunities for theory building. Although a range of empirical studies have focused on the views of advertising executives and marketing executives relating to IMC there have been relatively few *in-depth* studies of the beliefs and opinions of these respondents (Burgmann, 2007; Eagle & Kitchen, 2000b; Hackley, 2003; Hayley, Taylor & Morrison, 2014; Kilgour, 2006). The current research uses qualitative methods - primarily in-depth interviews - to seek the views of senior New Zealand advertising agency and marketing executives regarding the role of the brand identity construct in the IMC implementation process. Qualitative research utilising in-depth interviews of New Zealand advertising executives is rare (Eagle & Kitchen, 2000b; Kilgour, 2006).

1.3.3 The need for Empirical Research Concerning the role of the Brand Identity Construct in the Process of Implementing IMC

It will be seen in Section 2.3.8 and Section 2.3.9 of the Literature Review that this thesis contends that brands are key to the implementation of IMC; that the corporate brand lies at the heart of everything an organisation seeks to do and a product brand lies at the heart of every product-related marketing and marketing communication strategy that an organisation seeks to undertake. This thesis proposes, therefore, that brands are the cornerstone of an organisation's integrated marketing communications strategy, and that a brand identity statement is central to that strategy (Aaker, 1996; 2014; Madhavaram et al. 2005). According to Aaker (1996) the stewardship and implementation of a brand's brand identity is undertaken by a brand strategist. This thesis explores the role of the Account Planner as brand strategist in contemporary creative advertising agencies. Surprisingly, to date only passing mention has been made in the IMC literature on the strategic role performed by the brand identity construct in the IMC implementation process (Ghodeswar, 2008; Madhavaram et al. 2005; Nandan, 2005). There is, therefore,

a need for greater understanding of the role of brand identity in the IMC process. This study is committed to undertaking research that will enhance our understanding of that role.

1.3.4 The need for Empirical Research Relating to the role of the Account Planner in the Formulation of IMC by Advertising Agencies

As alluded to above, this thesis investigates the extent to which the Account Planner in creative advertising agencies plays a highly strategic role in the process of formulating and implementing IMC for their client's brands (refer to Section 2.3.11.2. of the Literature Review in Chapter 2). There is a limited body of empirical research data relating to the role of account planners in advertising agencies (Hackley, 2003; Morrison & Haley, 2003), although there is a growing body of practitioner literature on the topic (Baskin, 2001; Fortini-Campbell, 2001; Steele, 1998; White, 2008). Within that combined body of literature there is no discussion of the role of the Account Planner in the formulation of IMC by advertising agencies. There is discussion of their critical role in preparing the creative brief but no discussion of whether or not they refer to brand identity statements in that process. It would appear that within the extant literature Kelley and Jugenheimer (2011) are the only authors, to date, who discuss the need for account planners to comprehensively understand a brand's identity when planning and managing an IMC campaign. However, in their text Kelley and Jugenheimer (2011) do not mention the 'brand identity' construct as such, but effectively allude to it in their discussions of 'brand positioning', 'brand personality' and 'brand essence'. They make the following comments:

A brand's essence is one or two words that capture what the brand is all about. It sums up the brand's position, its benefits, its personality, and its character in a simple statement (p. 121).

It is crucial to understand every aspect of the brand you are marketing. The goal is to get to the core of the brand or its essence, starting with a fundamental understanding of why the brand was developed in the first place and ending with how it fits into a consumer's life (p. 122).

Kelley and Jugenheimer (2011) further contend that "defining the brand's essence is one of the most important aspects of being an Account Planner" (p. 135).

In contemporary advertising agencies account planners are more likely to be called brand strategists. This research intends to investigate their role in the IMC implementation process and the part that brand identity statements play within that role.

1.4 Methodology

The following is a brief overview of the research methodology adopted in this thesis. Chapter 3 will present a detailed discussion and justification of this methodology.

The research is a qualitative study. Qualitative research is exploratory research, useful for gaining insights and an initial understanding of a research problem (Koslow, Sasser, & Riordan, 2003; Malhotra, Hall, Shaw & Oppenheim, 2002). Qualitative researchers seek to gain an in-depth understanding of their participants' behaviour and the underlying reasons and motivations that govern this behaviour (Malhotra et al. 2002). Qualitative research typically gathers multiple forms of data, such as interviews and documents, rather than rely on a single data source (Creswell, 2009).

This study involves case study research. According to Yin (2009) case studies are typically used when 'how' or 'why' questions are posed. This research utilises a multiple-case study design. Senior executives from five New Zealand creative advertising agencies are interviewed, with each agency representing a single case or 'bounded system' (Bryman & Bell, 2011; Creswell, 2007). The unit of analysis in the study is 'the branding process involved by a single advertising agency in the creation of IMC campaigns for their clients'. Multiple cases allow for cross-case comparisons - what is unique to each case and what is common across all cases (Bryman & Bell, 2011). An advantage of studying multiple cases is that a single set of cross-case conclusions can be drawn (Yin, 2009).

The five advertising agencies selected in the sample conform to predetermined criteria set by the researcher. All five agencies are considered by their peers to be leaders in the field of advertising in New Zealand. Each agency has a history of consistently winning awards in leading international and local industry competitions and rates highly in international industry league tables. In each award winning case their work represents industry 'best practice'. Each agency has a track record that includes numerous successful integrated brand communication campaigns over a number of years - and they all employ account planners.

Two forms of data collection are utilised in this research: in-depth interviews and documentation. The study utilises a multi-stage interview process. The first stage involves semi-structured, in-depth interviews with 18 selected senior agency and client personnel. These interviews serve to mine participants' understanding and action processes in regard to the creation of IMC for a brand. The second stage involves follow-up communication with agency principals to verify that case study data relating to their agency is correct; and to modify it if it is not. The final stage involves creation of a generic Decision System Analysis (DSA) flowchart of the IMC creative process. Although the case study data is gained primarily from in-depth interviews, the exploratory nature of these interviews is balanced by reference to relevant agency documents. These documents provide confirmation of agency philosophy and practice including statements relating to the agency's corporate creative philosophy and research philosophy. In addition, relevant media articles relating to each agency inform the research.

Data analysis includes the careful analysis of transcripts, line by line - and the documentary sources - looking for data that address the research aims and research questions. In Chapter 4 these analyses are presented as five 'within-case' case studies. Each case study includes a Decision System Analysis (DSA) flow chart in which the agency's group decision-making processes are mapped sequentially over time. Proprietary documents obtained from each agency are examined by the researcher to corroborate the verbal evidence provided by participants concerning the philosophy and practice of the agency in regard to the implementation of IMC campaigns for their clients.

In Chapter 5 a cross-case analysis of the five case studies is undertaken. As mentioned above, multiple cases allow for cross-case comparisons and the assumption of cross case conclusions. The replication involved in multiple case studies enhances the possibility of more compelling evidence and more rigorous theory building.

1.5 Outline of the Thesis

Chapter 1: Introduction

Chapter 1 provides an introduction and background to the thesis.

Chapter 2: Literature Review

Chapter 2 presents an examination of the literature associated with the research topic. It commences with a discussion of the brand equity construct and is followed by a critical review of the theoretical foundations of extant IMC literature. Two IMC strategic planning models - proposed respectively by Schultz and Schultz (2004) and Duncan (2005) - are reviewed. The concepts of corporate brand and product brand are discussed; the distinction between corporate identity and corporate image and the relationship between corporate brand identity and product brand identity is explored. A number of brand identity models are examined at length followed by an in-depth discussion of the interface between brand identity and IMC. Madhavaram et al's 2005 brand equity strategy schematic is introduced at this point. It is the theoretical focus of this research, positing the foundational and formative role of brand identity in the IMC process. Four practical expressions of the brand identity concept utilised by marketing organisations are presented; brand books, brand guideline manuals, brand manifestos and 'brand on a page' statements. Research relating to the antecedents and consequences of IMC is evaluated and the role of creative advertising agencies in the IMC process is examined. Research involving New Zealand advertising agencies and IMC is reviewed and research relating to the role of the Account Planner and the creative brief in the IMC process is assessed. Finally, the measurement and evaluation of IMC effectiveness is discussed.

Chapter 3: Research Methodology

Chapter 3 provides a detailed plan of the methodology adopted to investigate the research problem. Nine research questions arising from the literature review are posed to guide the enquiry. Five case studies are proposed based on in-depth interviews with participants from five leading New Zealand advertising agencies; a case study for each agency. Each case study addresses the nine research questions.

Chapter 4: Field Research/Within-Case Analysis

Chapter 4 is the first stage of a two-stage report on the field research. The chapter presents a 'within-case' analysis of each of the five cases. The cases are constructed on the basis of the nine research questions. Each agency is designated a number in order to protect the privacy and confidentiality of those involved. i.e. Agency One, Agency Two, Agency Three, Agency Four and Agency Five.

Chapter 5: Field Research/Cross-Case Analysis

Chapter 5 is the second stage in the presentation of the field research. It involves a ‘cross-case’ analysis in which the five cases are compared across the nine research questions. Twenty seven conclusions from the research are presented and three IMC process models are proffered.

Chapter 6: Conclusion

Chapter 6 concludes the thesis. It reviews the research’s contributions to knowledge; it identifies the limitations of the study and it makes suggestions for future research.

1.6 Contributions

1.6.1 Gaps in Knowledge

In Chapter 2 a number of gaps in the existing body of knowledge relating to the research topic are identified. First and foremost the literature review identifies a lack of empirical research relating to the role of the brand identity construct in the implementation of IMC (Madhavaram et al. 2005). Secondly the literature review identifies a lack of empirical research relating to the role of advertising agency account planners in the implementation of IMC. This is particularly true in regard to the study of New Zealand advertising agencies. The research seeks to address these gaps in the body of knowledge.

1.6.2 Contribution to Knowledge

In Chapter 6 two implications for IMC theory are identified as a result of the research. Firstly, that brand identity statements positively influence the implementation of IMC programmes and, secondly, that account planners also positively influence the implementation of IMC programs. Both of these findings represent significant contributions to the literature.

1.6.3 Contribution to Practice

Chapter 6 also identifies a number of implications for IMC practice. These include the finding that brand identity statements in the form of brand manifestos can positively influence the implementation of IMC campaigns. Secondly, the research concludes that agency account planners can play a highly strategic and positive role in the implementation of IMC campaigns by creative agencies. Finally, the research proffers three new process models that offer instructive and diagnostic value for practitioners in regard to their understanding of the IMC implementation process.

1.7 Chapter Summary and Conclusions

This chapter has laid the foundations for the thesis. It has introduced the research problem and the research objectives. It has offered reasons why the research is justified and has given a brief description of the methodology adopted. The chapter provided an overview of the thesis by way of introducing each of the six chapters that make up the thesis. The chapter provided a preview of the academic and managerial contributions that the research makes to knowledge and to practice.

In Chapter 2 a theoretical foundation for the research is presented.

Chapter 2: Literature Review

Figure 2.1: Structure of Chapter Two

Section	Topic
2.1	Introduction
2.2	Building Brand Equity
2.3	Integrated Marketing Communication
2.4	Chapter Summary and Conclusions

2.1 Introduction

This thesis seeks to determine the role of the brand identity construct in the implementation of integrated marketing communications (IMC) by advertising agencies in New Zealand. In this chapter the brand equity literature and the IMC literature are reviewed in order to identify research gaps relevant to the research.

Fundamental to this thesis is the quest for an answer to the question “How does one implement IMC?” If IMC amounts most fundamentally to the concept of “singing from the same song sheet” (Piercy, 2012, p. 563) - what is in fact that ‘song sheet’? If marketing communications is “the voice of the brand” (Keller, 2001, p. 823) and brand identity is the ‘blueprint’ of the brand (de Chernatony, 2010, p. 266) why is there not more attention focused on the brand identity construct - the ‘song sheet’ in this analogy - in academic papers relating to IMC? If a brand identity statement is in fact the ‘song sheet’ that guides and integrates the combination of ‘voices’ that embody the marketing communication functions (or ‘choir’) promoting a brand, why has the construct been largely overlooked by IMC academics? This chapter examines the extant research and seeks to address these questions.

The context of IMC is marketing and marketing communications. Within this field lies the field of brand equity. Building brand equity is the ultimate goal of IMC (Duncan & Mulhern, 2004; Luxton, 2008; Schultz, 1998). This chapter briefly reviews the brand equity literature before moving on to an extensive discussion of IMC literature. IMC topics discussed include the evolution of the IMC concept, integration and synergy, IMC strategic planning models, the concepts of corporate brand identity and product brand

identity, constructs antecedent to and consequent to IMC, the role of the creative advertising agency in the IMC process, IMC research pertaining to New Zealand advertising agencies; and finally, the role of the Account Planner and the role of the creative brief in the IMC process. A brief review of strategies employed to evaluate IMC effectiveness concludes the IMC section. Concluding comments sum up the chapter.

2.2 Building Brand Equity

2.2.1 The Brand Equity Concept

The brand equity concept first emerged in the 1980s (Barwise, 1993). Advertising agency executives in the United States needed to persuade senior client executives of the value of making long-term investments in brand advertising and they needed some form of financial measurement of these investments. The term brand equity was coined to describe a brand's long-term customer franchise and the financial value of that franchise (Barwise, 1993). The term equity has its origins in the fields of philosophy and law. In ethics the concept relates to fairness; in law to principles of natural justice. It is used in the financial industry to describe the value of a property in excess of the debts for which it is liable.

It was also in the 1980s that brands first began to change hands for large sums of money. As a result of a number of corporate takeover battles and brand acquisitions in this decade the value of a brand as an asset on a balance sheet became a matter of contention and debate (Murphy, 1990). For example, the battle between Nestlé and Jacob's Suchard for control of Rowntree saw Nestlé pay approximately eight times the value of the tangible net assets of Rowntree. This alerted investors and analysts to the fact that companies with strong brands owned assets that were relatively unrecognised but valuable. Subsequently a number of major companies decided to include brand values in their balance sheets and the controversy has raged ever since. Brand equity is now a major topic in business and brand valuations are applied in a number of different areas: in mergers and acquisitions, in brand licensing, in fundraising (where brands have been used as collateral on loans), and for brand management purposes.

There are at least two distinct perspectives when studying brand equity. Firstly, there is what Keller (1993) calls 'customer-based brand equity' (CBBE) which occurs "when the consumer is familiar with the brand and holds some favourable, strong, and unique brand

associations in memory” (p. 1). According to Keller (1993) customer-based brand equity (CBBE) is the outcome, the result, or the effect of consumer response to the marketing of the brand. A brand may have a negative CBBE or a positive CBBE. A second perspective is ‘financial-based brand equity’ which Feldwick (1996) describes as the total value of a brand as a separable asset - when it is sold, or included on a balance sheet. Keller and Lehmann (2005) suggest that in the absence of a market transaction it can be estimated (with great difficulty) from the cost needed to establish a brand with equivalent strength.

There continues to be debate concerning possible ways to value brands and Hague (1997a) acknowledges that there is no simple measure of financial-based brand equity. Different organisations use a range of econometric models and measures of a brand’s financial performance that can be tracked over time. Eagle and Kitchen (2000a) cite Haigh’s (1997b) argument that it is critical to disclose what assumptions underlie such brand valuations in order to assess the margin of error.

The fair valuation of brands is an important issue in today’s business environment and the complexities of financial-based brand valuation cannot be ignored. The cost of building a new brand can sometimes run to hundreds of millions of dollars so buying an existing brand can therefore make sound economic sense. In either regard the financial-based valuation of brand equity is now an essential part of establishing accountability for investments and brand building. Faircloth, Capella and Alford (2001) comment that perhaps the most important contribution of the brand equity concept is “as a metric for discovering the differential consumer behaviour effect of the firm’s marketing mix activities” (p. 61).

While the motivation for the first brand valuations was acquisition accounting, the next development was the adoption of brand value as a brand metric for internal purposes. Seddon (2010) comments:

Almost every large company at some time or other has conducted an internal brand valuation exercise which delivered a brand value number for each division as well as for the company as a whole. In some cases these numbers have been used as Key Performance Indicators (KPIs), where size of management bonuses is impacted by brand value growth (p. 14).

However, Seddon (2010) observes, the drivers of brand value must be calculated in a transparent and robust fashion if more than a limited understanding of how brand value is created, is to be achieved.

2.2.2 The Antecedents of Brand Equity

The debate concerning whether advertising is a ‘strong force’ or a ‘weak force’ (Ehrenberg, 1974) gained momentum in the 1990s with papers by Ehrenberg and colleagues (Barnard & Ehrenberg, 1997; Ehrenberg, Barnard & Scriven, 1998) suggesting advertising is a weak force, while Jones (1990), Barry and Howard (1990), Light (1997) and White (1999) argued a contrary view. ‘Strong’ theories of how advertising works have dominated advertising research, particularly in the United States, since at least the adoption of the AIDA model (Strong, 1925) in the early 20th century. Commonly referred to as ‘persuasive’ or ‘hierarchy of effects’ models, this family of models express the theory that advertising works by changing consumer attitudes about brands. The AIDA model suggests that attention or awareness of a brand precedes interest in the brand, which precedes desire for the brand, which precedes action or purchase of the brand. A number of similar models assume this sequential processing of information involving thinking, feeling, and doing - cognitive, affective and conative components of behaviour (e.g. Colley, 1961; Vaughn, 1980). There is general agreement that attitude changes can be measured in terms of perceptions as well as behaviour (Reis & Trout, 1994).

This sequential process has been incorporated into the contemporary brand theories of Aaker and associates (1991, 1993, 1996, 2000, 2014); Biel (1991, 1992) and Keller (1993, 2003, 2008, 2009). The antecedents of consumer-based brand equity (or brand resonance), according to Aaker and Keller, include brand identity, brand awareness (brand salience), brand image and brand attitude. Keller’s (2003) Customer-Based Brand Equity (CBBE) Pyramid represents the culmination of this thinking.

2.2.3 Customer Equity

The concept of ‘customer equity’ has been defined as “the sum of lifetime values of all customers” (Rust, Zeithamal & Lemon, 2004, p. 110). Customer lifetime value (CLV) is determined by the revenue generated from a customer over their lifetime as a customer, less the cost of acquisition and retention of that customer. Keller (2008) notes:

There is no question that customer equity and brand equity are related... Customers drive the success of brands, but brands are the necessary touch point that firms have to connect with their customers. Customer-based brand equity maintains that brands create value by eliciting differential customer response to marketing activities. The higher price premiums and increased levels of loyalty generated by brands generates incremental cash flows (p. 85).

Building brand equity is the ultimate goal of integrated marketing communications; strategically creating and nourishing long-term, profitable, brand relationships with customers and other key stakeholders (Duncan & Mulhern, 2004). However Duncan and Moriarty (1997) argue that integrating marketing communications is futile if contrary more powerful messages are being sent by other actions of a company. To be effective, Duncan and Moriarty (1997) argue, IMC must be part of a broader, more encompassing, corporately integrated commitment by top management to communication that places as much emphasis on listening to customers and other stakeholders as it does to sending messages to these groups. Such communication builds strong relationships. Creating, retaining and growing profitable brand relationships like this is a cross-functional process that involves all key business activities and takes into consideration all stakeholders (Duncan & Moriarty, 1997).

The chapter will now address the major focus of this thesis; the relationship between the brand identity construct and the integrated marketing communication construct.

2.3 Integrated Marketing Communication

2.3.1 Introduction

This section shifts the conceptual focus of our discussion to IMC. Although the adoption of the term 'IMC' is relatively recent compared to traditional marketing communication concepts such as Advertising and Promotion, there is support for the view that it represents a significant area for future research (Luxton, 2008). This section presents an overview of the IMC literature and selected aspects of Brand literature. There is a strategic focus on the IMC concepts of 'vertical integration' and 'horizontal integration' along with the branding concepts 'corporate brand identity' and 'product brand identity'. The discussion then reviews the role of the creative advertising agency in the IMC process; and in particular the role of the Account Planner in that process. Finally, the challenges inherent in evaluating the effectiveness of IMC are addressed briefly. A range of conceptual models is reviewed as part of the discussion.

2.3.2 IMC Defined: The Evolution of a Concept

IMC is both a concept and a process (Duncan & Caywood, 1996, Duncan & Everett, 1993). Both the concept and the process have been debated now for over 20 years.

According to Kitchen (1999) the first formal, structured attempt to bring some understanding of the concept to the literature was an unpublished study by Northwestern University academics, Caywood, Schultz and Wang, in 1991. However, smaller communication agencies were practising coordinated communication planning for their clients for years prior to 1991 (Duncan & Everett, 1993).

Two concepts have been at the heart of IMC since its inception. The first is 'strategic integration'. The strategic integration of the various marketing communication functions such as advertising, public relations, and sales promotion used by marketers is what made IMC a new and different approach to reaching consumers and other stakeholders. A single basic communication strategy is used as the basis for executing each communications function across a variety of communications channels (Duncan & Everett, 1993). The second basic concept of IMC is 'synergism'. Synergism results from genuine integration and offers both cost saving efficiencies and gains in effectiveness. The concentration of power that results from advertising, public relations, sales promotion, direct marketing, and salesmanship - all firing together and mutually reinforcing each other - is greater than if each function had operated independently (Novelli, 1989).

One of the first definitions of IMC was developed in 1989 by a task force from the American Association of Advertising Agencies (the 4As):

Integrated marketing communications: A concept of marketing communications planning that recognises the added value of a comprehensive plan that evaluates the strategic roles of a variety of communication disciplines - for example, general advertising, direct response, sales promotion, and public relations - and combines these disciplines to provide clarity, consistency, and maximum communication impact (Schultz, 1993, p. 17).

This definition takes the view that IMC is a better way to plan and implement marketing communication programs by tactically combining different communication disciplines for maximum impact. It is described by Schultz (1993) as 'inside-out' (agency and client-based) thinking that neglects to look at marketing communications from a holistic perspective; especially from the customer's point of view - or from the 'outside-in'. Schultz suggests that IMC "starts with the customer or prospect and then works back to determine and define the forms and methods through which persuasive communication programmes should be developed" (p. 17). According to Schultz (1993), all of a brand's contacts with customers or prospects - whether it be through packaging, media

advertising, comments by friends or family, or the quality of the customer service that they receive - deliver brand messages. IMC planning must concern itself with each and every encounter that customers and prospects have with the brand and monitor these experiences to ensure that maximum value is added to the consumer's perception of and relationship with the brand through consistent, positive messages and positioning.

This view was summarised by Schultz and his Northwestern University colleagues in the following definition:

IMC is the process of managing all sources of information about a product/service to which a customer or prospect is exposed which behaviourally moves the consumer toward a sale and maintains customer loyalty (Schultz, 1991).

By 1996 Phelps and Johnson were lamenting the fact there was no generally accepted definition of IMC. They observed that IMC appeared to mean dramatically different things to different people. Duncan and Caywood (1996) agreed with this observation:

Although most people agree that (IMC) is conceptually a good idea, there is still little agreement about what it truly means and even less agreement about 'how to do it'. And to make things even more confusing, both the concept and the process continue to evolve (p. 14).

They proposed the following definition of IMC - first presented by Duncan and Moriarty (1994):

IMC is the process of strategically controlling or influencing all messages and encouraging purposeful dialogue to create and nourish profitable relationships with customers and other stakeholders (Duncan & Caywood, 1996, p. 18).

In this definition IMC is more than just about co-ordinating communication tools, it is a strategic process. It is a relationship-based dialogue, not only between the brand and its customers and prospects, but also between the organisation and all of its stakeholders. Duncan and Moriarty's definition moves the IMC concept beyond relationships with just an organisation's trade and consumer target audiences to include employees, stockholders and regulators. In fact, it includes anyone who has a direct or indirect impact on an organisation's operations and profitability.

The following definition of IMC was first proposed by Schultz and Schultz in 1998:

IMC is a strategic business process used to plan, develop, execute, and evaluate coordinated, measurable, persuasive brand communication programs over time with consumers, customers, prospects, and other targeted, relevant external and internal

audiences. The goal is to generate both short-term financial returns and build long-term brand and shareholder value (Schultz & Schultz, 1998, p. 18).

Schultz and Schultz (1998) suggest that perhaps the most important characteristic of this definition - and what differentiates it from earlier definitions - is its focus on IMC as an ongoing 'strategic business process' rather than as the mere 'tactical' integration of various communication tools. Schultz and Kitchen (2000a) further note, when discussing this definition, that a key focus of the definition is the focus on 'strategy'. This refers to a communication strategy that is built on the corporate brand (which provides a core sense of meaning and identity, values and corporate mission) but equally relates to the individual brand (the individual brand's identity, mission and values). Schultz and Kitchen (2000a) comment: "At both levels executives will need to develop resonance and consonance in terms of brand identity" (p. 65). The definition also includes reference to strategic brand communication programmes 'over time'. Schultz and Kitchen (2000a) argue that the IMC concept must focus on long-term outcomes such as building strong brand relationships with relevant stakeholders, over time - and these outcomes should be both measurable and accountable.

Further to the above discussion, Schultz and Kitchen (2000a) emphasise the fundamental role of the brand in the integration process:

The brand is the key to integrated marketing... Undoubtedly, the brand has become or is becoming the dynamic hub around which all marketing effort and communication revolves. Consumers ultimately own all brands. Firms create brands, but consumers own brands. Firms strive to create brand identities; consumers give brands imagery... For many companies the brand is a twofold entity. The first entity is the brand consumers encounter... But consumers increasingly want to know more of the company behind the brand (the second entity). The corporate brand... gives an overall sense of meaning... to the basketful of individual brands within its portfolio (pp. 55-56).

Duncan and Mulhern (2004) concur with Schultz and Kitchen (2000a) when they observe that:

In IMC the brand is the integrator and communication is the glue and catalyst that can hold the MC functions together to produce a synergistic effect... Brands are something that live in the hearts and minds of customers and other stakeholders. Keeping this in mind, all decisions should be screened for how they affect the brand. When this is done, the brand becomes the integrating element (pp. 14-15).

By 2008 the lack of agreement concerning a universally accepted definition of IMC was continuing to cause concern amongst academics (Kerr, Schultz, Patti & Kim, 2008). Kerr,

et al. (2008) compiled a table of seven definitions which they considered, through citation and usage, best represented the evolution in understanding of the IMC concept. Among other definitions the table includes the 4A's (1989) definition, Schultz's (1991) definition, and Schultz and Schultz's (1998) definition (adopted by Schultz and Kitchen, 2000a and Schultz and Schultz, 2004), all discussed above. In addition they include the following definition by Kliatchko (2005) in the table:

IMC is the concept and process of strategically managing audience-focused, channel-centred, and results-driven brand communication programmes over time (p. 23).

Kliatchko (2005) suggests that his definition emanates directly from the framework proposed by Schultz and Schultz (1998) but expresses the nature and essential qualities of IMC with greater precision and clarity. He further suggests that this definition highlights the three distinctive attributes, or pillars, of IMC: audience-focused, channel-centred, and results-driven.

In 2008 Kliatchko proposed a revised version of his 2005 definition:

IMC is an audience-driven business process of strategically managing stakeholders, content, channels, and results of brand communication programs (p. 140).

This definition includes the addition of a fourth IMC pillar; namely 'content'. Kliatchko (2008) argues that although some may suggest that content is implicit in the term 'marketing communication' he believes it is important to include it in the definition as it is "the very impetus that induces persuasion in communication" (p. 140).

In his 2009 paper Kliatchko revisits the seven IMC definitions tabled by Kerr, et al. (2008) as the most commonly cited definitions of the previous 20 years and evaluates them against the four key criteria (or pillars) identified in his 2008 IMC definition. He concludes that Schultz and Schultz's 1998 definition and his own 2008 definition are the only definitions that address all of the critical elements required for a comprehensive IMC definition.

For the purpose of this research Schultz and Schultz's 1998 IMC definition will be adopted as the benchmark. In spite of Kliatchko's (2005 and 2009) argument that his 2008 definition is more concise and precise than the Schultzs' definition it is the writer's view that the Schultz and Schultz (1998) definition more comprehensively describes the IMC concept and process. Apart from the important aspects of their definition discussed

above, Schultz and Schultz's definition also spells out the concept that Kliatchko simply refers to as 'stakeholders'. Schultz and Schultz expand the concept to include "consumers, customers, prospects, employees, associates and other targeted relevant external and internal audiences". In this definition it is significant that Schultz and Schultz include 'employees' as an important part of the IMC process - for employees must assume the strategic role of being ambassadors for the brand that they represent. They are the human face of the brand to the consumers, customers and prospects that they interact with and play a critical role in the development of positive brand relationships with these important stakeholders (Belch, Belch, Kerr & Powell, 2014).

However, leading IMC scholars concur that agreement relating to a single definition of IMC has yet to occur (Moriarty & Schultz, 2012; Rose, 2012). Although the foundational concepts of IMC have been with us from IMC's earliest days...

most of these concepts and constructs have changed as the field of IMC has matured. Thus, rather than a single concept, IMC represents a group of concepts. The challenge to scholars is to understand the interrelationships between and among them. Because these concepts work together, it is difficult to arrive at one single explanation, or even definition, of IMC (Moriarty & Schultz, 2012, p. 491).

IMC is a complex system. It includes the concept of total, multi-way, interactive brand communication; it includes the premise that consistent brand messages drive synergy; it proposes that brand value is created through reciprocal stakeholder relationships, and it suggests that cross-functional, outside-in planning delivers effective brand communications and organisational returns (Moriarty & Schultz, 2012).

"The IMC world, to a major extent, is still in its infancy: it is still developing and, consequently, changing" (Rose, 2012, p. 563). As has been stated above, IMC is both a concept and a process - and both the concept and the process continue to be debated. However for this research Schultz and Schultz's 1998 definition (above) will serve as the benchmark.

2.3.3 The Nature of IMC

The notion of integrated marketing communications is not a new idea; it has been around now for almost 30 years. Schultz and Kitchen (2000a) argue that "Integrated marketing communication (IMC) was the major communication development in the last decade of the 20th century" (p.61). The concept first developed back in the late 1980s and early 1990s. IMC was initially a response to changes in the marketplace, changes in

technology, and changes in consumer behaviour. It is interesting to note that the same forces continue to drive the adoption of IMC today: further changes in the marketplace, further changes in technology, and further changes in consumer behaviour (Kitchen & Schultz, 2009).

Some of the marketplace changes that drove the initial adoption and implementation of the IMC concept and practice in the 1990s were identified by Schultz et al. (1993) and Duncan and Caywood (1996) as follows:

The death of mass marketing. The collapse of the mass media (particularly network TV) shook the foundations upon which marketing and advertising were based. Assumptions, strategies and tactics for reaching mass audiences with a single selling message via the mass media were no longer valid. The fragmentation of the media was a determining factor. Along with the arrival of new media platforms such as video, cable and satellite television there was a parallel increase in the number of magazines and radio stations, and an increase in the popularity of targeted media such as direct mail and print catalogues. In addition, universal access to computers and the Internet gave rise to 'the age of the individual' - along with the means to service it. Economies of scale no longer guaranteed profitability; niche marketing replaced mass marketing (Schultz et al. 1993).

Additional factors were the increase in mass media costs but a decrease in message impact and credibility; the increase in media fragmentation resulted in audience fragmentation; there was a decrease in the cost of using databases; an increase in the power of the retailer; an increase in client expertise; an increase in global marketing, and an increase in pressure on the bottom line (Duncan & Caywood, 1996).

Social changes were also having dramatic impact on the marketplace. The family unit was significantly redefined. Families were having fewer children but were increasingly led by single parents. Increasing numbers of women were working outside of the home - dad was no longer the only breadwinner - and educational levels were higher. There was a higher proportion of senior citizens with a high concentration of wealth and a tendency to live longer (Schultz et al. 1993).

These significant changes in the marketing arena required similar significant changes in the planning and execution of marketing communications. It was time for a different approach to advertising:

Respectful, not patronising; dialogue-seeking, not monologic; responsive, not formula-driven. (Advertising) that speaks to the highest point of common interest, not the lowest common denominator...Advertising that is perceived as an investment, and as such is held accountable for specific results (Schultz et al. 1993, p. 13).

Duncan and Mulhern's (2004) 'White Paper on the Status, Scope and Future of IMC' seeks to identify a number of key IMC principles and practices that differentiate IMC from previous marketing communication practices. The report reflects the thinking of a group of leading IMC academics and professionals of the day. Duncan and Mulhern (2004) suggest that IMC is a set of principles and practices that, when combined with traditional advertising and promotional principles and practices, create and maintain customer relationships that, in turn, build strong brands and brand equity. The key principles and practices are summarised in Table 2.1.

Table 2.1: Principles and Practices that Differentiate IMC from Previous MC Practices

1)	Customer-focused (based on 'outside-in' thinking)
2)	Advertising and promotion driven by cross-functional planning and monitoring
3)	All advertising and promotion messages strategically consistent
4)	Brand positioning integrated into all brand messages
5)	All customer touch points impact the brand and brand equity, not just advertising and promotional messages
6)	Planning based on prioritized SWOTs
7)	Interactive, two-way communication just as important as one-way mass media messages
8)	Customer expectations, not customers, are managed
9)	Retaining and growing customers as important, if not more so, than acquiring customers
10)	Transactions are 'relationship' building blocks - each transaction strengthens or weakens a customer-brand relationship
11)	Segmenting and targeting is database driven
12)	IMC is an on-going, interactive process (that incorporates linear campaigns)
13)	Planning is driven by financial measurements

Source: Duncan & Mulhern, 2004, p. 10

The nature of the new IMC paradigm is examined further by Kliatchko (2008) who observes that the IMC business process “aims to strategically manage the total customer experience by understanding customer needs, wants, desires and behaviour in the marketplace, and align the entire organisation to meet those customer requirements” (p. 143). This involves focusing on key strategic and managerial issues at both the corporate level and the operational level. Senior management create a culture of marketing where marketing communications is viewed as a strategic management tool and investment. Kliatchko’s (2008) contribution to IMC includes a review and analysis of the literature

along with models that endeavour to synthesise the various views that have defined the IMC concept over time.

Table 2.2 is a summary of Kliatchko’s (2008) analysis of the difference in perspective between traditional approaches to marketing communications and the IMC approach.

Table 2.2: Kliatchko’s (2008) Old and New Marketing Communications Paradigms

Traditional Marketing Communications Perspective	IMC Perspective
• Mass marketing and mass communication mindset	• One-to-one marketing approaches
• Transactional models of marketing	• Relational models of marketing
• Product-focused business and marketing strategies	• Consumer-focused business and marketing strategies
• Marketing to a broad, average consumer with similar traits	• Marketing on the basis of behavioural differences of consumers
• Marketing on the basis of product features	• Providing customer solutions and customer benefits
• Focus on outputs of marketing communication activities	• Focus on outcomes of marketing communication activities
• Emphasis on customer acquisition	• Emphasis on customer retention
• Intuition/gut feel-based marketing	• Fact-based marketing
• The 4Ps of marketing (product, price, place, promotion)	• The 4Cs of marketing (consumer, consumer costs, convenience, communication)
• Advertising monologue	• Consumer dialogue
• Mass, generic, unknown audience	• Known prospects and consumers
• Mass, shotgun messages	• Targeted communications
• Traditional tri-media mindset	• Multiple, relevant, interactive, digital contact points and media neutrality
• Bombarding audiences with advertising messages	• Building relationships
• Focus on USP (unique selling proposition)	• Focus on EVP (extra value proposition)
• Attitudinally-based market research methods (e.g. Brand recall, brand awareness)	• Behavioural and accountable measures

Source: Adapted from Kliatchko 2008, p.142

By way of summarising this discussion it can be asserted that scholars agree that IMC involves all of an organisation’s communication (one-way and two-way interactive); is customer focused (based on ‘outside-in’ thinking); is driven by cross-functional planning; requires all communication to be strategically consistent - with the brand positioning integrated into all brand messages, including all consumer interactions with the brand (‘brand touch points’). IMC recognises the significance of all stakeholders beyond

customers. IMC planning is underpinned by organisational objectives and involves the management of customer expectations, with the customer-brand relationship being the central tenet. Segmentation and targeting are database driven and the planning process is ongoing and interactive; driven by financial measures of contributions to brand performance.

The next section will discuss two major attributes of IMC; integration and synergy.

2.3.4 IMC: Integration and Synergy

Integration and synergy are two concepts that have been at the heart of IMC since the idea was first mooted in the late 1980s (Caywood et al.1991). Up until that time the IMC paradigm did not exist. It was the norm for marketing academics and practitioners to consider that each marketing communication function (advertising, sales promotion, publicity, etc.) operated as autonomous, segregated, discrete disciplines. This segregation was reflected in the fragmented structure of the marketing communications industry of the day with specialist agencies operating in relative isolation to each other (Duncan & Mulhern, 2004).

In contrast, “IMC attempts to combine, integrate, and synergise elements of the communication mix” (Kitchen et al. 2004, p. 20). Integration recognises not just the value of each discipline, but also the value of combining these disciplines together in juxtaposition so that the strengths of one discipline can offset the weaknesses of another. This idea of tactically combining promotional elements has grown dramatically in popularity in recent years because advertisers believe that it will enhance the impact of their marketing communications; that it will create synergy. The strategic bundling together of promotional mix elements became known as ‘speaking with one voice’; the coordination of messages for maximum impact (Grove, Carlson & Dorsch, 2007).

Pickton and Hartley (1998) identify a range of nine dimensions of integration which need to be considered if the full benefits of integration are to be realised. They include: (1) Promotional mix integration, (2) Promotional mix with marketing mix integration, (3) Creative integration, (4) Intra-organisation integration, (5) Inter organisation integration, (6) Information and database systems integration, (7) Integration of communications targeted towards internal and external audiences, (8) Integration of corporate (identity) and ‘unitised’(product, brand or trade) communications, and (9) Geographical integration.

Pickton and Hartley (1998) suggest that a significant number of the above dimensions relate to organisational issues, and “it may be argued that the most important implication of IMC is the impact it has on organisational structure, systems, relationships and management. Unless these facets are addressed, it is unlikely that any true sense of integration can be achieved” (p. 458). They further argue that the greater the degree of integration achieved, the greater the synergy and the greater the positive results.

While acknowledging that it is highly desirable to have all functions of an organisation ‘integrated’ Hutton (1996) contends that few scholars or practitioners would argue for non-integrated communications! Schultz (1996) takes a more profound view, suggesting that the question whether to integrate or not is moot because in fact it really doesn’t matter. The consumer will integrate an organisation’s marketing communications whether the marketing or advertising organisation does or does not:

Integration in truth is not up to the marketer, it is up to the consumer. Thus even if the marketing or advertising organisation has decided to direct totally uncoordinated messages to the same consumer, that consumer will aggregate and integrate those communication messages in some fashion. Unfortunately, that fashion might be to (1) arrange the messages as the advertiser intended, (2) ignore the messages and materials, or (3) put them together in ways the advertiser or marketer never considered, ways that might even be harmful to the marketing organisation and the brand. Thus, integration occurs whether the marketer or advertiser plans it or not (Schultz, 1996, p. 139).

Schultz (1996) suggests that the best that marketers and advertisers can do is to modify and manage their strategies and practices to maximise the return on the integration which occurs naturally.

So what are the benefits of integration to the marketing organisation? Fill (2009) suggest that one of the drivers creating interest in IMC is an organisation’s need to become increasingly efficient. Driving down costs enables managers to improve productivity and profits. At an organisational level the integration of cross-functional departments (advertising, public relations, etc.) into a single communications department reflects this drive for efficiency (Low, 2000). This coordination of brand development allows management time to be utilised more productively (Burgmann, 2007).

In the communication marketplace increased message clutter calls for increased message effectiveness through the consistent reinforcement of core brand messages. IMC does this. Communication effectiveness has been further enhanced by the advent of

technological advances such as database technology and the Internet (Burgmann, 2007). These developments have provided extra impetus for an organisation to implement a more integrated communication strategy through the generation of more precise, insightful and measurable communications (Fill, 2009).

IMC today represents an important element in an increasingly integrated world where, ideally, integrated thinking is applied to all marketing and management decisions; where an organisation seeks to encourage all of its employees to embrace a common corporate philosophy, based on common corporate values and expressed through customer-focused marketing and marketing communications. This concept has been being called 'vertical integration' (Duncan & Moriarty, 1998). IMC includes not just the integration of marketing communications (a concept which Duncan and Moriarty (1998) refer to as 'horizontal integration') but also the integration of marketing planning itself - which devolves from integrated corporate planning, a business strategy that emerges from the most senior levels of an organisation. Some have called this corporate level oversight 'Integrated Brand Communication' - where all communication is driven by the fundamental values and positioning of the umbrella corporate brand and must be consistent with these values and positioning (Aaker, 2008; Burgmann, 2007; Duncan & Moriarty, 1998; Duncan & Mulhern, 2004). The concepts of vertical and horizontal integration will be discussed further below.

International brand consultancy, Interbrand, advocates the Integrated Brand Communication concept. It is encapsulated in their Brand Strategy Model (refer to Figure 2.2).

Figure 2.2: Interbrand's Brand Strategy Model: Integrated Brand Communications



Source: Interbrand Brand Toolbox (2013) p. 29

Interbrand (2013) contends that an organisation's brand strategy should be the servant of the organisation's business strategy and that the responsibility for delivering the brand into the marketplace should be shared by all of the departments within an organisation. This role should not be the role of just the Marketing Department. Interbrand (2013) proposes that brand strategy should sit right at the heart of a business and its culture. They believe that brand strategy has evolved from being just part of marketing to being the primary means by which the business strategy is infused throughout the entire organisation and delivered to stakeholders (Interbrand, 2013).

Integration, therefore, "is the combining of separate parts into a unified whole" (Duncan, 2005, p. 21). However, if firms are to integrate their external marketing communications they must first achieve that integration internally (Duncan & Moriarty, 1998) for integration issues are often organisational issues (Pickton & Hartley, 1998). IMC requires a high degree of interpersonal and cross functional communication within an organisation and across business units (Madhavaram et al. 2005).

A further benefit attributed to IMC is synergy. It is an outcome of integration (Duncan, 2005; Pickton & Hartley, 1998). Research on the role of synergy in multimedia

communications is scarce (Naik & Raman, 2003; Chang & Thorson, 2004). Synergy is a phenomenon whereby the combined effect of multiple communication tools working together exceeds the sum of the tools used individually in an uncoordinated fashion (Shimp, 2010). Naik and Raman (2003) determine, in a study of Levi Strauss's Dockers brand, that the combined impact of well-coordinated multiple marketing communication tools (television and print) can be much greater than the sum total of their individual effects. Reid (2003) similarly contends that IMC ensures synergies where the use of multiple communication tools is mutually reinforcing and which, in turn, lead to enhanced brand performance. Further, Chang and Thorson (2004) demonstrate that television and online advertising, used in conjunction, produce positive synergistic effects that are additional to each medium's individual effects.

Historically, IMC has been implemented at a lower organisational level, through strategic planning and the conceptual linking of messages and execution and the co-ordinated mixing of traditional and non-traditional communication channels. The goal of this expression of integration is to produce message synergy.

Moriarty and Schultz (2012) describe the process as follows:

Message consistency is presumed to lead to communication efficiency and effectiveness. Efficiency based on synergy (the idea that $2+2 = 5$) served as a starting point for the development of IMC practices in the late 1980s and early 1990s. The benefit of message consistency is synergy, which means that marketing communication can be more effective, efficient, and generate greater combined impact - meaning all of them connected together have more impact than single messages delivered on their own would have. In other words, the benefits of synergy (more impact) accumulate if messages from various areas are co-ordinated around a common theme or delivered at a particular time (Moriarty & Schultz, 2012, p. 495).

Synergy is the creation of linkages in a receiver's mind as a result of messages that connect. The combined effect of repeated linkages create impact beyond the power of any one message on its own. Maximum brand communication synergy occurs when every interaction between a brand and its prospects, customers or other stakeholders results in the reception, by these respondents, of consistently positive brand messages and experiences (Moriarty, 1996). Synergy then is a function of memory and a product of integration (Kerr, 2003).

Although the value of a single, unified, consistent message was the battle cry that launched the original 'one sight - one sound' approach to IMC in the 1980s, according to

Moriarty and Schultz (2012) it has been difficult to test its real value in the marketplace. Assael (2011) contends that it was not until the advent of the Internet (after 1994), that the concept of synergy came to be increasingly identified with the effects of the interaction between media. Prior to that media planning and effectiveness research focused on individual media. Today the focus has shifted to the interaction between media and ROI measures of interactive media effectiveness. However, Assael (2011) ruefully observes that the promise of cross media research has yet to be achieved - primarily because of a lack of reliable measures of cross media effects. The plethora of new digital platforms offering messaging, hypertext, and rich interactivity have changed the rules of consumer engagement. Varan, Murphy, Hofacker, Robinson, Potter and Bellman (2013) suggest that in the 21st century devices rather than media may be more appropriate items of measurement and comparison. Interactivity now covers a full spectrum of devices which offer video, sound, and text.

Although synergy has clear strategic and financial implications for marketers it remains under-researched and inconclusive (Assael, 2011).

The technology resulting in the proliferation of media has outstripped the means to measure cross media effectiveness. Until adequate measures of interactive media effects are developed, cross media research will not reach its full potential (Assael, 2011, p. 42).

However, Assael (2011, p. 54) contends, “IMC remains the most promising paradigm to achieve media synergy.” He suggests that future research needs to investigate the differential effects of sequential versus simultaneous cross media exposure; it also needs to investigate the effects of online ads on offline effectiveness (and the reverse), and, perhaps most importantly, budgetary allocation guidelines that can be provided by cross media effects.

By way of concluding this section, Madhavaram et al (2005), in a paper seminal to this thesis, propose that the synergistic effect or outcome of IMC can, in turn, lead to stronger customer-based brand equity (Keller, 1993). In support of this notion Luxton’s (2008) empirical research affirms the proposition that IMC has a direct and positive association with brand performance and financial performance. Research by Madhavaram et al. (2005) and Luxton (2008) will be discussed further below.

2.3.5 Levels of Integration

Many scholars have noted that the IMC concept has changed as the discipline has matured (Kitchen et al, 2004; Laurie & Mortimer, 2011; Moriarty & Schultz, 2012; Rose, 2012; Zabkar, Vanita & Mumel, 2013). What started as a desire for message consistency - consistency in sight and sound - is now a desire for strategic consistency. “While IMC was first seen as a marketer interacting with the customer, the concept has broadened to all of management interacting with all stakeholders” (Rose, 2012, p. 563).

Today brand communication involves much more than just ‘planned’ marketing communications. Every encounter with a brand shapes a respondent’s perception of that brand. From the packaging, livery or signage of the brand to the performance of the product or service - from the moment of purchase; the integrity of the organisation’s after-sales service and performance; the organisation’s attitude and response to stakeholder initiatives through social media or other media; from the planned messages communicated through the media to the uncontrolled and unplanned messages conveyed by word of mouth; to perceptions gained from interaction with company personnel or with the corporate body. It is evident that managing brand communications and relationships with an organisation’s stakeholders is becoming increasingly challenging and complex. Everything that an organisation does or does not do sends a brand message. It cannot not communicate (Duncan & Moriarty, 1998).

It can be concluded therefore that to believe that planned marketing communications is the only or even the primary source of brand messaging is a somewhat naive, simplistic and unrealistic understanding of communication in today’s marketplace. The initial domain of IMC, the integration of all planned marketing communications, continues to remain fundamentally important to marketers but does not preclude them from the consideration of other levels of brand message management as well; the management of the broad spectrum of corporate and marketing brand messages.

Pickton and Hartley (1998, p. 449) observe that:

There are many levels and dimensions to integration which all pose their individual and collective difficulties. To be implemented, IMC requires the involvement of the whole organisation and its agents from the Chief Executive downward. It needs consideration from the highest corporate strategic level down to the day-to-day implementation of individual tactical activity.

IMC can be conceived at two distinct levels: at a strategic level (as a management philosophy) and at a tactical level (as a process of campaign development connected to a wider brand strategy) (Duncan & Mulhern, 2004; Reid et al. 2005). The strategic dimension is the framework that provides guidance for tactical actions, and is in turn shaped by the reaction of consumers and competitors to those actions. The tactical dimension relates to short short-term tactics designed to implement those strategies. This dimension has also been called message integration (Kerr, 2003). In addition, these two dimensions have been characterised as vertical and horizontal integration (Duncan & Moriarty, 1998).

Vertical integration requires that marketing and communication objectives be aligned with higher-level corporate objectives and corporate missions, whereas horizontal integration focuses on the marketing mix and coordination across business functions such as production, finance, and distribution (Reid et al. 2005, p. 13).

The above distinctions are consistent with Petrison and Wang's (1996) proposal that IMC includes both planning integration (vertical) and executional integration (horizontal).

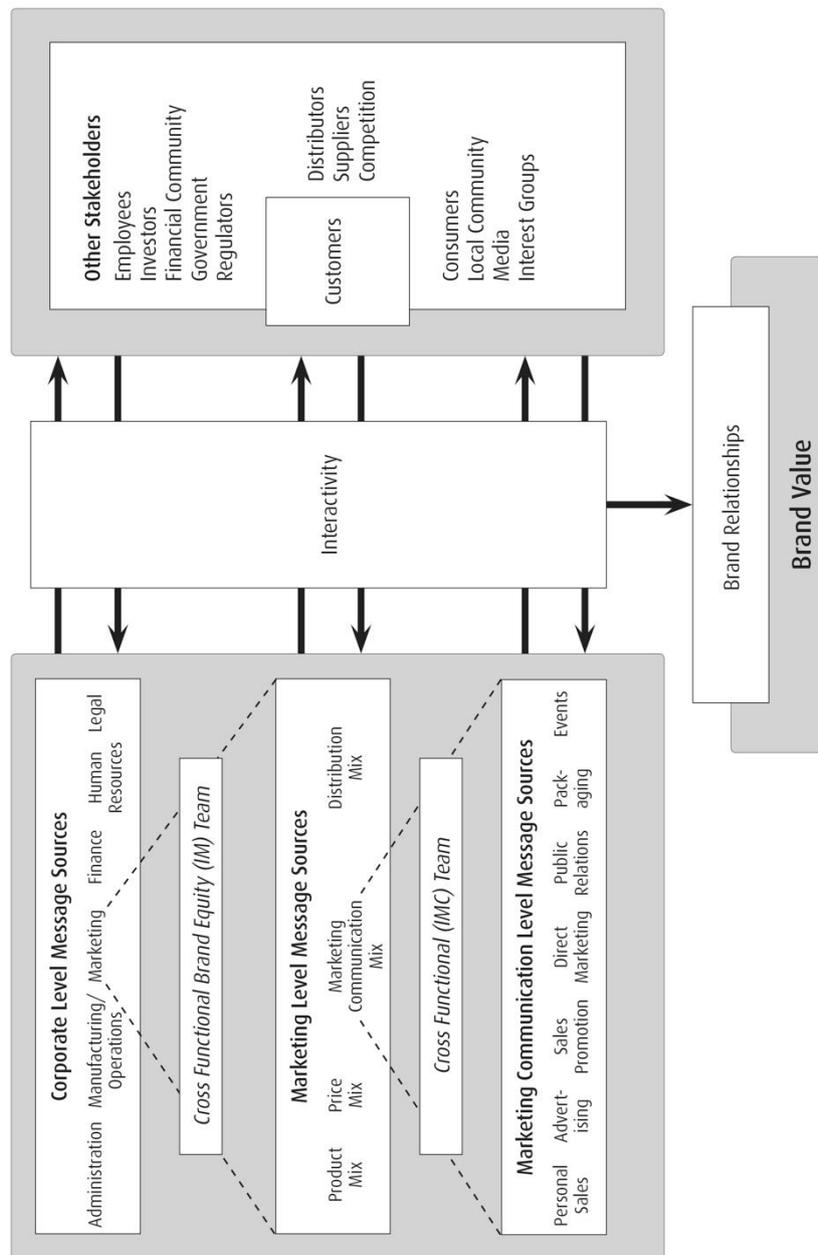
As part of this discussion Duncan and Moriarty (1998) argue that communication is the central integrative process in marketing:

Although persuasion has an important role in marketing, when persuasion is foremost it places undue emphasis on transactions and the short term. When communication is foremost and listening is given as much importance as saying, interactive relationships become the focus (Duncan & Moriarty, 1998, p. 2).

Duncan and Moriarty (1998) observe that many companies have concluded that their most valuable assets are their relationships with their customers and other key stakeholders and that the net sum of these brand relationships is a major determinant of brand value. Duncan and Moriarty (1998) also observe that customers and other stakeholders automatically integrate brand messages. The challenge for marketers then is how to best manage this integration in a relational context; how to recognise and manage the indirect and the implied and the hidden communication dimensions of all brand contacts at all marketing and corporate levels?

Figure 2.3 is Duncan & Moriarty's (1998) Communication-Based Marketing Model for Managing Relationships.

Figure 2.3: Communication-Based Marketing Model for Managing Relationship



Source: Duncan & Moriarty (1998) p. 9

Duncan and Moriarty (1998) suggest that brand messages originate at three levels (refer to Figure 2.3); first there is the corporate level, secondly there is the marketing level and thirdly there is the marketing communications level. In other words, communication effects are generated by corporate activities, by marketing mix activities as well as by planned marketing communications.

Firstly, then, a company's corporate business practices and philosophies create communication effects. These business practices and philosophies are normally exemplified by the behaviour of the most senior corporate executives in an organisation. For example, the prevailing corporate culture of a company can significantly influence how staff relate to customers and other stakeholders. The corporate culture is determined and modelled by senior corporate executives and the messages that emanate from such a culture will inevitably confirm, strengthen, or weaken brand relationships with consumers and other stakeholders.

Secondly, at the marketing level, brand messages relating to the marketing mix must also be managed carefully for consistency. Brand messages are generated by product performance, appearance and design while pricing and distribution strategies and practices also generate messages and perceptions about a brand. As well, brand messages relating to service are communicated by the attitudes of distributors, sales staff, secretaries and receptionists as they relate to customers and clients. All of these interactions inevitably impact brand perceptions and relationships.

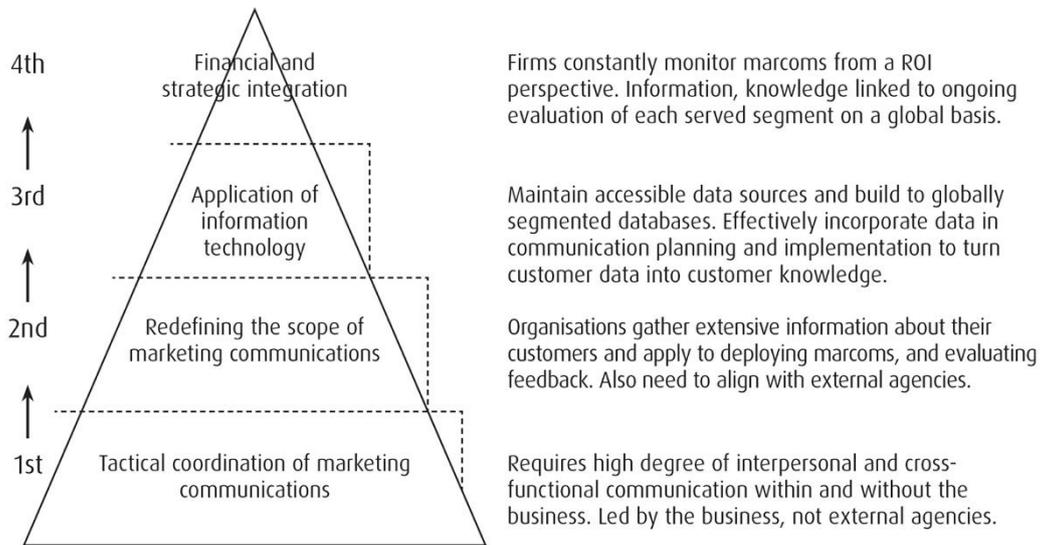
Recognising and managing the indirect, implied, and hidden communication dimensions at all marketing and corporate level brand contacts is necessary if a company wants to maximise profitable brand relationships (Duncan & Moriarty, 1998, p. 7).

Thirdly, Duncan and Moriarty (1998) discuss the marketing communications level. At this level there should be executional consistency across all planned marketing communications messages. Whatever the marketing communication discipline - whether it be advertising, public relations, sales promotion, direct response, or digital - there should be a consistency of tone and voice, a consistency in the expression of brand personality and a consistent commitment to core brand values - displayed through all brand activities.

In summary, there should be strategic consistency across all brand messages in the way that corporate values are presented, in the way that products perform and in the way that the brand is presented and positioned.

The proposition that integration should be managed at multiple levels in a corporation is also addressed by Schultz and Kitchen (2000a), whose "Four Levels of Integration" model is reprised by Eagle and Kitchen (2004) and Kitchen et al. (2004), shown in Figure 2.4.

Figure 2.4: IMC - A Four Stage Model



Source: Adapted from Schultz & Kitchen (2000a); p. 62 (in Eagle & Kitchen, 2004)

Schultz and Kitchen (2000a) propose four levels, or stages, of IMC. The first level they call the ‘Tactical Coordination of Marketing Communications’. This involves the coordination of all the promotional elements in a marketing communications campaign. This is termed one-way, inside-out marketing and requires little or no focus on customers and consumers or their needs and is a relatively simple matter of bundling promotional mix elements together so they speak with one voice (Kitchen et al. 2004). They suggest that such a product, production or sales orientation, is the antithesis of the IMC concept as defined by Schultz and his colleagues in the last decade of the 20th century (Schultz et al. 1993).

The second level is entitled ‘Redefining the Scope of Marketing Communications’. At this stage organisations gather extensive information from their customers and evaluate customer feedback to their marketing communications, which they then align with their external agencies. Schultz and Kitchen (2000a) suggest that this is the first stage or level to represent outside-in marketing (in their view, a defining distinctive of IMC). At this stage organisations actively seek customer or consumer feedback to their marketing communications and whether the organisation is meeting customer needs or not.

The third stage they call the ‘Application of Information Technology’. This is when databases are built and maintained and data is effectively incorporated into

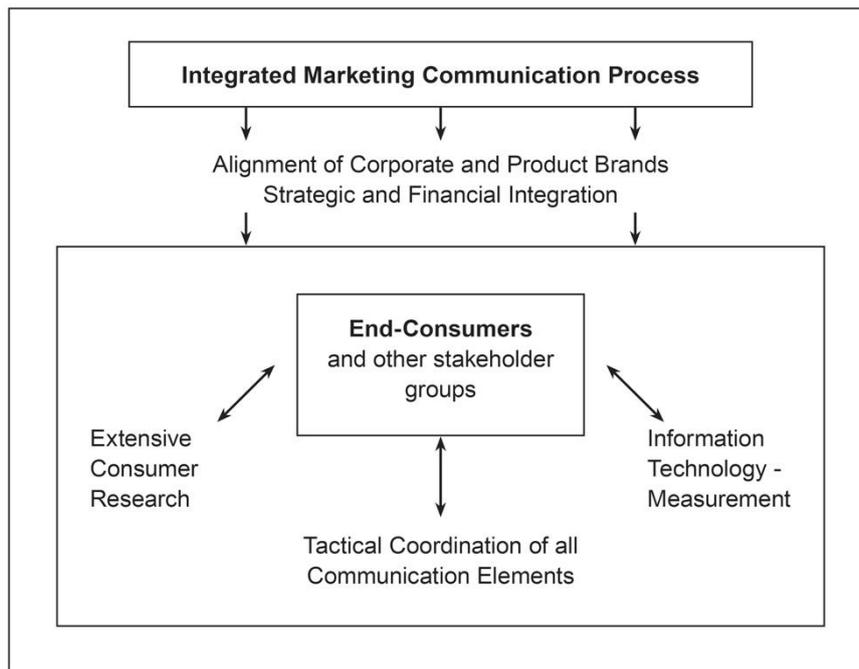
communication planning and implementation. It is here that integration moves beyond juxtaposition of the promotional mix elements to customer-focused, informed decision making based on segmented databases. Customer data is turned into customer knowledge.

The fourth and ultimate stage is called 'Financial and Strategic Integration'. This is where organisations constantly monitor marketing communication performance from an ROI perspective and where communication investment is measured against actual changes in customer behaviour. Tactical marketing communications objectives are measured against strategic corporate goals. According to Schultz and Kitchen (2000a) it is only at this level that integrated marketing can be said to really occur. However, research suggests that very few organisations operate at this level (Burgmann, 2007; Kitchen et al. 2004).

Schultz's and Kitchen's (2000a) model was incorporated by Burgmann (2007) into her Ph.D. research in an endeavour to understand how IMC is implemented. Burgmann (2007) found that most of her respondents had difficulty in positioning their company in Schultz and Kitchen's (2000a) model and concluded that the model "may not reflect the realities for a number of market sectors" (p. 240). For example, five of the companies interviewed did not have a database because their products were mass produced and they could see little value in having individual customer data; two additional companies did not have a database due to legal restrictions and another company did not have a database because of the nature of its product.

Burgmann (2007) consequently proffers a revised version of Schultz and Kitchen's four stage model (refer to Figure 2.5). This model retains the four stages of integration, but rather than being presented in the sequential form of a pyramid, the stages are presented next to each other and "represent steps which can be accomplished simultaneously in order to implement IMC" (p. 241).

Figure 2.5: The IMC Process



Source: Burgmann (2007) p. 410

Burgmann's (2007) model places the consumer and other stakeholder groups at the centre of attention; the focus of all communication, research activities and technologies. These three activities represent consumer-driven ways the company can interact with its stakeholders. The fourth and final step; the organisation's strategic and financial integration, is placed outside the inner box "because this procedure is directly carried out by the internal communication department within specific companies" (p. 409). In addition, Burgmann contends that the organisation needs to ensure that corporate and product brands are aligned with each other (this is a very significant comment relative to recommendations that will be made later in this thesis). Corporate and product brand alignment is not referred to in Schultz and Kitchen's 2000a model.

Kliatchko (2008) suggests that the implementation of IMC involves just two levels of an organisation; the corporate level and the operational level. He suggests that each level focuses on separate, key, strategic and managerial issues:

At the corporate level, senior management takes on a holistic view of business, defines what business it is in (what it will and will not do), determines its mission (corporate goals and objectives), advocates a strong customer orientation in the management of its business, and drives brand-building strategies. Senior managers at this level are at the helm of safeguarding the identity, image and reputation of the

organisation. Senior management takes full responsibility for the task of integration, including integrating all the functional units within the firm, to deliver and satisfy consumer needs. It instils in everyone within the firm a culture of marketing - that marketing is everyone's job... Senior management views marketing communications as a strategic management tool, an investment that generates business results in the long term (Kliatchko, 2008, p. 143).

At the operational level Kliatchko (2008) identifies the following strategic areas of management:

IMC managers at this level focus on the planning, management, implementation and measurement of the IMC planning process that begins with a deep understanding of needs, desires and behavioural patterns of multiple markets (both internal and external audiences) that the firm interacts with in the marketplace. Managers at this level define, analyse and develop specific strategic IMC programmes that will allow the firm to compete successfully in its chosen business. Key to their success is the ability to manage long-term profitable customer relationships. At the operational level, IMC managers are also responsible for coordinating with various communication agencies, such as advertising agencies, media agencies and other suppliers, for the effective implementation of IMC programmes (Kliatchko, 2008, p. 144).

In concluding this section it is clear that there is a diversity of opinion concerning the levels and dimensions of integration when an organisation seeks to integrate its brand messages. While Duncan and Moriarty (1998) suggest that marketing communications can be broken into three levels or components, Schultz and Kitchen (2000a), and Burgmann (2007), suggest that IMC can be divided into four levels or stages of development. Kliatchko (2008) discusses just two levels. Each analysis is helpful in that each offers a significantly different perspective on the process. However, all agree that the implementation of IMC needs consideration "from the highest corporate strategic level down to the day-to-day implementation of individual tactical activity" (Pickton & Hartley, 1998, p. 450). That is, both strategic (or vertical) integration, and horizontal (or tactical) integration, are critically important aspects of the IMC process and each aspect poses its own individual challenge to that collective process.

It is this researcher's view that Duncan and Moriarty's 1998 analysis, in particular, provides a constructive way forward in an attempt to define IMC as a concept that is distinct from both 'integrated marketing' and 'integrated corporate communications'. This thesis contends that the IMC concept and nomenclature belongs primarily in the domain of 'marketing communications', as opposed to what has been described by Duncan and Moriarty (1998) above as 'integrated marketing' or 'integrated corporate communications'.

However, this does not mean that IMC should not be strategically integrated with the corporate communications that emanate from the senior executive suite - part of the organisation's business strategy - or with the integrated marketing that emanates out of the Marketing Department. But it does mean that the IMC concept, in this researcher's opinion, is best confined to marketing communications - as opposed to including integrated marketing and/or integrated corporate communications under the IMC umbrella concept. Perhaps a more satisfactory all-embracing concept for all three levels of integration should be 'integrated brand communications' (IBC) (Burgmann, 2007; Duncan & Mulhern, 2004; Luxton, 2008) - allowing the concepts IMC, Integrated Marketing and Integrated Corporate Communications to relate exclusively to their organisational level of relevance.

This research agrees that the term IMC is conceptually much more than a mere tactical exercise that simply bundles promotional elements together to create a one-way, one-voice phenomenon (Level 1 in Schultz and Kitchen's 2000a four stage model). However, this research contends that the cornerstone of IMC must be a fundamental commitment to the primacy and consistency of the brand in all marketing communications undertaken by agencies for their clients. This includes understanding, in-depth, the anatomy of the corporate umbrella brand, as well as an in-depth understanding of the anatomy of each sub-brand included in an organisation's house of brands.

In summary, it is evident that the term IMC has changed its meaning as the discipline has evolved over the past three decades. There is a sense in which the term has become somewhat generic as it has been expanded to include multiple levels of corporate endeavour. It is the considered view of this researcher that the IMC concept should be confined, by definition, to the practice of planned marketing communications (planned, media touch-point level communication) - while also acknowledging the need for the integration of corporate brand values into every level of every strategic business unit in an organisation. This proposition does not mean a return to one-way, inside-out communication but it does mean that it is less confusing and more helpful if different terms are used when discussing integration at the marketing or corporate levels. IMC needs to be a brand-consistent, two-way conversation, where brands engage with their stakeholders in a constructive relationship of mutual respect. In this regard, largely as a result of the advent of social media, it is now common for brands to evolve in a co-created form - the result of dialogue between organisations and their stakeholders

(Gambetti & Schultz, 2015; Muscroft & Needham, 2011; Prahalad & Ramaswamy, 2002).

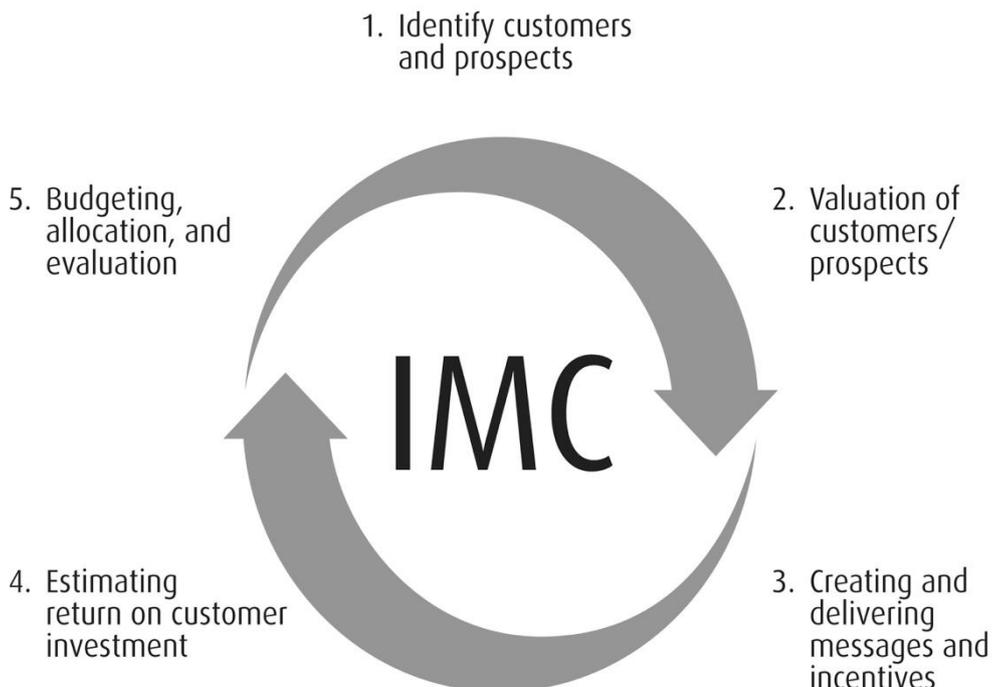
2.3.6 The Implementation of IMC: Strategic Planning Models

Belch, Belch, Kerr and Powell (2012) suggest that there are two key IMC planning models favoured by academics and practitioners today. The first is proposed by Schultz and Schultz (2004) who offer a five-step IMC planning approach and the second is presented by Duncan (2005), who offers a six-step planning approach. This section will provide a brief summary and analysis of the two models.

The five-step IMC planning process proposed by Schultz and Schultz (2004) (refer to Figure 2.6) consists of five separate but interrelated activities that involve some of the same components of other standard planning models but is based on core IMC principles such as outside-in planning where the process starts outside of the company and builds backwards towards the brand.

The process is a series of interconnected, customer -focused, managerial steps that lead to and through the development and implementation of a totally integrated marketing communication program (Schultz & Schultz, 2004, p. 68).

Figure 2.6: The Five-Step IMC Planning Process



Source: Schultz & Schultz (2004) p. 69

Step 1: Identify customers and prospects. The overriding goal during Step 1 is to gain meaningful insights into the needs and desires of the target audience that the organisation wants to engage.

Step 2: Valuation of customers and prospects. This task involves identifying and estimating the financial value of customers and prospects and the income flows that generate from each behavioural group in order to make intelligent marketing communication investments.

Step 3: Creating and delivering messages and incentives. Messages and incentives appropriate to each target audience are created and delivered. Customer insights are captured and used by agency planners to facilitate this process. All messages and incentives must be capable of measurement.

Step 4: Estimating return on customer investment. Because all IMC messages and incentives must be capable of measurement it is possible to calculate a return on investment per customer and also to identify which groups are most profitable.

Step 5: Budgeting, allocation, and evaluation. The final step in the process involves implementing the IMC program in the marketplace, evaluating its success, then developing a reinvestment strategy. The communication approaches that were successful should be repeated and those that were not should be revised.

Duncan (2005) offers an alternative IMC planning model, based on what he calls 'zero-based communications planning'. He defines this process as follows:

Zero based planning determines objectives and strategies based on current brand and marketplace conditions, which are considered the zero point (Duncan, 2005, p. 171).

In other words, each IMC plan should be based on an assessment of what needs to be done now, as opposed to what was done in previous years. Planning should commence with a clean sheet each year. Duncan's 2005 six-step IMC planning process (refer to Figure 2.7) is as follows:

Figure 2.7: Zero-Based Campaign Planning

STEP	DESCRIPTION
1. Identify target audiences	Analyse the various customer and prospect segments, and determine which to target and to what extent.
2. Analyse SWOTs	Summarise internal (strengths, weaknesses) and external (opportunities, threats) brand-related conditions, determine the success of the MC functions and media used in preceding year.
3. Determine MC objectives	Decide what marketing communication programs should accomplish.
4. Develop strategies and tactics	Determine which MC functions should be used and to what extent. Choose brand messages and means of delivery. Support each strategy with a rationale. Decide when each MC program will begin and end.
5. Determine the budget	Decide what the overall MC budget will be and then how money will be divided among the selected MC functions.
6. Evaluate effectiveness	Conduct ongoing MC tests in an effort to find more effective ways to do IMC. Monitor and evaluate all the IMC efforts to determine effectiveness and accountability.
Note: (MC refers to marketing communication).	

Source: Duncan (2005) p. 172

Step 1: Identify target audiences. Specific brand messages are targeted at different groups.

Step 2: Analyse SWOTs. Once identified the SWOTs need to be prioritised and then used to set new marketing communication objectives.

Step 3: Determine marketing communication objectives. Marketing communication objectives should be measurable so that marketers can evaluate how effective their marketing communications have been.

Step 4: Develop strategies and tactics. According to Duncan (2005):

Strategies are ideas about how to accomplish objectives; tactics are specific actions to be taken to execute a strategy. (Tactics) are the executional details that bring a strategic idea to life (p. 184).

Step 5: Determine the budget. Decide how it will be divided amongst the selected marketing communication functions; for example, television, print, or radio advertisements, brochures, direct mail pieces, planned brand messages delivered via digital media, sponsored events, trade advertisements, etc.

Step 6: Evaluate effectiveness. The effectiveness of a campaign is evaluated against the campaign objectives.

The vast majority of brand messages have never been, and never will be, formally measured or evaluated. Most decisions about whether to use a particular brand message are based on the judgement of a marketing manager (or some other client or agency executive) because there is not enough at risk to justify spending money to evaluate every single message (Duncan, 2005, p. 701).

Associated with Duncan's 2005 six-step IMC planning process is Duncan and Moriarty's 1997 twenty question mini-audit - whereby an organisation can quickly test its level of integration and the efficacy of its customer relationship-building practices. The audit monitors key IMC processes and evaluates them to see whether they are being managed effectively. The audit has been received positively by both academics and practitioners (Belch et al. 2012; Zabkar, Vanita & Mumel, 2013).

The IMC planning models developed by Schultz and Schultz (2004) and Duncan (2005) both have components found in standard planning models and both have emphases that differentiate them from these other planning models. Both models are constructed from an IMC perspective and are designed for use in an IMC context.

The planning steps in these models most relevant to this research are Step 3 in Schultz and Schultz's 2004 model and Step 4 in Duncan's 2005 model. Both of these steps relate to the central theme of this thesis - the implementation of IMC.

In Step 3 Schultz and Schultz (2004) discuss how customers come into contact with the brand. The first thing that the marketer must do is to identify these touch points. They must then determine which of these points of contact offer the greatest opportunity to engage the consumer in a relevant and positive manner at a time when they are most receptive.

If there is nothing stored in the consumer's brain relating to a particular brand, product or service it is difficult to add new concepts, for there is nothing in the brain to connect with. However, if messages are relevant to the consumer's current felt needs, wants and desires

they will add this information to their brand networks. Where marketing communication messages are inconsistent with the customer's current brand experience then those marketing communications are likely to be rejected or ignored by the customer. Similarly, where brand messages are radically different when received through two different marketing communications delivery systems they will be ignored or rejected by the customer. Schultz and Schultz (2004) conclude that:

This is a simple but very powerful argument for integration of marketing communication at all levels and by all groups that are attempting to communicate with customers and prospects (p. 168).

The need for consistent messaging in marketing communications must therefore be afforded the highest priority by marketers; whether they be planned or unplanned brand messages.

When discussing the creation of messages and incentives Schultz and Schultz (2004) suggest that the process starts with the identification of a customer insight; the strongest motivational force in a customer's mind, where there is a perfect connection between what the customer or prospect wants to acquire and what the marketer wants to deliver. Once the customer insight has been identified it then needs to be applied in the creation of the brand messaging strategy. Where possible the strategy should be customised to each individual respondent (contemporary digital technologies offer this possibility).

An important element in Schultz and Schultz's (2004) communication strategy development process relates to branding. The question is asked: "What should the personality of the brand, company or product be? What unique personality will help further define the product or service and discreetly differentiate it from the competitive frame?" (p. 181). They affirm that the consistent communication of the tone and personality of the brand is exceedingly important in the communication process in that it gives life to the relationship with the consumer, it differentiates the brand from its competition and it gives the consumer a feeling of familiarity and kinship with the brand.

But Schultz and Schultz (2004) give only an implied reference to the importance of the brand identity concept in this process. They talk about the role of brand personality and brand positioning in the communication process and later they discuss brands as trademarks, as legal assets, as relationship-building assets, and as financial assets - but the

role of brand identity as a blueprint for the brand, as the provider of the integrating DNA of a brand, is not discussed.

Step 4 in Duncan's (2005) zero-based communications planning model discusses developing IMC communication strategies and tactics. A fundamental component of a creative message strategy is what advertising agencies call a big idea. Duncan (2005) observes:

The big idea synthesises the purposes of the strategy; joins the product benefit with consumer desire in a fresh, involving way; brings the subject to life; and makes the reader or the audience stop, look, and listen. In IMC, a big idea translates the strategy into a catchy umbrella theme that unites all the various brand messages and contributes consistency to the various brand messages (Duncan, 2005, p. 291).

A big idea is a creative concept that brings a selling strategy to life. It is a major product of most creative advertising agencies.

Although Duncan (2005) employs the brand identity concept in his discussion, he restricts his definition of the concept to the description of just the graphic dimensions of a corporate identity program (just one of four possible expressions of the brand identity concept - discussed below).

However Duncan (2005) argues strongly in his text for strategic consistency in all of an organisation's communications with all of its stakeholders. By this he means that there may be differences in marketing communication messages, depending on who the audience is, but certain core elements should be integrated into every message. These core elements should include the brand name and logo, the brand's personality, the brand's positioning and brand identification cues. Strategic consistency involves a consistent brand image and position. Strategic consistency helps to build long-lasting brand relationships by increasing trust, message synergy, and eliminating contradictory messages. Duncan (2005) argues that the foundation for all corporate communication is an organisation's corporate culture, its corporate mission, and its core values. These elements must be integrated into all communications if strategic consistency is to be effective. This theme will also be discussed further below.

This section has discussed and evaluated what are reputed to be the two leading IMC planning models favoured by academics and practitioners today. The two models have been examined to identify what they have to say about IMC at a planned level. The

discussion concludes with the observation that Schultz and Schultz (2004) give implied reference to the importance of the brand identity concept in their model, while Duncan (2005) alludes to the brand identity concept in his model but his definition of brand identity in his text is restricted to the graphic dimensions of a corporate identity program only. However, it is clear from Duncan's discussion of 'strategic consistency' relating to 'message execution' that core values, corporate mission and corporate culture are fundamentally important integrating elements in an organisation's brand communications.

2.3.7 Corporate Brand and Product Brand

In this section the similarities and differences between corporate brands and product brands are reviewed. In particular the discussion seeks to review what are the similarities and differences between the corporate brand identity construct and the product brand identity construct and how an understanding of the former might enlighten our understanding of the latter.

There are many different kinds of brands; business to business brands, consumer brands, corporate brands - and many others. Classifying brands can be a formidable challenge. Brands have expanded way beyond the business world. The brands of fast moving consumer goods dominate our everyday experience - straightforward products with no service element. But more and more brands today are service-dominated and many well-known consumer brands such as McDonald's or Starbucks have a mix of product and service elements (Olins, 2007).

Fundamentally branding is about creating and sustaining trust and delivering on promises.

The best and most successful brands are completely coherent. Every aspect of what they are and what they do reinforces everything else. Wherever you touch a coherent brand, as a customer, a supplier, a shareholder, an employee, it feels the same. The best brands have a consistency which is built up and sustained by people inside the organisation who are immersed in what the brand stands for (Olins, 2007, p. 175).

A brand-product matrix (or grid) is useful when seeking to graphically represent the range of products and brands sold by an organisation. A brand hierarchy within that matrix can illustrate an organisation's branding strategy by identifying the number and nature of different brands across the organisation's product offering. Keller (2008)

suggests that the simplest representation of a brand hierarchy, from top to bottom (using General Motors as an example), might be as follows:

- 1) Corporate or company brand (General Motors)
- 2) Family brand (Buick)
- 3) Individual brand (Park Avenue)
- 4) Modifier (designating item or model) (Ultra)

The corporate or company brand is always at the highest level of this hierarchy. For some firms such as General Electric and Hewlett-Packard the corporate brand is virtually the only brand; for others the corporate brand is virtually invisible for marketing purposes (e.g. Procter & Gamble). In other cases the corporate brand is used as a subtle endorsement of product brands (e.g. Nestle). According to Abratt and Kleyn (2012) and Kitchen, Tourky, Dean and Shaalan (2013) there is little agreement in the literature as to what constitutes a corporate brand and this is considered problematic in that the construct is often used in the literature interchangeably with the corporate identity construct.

Balmer and Gray (2003) observe that corporate brands are different to product brands in terms of their scope and management and have a multi-stakeholder rather than a customer orientation. As mentioned above, Schultz and Kitchen (2000a) consider the corporate brand to be “the central core or fulcrum that gives an overall sense of meaning, identity, strategy, and dynamic thrust to the basketful of individual brands within its portfolio” (p. 56). Kitchen et al. (2013) cite Abratt and Kleyn’s (2012) definition of corporate brand as:

The expressions and images of an organisation’s identity...The process of corporate expression spans an organisation’s corporate identity and its corporate brand building activities. It includes the development of visual identity, the brand promise and brand personality as well is the communication thereof (Abratt & Kleyn, 2012, p. 1053).

All established corporate brands have core values which provide a basis for continuity in the process of managing, developing and protecting those brands as strategic organisational assets. Urde (2009) argues that core values are:

Mindsets rooted within an organisation and the essential perceptions held by customers and non-customer stakeholders defining the identity of a brand. These values influence both the internal and external sides of the brand. The key question answered by core values is ‘what the corporate brand stands for’ (p. 621).

The core values of an organisation must represent the same values expected and appreciated by their customers over time. Where these values are declared and promised

but not delivered customer relationships are undermined and the organisation's reputation debased. This in turn creates severe problems for the organisation's leadership and for the credibility and legitimacy of the corporate brand. Corporate branding must emphasise an organisation's core values - the guiding principles and the unifying common thread of an organisation (Kitchen et al. 2013).

A corporate brand is the projection of the core values of a corporation enabling it to build strong relationships with all stakeholders. A corporate brand alerts stakeholders to a set of principles that the organisation stands for, to the desired behaviour expected from staff, to a set of values that bond the organisation. By focusing on these values external stakeholders and staff can effect a win-win partnership mentality (de Chernatony, 2010).

Corporate values are unique to each corporation. They are sometimes referred to as the 'brand essence'. They define the corporate brand's identity. For example the three core values of Volvo are 'quality, safety and environment' while the core values defining IKEA are 'common sense and simplicity'; 'dare to be different'; and 'working together'. The three original core values for IBM (identified in 1926), 'excellence, customer satisfaction and respect for the individual' were considered obsolete by 2003 in a radically changed business environment, and replaced by other longstanding values deemed to be more appropriate: 'innovation' for 'excellence'; 'dedication' for 'customer satisfaction' and 'trust' for 'respect for the individual' (Urde, 2009).

Balmer (2012) argues that the corporate brand is multifaceted by nature. He suggests that the quintessence of a corporate brand relates to the informal but powerful covenant or promise between the organisation behind the brand and its customers and other stakeholders. While stakeholders can ascribe their own meanings to the corporate brand there is much more flexibility in terms of the meanings that can be ascribed to product brands than can be accorded to corporate brands. Balmer (2012) contends that brand meanings assigned to product brands by an organisation are to a large extent contrived, whereas corporate brand values are innate. They must be authentic (reflecting the organisation's identity); believable (reflecting the organisation's culture); durable (sustainable); profitable (creating stakeholder and shareholder value); and responsible (reflecting ethical requisites expected by society).

Corporate brands and product brands are inextricably mixed. The image of the corporate organisation can often exert a strong influence on the brand image of a product. Because

the costs of creating and supporting individual brands has become increasingly prohibitive in recent years, there has been a significant move away from individual line branding towards corporate branding, with the corporate brand becoming a major discriminator in consumer choice (Pickton & Broderick, 2005).

In the last few decades there has been much written about the interaction between product brands and consumers with less written about the interaction between corporate brands and stakeholders (de Chernatony, 1999). Although corporate image has been researched since the 1950s (Bolger, 1959; Martineau, 1958) in marketing and management research the term corporate identity has been frequently used interchangeably with corporate image. As noted above (in regard to corporate brand and corporate identity), this ambiguity in construct definition and boundaries is problematic. However, more recently, as the literature has evolved, efforts have been made to distinguish between the interrelated constructs: corporate identity, corporate image, corporate brand and corporate reputation (Kitchen et al. 2013). Corporate brand has been discussed above; corporate identity will now be discussed.

Corporate brands develop out of corporate identities (Balmer, 2012). There is a growing literature on corporate identity (de Chernatony, 1999) but as yet no universally accepted definition (Kitchen et al. 2013). Corporate identity is defined by Abratt and Kleyn (2012) as “an organisation’s strategic choices and its expression thereof” (p. 1051). They observe that corporate identity is an area dominated by multiple categories, citing Balmer and Greyser’s (2003) identification of six separate corporate identity types (The AC3ID Test). Balmer (2012) has subsequently updated his model to include seven identity types that form a corporate brand constellation (The AC4ID Test):

- 1) (A) The Actual Corporate Identity: The distinctive attributes of the organisation, including business activities, purposes, corporate style and ethos, markets covered.
- 2) (C1) The Communicated Corporate Brand Identity: The messages emitted from the organisation. This encompasses outward-directed communication such as visual identification (logos), corporate advertising, and corporate public relations.
- 3) (C2) The Conceived Corporate Brand Identity: The images and reputations of the organisation held by customers and other stakeholder groups.
- 4) (C3) The Covenanted Corporate Brand Identity: The underlying promise that is associated with the corporate name and/or logo. However, owing to the power and strength of association towards a corporate brand on the part of customers, employees, and others (which sometimes has a religious-like fervour), the term covenant appears to be appropriate.

- 5) (C4) The Cultural Corporate Brand Identity: The collective feeling of employees in relation to the corporate brand. These beliefs are derived from the values, beliefs and assumptions relating to the corporate brand including its historical roots.
- 6) (I) The Ideal Corporate Brand Identity: The optimum strategic (future-oriented) positioning of the organisation in a given time frame. This is the established after organisational competencies, assets, the competition, and changes in the political, economic, ethical, social, and technological environment have been scrutinised.
- 7) (D) The Desired Corporate Brand Identity: The sought-after future positioning of the organisation that lives in the hearts and minds of corporate leaders: it is their vision for the organisation's identity in a given time frame. (This identity type is cognitive/aspirational in character whereas the Ideal identity is strategic in nature) (Balmer, 2012, pp. 1077-1080; Balmer, Stuart & Greyser, 2009, pp. 19-20).

Corporate identity is characterised as being complex, multifaceted, and multidimensional in nature. The aim of the AC4ID test framework is to meet the needs of senior managers and their advisers by providing a diagnostic tool for identifying identity misalignments. Each dimension can be regarded as a reality for a group or groups of corporate stakeholders. By scrutinising the corporate brand constellation corporate executives can reveal whether all corporate brand identities are meaningfully aligned with the covenanted corporate brand identity or not (Balmer, 2008; Balmer et al. 2009; Balmer, 2012).

However, Balmer's ACID test model has been criticised by Cornelissen, Christensen and Kinuthia (2012) as having been stretched too far as an umbrella construct in order to encompass a whole range of 'linguistic, cognitive and behavioural processes', to the point where it lacks specificity and validity. They suggest that Balmer's traditional alignment model is oversimplified and insufficiently operational, logically incoherent, and shaped by both ontological and epistemological difficulties and inconsistencies. They argue for a shift towards alternative, analytical, interpretive, constitutive models; models that are relational in nature (Cornelissen et al. 2012).

Olins (2007) contends that every organisation has a unique identity - the totality of the way it presents itself. Organisations carry out thousands of transactions every day and in all of these transactions the organisation presents itself in some way to the various groups of people with whom it deals. The totality of the way an organisation presents itself to these stakeholders is called its corporate identity. What different stakeholders perceive, as result of these interactions, is called its corporate image (its perceived identity). A corporate identity program enables that identity to be managed and projected to all its

audiences (both internal and external) and requires the leaders of an organisation to have a clear idea of the vision that drives that identity. According to Olins (2007) a corporate identity projects four fundamental ideas about an organisation: Who it is (the organisation's intrinsic character), what it does, how it does it, and where it wants to go. The fundamental idea behind an identity program is that in everything the organisation does, everything it owns, and everything it produces, it should project a clear idea of what it is and what its aims are (Olins, 2007).

Kitchen et al. (2013), responding to Cornelissen et al's. 2012 contention that researchers need to pay greater attention to issues of construct clarity, and with a view to constructing a definition that might be measurable in the empirical field, define corporate identity as a managerial rather than a consumer construct:

The presentation of an organisation to every stakeholder. It is what makes an organisation unique and it incorporates the organisation's communication, design, behaviour, culture, mission statement and organisation founder. It is thus intrinsically related to image (p. 265).

Kitchen et al. (2013) postulate that the corporate identity construct consists of the following dimensions: communication, corporate visual identity, behaviour, culture, mission statement and organisation founder. They suggest that for some of these dimensions there are sub-dimensions. For example, for communication there are the subdivisions of controlled and uncontrolled communication; addressing uncontrolled word-of-mouth communication from an internal corporate perspective is therefore an element of corporate identity management. Corporate visual identity includes the sub-dimensions of corporate visual identity system and the applications thereof; behaviour includes the sub-dimensions of management, employee and corporate behaviour; and culture includes the sub- dimension of corporate values. Corporate identity management includes addressing issues relating to all of these dimensions; seeking to apply and measure each dimension.

Kitchen et al. (2013) argue that:

Underpinning corporate branding is corporate identity... Demonstrably, corporate identity is more than graphic design, organisational symbol or brand mark. It is rather a set of attributes that denotes the ways in which an organisation conducts itself in its interface with external publics (p. 267).

These attributes encompass all of the dimensions discussed above. Corporate identity represents the foundation of the corporate brand and is the basis of the brand's unique differential advantage. It can be considered as the essence or core of the corporate brand. However, Kitchen et al. (2013) contend, not every business wants or needs a corporate brand but every business needs a corporate identity. Therefore corporate identity is a necessary concept while corporate brand is contingent on context. An additional concept, organisational identity, refers to what members within an organisation perceive, feel and think about their organisation (Abratt & Kleyn, 2012). Organisational identity answers the question of 'who are we?' whereas corporate identity answers the question 'what are we?' Kitchen et al. (2013) observe that both perspectives are complementary and, therefore, mutually reinforcing. They suggest that organisational identity is an integral part of corporate identity and is at the core of an organisation's corporate identity.

Corporate image, for the purpose of this thesis, is defined as:

The totality of a stakeholder's perceptions of the way an organisation presents itself, either deliberately (e.g. through planned PR activities) or accidentally (e.g. through comments made by staff or media comment) (Markwick & Fill, 1997, p. 398).

Corporate reputation is defined as "a stakeholder's overall evaluation of a company over time" (Abratt & Kleyn, 2012, p. 1050).

In summary, corporate brands differ from product brands in terms of their scope and management and have a multi-stakeholder rather than a customer orientation. A corporate brand gives meaning, identity and strategy to product brands within its portfolio. Corporate brands have core values which provide continuity in the process of managing, developing and protecting product brands. Corporate brands project the core values of a corporation - sometimes referred to as the brand essence - which define the corporate brand's identity. Corporate brands represent an informal but powerful promise between the organisation behind the brand and its customers and other stakeholders. Brand meanings assigned to corporate brands are less flexible than the meanings that can be ascribed to product brands because corporate brand values are innate. However corporate brands and product brands are inextricably mixed in that the image of the corporate organisation can often exert a strong influence on the brand image of a product. In addition, after building respect and trust with one brand in a corporation's brand portfolio consumers are more likely to accept promises concerning other brands in the portfolio. In product branding consumers generally assess a brand's values from advertising,

packaging, distribution and the users of the brand, with little interaction with corporate staff. In corporate communications, where stakeholders interact directly with staff, corporate branding enables staff to better understand the type of organisation they work for and the style of behaviour required. Staff are ambassadors for the corporate brand. They must understand the brand's vision and be totally committed to delivering it. In this respect organisational culture is a key contributor to brand success and it is the CEO who is responsible for the corporate brand's health, providing leadership that enables all employees to recognise the importance of the corporation's core values (de Chernatony, 2010).

There are two important parallels between the corporate brand identity construct and the product brand identity construct. Firstly, they both represent the way an organisation wants to present itself to its respective stakeholders. The way an organisation presents itself to its stakeholders is called its corporate brand identity (Abratt & Kleyn, 2012; Balmer & Greyser, 2003; Kitchen et al. 2013; Olins, 2007). The way a product brand presents itself to its customers is called its brand identity (Aaker, 1996; 2014, Aaker & Joachimsthaler, 2000; de Chernatony, 2010; Kapferer, 2008). Secondly, at the heart of a corporate brand identity are the core values of an organisation (Kitchen et al. 2013). In like manner, at the heart of a product brand are the core corporate values. As de Chernatony (2010) observes, product brands must embrace the central, non-negotiable values of the corporate brand. For example Nike differentiates itself through its brand values: authentic (being real in the eyes of athletes); inspirational (through any emotion and passion for sports); courage (conviction to stand by beliefs) and innovation (de Chernatony, 2010; Kapferer, 2008).

2.3.8 Brand Identity and Brand Image

The fundamental proposition of this thesis is that brands are the key to the implementation of integrated marketing communications; that the corporate brand is at the heart of everything an organisation seeks to do and a product brand is at the heart of every product related marketing and marketing communications strategy that an organisation seeks to undertake. The thesis contends that corporate brand identity is the key to strategic/vertical integration in an organisation while product brand identity is the key to the horizontal/tactical integration of an organisation's marketing communications. This thesis proposes, therefore, that brands must necessarily be the cornerstone of an

organisation's integrated marketing communications. A brand identity lies at the heart of creating and managing a brand and is at the heart of every brand strategy (Aaker, 2014).

To some extent stating this proposition is not new. Over 15 years ago Schultz (1998) wrote:

Over the past few months, we've had a revelation about integration - a revelation so simple that we've overlooked it all this time. A concept which really answers many of the 'hows, whys, in what ways, over what time periods, can we do it' about integration. In fact the answer has been right under our noses all the time. It's as simple as this. The brand is the only element in the organisation that provides value to all four of the organisation's stakeholder groups: the consumer or customer, the employee, the shareholder and management...In short, the brand is the integrating factor around which all marketing and communication should be built. It is the glue that keeps the organisation, its customers, and its stakeholders together. It is the unifying force in the marketplace... All forms of marketing and marketing communication must be integrated to build the brand and build value in the brand... In truth, integration should be fairly simple if looked at from the viewpoint of the brand... With this approach, there is a measurement and evaluation process to see what will do the most to enhance, build or maintain brand value and brand equity (Schultz, 1998, p. 8).

In this discussion Schultz(1998) argues that the brand is the very key to integrated marketing and integrated marketing communications. He argues that the brand is at the heart of what consumers want, need, and consider of value. It is the basis upon which customers and consumers have an ongoing relationship with an organisation. It is the hub around which all marketing effort and communication revolves (see also Schultz & Kitchen, 2000a; Kitchen & Schultz, 2003).

Ultimately brands are owned by consumers. Organisations create brand identities but consumers give brands imagery - a point argued by Schultz and Kitchen (2000a). They suggest that brand images can change over time as fashions and life cycles change, or as consumers change the ways in which they satisfy their needs (for example, the negative change in consumer attitudes towards the Levi Strauss brand in the 1990s). Schultz and Kitchen (2000a) observe that for many companies the brand is a twofold entity; the corporate umbrella brand and a portfolio of product or service brands - and increasingly, consumers want to know more about the company behind the product brand. 'What does it do? What values does it personify? What personalities are running a company?' Thus, Schultz and Kitchen (2000a) conclude - and this important statement bears repeating - that "the corporate brand is the central core or fulcrum that gives an overall sense of meaning, identity, strategy and dynamic thrust to the basketful of individual brands

within its portfolio” (p. 56). Individual brands, meanwhile, are “powerful corporate assets in their own right, providing exchanges that inculcate brand loyalty, provide brand equity, and immeasurably enhance and empower corporations that ostensibly own them” (p. 56). Consequently this situation creates a twofold communications scenario for executives: integrated communication at the corporate brand level, and integrated marketing communication at the individual product brand level (Kitchen & Schultz, 2003).

This view had also been postulated several years earlier by Schultz (2001):

The corporate brand is the hub of most businesses... For the most part product brands rely on the corporate brand as the source for the trust, respect, reliability, and all the other qualities the product brands represent. The customer is in the centre of the branding process. The corporate brand, in addition to being the core of the branding process from which product brands often generate their value, also provides the necessary integration elements that bring and hold the organisation together. This includes everyone from employees to suppliers and vendors to, ultimately, shareholders and owners. Unless and until there is a clear and consistent view of what the corporate brand represents, product brands may go off in different directions, often confusing customers and prospects in the process... Managing the value of a corporate brand must be ongoing and retentive. It commonly must represent the total customer experience (Schultz, 2001, pp. 6-7).

Although these views are no longer new, they seem to have been overlooked or ignored in more recent discussions of IMC (for example, Kerr & Patti, 2013) - a situation that will be discussed further later in this chapter.

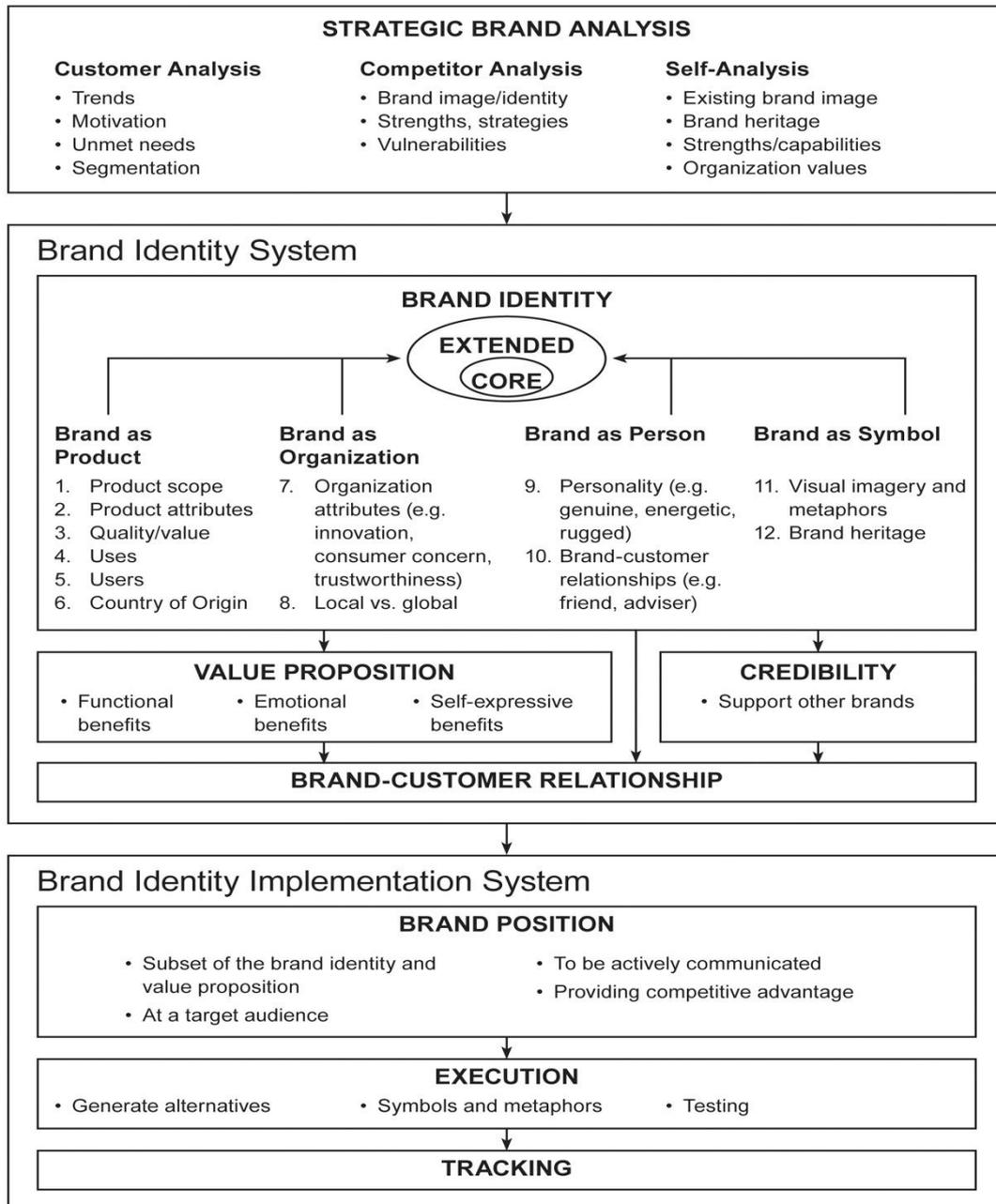
The discussion now examines the product brand identity concept. One of the leading proponents of this concept is David Aaker; his conceptualisation of the brand identity construct has gained significant academic support (Ghodeswar, 2008; Keller, 2008; Madhavaram et al, 2005; Nandan, 2005).

According to Aaker (1996) the brand identity statement is an expression of the unique attributes that define a brand. Aaker (1996) describes a brand identity system as the frame of reference customers might use when they recall the brand, process information about it, and evaluate it. Just as a person’s identity provides direction, purpose and meaning for that person so a brand’s identity provides direction, purpose and meaning for the brand. Aaker argues that a person or a brand’s core identity can be understood by answering the questions: What are my most important values? What do I stand for? How do I want people to perceive me? What personality traits do I want to project? What are the important relationships in my life? He defines brand identity as follows:

Brand identity is a unique set of brand associations that the brand strategist aspires to create or maintain. These associations represent what the brand stands for and imply a promise to customers from the organisation members (p. 68).

Figure 2.8 shows Aaker’s Brand Identity Planning model.

Figure 2.8: Aaker’s Brand Identity Planning Model



Source: Aaker (1996) p. 79

In Figure 2.8 Aaker (1996) postulates that brand identity consists of 12 dimensions organised around four perspectives. The four perspectives include: (a) Brand as Product,

(b) Brand as Organisation, (c) Brand as Person, and (d) Brand as Symbol. He believes that not every brand identity needs to employ all four of these perspectives or all twelve dimensions - just the perspectives and dimensions that are helpful in articulating what the brand should stand for in the consumer's mind (Aaker & Joachimsthaler, 2000).

Aaker (1996) further postulates that the brand identity structure includes a core and an extended identity. He suggests that the core identity represents the central, timeless essence of the brand and is likely to remain constant when the brand develops new products or travels to new markets. It should be resistant to change. The core identity includes the fundamental beliefs and values that drive the brand; it includes the core competencies of the organisation behind the brand; it includes what the organisation behind the brand stands for. It is the soul of the brand. The core identity includes elements that make the brand both unique and valuable; it gives the brand its value and its credibility. Sometimes a slogan can capture part of this core brand identity. e.g. "Avis. We're number two; we try harder" (a commitment to delivering the best customer service).

The extended brand identity includes elements that provide texture and completeness to what the brand stands for. For example, important elements of a brand's marketing program such as the brand's personality, the range of its products, the number of sub-brands, its logo, its slogan, the retail experience it provides, its reputation as a good corporate citizen, its loyal users, and the friendliness and helpfulness of its employees. These elements typically provide a brand's extended brand identity.

Aaker (1996) suggests that a brand identity needs to provide a value proposition to the customer. He defines a value proposition as follows:

A brand's value proposition is a statement of the functional, emotional, and self-expressive benefits delivered by the brand that provide value to the customer. An effective value proposition should lead to a brand-customer relationship and drive purchase decisions (p. 95).

Brand identity not only represents a value proposition to the customer but it can also provide credibility as an endorser of a sub-brand. The corporate brand can be used to endorse a product brand as part of a dual brand strategy. e.g. Nike Air Jordan; Honda Jazz.

Aaker (1996) argues that brand-customer relationships need to be managed. Brand behaviour can directly affect the brand-customer relationship. Just as a person's behaviour will influence how others perceive his or her personality so a brand's actions will affect consumer perceptions of its personality. For example, a brand-customer relationship of dependency can be damaged by an out-of-stock situation. Fournier's (1994) identification of seven dimensions of brand relationship quality are cited as a helpful way to measure the strength of brand relationships. They are as follows:

- 1) Behavioural interdependence ("This brand plays an important role in my life")
- 2) Personal commitment ("I feel very loyal to this brand")
- 3) Love and passion ("No other brand can quite take the place of this brand")
- 4) Nostalgic connection ("This brand reminds me of things I've done or places of been")
- 5) Self-concept connection ("This brand reminds me of who I am")
- 6) Intimacy ("I know a lot about this brand")
- 7) Partner quality ("I know this brand really appreciates me")

Finally, a three-step brand identity implementation system is proposed. The first step is a brand position statement, specifying what part of the identity is to be actively communicated. This is the cornerstone of the communications programme; the brand's competitive advantage - which is actively communicated to the target audience. The consistent execution of a brand's positioning over a period of time can lead to the ownership of that position. Competitors are pre-empted from that positioning and must pick another, which may be less effective. The second implementation step involves an execution strategy. He notes there are significant cost efficiencies to be gained from a consistent brand positioning strategy, supported by a strong identity symbol. Aaker's third step in the brand identity implementation process is to track brand equity over time. This includes tracking brand awareness, brand loyalty and other brand associations. It includes evaluating whether specific communication objectives have been met and observing the ongoing correlation of brand image against brand identity.

According to Aaker (1996) marketers should identify different brand elements and patterns that will clearly enrich and differentiate their brand's identity - that will clearly articulate what the brand should stand for in the consumer's mind. He further suggests that the more detailed the brand identity statement is the better should be the

implementation decisions when brand communications are created. These brand identity elements provide a holistic blueprint for the creation of a brand's image.

Aaker (1996) postulates that brand identity is "How strategists want the brand to be perceived" (p. 68) and brand image is "How the brand is perceived by customers and other stakeholders" (p. 69). He suggests that brand identity is active and looks to the future while brand image is passive and looks to the past. These conceptual distinctions are fundamentally important to this study. Brand identity and brand image are often used as synonyms (Belch, Belch, Kerr & Powell, 2009, 2014; Upshaw, 1995). However, there is a robust academic tradition that concurs with Aaker's definitions of these concepts and this study stands in that tradition (Aaker, 1996, 2014; Aaker & Joachimsthaler, 2000; de Chernatony, 1999, 2010; Duncan, 2005; Ghodeswar, 2008; Kapferer, 1986, 2008; Keller, 2008; Madhavaram et al. 2005; Nandan, 2005; Schultz & Schultz, 2004).

Another leading proponent of the brand identity construct is Jean-Noel Kapferer. In his 2008 text Kapferer observes that while there is an abundance of brand graphic identity manuals (books of standards and visual identity guides), explicit definitions of brand identity *per se* are still very rare. In terms of brand management, he suggests, brand identity precedes brand image. In marketing communications, brand identity is on the sender's side while brand image is on the receiver's side. Brand identity "specifies the brand's meaning, aim and self-image"; brand image is:

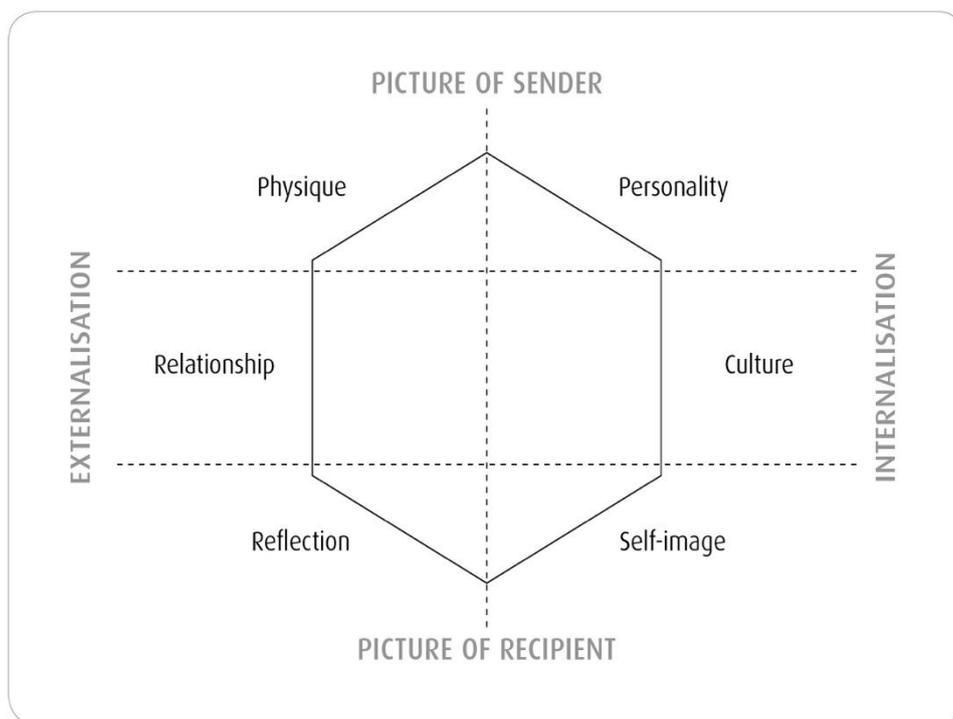
The way that stakeholders perceive a product, a brand, a politician, a company or a country... An image is a synthesis made by the public of all the various brand messages received by them...An image results from decoding a message, extracting meaning, interpreting signs (Kapferer, 2008, pp. 175-176).

These views are virtually identical to those of Aaker (1996, 2014). Kapferer (2008) notes that a brand's positioning is a key concept in its management and is based on the single principle of comparison with its competitors. Positioning is a necessary concept in that it emphasises the distinctive characteristics that make a product or service different from its competitors and more appealing to the public - but it does not reveal all of a brand's richness of meaning or its full potential. Without a brand identity framework positioning (on its own) allows marketing communication to be dictated by creative whims or current fads. It takes a brand identity to ensure overall brand coherence and to monitor the creative expression of a brand. Kapferer (2008) argues that the two tools are necessary to manage a brand; one defines the brand's identity while the other specifies the brand's

competitive proposition (or positioning) in any given market at any given time. He also notes that many companies and advertising agencies use the phrase ‘brand essence’. Kapferer (2008) suggests that an analysis of this practice reveals that it stems from a desire to summarise in a few words the identity and/or positioning of a brand; a statement of the key value that a brand stands for (for example: Amex - ‘sign of personal success’; Nivea - ‘pure love and care’). It therefore has managerial utility and should be written in the middle of a brand identity prism or on the top of a brand pyramid (Jones, 2000).

Kapferer (2008) postulates that brand identity has six facets and can be represented by a hexagonal prism (refer to Figure 2.9).

Figure 2.9: Kapferer’s Brand Identity Prism



Source: Kapferer (2008) p. 183

Kapferer’s prism moves from visualizing the brand as sender to interpreting what the brand means to the receiver. Three facets represent ‘internal’ aspects relating to the brand (personality, culture, and self-image) while three additional facets represent ‘external’ aspects relating to the brand (physique, relationship, and reflection). Thus, brands have external physical specificities and qualities developed by the marketer: What does it do? What does it look like? Physique relates to the tactile features of the brand that are recognised by our senses (for example, Toblerone’s pyramid shape). Similarly,

personality is the way in which the marketer wants a brand to speak of its products or services, showing what kind of person it would be if it was human. Personality is the set of human characteristics that can be associated with a brand.

Physique and personality are closely linked to both culture and relationships. Culture is the set of internalized values feeding a brand's inspiration; the source of a brand's aspirational power; the basic principles governing a brand as it expresses itself outwardly through its products and communication. Culture is at the core of a brand. It links a brand to the corporate organisation and differentiates brands on the basis of their fundamental ideals and sets of values. On the other hand relationships represent the external link between the brand and its customers. A brand is a relationship; brands thrive through the relationships they form with their customers. This is particularly true of brands in the service sector and also of retail brands. Relationships consumers have with brands can vary from casual to committed.

Finally, reflection (external) and self-image (internal) are two facets of the brand representing symbolic statements by the recipient - firstly to others - and secondly to themselves. Reflection suggests that a brand provides a basis for a customer to reflect something about themselves through owning the brand; that consumers use brands to build their own identity (for example, a Lexus car owner is making a statement about his or her success). Self-image proposes that a brand enables users to make a private statement back to themselves. This is an internal reflection (for example, after a difficult day at work a secretary sips her favourite brand of tea while reflecting upon the day).

Kapferer (2008) suggests that these six facets define the identity and the boundaries of a brand. All facets are interrelated and form a well-structured entity. In a coherent brand each of these dimensions support each other. The brand identity prism is built on the fundamental concept that brands can only exist if they communicate. There is a sender and a recipient. Both the physique and personality facets help to define the sender while the reflection and self-image facets help to define the recipient. The relationship and culture facets bridge the gap between the sender and the recipient. The facets to the left of the vertical division (refer to Figure 2.9) - physique, relationship and reflection - are the social facets, giving the brand outward expression; the facets to the right of the vertical division - personality, culture and self-image - are internalised within the brand itself. They represent the essence of the brand.

de Chernatony (2010) commends Kapferer's brand identity prism. He writes:

Not only does this tool help managers assess the competitive differentiation of brands, but it also provides an evaluation of the coherence of the brand. For an integrated brand, each of the six identity components should reinforce each other (p. 247).

There are several common threads in Aaker's (1996) Brand Identity Planning Model and Kapferer's (2008) Brand Identity Prism:

Both suggest that a brand represents a vision. At the core of its identity is a vision that embodies the essence of the brand. It is what the brand stands for; the key beliefs of the brand and its core values. It is the hub of the wheel that drives all of the key identity elements; that drives the creation of products and services under that name. It is at the heart of the brand's culture and its heritage. Secondly, both agree that a brand begins with a product. The product is the first source of brand identity. A brand reveals its plans and its uniqueness through the products or services it chooses to endorse. Products have attributes that can provide functional benefits at different levels of quality and value. Next, both agree that a brand is part of a corporate organisation with a corporate culture and a set of values that feed the brand's inspiration. This includes the brand's heritage.

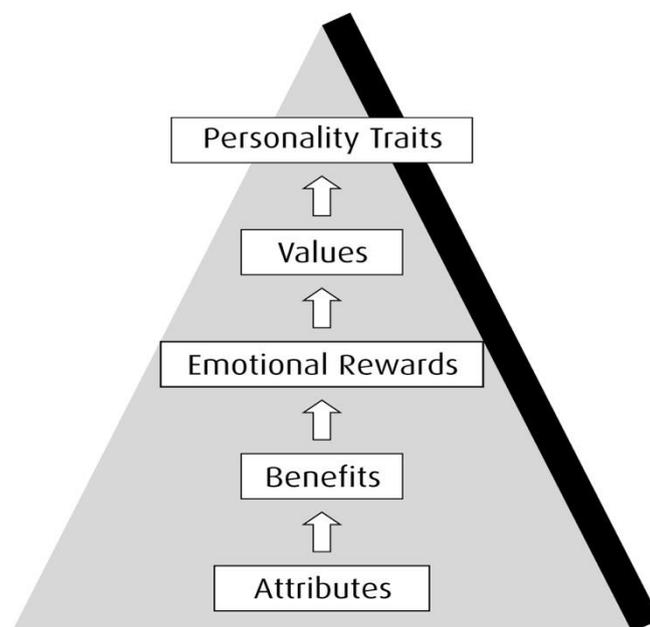
Both Aaker and Kapferer contend that a brand has a personality. The kind of person it would be if it were human. A brand's personality can make it interesting and memorable and can form the basis of a brand-customer relationship. Both agree that a brand is a symbol that can connect with customers on an emotional level and become part of their identity and self-image. Brands can reflect an image that a buyer or user wishes to project. Both Aaker and Kapferer suggest that a brand must be positioned competitively to demonstrate an advantage over its competitors. Positioning emphasises the distinctive characteristics that make a brand different from its competitors and more appealing to the public. Finally, they both agree that a brand is represented by unique visual symbols and imagery, logos and livery, that distinguish and differentiate it from its competitors.

Aaker's (1996) and Kapferer's (2008) conceptualizations of brand identity (summarised above) benchmark this research.

A quick venture into 'Google Images' will demonstrate that the brand identity concept has been translated by practitioners into myriad forms of 'brand onions', 'brand wheels' and 'brand pyramids'. de Chernatony (2010) observes that the aims of a brand pyramid "are to internally communicate the core characteristics of the brand and to reflect the

critical components of the brand that are important to consumers” (p. 260). de Chernatony’s own variation of the brand pyramid (refer to Figure 2.10) depicts the core essence of a brand as a pyramid. In his model a brand’s most important ‘attributes’ are included at the base of the pyramid (for example, a market-leading inflight entertainment system includes electronic games that can be played on board by passengers with other passengers). Each of these attributes are then linked (as a ladder) in the pyramid to their key functional ‘benefit’ (for example, entertainment during the flight), which in turn leads to the ‘emotional reward’ of fun. The emotional reward of fun can then lead to the ‘value’ of relaxation - a value welcomed by passengers - which might persuade them to travel with the airline again, rather than with a competitor. At the top of the pyramid is the brand ‘personality’, reflecting the traits of the brand and embodying the promise of the brand. For example (in the airline case), ‘ensuring travellers feel alert on arrival’. By examining the personality traits of the brand a suitable celebrity (for example, a film star, a pop star, or an athlete) can be engaged to represent the brand and to act as a metaphor for the brand; to endorse the values that they both have in common (de Chernatony, 2010).

Figure 2.10: de Chernatony’s Brand Essence Pyramid



Source: de Chernatony (2010) p. 259

de Chernatony’s elements of brand essence depicted in Figure 2.10 are in harmony with and resonate with the brand identity elements depicted by Aaker (1996) and Kapferer

(2008). de Chernatony (2010) suggests that although there may be differing views concerning the meaning of some of these basic brand concepts this should not be problematic as it offers a variety of alternative ways for an organisation's brand team to engage in the brand building process.

In concluding this section there is a need to briefly discuss the related concept of brand image. Gardner and Levy (1955) propose that brands have an overall character or personality (a brand image) that may be more important to the consumer than the mere technical facts about the product. Keller (1993) defines brand image as: "Perceptions about a brand as reflected by the brand associations held in consumer memory" (p. 3). According to Keller (1993) the favourability, strength and uniqueness of these brand associations determine a consumer's response to a brand. These brand associations provide the meaning of the brand for consumers. Keller posits that brand image is one of two defining components (along with brand awareness) in the creation of brand knowledge - the determining factor in the creation of customer-based brand equity (CBBE). For Keller, brand image is strategically antecedent to brand equity (Na, Marshall, & Keller, 1999). Implicit in the above discussion is that brand image is a consumer-constructed notion of the brand: "Consumers ascribe a persona or an image to the brand based on subjective perceptions of a set of associations that they have about the brand" (Nandan, 2005, p. 267).

By way of summarising this section, this thesis is in accord with Schultz and Schultz (2004) who define brand identity and brand image as follows:

Brand identity reflects the view of the marketer or brand owner. That is, identity is what the owner or manager believes or intends that the brand should represent to customers, consumers, prospects, and other relevant stakeholders. Brand image, on the other hand, is what customers, prospects, users, and the like believe or perceive the brand to be or what it represents to them at a given point in time (Schultz & Schultz, 2004, p. 307).

The discussion now turns to the role of brand identity in regard to the implementation of IMC.

2.3.9 Brand Identity and IMC

The concept of brand identity, like that of IMC, has suffered as a result of being assigned multiple definitions. It is frequently used as a synonym for brand image (Belch et al. 2009, 2014; Upshaw, 1995). As a result brand identity is often presented as the dependent

variable with IMC as the independent variable, rather than - as assumed in this thesis - brand identity is the independent variable and IMC is the dependent variable. In other words, brand identity is antecedent to IMC (Luxton, 2008; Schultz & Schultz, 2004). This thesis also assumes that where IMC is the independent variable brand image is the dependent variable (IMC is antecedent to brand image).

The confusion relating to the definition of the brand identity concept (Nandan, 2005) may explain why there has been a surprising lack of marketing communications theory and research positing the foundational and formative role of brand identity in the IMC process. Since the unequivocal statement by Schultz (1998) that “the brand is the integrating factor around which all marketing and communication should be built” and “All forms of marketing and marketing communication must be integrated to build the brand and build value in the brand” (Schultz, 1998, p. 8) - sentiments repeated by Schultz and Kitchen (2000) when they wrote: “Undoubtedly, the brand has become or is becoming the dynamic hub around which all marketing effort and communication revolves” (p. 55) - the view that the brand is the integrating cornerstone of all marketing communications seems to have been assumed, overlooked, diminished, ignored or dismissed. At best, in recent years, only passing mention has been made of the determinant integrating role of the brand identity concept in the IMC process. (This was noted in the discussion in Section 2.3.6 above, which observed that in two of the most highly regarded IMC strategic planning models proposed to date - by Schultz and Schultz (2004) and Duncan (2005) - there is only implied or passing reference made to the brand identity concept). It also appears to be the case in the recent paper by Kerr and Patti (2013) when they discuss the operationalisation of the strategic integration (SI) construct, in order to diagnose the integration of IMC campaigns.

Kerr and Patti (2013) contend that “one of the major impediments to full scale adoption (of IMC) is the inability to operationalise the core components and achieve consensus on its defining constructs” (p. 1). They suggest that the future of IMC as an important management concept rests, in part, on a deeper understanding of its foundational tenant, ‘strategic integration’ (SI). Although strategic integration is the defining construct of IMC, Kerr and Patti argue, questions concerning how it is operationalised remain. It is still an abstract concept. The focus of Kerr and Patti’s paper is strategic rather than tactical integration; they agree with Kitchen et al. (2004) that most IMC efforts are tactical in nature and the discipline needs to command a more strategic focus.

From their review of extant marketing communications literature Kerr & Patti (2013) conclude that strategic integration may be operationalised as a set of nine factors: (1) common objectives, (2) coordinated strategy, (3) contribution to corporate mission, (4) shared budgets, measures and outcomes, (5) multiple communication disciplines, (6) multiple audiences, (7) multiple contact points, (8) strong leadership and (9) cross-functional teams. In an accompanying table the authors present the definition of each factor and a management checklist describing the conceptualisation and operationalisation of each factor. In factor 1 (common objectives), 'corporate branding' is not mentioned; in factor 2 (coordinated strategy), 'brand equity' and 'positioning' are two of six items mentioned under 'operationalisation'; in factor 3 (contribution to corporate mission) 'logo; theme line; corporate design elements' are mentioned under 'operationalisation'. In an otherwise excellent analysis, it is this writer's view that the analysis reflects a rather minimalist view of the role of the brand in the strategic integration process.

Kerr and Patti's paper goes on to describe how a Delphi study was conducted involving a panel of 17 practitioners and academics, all considered to be leading experts in the practice and theory of IMC. The experts were asked a series of open-ended questions seeking to determine what factors should be included in a measure of strategic integration. The research went through a series of phases resulting in the production of a list of 28 factors deemed to drive the strategic integration of marketing communication. Three of these factors relate to branding: (a) The level of integration of corporate and brand communications, (b) The communication of brand values, personality and reputation by the company, and (c) How well the company develops its internal branding. A fourth factor, 'the communication of a value proposition by the company' was removed from the analysis. From this research's discussion (above) of corporate brand identity and product brand identity it can be readily agreed that each of these four factors are important elements in the IMC process. However in Kerr and Patti's final model of 20 factors only one factor refers to branding: 'The level of integration of corporate and brand communications'. Kerr and Patti's definitive 20 factors are presented in Table 2.3.

Table 2.3: Measures of Strategic Integration

<i>Strategic alignment</i>	
1)	Integration of strategic plan into business unit plans
2)	The level of integration of corporate and brand communications
3)	Ability to monitor marketplace changes and adapt strategy
<i>Customer focus</i>	
4)	Identification of target audiences, including all internal and external stakeholders
5)	Use of knowledge and understanding of customers to identify customer needs
6)	Identification of customer touch points
7)	Customer service and support within company
8)	Monitoring of customer experience data
<i>Organisational structure and culture and communication</i>	
9)	The presence of organisational-wide leadership
10)	Evidence of vertical and horizontal integrations, including boundary spanning mechanisms
11)	Use of cross-functional planning
12)	Use of performance standards and reward systems to create highly motivated climate
13)	Culture of collaboration, teamwork and shared learning
<i>IMC capabilities</i>	
14)	Presence of an IMC manager
15)	Skills and expertise in IMC planning, management and implementation
16)	Ability to resource, create and support marketing communications strategy
17)	Shared budgets, measures and outcomes across marketing communication
18)	Use of multiple communication disciplines
19)	Targeting of multiple audiences
20)	Use of multiple contact points

Source: Kerr & Patti (2013) p. 19

It can be argued that Kerr and Patti either assume or overlook the brand identity construct as discussed above. This thesis contends that Kerr and Patti's 20 factors require a corporate brand identity premise upon which to integrate all the factors effectively; to be the central core or fulcrum that gives an overall sense of meaning to the factors.

In this regard it is appropriate to review Kitchen et al's 2013 definition of corporate brand identity: "A set of attributes that denotes the ways in which an organisation conducts itself in its interface with external publics" (p. 267). The construct includes an organisation's core values - the guiding principles that an organisation stands for - a set of unique values that bond an organisation; sometimes referred to as the 'brand essence' of an organisation. This thesis therefore concludes that Kerr and Patti's 20 factors are 'necessary' but 'insufficient' pre-conditions required to implement an effective integrated marketing communications campaign.

In accord with this thesis Nandan (2005) suggests that the role of IMC is to establish congruence between brand identity and brand image, thereby building and maintaining brand loyalty over time. This is an astute observation. Nandan notes that "a long-term relationship with a customer ensures a steady stream of revenue, which can provide financial stability to a company" (p. 273). Nandan offers as an example of this the fact that the lifelong value of a Lexus customer can be worth as much as \$600,000 to the company. According to Nandan (2005) the reward for congruence between brand identity and brand image - the result of effective IMC - is increased brand equity.

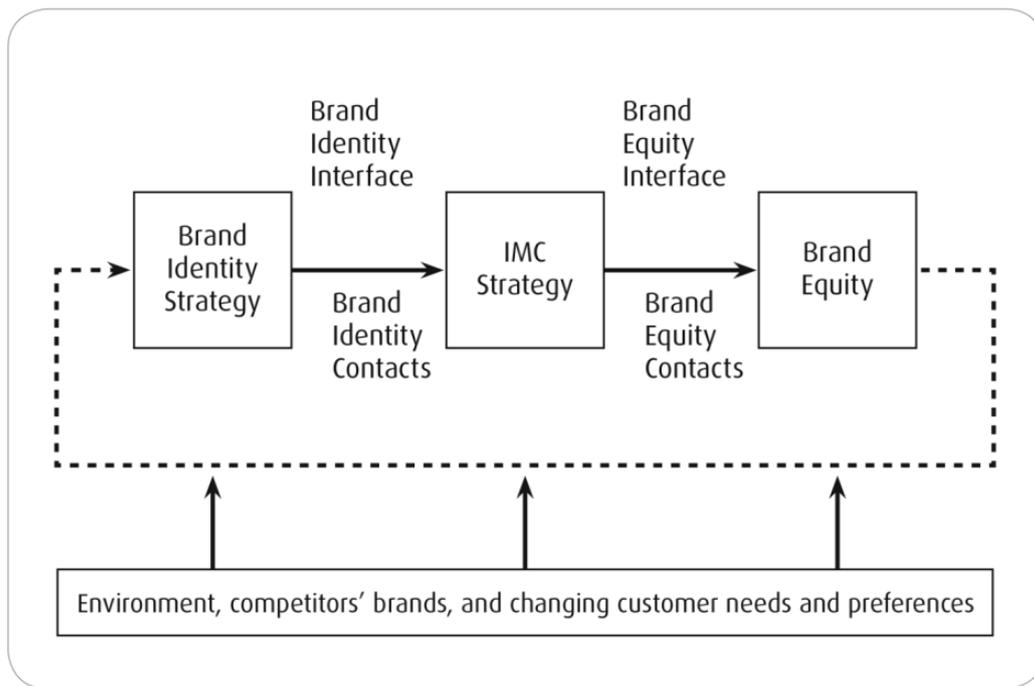
A second paper in accord with this thesis is the paper by Madhavaram et al. (2005) which appears to be the only research (to date) postulating a determinant role for the brand identity concept in the formulation of IMC (refer to Figure 2.11). Madhavaram et al. (2005) propose that brand identity strategy and IMC strategy are critical components in an organisation's brand equity strategy. They use Aaker's (1996) conceptualisations of brand identity in their schematic.

Madhavaram et al. (2005) present a brand equity strategy schematic that details the role of IMC in creating and maintaining brand equity. Inherent in this process is the role of brand identity in developing and implementing a firm's IMC strategy. Although a conceptual framework with testable research propositions is presented by Madhavaram et al. (2005) there has been no field research published to date in which these propositions are tested. Their paper is highly significant to this research in that it discusses the same core concepts that are the focus of interest in this thesis.

As shown in Figure 2.11 Madhavaram et al. (2005) propose that brand identity strategy and IMC strategy are critical components in an organization's brand equity strategy. Key concepts in Madhavaram et al's 2005 schematic include brand identity, IMC and brand

equity. They define brand equity strategy as “a set of processes that include acquiring, developing, nurturing and leveraging an effectiveness-enhancing, high-equity brand or portfolio of brands” (p. 69). A high-equity brand has “strong and highly favourable brand associations of customers” (p. 69). This concurs with Keller’s (1993) definition of customer-based brand equity (CBBE).

Figure 2.11: Brand Equity Strategy: A Schematic



Source: Madhavaram, Badrinarayanan & McDonald (2005) p. 72

Following Schultz (2004) they define IMC strategy as:

A set of processes that include the planning, development, execution, and evaluation of coordinated, measurable, persuasive brand communications programs over time with consumers, customers, prospects, employees, associates, and other targeted, relevant external and internal audiences (p. 70).

They conclude that an effective IMC strategy is an integral component of an effective brand equity strategy.

Madhavaram et al. (2005) use Aaker’s (1996) conceptualization of brand identity in their schematic. “Brand identity is seen as a unique set of brand associations that a brand strategist aspires to create or maintain” (p. 70). They define brand identity strategy as:

A set of processes that include the coordinated efforts of the brand strategists in (1) developing, evaluating, and maintaining the brand identity/identities, and (2)

communicating the brand identity/identities to all individuals and groups (internal and external to the firm) responsible for the firm's marketing communications (p. 70).

They propose that the consistent communication of the brand identity to brand stewards (all individuals and groups, within or external to an organization, who have responsibility for communicating the brand to customers, prospects and other stakeholders. e.g. advertising and public relations agencies) by brand strategists will ensure a more synergistic and effective IMC and they suggest that this in turn will lead to stronger customer-based brand equity (Keller, 1993). Ideally, the consequent consumer-held brand image will be congruent with the brand strategist's intended brand identity.

Following Aaker (1996, 2014), Aaker and Joachimsthaler (2000), de Chernatony, (2010), Kapferer (2008), Madhavaram et al. (2005) and Nandan (2005), the brand identity construct is proposed in this thesis as a marketer's 'blueprint' for a brand (de Chernatony, 2010); a statement of the brand's DNA (Ellwood, 2000). It is of interest to this research because the construct has the potential to facilitate the integration of a brand's marketing communications. The brand identity construct is therefore a fundamental focus of this research.

Having briefly discussed Madhavaram et al's (2005) model it must be noted that Reid, Luxton and Mavondo (2005) use the concept of brand orientation as an antecedent to brand identity in their discussion of the relationship between market orientation, brand orientation and IMC. They propose that both market orientation (MO) and brand orientation (BO) are necessary conditions for successful IMC.

Reid et al. (2005) suggest that market orientation "represents the culture of the organisation through the adoption of the marketing concept and the systems and processes that underlie being market oriented" (p. 11).

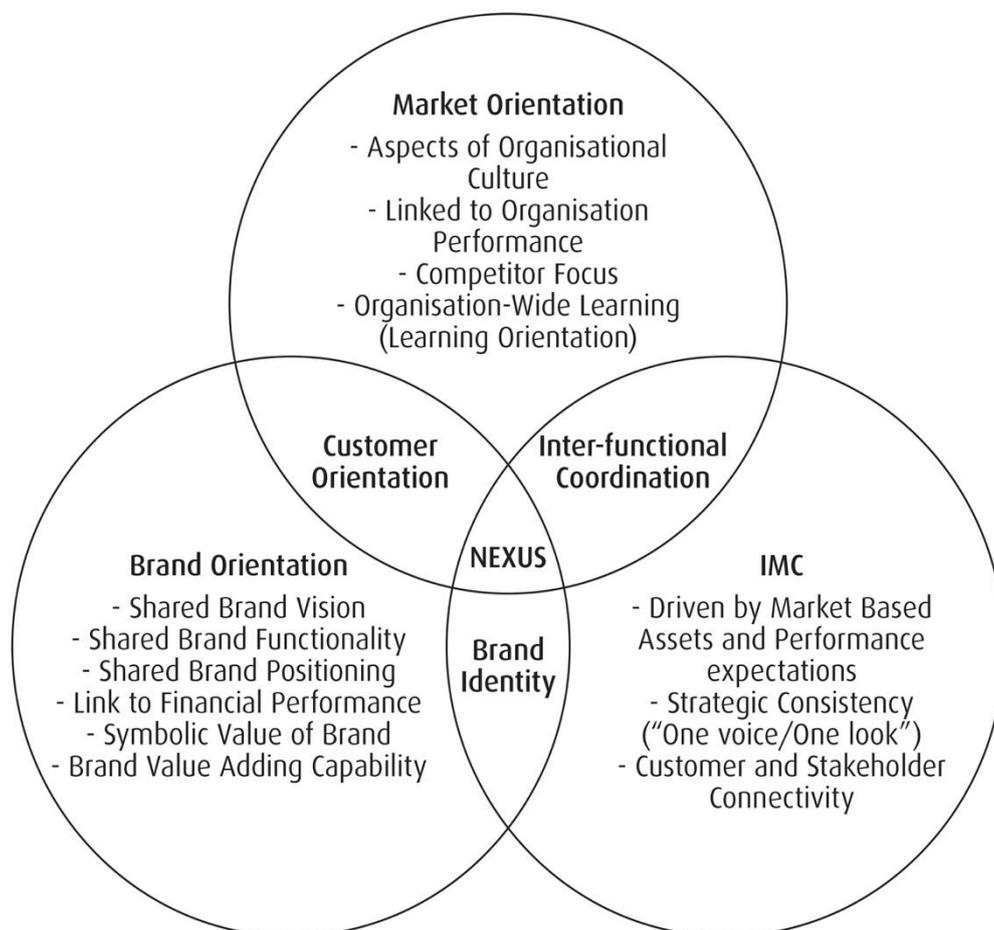
They further suggest that brand orientation:

Represents the functional or business unit focus on brands and brand strategies that support strong customer and stakeholder relationships regardless of the brand being at the corporate or product level, or being a service or a manufactured good (p. 11).

Reid et al. (2005) postulate that brand orientation is related to the development of brand identity in that the creation of a successful brand identity requires brand messages to be strategically driven and consistently synchronized in all forms of their communication. Brand orientation "provides a foundation for building and managing brands that are

distinctive, that provide functional and symbolic value for customers and stakeholders, and that are the basis for ongoing profitable relationships” (p. 17). They place brand identity (along with customer orientation and inter-functional co-ordination) at the nexus - the area where the dynamic interplay of IMC, MO, and BO occurs - of their conceptual model. They suggest that brand identity emerges as a critical concept in regard to marketing communication performance and brand performance. Reid et al. (2005) postulate that brand orientation mediates the relationship between market orientation and IMC and that IMC is directly and positively related to brand performance (refer to Figure 2.12).

Figure 2.12: Intersection of Integrated Marketing Communication (IMC) and Market and Brand Orientation



Source: Reid, Luxton & Mavondo (2005) p. 12; or Luxton (2008) p. 258

Following Reid et al.’s (2005) paper, Luxton (2008), in an unpublished PhD thesis, sought to test how IMC related to market orientation, learning orientation and brand orientation and to the organisational outcomes brand performance and financial

performance. Luxton's (2008) research found that market orientation and brand orientation have a direct and positive relationship with IMC and can be argued as being antecedent to IMC. Luxton (2008) found that both brand orientation and IMC had a direct and positive association with brand performance. Her findings also indicated a direct and positive association between brand performance and financial performance. IMC was found to be a partial mediator of the relationship between brand orientation and brand performance. Luxton's (2008) research supports the view that marketing activities such as IMC have a positive impact on brand performance and that IMC supports the development of the brand as a valuable market-based asset.

As noted above, Luxton (2008), along with Reid et.al (2005), postulate that brand orientation is conceptually distinct from and antecedent to the brand identity concept (which in turn is antecedent to the IMC concept). Although the brand orientation concept is defined at length in both publications, the brand identity concept is not. This raises the question: "What is the value and utility of making such a distinction?" Nevertheless, their research is conceptually and empirically supportive of this research and is, in this researcher's opinion, a very positive contribution to the IMC literature.

Meanwhile Ghodeswar (2008) proposes a conceptual model identifying strategic elements when brand building in competitive markets. Fundamental to successful brand building, he suggests, is understanding how to develop a brand identity; to know what the brand stands for and to effectively express that identity. Citing Aaker and Joachimsthaler (2000) Ghodeswar (2008) suggests that brand identity represents what the organisation wants the brand to stand for. His PCDL model has four elements: (P) Positioning the brand, (C) Communicating the brand message, (D) Delivering the brand performance, and (L) Leveraging the brand equity. According to Ghodeswar (2008) a brand's positioning is part of its brand identity and value proposition (citing Aaker, 1996) that needs to be actively presented to the target audience, demonstrating a competitive advantage over other brands. A brand's positioning helps to prioritise communication themes when communicating the brand message. Successful brands are built through the creative repetition of themes in a variety of media. The messages need to be consistent with a brand's values, personality and other brand identity dimensions. (IMC is implied here, but not mentioned). Ghodeswar (2008) suggests that companies need to continually track their brand's performance (in terms of brand recognition, brand recall and levels of purchase) against that of their competitors. A favourable attitude towards the brand can

lead to repeat purchase and brand loyalty over time. Finally, Ghodeswar (2008) suggests that a successful brand can be leveraged through line extensions and brand alliances such as co-branding. Case study analysis of three Indian brands support his PCDL model of brand building. Ghodeswar (2008) concludes that: “Consistency of integrated communications and message along the brand identity dimensions targeted towards customers is critical to the success of brand-building efforts by delivering a consistent, self-reinforcing brand image” (p. 10).

Although brand identity rather than IMC is the core focus of this paper, clear links between the two concepts are implied (even suggested) and are supported by Ghodeswar’s analysis of the three Indian case studies.

More recently Porcu, Kitchen, and del Barrio-Garcia’s 2011 Brand Image Management Conceptual Framework acknowledges Madhavaram et al’s support of their assertion that IMC is an integral part of a brand equity strategy - but they do not address the role of brand identity in the IMC process.

Even more recently, Porcu et al. (2012) published a review of 85 journal articles published between 1991 and 2011 focusing on the drivers, barriers and effects of IMC (this paper will be discussed in Section 2.3.10). Of relevance to this section of this thesis is Porcu et al’s conclusion from their literature review that market orientation and brand orientation (citing Reid et al. 2005) are antecedent to IMC as factors that drive integration.

This review of the brand identity-IMC related literature is necessarily brief because there is a paucity of papers positing the foundational and formative role of brand identity in the IMC process. This is both surprising and disappointing. Since Madhavaram et al’s (2005) paper only Reid et al (2005) and Luxton (2008) have addressed the relationship between the two constructs. The possibility of brand identity (expressed as corporate brand identity and/or product brand identity) as being “the integrating factor around which all marketing and communication should be built” (Schultz, 1998, p. 8) seems to have been largely overlooked by scholars. The possibility of corporate brand identity being a key factor in strategic corporate integration and product brand identity being a key factor in the tactical integration of marketing communications (two fundamental requirements of IMC theory) has similarly been overlooked by scholars. At best, only passing mention has been made to the determinant integrating role of the brand identity concept in the

IMC process. The role of brand identity as the integrating blueprint for all brand communications appears to have been ignored or overlooked by scholars.

However, this has not been the case with marketing communication *practitioners*. There are various expressions of the brand identity concept utilised by marketing organisations and advertising agencies in New Zealand and throughout the world. The brand book is frequently used by marketers to define their brand (Aaker & Joachimsthaler, 2000). Brand books are typically around 20 pages in length (Agency One Digital Creative Director) and will normally contain definitive statements relating to the brand's name, its history/story, its purpose/mission, its positioning, its personality, its core values, its essence, its graphics, logo and tagline.

Kapferer (2008, p. 172) contends that a brand's identity will be clearly defined once the following questions are answered: What is the brand's particular vision and aim? What makes it different? What need is the brand fulfilling? What is its permanent nature? What are its value or values? What is its field of competence - of legitimacy? What are the signs which make the brand recognisable?

Kapferer (2008) suggests that answers to these questions could constitute the brand's charter - contained in an official document (brand book) - to guide brand management and to ensure a single, solid, coherent entity for the brand.

A leading international advertising agency network, DDB Worldwide, ensures that each brand they advertise "has a clear, motivating, differentiating mission and purpose. The agency seeks to help ensure that all the brand's actions and communications are consistent with this single-minded vision" (DDB, 2003, p. 20). A 'brand book' enunciates this brand vision and identifies the foundational elements that make up the brand. It discusses the origins and history of the brand (Where do I come from?). It discusses the brand's field of competence; the business the brand wants to be in - and does not want to be in (What do I do?). It identifies the unique qualities that differentiate the brand from all other brands (What makes me different?). It seeks to define the target user or the needs-state that the brand addresses. It pictures the person that the brand most wants to have a relationship with (Who am I for?). It seeks to prescribe how the brand should behave and how it should express itself; what is its personality and its visual identity (What am I like as a person?). It seeks to define what is the brand's unique, driving purpose and how it wants to make a difference in the world (What do I fight for?). It endeavours to identify

what the brand fundamentally stands for and why that is important (What do I value?). Finally, it seeks to encapsulate the whole brand vision in a single phrase (What is an appropriate tagline?) (DDB Worldwide, 2003).

A second expression of the brand identity concept is a collection of design prescriptions in a manual called 'brand guidelines'. This document can run to 100 pages in length and is primarily a graphic design manual for the brand. It describes how the brand should look in any given environment and the elements that make up a brand's design identity (Wheeler & Katz, 2011).

These graphic identity manuals "define the norms for visual recognition of the brand, i.e. the brand's colours, graphic design and type of print" (Kapferer, 2008, p. 173). Most companies of any size have a logo and a tagline that differentiates them from their competitors. The tagline should be short, unique, easy to remember, and have no negative connotations. It should be trademarked and protected legally. It should evoke a positive emotional response.

The logo needs to graphically symbolise the brand in a unique way. Logos are "vessels for meaning" (Wheeler, 2009, p. 34); the gateway to the brand. The more the logo is used the more people understand what it stands for - although that meaning can evolve over time. "(Logos) are the fastest form of communication known to man" (Wheeler, 2009, p. 34).

The brand guidelines manual also includes guidance for the use of templates, typography and the application of corporate colours. These applications relate to letterheads, business cards, signage, websites, packaging, product design, vehicles, uniforms, advertising - and multiple additional items (for example: promotional products). A copy of the brand guidelines will usually exist on an organisation's computer server.

A third expression of the brand identity concept, which is becoming increasingly popular with both agencies and clients in New Zealand, is the 'brand manifesto'. A brand manifesto declares the core intention of a brand. It captures the purpose and values of the brand; it is the expression of the ambition that the brand owner has for the brand (Taylor, 2006). Today, people need to know why a brand does what it does and a brand manifesto is a way of communicating that intention emotionally and effectively in language that everyone can understand. It is a fusion of an organisation's mission statement with the

brand promise (Miletsky & Smith, 2009). Brands personify sets of beliefs and lifestyles, goals and missions. Increasingly consumers want to know what values these brands represent - and companies are responding with brand manifestos (www.fastcompany.com/1745401/last-word-branding).

A manifesto is “a public declaration of intent” (Collins English Dictionary and Thesaurus, 1993, p. 696). It is a declaration of one’s principles, policies, motivations and intentions. In business it is a corporate rallying cry, clarifying for customers and employees - and the general public - what the organisation stands for and what it believes is truly important. It must be authentic and must come from the heart. It must create an emotional response that is both inspirational and aspirational. It should unite everyone in an organisation with a set of ideals that allows them to work as one (www.brandingstrategyinsider.com/2013/05/creating-a-powerful-brand-manifesto).

A manifesto may be issued by an individual, a group, or a political party (manifestos relating to religious belief are generally referred to as creeds). Notable political manifestos include The United States Declaration of Independence (1776), The Communist Manifesto (1848) by Karl Marx and Friedrich Engels, and Mein Kampf (1925), by Adolf Hitler. One of the most widely used creeds in Christianity is The Nicene Creed (325). Manifestos and creeds are not intended to be comprehensive but to be summaries of core beliefs. So it is with the brand manifesto. A brand manifesto is the brand’s plan for a better world. Unlike a corporate vision statement or mission statement a brand manifesto seeks to turn intention into reality; they are ambitious, they are revolutionary, they are passionate. They crystalize and clarify the revolutionary intention of an organisation and ask others (employees, customers and stakeholders) to join together and make it a reality. There is a bias for action in a manifesto (Taylor, 2006). Brand manifestos can integrate corporate brand communications into a single statement.

One of the most outstanding brand manifestos published to date is from cult-brand Harley-Davidson. Their ‘creed’ perfectly captures the bad boy rebel spirit of the brand. The video version can be viewed on YouTube (Harley-Davidson Motor Cycles, 2007, ‘Creed’ Film. YouTube: 22 November 2007).

*We believe in going our own way
No matter which way the rest of the world is going
We believe in bucking the system that’s built to smash individuals like bugs on a
windshield*

*Some of us believe in the man upstairs
All of us believe in sticking it to the man down here
We believe in the sky and we don't believe in the sunroof
We believe in freedom
We believe in dust, tumbleweeds, buffalo, mountain ranges, and riding off into the sunset
We believe in saddlebags and we believe that cowboys had it right
We believe in refusing to knuckle under to anyone
We believe in wearing black because it doesn't show any dirt or weakness
We believe the world is going soft and we are not going along with it
We believe in motorcycle rallies that last a week
We believe in roadside attractions, gas station hotdogs, and finding out what is over the next hill
We believe in rumbling engines, pistons the size of garbage cans, fuel tanks designed in 1936,
freight train sized headlights, chrome, and custom paint
We believe in flames and skulls
We believe life is what you make it
And we make it one hell of a ride
We believe the machine you sit on can tell the world exactly where you stand
We don't care what everyone else believes
Amen*

Harley-Davidson Motor Cycles - Live by it.

Aaker (1996) observes that “Harley-Davidson is much more than a motorcycle; it is an experience, an attitude, a lifestyle, and a vehicle to express who one is” (p. 138). The above brand manifesto perfectly expresses this ethos. It is an expression of the company’s purpose - “Harley-Davidson fulfils dreams of personal freedom” (Harley-Davidson Inc., 2014, p. 2) - and also of its five overarching values: tell the truth; be fair; keep your promises; respect the individual, and encourage intellectual curiosity.

These everyday values are the basis of the company’s Code of Business Conduct (www.harley-davidson.com/everyday-values). This code was created for and applies to all employees including members of the Board of Directors. It is intended to promote honest and ethical conduct, responsibility and accountability across a wide range of possible business situations and activities. It is a framework to guide the actions of all employees. It is, in effect, a corporate brand identity statement. CEO Keith E. Wandell writes: “The Code reminds us that our Valued Behaviours should shape our decisions and it is critical that we all understand its importance” (Harley-Davidson Inc., 2014, p. 4). The following list summarises the Harley-Davidson Inc. ‘Valued Behaviours’: be accountable; model integrity; value individuality and diversity; inspire teamwork, and encourage creativity

(Harley-Davidson Inc. 2014. Everyday Values. The Harley-Davidson Code of Business Conduct).

The brand manifesto is the culmination of brand strategy development work. Brand manifestos typically serve as the springboard for advertising creatives to come up with a big idea for the brand. The brand manifesto can help to re-state or re-position a brand in the marketplace. It is the distillation of the purpose, function, vision, values and other important attributes of the brand. It is a very tight brief for creatives to work from.

Phil Teer (2014), writing in Campaign (UK) magazine observes:

“Manifesto brands stand for a cause, have something to say and are ready to agitate...They are defiant, they are everywhere and they are growing...Manifestos are the start of a movement...a series of demands... (they) hold everything together” (p.16).

The brand manifesto is probably the most popular current expression of the brand identity concept embraced by creative agencies in New Zealand, as they create IMC for their clients’ brands.

A recent New Zealand example of a brand manifesto, included in an international award-winning creative effectiveness case study by Colenso BBDO Auckland for their client, Bank of New Zealand, is presented below:

*We are a bank for people who believe that the world is for them, not against them.
Who believe they can achieve more and are prepared to take action to get there.
We stand for progress, for everyone’s ability to move forward no matter where they
are standing right now.
Because we believe that it’s not how much money you have, but what you do with it
that counts
We will fight against fear of money, and against wasted potential.
We will help our customers, our communities and our country to be good with their
money.
Because if we’re all good with money, we can all do good with money.*

(BNZ, 2014).

The manifesto was at the heart of the strategy to re-launch the bank - whose market share had declined and who struggled to differentiate itself in a low-involvement category (many New Zealanders see banks as a necessary evil). The challenge was to re-launch the bank to New Zealand and in doing so seize back the leader’s mantle that it had held in previous years. The campaign strategy involved a teaser campaign to start social conversations about money - a taboo subject in New Zealand - and a series of outdoor and

TV advertisements were created using the themes, 'money is good' or 'money is bad'. The bank decided that if they were to own the leadership position they must focus on the core of the category: 'Helping their customers, communities and country to be good with money - No matter what'.

They developed a brand manifesto; a short paragraph that summed up the 'new' BNZ. Fundamentally, it was about knowing what position they wanted to occupy in the market, and going after it with a single-minded focus. The new BNZ would focus on bringing the subject of money out into the open; they would get people talking about money. The creative idea was to spark debate about whether money is good, or bad, and then resolve the question with BNZ's new positioning: 'Its neither - what matters is what you do with it. Be good with money'. The communication strategy was to start and own a conversation. There was a clear two-phase media strategy: Tease and Reveal.

The campaign was a success. New Zealanders have started to think differently about BNZ. The bank is now on peoples' consideration list and since the campaign launch the bank has seen more than ten times previous net customer growth; a positive return on investment of over 100% in the first year. *In addition, the 'be good with money' philosophy is now thoroughly embedded into the BNZ culture and drives all of the bank's business decisions* (BNZ, 2014).

The creation of brand manifestos normally falls to the agency Account Planner. However, it is frequently a collaborative process which includes the client, agency client service executives and creative executives as well as the Account Planner.

A fourth expression of the brand identity concept, used by both agencies and clients in New Zealand, is the 'brand on a page' statement (refer to Appendix 2.5). Leading international brand consultancy, Interbrand, has created a template that their clients can use to define their brands in a succinct manner. The brand on a page template can assist organisations when briefing internal teams or external agencies by presenting them with a clear definition of their brand. The template includes all the basic elements required for a strategic statement of a brand's core identity. It is written in straightforward language and is easy to understand. It is restricted to a single page. It is a statement of the brand proposition; the most inspiring and compelling thing that can be conveyed about a brand to its stakeholders. The proposition should differentiate the brand from its competitors, it

should be relevant to the target audience, and it should provide a credible focus for all brand activities (Interbrand, 2013).

Participants in this research reported that the brand on a page is a document more commonly used by marketing departments than advertising agencies in New Zealand. In their opinion advertising agencies are more likely to favour the brand manifesto over the brand on a page as a stimulus for creative ideas. However, it is not uncommon for organisations to have both a brand on a page and a brand manifesto statement in their marketing communications toolkit.

By way of summarising this section it can be concluded that brand identity statements, in various combinations of the four expressions discussed above, are considered essential components in many marketing practitioners' brand management toolkits. Surprisingly, this is not yet the case in the academic community.

The next section will discuss what constructs are considered antecedent to, and consequent to, the IMC construct.

2.3.10 The Antecedents and Consequences of IMC

This thesis takes the view that the brand identity construct is antecedent to the IMC construct, which in turn is antecedent to the brand image construct (a position supported by Aaker, 1996, 2014; Aaker & Joachimsthaler, 2000; de Chernatony, 2010; Ghodeswar, 2008; Kapferer, 2008; Luxton, 2008; Madhavaram et al. 2005; Nandan, 2005; and Reid et al. 2005).

Reid et al. (2005) and Luxton (2008) argue that Market Orientation and Brand Orientation are antecedent to IMC and that IMC is a partial mediator of the relationship between Brand Orientation and Brand Performance. They also argue that IMC has a positive impact on brand performance and supports the development of the brand as a valuable market-based asset.

Porcu et al. (2012) undertook a systematic review of all IMC academic literature published between 1991-2011 (including five textbooks) to identify IMC antecedents and consequences. As a result of their analysis a number of factors that they suggest drive or hinder integrated marketing communications are presented. The factors are presented as hypotheses (refer to Table 2.4).

Firstly they discuss the antecedents of IMC and classify them into two categories: endogenous and exogenous antecedents. Endogenous antecedents include factors that relate to top management, interdepartmental dynamic, organisational systems, business size, its typology/sector, and other variables related to business management. They express the factors relating to top management in hypotheses 1-3. Porcu et al. (2012) then specify the factors relating to the interdepartmental dynamic. These are presented as hypotheses 4-10. The authors next identify factors relating to organisational systems, structures and factors that influence the implementation of IMC. These are advanced as hypotheses 11-17.

Within the exogenous antecedents group, factors that drive or hinder the development of IMC include the following: the level of competition, the level of technology turbulence, and the cultural and institutional environment in which the organisation operates. These factors are expressed as hypotheses 18-20.

Table 2.4: The Antecedents of IMC

Endogenous antecedents

<i>Top Management</i>	
1)	Top management’s commitment positively influences the implementation of IMC programmes
2)	Top management’s attitude towards change positively influences the implementation of IMC programmes
3)	Top management’s risk tolerance positively influences the implementation of IMC programmes
<i>Interdepartmental Dynamic</i>	
4)	Market orientation positively influences the implementation of IMC programmes
5)	Brand orientation positively influences the implementation of IMC programmes
6)	Professional training and expertise in cross functional management positively influences the implementation of IMC programmes
7)	Horizontal communication positively influences the implementation of IMC programmes
8)	Internal conflicts and departmentalization negatively influence the implementation of IMC programmes
9)	The level of cross-functional coordination positively influences the implementation of IMC programmes
10)	Market orientation and brand orientation have a reciprocal positive influence
<i>Organisational Systems and Structures</i>	
11)	The division of the organisation into a large number of departments negatively influences the implementation of integration programs
12)	A centre-based structure of the organisation negatively influences the implementation of IMC programmes
13)	Consensus decision-making models positively influence the implementation of IMC programmes
14)	Individual compensation systems negatively influence the implementation of IMC programmes
15)	Organisation size positively influences the implementation of integration programmes
16)	A leadership position of the organisation in the marketplace positively influences the implementation of IMC programmes
17)	The typology of the organisation (e.g. service organisations versus product- focused organisations; large manufacturing companies versus small service organisations) significantly influences the implementation of IMC programmes

Exogenous antecedents

<i>Business Management Variables</i>	
18)	The level of competition in a marketplace where the organisation operates positively influences the implementation of IMC programmes.
19)	Technological turbulence positively influences the implementation of IMC programmes.
20)	The cultural and institutional environment where the organisation operates significantly influences the implementation of IMC programmes.

Source: Porcu, del Barrio-Garcia & Kitchen (2012) pp. 329-336

Porcu et al. (2012) next proceed to analyse and classify the *consequences* derived from the application of the IMC paradigm; the effects of IMC. These factors are classified into three categories of consequences and relate to the following: marketing communication performance, brand performance, and stakeholders. The marketing communication performance factors are expressed as hypotheses 1-4 and the correlation between the implementation of the IMC process and business or brand performance is advanced as hypotheses 5-8. The authors note the existence of research supporting the notion of an ‘IMC chain of productivity’ relating to customers and brand value. They suggest that:

The market-based results deriving from IMC may be related to the concept of a brand value chain, which identifies a number of marketing investments and their potential impact on consumer minds, market performance and value for shareholders (p. 340).

Hypotheses 9-16 are deduced from these research contributions.

Table 2.5: The Consequences of IMC

<i>Marketing Communication Performance</i>	
1)	The level of implementation of IMC positively influences marketing communication performance
2)	The level of implementation of IMC has a positive influence in achieving campaign objectives (direct and indirect)
3)	The level of implementation of IMC positively influences operational/operative efficiency and the reduction of internal turf battles
4)	Marketing communication performance positively influences brand performance
<i>Brand Performance</i>	
5)	The level of implementation of IMC positively influences brand reputation/awareness
6)	The level of implementation of IMC leads favourable attitudes towards the brand
7)	The level of implementation of IMC has a positive impact on brand preference
8)	The level of implementation of IMC has a positive influence on brand purchase intentions
<i>IMC Chain of Productivity</i>	
9)	The level of implementation of IMC positively influences customer attitudes
10)	The level of implementation of IMC positively influences customer loyalty
11)	The level of implementation of IMC positively influences customer retention
12)	The level of implementation of IMC positively impacts upon the organisation's relationships with external agencies
13)	Marketing communication outcomes positively influence financial results
14)	Brand performance positively impacts financial returns
15)	Customer-related outcomes positively influence financial performance
16)	The outcomes at the level of relationships between the client-organisation and external agencies positively influence the organisation's outcomes

Source: Porcu, del Barrio-Garcia & Kitchen (2012) pp. 336-340

The above research-based list of hypotheses postulating 20 antecedents and 16 consequences of IMC illustrates the evolution of the IMC construct from a strictly tactical tool to a strategic outside-in, customer-based perspective involving an entire organisation and not just the area of marketing communications.

In many respects Porcu et al's 2012 identification of 20 antecedent factors that drive IMC presage Kerr & Patti's 2014 list of 20 definitive factors that drive the strategic integration of marketing communication. It should not be surprising therefore that this thesis's concerns relating to Kerr & Patti's 20 factors (arguing for a stronger acknowledgement of

the foundational role played by the brand identity construct in the strategic process) also applies in some measure to Porcu et al's paper. However, as the latter paper is a summary of the body of extant IMC research this researcher's comments relate only to the body of research and not to the authors' summary of that research. In other words, this thesis contends that there is a gap in the marketing communications research literature relating to the determinant role played by the brand identity construct in the implementation of IMC.

The thesis will now look at the role of the creative advertising agency in the IMC implementation process.

2.3.11 The Role of the Creative Advertising Agency in the IMC Implementation Process

The creative advertising agency has played a major role in the implementation of integrated marketing communications ever since the IMC concept was first mooted. That role continues today. In the 21st century marketplace the agency-client dynamic may be viewed less as a supplier-buyer relationship and more as a symbiotic partnership in which the two parties are mutually dependent upon each other (Eagle, Dahl, Czarnecka and Lloyd, 2015). Indeed Gould, Grein and Lerman (1999) argue that agency-client integration at an organisational level is fundamental to the successful implementation of IMC. They define this type of integration as "the formation, implementation and management of an interorganisational, agency-client network for the common purpose of planning and producing effective integrated marketing communications" (p. 2). They suggest that IMC requires the active cooperation of all client and agency parties to achieve this type of integration and to reach shared goals - a process which involves many joint decisions by the cooperating parties. Ideally, they suggest, there should be symbiotic consistency, consensus and unity in this process. Gould et al. (1999) conclude that without this unity of purpose "inept strategic thinking, poor planning and failed communications will result" (p. 9).

The next section will review the body of research that investigates the relationship between agencies and clients in the implementation of IMC, with particular reference to the New Zealand marketplace.

2.3.11.1 Research Involving Advertising Agencies and IMC: New Zealand Research

From the late 1970s US advertising agencies recognised that their marketplace was changing and that they were losing their status as the gurus of the marketing communications business. Marketplace trends such as the fragmentation of the media and the increase in targeted marketing drove clients to discover new ways of communicating with their customers (Schultz et al. 1993). In order to retain the money that their clients were spending in media other than advertising, advertising agencies embarked on an aggressive acquisition spree throughout the 1980s, purchasing public relations, sales promotion, and direct response agencies. This was an attempt to offer their clients more than just advertising. In most cases these newly acquired agencies were left to operate as independent profit centres and were not involved in what are now described as integrated marketing communications campaigns for clients (Duncan & Caywood, 1996).

However by 1989 advertising agencies had come to recognise that IMC was a planning system that could offer their clients the potential benefits of synergy and increased communication impact. The 4As formed a task force with a brief to define IMC from the agencies' point of view, to conduct research on the acceptance of the IMC concept among client organisations, and to determine the future direction of 'integration' for the 4As. They engaged Don Schultz and his colleagues at the Medill School at Northwestern University to assist them in this process (Schultz, 1993).

The first significant study on IMC was conducted by Caywood, Schultz & Wang in 1991 when they surveyed 132 US advertising agencies executives concerning their perceptions and beliefs regarding the IMC concept. Since then there have been well over 100 articles and papers about IMC published in various journals (Kitchen & Burgmann, 2010). Many of the studies have concentrated on the perceptions and beliefs of advertising and PR executives in the United States. Most empirical studies have used a quantitative approach; few qualitative studies exist (Burgmann, 2007; Kitchen & Burgmann, 2010, Kitchen et al. 2004).

The research undertaken by Caywood, Schultz and Wang (1991), was the first academic study to attempt to provide some understanding of the IMC concept as it was perceived and practiced in the US at that time (it became the first of a series of investigations devoted to exploring the development of the IMC concept throughout the world). While there had been industry discussion and trade press articles prior to this study concerning

what the concept meant, how it worked in the marketplace and its value to practitioners, there was little or no formal, academic understanding of the concept, of IMC theory or of basic IMC principles.

Following Caywood et al.'s 1991 study, in 1997 Kitchen and Schultz undertook exploratory studies of senior advertising agency executives in the United States and the United Kingdom, investigating how they perceived, utilised, and developed IMC on behalf of their clients. The research instrument was an 89 item self-administered questionnaire, adapted from the questionnaire originally developed by the Medill School Faculty at Northwestern University for their 1991 study. It was sent to selected lists of 4A's members in the United States and IPA members in the United Kingdom. In both countries the surveys found that agency leaders considered IMC to be an important concept, that their clients felt the same way, that it was not a management fad but a good idea. However they had less idea on why IMC was a good idea, how it added synergy and value to traditional campaigns - and how that value might be measured effectively; how IMC should be executed and implemented. They also believed that the process should be led by the client rather than agencies and, given client support, they could create effective integrated marketing communication programmes across different client business units and divisions. Kitchen and Schultz concluded from these studies that there was much to be desired in terms of the scholarly development of the IMC concept and the approach to the implementation of IMC. They observed that there was a critical need for a commonly agreed-upon definition and theory base, and that execution, implementation and measurement were other key areas needing further research (Kitchen & Schultz, 1997; Schultz & Kitchen, 1997).

Given the geographic context of this thesis, it is both relevant and appropriate to now review a number of studies that specifically focus on the understanding and attitude of New Zealand advertising agency executives and their clients toward the IMC concept.

In 1999 Kitchen and Schultz conducted a multinational cross-cultural exploratory study analysing data from the United States, the United Kingdom, New Zealand, Australia, and India. This research was concerned with developing a wider international perspective on the levels of understanding, implementation and usage of IMC as reported by senior advertising agency executives in five English-speaking nations. The research attempted "to consider the theoretical underpinnings and support for the rapid growth of IMC with

regard to advertising agency acceptance, involvement, and development” (Kitchen et al. 2004, p. 20). Once again the research instrument was an 89-question, self-administered questionnaire that was an adaptation of a questionnaire originally developed by Caywood et al. (1991). Questions varied slightly from country-to-country in terms of positioning and terminology. Questionnaires were mailed with the assistance of data from the respective national advertising agency associations. In each case the sample used was a convenient sample. There were 20 respondents from New Zealand (34% of those sampled). The research found that awareness and understanding of the IMC concept in all five countries was widespread. However there was little evidence to suggest that understanding of the concept had progressed beyond the ‘one sight, one sound’, ‘inside-out’ mentality. The majority of firms in the study were concerned primarily with definitional issues (what does the concept mean?) and implementation issues (how is IMC practically implemented?) - issues that relate to the tactical coordination of marketing communications; the first stage in Schultz and Kitchen’s (2000a) Four Levels of Integration model, referred to in Section 2.3.5 above. There was consensus amongst all respondents concerning the need for effective evaluation and measurement of IMC programmes. It is interesting to note that Australia and New Zealand were considered to have moved least toward embracing the IMC concept and, compared to the United States and Britain, were focused largely on traditional above-the-line, mass media advertising (Kitchen & Schultz, 1999).

As part of, and in addition to, the Kitchen and Schultz (1999) study, research seeking data from New Zealand respondents was undertaken by Eagle, Kitchen, Hyde, and Padisetti (1999) with the assistance of the local NZ Association of Advertising Agencies (3As) and the Association of New Zealand Advertisers (ANZA). This was a two-part study that compared the perception of clients with those of senior advertising agency executives regarding how and in what way IMC was developing in New Zealand at that time. The study sought to answer three questions: What is IMC (and is it really different)? How does IMC work? How can IMC be measured?

In the pilot study a postal questionnaire was used. There were 20 responses from advertising agency executives (34% of those sampled) and 22 from marketing organisation executives (25% of those sampled). A significant finding of the pilot study was that many New Zealand marketers and advertising agencies were relying upon monitors of advertising to assess the effectiveness of IMC. These monitors most likely

failed to measure the unique contributions of other marketing communication vehicles, apart from advertising, calling into question their validity as measurement techniques of IMC.

The second part of the research utilised the postal questionnaire that had been used by Caywood et al. (1991) and Kitchen and Schultz (1997), but adapted to ensure relevance to the local business environment. This second stage of the study also contributed to a larger international survey of five countries, seeking to explore cross-cultural perceptions of the multiple dimensions of the IMC concept (Kitchen & Schultz, 1999). As in the pilot study all members of the 3As and ANZA received an invitation to participate in the research. There were 19 responses from advertising agencies (32% of those sampled) and 24 responses from marketing organisations (27% of those sampled). A unique aspect of Eagle et al.'s research was that the small size of the New Zealand marketing and advertising fraternities gave them the opportunity to compare responses from both sectors. These insights offered the possibility of being used to create comparative studies in much larger markets. The research confirmed the view that IMC had an important role to play as a response to substantial marketplace changes. "IMC (was) being driven by fundamental changes in the marketing communications business such as the development of databases, media fragmentation, and client desire for interaction, coordination and synergy" (Eagle et al. 1999, p. 103).

The critical issue concerning IMC was considered to be the evaluation and measurement of integrated programmes while the main value of IMC was considered to be consistency, impact and continuity. Agencies were much more concerned with practice and facilitation than with understanding how or why IMC needed to be done. Some of the comparisons between the two groups of respondents included the findings that marketers generally had a higher level of education than agency executives; more marketers considered that they spent a lot of time on IMC issues than agency executives; both groups agreed that promotional budgets were split approximately 60/40 in favour of advertising against other areas of communication; almost all respondents agreed that their communications were integrated. In most client cases (70%) this integration had only been undertaken for the previous three years. Agency respondents believed that all marketing communication programs should be integrated to ensure that brand image and brand values were communicated consistently. Both groups considered direct marketing to be the discipline

most integrated with advertising while public relations was considered to be the least integrated with advertising.

There was strong agreement between marketers and agencies that ‘the idea of presenting one voice and one brand personality will increase in importance’ and that clients would be willing ‘to compensate ad agencies for the additional responsibility of developing integrated communications’. The research found that there were variations of opinion between the two groups in terms of who should coordinate and control the IMC process. Marketers felt strongly (87%) that they should act as the central point for coordination of the various independent agencies while this view was held by 67% of agency executives. Both groups strongly agreed that the future success of advertising agencies depended on them helping their clients to develop IMC programmes.

The next phase in the above extended study of the New Zealand advertising and marketing industry was conducted in mid-1998 and was reported in a paper by Eagle and Kitchen (2000b). This paper analysed the extent to which agencies were requested by clients to develop and implement IMC programmes. This phase of the research involved telephone interviews with ten senior executives belonging to ANZA and ten senior executives from the 3As. Almost all of these respondents had participated in the earlier phases of the study and were familiar with the key issues involved. The interviews took an average of 20 minutes to complete and involved a number of open-ended questions to “determine perceptions of the value, necessity and worth of IMC programmes, and experiences in developing and implementing programs (including successes, and facets that had proved unsuccessful)” (Eagle & Kitchen, 2000b, p. 673). Barriers and obstacles to the development of IMC programmes were also explored, recorded and transcribed. Responses to questions were then compared, both within and between the two industry sectors, to identify common themes and to relate responses back to the literature review.

All respondents agreed that IMC is regarded as a valuable concept and a fundamental change in the thinking and practice of marketing communications - although still in an emergent phase. Agency respondents identified IMC as ‘an effective means of achieving consistency in brand communications’. They indicated that success in achieving this goal related to the development of ‘brand blueprints’ - key guidelines and principles fundamentally important in the process of building brands. Several marketing

respondents noted that IMC had forced practitioners to focus on brands and specifically on the impact of marketing communications in building brands.

All respondents also agreed that perceived barriers to the implementation of IMC included turf wars, preconceptions and mind-set barriers, private agendas and a short-term focus. Antidotes included a commitment to teamwork as an essential prerequisite; agency respondents endorsed the concept that all participants should be 'brand guardians'. They noted the need for education, re-education, up skilling and training to change negative mind-sets. Both agency and marketing respondents agreed that client organisations should assume control, coordinate and lead the strategic direction of all marketing communications activity. Several marketer respondents conceded that client staffing changes sometimes made coordination difficult and this was an ongoing problem.

A key issue in regard to the future success of IMC involved the issue of 'how to comprehensively and accurately measure IMC's overall effectiveness - and that of its individual component parts'. Eagle and Kitchen (2000b) suggest (following Schultz et al. 1993) that there is a need to change from attitudinal measurements of communication effectiveness to the measurement of behaviourally segmented responses. In conclusion, they also suggest the need to empirically and conceptually investigate the relationship between marketing communications and corporate communications.

A further phase (described by the authors as the third phase) in the study of IMC in New Zealand advertising agencies was presented by Eagle and Kitchen (2004). This research provided "a detailed analysis of the way in which understanding of IMC and its management and implementation are evolving" within advertising agencies in New Zealand. Advertising agencies were selected because they, rather than Public Relations, direct marketing or sales promotion organisations, were the dominant marketing communication supplier in New Zealand.

The study looked for evidence of development in the understanding and implementation of the IMC paradigm by its inclusion in marketing strategy, by the use of a range of non-traditional marketing communication tools, and in the way in which IMC campaign effectiveness was measured. The study reported the perceptions of senior advertising executives in this regard. A questionnaire was distributed by email to senior executives in all of the 59 advertising agencies belonging to the Communication Agencies Association of New Zealand (CAANZ). 27 responses were obtained (a 47% response rate).

Research findings included the following: 96% of respondents reported that they offered IMC services to their clients; agencies reported that they were offering an ever increasing range of services including advertising, public relations, direct marketing, sales promotion, the Internet, design, event management, IMC, and media placement. Where these services were not offered in-house they were offered in conjunction with separate companies that were often owned by the same parent organisation. Eagle and Kitchen (2004) comment that these results were similar to those obtained by Kitchen, Schultz, Kim, Han and Li (2004) in the United Kingdom, meaning that New Zealand's uptake of IMC had increased rapidly since the Kitchen and Schultz (1999) study.

The issue of coordination and control of IMC campaigns was explored in some depth and there was strong evidence supporting the view that joint control by client and agency over all aspects of IMC development, implementation and evaluation was the most desirable option. This represented a significant change in thinking from previous phases of the research programme. There was also a significant change in thinking from previous studies with a shift from a client-centred IMC focus towards a consumer-centred focus (i.e. From 'inside-out' thinking to 'outside-in' thinking). However, Eagle and Kitchen (2004) conclude, the focus remained on tactical rather than strategic factors.

The research also explored perceptions of how the effectiveness of integrated campaigns was measured and found that while individual campaign components continued to be evaluated there were also some attempts to measure synergistic effects. However respondents argued that any measurement system utilised needed to be appropriate to the objectives of specific campaigns and this was not always possible using a standardised measuring metric. Eagle and Kitchen (2004) lament:

In spite of the professed commitment to an outside-in orientation, there is no evidence that organisations are actively seeking to listen to their customers or even to adjust market offerings - or communications - in the light of what they hear. Nor is there evidence of any serious endeavour to utilise information technology such as segmented databases to identify, target and measure the response of specific market segments... In New Zealand, as elsewhere, ad agencies display a remarkable proclivity to be anchored at Stage 1 - in the Schultz & Kitchen, 2000 'Stages in IMC Development' model' (Eagle & Kitchen, 2004, p. 5).

The research confirmed a marked evolution in thinking regarding IMC in New Zealand. In seven years IMC had become the accepted norm for agencies offering services to clients. However ad agencies were limited in their ability to deliver an IMC that was

anything more than ‘an orchestration of promotional mix elements acting in harmony’ if this was where their clients were in their thinking. Eagle and Kitchen (2004) suggest that future research needed to focus on clients - and their lack of focus on consumers - to reveal just where IMC is at and what it means.

In spite of the above sentiments, Eagle et al. (2007) undertook further research to examine ‘the theoretical and practical applicability of IMC’ in New Zealand and the UK. This was a two-country qualitative study to assess the views of advertising agency members of the UK Institute of Advertising Practitioners (IPA) and the Communications Agencies Association of New Zealand (CAANZ). The research addressed four questions: Is a clearer picture of IMC emerging? Where is IMC going? Is there evidence to support the development of a central theory of IMC? If not, why not? 80 respondents from the IPA were surveyed (67% of those sampled) and 27 respondents from CAANZ were surveyed (47% of those sampled). In the UK respondents received the questionnaire by mail, in New Zealand the same questionnaire was distributed electronically and could be completed online or in hard copy format.

Research findings were as follows: Agency executives in both countries were united in supporting the utility of IMC as a concept. Respondents reported that 92% of UK clients and 50% of New Zealand clients required integrated programmes. In both countries agencies indicated that they offered a wide range of advertising services to clients - considered by some to be more accurately described as ‘marketing communications services’. These included advertising, public relations, direct marketing, sales promotion, the Internet, design and print, event management, media placement, relationship marketing, point-of-sale design, design, client-based solutions, technology-based client solutions, brand consultancy and data marketing. Advertising was still considered the most important communication discipline in both the UK and New Zealand while sales promotion and direct marketing were more highly regarded in the UK and personal selling was more highly regarded in New Zealand.

For some respondents integration simply meant integrating other promotional tools with advertising but for most the future of IMC included greater inter-agency and interdisciplinary cooperation. In both countries there was a bias against PR and few agency personnel took the view that PR would be able to exercise campaign leadership or be a more appropriate lead discipline in specific integrating campaigns. In both the UK

and New Zealand there was a move towards the joint control of IMC activities by agencies and clients in a symbiotic relationship.

The measurement and evaluation of IMC campaign effectiveness continued to be a major problem in both countries (as reported in earlier studies). As per Eagle and Kitchen's earlier 2004 study respondents expressed the view that measurement systems utilised should be determined by the objectives of specific campaigns. The measurement of campaign synergies was considered impracticable. There was no evidence in this study that organisations were actively seeking to listen to their customers, or of any serious endeavour to utilise information from segmented databases, or to measure the responses of specific market segments. In both countries agencies appeared to be content with the tactical coordination of marketing communications. However the authors observed that 'ad agencies will do only as they are instructed by client organisations' so both clients and agencies needed to move beyond this initial, tactical stage of IMC to focus on customers and consumers and the measurement of behavioural ROI. This conclusion is identical to the conclusion arrived at some three years earlier in Eagle and Kitchen's 2004 research.

Eagle and Kitchen and their associates have, over almost a decade, produced a significant body of research relating to the theory and application of IMC by advertising agency executives and their clients in New Zealand. Their research is an important benchmark for the discussion and evaluation of the research contained in this thesis.

Since the above research was published most of the larger New Zealand advertising agencies have adopted the account planning function as part of the creative planning process in their creation of IMC campaigns for their client brands. This function is not alluded to in Eagle and Kitchen's research. The next section looks at the role of the Account Planner in the agency creative process.

2.3.11.2 The Role of the Account Planner

Account planning is an important focus of this research. The Account Planner's primary function is to produce the creative brief (Baskin, 2001; Fortini-Campbell, 2001) and "the creative brief is still the most important piece of paper that circulates within agencies" (Butterfield, 1985, p. 3). The creative brief is discussed in detail below. It is the platform upon which creative agencies create integrated marketing communication campaigns.

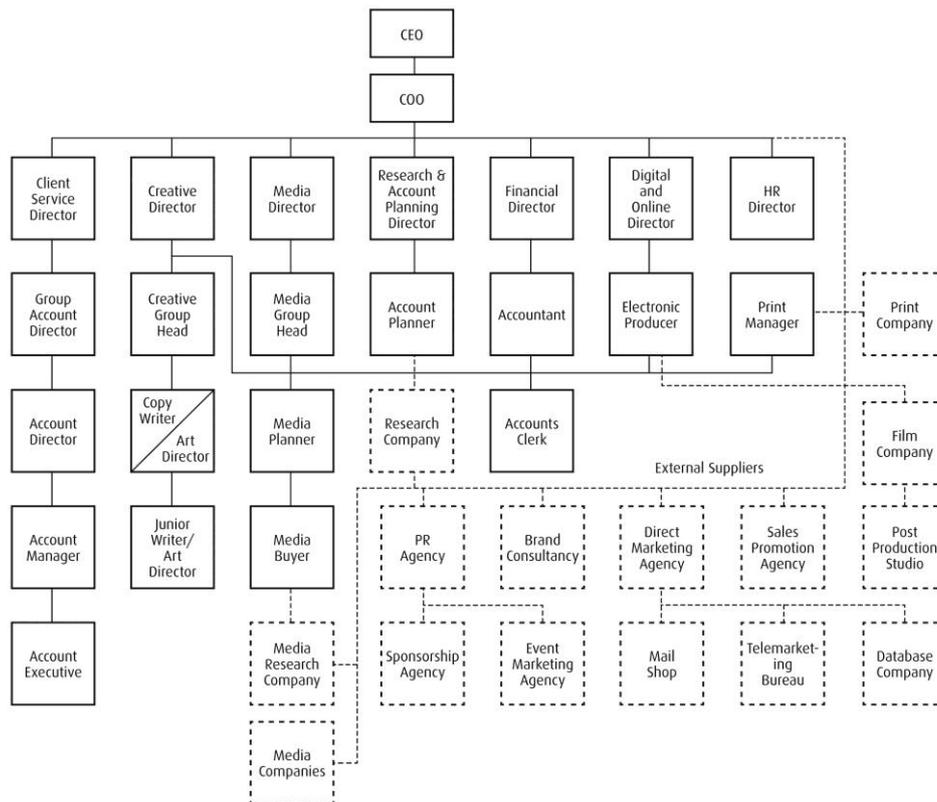
Account planning first appeared as a separate function within the advertising agency in 1968 (Griffiths, 2008). It was introduced by two London-based agencies separately and independently of each other; J.Walter Thompson (JWT) and Boase, Massimi and Pollitt (BMP). Both Stephen King of JWT and Stanley Pollitt of BMP had been considering the notion of separate account planners since about 1965 (Bartle, 1985; Best, 2010; Griffiths, 2008; King, 2008; Pollitt, 2008; Treasure 2007; White, 2008).

Account planning spread to the United States in the early 1980s and has since been adopted by advertising agencies in Argentina, Australia, Belgium, Brazil, Canada, Chile, China, France, Hong Kong, India, New Zealand, Scandinavia, South Africa, Spain, Sweden, and Thailand (Baskin & Picton, 2003; Morrison & Haley, 2003; Patwardhan, Patwardhan & Vasavada-Oza, 2011; Haley, Taylor & Morrison, 2014).

According to Justin Mowday, CEO of DDB New Zealand (2015), and James Mok, Asia Pacific Executive Creative Director of FCB (2015), Strategic Planning Departments were first established in New Zealand by Saatchi and Saatchi at their Auckland and Wellington offices in the mid-1990s.

Figure 2.13 depicts a typical full-service agency organisation structure relating to the New Zealand advertising industry. In New Zealand planners are structurally independent of account service, creative and media personnel within the agency organisation but frequently interact with each of these disciplines individually or inclusively, as the need arises, throughout the creative process.

Figure 2.13: New Zealand Full Service Advertising Agency Structure (and Suppliers)



Source: Developed for this research

Account planning was conceived as a way for advertising agencies to create and maintain meaningful relationships with consumers. Steel (1998) writes: “The planners’ role (is) basically to embrace consumers as partners in the process of developing advertising, to use their input at every stage of the process to inform and sometimes even inspire creative ideas, and to guide and validate the resulting advertising campaigns” (p. xv).

Account planning exists for the sole purpose of creating advertising that effectively connects with consumers. In every sense it is a co-creative process between the planner and the consumer where the only acceptable outcome is relevant, engaging, authentic communication between the brand and its target audience (Fortini-Campbell, 2001).

Steel (1998) contends that: “The best and most effective advertising is that which sets out to involve consumers both in its communication and in the process of developing its message” (p. xiii). He cites advertising legend Bill Bernbach who in a speech to the American Association of Advertising Agents in 1980 stated:

At the heart of an effective creative philosophy is the belief that nothing is so powerful as an insight into human nature, what compulsions drive a man, what instincts dominate his action, even though his language so often camouflages what really motivates him. For if you know these things about a man you can touch him at the core of his being (Steel, 1998, p. xiii).

Table 2.6: The Role of the Account Planner

Fortini- Campbell (2001)	Baskin (2001)	Morrison & Haley (2003)
<ul style="list-style-type: none"> • An insight manager • Discovers and defines the advertising task • Prepares the creative brief • Represents the consumers' point-of-view during the creation of the advertising • Presents the advertising to the client • Tracks the advertising's performance 	<ul style="list-style-type: none"> • Market-researcher • Data analyst • Qualitative focus group moderator • Information centre • Bad cop (to account management's good cop) • New product development consultant • Brainstorming facilitator • Target audience representative/voice of the consumer • Soothsayer/futurologist • Media/communications planner • Strategic thinker/strategy developer • Writer of the creative brief • Think piece polemicist • Social anthropologist • Insight miner • Knowledge applicator 	<ul style="list-style-type: none"> • Research design in advance of the creative brief • Primary data collection in advance of the creative brief • Primary data analysis in advance of the creative brief • Secondary data collection in advance of the creative brief • Secondary data analysis in advance of the creative brief • Writing the creative brief • Production of the creative brief for presentations • Presenting the creative brief to the creative department • Presenting the creative brief to the account team • Presenting the creative brief to the client

Source: Adapted from Baskin (2001), Fortini-Campbell (2001) and Morrison & Haley (2003).

Fortini-Campbell (2001) suggests that the Account Planner is primarily an insight manager, who first accumulates and analyses consumer and market information, distils the insights, and then communicates those insights to the rest of the agency team; usually in the form of the creative brief (refer to Table 2.6). Fortini-Campbell (2001, pp. 182-

186) proposes five base roles that a planner must fulfil during each stage of a campaign's development:

1. Discovering and defining the advertising/marketing communication task

The Account Planner has the job of organizing information about the consumer from every possible source, starting with existing client and agency data. This task also includes reviewing relevant secondary data and undertaking or commissioning primary research.

2. Preparing the creative brief

The Account Planner prepares the creative brief. This brief presents key insights to the Creative Department, the client and to account management. These insights into the consumer and the brand need to inspire the creative team to conceptualize innovative and effective marketing communications that resonate with the target audience.

3. Creative development

As the consumers' advocate the Account Planner represents the consumers' point-of-view within the agency during the creation of the marketing communications. At times the planner will get consumer reaction to early communication concepts. This input is usually based on qualitative research.

4. Presenting the advertising/marketing communication to the client

The Account Planner can help sell the marketing communication concepts to the client by explaining exactly how they work with the consumer. The planner represents the consumer's point of view during the presentation to the client (i.e. "Here's how and why the consumer will react to this communication") and this can reassure the client concerning decisions made in the creative process.

5. Tracking the advertising/marketing communication's performance

Through their follow-up research, account planners track reaction to the marketing communication in the marketplace and provide additional information to the creative and account groups on the ongoing relationship between the brand and the consumer. This input is important for subsequent executions and extensions of the campaign.

Baskin (2001) lists sixteen different roles and functions of the ideal planner (refer to Table 2.6). However Crosier, Grant and Gilmore (2003) suggest that it would be a rare individual who could fulfil these roles single-handedly and repeatedly.

It is the implications of such a 'super-planner' role that led Butcher and McCulloch (2003) to suggest that the "the job description for account planners may have become fanciful" (p. 475). The expectations of the planner's role "probably exceed the individual's capacity to deliver on that role" (p. 473).

Being a good Account Planner requires a certain set of skills and attributes. Fortini-Campbell (2001) suggests that these include:

Intelligence, experience, strong observational skills and, most of all, judgement... Interpersonal skills are important... Planners foster collaboration among all members of the agency team and between the agency and the client...An Account Planner must be good at developing, maintaining and communicating his or her own point of view, that is, the consumer's point of view... Finally, a good planner must be someone who is passionate about advertising (pp. 193-194).

Baskin (2001) adds: "Has an understanding of brands" (p. 9).

Haley, Taylor and Morrison (2014) (as a result of interviews conducted with advertising agency creatives in New York and Chicago regarding their perception of the account planning process) identified a set of personality factors and a set of functional factors that should lead to excellent planning outcomes. According to these advertising creatives effective planners are "articulate, smart, open-minded, curious (who) think like a creative (but) speak like an account person. (They are) respectful of the talents of others, skilled interpersonally, and inspiring" (pp. 173-174). In addition, creatives felt that excellent planning depended on the proper use of planners in the advertising process - ideally as the third member and equal partner of a creative team of copywriter and designer: "A solid strategic partnership based on trust and respect where each team member contributes but also understands the boundaries of each other's roles" (p. 179). Creatives saw effective planners as the 'voice of the brand' within the agency. "They must interpret culture to generate insights that will ignite successful communications... (They must) get you in touch with that human insight about the brand" (pp. 175-176).

A fundamental role of the Account Planner is to find insights into problems that lead to their solution.

A true insight into consumer behaviour will connect with the consumer at an emotional level. It will provoke a clear response such as ‘that is exactly how I feel’, or ‘this brand really understands me’, or ‘I’ve never thought about it that way’ (Kelley & Jugenheimer, 2011, p. 66).

When a connection is made with the consumer in this way it can effect a change in consumer behaviour that benefits the brand. Account planners seeking insights must look at things differently and see things intuitively. They must look at relationships in a new and unique way. Ultimately they must be able to link an insight about the consumer with an insight about the brand that will resolve the consumer’s problem (Kelley & Jugenheimer, 2011).

Account planning involves identifying a desired consumer response and doing the necessary research to ensure that that is what the advertising delivers (White, 2008). When it first appeared in 1968 it was a revolutionary concept. It was the first time the advertising industry had taken the marketing concept on board by focusing on the views and needs of consumers. Account planners are brand strategists; their role is essentially strategic. There is “a symbiotic relationship between planners and creative that dictates an almost single-minded concentration on ‘the brief’” (White, 2008, p. 22). The creative brief is an area for negotiation and interplay between planners and creatives.

White (2008) contends that the role of the planner is changing. As the media and consumer landscapes have changed, driven by the arrival of new technologies, the nature of the interaction between businesses and their customers has also changed. The explosion of both new and old media channels has required a better understanding of channel choices and has led to demands for media neutral planning. Creative agencies are now required to come up with a ‘big idea’ that can drive the brand strategically across all forms of communication, both internally to employees, and externally to consumers and other stakeholders. This has put new demands on planners. According to White (2008) there has been a general failure by much of the advertising industry to respond adequately to the need for integrated marketing communication. He suggests that agencies are often intimidated by the concept and its operational complexity and lack real understanding of what is required. White (2008) suspects that the future of planning may lie in the context of specialised consultancies rather than in the context of creative agencies - but he believes that there will always be “a role for people to advise brand owners on how best

to communicate with their potential or actual customers, on the basis of a broadly rooted understanding of consumers and how they think, feel and behave” (p. 23).

Griffiths (2008) observes that from its origins in advertising agencies planning can now be found in every type of communication agency. He notes that there are even planning departments in client organisations. According to Griffiths (2008) one of planning’s most important contributions to marketers has been to ensure that every creative brief asks the question: ‘What is the communication going to do for the brand?’ Other major contributions include “the classic requirement to distil the message into a proposition, to define the advertising strategy and to evaluate the effectiveness of the advertising concept and creative idea at delivering the advertising strategy and core message” (p. 25).

Griffiths (2008) also notes that with the advent of the Internet, mobile marketing and event marketing there are now planners who describe themselves as interactive or behavioural planners, able to measure interactive behaviour with increased sophistication and in great detail. For interactive planners the brand is experienced through behaviour; messaging is secondary. It is becoming increasingly important, Griffiths (2008) suggests, for marketers to create and manage brand experiences for their customers and it is here that interactive planners are playing an increasingly strategic role. This view is developed by Clemmow (2010) who contends that smart agencies understand that:

Advertising works by unleashing the power of participation at all brand touch points, almost certainly these days putting digital at the heart of the communication... But participative communication is only of value if it builds on the big idea behind the brand and advances consumers’ relationship with it. It must be ‘integral’ participation (p. 28).

In summary, the advertising Account Planner plays a critically strategic role in the advertising and IMC creative process today. The product that the Account Planner produces is the creative brief; the basis for all message content produced by the creative team. The Account Planner represents the consumer’s point of view in the marketing and advertising process; they immerse themselves in the consumer’s mindset at every phase of the brand purchase cycle. Turning information into insights about consumers is the essence of the Account Planner’s role. They must be able to advocate the consumer’s viewpoint at every stage of a brand’s communication strategy - right through to the completion of the creative product. By keeping the consumer at the centre of the marketing and communications process the Account Planner impacts all aspects of that

process. Needless to say, the Account Planner is arguably the most important player in the development of integrated marketing communication campaigns (Kelley & Jugenheimer, 2011).

The planner needs to intimately understand the client's brand and to ensure that the agency's creative strategy and execution of a big idea are consistent with the brand and appropriate for the target audience (Baskin, 2001). The role of the Account Planner in IMC planning is to help the agency team gain insight into the target audience and to identify what brand touch points are most relevant and meaningful to the target audience - where they are most open to receiving a brand message (Kelley & Jugenheimer, 2011).

As previously mentioned, account planners are the main authors of the agency creative brief. The next section will discuss the important role of the creative brief.

2.3.11.3 The Role of the Creative Brief

The assertion has been made that the creative brief is the most important piece of paper that circulates within agencies (Butterfield, 1985). This thesis concurs with that statement. The creative brief is where the consumer insight and the brand insight meet. It is the distillation of the client's business problem, the communication objectives and the brand value proposition into a succinct format designed to illuminate and inspire the creative team. It is the springboard that launches the creative 'big idea'. It is the basis upon which IMC campaigns are built.

Advertising agencies are in the business of applied creativity; they have a company-wide responsibility to find creative solutions to business problems. They are all about the conception, execution and management of ideas that are creative, effective and fast (speed to market being a source of competitive advantage). The idea is king; not one department or another (Clemmow, 2010, p. 29).

The strategic planning process varies from agency to agency and even from planner to planner within an agency. A typical account planning cycle starts with the receipt of the brief from the client. Ideally the agency should have as full access as possible to client data and should be fully briefed by the client concerning this data (Reeve, 1992).

According to the Account Planning Group there are three stages in the planning cycle: "strategy development, creative development and the post-campaign stage" (Reeve, 1992; p. 271).

It has been suggested by Wolfe (1994) that planners act as matchmakers between the brand and the consumer. This is also the essence of Fortini-Campbell's (2001) treatise on planning entitled 'Hitting the Sweet Spot'. Fortini-Campbell (2001) writes:

You have to find the insight into your consumer and you have to find an insight into your brand. Then you have to bring those two insights together and, as I like to call it, hit the Sweet Spot. When you make that connection, good things happen. It's greater than the sum of its parts (p. vii).

This process happens via the creative brief.

Morrison and Haley (2003) observe that "a large amount of a planner's time is spent doing research in advance of the brief and also producing the brief" (p. 126). Morrison and Haley (2003) operationalize developing the creative brief into the following ten tasks: research design in advance of the creative brief; primary data collection in advance of the creative brief; primary data analysis in advance of the creative brief; secondary data collection in advance of the creative brief; secondary data analysis in advance of the creative brief; writing the creative brief; production of the creative brief for presentations; presenting the creative brief to the creative department; presenting the creative brief to the account team and, finally, presenting the creative brief to the client (refer to Table 2.6).

Table 2.7 lists the steps in the preparation of the creative brief considered typical by Moriarty, Mitchell and Wells (2009) (refer also to Baskin, 2001; Belch et al. 2009; Butterfield, 1985; Eagle et al. 2015; Fortini-Campbell, 2001; Kitchen, 1999).

Table 2.7: Steps in Preparing the Creative Brief

Aspect	Brief Description
• Client Brief	The start of the account planning process.
• Problem	A precise description of the problem that the communication needs to solve
• Target Audience	An in-depth description of the people to whom the communication is designed to influence
• Consumer Insights	The exploration and understanding of consumers' relationships with the brand
• Brand Insights and Imperatives	An insight about the brand itself, drawn from the brand identity statement, that will link with the consumer insight
• Communication Objectives	The end result that the communication is seeking to achieve
• The Proposition	The key selling idea that will engage the target audience and persuade them to act
• Support for the Proposition	Reasons why the consumer should believe the proposition
• Tone-of-Voice	How to best say what needs to be said. The tone of the conversation
• Media Imperatives	Choosing the right media or medium to engage the target audience
• Mandatory Requirements	Legal restrictions; client requirements; timing and budget

Source: Adapted from Moriarty, Mitchell & Wells (2009) pp. 214-215

The creative brief is the end of the strategic process (Cooper, 2000). This strategic document is also called a communication brief. The steps identified in Table 2.7, following receipt of the client brief, are as follows:

First, what is the problem? A good brief must state clearly what the problem is that the communication needs to solve. For example, what attitudinal or behavioural change does the communication need to effect?

Second, who is the target audience? To whom is the communication designed to influence? This is not just a definition of current customer profiles (of brand loyalists, heavy users, infrequent users) but should also include the competition's users and non-users who represent potential users of the brand. Butterfield (1985) suggests in this regard that although demographic descriptors may be useful in defining the target audience there needs to be:

A qualitative feel as to how and why this target audience is appropriate, what triggers their behaviour.... what other things these people do or buy, what their interests are, what role our brand might fill in their lives, what their feelings about our current communications are (p. 42).

Third, what consumer insights have been gained? This is the essence of the Account Planner's job and perhaps the most difficult. As Fortini-Campbell (2001) writes:

The key to connecting with consumers is being able to put yourself in their shoes. You need to know how to think the way they think, and feel the way they feel. You have to know what's important to them, what makes them happy, and what they worry about. In other words, you have to learn how to get inside their skin and see the world through their eyes (p. 47).

Fortini-Campbell (2001) suggests that the secret to discerning successful consumer insights is for the planner to immerse themselves in the world of the people they are marketing to. This is akin to an actor taking on the personality of the character he or she is to play. In practical terms this means that the planner needs to "get out with them, into the places they live, work, shop and play" (Fortini-Campbell, 2001, p. 50).

Butterfield (1985) observes that:

Exploring and understanding consumers' relationships with brands is probably the most time-consuming, but most rewarding part of the whole strategic development process. And because it is by definition different for each and every brand analysed, it is also the hardest part of the process to be prescriptive about (p. 42).

In this process, Butterfield (1985) argues, the planner needs to constantly keep in mind the big question that needs answering: 'Why do people who buy this brand do so?' or 'Why do those who don't, not?'

Fourth, what are the brand insights and brand imperatives? Hackley (2003) recalls a comment by a Senior Account Planner in a New York agency when discussing how the concept of account planning has changed since its inception: "When it started everybody talked about us being the voice of the consumer and now the emphasis really is on brands and branding and maintaining brand value" (p. 238). This is what Fortini-Campbell (2001) refers to as the brand insight: "Hopefully, the brief will provide a distinctive insight into the brand that could be no one else's. A good consumer insight will link an insight about the consumer with an insight about the brand" (p. 191).

The brand insight could be determined from the physical aspects of the product or related to the brand's unique personality or image. Needless to say it requires of the planner a

comprehensive understanding of the brand's identity (Aaker, 1996, 2014; Aaker & Joachimsthaler, 2000). (In Chapter 4 and Chapter 5 this thesis will examine the extent to which the brand identity statement is integrated into the creative brief or stands alone as a supplementary appendix to the creative brief).

Fifth, what are the communication objectives? An objective is the goal or aim or end result that the communication is seeking to achieve. 'What do we want customers or prospects to do in response to our messages?' Advertising (as opposed to marketing) objectives fall into a number of categories: "creating awareness, trial, informing or educating, changing attitudes, reminding, addressing image or identity, or conveying a specific message" (Butterfield, 1985, p. 46). Communication objectives define what needs to be done - the way forward; they determine the tasks that follow, and provide a benchmark to measure the success of a campaign (Belch et al. 2009).

Sixth, what is the proposition or selling idea? What is the single thought or idea that the communication will bring to light in a provocative way? What is the single most important point to be communicated about the brand? This is the "key message/proposition/stimulus/benefit/idea that you believe will engage the audience and persuade them/make this happen" (Baskin, 2001, p. 237). The proposition needs to be written succinctly. Ideally it should be a one-line-portable-take-away thought (Creatives appreciate the freedom of a tight brief!)

Seventh, how can this proposition or selling idea be supported? Why should the consumer believe the proposition? There should be some tangible or fact-based reasons that allow the consumer to rationalize (to themselves or others) what is often an emotionally driven brand purchase decision. The brand benefit should be compelling and indisputable.

Eighth, what should be the creative direction? (often called 'tone-of-voice'). How can what needs to be said, be said best? The communication needs to be consistent with the brand's character, positioning, values and personality - and the advertising is a conversation with the audience. People will often respond positively to warm, emotional, charming and witty conversations. On other occasions energetic or unconventional conversations may be more appropriate.

Ninth, are there any media imperatives? Choosing the right media or medium to engage the target audience is fundamental to successful marketing communications. Media

consumption varies by age, gender, social class, stage of life, geography, ethnicity and culture. The medium must provide a connective effect between the target audience and the message. The medium and the message must be compatible.

Finally, what are the mandatory requirements that need to be considered? This includes practical considerations such as legal restrictions on advertising claims and mandatory client requirements such as logos, dealer names, address details, timing and budget.

The creative brief is intended to make the process of developing brand communications more efficient and effective (Baskin, 2001). It is strategic but should also be inspirational. A good brief serves as a springboard for the creative team to create great marketing communications. “It is designed to ignite the creative team and give a spark to their idea process” (Moriarty et al. 2009).

Moriarty et al. (2009, p. 215) assert that IMC planning follows the same basic process as advertising planning with the difference being:

The scope of the plan and the variety of marketing communication areas involved in the effort. The more tools used, the harder it is to coordinate their efforts in maintaining consistency across a variety of messages... Effective IMC plans lead to profitable long-term brand relationships. The emphasis on brand building is one reason account planning is moving beyond advertising and being used in IMC campaign planning.

Moriarty et al. (2009) suggest that there are three main areas where IMC planning differs from advertising planning:

First, the target market in an IMC plan includes *all* stakeholders, not just consumers. This includes corporate level stakeholders (employees, investors, government bodies and agencies, business partners, etc.); marketing level stakeholders (consumers, customers, distributors, retailers, suppliers, competitors, etc.); and marketing communications level stakeholders (target audiences, employees, the trade, the general public, etc.) These audiences include all those who might influence the purchase of products and the success of a company’s marketing program. It is imperative that there is a core level of consistency in all messages.

Second, IMC programmes are designed to maximise positive brand experiences for every person at every touch point (or point of contact) that they have with a brand. Everything a brand does or doesn’t do delivers a message.

Third, an IMC plan has a set of interrelated objectives with specific strategies for the various forms of marketing communication tools used. For example, there are different communication objectives when using public relations (e.g. announcing news), sales promotions (e.g. generating immediate sales), direct marketing (e.g. personalising sales messages), and sponsorship (e.g. building goodwill for the brand), etc.

The ultimate concern for the IMC planner, according to Moriarty et al. (2009), is the creation of consistent messages through multiple media at many different contact points. This message synergy is designed to maximise brand impact. Because synergy is an organisational problem it calls for cross functional planning; everyone within an organisation ‘singing from the same song sheet’ (Piercy, 2012). As discussed in Section 2.3.4: strategic organisational (vertical) integration facilitating and reinforcing the tactical (horizontal) integration of all branded communications.

This section has discussed the role of the creative advertising agency in the IMC process. By way of back-grounding the research in this thesis a review has been made of all previous research relating to the evolution of the understanding and implementation of the IMC concept in New Zealand by New Zealand advertising agency executives and their clients. Current best practice suggests that the role of creative advertising agencies in this process is a symbiotic relationship with the client organisation. Although the agency role is necessarily tactical (or horizontal) in regard to the implementation of IMC, this thesis proposes that all marketer-initiated marketing communication must be vertically integrated as well - by referring to and adhering to the client organisation’s corporate brand identity (as well as to the product brand identity). The role of the Account Planner is strategic in this process. This role too is symbiotic in its relationship with the client and agency client service and creative executives. The Account Planner must intimately understand the client’s brand as well as the target audience consumer; the planner is tasked with linking a consumer insight to a brand insight and presenting these in the form of a creative brief.

It is the intention of this research to determine the extent to which a brand identity statement is integrated into the creative brief by the Account Planner, appended to it, or ignored by the planner. As has been noted, the account planning process is committed to a dialogue with the consumer as a basis for making a brand response. It is this researcher’s opinion that this epitomises the IMC call for an “audience-driven business

process” (Kliatchko, 2008. p. 140) - an embodiment of the core IMC principle of ‘outside-in planning’, where the process starts outside of the company and builds backwards towards the brand (Schultz & Schultz, 2004).

2.3.12 IMC: Measurement and Evaluation of Effectiveness

Much of the IMC field research conducted to date (particularly in the New Zealand context) alludes to difficulties in evaluating the effectiveness of IMC campaigns. It is therefore appropriate now to review a number of comments made by researchers on this issue.

The measurement of integration and synergy has to date proved difficult (Assael, 2011; Moriarty & Schultz, 2012; Schultz, 2010) while the measurement and evaluation of the effectiveness of IMC campaigns has also been a challenge (Duncan, 2005; Duncan & Moriarty, 1997; Eagle & Kitchen, 2000, 2004; Eagle et al. 1999, 2007; Kitchen & Schultz, 1997,1999; Schultz & Kitchen, 1997).

The measurement of advertising effectiveness has traditionally involved metrics relating to changes in target audience awareness, attitude and behaviour (Tellis, 2004). Some writers believe that the use of sales as a measure of effectiveness can only be used when the purpose of the marketing communications is to initiate immediate action, as is typically the case with direct response advertising, sales promotion and direct mail (Kerr, 2003). The measurement of advertising ROI and long-term effectiveness has been difficult to ascertain and the increasing interest in brand valuation as a strategic management tool has been a response to this challenge (Seddon, 2010). Marketing communication metrics are frequently applied to the measurement of IMC campaigns.

Eagle et al. (2015) comment that “in economically strident times, it becomes increasingly imperative that organisations employ their resources as prudently as possible to ensure that they get the maximum return for every penny spent” (p. 367). The analysis of the effectiveness of an IMC campaign is generally based upon the achievement of a range of objectives for that campaign - such as, for example, ‘improved brand recognition’ or ‘improved attitude toward the brand’ or ‘a positive change in a desired behaviour’. However, the measurement of the long-term effects of an IMC campaign in terms of intangibles such as ‘increasing brand equity’ are more difficult to quantify.

Eagle et al. (2015) suggest that there are three key factors that make it difficult to measure IMC effectiveness and return on investment (ROI): first, the difficulty of isolating the contribution of a single factor in (for example) the increase in shareholder value; second, the impact of ‘multiple synergies’ in the process. i.e. The recognition that marketing communications do not exist in isolation but may contribute to the increase in shareholder value in tandem with other departments in an organisation. Similarly, the ability to isolate the incremental impact of a single brand message can prove to be extremely difficult, if not impossible; third, the effect of competitor activity. i.e. “Any activity that has the potential to draw attention away from an organisation’s marketing efforts” (p. 376).

The Duncan-Moriarty IM mini-audit (Duncan & Moriarty, 1997) was developed as a diagnostic tool to help determine what areas companies need to focus on to become more integrated. Reid (2005) employed a modified version of the audit to examine the relationship between the IMC process and brand outcomes. Results demonstrated a significant and positive relationship between the implementation of the IMC process and brand outcomes. Zabkar et al. (2013) also utilised Duncan and Moriarty’s mini-audit to measure management involvement in the IMC decision-making process, the subsequent level of marketing communication integration and the consequent business performance in terms of a company’s market share and profitability. Their findings (based on qualitative and quantitative research among managers from large and medium-size companies) concluded that management involvement positively influenced the level of marketing communication integration, resulting in better business performance. The level of marketing communication integration was measured in line with Duncan and Moriarty’s 1997 model with dimensions of interactivity, strategic consistency, organisational infrastructure, mission communications and planning and evaluation. The level of marketing communication integration was measured as an aggregated response over all dimensions. Business performance was based on two separate constructs: market performance and financial performance. Market performance was measured through reported sales performance and market share; financial performance was measured with reported profit, profitability and ROI metrics (Zabkar et al. 2013).

Luxton (2008) contends that “one of the critical issues in IMC research is a relationship between the level of IMC attained by an organisation and the degree to which that might influence performance outcomes such as campaign, brand and financial”(p. 85). Luxton suggests that a number of options exist in terms of specifically measuring ‘brand

performance' as a measure of IMC effectiveness. These include: (1) Financial value (Feldwick, 1996); (2) Brand equity (Aaker, 1996); (3) Brand report card (Keller, 2000), or (4) The brand building process (de Chernatony, 2001). Luxton's (2008) research found that IMC (along with two other independent constructs - considered antecedent to IMC - Market Orientation and Brand Orientation) had a direct and positive association with brand performance, which in turn had a direct and positive association with financial performance. Luxton concludes that IMC supports the development of the brand as a valuable market-based asset.

It is Kitchen's 2010 view that a current major stumbling block to IMC continues to be its marked inability to measure or evaluate outcomes. While the pursuit of this goal may be considered akin to the search for the Holy Grail of IMC, nonetheless Kitchen contends that "the technology, skills, models, and embryonic tools are available to move evaluation to the forefront and indeed forerunner in terms of IMC progression" (p. 7). Kitchen suggests that in the 'crucible of practice' (in the marketplace) IMC is undergoing change to become 'integrated *brand marketing*' - and evaluating brand marketing is a significant step forward in strengthening the theoretical framework of this process. Luxton (2008) would concur with that view.

In concluding this section it is relevant to review Schultz's insights into marketing communication measurement in what he calls 'a transformational marketplace'. Schultz (2010) contends that recent marketplace changes such as the explosion of digital technology and the advent of global interlocking business practices have necessitated the need for marketers and their agencies to change their business processes to meet these new challenges. In the new 'push and pull marketplace' there is a need to focus on and measure consumer brand media consumption behaviour: "Consumers have developed a plethora of alternatives to block and avoid 'pushed out' messages" (p. 62). Consumers can now control the marketer's access to them and their lives and have the ability, if they wish, to access only those media forms that they prefer, when they need them. The challenge then to the brand marketer is "not to identify which media forms are the most efficient for brand message delivery, but which media forms are accessed by consumers. That means which media most effectively communicates with consumers" (p. 63). Schultz suggests that the key challenge is not just to identify which media form or forms the consumer accesses but to identify how much time is spent with each media form and, finally, to monitor whether the media form is the primary form being processed by the

consumer or just in the background. Schultz further suggests that if consumers personally access the media form the likelihood of media ‘involvement’ rather than simple ‘message exposure’ is substantially enhanced.

In addition, insights into what combination of media consumers are exposed to or access (defined as simultaneous media usage or ‘SIMM’) is a key to effective brand communications planning today. SIMM studies are relatively new to media research but are now an essential prerequisite if marketers are to understand today’s changing media marketplace. Schultz concludes by observing that media consumption is a critical variable for brand marketers going forward. He notes that there is increasingly solid evidence that better consumer-focused allocation of marketing communication funds will likely result in better returns on investment for the marketer (Schultz, 2010).

2.4 Chapter Summary and Conclusions

Given that a major focus of this research is the implementation of IMC by advertising agencies it is inevitable that the tenor of much of the discussion from the field research will relate to the tactical (or horizontal) integration of IMC. However the above review of the literature suggests that marketing communication that involves tactical integration without vertical integration does not comply with today’s understanding of IMC best practice. To this end insights from the field research into the interface of the corporate brand identity concept with the product brand identity concept will be examined. In addition the relationship of these two concepts to the effective implementation of the strategic as well as the tactical integration of brand communications will also be examined. Finally, the role of the Account Planner and the creative brief in effecting this process will be investigated.

This concludes the literature review. Chapter 3 of this thesis will present a detailed discussion of the field research undertaken. It will present the research questions that guide the research. It will detail the research plan, the research process, the research methodology and the strategies employed for data analysis. But first of all the philosophical assumptions underlying the research will be discussed.

Chapter 3: Research Methodology

Figure 3.1: Structure of Chapter Three

Section	Topic
3.1	Introduction
3.2	Research Purpose
3.3	Research Approach
3.4	Methodology: Case Study Research
3.5	Research Design
3.6	Ethical Issues
3.7	Validity and Reliability
3.8	Chapter Summary and Conclusions

3.1 Introduction

In Chapter 2 a review of the literature identified some important gaps in our understanding of how IMC is implemented in the marketplace. Research has tended to ignore the potential role of the brand identity construct in this process and the strategic role that advertising agency account planners may play in the process. The integration of an organisation's corporate brand identity with product brand identities by way of a brand manifesto statement has yet to be examined. While much attention has been focused on the need for cross-functional strategic integration at the corporate organisational level (Kerr & Patti, 2013; Porcu et al. 2012) - as a necessary prerequisite for tactical integration at the marketing communication level - much less attention has been afforded to Schultz's 1998 insight that "the brand is the integrating factor around which all marketing and communication should be built" (p. 8) - and his 2001 assertion that:

The corporate brand, in addition to being the core of the branding process from which product brands often generate their value, also provides the necessary integration elements that bring and hold the organisation together. This includes everyone from employees to suppliers and vendors to, ultimately, shareholders and owners (p. 7).

Chapter 3 presents a research strategy to address these issues.

The role of the Account Planner has emerged relatively recently in New Zealand (the mid-1990s), and the part these executives play in the development and integration of the brand identity concept into the creative brief has not been addressed in any research to date. Similarly, the extent to which account planners use the brand identity concept in implementing an IMC strategy has not yet been researched, and the same can be said in regard to what elements are included in any brand identity statement utilised by advertising agencies. Exploring these issues lies at the heart of this research.

Chapter 3 begins by discussing the research purpose (Section 3.2); the reasons for the study, the research problem, and the research questions. It then discusses the research approach (Section 3.3), identifying the philosophical assumptions that the researcher makes in the research process. A theoretical perspective is acknowledged and the research methodology and research methods are presented. A multiple case study is at the heart of the research (Section 3.4). The research design, methods of data collection and analysis are examined (Section 3.5); issues relating to ethics (Section 3.6), validity and reliability (Section 3.7) are discussed. Finally, conclusions are presented (Section 3.8).

3.2 Research Purpose

3.2.1 Reason for the Study

There is little empirical research that investigates the role of the brand identity construct in the process of creating IMC (Luxton, 2008).

There are a significant number of empirical studies that interview or survey advertising agency personnel concerning the creative process (e.g; Kilgour, 2006; Koslow et al. 2003; Kover & Goldberg, 1995; Morais, 2007) or the account planning process (eg; Butcher & McCulloch, 2003; Crosier et al. 2003; Hackley, 2003) but there are no empirical studies that explore the potential role of the Account Planner in utilising the brand identity concept in the process of implementing IMC.

As discussed in Chapter 2.3.11.1 there have been a number of studies of senior advertising agency executives (and their clients) in New Zealand, seeking to ascertain the levels of understanding, implementation and usage of IMC in the promotion of client brands (Eagle et al. 1999; Eagle & Kitchen, 2000; 2004; Eagle et al. 2007; Kitchen & Schultz, 1999). None of these studies investigate the role of the brand identity construct in the implementation of IMC or the role of the Account Planner in that process.

However, a significant comment reported by Eagle and Kitchen (2000) is relevant to this research. In their paper they report that agency respondents identified IMC as “an effective means of achieving consistency in brand communications” (p. 675) and that success in achieving this goal related to the development of “*brand blueprints* - key guidelines and principles” (p. 676) - that are fundamentally important to the process of building brands. The ‘brand blueprint’ concept lies at the heart of this thesis (de Chernatony, 2010). It is another term for a brand identity statement. A brand blueprint or brand identity statement has the potential to play a significant role in the implementation of IMC - at both a tactical and a strategic level. Although considered important by practitioners since at least 2000 (Eagle & Kitchen, 2000) it has been largely overlooked by scholars until this study. The research problem for this research is to determine what role, if any, the brand identity statement currently plays in the implementation of IMC by New Zealand advertising agencies on behalf of their clients.

Duncan and Mulhern (2004, p. 26) conclude that:

IMC brings a certain discipline to an organisation. The base or core of IMC’s discipline is the brand. The ultimate benefit of using IMC is making a brand stronger, and therefore, increasing brand equity. Operationally this means:

1. A brand focus should precede any communication execution.
2. Because everything a company does, and sometimes what it doesn’t do, can send a powerful brand message, integration of brand communication should encompass the entire organisation.
3. Because brands express customer and stakeholder relationships, brand communications need to be a dialogue, not a monologue.
4. Brands are organic which means they must be nourished and cared for (i.e. managed) if they are to stay healthy and grow.
5. Managing brands is driven by measurable objectives and a focus on achieving those objectives.

This research investigates Duncan and Mulhern’s conclusion that a brand focus is an essential prerequisite to the successful implementation of IMC. To this end seeking to understand the role of the brand identity construct in the implementation of IMC is both a worthy ambition and a strategic imperative; and is both timely and appropriate.

3.2.2 Research Problem

This study seeks to explore the role of the brand identity construct in the implementation of IMC by New Zealand advertising agencies. In Chapter 1 the research problem was presented as follows:

What is the role of the brand identity construct in the implementation of IMC by New Zealand advertising agencies?

The research focuses primarily on the role played by advertising agencies in the process of creating IMC for their clients' brands and it focuses specifically on the strategic role played by agency account planners in this process. It seeks to investigate whether or not account planners use some form of brand identity statement when preparing a creative brief to guide and inspire the creative team and it examines both the tactical and strategic functions of brand identity statements in the formulation of IMC campaigns.

Advertising agencies have traditionally played a primary role in the creation of IMC campaigns for their clients' brands (Schultz, 1993; Duncan & Mulhern, 2004). In the IMC literature this is commonly referred to as 'tactical integration', 'horizontal integration', 'operational integration', or 'message integration' (Kerr, 2003; Kliatchko, 2008). Although tactical integration is considered by scholars to be the most basic step in the IMC process it is still an important part of that process (Duncan & Everett, 1993). Without it there would be no IMC. However tactical integration is often dismissed as the simple coordination of communication tools to 'speak with one voice' (Kerr, 2003). Petrisson & Wang (1996) define tactical integration as "typically achieved by using the same benefit, tone, characters, theme-line, logo or other executional elements in all consumer communications" (p. 154). On the other hand the defining and differentiating characteristic of IMC - what makes IMC new and different - is 'strategic integration' (Duncan & Everett, 1993; Eagle et al. 1999). Strategic integration is initiated at the corporate level of an organisation (Kliatchko, 2008). It is also known as planning integration (Kerr, 2003). Senior management determine corporate goals and objectives and corporate brand building strategies. They take responsibility for the task of integrating all the functional units within an organisation. They address organisational structure, systems, relationships and management. Unless these facets are integrated it is unlikely that IMC can be fully achieved (Pickton & Hartley, 1998). Senior management must view integrated marketing communications as a strategic investment that generates long-term business results (Kliatchko, 2008).

The interplay and integration of strategic and tactical IMC should, ideally, converge in an advertising agency's creative brief for a brand campaign. This research investigates if brand identity statements play an important role in that convergence process.

3.2.3 Research Questions

The research problem focuses on the role of the brand identity statement in the implementation of IMC. It raises the question whether a brand identity statement is an important (even essential) planning tool for agency planners; a tool which has the potential to facilitate the convergence and implementation of the strategic and tactical elements of the brand being promoted. In contemporary advertising agencies, account planners play important strategic roles in the creation of IMC. This research investigates their use of brand identity statements in that process.

Five central research questions guide this inquiry, with four sub-questions. This is within the suggested limits set by Miles and Huberman (1994) and recommended by Creswell (2009):

RQ1: What is the role of the Account Planner in the agency?

RQ2: What is the role of the creative brief in the creative process?

RQ3: What is the role of brands in the creative process?

RQ3.1: To what extent (and how) do account planners use a brand identity statement when formulating IMC strategy?

RQ3.2: What elements (for example: brand name, brand positioning, brand personality, brand values, brand graphics/logo) are included in any brand identity statement employed?

RQ3.3: To what extent is a brand identity statement integrated into the creative brief?

RQ3.4: To what extent does corporate brand identity interact with and infuse product brand identity in brand identity statements used by New Zealand advertising agencies?

RQ4: What are the drivers that integrate marketing communications?

RQ5: To what extent is IMC, as practised by New Zealand advertising agencies, anything more than just ‘tactical integration’?

3.3 Research Approach

“The practice of business research does not exist in a bubble” (Bryman & Bell, 2011, p. 5). A variety of considerations enter into the process of doing business research. These relate to the philosophical assumptions that a researcher makes; the researcher’s world view - or paradigms or sets of belief - that they bring to the research project; and the theoretical framework that researchers use to interpret their study (Creswell, 2007).

Good research requires making these assumptions, paradigms, and frameworks explicit in the writing of a study, and, at a minimum, to be aware that they influence the conduct of inquiry (Creswell, 2007, p. 15).

The nature of the relationship between theory and research is one of these considerations. For example, does theory guide research (known as a deductive approach) or is theory an outcome of research (known as an inductive approach)? (Bryman & Bell, 2011). The next section discusses some of the important assumptions and considerations that researchers bring to their research; issues relating to ontology and epistemology - to the researcher’s methodological perspectives and to the methods chosen to undertake their research. It utilises Crotty’s (1998) ‘Research Framework’ as the basis for discussion (refer to Figure 3.2).

3.3.1 The Research Concept

Ontology is the study of being. It is concerned with the nature of existence (Crotty, 1998). Ontological issues relate to the researcher’s stance toward the nature of reality and its characteristics. What is the researcher’s view of the nature of reality? Is the social world regarded as something external to the social actors or is it something that the actors are in the process of fashioning? (Bryman & Bell, 2011; Creswell, 2007).

Epistemological issues relate to what is regarded as appropriate knowledge about the social world. What is the relationship between the researcher and that being researched? How does the researcher know what he or she knows? (Bryman & Bell, 2011; Creswell, 2007).

Crotty (1998) observes that ontological issues and epistemological issues tend to emerge together (refer to Figure 3.2):

Were we to introduce ontology into our framework ontology would sit alongside epistemology informing the theoretical perspective, for each theoretical perspective

embodies a certain way of understanding *what is* (ontology) as well as a certain way of understanding *what it means to know* (epistemology) (p. 10).

Answers to these questions will determine the researcher's choice of one of two widely used research strategies in the social sciences: quantitative or qualitative research (although a third option, mixed methods research, combining both quantitative and qualitative research is sometimes employed) (Bryman & Bell, 2011).

It is helpful to explore the respective merits of each of the above philosophical concepts in order to understand which research method is best suited to meet the aims of this research and to address the research questions. The following sections will discuss these concepts and proffer a research paradigm that guides the research design. However there is a caveat here. Crotty (1998, p. 1) writes:

Researchers... often express bewilderment at the array of methodologies and methods laid out before their gaze. These methodologies and methods are not usually laid out in a highly organised fashion and may appear more as a maze than as pathways to orderly research... To add to the confusion, the terminology is far from consistent in research literature and social science texts. One frequently finds the same term used in a number of different, sometimes even contradictory, ways.

With this caveat in mind the next section will discuss the research concepts that shape the choice of this research design.

The concepts of ontology, epistemology, and methodology are reviewed below as a basis for understanding and providing a rationale for the choice of the research paradigm.

3.3.1.1 Ontology

How does the researcher view reality? Ontology is concerned with 'what is'; with the structure of reality. Along with epistemology it informs a theoretical perspective. Every theoretical perspective embodies a certain way of understanding 'what is' (ontology) and 'what it means to know' (epistemology). Because these issues tend to merge together in the construction of meaning the concepts are often used interchangeably by writers in the research literature (Crotty, 1998). For example, Crotty (1998) notes that "Realism (an ontological notion asserting that realities exist outside the mind) is often taken to imply objectivism (an epistemological notion asserting that meaning exists in objects independently of any consciousness)" (p. 10). He cites Guber and Lincoln (1994) who identify realism with objectivism, positing a necessary link between the two, as holding this view. Guber and Lincoln (1994) posit that "the posture of the knower must be one of

objective detachment... in order to be able to discover ‘how things really are’ and ‘how things really work’” (p. 108). Crotty (1998) asserts that a large number of scholars would disagree with this position and that these scholars would argue that “the existence of a world without a mind is conceivable (but) meaning without a mind is not. Realism in ontology and constructionism in epistemology turn out to be quite compatible” (pp. 10-11).

Bryman and Bell (2011) contend that questions of social ontology are concerned with the nature of social entities. For example, ‘Can social entities be considered objective entities that have a reality external to social actors, or should they be considered social constructions built up from the perceptions and actions of social actors?’ These positions are respectively referred to as ‘objectivism’ and ‘constructionism’. The two positions are antithetical to each other. Objectivism asserts that “social phenomena and their meanings have an existence that is independent of social actors” while constructionism asserts that “social phenomena and their meanings are continually being accomplished by social actors... and are in a constant state of revision” (pp. 21-22). The two views can be illustrated by reference to a central term in social science: ‘organisation’. Objectivism suggests that an organisation is a tangible object with rules and regulations, standardised procedures and a division of labour. An organisation has a reality that is external to the individuals who inhabit it and is a constraining force that acts on its members. However, constructionism challenges the suggestion that a category such as ‘organisation’ is pre-given and confronts social actors as an external reality that they have no role in fashioning. Constructionism suggests that order in an organisation is accomplished through interaction and negotiation. Constructionism also suggests that categories that people employ to help them to understand the natural and social world are in fact social constructs whose meaning is constructed in and through social interaction. Meaning is therefore highly ephemeral and will vary according to time and place. Constructionism is highly antithetical to realism (Bryman & Bell, 2011).

Bryman and Bell (2011) contend that ontological assumptions will impact the ways in which research questions are formulated and research is carried out:

If a research question is formulated in such a way as to suggest that organisations and cultures are objective social entities that act on individuals, the researcher is likely to emphasise the formal properties of organisations or the beliefs and values of members of the culture. Alternatively, if the researcher formulates a research problem so that the tenuousness of organisation and culture as objective categories is stressed, it is

likely that an emphasis will be placed on the active involvement of people in reality construction. In either case, it might be supposed that different approaches to the design of research and the collection of data will be required (p. 23).

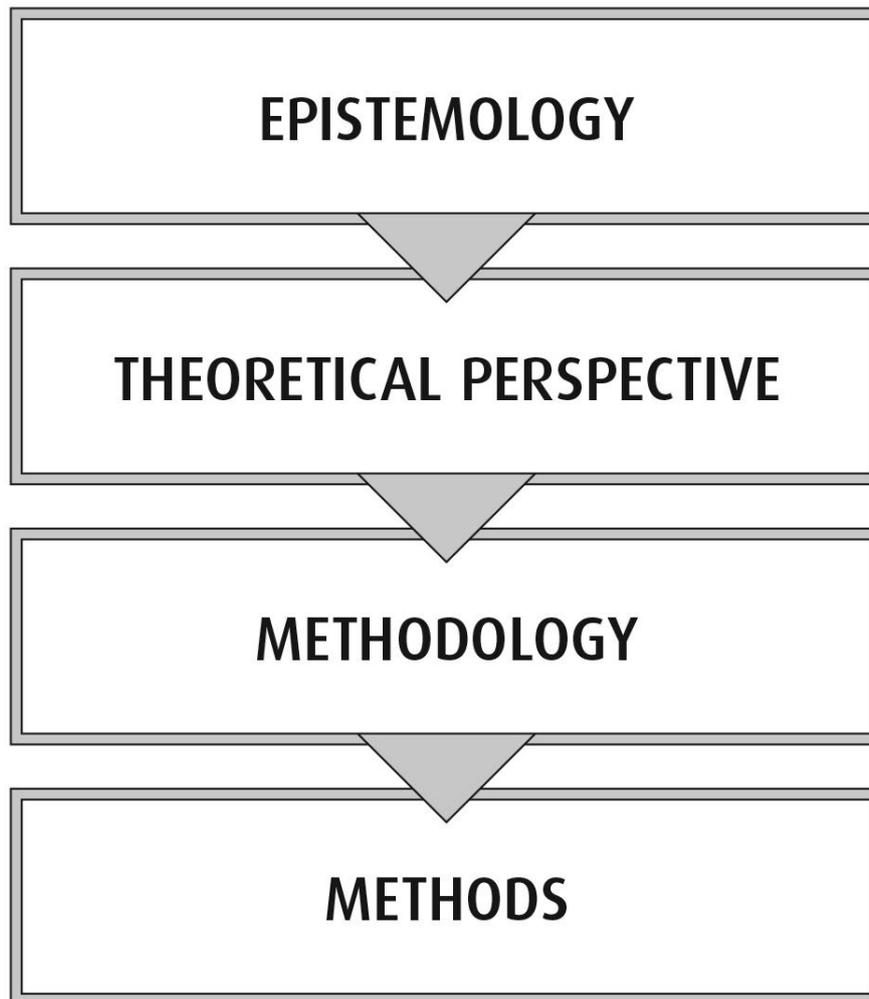
3.3.1.2 Epistemology

Epistemology asks the question, ‘What is the relationship between the researcher and that being researched?’ There is a range of epistemological positions informing theoretical perspectives. “Each epistemological stance is an attempt to explain how we know what we know and to determine the status to be ascribed to the understandings we reach” (Crotty, 1998, p. 18).

Crotty (1998) argues that there are four elements in the research process that progressively inform one another (refer to Figure 3.2): ‘epistemology’ (the theory of knowledge) informs ‘theoretical perspective’ (the philosophical stance) which in turn informs ‘methodology’ (the strategy lying behind the choice and use of particular methods) which in turn informs ‘methods’ (techniques or procedures used to gather and analyse data related to some research question or hypothesis). Crotty (1998, p. 2) suggests that these four elements represent the four basic questions that must be addressed in the research process:

1. What *methods* do we propose to use?
2. What *methodology* governs our choice and use of methods?
3. What *theoretical perspective* lies behind the methodology in question?
4. What *epistemology* informs this theoretical perspective?

Figure 3.2: Crotty’s Four Stage Framework of The Research Process



Source: Crotty (1998) p. 4

There are a range of epistemological positions that inform theoretical perspectives. Objectivism and constructionism have been mentioned above. “Objectivist epistemology holds that meaning, and therefore meaningful reality, exists as such apart from the operation of any consciousness. That tree in the forest is a tree, regardless of whether anyone is aware of its existence or not” (Crotty, 1998, p. 8). On the other hand constructionism rejects this view of human knowledge: “There is no objective truth waiting for us to discover it. Truth, or meaning, comes into existence in and out of our engagement with the realities in our world. There is no meaning without a mind. Meaning is not discovered, but constructed” (Crotty, 1998, pp. 8-9). A third epistemological stance is ‘subjectivism’: “In subjectivism, meaning does not come out of an interplay between subject and object but is imposed on the object by the subject. Here the object as such makes no contribution to the generation of meaning” (Crotty, p. 9). Each epistemological

stance implies a profound difference in how research is undertaken and how the outcomes are presented.

Objectivism takes the epistemological view that careful research can discover objective truth and meaning. This view underpins the theoretical stance of ‘positivism’. Bryman and Bell (2011) contend that the doctrine of positivism is extremely difficult to pin down and outline in a precise manner because it is used in different ways by different authors. They define positivism as a “position that advocates the application of the methods of the natural sciences to the study of social reality and beyond” (p.15). Bryman and Bell (2011, p. 15) suggest that positivism entails the following principles:

1. Only phenomena and hence knowledge confirmed by the senses can genuinely be warranted as knowledge (the principle of phenomenalism).
2. The purpose of theory is to generate hypotheses that can be tested and that will thereby allow explanations of laws to be assessed (the principle of deductivism).
3. Knowledge is arrived at through the gathering of facts that provide the basis for laws (the principle of inductivism).
4. Science must (and presumably can) be conducted in a way that is value free (that is, objective).

Positivism maintains that the role of research is to test theories and to provide material for the development of laws (Pugh, 1983). Bryman and Bell (2011) report that positivist orthodoxy has held sway for decades. Positivism was extremely influential from the mid-19th-century until the mid-20th-century and was the generally accepted view of science. However in recent years it has been largely discredited by methodologists and philosophers of science (Robson, 2002). Crotty (1998) suggests that the world of the positivist is ‘a *mathematised* world’ (p. 27); not the everyday world that most people experience.

‘Interpretivism’ is an alternative, contrasting view to positivism. Interpretivism (often combined with constructionism; see Creswell, 2009) was conceived in reaction to positivism as an attempt to understand and explain human and social reality. Positivists seek to apply the methods of the natural sciences to the understanding of human and social reality. This includes the (allegedly) value-free, detached observation of human beings, society and history which seeks to identify and explain universal features that can offer predictability and control. Interpretivists, on the other hand, “look for culturally

derived and historically situated interpretations of the social life-world” (Crotty, 1998, p. 67). Interpretivism is often associated with the writings of Max Weber (1864-1920). It is Weber’s view that the human sciences are concerned with *Verstehen* (understanding) - an interpretative approach. This contrasts with the explicative approach of the natural sciences - an approach that focuses on explanation and causality. Weber’s sociology studies society in the context of human beings acting and interacting. This understanding is for the purpose of explanation; an interpretive understanding that involves an explanation of relevant antecedent phenomena as meaning-complexes, substantiated by empirical evidence. The centrepiece of his methodology and principal diagnostic tool is what Weber calls the *ideal type*. Ideal types are conceptual constructs that never exist in reality but are useful models that can guide social enquiry (Crotty, 1998). Interpretivism has appeared historically in many guises; for example, as hermeneutics, phenomenology and symbolic interactionism.

A final theoretical perspective to be discussed is ‘post-positivism’. Post-positivism represents the thinking ‘after positivism’, challenging the traditional notion of the absolute truth of knowledge. Thinkers who first criticised positivism and thereby ushered in post-positivism included two eminent physicists, Werner Heisenberg (1901-76) and Niels Bohr (1885-1962), and philosophers Sir Karl Popper (1902-94) and Thomas Kuhn (1922-96) (Crotty, 1998). Post-positivism recognises that “we cannot be ‘positive’ about our claims of knowledge when studying the behaviour and actions of humans” (Creswell, 2009, p. 7). Post-positivism challenges the notion that observer and observed are independent, calling into question positivism’s dogmatic claims to certitude and objectivity. Post-positivism critiques, amends and reforms positivism. Post-positivists, like positivists, believe that a reality exists but post-positivists believe that it can only be known imperfectly and probabilistically (Robson, 2002).

Post-positive research is:

Reductionistic, logical, an emphasis on empirical data collection, cause-and-effect oriented, and deterministic based on a priori theories... Post-positive researchers will likely view inquiry as a series of logically related steps, believe in multiple perspectives from participants rather than a single reality, and espouse rigorous methods of qualitative data collection and analysis (Creswell, 2007, p. 20).

Phillips and Burbules (2000) identify the key assumptions made by post-positivists as follows:

1. Knowledge is conjectural - absolute truth can never be found. Evidence established in research is always fallible and imperfect.
2. Research is the process of making claims and then refining or abandoning some of them where other claims are more strongly warranted.
3. Data, evidence, and rational considerations shape knowledge. The researcher collects information on instruments based on measures completed by the participants or by observations recorded by the researcher.
4. Research seeks to develop relevant, true statements that serve to explain the situation of concern or the causal relationships of interest.
5. Being objective is an essential aspect of competent inquiry. Researchers must examine methods and conclusions for bias. The validity and reliability of the research is important.

One of the most common forms of post-positivism is a philosophy called ‘critical realism’ (Trochim & Donnelly, 2006). Altheide and Johnson (2011) argue that critical realism is a version of ‘realism’:

The basic idea of realism is that there is a real world with which we act and interact, that individuals and groups create meaning in this world, and that while our theories, concepts, and perspectives may approach some kind of valid understanding they cannot and do not exhaust the phenomena of our interest (p. 581).

Altheide and Johnson (2011) suggest that different versions of realism share the following basic ideas:

1. Human social life is meaningful.
2. It is essential to take these meanings into account in our explanations, concepts, and theories.
3. To grasp the importance of the values, emotions, beliefs, and other meanings of cultural members, it is imperative to embrace an interpretivist approach in our scientific and theoretical work.

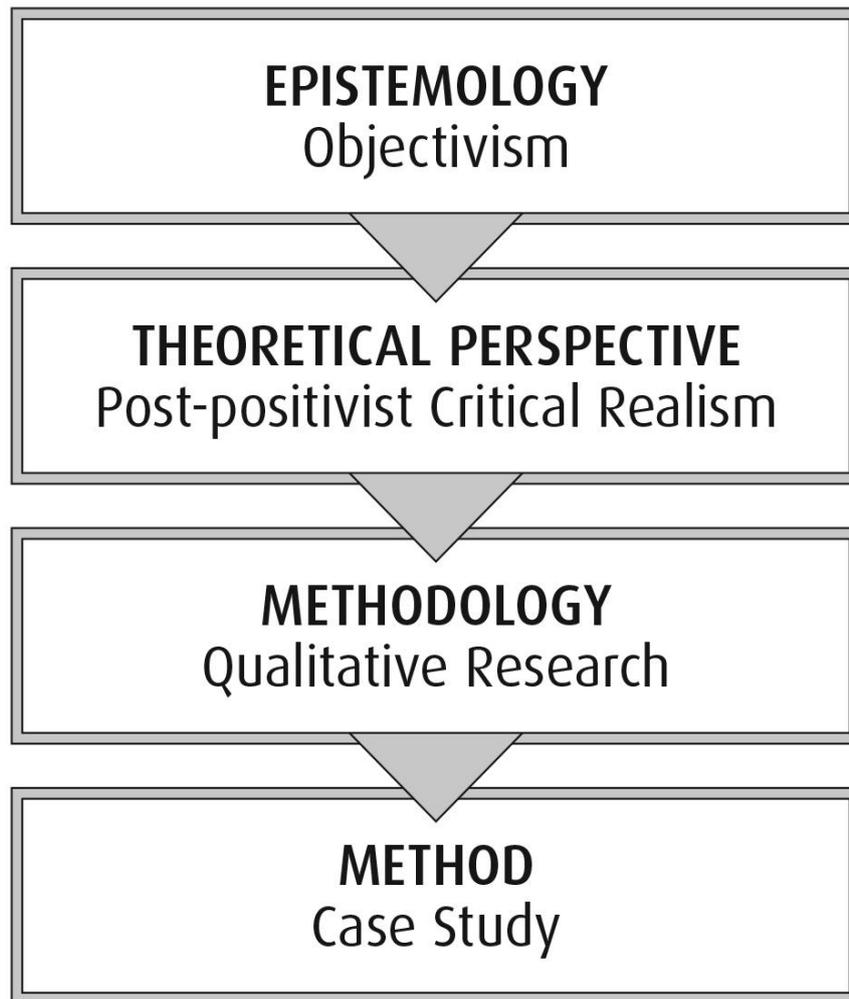
Denzin and Lincoln (2011) note that critical realists agree with positivists that there is a world of events that is observable and independent of human consciousness and that knowledge about this world is socially constructed. However Denzin and Lincoln also note that critical realists take the view that society is made up of feeling, thinking human beings, and their interpretations of the world must be studied. They suggest that scientific

work must include “the analysis of the mechanisms, processes, and structures that account for the patterns that are observed” (p. 11). In this regard it is interesting to note Lincoln, Lynham and Guba’s (2011) observation that there is an increasing amount of ‘blurring of genres’ amongst contending theoretical paradigms today.

Bryman and Bell (2011) assert that critical realists, unlike positivists, “are perfectly content to admit into their explanations theoretical terms that are not directly amenable to observation” (p. 17). The post-positivist critical realist also believes that the categories they employ to understand reality are likely to be provisional. Because all measurement is fallible the need to use triangulation across multiple measures of observation is important in order to get a better understanding of reality. Critical realists believe that this is the best hope for achieving objectivity (Bryman & Bell, 2011).

This research stands in the post-positivist critical realism tradition (refer to Figure 3.3).

Figure 3.3: Crotty's (1998) Four Stage Framework Applied to this Research Process



Source: An application of Crotty's (1998) Research Framework to this research.
Developed for this research.

The next section will look at the methodologies that govern the researcher's choice and use of methods. Methodology is informed by a theoretical perspective such as positivism, post-positivism or interpretivism/constructionism (Crotty, 1998).

3.3.1.3 Methodology

In Crotty's (1998) four stage framework of the research process (refer to Figure 3.2) the distinction between qualitative research and quantitative research occurs at the level of methods.

Qualitative research tends to be concerned with words rather than numbers. The relationship between theory and research is inductive whereby theory is generated out of

research. While some authors suggest that the ontological position of qualitative research is constructionist and the epistemological position is interpretivist (Bryman & Bell, 2011) others suggest that qualitative research cuts across disciplines, fields, and subject matter in a complex array of interconnected terms, concepts and assumptions (Denzin & Lincoln, 2011). Qualitative research has separate and distinguished histories in education, social work, communications, psychology, history, organisational studies, medical science, anthropology, and sociology.

It includes the traditions associated with foundationalism, positivism, post-foundationalism, post-positivism, post structuralism, post-modernism, post-humanism, and the many qualitative research perspectives and methods connected to cultural and interpretive studies (Denzin & Lincoln, 2011, p. 3)

Qualitative researchers study people doing things together in the places where these things are done (Becker, 1986). The epistemological, ontological and methodological premises that shape how the qualitative researcher sees the world may be termed a 'paradigm' or interpretive framework; a basic set of beliefs that guides action (Guba, 1990). This interpretive paradigm determines the questions that are asked and the interpretations that are made from them (Denzin & Lincoln, 2011).

Denzin and Lincoln (2011) assert that any definition of qualitative research must work across the numerous traditions and many methods and approaches that fall under the category of qualitative research (such as case study, politics and ethics, participatory inquiry, interviewing, participant observation, visual methods, and interpretive analysis). They offer a generic definition as follows:

Qualitative research is a situated activity that locates the observer in the world. Qualitative research consists of a set of interpretive, material practices that make the world visible. These practices transform the world. They turn the world into a series of representations, including field notes, interviews, conversations, photographs, recordings, and memos to the self. At this level, qualitative research involves an interpretive, naturalistic approach to the world. This means that qualitative researchers study things in their natural settings, attempting to make sense of or interpret phenomena in terms of the meanings people bring to them (p. 3).

Where there are gaps in the literature it is appropriate to use exploratory, qualitative research to gain insights and an initial understanding of the research problem (Koslow et al. 2003; Malhotra et al. 2002). Questions about 'what' and 'how' are best answered by qualitative research approaches (Morrison, Hayley, Sheehan & Taylor, 2012). Qualitative researchers seek to gain an in-depth understanding of their participants' behaviour and the

underlying reasons and motivations that govern this behaviour. Research samples are smaller than for quantitative research; data collection is unstructured and data analysis is non-statistical (Malhotra et al. 2002).

Qualitative researchers use a variety of different approaches in collecting data, including participant and non-participant observation; in-depth, intensive, face-to-face, one-on-one, in-person interviews (the long interview); focus groups; document analysis and projective techniques - to name a few (Creswell, 2009; Woodside, 2010).

Creswell (2007) suggests that:

When researchers conduct qualitative research, they are embracing the idea of multiple realities. Different researchers embraced different realities, as do also the individuals being studied and the readers of a qualitative study. When studying individuals, qualitative researchers conduct a study with the intent of reporting these multiple realities. Evidence of multiple realities includes the use of multiple quotes based on the actual words of different individuals and presenting different perspectives from individuals (pp. 17-18).

The research employed in this thesis can be identified as qualitative research, informed by post-positivism and realism. To be precise: *post-positivist critical realism*.

3.3.2 The Research Paradigm

Paradigms establish the parameters and set the boundaries for scientific research (Crotty, 1998). The use of the notion of ‘paradigm’ draws on the work of Kuhn (1970) - particularly his influential book ‘*The Structure of Scientific Revolutions*’, in which he questions the alleged objectivity and value-free neutrality of scientific discovery (Bryman & Bell, 2011). Kuhn argues that scientists do their work in and out of a background of theory. In fact, Kuhn (1970) suggests that the significant changes in science appear to have occurred through radical shifts in the way scientists view reality; their interests, their values, their human fallibility and foibles have all played a part in these shifts in perspective (Crotty, 2011).

Bryman (1988) defines a paradigm as “a cluster of beliefs and dictates which for scientists in a particular discipline influence what should be studied, how research should be done, and how results should be interpreted” (p. 4). Crotty (1998) asserts that a paradigm is “an overarching conceptual construct, a particular way in which scientists make sense of the world or some segment of the world” (p. 35). Paradigms influence all

decisions made in the research process. Each paradigm will generate significantly different organisational insights and analyses (Bryman & Bell, 2011).

Different authors use a variety of terms that are essentially synonyms for the construct defined as a 'paradigm': "A basic set of beliefs that guide action" (Guba, 1990, p. 17). For example, Crotty (1998) uses variously the terms: 'epistemologies', 'ontologies' and 'theoretical perspective'; Creswell (2009) uses the term 'philosophical worldview', while Denzin and Lincoln (2011) use the term 'theoretical paradigms and perspectives' (Creswell, 2009).

Utilising Crotty's (1998) Theoretical Framework (refer to Figure 3.3) the research paradigm for this research has been described above as 'post-positivist critical realism'.

3.3.3 Justification for Choice of Research Paradigm

What is an appropriate research paradigm for the study of IMC? As alluded to above, it is important that the researcher is not only aware of the assumptions, paradigms and frameworks (or worldview) that influence their conduct of inquiry but also that they make these philosophical considerations explicit in the reporting of their research (Creswell, 2007). This section seeks to provide a rationale for the research paradigm adopted.

The ontological question fundamental to this study is: 'What is the nature of IMC?' (this question was first discussed in Chapter 2.3.3). IMC is both a concept and a process (Duncan & Everitt, 1993; Duncan & Caywood, 1996), but IMC is also a set of principles and *practices* that differentiate it from previous marketing communication practices (Duncan & Mulhern, 2004). This research argues that IMC practices may be considered objective entities that have a reality external to the social actors concerned with their implementation. This position is referred to as objectivism. Objectivism asserts that organisations are tangible objects with rules and regulations, standardised procedures and division of labour (Bryman & Bell, 2011). In this research the organisations under investigation are advertising agencies - charged with the creation of IMC campaigns for their clients' brands. The practice of implementing IMC by advertising agencies is an objective process that is the focus of this study. This is known as ontological 'realism' (Crotty, 1998). An interpretivist/constructivist approach to the study of IMC requires the researcher to subscribe to ontological 'relativism' - a position where there is no objective reality to study and every interviewee's view of the world is correct; meaning is highly

ephemeral and will vary according to time and place (Bryman & Bell, 2011; Crotty, 1998).

The theoretical perspective of this research is post-positivist critical realism. This assumes that an objective reality exists, albeit that that reality is difficult and challenging to study and that absolute truth can never be found (Creswell, 2009). As already noted, Denzin and Lincoln (2011) contend that critical realists view society as being made up of feeling, thinking human beings, whose interpretations of the world must be studied. This research seeks to study the views and interpretations of IMC by selected participants, utilising in-depth interviews, document analysis and multiple case studies.

It can be argued that most researchers in marketing are post-positivists (Creswell, 2007) and most case studies in marketing are post-positivist - with realism the preferred paradigm (Perry, 1998).

The rationale for the employment of case study research will now be discussed.

3.4 Methodology: Case Study Research

Eisenhardt (1989) defines the case study as “a research strategy which focuses on understanding the dynamics present within single settings” (p. 534). Case studies are a popular form of research design used in business research (Bryman & Bell, 2011; Yin, 2009). Most commonly, case studies are associated with a geographical location such as a workplace or an organisation. Case studies can be distinguished from other research designs by their focus on ‘a bounded situation or system’ (Bryman & Bell, 2011).

According to Yin (2009) case studies are typically used when ‘how’ or ‘why’ questions are posed. The method is particularly relevant the more an in-depth description of a social phenomenon is required.

Creswell (2007, p. 73) suggests that: “Case study research involves the study of an issue explored through one or more cases within a bounded system (i.e., a setting, a context)”.

He further describes case study research as:

“A qualitative approach in which the investigator explores a bounded system (a case) or multiple bounded systems (cases) over time, through detailed, in-depth data collection involving multiple sources of information (e.g., observations, interviews, documents and reports) and reports a case description and case-based themes.” (Creswell, 2007, p. 73)

Creswell (2007) argues that a case study approach is an appropriate procedure to use when the researcher has clearly identified cases with boundaries and seeks to provide an in-depth understanding of these cases - or the comparison of several cases.

Case study research has strengths and limitations. The main strength of the case study is depth - in detail, richness and completeness. When there is a need to understand a complex phenomenon with a degree of thoroughness, case studies can provide this, linking causes and outcomes. Case studies can foster new hypotheses and new research questions (Flyvberg, 2011). However, given there are no standard procedures to follow when conducting a case study “the freedom to search for whatever data an investigator deems important makes the success of any case study highly dependent on the alertness, creativity, intelligence, and motivation of the individual performing the case analysis” (Zikmund, 1997, p. 108). Case studies are exploratory and offer insights into both theory building and theory testing - but do not support empirical generalisations. This is the role of quantitative research.

Woodside (2010, p. 6) asserts that “deep understanding of the actors, interactions, sentiments, and behaviours occurring for a specific process through time should be seen as the principal objective by the case study researcher.” This deep understanding, according to Woodside (2010), usually involves multiple research methods - including probing questions and the analyses of written documents - across several time periods.

This research involves multiple case studies. The research investigates how five New Zealand advertising agencies work through the process of creating IMC campaigns for their clients’ brands. In describing this process the research seeks to determine the role (if any) of the brand identity concept in the process.

The study commences with the recording and transcription of each participant’s views concerning the creative process employed by their agency in the creation of integrated brand communications for their clients. The nine research questions presented in Section 3.2.3 are then applied to this data and participants’ responses to these questions become the building blocks for each case study relating to each of the five agencies. The case studies are constructed using ten topics that include the nine research questions (refer to Section 3.5.4).

The next section will look at some of the advantages of utilising a multiple case study design in this research.

3.4.1 Multiple-Case Study Design

Multiple-case study designs have become increasingly common in business research. They are largely undertaken for the purpose of comparing the cases that are included in the research (Bryman & Bell, 2011). An advantage of studying multiple cases is that a single set of cross-case conclusions can be drawn (Yin, 2009). Multiple cases allow the researcher to compare and contrast the findings derived from each of the cases; what is unique and what is common across cases (Bryman & Bell, 2011).

The replication involved in this multiple-case study enhances the possibility of more compelling evidence and of a more robust study than would be obtained from a single-case design. The main argument in favour of the multiple-case study design is that it improves theory building. “By comparing two or more cases the researcher is in a better position to establish the circumstances in which a theory will or will not hold.” (Bryman & Bell, 2011, p. 66)

Yin (2009, p. 54) argues that:

“The ability to conduct 6 or 10 case studies, arranged effectively within a multiple-case design, is analogous to the ability to conduct 6 to 10 experiments on related topics... If all the cases turn out as predicted, these 6 to 10 cases, in the aggregate, would have provided compelling support for the initial set of propositions.”

This logic is similar to that used by scientists dealing with experimental findings. Yin (2009) contends that if a researcher wants a higher degree of certainty concerning their multiple-case results they should press for five, six or more replications.

3.4.2 Justification for Choice of Case Study Methodology

Perry (1998) asserts that ‘realism’ is the preferred paradigm for case study research. In support of this assertion Perry (1998) argues that case study research areas usually require inductive theory building rather than deduction from already existing principles and constructs. Secondly, realism does not suffer from the limitations of relativism, for realism is often characterised by some degree of researcher objectivity; that is, the belief that there is an external world which can be researched. “In other words, case study research efforts usually involve the collection of perceptions of ‘unobservable’ external

world phenomena such as perceptions” (Perry, 1998, p. 787). Perry (1998) concludes that case study research fits within the critical realism paradigm and is essentially inductive, theory building research. This view is consistent with the stated paradigm for this research; ‘post-positivist critical realism’.

3.5 Research Design

As discussed above this research involves multiple case studies. It has a “multiple-case, replication design” (Yin, 2009, pp. 53-54). Multiple-case designs offer distinct advantages over single-case designs in that evidence from multiple cases is considered more compelling and the study more robust than for single-case designs.

This research draws on focused, in-depth interviews conducted with senior-level executives in five leading New Zealand advertising agencies. A research protocol was used to guide the researcher in the collection of data (refer to Appendix 1.2). Protocols are an important way of increasing reliability or trustworthiness in case study research (Lincoln & Guba, 1985; Yin, 2009). The interviews were semi-structured and were supplemented by access to proprietary agency documents and templates relating to the creative process (refer to Appendix 2). In addition, the interactions and decision making processes of senior agency executives and their clients in each agency were mapped using Decision System Analysis (refer to 3.5.4.2). Relevant news clippings and media articles relating to each of the five agencies were also collected and used as background information.

The advantage of presenting multiple sources of evidence is the development of converging lines of enquiry; that is, the process of data triangulation and corroboration (Yin, 2009). Triangulation improves the probability that research findings (and interpretations based upon them) will be found to be credible (Lincoln & Guba, 1985).

In summary, the research involves five New Zealand advertising agencies, with each agency representing one case. Within each agency the focus of the study is the process involved in the agency’s creation of IMC campaigns for their clients’ brands.

3.5.1 Population and Sampling

According to the 2013 edition of AdMedia’s Agencies & Clients (the only published list of New Zealand’s advertising agencies and media independents) there were 113 advertising agencies and 42 media independents operating in the local New Zealand

advertising industry in 2013. Of the 113 advertising agencies, 56 were listed as being independent (100% privately owned). AdMedia's (2013) Agencies & Clients listed an additional 37 independent New Zealand advertising agencies on their website (the combined total of 150 agencies was not complete however as several high-profile independent agencies were not included). The largest number of full-time employees reported was 240 for a leading international agency, while the largest independent agency reported having 80 full-time employees.

This study uses purposeful sampling. Creswell (2007, p. 125) describes purposeful sampling as follows:

(Where) the enquirer selects individuals and sites for study because they can purposefully inform an understanding of the research problem and (the) central phenomenon in the study.

Patton (2002, p. 230) argues that "the logic and power of purposeful sampling lies in selecting *information-rich cases* for study in-depth"; cases from which the researcher can learn a great deal about issues of central importance to the purposes of the inquiry - hence the term 'purposeful sampling'. Purposeful sampling selects cases whose study will best illuminate the research questions being asked.

In this study specific advertising agencies were selected because they were judged to be capable of providing the desired information required by the study because they conformed to predetermined criteria set by the researcher. The agencies selected do not form a conventional representative sample but they do span the range of successful advertising agencies practicing in New Zealand. They reflect aspects of the diversity of the industry in terms of agency size (billings and number of fulltime employees), ownership, local and overseas affiliations, marketing communication philosophy, media mix, range of services offered and length of time established in the New Zealand marketplace. The agencies in the sample were included because they all employ account planners and have a history of success in winning awards in different advertising industry competitions (for example, the Communication Agencies Association of New Zealand EFFIE Awards, i.e., the annual awards recognizing the most effective marketing communications efforts in New Zealand for the year). They all have track records that include numerous successful brand communication campaigns over a number of years (refer to Section 3.5.1.2).

Brief profiles of the agencies studied in this research are presented in Table 3.1:

Table 3.1: Profiles of the Agencies Studied

Name of Agency	Profile
AGENCY ONE Billings Staff Numbers Status Range of Services Account Planners	NZ\$100 - 200 Million 100+ Multi National Full Service Agency Yes
AGENCY TWO Billings Staff Numbers Status Range of Services Account Planners	NZ\$25 - 50 Million 25+ Independant Full Service Agency Yes
AGENCY THREE Billings Staff Numbers Status Range of Services Account Planners	NZ\$100 - 200 Million 100+ Multi National Full Service Agency Yes
AGENCY FOUR Billings Staff Numbers Status Range of Services Account Planners	NZ\$25 - 50 Million 25+ Independant Full Service Agency Yes
AGENCY FIVE Billings Staff Numbers Status Range of Services Account Planners	NZ\$100 - 200 Million 100+ Multi National Full Service Agency Yes

Source: Developed for this research

This research explores the strategic creative practices of five leading New Zealand advertising agencies, representing a cross-section of the industry. The five agencies include three large multinational agencies billing between \$100-200 million each and two medium sized, locally owned/controlled independent agencies billing between \$25-50 million each.

It was anticipated that the data gathered from these agencies would reflect a diverse range of *contrasting* behaviours regarding the implementation of the brand identity concept in the IMC creative process by their key agency executives (brand strategists/account planners, creatives, and client service executives). It was also anticipated that the data gathered might also reveal numerous *similar* practices by the agencies in their creation of IMC for their clients' brands.

3.5.1.1 The Unit of Analysis

What is the primary unit of measurement and analysis in this research? Bryman and Bell (2011) observe that there are different levels of analysis that research might focus on: individuals, groups, organisations, and societies (commonly referred to in terms of the SOGI model: societies, organisations, groups, and individuals). The focus of this research is at the organisational level; seeking to determine how five different advertising agencies create IMC campaigns for their clients.

Yin (2009) suggests that there can be undesired confusion between the unit of data collection and the unit of analysis. For example, the unit of data collection in this study may be the interviewee while the unit of analysis is the organisation. In this research the focus is not on an individual per se but on the organisational role that they play; the focus is on how key roles within an agency organisation cooperate to produce IMC campaigns for their clients. The focus therefore includes the roles that participants play in the process as well as the process itself.

The unit of analysis in this study is therefore *the branding process involved by a single advertising agency in the creation of IMC campaigns for their clients.*

3.5.1.2 Justification for Choice of Sample

Based on any relevant criteria leading New Zealand advertising agencies produce world-class award-winning advertising and marketing communications. Examples of New Zealand agencies ranked at the top end of leading international industry league tables are as follows:

Warc ranking of the world's top 100 smartest creative agencies: These rankings are based on the Warc100 database, which tracks winners of effectiveness and strategy awards from around the world each year. To compile the rankings Warc track more than

1700 winners in 75 different competitions, assigning points based on the awards won (for example Gold, Silver or Bronze), then weighting those points based on the competition's rigour and prestige in the global industry. In September 2014 New Zealand agency Colenso BBDO was declared the top creative agency in the world for 2014. As well, Proximity New Zealand was ranked as the top digital agency in the world for 2014 by Warc, and DDB New Zealand was ranked the 18th smartest agency in the world for 2014. In February 2015 Colenso BBDO was ranked 3rd in Warc's Top 100 Creative Agency list for 2015 and FCB Auckland was ranked number 16. Five New Zealand creative agencies made the Global Top 100 Marketing Campaigns list, including FCB Auckland (number 26), Republik (number 35), Saatchi & Saatchi Auckland (number 60), Colenso BBDO (number 77) and DDB Auckland (number 98). New Zealand was ranked number 7 in the Country Rankings list (www.warc.com).

The Big Won ('The Won Report'): A London-based website-based analysis of the world's best advertising communications, as measured by awards won. An annual global report, tracking award performance of marketing communications agencies across all media categories and disciplines throughout the year. The rankings analyse the results of 39 industry awards shows, approximately 4500 campaigns or creative pieces by more than 1500 agencies from around the world. In January 2013 Colenso BBDO was named the top creative agency in the world for 2012 in The Big Won report. It was the first time a New Zealand or Australian agency had won the title and bettered the previous top performance by an Australasian agency - Colenso BBDO's fifth placing in 2011 (Sunday Star Times, 20 January, 2013). The Big Won ranking is considered one of the most desirable listings in the world because it takes into account an agency's performance in award shows across all media categories and disciplines. New Zealand was ranked the 10th best country in the world for marketing communications in 2012. In 2011 the country was ranked 9th. In 2011 New Zealand agency DraftFCB was ranked the 21st best creative agency in the world and the second best direct agency in the world (www.campaignbrief.com).

The Gunn Report: Founded by Donald Gunn in 1999, this report combines the winners' lists from all of the world's most important award contests, in order to establish the annual worldwide league tables for the advertising industry. In 2013 this encompassed 46 shows in total - National, Regional and Global - and the winners at these shows in TV, Print, Digital and 'All Gunns Blazing'. Colenso BBDO was ranked the fourth top agency

in the world for creativity in 2013 and DraftFCB was ranked number six in the world in 2013 (www.gunnreport.com).

Global Effie awards: The EFFIE Effectiveness index is derived from more than 3000 finalists and winning entries to Effie Award competitions worldwide in a given year. Two New Zealand agencies were ranked among the top five in the world in the 2013 EFFIE effectiveness index compiled by EFFIE Worldwide and Warc. Colenso BBDO was placed number five in the Most Effective Agency Offices category, while Barnes, Catmur and Friends was placed number five in the Most Effective Independent Agencies category. In 2015 FCB New Zealand was ranked number five in the world and Colenso BBDO/Proximity New Zealand was ranked number eight. Saatchi and Saatchi, Auckland, New Zealand were ranked number 24 in the world in 2015 (www.affieindex.com).

The Cannes Report: This report is available online through the Cannes Lions Archive. With over 37,400 entries from more than 90 countries, Cannes Lions is the largest global awards competition for creativity in marketing communications. Colenso BBDO was ranked number five in the Asia Pacific region in 2014 (canneslionsarchive.com).

Campaign Brief rankings: New Zealand was the 8th ranked creative country in the world in 2014, according to Bestads rankings out of Australia's Campaign Brief magazine/blog (the rankings are based on global award wins). New Zealand came 4th on the Bestads All-Time list for the decade to 2014 (the USA was number one, followed by the UK, Australia, New Zealand, and France). There were no New Zealand or Australian winners in the global agency rankings list for 2014. The top New Zealand agency in 2014 was FCB, followed by DDB, Clemenger BBDO, Colenso BBDO, Ogilvy, Whybin/TBWA and Y&R (www.campaignbrief.com).

In New Zealand, CAANZ CEO Paul Head described the CAANZ New Zealand Effie Awards as “the most coveted award of its kind in New Zealand due to its rigorous judging and international credibility” (www.caanz.co.nz). The winning of one of the two supreme award categories in this competition is a most coveted achievement by New Zealand marketing communication agencies: the Most Effective Agency of the Year award and the Grand EFFIE award. In 2013 and 2014 the Most Effective Agency of the Year award was won by FCB, in 2012 it was won by DDB. The Grand EFFIE award was won by Saatchi & Saatchi in 2014, by FCB in 2013 and by DDB in 2012. Winners in other categories in this competition between 2012 and 2014 include Colenso BBDO,

Proximity, Clemenger BBDO, Ogilvy & Mather, Y&R, Whybin/TBWA, Barnes, Catmur & Friends and Special.

It is reasonable to conclude from the above record that the award-winning practices of the agencies listed represent industry ‘world-class best practice’. It is also reasonable to conclude, therefore, that a study of five leading New Zealand advertising agencies might provide insights into cutting-edge best practice in the world-wide advertising industry.

Agencies selected for this research are amongst the winning agencies listed above.

3.5.2 Data Collection

Case study evidence can come from many sources. Yin (2009) lists six sources of evidence: documentation, archival records, interviews, direct observation, participant observation, and physical artefacts. This research used two of these sources to inform its five case studies: interviews and documentation.

Yin (2009) suggests three principles of data collection that, when used properly, will help to establish the construct validity and reliability of the case study evidence:

First, use multiple sources of evidence (this will assist in the development of converging lines of enquiry; a process of triangulation and corroboration). Second, create a case study database (to organise and document all the data collected for the case studies). Third, maintain a chain of evidence (to increase the *reliability* of information in the case study; a notion similar to that used in forensic investigations).

Yin (2009) argues that the above principles represent formal procedures that will help ensure quality control during the case study data collection process. This study adopted these principles.

The following sections discuss the two forms of data collection utilised by this research: in-depth interviews and documentation.

3.5.2.1 Semi-structured In-depth Interviews

Qualitative interviews have the potential to provide the researcher with rich, detailed information from the interviewee. Bryman and Bell (2011) assert that in qualitative interviewing “interviewers can depart significantly from any schedule or guide that is being used. They can ask new questions that follow up interviewees’ replies and can vary

the order of questions and even the wording of questions” (p. 467). Consequently qualitative interviewing can be flexible and dynamic, responding to the direction in which interviewees take the interview. The in-depth qualitative interview is a conversation between equals, directed toward understanding the interviewee’s perspective on an issue or situation as expressed in their own words. The interviewer strives to create an atmosphere in which people feel comfortable expressing their views. The interview is relaxed and conversational (Taylor & Bogdan, 1998).

This study utilised a multi-stage interview process. The first stage involved semi-structured, in-depth interviews with 18 selected senior agency and client personnel who worked together on a brand being promoted. This was “an intensive questioning of informants selected for their special knowledge, experience and insights” (Woodside, 2010; p. 263). These interviews served to mine participants’ thinking, feeling and action processes in regard to the creation of IMC for a brand. The second stage involved follow-up communication with agency principals to verify that case study data relating to their agency was correct and to modify it if it was not. The final stage involved verification of a generic DSA flow chart by three representative agency principals.

Bryman and Bell (2011) suggest that in semi-structured interviews the researcher has a list of questions on a specific range of topics to be covered (sometimes called ‘the interview guide’) but the interviewee has a great deal of leeway in how to reply. New questions, not included in the interview guide, may be asked by the researcher to pick up on comments made by the interviewee. The interview protocol serves to remind the interviewer to ask about certain important topics. Ultimately, however, all of the questions will be asked and similar wording will be used from interviewee to interviewee (Taylor & Bogdan, 1998).

In November and December 2012 the researcher telephoned the CEOs of seven Auckland-based advertising agencies and one brand consultancy inviting them to be involved in his PhD research (each agency had met the criteria for selection in the research sample - described in Section 3.5.1.). Two agencies declined participation because they were in the throes of restructuring but five accepted the invitation, as did the brand consultancy. Although the researcher was known to the CEOs of the five agencies - by reputation as an advertising academic - he only knew one of them well, who did not subsequently participate in the research. (None of the research participants were well-

known to the researcher and 15 of them were complete strangers to him prior to the research). The participating CEOs were each invited to select three of their senior executives to participate in the research; a senior client service executive, a senior creative executive and a senior account planning executive - executives who had worked together as a team on IMC campaigns for the agency's clients' brands.

Five senior agency executives and one senior client Marketing Manager were interviewed for the Agency One case study and three senior agency executives were interviewed for each of the four remaining agency case studies. One senior executive of a leading brand consultancy was also interviewed. A total of 19 interviews were recorded, transcribed and edited for this research (refer to Table 3.2).

Executives were selected for interview based on their ability to provide insights into the creative process undertaken by each agency in the creation of IMC for their clients' brands. Where possible this would include the Managing Director or Managing Partner, a senior Creative Director, the Planning Director and a senior client service executive. In every agency the researcher was able to interview a senior executive representing three critical roles in the creative process: a senior client service executive, a senior planner and a senior creative (refer to Figure 4.2).

In Agency One the Managing Director generously facilitated access to a range of senior executives involved in the creative process. As well as himself the following executives were interviewed: a Group Account Director, the Head of Planning, the Digital Creative Director, the agency Operations/Production Director and a client Marketing Manager. All of these executives worked on a specific IMC campaign for a single client brand. This access to a large number of relevant executives added depth of opinion and insight to the Agency One case study. It was not possible to gain access to a similar range of executives in any of the other four agencies but in each agency the senior executives interviewed represented the critical roles of client service, planning and creative.

The researcher also interviewed the Managing Director of a leading brand consultancy, seeking insights into the branding process from a non-advertising agency perspective. This interview primarily involved an explanation by the participant of the consultancy's 'Brand Toolbox' booklet and was therefore extra to and outside of the unit of analysis chosen for this research. However, items from the toolbox have been included in the research discussion (refer to Figure 2.2 and Appendix 2.5).

Table 3.2 provides a list of all executives interviewed for the research.

Table 3.2: List of Evidentiary Sources: Executives Interviewed in Each Agency

Name of Agency	Job Title
Agency One	Managing Director Head of Planning Group Account Director Digital Creative Director Operations/Production Director Client Marketing Manager
Agency Two	Founding Partner Managing Partner/Planning Director Creative Director
Agency Three	Managing Partner Planning Director Copywriter
Agency Four	Managing Partner Creative Director Planning Director
Agency Five	Director of Planning Group Executive Creative Director Head of Account Service
Brand Consultancy	Managing Director

Source: Developed for this research

An interview protocol was used (refer to Appendix 1.2). The protocol included predetermined open-ended questions (Creswell, 2009, pp. 127-128) derived from the literature review and addressed the nine research questions (refer to Section 3.2.3).

The interviews commenced with brief introductory comments designed to put participants at ease. All participants had received a Participant Information Sheet prior to their interview (refer to Appendix 1.1), and the opening discussion in each interview was designed to ensure that interviewees were aware of the purpose and scope of the research, were willing to participate in the research, and had familiarised themselves with the interview questions to be discussed. Participant Consent Forms (refer to Appendix 1.3) were then signed off, and, where necessary, Document Consent Forms (refer to Appendix 1.4) were signed off. The Confidentiality Agreement between the researcher and the

participant was also signed off (refer to Appendix 1.5). The interview would then commence and would take 60-90 minutes to complete.

All interviews were audio-recorded and then transcribed by a professional transcriber to provide a basis for subsequent analysis by the researcher. The interview transcripts were then edited by the researcher. Editing was undertaken to remove extraneous comments from the interview and to enhance the readability of the transcripts. The edited transcripts were then used as a basis for preparing individual agency case studies and DSA flow charts, mapping key decision points in the creative process (refer to Section 3.5.4.2).

3.5.2.2 Interview Schedule

The five agencies were visited by the researcher over a period of 27 weeks (6 months) between 12 February and 20 August 2013. 19 interviews were recorded during this time. Participants from each agency were interviewed, one by one, in an allocated conference room at their agency. Sometimes up to three participants were interviewed in a single day, but normally interviews were scattered through the week in order to fit in with busy schedules. As mentioned above, interviews normally lasted between 60 and 90 minutes. The interviews were completed on the following dates:

Agency One:

Digital Creative Director: Tuesday 12 February 2013

Head of Planning: Tuesday 12 February 2013

Group Account Director: Thursday 14 February 2013

Operations/Production Director: Thursday 14 February 2013

Managing Director: Thursday 14 February 2013

Client Marketing Manager: Monday 18 February 2013

Agency Three:

Planning Director: Thursday 28 February 2013

Copywriter: Thursday 28 February 2013

Managing Partner: Thursday 28 February 2013

Agency Five:

Group Executive Creative Director: Tuesday 12 March 2013

Head of Account Service: Tuesday 20 August 2013

Director of Planning: Tuesday 20 August 2013

Agency Two:

Creative Director: Tuesday 19 March 2013

Managing Partner/Planning Director: Wednesday 20 March 2013

Founding Partner: Thursday 28 March 2013

Brand Consultancy:

Managing Director: Thursday 28 March 2013

Agency Four:

Managing Partner: Tuesday 2 April 2013

Planning Director: Tuesday 2 April 2013

Creative Director: Tuesday 2 April 2013

In addition: *The Validation of the Generic DSA Chart*

Agencies One, Four and Five: Monday 24 March 2014

3.5.2.3 Justification for Choice of Interview Questions

This section discusses how the interview questions (Appendix 1.2) were derived from the literature review (refer to Chapter 2) and address the research questions (Section 3.2.3).

As discussed above (Section 3.5.1.1) the unit of analysis in this study is *the branding process involved by a single advertising agency in the creation of IMC campaigns for their clients*. All interview questions are ultimately designed to understand this process.

The five central research questions and the four sub-questions address issues fundamental to this research, derived from the literature review:

RQ1: What is the role of the Account Planner in the agency?

The Account Planner (or Brand Strategist) is a relatively new role in advertising agencies in New Zealand and plays a pivotal role in the planning and implementation of IMC strategies in contemporary agencies. The role of the Account Planner is discussed in Section 2.3.11.2 of the literature review. A critical role of the Account Planner is the preparation of the creative brief - considered the most important document in the agency (Butterfield, 1985). Given that the creative brief is the basis for the creation of IMC by the agency (certainly at the tactical level) elements and data that go into the formation of that brief by the Account Planner are of the utmost interest to this study.

Interview questions that relate to RQ1 are:

Q1: Do you have account planning people in your agency? If not, why not?

Q2: What do you see as the role of the Account Planner in your agency? (Also relevant to RQ3.1).

Q3: How does the Account Planner relate to the client, the account service people and the creatives in your agency?

RQ2: What is the role of the creative brief in the creative process?

The role of the creative brief is discussed in Section 2.3.11.3 of the literature review. Table 2.7 outlines the steps involved in preparing the creative brief.

Interview questions that relate to RQ2 are:

Q4: What is the role of the creative brief in your agency?

Q5: Who is responsible for preparing the creative brief in your agency?

Q6: Is there an agency template for writing the creative brief in your agency? (Also relevant to RQ3.3).

RQ3: What is the role of brands in the creative process?

The role of brands in the IMC creative process is given extensive attention in the literature review of this thesis. Section 2.2 discusses the brand equity concept, antecedents of brand equity and the concept of customer equity. Section 2.3.7 discusses the interplay between the corporate brand construct and the product brand construct. The brand identity construct is discussed in relation to brand image in Section 2.3.8 and to IMC in Section 2.3.9. The research issue central to this study relates to the role of the brand identity statement in the implementation of IMC. Is it an important planning tool for agency planners - with the potential to facilitate the convergence and implementation of the strategic and tactical elements of the brand being promoted - or is it considered irrelevant or not used by planners in this process?

Interview questions that relate to RQ3 are:

Q7: What is the role that brands and branding play in the creation of your marketing communications?

Q8: Does your agency or client company have any proprietary statements or models concerning ‘brand identity’, ‘brand DNA’, ‘brand footprints’, ‘brand onions’ or a similar concept? Please explain.

Q9: Does your agency use a (generic) ‘brand identity’ statement in the creation of a marketing communications campaign for a client brand? Please explain how this works. What are the key elements or components of this statement or model? (Also relevant to RQ3.2, RQ3.4 and RQ5).

RQ4: What are the drivers that integrate marketing communications?

IMC is a major focus of this study. The literature review (Chapter 2) seeks to review the history and evolution of the IMC concept since its inception as an academic topic in the 1990s (Sections 2.3.1 and 2.3.2). The debate over the nature of IMC (Section 2.3.3), the concepts of integration and synergy (Section 2.3.4), the levels of integration of IMC (Section 2.3.5) and the implementation of IMC (Section 2.3.6) are discussed at length. The important distinctions between the corporate brand construct and the product brand construct (Section 2.3.7) and the brand identity construct and the brand image construct (Section 2.3.8) are then discussed. The literature relating to the role that the brand identity construct plays in the implementation of IMC is reviewed (Section 2.3.9), as is the literature relating to the antecedents and consequences of IMC (Section 2.3.10). The role of the creative advertising agency in the IMC process is explored in depth (Section 2.3.11), and finally, issues relating to the measurement and evaluation of IMC effectiveness are discussed (Section 2.3.12).

Interview questions that relate to RQ4 are:

Q10: How would you define integrated marketing communications (IMC)?

Q11: What are the benefits (if any) of integrated marketing communications (IMC)?

Q12: How does your agency integrate the integrated marketing communications of brands that the agency promotes?

Q13: From what source(s) do you draw your understanding of the theory and practice of integrated marketing communications (IMC)?

Interview questions 14-17 seek to elicit insights into the respective agency systems, processes and practices involved in the implementation of IMC by agencies for their

client's brands. These questions are informed by Sections 2.3.10, 2.3.11 and 2.3.12 of the literature review:

Q14: How does the client brief inform the creative brief and the media brief in your agency? What is the role of your account service people in this process?

Q15: What process (or steps) does your agency follow between receiving a client brief and producing finished marketing communications that engage the prospect and/or consumer?

Q16: After marketing communications have appeared in the media is there any subsequent evaluation of the communication's effectiveness? What forms of evaluation are common or mandatory? What are the key decision points in this process?

Q17: What contribution(s) does your agency make towards solving your client's business problems? How do you measure these outcomes?

RQ5: To what extent is IMC, as practised by New Zealand advertising agencies, anything more than just 'tactical integration'?

There are no interview questions that relate directly to RQ5. In each case study answers to this question are derived from an analysis of answers provided to all the preceding questions by participants from that agency.

The discussion will now review the documents utilised in the data collection process of the study.

3.5.2.4 Documents

Although the research's case study data was gained primarily from in-depth interviews with participants, the exploratory nature of these interviews was balanced by reference to relevant agency documents. These documents were examined by the researcher, not only for confirmatory evidence of statements made by participants but also for further insights into the philosophy and practice of the agency being studied. In this way the evidence was triangulated, providing increased validation.

Documents can be a window into social and organisational realities. Bryman and Bell (2011) argue that it is tempting to assume that documents reveal something about an underlying social reality, that documents tell us something about what goes on in an

organisation. However, Atkinson and Coffey (2004) express scepticism concerning the extent to which documents can be viewed in this way. They argue that documents should be examined in terms of the context in which they were produced and who they were written for. Atkinson and Coffey's central message is that documents have a distinctive ontological status; that they form a separate reality and need to be recognised for what they are – as written with a distinctive purpose in mind – and not as simply reflecting reality. Therefore, they argue, researchers need to buttress their analysis of documents with other sources of data.

Documents studied in this research included client briefs to the agency, secondary data compiled by agencies, agency qualitative research data, previous advertising for the brands studied, agencies' proprietary products - including statements of corporate creative philosophy and research philosophy. In addition, relevant news clippings and media articles relating to each of the five agencies were collected and used to inform the research.

Table 3.3 provides a list of proprietary documents obtained from each agency. The list includes briefing templates, process models, credentials documents, strategic documents, Effie case studies, brand books, brand manifestos, and organisational and philosophical documents. Industry articles relating to different agencies were also referred to. A number of documents were also obtained from the brand consultancy. These documents included a brand toolbox and several global brand value annual league tables. All of these documents added to the triangulation of the research.

Table 3.3: List of Evidentiary Sources: Proprietary Documents Obtained

Name of Agency	Name of Documents
Agency One	Client Planning Brief Template Agency Long Brief Template Agency Short Brief Template Agency Creative Process Model The Creative Process: Teams/Triangles Model The Account Planning Process Model Agency Post-Campaign Analysis Template
Agency Two	Agency Credentials Book Agency Planning Document
Agency Three	Agency 'Change Brief' Template Agency 'Brand Conviction' Questions Agency 'Brand Conviction Springboard' Document Agency 'The Springboard Approach' Booklet Effie Case Study Client One Brand Book Client Two Brand Book
Agency Four	Effie Case Study
Agency Five	'The Wheel' Organisational Model Behavioural Change Philosophy Document 'The Art Of Persuasion' Document Strategic Kick Start Template Client Brand Manifesto Example Campaign Brief Example Effie Case Study Behaviour Map Example
Brand Consultancy	'Brand on a Page' Template 'Brand Toolbox' Booklet 'Brand Value. Our Common Language' Booklet 'Best Global Brands 2012' Booklet 'Best Retail Brands 2011' Booklet

Source: Developed for this research

3.5.3 Stages in the Research Procedure

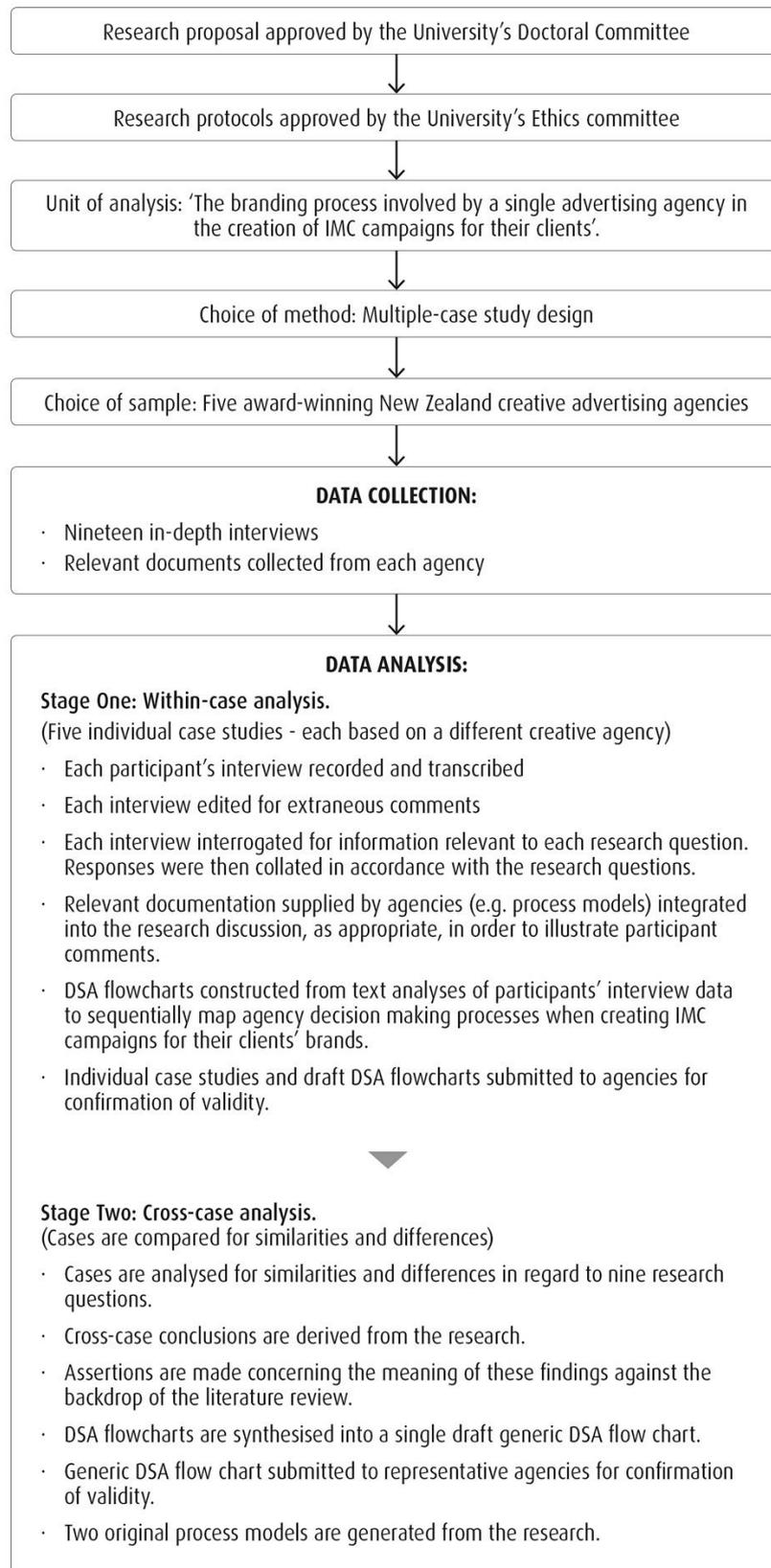
According to Yin (2009) an important principle to follow in case study research is to maintain a chain of evidence. This principle is similar to a notion used in forensic investigations:

The principle is to allow an external observer - in this situation the reader of the case study - to follow the derivation of any evidence from initial research questions to ultimate case study conclusions (Yin, 2009, p. 122).

Yin (2009) suggests that this increases the reliability of the information in a case study. Lincoln and Guba (1985) liken this process to creating an audit trail.

Figure 3.4 lists the steps in the research process.

Figure 3.4: Steps in the Research Process



Source: Developed for this research.

The steps in the research process are discussed below:

Following the approval of the Research Proposal by the University's Doctoral Committee, Research Protocols were prepared for and approved by the University's Ethics Committee (refer to Appendix 1.7). These protocols included:

Participant Information Sheet (Appendix 1.1)

This sheet invited participants to partake in the research and briefly described the purpose of the research and how the participants were selected to be interviewed. It described how the interview would proceed and how the data would be analysed. It discussed the risks and benefits of being involved and measures that would be undertaken to protect the participant's privacy. It allowed participants up to one week to decide whether or not to participate in the research.

In-depth Interview Protocol (Appendix 1.2)

This protocol contained 17 open-ended questions which formed the framework for a semi-structured, in-depth interview. The questions encouraged participants to talk about the strategic creative process under investigation in their own way, providing their own unique perspective.

Participants Consent Form (Appendix 1.3)

This form provided the researcher with the participant's informed, signed, formal consent to be interviewed. It included the promise that the participant could withdraw from the research at any time prior to completion of the data collection phase and all information provided by them would be destroyed and thereby excluded from the research.

Document Consent Form (Appendix 1.4)

This form contained the written, signed consent of the agency CEO and/or a senior client representative (where necessary) for the researcher to access agency and client documents relevant to the research.

Confidentiality Agreement (Between the Primary Researcher and Participants) (Appendix 1.5)

This agreement confirmed that all spoken, written or visual material supplied to the researcher by the participant would remain confidential to the researcher unless prior permission was gained from the participant allowing the researcher to divulge this information to a third party. This included protecting the anonymity of each participant, their organisation and any of their client's brands being studied, from being identified.

Confidentiality Agreement (Between the Primary Researcher and the Transcriber)
(Appendix 1.6)

This was a formal agreement between the researcher and the transcriber in which the transcriber promised complete confidentiality regarding all work completed for the researcher.

In November and December of 2012 appointments were made by the researcher to meet individually with each of the Chief Executive Officers of each of the five agencies selected for the research. At these meetings the nature and purpose and scope of the research was presented.

As a result of these meetings consent was obtained from each CEO to conduct interviews with selected senior executives from their staff at their agency premises. Consent was also obtained for the researcher to access and study agency proprietary documents and data. In one case (Agency One) this included interviewing an agency client - who also gave consent to be interviewed.

It can be said that all participants from all five agencies were exceptionally helpful in sharing their experiences, their opinions, their convictions and their practices with the researcher. Without exception, participants were clever, smart, insightful and perceptive. Their knowledge and skills, gained from years of perfecting their craft, were impressive. As mentioned above the five agencies were visited initially by the researcher over a period of 27 weeks (6 months) between 12 February and 20 August 2013. 19 interviews were recorded during this time. Agencies One, Four and Five received a further, final visit on 24 March 2014 to validate a generic DSA chart.

The research involved two stages. Stage One involved 'within-case analysis' of the five agencies (reported in Chapter 4) while Stage Two involved 'cross-case analysis' between the five agencies (reported in Chapter 5).

The steps involved in Stage One are listed below:

After each interview had been recorded (using a digital voice recorder), it was downloaded onto the researcher's laptop and then sent electronically to the transcriber. Within 48 hours the transcribed text was returned to the researcher. The researcher then checked the transcription against the audio recording for accuracy. The transcriptions were extremely accurate. Each interview was then edited for extraneous comments.

The construction of the five case studies then commenced. For example, the transcriptions of the six interviews relating to Agency One formed the basis for the Agency One case study. As well, process models - sketched out by individual participants during their interviews - were upgraded to a professional presentation standard and integrated into the case study. All six interviews were then systematically examined, line by line, with the researcher looking for data that addressed each research question. This process was repeated for each agency.

Five case studies were eventually constructed, based on 10 case study topics. The 10 topics incorporated the nine research questions. The topics were as follows: topic one: a list of evidentiary sources relating to each agency/case; topic two: the agency profile; topic three: the role of the Account Planner in the agency (RQ1); topic four: the role of the creative brief in the creative process undertaken by the agency (RQ2); topic five: the role of brands in the agency's creative process (RQ3; this topic also includes four sub-topics relating to the branding process: the extent to which account planners use a brand identity statement when formulating the agency's IMC strategy i.e. RQ3.1; the elements included in any brand identity statement employed by the agency i.e. RQ3.2; the extent to which a brand identity statement is integrated into the creative brief by the agency's account planners i.e. RQ3.3; the extent to which corporate brand identity statements infuse product brand identity statements i.e. RQ3.4); topic six: the agency's opinion concerning the key drivers that integrate marketing communications (RQ4); topic seven: whether the agency undertakes strategic as well as tactical IMC (RQ5); topic eight: the agency's measurement and evaluation of an IMC campaign's effectiveness; topic nine: a Decision System Analysis (DSA) flow chart of the agency's creative process; and finally, topic ten: a concluding comment relating to each case study.

By way of summary: each case is constructed using the following ten topics:

1. List of Evidentiary Sources
2. Agency Profile
3. The Role of the Account Planner in the Agency (RQ1)
4. The Role of the Creative Brief in the Creative Process (RQ2)
5. The Role of Brands in the Creative Process (RQ3; RQ3.1; RQ3.2; RQ3.3; RQ3.4)
6. The Drivers That Integrate Marketing Communications (RQ4)
7. Strategic Versus Tactical integration (RQ5)
8. Measurement and Evaluation of Effectiveness
9. Agency Decision System Analysis Chart
10. Conclusions

The case studies were all systematically constructed around the nine research questions. Where appropriate, responses were related back to issues discussed in the literature review (Chapter 2). A Decision System Analysis chart was prepared for each agency, based on content analyses of participants' interview data. Finally, a summary of insights and conclusions was made and a draft of the completed case study (including the DSA chart) was submitted to the agency principal for verification and approval.

In addition to the agency's DSA chart a new process model emerged from the analysis undertaken for the Agency One case study (refer to Figure 4.5). This model applies particularly to the tactical implementation of IMC.

Information presented in each interview was, wherever possible, cross-checked and validated against documents provided by the participant's agency and/or relevant articles published in the local advertising industry media. Many agency documents served to illustrate comments made by participants (e.g. agency briefing templates).

The second stage of the research analysis (the cross-case analysis) involved comparing cases for similarities and differences, primarily in regard to the research questions. Two new process models emerged out of the cross-case analysis.

The steps involved in cross-case analysis are discussed below:

First, participant responses to the seven topics of interest in each case were reviewed. Next, *representative* responses to each of the seven topics, from each agency, were collated and analysed and conclusions drawn relating to each topic. In all, a total of 27 cross-case conclusions were derived from the research. As part of this process DSA

charts were synthesised into a single draft generic DSA flow chart (Figure 5.2); the Decision System Analysis (DSA) technique is described below. This generic chart was then submitted to principal participants from three representative agencies for confirmation of validity.

Conclusions were drawn and assertions made concerning the meaning of the findings against the back drop of the literature review (Chapter 2). A third IMC process model (Figure 5.4) was presented - generated from the 27 cross-case conclusions.

3.5.4 Data Analysis

Eisenhardt (1989) suggests that a key step in analysing case study data is ‘within-case analysis.’ This is important because of the large volume of data normally associated with case studies:

“Within-case analysis typically involves detailed case study write-ups for each site. These write-ups are often simply pure descriptions, but they are central to the generation of insight because they help researchers to cope early in the analysis process with the often enormous volume of data. However there is no standard format for such analysis... The overall idea is to become intimately familiar with each case as a stand-alone entity. This process allows the unique patterns of each case to emerge before investigators push to generalise patterns across cases.” (p. 540)

A second step in analysing case study data, proposed by Eisenhardt (1989), involves searching for ‘cross-case’ patterns. The rationale behind cross-case comparisons is to force researchers to go beyond initial impressions, thus increasing the likelihood of generating accurate and reliable theory.

The fundamental reason for this study is the current lack of empirical evidence regarding the role of the brand identity construct in the process of implementing IMC, and the lack of empirical research concerning the role of the Account Planner in this process (Section 3.2.1).

The steps taken to analyse the data have been presented in Figure 3.4. In this study, each interview was edited by the researcher upon receipt of each transcript from the transcriber. The editing had the twofold purpose of removing words and comments extraneous to the research questions, and - more importantly - allowing the researcher to immerse himself in the detail of every word and comment made by each participant. This discipline, in turn, created within the researcher, progressively and cumulatively, awareness of and insights into the thoughts of each participant concerning the processes

and practices of their particular agency when creating IMC for their clients' brands. It was fundamental to the research's analysis process.

Creswell (2009) observes that qualitative data analysis involves "collecting open-ended data, based on asking general questions and developing an analysis from the information supplied by participants" (p. 184).

The main form of analysis of the in-depth interviews employed in this study utilised the process of content analysis: systematically and repeatedly trawling through the transcripts of interviews - examining each word, thought, and sentence, in-depth - in an endeavour to discover and collate comments that related to, were relevant to, and provided insights into each of the research questions. Some researchers use mindmaps as part of this process (Burgmann, 2007). Mindmaps were not used in this research, although the technique is similar to the DSA technique described in the next section.

It was also not considered necessary to use NVivo or any other form of computer-assisted qualitative data analysis software in the analysis of this research. In fact, a note of caution has been offered in this regard by Yin (2009), who observes that:

"Under some circumstances, the computerised functions can... be extremely helpful... However, even under the best of circumstances, nearly all scholars express strong caveats about any use of computer assisted tools: you must still be prepared to be the main analyst and to direct the tools; they are the assistant, not you..."

The case study will typically be about complex events and behaviour, occurring within a... complex, real-life context. Unless you convert all of your evidence - including your field notes and the archival documents you might have collected - into the needed textual form, computerised tools cannot readily handle this more diverse array of evidence." (p.129)

Participant responses from within each agency were progressively analysed, collated and classified according to the research questions. This resulted in the production of five separate, unique case studies; one for each of the five agencies in the study - each structured around the research questions. These case studies are presented in Chapter 4.

The second stage in the analysis process involved cross-case analysis; searching for cross-case patterns. Cross-case conclusions regarding each research question were derived as a result of analysing participant responses relevant to each research question across the five cases. These conclusions were foundational to, and formative in, the development of two new IMC process models proffered by the research (Figure 5.2 and Figure 5.4). The results of the study's cross case analysis are presented in Chapter 5.

3.5.4.1 Decision System Analysis

Decision System Analysis (DSA) makes complex phenomena seem simple. It is a conceptually simple technique that maps the process of group decisions over time (Marshall, Bibby & Na, 2014). It is a system akin to Critical Path Method (CPM) and PERT chart (Program Evaluation Review Technique) methodology. Complex decisions made by multiple participants are condensed to flow charts and mapped sequentially. DSA charts are useful from an academic perspective as process models but are also helpful to practitioners, allowing them to analyse decision systems to make them simpler and to improve the decision making environment. DSA also offers an opportunity to standardise separate decision-making case studies through identifying the commonalities in each case, and thus better allowing a comparison and generalisation of cases.

Learning the thoughts, decisions and actions of key advertising and marketing executives as they create IMC is central to this study. This research uses DSA to map the key decisions, actions and interactions of advertising executives and their clients – in five separate case studies – as they create and implement the agency’s creative brief in the overall process of creating IMC for client brands. The role of the brand identity statement in that process is investigated. DSA requires protocol analysis and depth-interviews before the agency/client decision processes are transcribed into flow charts (Na et al. 2009). “Decision system analysis is the attempt to diagram and explain (but not predict) relationships among non-recurring events in a case of study” (Woodside, 2010; p. 15).

DSA is not a recent methodology. Logical flow models have been used to study the decision-making behaviour of an individual or a homogenous group of individuals for over fifty years (for example, Massey & Savvas, 1964). These flow charts have been used to study and simulate pricing decision processes (Howard & Morgenroth, 1968; Morgenroth, 1964), decision-making in marketing organisations (Hulbert, Farley & Howard, 1972), media planning processes (Fleck, 1973), industrial buyer behaviour (Sheth, 1973), marketing information-systems design (Howard, Hulbert & Farley, 1975), supermarket buyer decisions (Montgomery, 1975), marketing decision processes (Capon & Hulbert, 1975), corporate strategic decision making processes (Mintzberg, Raisinghani & Theoret, 1976), advertising agency decisions (Capon & Scammon, 1979), advertising agency creative decision-making processes (Mondroski, Reid & Russell, 1983) and corporate procurement decisions (Vyas & Woodside, 1984; Woodside & Samuel, 1981).

Marshall et al. (2014) comment that most DSA researchers conduct a series of recorded interviews with the decision-making team, that complements their observations:

“These often take the form of protocol analysis, where a respondent is asked to talk through his or her typical decision process. Thus, perhaps, a face-to-face observation of a group meeting will expose the process, the group dynamics and even the outcomes but, when supplemented with individual interviews, motivations and possible variations from the norm may be exposed. Other methods can also help. Documents such as minutes of meetings, formal procedural guidelines and so on can help flesh out interview and observational data.” (p. 214).

Marshall et al. (2014) suggest that a way to minimise the subjective bias common to all interpretive work is to validate the charts by taking the finished flow charts back to the decision-makers and seeking their agreement that the charts do indeed fairly represent the way their joint decisions were made. They also comment:

It is intuitive to depict processes visually in a chart, and the idea is certainly not unique to DSA. Accounting systems and operations research projects commonly use such flow charts to depict the flow of papers, money, responsibilities, contacts, and key performance attainments (p. 215).

Marshall et al. (2014) note that DSA bears a very strong relationship to cognitive mapping in psychology; a process of mapping the mental thoughts of decision makers. A key difference is that in DSA analysis the actions of the decision-makers at each stage of the decision process augment their thoughts and self-statements. As in DSA, in cognitive mapping the thoughts of a single decision-maker are rarely sufficient to represent a group decision so the charts of individuals are often fused together to form a common thought path leading to a particular joint decision.

“Cognitive cartographers attempt to identify cause-and-effect relationships between different cognitive elements and constructs, and represent them in a chart showing which concept will influence another; the links between the ideas can be shown as directional arrows that can carry a signifier such as a positive or negative sign, or even an indicator of the strength of the relationship. This rationale has strong relevance to DSA. For the reader these charts are simple and intuitive to follow, even though they are often very difficult for the researcher to construct.” (Marshall et al. 2014, p. 217)

DSA is used by Na et al. (2009) to study how advertising agency personnel and their clients make marketing communication decisions within the advertising agency context. Along with the studies of Fleck (1973), Capon and Scammon (1979) and Mondroski, Reid and Russell (1983), the Na et al. (2009) study provides a useful precedent for this research. Na et al. (2009) note that “in the advertising area ... few descriptive modelling

studies are available related to client-agency decision processes” (p. 156). The situation has not changed.

After completing the writing-up of each individual case study the researcher proceeded to analyse the procedures and processes reported by agency participants in each case study concerning the creation of IMC strategies for a client’s brand. From the interviews flow charts were developed to describe the decision process in each agency. The DSA chart for each agency decision was thus prepared by the researcher from evidence supplied by interviewees and documentation supplied by the agency (for example; Figure 4.2, Figure 4.3 and Figure 4.4).

DSA maps the process of group decisions over time. Data is gathered in a variety of ways but most often some form of protocol analysis is the primary tool. In this research, agency procedures, conventions, customs and rules of conduct regarding the creation of IMC campaigns were discussed with participants and noted by the researcher. Participants were asked to talk through their typical decision making processes. These comments are collated in each case study under the relevant topics. They are included, for example, in answers to research questions such as RQ1: ‘What is the role of the Account Planner in the agency?’ Also, RQ3.1: ‘To what extent (and how) do account planners use a brand identity statement when formulating IMC strategy?’ and RQ3.3: ‘To what extent is a brand identity statement integrated into the creative brief?’

The complex decisions made by multiple participants were condensed to flow charts and mapped sequentially by the researcher. Each individual stage in the process was identified, as were the decisive roles played by key agency and client executives in that process. A chart represents the actions of all of the people involved in the decision group (Marshall et al. 2014). Constructing such a process map requires an iterative technique, where each individual represented in the decision process is satisfied that his or her actions are correctly reflected in the model. Therefore, after each DSA chart was constructed it was then referred back to the principal agency participant for confirmation by the agency that the diagrams were accurate and valid. Where necessary the charts were adjusted to ensure authenticity. This process contributed to the triangulation of methods of data analysis used in this case study research.

3.5.4.2 Document Analysis

A list of documents obtained from each agency is recorded in Table 3.3. These documents were examined by the researcher to corroborate verbal evidence given by participants and also analysed by the researcher for further insights into the philosophy and practice of the agency being studied.

Document analysis allowed the researcher to cross-check and verify information presented in the interviews conducted for the research. Some documents (e.g. briefing templates) illustrated the information presented by participants. Discrepancies between verbal and written reports were resolved by follow-up discussions with the participants concerned.

In addition, industry media stories relating to the five agencies involved in the research were collected and analysed and incorporated as background data into the respective case studies.

Bryman and Bell (2011) suggest that there are four possible approaches to interpreting documents: qualitative content analysis; semiotics; hermeneutics and historical analysis. They suggest that content analysis is probably the most prevalent approach to the qualitative analysis of documents. Content analysis involves searching out underlying themes in the material being analysed. Content analysis of documentary evidence was used in this research. The document analysis sought to corroborate the verbal evidence obtained from participants and to illustrate proprietary concepts and processes referred to by them.

3.6 Ethical Issues

Throughout all phases of the research process the researcher has been sensitive to ethical considerations; particularly issues regarding consent, anonymity and confidentiality (Creswell, 2007).

The principle of informed consent means that “respective research participants should be given as much information as might be needed to make an informed decision about whether or not they wish to participate in a study” (Bryman & Bell, 2011, p.133). The principle also implies that people should be fully informed about the research process.

Before the research could commence the researcher was required to obtain approval from the Auckland University of Technology Ethics Committee (AUTEK) for the proposed research design. This approval was given on 27 November 2012 (refer to Appendix 1.7). AUTEK required the researcher to advise how the information about the project would be given to participants and how their consent would be obtained and evidenced. The researcher also had to advise how the privacy and confidentiality of participants would be protected and how they would be identified in the final report. As part of the application for ethics approval the researcher had to supply the following documents (which are presented in the Appendix):

1. Participant's information sheet (refer to Appendix 1.1)
2. In-depth interview protocol (refer to Appendix 1.2)
3. Participants consent form (refer to Appendix 1.3)
4. Document consent form (refer to Appendix 1.4)
5. Confidentiality agreement between the researcher and participants (refer to Appendix 1.5)
6. Confidentiality agreement between the researcher and the transcriber (refer to Appendix 1.6)

A number of procedures were implemented by the researcher in order to establish and maintain transparent relations with participants. In November and December of 2012 appointments were made by the researcher to meet individually with each of the CEOs of each of the five agencies selected for the research. At these meetings the nature and purpose and scope of the research was presented. Copies of the participant information sheet were forwarded to the CEOs to forward to their nominated research participants. Before each interview participants were invited to ask any questions of the researcher that they might have concerning the nature, scope, anonymity and confidentiality of the research and the research findings. Every participant was happy to be interviewed and the interviews proceeded.

All names of agencies, participants, clients and brands have been disguised or removed from all data included in the research where this could lead to the disclosure of the agency, client or participants involved. None of the participants were given the names of other agencies participating in this research.

Copies of draft case studies for each agency were forwarded to agency CEOs or their representatives for verification purposes. These studies included each agency's individual DSA charts. Only one agency (Agency Five) required the removal of some proprietary data that they wanted to remain confidential. Otherwise all agencies approved of their case studies.

3.7 Validity and Reliability

According to Yin (2009, p. 40) there are four tests (relevant to case study research) that have been commonly used to establish the quality of any empirical social research. They are:

1. *Construct validity*: identifying correct operational measures for the concepts being studied.
2. *Internal validity*: seeking to establish a causal relationship, whereby certain conditions are believed to lead to other conditions, as distinguished from spurious relationships.
3. *External validity*: defining the domain to which a study's findings can be generalised.
4. *Reliability*: demonstrating that the operations of a study - such as data collection procedures - can be repeated, with the same results.

Yin (2009) suggests that the first test, construct validity, is especially challenging in case study research. He contends that there are three tactics available to increase construct validity when doing case studies. First, the use of 'multiple sources of evidence' during data collection will encourage convergent lines of enquiry. Second, establish 'a chain of evidence', during the data collection process. Third, have the draft case study report reviewed by key informants. The researcher believes that all three of these tactics have been employed in this research.

The second test, internal validity, is of concern for explanatory case studies but not for descriptive or exploratory case studies (Yin, 2009). This study is an exploratory case study.

The third test, external validity, is concerned with the problem of "knowing whether a study's findings are generalisable beyond the immediate case study" (p. 43). Yin (2009) observes that critics typically state that single cases offer a poor base for generalising;

however multiple-case designs have distinct advantages by comparison. The evidence from multiple cases is often considered more compelling, and the overall study is therefore regarded as being more robust (Herriott & Firestone, 1983). The replication logic is analogous to that used in multiple experiments. This study is of a multiple-case design.

The fourth test, reliability, involves aiming to minimise errors and biases in a study. The objective is that “if a later investigator followed the same procedures as described by an earlier investigator and conducted the same case study all over again, the later investigator should arrive at the same findings and conclusions” (Yin, 2009, p. 45). A prerequisite therefore, for reliability, is the need to document the procedures in the case study thoroughly. The guideline to enhanced reliability is, therefore, to conduct the research in such a manner that the procedures could be repeated and the same results achieved by a second researcher. In this research strategies for data collection and analysis have been stated in a way that future researchers should have little difficulty replicating them if required.

Lincoln and Guba (1985) suggest that a crucial technique enhancing the probability that research findings and interpretations will be considered credible and trustworthy is ‘member checking’. This process is described as follows:

Data, analytic categories, interpretations, and conclusions are tested with members of those stakeholding groups from whom the data were originally collected. If the investigator is to be able to purport that his or her reconstructions are recognisable to audience members as adequate representations of their own (and multiple) realities, it is essential that they be given the opportunity to react to them (Lincoln & Guba, 1985, p. 314).

Member checking can be both formal and informal. It provides an opportunity to assess a participant’s intention when providing information, it gives participants an immediate opportunity to correct errors of fact or interpretation, it provides participants with the opportunity to volunteer additional information and it puts participants on record as having said certain things and having agreed to the correctness of the researcher’s recording of them. In addition, copies of research reports may be furnished for member check and comment (Lincoln & Guba, 1985).

In this research there are several instances of member checking. Upon completion of the writing up of each case study (including the DSA chart) the draft case study was

submitted back to the agency concerned for comment and verification that the report was an accurate representation of comments made by participants. Only one amendment was required - to just one of the five case studies; Agency Five requested the removal of a commercially sensitive proprietary model from their case study. Apart from that single amendment, all five case studies were confirmed by respective agency principals as being accurate records of the views expressed by their agency, and an accurate representation of agency processes as depicted in their respective DSA charts.

A further example of member checking involved the construction of the generic DSA map - constructed from the five individual DSA maps (refer to Figure 5.2). The draft generic DSA chart was submitted to principal participants from three representative agencies, and this draft too, was approved as being an accurate representation of generic agency decision-making processes involved in creating IMC campaigns for client brands.

Triangulation is another technique cited by Lincoln and Guba (1985) which is frequently employed by researchers to increase confidence in their research findings. Bryman and Bell (2011) define triangulation as follows:

Triangulation entails using more than one method or source of data in the study of social phenomena. The triangulation metaphor is taken from navigation and military strategy, where it refers to the process whereby multiple reference points are used to locate an object's exact position. The term has been employed somewhat more broadly by Denzin (1970, p. 310) to refer to an approach that uses, 'multiple observers, theoretical perspectives, sources of data, and methodologies', but the emphasis has tended to be on methods of investigation and sources of data (Bryman & Bell, 2011, p. 397).

In this research triangulation has occurred in several different ways within and between cases in the research. Case study data collection allows for different sources of evidence. Within each case in this study there has been triangulation of sources of data. Evidence has been sourced not only from in-depth interviews with multiple participants from each agency, but also from multiple proprietary agency documents and templates relating to the creative process (refer to Table 3.3). In addition, data from the public domain has been referenced to corroborate and support the selection of agencies for the research sample (refer to Section 3.5.1 and Section 3.5.1.2).

Triangulation of findings has also occurred in this research as a result of examining multiple cases. A multiple-case research design is a 'replication' research design (Yin, 2009).

The procedures to replicate this research have been clearly identified, such that the study has the potential be replicated with little difficulty in New Zealand or another national setting.

3.8 Chapter Summary and Conclusions

Chapter 2 presented an examination of the relevant literature and the conceptual basis for this thesis. Chapter 3 has provided a detailed record, or chain of evidence, relating to the methods of data gathering and analysis employed in the research.

The stages in the research have been outlined. Research protocols have been described and discussed in detail, the manner in which the interviews have been undertaken and analysed has been reported in full, the processes whereby the case studies have been constructed and analysed have been reviewed, and measures to ensure the anonymity and confidentiality of participants have been outlined. The validity and reliability of the research has been confirmed.

All six DSA charts were reviewed by principal participants and approved as authentic and valid.

Chapter 4 focuses on within-case analysis and records the results of the data collection and analysis described above. It is presented in the form of five case studies.

Chapter 5 will focus on cross-case analysis.

Chapter 4: Field Research/Within-Case Analysis

Figure 4.1: Structure of Chapter Four

Section	Topic
4.1	Introduction
4.2	Case Study: Agency One
4.3	Case Study: Agency Two
4.4	Case Study: Agency Three
4.5	Case Study: Agency Four
4.6	Case Study: Agency Five
4.7	Chapter Summary and Conclusions

4.1 Introduction

The purpose of this research is to address a gap in the literature concerning the potential role of the brand identity construct in the process of creating IMC (Madhavaram et al. 2005). Accordingly, the research problem is defined as:

What is the role of the brand identity construct in the implementation of IMC by New Zealand advertising agencies?

Within this focus additional attention is given to the strategic role played by agency account planners in this process. Five central research questions guide this inquiry, with four sub-questions:

RQ1: What is the role of the Account Planner in the agency?

RQ2: What is the role of the creative brief in the creative process?

RQ3: What is the role of brands in the creative process?

RQ3.1: To what extent (and how) do account planners use a brand identity statement when formulating IMC strategy?

RQ3.2: What elements (for example: brand name, brand positioning, brand personality, brand values, brand graphics/logo) are included in any brand identity statement employed?

RQ3.3: To what extent is a brand identity statement integrated into the creative brief?

RQ3.4 To what extent does corporate brand identity interact with and infuse product brand identity in brand identity statements used by New Zealand advertising agencies?

RQ4: What are the drivers that integrate marketing communications?

RQ5: To what extent is IMC, as practised by New Zealand advertising agencies, anything more than just ‘tactical integration’?

The empirical phase of this research is presented in two stages. Stage One is presented in Chapter 4 and is a ‘within-case’ analysis of each of the five cases. Stage Two is presented in Chapter 5 and is a ‘cross-case’ analysis, comparing the five cases for similarities and differences.

The five case studies represent a multiple-case study design. Case studies focus on “a bounded situation or system” (Bryman & Bell, 2011, p. 60); in this study five leading New Zealand advertising agencies each represent an individual case. Multiple cases allow the researcher to compare and contrast the findings derived from each case (Chapter 5). The replication therefore enhances the possibility of more compelling evidence, a more robust study and improved theory building (Bryman & Bell, 2011). Perry (1998a) asserts that case study research fits within the critical realism paradigm and is essentially inductive, theory building research. This view is consistent with the stated paradigm for this research; post-positivist critical realism. The unit of analysis in this study is *the branding process involved by a single advertising agency in the creation of IMC campaigns for their clients*. The level of analysis is at the organisational level.

The cases are constructed from 18 semi-structured in-depth interviews of participants from five different New Zealand advertising agencies and one client organisation. All names of agencies, participants, clients and brands are disguised in order to protect the privacy and confidentiality of those involved. Each agency is therefore given a number:

Agency One, Agency Two, Agency Three, Agency Four and Agency Five. Participants are identified by their role within their agency. The Agency One case study utilises six participants while the other four studies utilise three participants each. The difference in the number of participants from Agency One was unplanned and occurred purely as a result of the generous response of the agency Managing Director to the researcher's request for participants. The researcher believes that the response adds depth to the Agency One case study.

Documents were obtained from each agency and analysed for confirmatory evidence of statements made by participants and also for further insights into the philosophy and practice of the agency being studied. Each interview was audio-recorded, transcribed, edited and analysed. Finally, a DSA chart was prepared by the researcher for each agency. These were later collated into a single, generic DSA chart (Chapter 5).

In this thesis each case is constructed using ten topics:

1. List of Evidentiary Sources
2. Agency Profile
3. The Role of the Account Planner in the Agency
4. The Role of the Creative Brief in the Creative Process
5. The Role of Brands in the Creative Process
6. The Drivers That Integrate Marketing Communications
7. Strategic Versus Tactical Integration
8. Measurement and Evaluation of Effectiveness
9. Agency Decision System Analysis Chart
10. Summary and Conclusions

Chapter 4 presents a 'within-case' analysis of each case study.

When multiple cases are chosen, a typical format is to first provide a detailed description of each case and themes within the case, called a *within-case analysis*, followed by a thematic analysis across cases, called a *cross-case analysis* (Cresswell, 2007, p. 75).

The ten topics listed above are addressed in five separate case studies. In this chapter, Sections 4.2 - 4.6 represent the five case studies. A range of conceptual models are introduced throughout the chapter. Section 4.7 concludes Chapter 4.

Each case study will now be discussed.

4.2 Case Study: Agency One

4.2.1 List of Evidentiary Sources: Agency One

For the Agency One case, five senior agency executives and one senior client executive were interviewed by the researcher. The agency executives interviewed were the Managing Director, the Head of Planning, a Group Account Director, the Digital Creative Director and the Operations/Production Director. A client Marketing Manager was also interviewed. Each interview took approximately sixty minutes to complete. They were semi-structured in nature. They were audio-recorded and subsequently transcribed before being edited by the researcher. Each interview was then systematically interrogated for evidence in answer to each of the research questions. Responses were then collated in accordance with the research questions. The six edited transcripts form the basis of this case study.

A number of helpful documents were obtained from Agency One. These included the Creative Process: Teams/Triangles model (Figure 4.2), the Account Planning Process model (Figure 4.3), the Agency Creative Process model (Figure 4.4), the Client Planning Brief template (Appendix 2.1), the Agency Long Brief template (Appendix 2.2), the Agency Short Brief template (Appendix 2.3), and the Agency Post-Campaign Analysis template (Appendix 2.4). As discussed in Section 3.5.4.2 these documents were examined by the researcher to cross-check and verify verbal evidence given by Agency One participants. They were also analysed for additional insights into the philosophy and practice of the agency when developing IMC campaigns for their clients' brands.

4.2.2 Agency One Profile

Agency One is one of the leading multinational creative advertising agencies in New Zealand. It has a roster of major national and international brands amongst its client list and has an enviable reputation for its creative work. It has consistently rated highly in international award competitions such as the Big Won Annual Global Report (www.thebigwon.com) and international industry league tables (refer to Section 3.5.1.2). Agency One has frequently won the New Zealand Agency of the Year award and has a reputation as one of the leading creative agencies in the world. Consequently it is also one of the largest advertising agencies in New Zealand in terms of fees billed and staff employed.

The research questions will now be addressed as they relate to Agency One. To maintain a chain of evidence, each response has been coded to help facilitate the cross-case analysis in Chapter 5. For example, ‘R 1.1’ refers to; ‘Reference: Case 1, Response 1’; ‘R 2.2’ refers to; ‘Reference: Case 2, Response 2’.

4.2.3 The Role of the Account Planner in the Agency

This section addresses RQ1: What is the role of the Account Planner in the agency?

Not all New Zealand creative advertising agencies have account planners. However it is common for leading international award-winning agencies, such as those referred to in Section 3.5.1, to appoint account planners. All the agencies included in this research have account planners.

Agency One has a Planning Department with a minimum of five planners employed. The Head of Planning was interviewed. The Planning Department does the strategic planning across multiple disciplines within the agency. Planners work closely with the account service team, with clients, with the creative team, and with the media team (refer to Figure 2.13) in order to deliver communication work that delivers successful outcomes for their clients. The Head of Planning described his role thus:

“I work closely with the whole business - from the account service team to clients and with the creative team - delivering work that delivers business results.” (Head of Planning) R 1.1

The planner works with senior client-side and agency executives at the highest level in each organisation. This involves an in-depth understanding of the client’s products and brands, the markets in which the brands compete, the consumers who purchase the brands - and why they do so; the products or services that the brands compete against; the trends and new technologies that influence the marketplace; and an overall in-depth understanding of the businesses that they deal with and what differentiates them from their competitors. Much of this data is supplied by the client (Reeve, 1992) but often the planner will initiate their own research to gain consumer insights that will lead to creative strategies that will ultimately resolve a client’s business problem (Fortini-Campbell, 2001; Morrison & Haley, 2003; Steel, 1998):

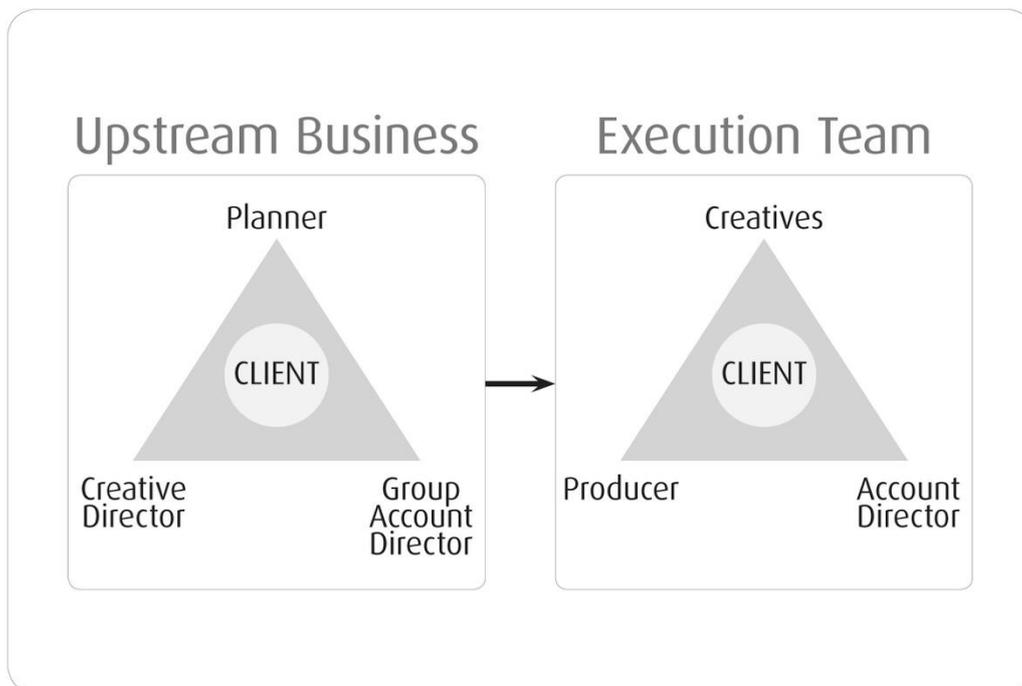
“My job is to take data and turn it into strategies or propositions or briefs that will then act as a springboard for delivering creative strategies that will deliver exceptional business results.” (Head of Planning) R 1.2

Consumer insights are at the heart of this process (Fortini-Campbell, 2001) along with an in-depth understanding of the client’s brand (Baskin, 2001):

“We get into the business and immerse ourselves. That’s the best way to do it. You are in a really good position if you know more about your client’s business than your clients do. Getting into and under the skin of the marketing team, and also the production guys and the sales guys, the logistic and product development guys. It is really important to understand the brands and where they can go. The brand is everything that they do. Every time or place or miniscule touch-point that a customer has with a brand is important and informs their perception of what that brand stands for. So that’s what we are interested in, making sure that people think of the brands in the right way.” (Head of Planning) R 1.3

Agency One employs two triangular leadership teams to monitor the creative process. There is the ‘Upstream Business’ team which includes a senior planner, a senior client service person (or ‘Suit’) - generally a Group Account Director - and a Creative Director. And then there is the ‘Downstream Execution’ team which includes a senior creative, a senior production executive and a client service Account Director (refer to Figure 4.2). Figure 4.2 was prepared from notes supplied by Agency One’s Managing Director.

Figure 4.2: Agency One Creative Process: Teams/Triangles



Source: Agency One

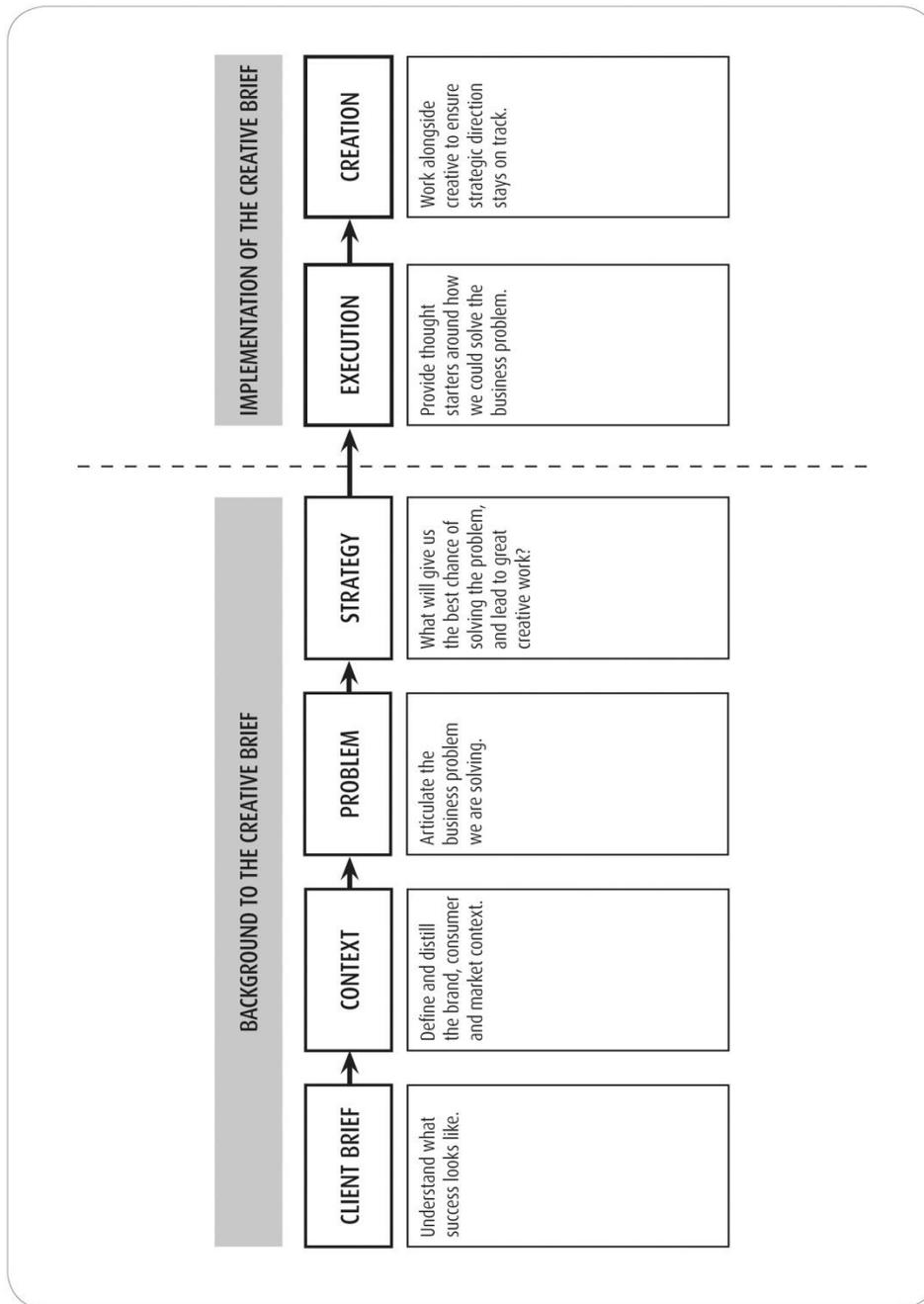
At the start of a campaign, when a client brief comes in (Appendix 2.1: ‘Agency One Client Planning Brief Template’), Agency One’s Upstream Business team will get

together and work out what they understand the client's business problem to be. The planner's role in this is to steer the strategic direction of the discussion, while seeking input and feedback from their creative and account service colleagues (White, 2008).

“When the agency is given a formal client brief the planner will take that brief, digest it and come up with a strategic response - again, with input from creative and client service. Sometimes that strategic response will be in the form of an insight about the consumer or an insight about the market or about the product. Sometimes it may even mean the creation of a new company.” (Group Account Director) R 1.4

Figure 4.3 was prepared by the researcher from notes supplied by Agency One's Head of Planning. It summarises the Head of Planning's view of the broad steps involved in the account planning process. According to Figure 4.3 there are four stages prior to the creation of the creative brief. Firstly, the receipt and clarification of the client brief and the distillation of the client's business problem - with an understanding of what a successful marketing or marketing communications outcome might look like. Secondly, the context of the business problem is studied and insights into the market, the consumer, and the brand are sought by the planner. This is what Wolfe (1994) describes as the stage in the process where planners act as matchmakers between the brand and the consumer, and what Fortini-Campbell (2001) describes as hitting the sweet spot: “You have to find the insight into your consumer and you have to find an insight into your brand. Then you have to bring those two insights together and, as I like to call it, hit the Sweet Spot” (p. vii). Thirdly, the business problem is articulated, and fourthly, a communications strategy is proposed by the planner that will provide the best chance of solving the business problem through the creative work.

Figure 4.3: Agency One Account Planning Process Model



Source: Agency One

The next two stages in the process relate to the creation of the creative brief. Firstly, the creative brief is written up by the planner and then presented to the creative team with thought-starters concerning how the creative work might solve the client’s business problem. In the final stage of the process the planner works alongside the creative team throughout the creative process ensuring that the proposed strategic direction for the brand communications stays on track.

“The Account Planner is the person that needs to understand the client’s business problems. And then, in understanding the client’s business problems, provide a strategy to solve them. And then - off the back of that strategy - we can come up with creative solutions to help solve those business problems.” (Operations/Production Director) R 1.5

“I consider planners to be the glue of the whole process because they are, actually, the one person that tends to touch the process all the way through. Not just do their bit and then walk away.” (Digital Creative Director) R 1.6

The Account Planner plays a vital strategic role in Agency One. As described by the Digital Creative Director they are ‘the glue of the whole process’. They are arguably the most important player in the development of IMC campaigns by the agency (Kelley & Jugenheimer, 2011). All of the roles identified in Table 2.6 are part of the Agency One planner’s job description. In Agency One planners are also known as Brand Strategists (Madhavaram et al. 2005). This reflects the priority focus given by the agency to understanding a client’s brand and the consumer’s relationship to that brand.

Because a focus on brands is central to all marketing communications developed by Agency One it is appropriate to revisit the comments of the Head of Planning noted above:

“It is really important to understand the brands and where they can go. The brand is everything that they do. Every time or place or miniscule touch-point that a customer has with a brand is important and informs their perception of what that brand stands for. So that’s what we are interested in, making sure that people think of the brands in the right way.” (Head of Planning) R 1.7

An important question arising out of the above statement is this: When the Head of Planning refers to ‘the brand’ in his comment does this reference relate to the product brand, the corporate brand - or both? In other words, does he consciously bring to the creative process a strategic approach to IMC or is he just concerned with tactical IMC? It is not apposite to seek an answer to this question at this point in the case study but it will be addressed in Sections 4.2.5 and 4.2.7 below.

It is clear from the above discussion that the function and role of the Account Planner in Agency One is totally consistent with the function and role of account planners depicted in the literature reviewed in Section 2.3.11.2.

4.2.4 The Role of the Creative Brief in the Creative Process

This section addresses RQ2: What is the role of the creative brief in the creative process?

Agency One considers the traditional linear creative process as presented in Table 2.7 as being an over-simplified representation of reality. The creative process is complex and rarely linear. It is interactive with multiple processes often occurring simultaneously. Some of this complexity is captured by Decision System Analysis but even that form of analysis is designed to ‘simplify complex phenomena’ (Marshall et al. 2014). Needless to say, the complexity of the creative process is extremely difficult to conceptualise visually. For Agency One it is imperative that the leadership team of senior client service, planning and creative executives (The Leadership Triangle) work in harmony from the start of the creative process.

“Unless everything is cohesive and you are singing from the same song sheet and everyone is talking openly at the same time, you’re in trouble... It’s an absolutely symbiotic relationship between all three.” (Managing Director) R 1.8

The creative brief is intended to make the process of developing brand communications more efficient and effective (Baskin, 2001). It is a strategic document but should also be inspirational (Moriarty et al. 2009). A good brief serves as a springboard for the creative team to create superior marketing communications. In Agency One the creative brief is:

“A summary of the strategy and a springboard for ideas. Our brief is pretty simple. It’s got four parts to it and four sentences basically, which is really what the Creative Department goes off. And it forces you to distil all of your thinking down into some really crystal clear thoughts.” (Head of Planning) R 1.9

After receiving the client brief, Agency One produces a response (or reverse) brief in which they articulate what they consider the real business problem or opportunity to be.

“The response brief is more often than not a power point presentation which might be just half a dozen slides. Items of interest are distilled from the client’s brief. Questions to be answered include: What is the business problem? What is the consumer insight? How do these two elements connect? What is the role of the brand in all of this? The information is extracted from the client brief and simplified - and if needed, further questions are asked.” (Group Account Director) R 1.10

The response process ends with a statement in the form of a long-form creative brief (Appendix 2.2) or a short-form creative brief (Appendix 2.3). This brief will be presented to the client by the agency, agreed to, and signed off by the client.

“The creative brief is effectively a contract between the client and the agency, in which they both agree on what the business problem is, what the creative insight is and what the budget and timing constraints are.” (Group Account Director) R 1.11

As mentioned above, Agency One has a long-form and a short-form brief. The long-form brief is more extensive and includes background data on the business problem/opportunity and the communications task (including the planner's strategy for solving the business problem), while the short-form brief extensively summarises the data in order to define the problem for the creative team in the most simple and clear way. It answers four one-word questions: Get? Who? To? and By? ('Get' identifies the target audience, 'Who' is all about the consumer insight, 'To' is the desired consumer behaviour change and 'By' is the unique selling proposition). The USP (unique selling proposition) is "a benefit statement that is both unique to the product or service and important to the user. The USP is a promise that consumers will get this unique benefit by using this product only" (Moriarty et al. 2009, p. 365). The USP is a platform for all of a campaign's communications. (For example, Nike's tagline: 'Just Do It')

"The creative brief is the piece of thinking that helps define the problem for the creative team in the most simple and clear way. We have what we call the short-form brief and literally it goes 'Get-Who-To-By' and it works as a paragraph. It is very easy for creatives to go 'Right. I see what I've got to do here'. It's consumer-focused and it links the brand in with the consumer very tightly. The 'who' is very much about the consumer insight. The creative brief is the platform used by the agency to build the creative product - and it's a contract with the client." (Group Account Director) R 1.12

While the client brief is largely about defining the business problem the creative brief represents the agency's strategy for solving it. Therefore the client brief needs to define for the agency what success looks like when it is achieved. What are the outcomes that indicate success? If the client is able to clearly identify what is standing in the way of success then the planner can go away, dig deeper, understand the problem in-depth and then propose the best way to connect with consumers in order to solve it.

"Our planners all have good relationships with the senior clients and we work really closely with the account service teams. We would write most creative briefs - certainly all the big briefs - and if we don't write them we would see them before or approve them before they go into creative." (Head of Planning) R 1.13

Bill Bernbach commented: "At the heart of an effective creative philosophy is the belief that nothing is so powerful as an insight into human nature" (Steel, 1998, p. xiii). Fortini-Campbell (2001) suggests that the planner is primarily an insight-manager. At Agency One, planners spend a lot of time making sure that they understand the context of the situation relating to the client's business problem. Upon receiving the client brief they

explore numerous strategic possibilities and undertake a wide range of research. They look at trends from around the world and compare analyses and then slowly distil this down into the most compelling thought and strategic proposal.

“There is never one right answer. There is always a number of answers that are right strategically but we have to pick the one that is going to lead to the best creative work, because we know that the best creative work will generate better business results. So it has to be right - and a good platform for creative. You can’t just be right.” (Head of Planning) R 1.14

In recent years it has been the major task of planners to prepare the creative brief. In Agency One it is a collaborative process between planners and client service. Their respective roles in this process are discussed below:

“Client (or account) service people deal on a daily basis with the client and have the strongest relationship with the client. Their other role is project management, which is making stuff happen: trafficking things through; making sure I do my job when I need to, so the next person can do their job right; right through to the end of production. In planning you should be slightly detached so you can look on the business as opposed to being in it all the time. You need to be more objective. We can’t be as ensconced as the suits. They need to know everything that’s going on.” (Head of Planning) R 1.15

“My key role is to understand my client’s business as best as anyone in the agency. I am the representative of the client in this building and likewise more often than not, I’m the representative of the agency when I go to the client’s building. So I need to understand their business and I need to understand their business issues, and I need to be talking to them on a regular basis so that I can interpret that and communicate that with my team. I am the client’s advocate here but likewise I’m the agency’s advocate when I’m over there. Account service people have two roles they need to manage.” (Group Account Director) R 1.16

“I will not let a client give these guys (Account Planner, Group Account Director and Creative Director) a brief unless all three and the client are in the room together. You have to have a very senior team, all responsible for a client’s business, and then you have another team for executional excellence... Execution is where things can get lost. I will not let producers have a conversation with creatives unless the account service person is in the room... You need to drip-feed information to the client... and make them feel part of the process. It is an absolute partnership.” (Managing Director) R 1.17

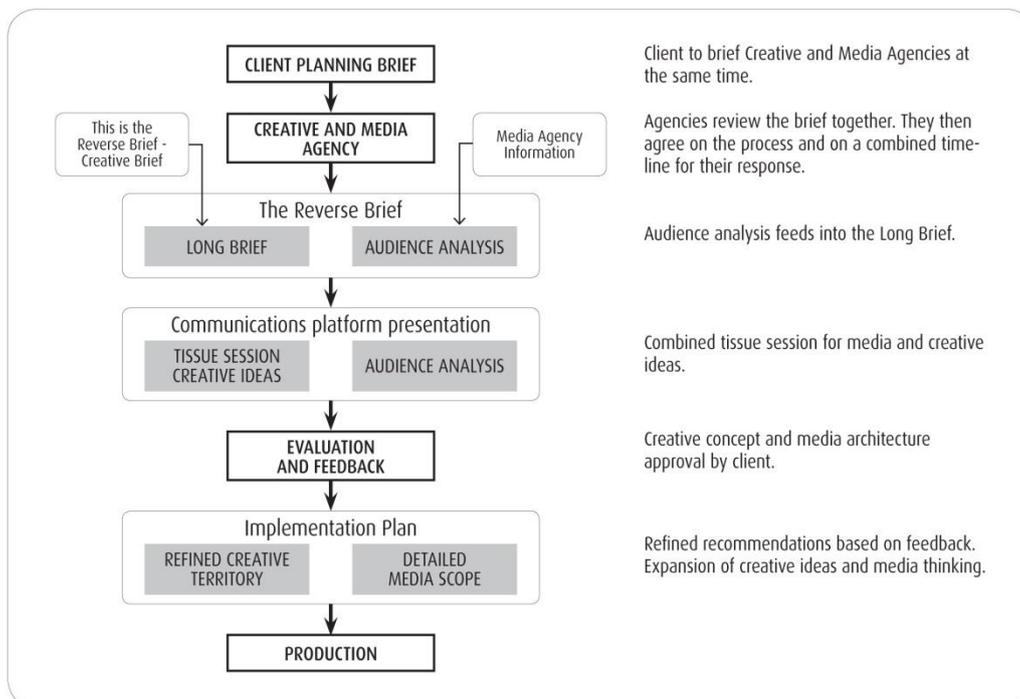
When Agency One undertakes creative work for a client they use a process called a tissue session to present their initial work back to the client. This might be an A3 piece of paper with three visuals and one line on it - and that idea will be presented with five other ideas, and all six ideas will have met all of the criteria in the brief.

“One of the purposes of having a tissue session, where you put multiple ideas up, is that you might try and stretch the brand a little bit in a couple of them. You’re not saying that you’re getting away from the brand; you might try and stretch it - and it’s important to have that because then you can go ‘Well that’s really interesting, and maybe that is right for where we want to go’ - but you wouldn’t want an idea that is completely isolated from the brand.” (Group Account Director) R 1.18

All the ideas are put up on a board for discussion with the client and two proposals will be selected for further development. These two ideas are then expanded further to see how effectively they might fulfil the brief. One may present more avenues to work with than the other; more ways of being expanded into more channels. In the next presentation to the client this one idea will be recommended as having the most potential and being the best value for money. Once this has been approved by the client the planner drops away from having a firm hands-on involvement in the process and the task is taken over by creative, account service and production personnel; a second triangle of people within the agency i.e. The Execution Team.

Figure 4.4 illustrates the Agency One creative process as envisaged by the Group Account Director:

Figure 4.4: Agency One: The Creative Process



Source: Agency One

Figure 4.4 is a flow chart prepared by the researcher from notes supplied by Agency One's Group Account Director. It is, in effect, a Decision System Analysis map (Section 3.5.4.1). Each section of the chart is described by comments on the right. Important concepts in Figure 4.4 - missing from Table 2.3, but alluded to by Morrison & Haley (2003) - include the reverse brief (the basic ideas for the creative brief and media brief) and 'tissue sessions' (where preliminary creative ideas are presented to the client for discussion and evaluation). The role of brands in the creative process is not overtly mentioned in Figure 4.4 but can be assumed (from participants' comments above) to be part of the client brief. The next section addresses this important topic.

It is clear from the above discussion that the role of the creative brief in the creative process employed by Agency One is totally consistent with the literature reviewed in Section 2.3.11.3.

4.2.5 The Role of Brands in the Creative Process

This section addresses RQ3: What is the role of brands in the creative process?

In addition the section seeks to address four sub-questions relating to the role of brands in the creative process (RQ3.1, RQ3.2, RQ3.3 and RQ3.4). These questions will be addressed separately after RQ3 has been addressed.

The brand identity concept is deemed in this thesis to be a marketer's blueprint for a brand (de Chernatony, 2010); a statement of the brand's DNA (Elwood, 2000; Aaker, 1996, 2014). It is of interest to this research because it has the potential to facilitate the integration of a brand's image (Madhavaram et al. 2005). The brand identity statement is an expression of the unique attributes that define a brand and what the brand should stand for in the customer's mind (Aaker, 1996, 2014; de Chernatony, 2010; Kapferer, 2008; Schultz & Schultz, 2004). Luxton, (2008); Madhavaram et al. (2005), and Reid et al. (2005) remain the sole published advocates (to date) who postulate an important role for the brand identity concept in the IMC process. The comments below illustrate the role that brands play in Agency One's creative process:

"Powerful branding is hugely important. It is our job to make a tangible and emotional link between brands and consumers and it's our job to make those brands more interesting for whatever reason. If we can make them more interesting through the communication and solve a business problem then we'll create a conversation. Now as that conversation builds momentum that brand becomes part of popular culture... That's effective communication." (Managing Director) R 1.19

Agency One endorses the fundamental importance of the brand as the cornerstone for all marketing communications undertaken by the agency for client brands.

“There is no communication without the brand. We need to understand what is the brand essence, its personality type and its tone. I think the worst ideas for a brand are when you could cover up the brand and put another one on and it would feel right. It needs to be unique. And that’s where understanding the brand is vitally important. The core personality of the brand needs to be understood. This should be in the client’s brand book.” (Group Account Director) R 1.20

Marketing communications have been described by Keller as “The voice of the brand” (Keller, 2009, p. 141). The ever increasing number of media channels at a marketer’s disposal today allow them to spread their marketing communications across a wide and diverse range of platforms. But as Duncan (2005) observes, brand messages are not all controlled by the company and can originate from anywhere - inside or outside a company, both good and bad messages. Brand messages include “All the information and experiences that impact how customers and other stakeholders perceive a brand” (Duncan, 2005, p. 109) - not just the marketer-controlled marketing communications.

The point here is that the voice of a brand (marketing communications) needs a brand to originate from in the first place. The role of the brand in the marketing communications process is therefore fundamental, by definition. This is acknowledged by Agency One:

“Without a strong brand position and the public’s understanding of that brand then the campaigns that we produce probably wouldn’t be viable - because the public needs to understand where the brand is coming from in order to be able to understand the campaign that we are putting to them.” (Operations/Production Director) R 1.21

In Agency One there is no doubt concerning who takes primary responsibility for the stewardship of a brand:

“Marketing Directors or Marketing Managers own the brand. They live and breathe it. They have to; it’s what they are trained to do. In times of transition our job is to make sure, when we work with anyone who’s new in a position like that, to show them what we’ve been doing with the brand so that they can understand where the brand has been. So if they want to take the brand in another direction they can do so with the right amount of information.” (Digital Creative Director) R 1.22

“The brand management on the client side should ultimately be the brand stewards - but it should be a really symbiotic relationship. With great clients you have that relationship where you both really, intuitively, know what the brand stands for and it’s all about taking it forward. However, the turnover of brand management within clients is quite high and new Marketing Managers will come in and want to put their own mark on things. In that situation the agency, which probably has a more

consistent or longer term relationship with the brand, should be able to play a brand stewardship role in that space and keep things on track.” (Head of Planning) R 1.23

The client Marketing Manager, interviewed for this research, was unequivocal in terms of the importance of a clear and consistent presentation of their brand to consumers. From his point of view it is imperative that the brand makes a connection with consumers and plays a significant role in their lives so that at the point of purchase, where there are many options, a connection is made:

“It is about being very, very clear on what the brand idea is; what the brand is trying to get across, and then being very clear with the agency on what the core idea is about and holding them to that throughout the process. Quite often it is necessary to keep reminding the agency to keep coming back to the brand, because there are times when an agency can run away with an idea and the idea can become almost bigger than the brand.” (Client Marketing Manager) R 1.24

Agency One Head of Planning talks in terms of the ‘purpose of the brand’ being the essence of the brand and the core of all marketing communications for client brands. ‘Brand purpose’ is the answer to the question, “What role does this brand play in the lives of its customers?” A brand’s purpose is its reason for existing. It is the core of its marketing communications and it can work just as well internally (to motivate staff) as it can externally (communicating with customers). It involves intimately understanding the journey that the brand is on and where it has come from; in other words it’s brand story. Some agencies use the term brand manifesto to describe the same concept. Brand purpose determines how a brand should behave on the front line with its customers, with its marketing communications, with its suppliers and with its staff. If the brand purpose is distilled down to a few words then everyone can remember it.

“For example, Vodafone used the words Red, Restless and Rock-solid, to drive everything that they did - from brand personality to tone of voice” (Head of Planning) R 1.25

“Humans are more likely to form relationships with people whose behaviour is consistent. They know how they are going to act in certain situations. On a broader level it is the same with brands. So if you are all over the place people are less likely to form a relationship with you. You need to be consistent in how you behave; so it’s pretty important to have a good understanding of your brand’s tone and personality.” (Head of Planning) R 1.26

Agency One and its clients use a number of expressions of the brand identity concept including brand books, brand guideline manuals and brand manifestos. There is a strong focus within the agency on the brand purpose concept; a means of distilling the brand into

its essential elements. The Managing Director made the following comments in response to the question: “Does your agency or do any of your client companies have proprietary statements or models concerning brand identity, brand DNA, brand footprints, brand onions - or similar concepts?”

“Yes. More often than not. At least 50-60% do; mainly in the FMCG space. They tend to be more global brand businesses who have had a couple of decades of consistent processing of philosophical points of view on how one brings the brands to markets. Our agency does not have a unique generic brand identity statement. A lot of our clients, and I think marketers, understand brand purpose; Why is it that the brand exists? Why does this brand exist in people’s lives? When we’re good we’re spending a lot more time at that level of conversation.” (Managing Director) R 1.27

The client service spokesperson for Agency One endorsed the Managing Director’s comments. In his view it is a strength that the agency does not have its own generic brand identity model and is not limited by such a model. This is because one of the important roles of the planner is to help clients to define their brand. It is the planner’s responsibility to make sure that the client and the agency can all clearly articulate what the brand is about. This includes understanding what is the brand’s distinctive personality; how the brand is different from its competitors; what is the brand’s unique position in the market; what is its essence; what is at the heart of the brand; what does the brand really stand for - and what makes it unique? The Group Account Director believes that there needs to be a core consistency in terms of the essence of the brand in everything that is done. He believes that maintaining the integrity of the brand is the responsibility of everyone in the agency but it is the account service people who really need to own that responsibility. The account service people need to be the guardians of the brand within the agency and to ensure that everyone else is on task.

The Digital Creative Director added the following comment:

“Everyone has a brand book or a brand philosophy. They insist that you read it before you start. It involves getting under the skin of the brand and really getting to know the brand: especially if you haven’t worked on it before. These documents are really helpful for that. I always look at brand guidelines and brand books; they really are done in order to give you a head start. Then it’s up to you to take that and work with it.” (Digital Creative Director) R 1.28

A brand book is typically around 20 pages in length (Digital Creative Director). This is where the core elements of the brand’s identity are spelt out. There are many different ways to express a brand’s identity but typically there will be statements concerning the

brand's name, its story, its purpose, its positioning, its personality, its core values, its essence and a reference to graphics and logo. The brand book also looks at competitive brands. What are the key elements of the competitor's brand? What is their positioning? What do they stand for visually? How do they present themselves?

"We have a brand book. The brand book talks to brand standards. It talks to the way the brand is presented visually; the way the brand is presented on packaging; how the logo is presented. It is similar to books I've used for previous brands and companies. It starts with the brand idea and the personality of the brand; talks about the brand values and all of those kind of things - right through to a brand manifesto. It is a very clear statement as to what the brand is, what the product is about, and what we want our consumers to see and believe. We refer to it often. The brand manifesto is actually sitting on my wall just behind my computer! From a client's perspective this is where the brand starts; what the brand stands for - and any expression through marketing communications, or whatever, needs to be consistent with that brand statement."
(Client Marketing Manager) R 1.29

Brand guidelines can typically run to 100 pages in length (Operations/Production Director; Wheeler & Katz, 2011). This is because they have to demonstrate how the brand will look across every element of any campaign that is produced. In Agency One copies of the brand book and the brand guidelines are distributed liberally throughout the agency and throughout the client organisation. A copy will usually exist on the computer server as well.

In Agency One it is a frequent practice to write brand manifestos (akin to a short-form brief) for a brand, based on the brand book. These are single page statements, concisely articulating what the brand stands for. For example, "I am bold; I am brilliantly simple and I am a leader". Quite often these manifestos will be turned into posters and be put up in clients' offices.

The four RQ3 sub-questions will now be addressed:

RQ3.1: To what extent (and how) do account planners use a brand identity statement when formulating IMC strategy?

In the discussion above it is clear that brand identity statements in the form of brand books, brand guidelines and brand manifestos are commonly used by Agency One clients to inform the agency of the nature and purpose of their brands. Sometimes these are supplied by the client and sometimes they are created for the client by the agency. This practice is totally consistent with the literature reviewed in Section 2.3.9.

“A lot of clients have brand books with statements of all the things that the brand stands for; the values, the persona, the positioning - things like that. It normally comes in as its own brief. Brand books are quite often their own briefs. We have just produced one for a new client - and charged them a lot of money for it too. There is a lot of thinking behind it, defining a brand. In developing the brand book we get access to the brand and it then becomes the brand bible for us as well as the client. A lot of the creation of the brand book comes from the planners; the writing comes from the planners. We take the brand book and then turn it into brand guidelines. Quite often at the beginning of the process we write ourselves a brand manifesto. It is literally a one pager with a few words which perfectly articulate what the brand stands for.” (Operations/Production Director) R 1.30

RQ3.2: What elements (for example: brand name, brand positioning, brand personality, brand values, brand graphics/logo) are included in any brand identity statement employed?

A text analysis of all Agency One participants’ responses was undertaken to determine what elements might be included in brand identity statements employed by the agency. All responses were closely examined. The analysis revealed the following elements: *brand name, brand personality, brand purpose, brand values, brand tone/voice, brand positioning, brand idea, brand essence, brand story, brand graphics and brand logo* R 1.31

RQ3.3: To what extent is a brand identity statement integrated into the creative brief?

A number of responses, recorded above, suggest that a brand identity statement in the form of a brand book or a brand manifesto normally accompanies a client brief to Agency One - in order to inform the preparation of a creative brief. On occasions Agency One will create a brand book, a brand manifesto and a brand guidelines manual for a client. In Agency One these brand identity statements are considered fundamental to the creative process. A review of the following participant responses supports this contention:

“Everyone has a brand book or a brand philosophy. They insist that you read it before you start. It involves getting under the skin of the brand and really getting to know the brand.” (Digital Creative Director) R 1.32

“We have a brand book. The brand book talks to brand standards. It is similar to books I’ve used for previous brands and companies. It starts with the brand idea and the personality of the brand; talks about the brand values and all those kind of things - right through to a brand manifesto. It is a very clear statement as to what the brand is, what the product is about, and what we want our consumers to see and believe. We refer to it often.” (Client Marketing Manager) R 1.33

“The brand manifesto is actually sitting on my wall just behind my computer! From a client’s perspective this is where the brand starts; what the brand stands for - and any expression through marketing communications, or whatever, needs to be consistent with that brand statement.” (Client Marketing Manager) R 1.34

“A lot of clients have brand books with statements of all the things that the brand stands for; the values, the persona, the positioning - things like that. We take the brand book and then turn it into brand guidelines. Quite often at the beginning of the process we write ourselves a brand manifesto. It is literally a one pager with a few words which perfectly articulates what the brand stands for.” (Operations/Production Director) R 1.35

For Agency One and its clients the creative campaign process starts with a comprehensive understanding of the client’s brand. This knowledge is contained in a brand book or is more succinctly expressed in a brand manifesto. The Agency One ‘Client Planning Brief Template’ (Appendix 2.1) makes reference to the brand in the section ‘What key insights (into the product/brand) do we have that will help?’ and the ‘Long Brief Template’ (Appendix 2.2) includes a section ‘What will the brand propose?’

The client Marketing Manager’s comment sums up this section: “The brand manifesto: from a client’s perspective this is ... what the brand stands for - and any expression through marketing communications, or whatever, needs to be consistent with that brand statement.”

RQ3.4 To what extent does corporate brand identity interact with and infuse product brand identity in brand identity statements used by New Zealand advertising agencies?

The answer to this question is not clear from responses recorded by Agency One participants. The fundamental importance of the brand to all marketing communications is clear. Determining the integration of and interaction between the corporate brand identity and the product brand identity is less clear from these responses. It can be demonstrated from Agency One participant responses that brand books invariably contain reference to important elements of the corporate brand: the brand name; the brand story; the brand vision, mission and purpose; corporate brand positioning; core corporate brand values, and corporate brand personality. It can be argued therefore that a brand book is in effect a *corporate* brand identity statement. In section 2.3.7 Schultz and Kitchen (2000) are cited suggesting that the corporate brand is “the central core or fulcrum that gives an overall sense of meaning, identity, strategy, and dynamic thrust to the basketful of

individual brands within its portfolio” (p. 56). This description could equally describe the role of a brand book in Agency One.

As noted in Section 2.3.7 corporate brands and product brands are inextricably intertwined. Product brands must embrace the central, non-negotiable values of the corporate brand (de Chernatony, 2010). Corporate brands project the core values of a corporation which represent an informal but powerful promise between the organisation behind the brand and its customers and other stakeholders (Kitchen et al. 2013).

In terms of the corporate brand’s core values, its vision, its mission and its history - the corporate brand likely interacts with and infuses the product brand in Agency One practice. This occurs when Agency One personnel integrate the elements presented in the brand book or brand manifesto into the creative brief - in the process of creating IMC brand campaigns for their clients.

This practice is totally consistent with the literature reviewed in Section 2.3.7.

4.2.6 The Drivers That Integrate Marketing Communications

This section addresses RQ4: What are the drivers that integrate marketing communications?

It is clear from the above discussion that the inclusion of key elements of a brand’s identity into the creative brief is a prerequisite for creating IMC by Agency One. All Agency One participants were unanimous in their opinion that a consistent presentation of the brand in terms of brand persona, tone of voice, values, positioning and graphics is essential for effective IMC across all media.

“The process starts with an idea that will, hopefully, work across the right channels and deliver a business result. It starts with the idea and the core thought and then it gets expanded and we use the right channels to connect with the customer in the right way. It is very important that the idea is consistent with the brand persona and those elements that sum up the brand. The benefit of IMC is a consistent perception of a brand or a product or a service. It is synergy, obviously. The sum of the parts should be greater than the individual parts.” (Head of Planning) R 1.36

According to Agency One participants, brand identity is the cornerstone of all integrated marketing communications and is the fundamental driver of the IMC creative process. A brand’s DNA must be present in all marketing communications that relate to the brand -

and a brand identity statement is the key to the integration of all those elements into planned brand communications.

A second driver of IMC is implicit in the comments of Agency One's Head of Planning, immediately above - the notion of a big idea. The creation of big ideas has been the unique domain of creative advertising agencies for over 100 years. The creation of ideas that effectively connect a brand with a prospective customer, that engage that prospect with the brand in a positive and memorable way and lead to a behaviour change or the purchase of a product or service represented by the brand - that is the goal of advertising, and the product of all good creative advertising agencies.

“Integrated marketing communications is how you take your brand into your consumers’ world. We start with a big idea. We identify who our target audience is, and what behaviours we would like to change. Then it’s about putting yourself into their world in a way that connects with them along a whole bunch of different touch points... Our consumers’ world is changing all the time, and it’s about understanding that world and putting yourself in that space. We are very strict on how we judge ideas against our brand. We have strict criteria and the ideas are based very tightly on who we are as a brand. You just get a big idea and you see where it takes you. Our media agency is very good at progressing big ideas and they are usually involved very early in the process as well.” (Client Marketing Manager) R 1.37

In 1983 Ogilvy wrote, “Unless your advertising is based on a big idea, it will pass like a ship in the night” (Ogilvy, 1983, p. 16). Big ideas are fresh and provocative ideas that hold the audience’s attention; they stimulate the mind and stir the emotions. They are simple and easy to understand. Ogilvy (1983, p. 16) declares, “A big idea could be used for 30 years”. The function of creative advertising agencies is to produce creative ideas that help solve business problems and sell more product.

However, some advertising executives dispute the concept of a ‘big’ idea:

“There is no such thing as a ‘big’ idea - just an idea. Everything starts with an idea and has to be idea-driven. It must be disruptive and it must be different; it must be interesting; it must be engaging and it should entertain people.” (Managing Director) R 1.38

In the Managing Director’s opinion Nike do this better than anyone. “They are the person at the dinner party that everyone wants to sit next to.”

Saatchi & Saatchi are on record as stating, “The thing that integrates everything is the big idea” (BBR Saatchi & Saatchi, 2012). The big idea - or the ‘right’ big idea, as one

participant expressed it - runs through all elements of a campaign. It unifies and integrates a campaign across all media channels.

The Head of Planning observes that it is the role of creatives to generate big ideas that deliver on strategy and provide positive business results. In his opinion there is nothing easier than killing an idea when it is first generated. At this stage of the process it is like a new-born foal or a new butterfly coming out of a cocoon. It is easy to crush it because it has no strength at all. But if you nurture it and grow it then it can become something amazing. It is his opinion that it takes a significant level of trust between a client and an agency to do that. In fact, it is hard for any agency to do good work without a good relationship with their client. The Head of Planning also takes the view that the *execution* of the idea is also extremely important. If the idea is not executed well it will fail.

Agency One's client service spokesperson's response to the question, "What happens when the big idea ignores the brand?" follows:

"I'm sure we've presented ideas before when we got wrapped up in the amazingness of the idea - and perhaps it was an idea that could have been done by a couple of other brands. And if these ideas ever make it to market it's a huge mistake because the brief needs to live and breathe the unique brand that we are promoting. The Upstream Business Triangle all need to understand the brand." (Group Account Director) R 1.39

At Agency One a big idea can come from anywhere - but it is normally the creatives who come up with it. It is a second major driver of integration in the IMC creative process.

A third driver - or 'centre of integration' - of a brand's IMC can also be implied from responses by Agency One's senior executives. The third driver is the consumer - usually described as the target audience (or individual). All marketing communications are focused on engaging the target audience through multiple media consumption touch-points. Media consumption patterns differ by target audience. There is a significant difference in the media consumption behaviour of baby boomers and their offspring. There is even a significant difference between generations X and Y and Millennials (Moriarty et al. 2009, p. 136). The penchant of baby boomers to watch television and read newspapers and magazines is not matched to the same extent by their offspring. The opposite is true when it comes to engagement with social media. A misdiagnosis of the target audience's media consumption behaviour can lead to ineffective marketing communications and the waste of a lot of money. There is little to be gained by

advertising on television when the target audience is not watching. Comments from Agency One executives concur with this view:

“Consumers are engaging with multiple channels - often at the same time - whether deliberately or not. And it’s very hard to just rely on one medium to communicate a message - particularly if you want to be part of their world and part of what’s interesting. I think integrating is about integration in terms of their world and reaching them through multiple touch points, where it’s relevant. You can dial-up the digital side with what happens on the website; maybe television; maybe a stunt; and then you start really surrounding the consumer and being integrated into their landscape.” (Group Account Director) R 1.40

Agency One’s Operations/Production Director summed up this perspective succinctly:

“I would define IMC as ‘Having a really good understanding of where your consumer is and having the nous to fill up the channels that surround them in a correct way’ ... ‘Integrated’ to me is: we know where the consumer is; we know that they have a mobile phone in their hand while they are catching a bus on the way to University, for example. So integrating communications to me is actually having an integrated vision about how we are going to communicate to those people, and it’s nearly media agnostic - if you know what I mean. So the ideal place to be is in their hands; it’s in the bus stops; it’s on the back seats of the buses, and then it’s in their timetables that they get sent, for instance.” (Operations/Production Director) R 1.41

At Agency One the idea that integrated communications will be brand and idea consistent is a given. It is a fundamental assumption that all communications will be consistent. The bigger challenge is channel planning around the consumer. It is here that the consumer, once again, becomes the focal point and the integrating centre of all marketing communications. At Agency One planned marketing communications are all integrated around the consumer. In this way they become relevant and effective.

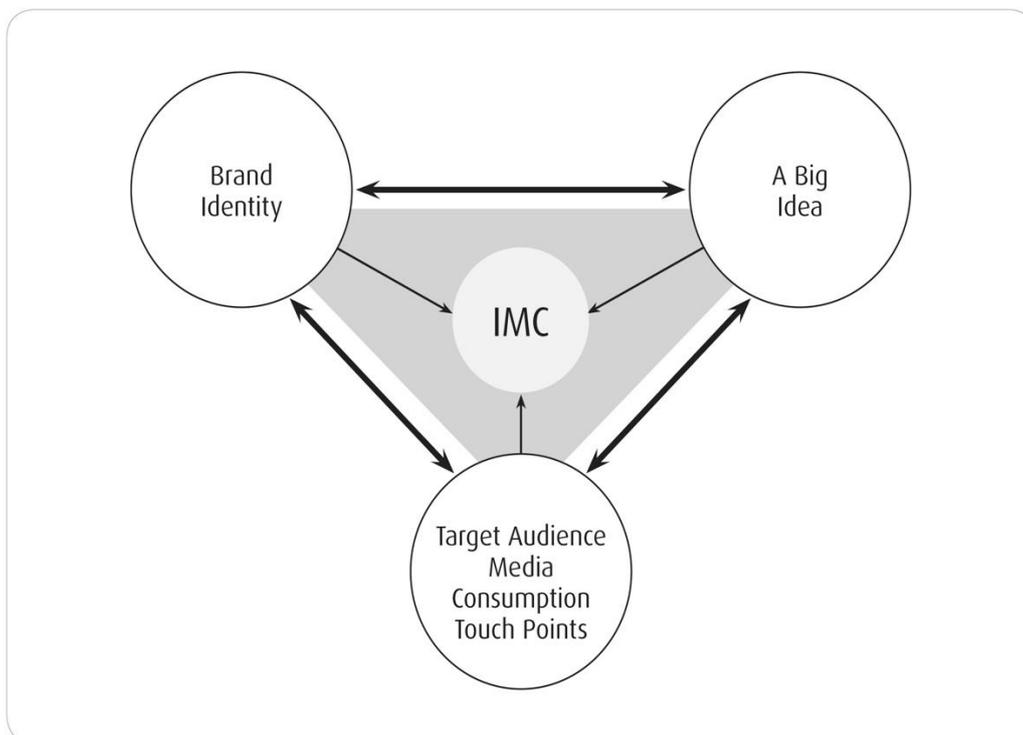
From the above discussions with Agency One participants it can be inferred that there are three primary drivers in the process of creating IMC in Agency One: a brand identity statement, a big idea and an understanding of the target audience’s media consumption behaviour. These three drivers are presented as an interactive process model in Figure 4.5; a process in which the three aforementioned drivers interact to co-create IMC.

First, there is a brand identity statement in some form; for example, a brand book - or a brand manifesto - and a brand guidelines manual. This statement summarises the key elements that characterise the brand and make it unique. It is the reference point for all brand communications. All brand communications must be consistent with and true to these core elements (i.e. brand values, brand personality and brand positioning).

Next, there is a big idea. Duncan (2005) discusses the big idea as part of Step 4 (marketing communications strategies and tactics) in his ‘Zero-based campaign planning’ model (refer to Figure 2.7): “The big idea synthesises the purposes of the strategy... and contributes consistency to the various brand messages” (p. 291). The big idea is the creative agency’s major contribution to brand communications.

Third, there is the identification of the target audience’s media consumption behaviour and touch points - what media does the target audience consume? This is similar to Step 3 in Schultz and Schultz’s (2004) model (refer to Figure 2.6). The agency’s choice of media for a campaign is determined by the target audience’s media consumption behaviour in a given context. The choice of media is dependent on understanding this behaviour and the media subsequently employed by the agency is integrated by this focus. This is the third driver, or centre, of integration of a campaign’s marketing communications.

Figure 4.5: The Three Drivers of Integration That Co-create Integrated Marketing Communications (IMC)



Source: Developed for this research

Agency One participants unanimously contend that integrated brand/marketing communications typically fail when reference to a brand’s identity is weak or non-

existent. Similarly, Agency One participants maintain that integrated brand/marketing communications will fail when the big idea is disconnected from the core brand elements or brand identity. A lack of consistency or fit between the brand persona, brand values, brand positioning and the big idea will result in confusion rather than synergy.

Finally, it has been long established (Rossiter & Percy, 1987) that marketing communications will fail when the media strategy fails to understand the target audience's media consumption behaviour. Agency One participants believe this: "Integrating is about integration in terms of their world and reaching them through multiple touch points - where it's relevant" (Group Account Director).

Figure 4.5 proposes that all three drivers interact with each other and are in turn influenced by each other. In addition, the three drivers work in unison to *co-create* IMC (Muscroft & Needham, 2011). DNA from each driver is present, evident and integrated into all planned messages consistently, thus providing a basis for positive conversations with consumers.

Figure 4.5 will be evaluated further in the remaining case studies.

4.2.7 Strategic Versus Tactical Integration

This section addresses RQ5: To what extent is IMC, as practised by New Zealand advertising agencies, anything more than just 'tactical integration'?

Kitchen and Schultz (1999) found that awareness and understanding of the IMC concept, was widespread amongst senior New Zealand advertising agency executives but there was little evidence to suggest that their understanding of the concept had progressed beyond the 'one sight, one sound', 'inside-out' mentality. In addition, Eagle et al. (1999) when comparing the perception of clients with those of senior advertising agency executives at the time found that there was strong agreement between them that "the idea of presenting 'one voice' and 'one brand personality' will increase in importance" (p. 117).

A follow-up study by Eagle and Kitchen (2000b) found that respondents agreed that IMC is a valuable concept and a fundamental change in the thinking and practice of marketing communications - but was still in an emergent phase. Agency respondents identified IMC as "an effective means of achieving consistency in brand communications" (p. 675). They also indicated that success in achieving this goal related to the development of 'brand

blueprints' - key guidelines and principles fundamentally important in the process of building brands.

A further study of IMC in New Zealand advertising agencies was presented by Eagle and Kitchen (2004). This study looked for any evidence of development in the understanding and implementation of the IMC paradigm by respondents since the earlier studies. The authors noted that New Zealand's uptake of IMC had increased rapidly since their 1999 study but the focus remained on tactical rather than strategic factors. There was no evidence that organisations were actively seeking to listen to their customers or to utilise databases to identify, target and measure the responses of specific market segments. New Zealand agencies were anchored at Stage 1 in the Schultz and Kitchen (2000a) 'Stages in IMC Development' model.

The most recent study, by Eagle, Kitchen and Bulmer (2007), found that agencies appeared to be content with the tactical coordination of marketing communications. This was identical to the conclusion arrived at in Eagle and Kitchen's 2004 study.

Has anything changed? Since 2007 the account planning function has been adopted by most of the larger New Zealand advertising agencies and is now an important part of the agency IMC planning process. This development may have led to New Zealand advertising agencies embracing a more strategic approach to IMC than was the case described by Eagle et al. 2007. As has been noted above, account planners are also called brand strategists (Madhavaram et al. 2005); charged with strategically aligning the brand with customers and prospects in a two-way conversation that has as its goal the building of positive, long-term relationships between the two. This is 'outside-in' thinking; a fundamental tenet of IMC.

Does the central role played by brand books and brand manifestos in Agency One indicate a more strategic approach toward the implementation of IMC by Agency One? If a brand book can be considered to be a corporate brand identity statement, then the answer to the question is 'yes'.

Is Agency One content to deliver marketing communications that could be described as 'co-ordinated luggage'; 'inside-out' thinking; same-look, same-sound; basic tactical message integration? Responses from participants would suggest that this is not the case. In fact the strategic role played by account planners in the IMC creative process in

Agency One would suggest that the agency and its clients are committed to an ongoing, 'outside-in' dialogue and conversation with customers, prospects and other stakeholders.

Do Agency One's clients have a single IMC coordinator, responsible for the strategic integration of all of the client's marketing communications and who is the chief guardian of the client's brand? Although only one of Agency One's clients was interviewed it was clear that this client's marketing communications were strategically driven by reference to the corporate brand and although the client participant was a senior marketing manager (not the CMO) it can be assumed from his comments that in his organisation the Marketing Director took full responsibility for all IMC messages delivered on behalf of the organisation.

Do Agency One's clients operate fully integrated, cross functional organisations where senior management foster and model a culture based on a well-defined purpose and clearly articulated core values? And do employees of Agency One clients have an accurate understanding of their corporate brand and do they see themselves as ambassadors for that brand in their interaction with all other stakeholders? The answers to these questions, based on the cumulative responses of all six participants, is a qualified 'yes' in that they are implied by participant responses - but top client executives (CEOs , CFOs, COOs and CMOs) and representative employees were not interviewed for this research so no conclusive answer is possible from this case.

It is clear from this research that Agency One is not anchored at Stage 1 of Schultz and Kitchen's (2000a) Four Stage IMC Model (R 1.42). The agency also meets the criteria for Stage 2 of their model. The relevance of stages three and four of the model to advertising agencies is minimal, given that the model is designed primarily to monitor marketing organisations. However, because it has been referred to in earlier studies of New Zealand advertising agencies by Kitchen, Eagle and associates it has also been referred to in this study.

4.2.8 Measurement and Evaluation of Effectiveness

It has been noted above, in Section 2.3.12, that the measurement and evaluation of the effectiveness of IMC campaigns can be challenging (Duncan 2005; Duncan & Moriarty, 1997; Eagle & Kitchen, 2000b, 2004; Eagle et al. 1999, 2007; Kitchen & Schultz, 1997, 1999; Schultz & Kitchen, 1997).

Eagle et al. (2015, p. 367) contend that:

The analysis of the effectiveness of an integrated marketing campaign focuses primarily upon the degree to which the objectives of that campaign have been achieved. These objectives are not necessarily related specifically to increases in sales and can take a variety of forms that do not necessarily relate directly to quantifiable sales figures (for example, ‘improved levels of prompted/unprompted brand recognition’).

Agency One uses a ‘Post Campaign Analysis’ template (Appendix 2.4). In support of Eagle et al’s contention above, two of the central questions in the template ask: ‘What were the business and communication objectives?’ and ‘Did (the campaign) achieve our objectives?’

Agency One’s Group Account Director made the following comments:

“One thing that the industry in New Zealand could do better and one thing that we are putting pressure on ourselves to do, is to avoid the ‘launch and leave’ mentality. Some money needs to be held back until after the campaign has hit the market and the questions then need to be asked, ‘what’s engaging and what needs to be changed?’ R 1.43

Brand tracking is easy to do. Ad tracking is often TV-related. Research companies do it for websites and things like that but most often it’s in regards to a television ad only. The research companies will do an ad track and you stack that up against previous ads that you’ve done and New Zealand norms, and they track things like engagement and enjoyment and whether it’s distinctive and how ownable it is for the brand, and all those things. R 1.44

We are not huge fans of pretesting creative ideas but if clients want to do it we’ll do it. But our strong recommendation is, ‘don’t let the pretesting kill the idea’”(Group Account Director) R 1.45

The above views were confirmed by the Head of Planning:

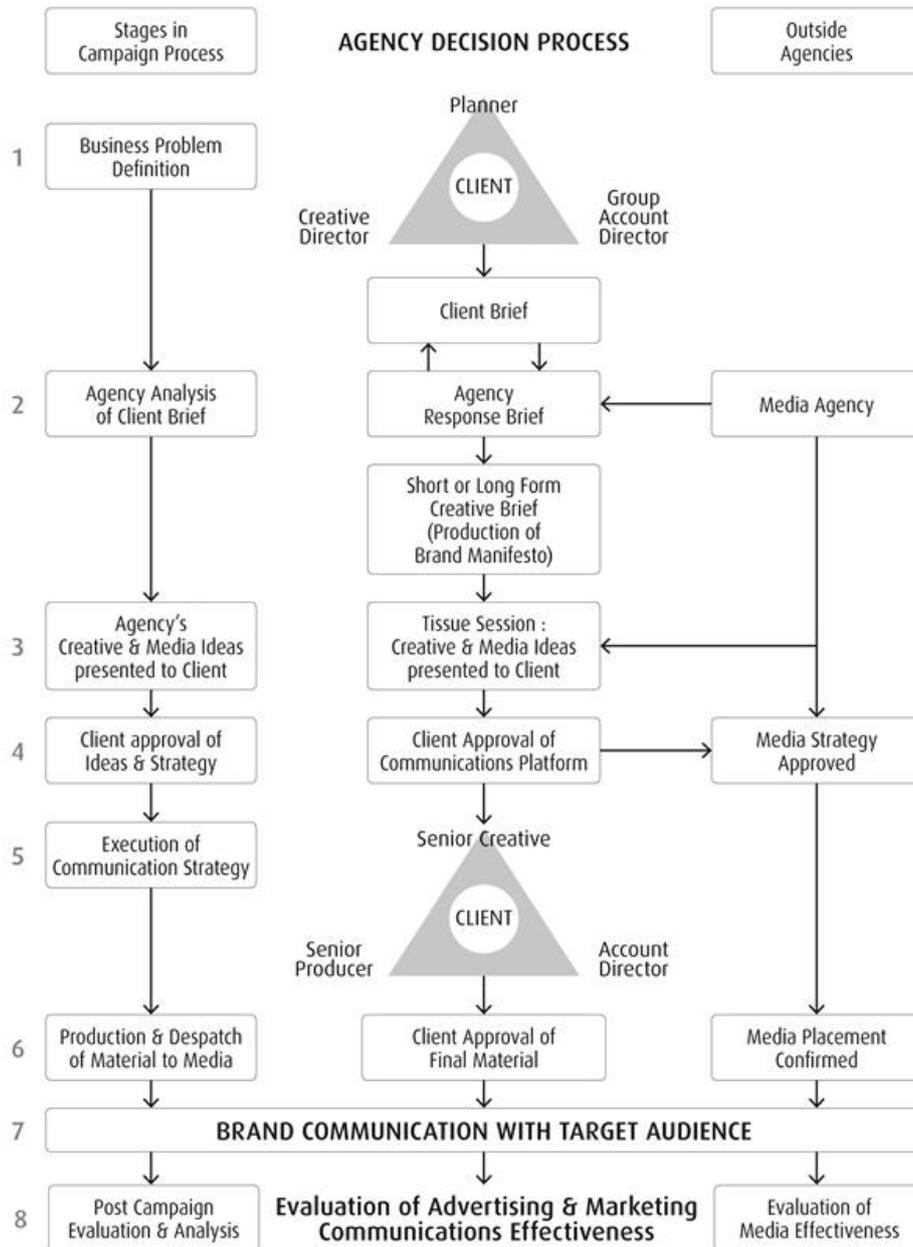
“We track stuff in social media - to work out how much conversation is being generated and where we should be fanning the fires. And we do post-campaign analysis. It’s pretty standard after most campaigns. We track whatever objectives were set at the start of the campaign but largely we track changes to market share, brand health, consideration, preference and revenue. We are all about solving business problems using creativity. But you can’t ever do good work without a good client.” (Head of Planning) R 1.46

It is clear from the above comments that Agency One’s post-campaign effectiveness measures and analysis are consistent with the literature reviewed in Section 2.3.12.

A DSA chart for Agency One will now be presented.

4.2.9 Summary Statement: Agency One Decision System Analysis

Figure 4.6: Agency One: Brand Campaign Creative Process



Source: Developed for this research

Figure 4.6 is a DSA chart that models the key decision making process undertaken by Agency One in the development of a new IMC campaign for a client brand.

The process starts with the definition of the client's business problem. It is a problem that the client believes marketing communications can solve (that is why they have engaged the agency and not some other service provider). The agency is charged with proposing a marketing communications strategy that will solve the problem - and part of the client brief is to describe what success will look like. This is important if the post-campaign analysis of effectiveness is to be meaningful or relevant.

Agency One's relationships with its clients aspire to be collegial, collaborative and highly interactive. The agency sees itself, in many ways, as an extension of the client's marketing team but with a degree of independence that ensures objectivity when providing advice and recommendations. To this end the agency's senior executive team, a triad comprising a Group Account Director, a planner and a Creative Director, are intimately involved with the client - even in the production of the client brief. The fundamental role of the client brief is to define the client's business problem and to contextualise it in terms of the market the client's brand competes in, the financial parameters and budget that the agency needs to operate within and the timeframe for completion of the task. The client brief is normally accompanied by a brand book and a brand guidelines manual.

The agency's response to the client brief takes the form of a response brief (or reverse brief). The Account Planner plays an important role in preparing this response. The planner will normally undertake a wide range of research activities seeking to gain a consumer, product or behavioural insight that will lead to a strategic recommendation that will (hopefully) solve the client's business problem. The media agency (and perhaps other specialist agencies) are also involved in contributing to this response brief. The most compelling recommendation is presented to the client. The client's approval of the agency's strategy leads to the production of a short-form or a long-form creative brief by the Account Planner in collaboration with the Group Account Director. Included in this brief will be a brand identity statement in some form; usually in the form of a brand manifesto.

The creative and media teams are duly briefed by the Account Planner and Group Account Director and are then despatched to come up with creative and media ideas and strategies, in line with the brief. This is when a big idea (or the right idea) is born or confirmed - normally by creatives, but sometimes by media planners. In Agency One the

best creative ideas are then presented to the client in a process called a tissue session. A range of ideas will be discussed by the client and the agency at this tissue session and two proposals will be selected for further development. The best one will later be presented to the client by the agency and will normally gain client approval to proceed to production. At the same time a media strategy for the campaign will be presented to the client and will generally be approved for implementation.

From this point the planner steps back from a hands-on involvement in the process and the task is taken over by a second triad of executives; a senior creative, an Account Director and a senior production person. This team is responsible for the execution of the communication strategy. Similarly, in the media agency, media placements for the proposed brand communications are secured by media buyers - under the supervision of channel planners.

Creative material is produced and approved by the client and then despatched to the designated media vehicles. The marketing communications then appear in various media (including, invariably, at the retail point of sale). The target audience is (hopefully) positively engaged and responds accordingly.

The final act in the process is the post-campaign evaluation of the campaign's effectiveness. Communication outcomes are measured against the goals specified in the client brief; media effectiveness is measured against the goals set in the media strategy; behavioural change is measured in terms of changes in consumer attitudes toward the brand and changes in purchase behaviour. Return on investment is measured in terms of profits made or losses incurred.

The above discussion is consistent with and illustrative of the DSA literature reviewed in Section 3.5.4.1.

4.2.10 Agency One: Conclusions

This case study has sought answers to the nine research questions presented in Chapter 3. Responses from the six participants have been compiled topically, in line with the research questions, and are illustrated by three process models supplied by participants (Figures 4.2, 4.3 and 4.4) and two models developed for this research by the researcher (Figures 4.5 and 4.6). The role of the brand identity construct in the implementation of

IMC by Agency One has been investigated at some length and the strategic role of the Account Planner in this process has been presented.

Common forms of brand identity statement used by agency clients include brand books, brand guideline manuals and brand manifestos. It is normal for Agency One clients to reference their client brief back to a brand book or a brand manifesto and a brand guidelines manual, but on occasions these documents are created for and with the client by Agency One. A brand manifesto normally accompanies a creative brief when presented by the planner to the creative team. The subsequent big creative idea proposed by the agency must be consistent with the brand manifesto. The Agency One IMC creative process is presented in summary form, using Decision System Analysis, in Figure 4.6.

In addition, the three drivers of IMC, at a tactical level, are identified in Figure 4.5. The first driver, a brand identity statement, links the implementation of IMC back to its roots in corporate strategy - normally expressed in a brand book. The big communication idea, designed to address the client's business problem, is the second driver in the model, and the target audience's media consumption behaviour and the strategic media touch points associated with that, are identified as the third driver of IMC.

The second case study will now be presented.

4.3 Case Study: Agency Two

4.3.1 List of Evidentiary Sources: Agency Two

For the Agency Two case, three senior Agency Two executives were interviewed by the researcher. The executives interviewed were the Founding Partner, the Managing Partner/Planning Director and a Creative Director. Each executive was interviewed in depth, in a semi-structured manner, for approximately sixty minutes. The interviews were audio-recorded, transcribed and edited. The edited interviews were the source data for this study.

Two important documents were obtained from Agency Two; the Agency's Credentials Book and a Planning Day document. As discussed below, Agency Two's Planning Day model (Figure 4.7) has superficial similarities to Schultz & Schultz's Five-Step IMC Planning Process model (Figure 2.6), but is fundamentally different. It also has some similarity to Duncan's Zero-Based Campaign Planning model (Figure 2.7) but is also fundamentally different to that model.

4.3.2 Agency Two Profile

Agency Two was founded as a partnership by four of the most successful figures in the history of the New Zealand advertising industry. The partners, between them, had been responsible for much of New Zealand's most recognised and internationally awarded advertising. Today they are considered legends of the New Zealand advertising industry. Each creative in Agency Two has won over 100 local, regional and international creative and effectiveness awards, including gold statues at Cannes, The One Show and Clios. However, today the agency eschews awards, choosing not to enter award shows, believing that the motivation to win awards can distract creatives from making truly objective judgement calls in favour of what is best for the client's business. This reflects Agency Two's desire to do things differently from the traditional agency business model.

Agency Two charges a time-based fee for their services. They don't charge commissions and they don't talk to the press; they don't enter awards and they don't pitch for new business. They have grown carefully and selectively. They have hand-picked their staff based on their belief that these people are the best people in the industry - and they have also hand-picked their clients. They consider their most important asset to be their reputation.

Agency Two has turned the traditional agency hierarchy model upside down. Rather than senior people supervising less experienced staff who do the work, the senior people are the ones who do the work. The agency can do this by limiting the number of clients that they work with. At Agency Two clients pay for experienced, informed, independent advice; creative thinking that demands the involvement of senior agency management, who work directly with senior client decision makers - problem solving and creating opportunities together. The agency's goal is not to be the biggest agency in town, but to be - according to their own criteria - the best agency in town!

Agency Two's remuneration is based simply on time accrued on each job. Remuneration billing is transparent and media neutral. It does not include commissions based on media billings or mark-ups on electronic production or printing costs and it is devoid of hidden costs. Fees are based on the amount of thinking required and the complexity of the ideas involved. Clients pay for the value of the ideas proffered. Time is therefore the most precious resource involved - the time of agency principals as well as the time of senior client decision makers. Planning efficiencies are therefore imperative and Agency Two's Agency Two Day concept (discussed below) is a concept unique to the agency and one that does generate the time efficiencies desired. Agency Two operates as an independent local New Zealand agency without multinational links. It is, however, owned by an international investment group.

4.3.3 The Role of the Account Planner in the Agency

This section addresses RQ1: What is the role of the Account Planner in the agency?

The accepted traditional role of the Account Planner in creative agencies is, firstly, to bring clarity of understanding to the client's business problem; secondly, to bring clarity of understanding concerning the consumer insight; and thirdly, to write the creative brief that will set the platform for the creative strategy (Fortini-Campbell, 2001). At Agency Two this task is not undertaken by a department or a person but through a one day planning event entitled 'Agency Two Day'. This event and process is unique and distinctive to Agency Two. It is at the heart of how the agency operates and all that it does. It involves decision-making sessions that bring together the key client decisionmakers and Agency Two's senior executives for a day of interaction, discussion and planning.

“We always meet in the beginning of any (new client) relationship, with an Agency Two Day, which involves bringing in the best of their team (so it always involves their CEO and it usually involves their CFO), and in our experience, almost without exception, the marketing is the weak link. It’s frightening. I think it reflects the inability of a lot of people who are in marketing to get beyond their discipline and to actually see it in the bigger context. R 2.1

“Often the CEOs and the CFOs are the best marketers because they actually understand that they are in a business to return shareholder value and whatever is the most efficient use of the resources that they have to achieve that is what should be done.” (Founding Partner) R 2.2

The objective of Agency Two Day is to remove any barriers between advisor and advised and to look instead at drawing on the collective experience of both parties to reach conclusions and decisions that will be acted upon. This puts an onus on all of those involved to participate and to be open to new thinking and different experiences. It is considered by the agency to be highly effective. The collaboration at this early stage in the strategic process improves the speed, creativity and effectiveness of the desired outcomes.

“Agency Two Days aim to bring creativity closer to the actual business problems and aid accuracy, speed and clarity.” (Founding Partner) R 2.3

“Clients often come and think that they need marketing communications; that they need advertising. Our point is, let’s get back to the original issue and then once we understand that issue then work out the best way to solve it. Advertising might be a part of that solution.” (Managing Partner) R 2.4

Agency Two believes that their core strength is the application of their impressive creative and strategic experience to solving their clients’ business problems. This requires a thorough and concise definition of the problem; and taking the time to agree what the problem actually is - and for all parties to understand what success looks like when the problem is solved.

Agency Two’s Founding Partner believes that planning as a function is incredibly important. However he questions the wisdom of confining this function to a single planner. In his view Agency Two’s creatives are probably their best planners. This view is also held by the Managing Partner:

“The best creatives are often the best planners, because they have a real instinct for understanding the mind-set of consumers. They have a clarity and they know when something doesn’t sound right or doesn’t ring true. They have an ability to sense what is authentic.” (Managing Partner) R 2.5

The Founding Partner contends that the agency process of having everybody at the table at the same time often means that the answer to the client's business problem is resolved within half an hour of becoming engaged. Things can happen very quickly. He suggests that this is simply a function of having smart people around the table, ruthlessly collaborating in the pursuit of a solution.

“We involve the client from the start and we take them all through the process. We even involve them in the creative part of it. After defining the business problem we will often come up with the creative answer in that same session. The client is amazed, and they really love being part of the creative process. And often they are incredibly good at it because they know what their issues are. And they'll also come from a slightly different angle. We often have CFOs in here and so a finance guy might bring to the table a completely different perspective. The way we work here is very collaborative.” (Creative Director) R 2.6

Once the problem has been determined and the issues identified Agency Two sets about generating a series of hypotheses that will overcome the issues. These are not limited to branding and marketing communications; and may address areas such as the product itself, distribution or stakeholder engagement.

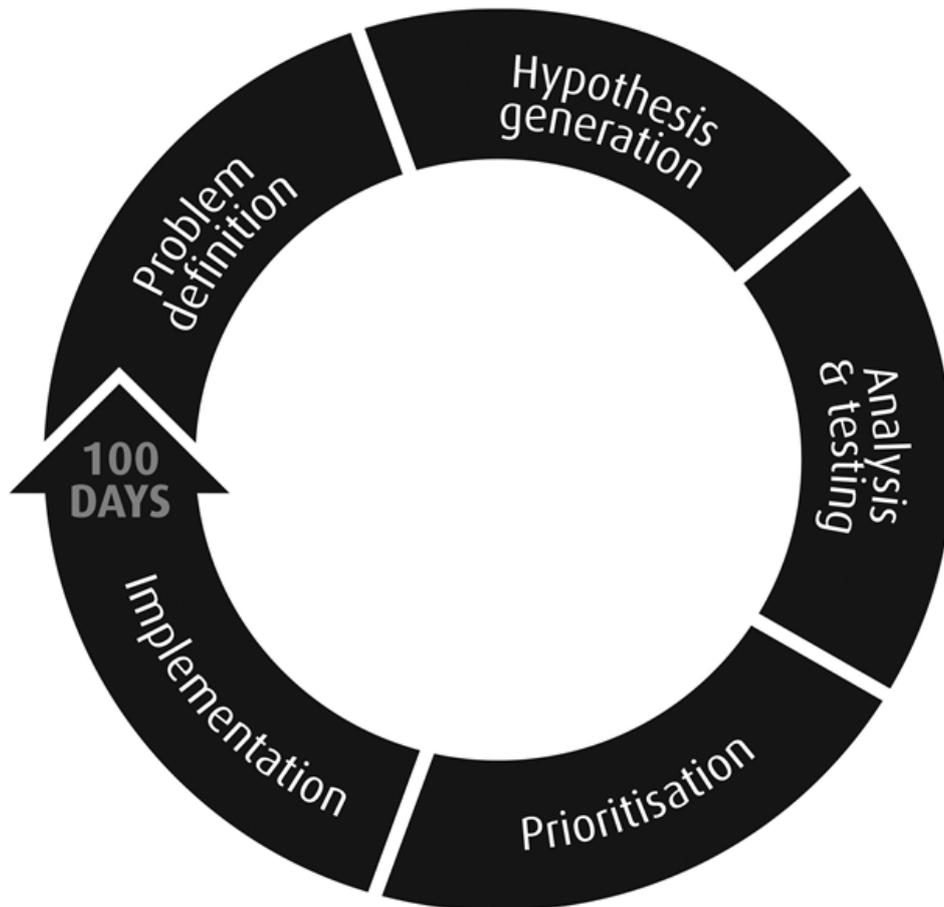
The next stage is determining which hypotheses are worth pursuing. They need to be both pragmatic and aspirational; that is, they need to meet the realities and complexities of the client's situation but they also need to be aspirational enough to drive the ambition to change the status quo.

The next step is to identify the actions that will make the biggest difference to the business with the least amount of difficulty. This involves prioritisation. All of this is brought together in a document entitled 'Agency Two Recommends' which outlines the problem, the solutions to overcome it and a plan for implementation (refer to Figure 4.7).

For many of Agency Two's on-going clients this one-day process is repeated every 100 days:

We've formed a partnership with the Auckland University Business School and together we have developed a way of working based around 100 day cycles - we meet, we plan, we implement; 100 days later, we meet, we plan, we implement. 100 Day Plans turn conversation into action. After all ideas aren't worth a lot until they are made real - that's when they make a real difference (Agency Two Credentials Book) R 2.7

Figure 4.7: Agency Two Planning Day Model



Source: Agency Two

Although there is a superficial visual similarity between Agency Two's 'Planning Day' model (Figure 4.7) and Schultz and Schultz's (2004) 'Five-Step IMC Planning Process' (Figure 2.6) in fact there is only limited congruence between Step 1 in Figure 4.7 and Steps 1 and 3 in Schultz and Schultz's model. That is, both models affirm the need to first gain meaningful insights into the needs and desires of the target audience before creating and delivering messages to them. The other steps in Schultz and Schultz's model are not addressed by Figure 4.7.

Agency Two's focus in Step 1 of Figure 4.7 on 'Problem Definition' is not included in the Schultz and Schultz model. We may assume therefore that the Schultz and Schultz model *presupposes* that the client's business problem is a problem that can be resolved through marketing communications. Agency Two does not make that assumption. The Managing Partner's comment in R 2.4 (above) suggests that the business problem may require a solution other than a marketing communications campaign or - 'as well as' a

marketing communication campaign. Agency Two's model involves the agency in the process of *defining* the client's problem as well as resolving it; a collegial process where client and agency are truly business partners - a rebuttal to the view that agencies are simply vendors or suppliers of services who will do what they are told by their marketing 'masters'; that 'ad agencies will do only as they are instructed by client organisations' (Beaulieu, 2013). Agency Two would never contemplate such a servile relationship (Heo & Sutherland, (2015).

Similarly, there is limited congruence between Figure 4.7 and Duncan's (2005) 'Zero-Based Campaign Planning' model (Figure 2.7). As with the Schultz and Schultz model Duncan's model does not include reference to the client's business problem. It necessarily assumes that the business problem is a problem that marketing communications can resolve. Steps 1-4 in Duncan's model affirm the need to analyse the target audience and define the marketing communications objectives before developing strategies and tactics to engage them; this is echoed in the strategic process described in Stages 1-4 of Figure 4.7. However, Steps 5-6 in Duncan's model are not addressed by Figure 4.7.

Steel (1998) contends that "at the heart of an effective creative philosophy is the belief that nothing is so powerful as an insight into human nature" (p. xiii). However Agency Two's Managing Partner (who is also the agency's Planning Director) argues that in the planning process *product* insights are perhaps more important today than consumer insights:

"We tend to think of consumer insights as being the only source of insight but, to be honest, I think that more important these days are product insights. What is the truth in the product? That truth being how the consumer relates to that product and how that product meets the function or needs of the consumer. The best work becomes finding brilliant insights and telling interesting stories about the product. Today the product and the brand have become disconnected, have become divorced, and I think, more and more, that brilliant products will win and that the unfair advantage of scale and advertising clout and marketing budgets is disappearing fast. Better products will win. That's my theory!" (Managing Partner) R 2.8

From the above discussion relating to Agency Two Day it is clear that account planning in Agency Two is a corroborative process. The role of the Planning Director in Agency Two involves firstly, listening to the client and to his agency colleagues as they discuss the client's business issues and business problems together:

“In my previous roles as an account planner my role was to do all the things that an account planner does, which was to bring clarity around understanding the issue and clarity around the insight, and then to help set up a platform for creative. Here I do a lot of listening. I then try to pull all the things that others are talking about together - and then to shape them and present them in a way where the result is a strategy. But we don’t necessarily know that we’ve been through a strategic process. It’s a different role here. Everybody has strategic contributions to make.” (Managing Partner) R 2.9

Agency Two’s collaborative, strategic planning process is a distinctive characteristic of the agency. Agency Two Day is a process where the planning and creative thinking is integrated around the client and where the agency and the client are able to agree relatively quickly on the issues and the business problem that needs to be solved.

According to the Managing Partner the process is highly efficient. Strategies to resolve the business problem are normally agreed to by the end of the day together.

Agency Two’s approach to account planning is significantly different from the process reviewed in the literature (Section 2.3.11.2).

4.3.4 The Role of the Creative Brief in the Creative Process

This section addresses RQ2: What is the role of the creative brief in the creative process?

At Agency Two the creative brief evolves out of the Agency Two Day discussions with the client. The Managing Partner is also the Planning Director at Agency Two and therefore takes responsibility for writing the creative brief. This involves attentive listening before the things that have been talked about are pulled together and presented in the form of a strategy.

“All you need to know from a client is what is the business problem? It’s actually quite a hard thing to figure out - what is the real problem? Selling the product may not be the real problem; it could be product performance or distribution or pricing or whatever. So I think that’s the first part of planning and I think that’s the brilliant thing about getting creatives involved in the problem early. I think the best creatives that I have worked with really enjoy solving that marketing problem first.” (Managing Partner) R 2.10

Agency Two’s Creative Director is adamant that good planning is foundational for effective creative work:

“We always describe this as if you are painting a house. You spend all that time on the preparation. Once you’ve done the sanding then the painting is actually really easy. So for us the planning bit is the start of the process. It’s finding those insights. It’s finding the truth behind what you’re trying to do and really isolating what the

problem is; and if we spend more time on that then the creative part is actually the easy piece.” (Creative Director) R 2.11

In Agency Two the creation of the creative brief is a corroborative process:

“The way we work here is very collaborative and I think the way that advertising is going is that it’s not collaborative. i.e. ‘Here’s the brief. See you later’. Here, we all have a hand in planning; we all have a hand creating and we all have a hand selling. I think that it is really important, particularly in an agency of this size, that we are all able to do that... The best word to describe creativity is ‘messy’. It is very interactive and it’s very collaborative. It is not linear. What we do here is the exact opposite to traditional agencies. We involve the client from the start and we take them all through the process and we even involve them in the creative part of it; we get all the decision-makers in the client’s business and all of our senior people around the table and we nut it out. We are defining the problem and often coming up with the creative answer in the same session. ” (Creative Director) R 2.12

According to the Managing Partner sometimes when clients visit the agency they are unaware that they have a business problem; they come in thinking they need advertising. Generally, however, if there is no formal brief from the client there is always a statement of intention from them: “This is what we want to do”. In Agency Two the account service people would refine such a statement into a formal brief: “This is actually what we want to do”. But it is the planner who has the ultimate responsibility for the core brand strategy that is presented back to the client.

“Hopefully a good strategy can give us enough ammo to fire off a number of different answers. So we’ll do that; it might be for five directions and we might work it up to maybe a page on each one or a paragraph on each one. Then we’ll have a session in the agency and take the client through those five creative proposals. This process will narrow the options down to two proposals - and then we’ll go away and work out the final one from there. It’s great actually, because it’s another example of us taking the client along the journey with us.” (Creative Director) R 2.13

The creative brief plays an important role in Agency Two. It is written by the agency planner (the Managing Partner) - normally after the agency’s Agency Two Day with the client. It is the platform for the agency’s creative recommendations.

The role of the creative brief in Agency Two is consistent with the literature reviewed in Section 2.3.11.3.

4.3.5 The Role of Brands in the Creative Process

This section addresses RQ3: What is the role of brands in the creative process?

In addition the section seeks to address four sub-questions relating to the role of brands in the creative process (RQ3.1, RQ3.2, RQ3.3 and RQ3.4). These questions will be addressed separately after RQ3 has been addressed.

In Agency Two the role of the brand is central to the creative process. The Founding Partner describes this role as follows:

“One of the things that I think we have learned as an industry is the concept of brand personality. I think that it’s absolutely fundamental to understand that the brand - wherever it behaves and however it speaks and everything else it does - has got to be consistent in the way that a person you like is consistent. You understand them and you are comfortable with the way they express themselves. If you have that concept absolutely locked in then the integrated communications just absolutely falls out of that because whatever mix of television or social media or whatever is used they are driven from the central thought of a consistent brand personality and a consistent expression of that personality.” (Founding Partner) R 2.14

The Managing Partner refers to the role of brands in the creative process as follows:

“We believe that integration is about having really clear clarity around the brand’s core idea. I think, more and more, that the core creative idea is not separate from the brand. It’s related to the brand, reflecting the brand purpose. If you can express that purpose in a really simple, really tight way that everyone can understand then you’ve got something really tight to work from.” (Managing Partner) R 2.15

For the Creative Director the key to creating ideas that effectively engage people is being honest about the brand:

“I think (effectively engaging people) comes back to telling the truth about your brand; being consistent about it and telling great stories. Storytelling is really vital - people have forgotten that I think. We have to be strong in telling those brand stories in truthful, entertaining ways, and finding great ways to get that message to the people who are buying the product. The best advertising is based on some great truth - but if the product doesn’t deliver the advertising is irrelevant” (Creative Director) R 2.16

The four RQ3 sub-questions will now be addressed:

RQ3.1: To what extent (and how) do account planners use a brand identity statement when formulating IMC strategy?

This research has argued that New Zealand advertising agencies typically use three forms of brand identity statement in the process of creating IMC for their clients’ brands: a brand book, a brand guidelines manual and a brand manifesto. Sometimes these

statements are supplied by the client to the agency and sometimes they are created by the agency for the client.

Agency Two frequently write brand manifestos for their clients.

“The statement starts with the words, ‘I believe’, or ‘We believe’...(something). This forces the agency and the client to articulate what it is that the brand believes in or stands for, what it is that makes it different and how the consumer can benefit from this. Manifestos are short in length and allow the agency to explore tone. They are statements that are not owned by the Marketing Department or the Planning Department but are owned by the Creative Department and the Planning Department and the marketing team together. Once the manifesto is written everything else falls into place quite quickly. The brand is brought to life in tone and in attitude and imagery.” (Managing Partner) R 2.17

According to the Managing Partner clients and brand managers will often have the manifestos printed on canvas and distributed throughout the company. CEOs will even have them in their boardrooms. They add life and energy to the brand.

Agency Two’s Creative Director affirmed these comments when answering the question, “Do any or all of your clients have some sort of brand statement?” His answer:

“Yes. And I think that a trend that we are noticing is the idea of a brand manifesto. It’s a statement of what the brand stands for and it is an indication of the tone of that brand. R 2.18

In creating these brand manifestos for a client we first look at their brand values and then we look at their existing charter and then their founding statements, and all that sort of thing. Then we turn that into a language that the consumer might respond to - rather than looking at it from the client’s perspective. It’s how a consumer would look at it. Which is quite interesting. So yes, we do create brand books and all that sort of thing but the manifesto seems to be quite popular with clients right now. It might consist of just two or three paragraphs about the brand.” (Creative Director) R 2.19

According to the Creative Director brand books, or brand guidelines are often manuals that people find very hard to read. The brand manifesto however, gets to the keywords very quickly. Stakeholders find them very helpful because they sum up a brand’s essence in just a few paragraphs.

The above practices by Agency Two are totally consistent with the literature reviewed in Section 2.3.9.

RQ3.2: What elements (for example: brand name, brand positioning, brand personality, brand values, brand graphics/logo) are included in any brand identity statement employed?

A text analysis of the responses by Agency Two participants to the research questions found that the following brand identity elements were mentioned: *brand name, brand personality, brand purpose, brand values, brand tone/voice, brand idea, brand essence, brand story, brand attitude and brand imagery*. R 2.20

RQ3.3: To what extent is a brand identity statement integrated into the creative brief?

From the above discussion we can conclude that Agency Two clients invariably have brand books, brand guideline manuals and brand manifestos. Agency participants report that brand manifestos are most popular with Agency Two clients because they are succinct and sum up the essence of a brand in a few words.

However it is not clear from Agency Two participant responses *how* the brand manifesto or the brand book or the brand guidelines manual are integrated into the creative brief in the creative process. Nevertheless, it is reasonable to assume from the following comments that they are an integral part of the creative process:

“It’s absolutely fundamental to understand that the brand - wherever it behaves and however it speaks and everything else it does - has got to be consistent in the way that a person you like is consistent... Integrated communications just absolutely falls out of that because whatever mix of television or social media or whatever is used they are driven from the central thought of a consistent brand personality and a consistent expression of that personality.” (Founding Partner) R 2.21

“We believe that integration is about having really clear clarity around the brand’s core idea... The core creative idea is not separate from the brand. It’s related to the brand, reflecting the brand purpose.” (Managing Partner) R 2.22

“Storytelling is really vital... We have to be strong in telling those brand stories in truthful, entertaining ways, and finding great ways to get that message to the people who are buying the product.” (Creative Director) R 2.23

“The best brands are where the product and the brand are absolutely one and the same, and that the product is no better than the brand and the brand is no better than the product, and that they are completely synonymous” (Founding Partner) R 2.24

RQ3.4 To what extent does corporate brand identity interact with and infuse product brand identity in brand identity statements used by New Zealand advertising agencies?

It has been argued above that brand books are effectively corporate brand identity statements. It has also been argued that Agency Two clients invariably have brand books.

It has been further argued that brand manifestos are succinct summaries of the brand, expressed in straightforward language that all stakeholders can understand. It has also been noted that brand manifestos are popular with Agency Two clients. However the answer to question RQ3.4 is less than clear.

What is clear, from the discussion of Agency Two Day, is that these planning days do not take place without the presence of the client CEO - and very often the CFO - as well as the CMO; the corporate leaders entrusted with the stewardship of the corporate brand. The Founding Partner proffered the following observation in this regard:

“A really good CEO has an absolutely fixed understanding of what their business is all about - and parts of their business including their brand and their products and their people and their suppliers. They understand that all of those things have got to connect in some way and that there cannot be a disconnect. So their sense of integrated communications is much deeper than just marketing communications.”
(Founding Partner) R 2.25

This perceptive statement confirms the view of theorists that IMC involves much more than just tactical or horizontal integration and is indeed cross-functional, vertical, strategically-consistent integration, emanating from the highest corporate echelons; championed by senior management and the CEO in particular (Duncan & Moriarty, 1998; Duncan & Mulhern, 2004; Kliatchko, 2008; Picton & Hartley, 1998).

It may be concluded therefore, from the involvement of client senior management in Agency Two Day planning, that there is a high probability that the corporate brand identity will indeed infuse the product brand identity in the process of creating IMC campaigns for Agency Two's client brands.

This practice is totally consistent with the literature reviewed in Section 2.3.7.

4.3.6 The Drivers That Integrate Marketing Communications

This section addresses RQ4: What are the drivers that integrate marketing communications?

From the discussion above it is clear that Agency Two considers some form of brand identity statement to be the cornerstone or fundamental driver of their client's IMC. As the Founding Partner observes, it is imperative that a brand behaves and speaks in a consistent and positive manner, reflecting a consistent and positive brand personality and

identity. In other words we can assume that from Agency Two's perspective brand identity is a key driver or centre of integration of a brand's marketing communications.

A big idea has been suggested as a major driver of IMC by Saatchi & Saatchi (BBR Saatchi & Saatchi, 2012). This assertion met with qualified approval from Agency Two's Founding Partner:

"The big idea is I think advertising speak. The big idea has been around forever and basically it underpins nine out of ten presentations that agencies make. I think to rephrase it as the right idea is a much more strategic thought. The right idea could be a big idea - but the big idea could be a wrong idea!" (Founding Partner) R 2.26

A similar, qualified view of the role of the big idea in IMC was expressed by Agency Two's Managing Partner:

"I think we need to move on from the idea where integration is all about making everything look and feel exactly the same. It's about taking that core creative idea and just letting it play out, and not worrying so much about matching luggage, but playing with it and letting it evolve in different ways. That's how you keep it fresh." (Managing Partner) R 2.27

A third major driver of IMC has been suggested as being the consumer him/herself. A study of consumers' media consumption behaviour can identify and determine what media channels will most effectively deliver marketing communications messages from the brand that will engage them. The choice of media channels is therefore integrated around the consumer themselves. The consumer's media consumption behavior is the third major driver of IMC. Agency Two's Creative Director concurs with this view:

"There is no point creating a piece of communication that your target audience is not going to see. So, of course, you have got to be cognisant of what the media behavioural traits are of the target audience. R 2.28

Budgets are shrinking; expectations are greater; the media is more fragmented; there are more opportunities for people to opt out - so what you have to do is to be consistent. You have to be really clear about what your brand stands for, so that every time someone has the opportunity to see or interact with your brand they are getting that consistent message. The same brand persona, the same tone of voice: whether it's a TV ad, whether it's a radio ad, whether it's a piece of print, whether it's a poster on Facebook, whether it's a stunt - there has still got to be that connection back to the master brand. Because that's the only way you can get some sort of economy of scale on your investment." (Creative Director) R 2.29

From the comments above this research contends that Figure 4.5 accurately identifies the three primary drivers (or centres) of integration that in unison interact with each other and co-create IMC for Agency Two's client's brands.

4.3.7 Strategic Versus Tactical Integration

This section addresses RQ5: To what extent is IMC, as practised by New Zealand advertising agencies, anything more than just 'tactical integration'?

By virtue of its Agency Two Day planning concept, where senior client executives meet and interact with senior agency executives to resolve the client's business problem, this research argues that Agency Two is clearly committed to the strategic imperatives that characterise strategically integrated marketing communications - rather than just tactically integrated marketing communications for their clients. *It is clear from this study that Agency Two is not anchored at Stage 1 of Schultz and Kitchen's (2000a) Four Stage IMC Model.* R 2.30

4.3.8 Measurement and Evaluation of Effectiveness

The question relating to Agency Two's post campaign evaluation and analysis processes (interview question 16) was not responded to directly by Agency Two participants but was alluded to in their responses to other interview questions:

"One of the problems that marketing has grappled with over the years is accountability. One of the expressions that we use around this table a lot is, 'If we were writing the cheque what would we do?' And it's a different conversation. We don't enter any award shows. Oftentimes agencies chase awards rather than what's right for their client's business. R 2.31

I think that creating and being part of a dialogue with consumers is extraordinarily important now and you ignore that at your own peril. If you are not part of the dialogue it is going to continue anyway. We spend a lot of time on social media, on what's happening to the conversation and how we can influence it and fix things that we need to fix. There may be 10 different strains of communication going and every so often one will just ignite a response - and its knowing how to fuel the flame that makes an enormous difference. The beauty of social media is that it is incredibly efficient. You are getting feedback all the time and it's not costing you anything. Picking up pieces of conversation which you can then use to ignite brand interest - that's where it's at." (Founding Partner) R 2.32

"One of our client's brands has 150,000 people out there on Facebook. Now that's a TV channel and we can talk to those people every minute of the day if we want to, and absolutely target people who love that brand. You can't do that with TV these days. The client realises that they don't actually own their brands; the country owns those

brands. They become guardians of those favourite parts of our lives - and once you respect your followers and your customers like that then that's an army, and you can do anything. You get instant feedback - and you can co-create your brands with your customers. They become like a research group - and you don't have to pay for it. Isn't that amazing!" (Creative Director) R 2.33

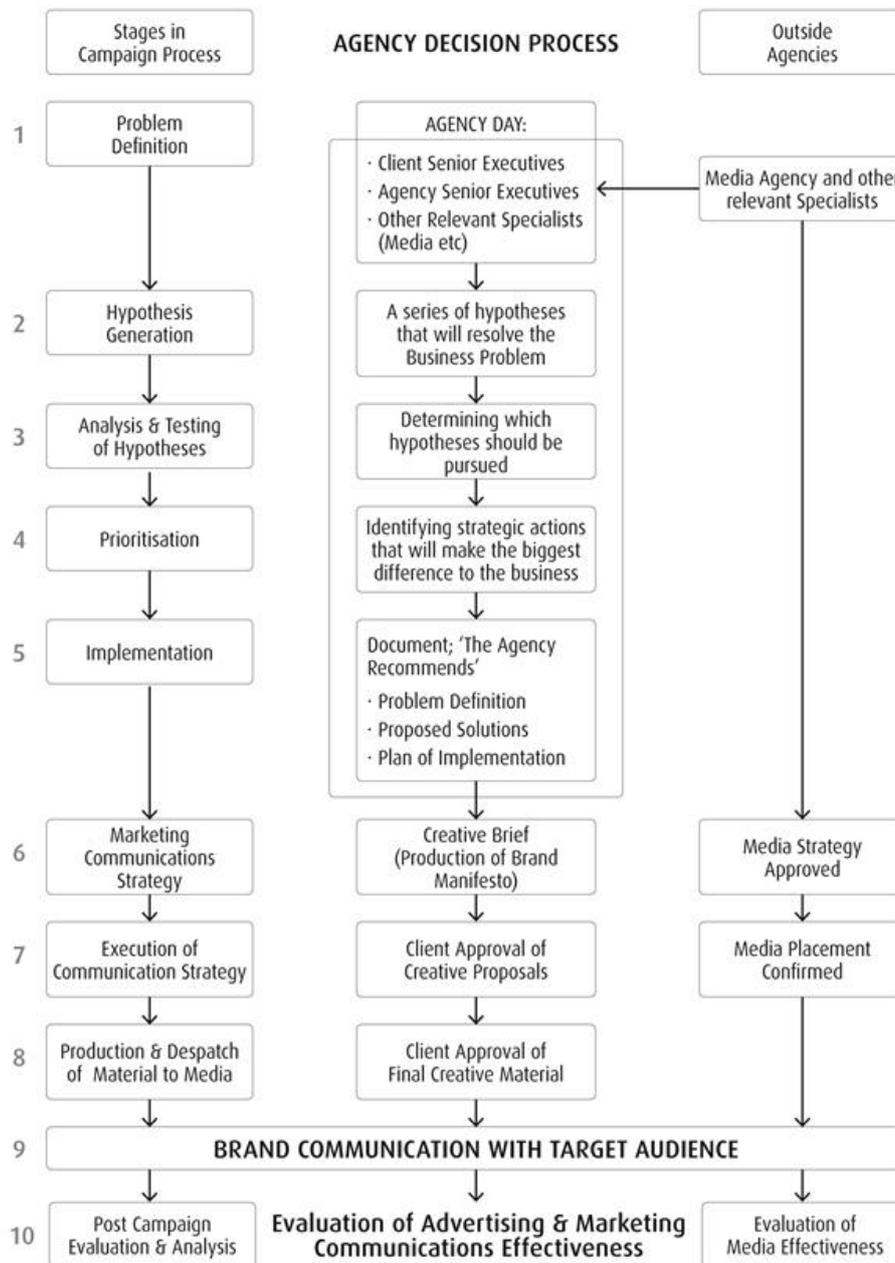
"We used to live in a command and control era where every piece of branding was measured; the logo goes there, and you do this, and it has to be smiley, happy people - or whatever. You have to let that go now. You have to provide enough stimulus and inspiration but remain the dominant voice in the conversation. You have to give consumers enough freedom within a framework to let them contribute an idea. You can't control it any more. But you've got to provide enough interesting stimulus and inspiration so that they will take things in the right direction. So you need to understand your manifesto and your core brand and be really clear about that - and then allow people to go and do things and just hope that you've given them enough inspiration and stimulus to do it right." (Managing Partner) R 2.34

It can be concluded from the above comments that Agency Two's post-campaign effectiveness measures and analyses are consistent with the literature reviewed in Section 2.3.12.

A DSA chart for Agency Two will now be presented.

4.3.9 Summary Statement: Agency Two Decision System Analysis

Figure 4.8: Agency Two: Brand Campaign Creative Process



Source: Developed for this research

Figure 4.8 applies DSA to Agency Two. The flow chart highlights Agency Two's unique collaborative approach to, firstly, defining a client's business problem, and secondly, to constructing a strategic response to that problem. The development of a marketing communications strategy is encapsulated in the process the agency calls Agency Two Day.

The process begins with key client decision makers (including if possible the CEO, the CFO, the COO and the CMO) meeting Agency Two senior executives at the agency. Some relevant non-agency specialists may also be invited to participate. A whole day is set aside to interact and collaborate together in the resolution of an important client business problem. The goal is to reach conclusions and decisions that will be acted upon. The interaction of participants with unique perspectives and experience, sitting around a common table, with no predetermined solution in mind, and with a dedicated focus on the issue, invariably gives rise to fresh insights and creative solutions. For Agency Two this is the planning function at work. Everyone has a hand in the planning.

Once the problem has been defined, the issues identified and all parties understand what success looks like the next step is to generate a series of hypotheses concerning how to overcome the problem. These hypotheses may extend beyond brand and communication recommendations to include recommendations that, for example, relate to product or distribution improvements or wider stakeholder engagement.

Next the hypotheses are evaluated to determine which ones are worth pursuing. A decision may be made on the spot or further work may be required before a decision can be made. Proposals must be both pragmatic and aspirational; they need to be realistic but also provide motivation to change the status quo.

The next step is to prioritise which actions will make the biggest difference to the business with the least amount of difficulty.

The agency planner then prepares a document that sums up the day's deliberations. It defines the problem, summarises the proposed solutions and lays out a plan of implementation. The document is entitled 'The Agency Recommends'. It is effectively the client brief.

The creative brief also evolves out of the Agency Two Day discussions with the client. In Agency Two it is written by the Managing Partner who also fulfils the role of Planning Director at the agency. If there is no existing client brand identity statement a brand manifesto statement is crafted at this point by the Managing Partner/Planning Director. A media strategy is also drafted at this point.

Creative responses to the creative brief flow more readily at Agency Two because the creatives working on the brief are fully involved in the discussions that occur on Agency

Two Day. They have a comprehensive insight into the client's business problem and have already contributed to the hypotheses proposed to resolve it.

Next, creative and media proposals are presented to the client. When they are approved by the client, media placement is confirmed and final creative material is prepared, signed off by the client, and despatched to the media.

The campaign will then run in the media and the target audience will (hopefully) become engaged.

The final act in the process is to evaluate the effectiveness of the campaign across all criteria. Have the marketing goals been met? Have the marketing communication goals been met? What has been the return on investment (ROI)? What has been learnt that needs to be factored into future activity? This learning will be incorporated into the next Agency Two Day with this particular client.

The above discussion is consistent with and illustrative of the DSA literature reviewed in Section 3.5.4.1.

4.3.10 Agency Two: Conclusions

The accurate definition of a client's business problem is considered by Agency Two to be an important and necessary prerequisite to solving that problem. Agency Two's core strength is the extensive creative and strategic experience of its principals. A unique and distinctive practice employed by the agency (building on their core strength) is its innovative Agency Two Day concept; a day of decision-making sessions where key client executives and agency principals collaborate to reach conclusions and strategic decisions that will be acted upon to solve the client's business problem.

Agency Two believes in the traditional agency planning function but implements this process at a unique executive-level and in a collaborative manner rather than allocating the task to a single account planner. This is a practice unique (amongst New Zealand advertising agencies) to Agency Two.

It can be concluded from the above discussion that Agency Two affirms the notion (illustrated in Figure 4.5), that there are three drivers or centres of integration that interact to co-create IMC. These three drivers are brand identity, a big idea, and identification of the target audience's media consumption behaviour.

The third case study will now be presented.

4.4 Case Study: Agency Three

4.4.1 List of Evidentiary Sources: Agency Three

For the Agency Three case, three senior Agency Three executives were interviewed by the researcher: the Managing Partner, a Planning Director and a Copywriter. Each executive was interviewed in-depth for approximately sixty minutes in a semi-structured manner. The interviews were audio-recorded, transcribed, edited and then used as the basis for this study.

An extensive number of documents were forwarded by Agency Three to the researcher. The documents included the following items: the agency's Change Brief template, the agency's Brand Conviction questions, the agency's Brand Conviction Springboard document, the agency's The Springboard Approach booklet, an Effie case study, and two client brand books. They all contributed significant additional insights into the philosophy and practice of the agency when developing IMC campaigns for their clients' brands.

4.4.2 Agency Three Profile

Agency Three is a leading multinational creative advertising agency and one of the longest-established advertising agencies in New Zealand. It continues to be one of the largest agencies in the country in terms of fees billed and staff employed.

Agency Three is one of New Zealand's most awarded agencies. It has frequently won New Zealand Agency of the Year awards and on one occasion won all three annual awards - conferred by NBR, Fairfax/AdMedia, and Campaign magazine, respectively - in the same year.

Implicit in the above is the fact that Agency Three is one of New Zealand's most creatively awarded advertising agencies, regularly winning Cannes Gold Lions and Clio awards. In addition, it frequently wins Effies for advertising effectiveness

4.4.3 The Role of the Account Planner in the Agency

This section addresses RQ1: What is the role of the Account Planner in the agency?

Agency Three has seven planners in their Planning Department. Each planner is responsible - client by client and project by project - for establishing marketing communication strategies that have been integrated into clients' brand strategies. It is

then their responsibility to ensure that these communication strategies are delivered on course and effectively throughout the creative and execution processes.

“We bring in planners for major jobs that are strategically important to the client. These are jobs that are fundamental to a brand’s well-being, where you are going to invest more money and where you are going to do something that is going to be quite major in terms of the brand’s lifespan.” (Managing Partner) R 3.1

“Planners tell us what area we need to focus on. Their role is to take the client’s problem and make it as simple as possible and tell us what we need to solve. If they can give us some insights along the way into how we might best talk to the target market, that’s a bonus as well. It doesn’t always happen but it’s pretty good if it does.” (Copywriter) R 3.2

The planner is expected to bring to the project a more considered, consumer-oriented view; a deeper understanding of the target audience and an in-depth understanding of what is happening in consumers’ lives and in the marketplace and in society in general.

“From an account planner’s point of view you are looking at assisting the client to define what their commercial problem is that communications or advertising can help them solve. It means bridging the gap between the client’s business needs (in terms of sales and market share) and the more conceptual world of creativity and ideas... The role is a bit like that of a translator. It needs to understand the numbers, the metrics, the intentions and the rigour of business and then it also needs to understand form and the artistic side of creativity, and the way that art influences people in their interaction with business.” (Planning Director) R 3.3

Agency Three offers only qualified support to the contention that the planner is the consumer’s advocate within the agency. According to Agency Three everybody in the agency needs to have a consumer mind-set - and that includes creatives, planners, and client service executives.

“I do agree with the point that the planner is the one who needs to be most in tune with culture and trends and the movements of people’s attitudes, and what’s in and what’s out, and what’s up and what’s down, so that we can make sure that communications are plugging into the right tides or streams of social behaviour - so that they are effective. But by and large, creatives, for example, are more and more viewing their work from a consumer rather than from an industry point of view. I suppose that we wave the flag of the consumer the highest, but I think that everybody needs to have a consumer mind-set.” (Planning Director) R 3.4

Agency Three’s Planning Director agreed with the researcher’s suggestion that, “Agencies need to climb into the target audience’s mind and understand their world; their fears, their hopes, their aspirations; and speak their language in an authentic way.”

“Yes, certainly. Research is a rather clumsy tool at the best of times. But the truth is that we do have to keep abreast of consumers and keep in touch with them, and that requires talking to them and that requires a lot of extrapolation. I suppose that’s where an understanding of psychology is quite useful because a lot of the time it is what’s unsaid by consumers that is important. Often campaigns fail when things are taken at face value and are accepted verbatim as outputs of the consumer’s world, and are considered significant - but it is not what they are really saying. The role of the planner is not just to know what’s going on at a surface level but also to be able to discern what is going on underneath as well.” (Planning Director) R 3.5

According to the Managing Partner Agency Three typically functions utilising a triangular relationship between a senior client service executive, a senior planner and a senior creative.

“Most creative people are inherently in their jobs because they are brilliant at understanding what will tweak a customer’s interest. They just know what people like to watch and what they find is funny or interesting or entertaining or informational. So if you put me and my team (the organised people) together with some planners (who are a bit more considerate; who put a bit more thought into the issue than we typically would), and then add some creative people (who have got the intuition), there is sort of a triangle there that works. R 3.6

Clients now expect to see planners. They also want to see creative people. We too want creative people to see clients and to have a relationship with them. The best scenario is actually to go to the client as a threesome. With the client that becomes a foursome. It is very much a collaborative process.” (Managing Partner) R 3.7

In Agency Three, within this triangular relationship, each specialist brings their own point of view to the problem.

“The creative person might show us an idea; the planner will compare that idea to his or her brief, and I’ll be sitting there thinking about the practicalities - can we afford to make that, can we do it within the timeframe, and are there going to be inherent problems with the proposed talent or music. So between the three of us we tend to understand the job that needs to be done, how it needs to be done, when it needs to be done, and for how much it needs to be done.” (Managing Partner) R 3.8

One of the responsibilities of the Account Planner is, typically, to come up with the consumer insight. In the Planning Director’s view this concept is often used far too liberally. Depending on the task at hand the definition of an insight can vary significantly:

“If you are looking at a big cultural brief the insight you are looking for at that level is a cultural insight - it’s a human truth. It is something really resounding; something completely universal. If, on the other hand, the project is going to be a little bit more specific and it’s about a particular group behaving in a particular way at a particular time, an observation of behaviour might be more appropriate, and that would be your insight. So it is not a case of an insight being a particular thing; it’s a case of an

insight being the thing that you decide to be the most important factor. It is the bit that you pull out and say, that's the insight!" (Planning Director) R 3.9

The Planning Director believes that the best insights present themselves as tensions, or as unresolved needs, aspirations or desires that consumers have.

"This occurs where a consumer either wants to be behaving in a particular way or is being forced to behave in a particular way, and it's not really what they want to do, and they are not quite as happy as they could be. A great insight, I think, is one that identifies a tension, either big or small, that the campaign and the product therein can resolve - it can actually be useful as well as being entertaining . Otherwise we're just shouting our product; we are not really helping people, we are not really influencing people. It is all about tensions, where something is slightly out of whack. And, in a really ruthless sense, where there is a tension there is money to be made." (Planning Director) R 3.10

In Agency Three there is a clear distinction between the role of the Account Planner and the role of account service executives (Suits):

"As Planning Director I am in charge, project by project, client by client, in establishing the strategy for communications and how it relates to the brand strategy; and then, making sure that that is delivered through the creative and execution process. I set the direction and then hold it on course." R 3.11

A suit is a person who hunts for business and is a project manager and is really detail eccentric. Planning is a discipline that is kind of half creative and half suit, all mixed together. The suit is responsible for driving the piece of business as a business. They are like a project manager; getting work done: 'Is it happening? Is it good? Is it on time? Is it valuable to the client and valuable to the agency?' They manage the business procedure and the pragmatic element. They are the ones who are responsible for everything, and while they bring different people in at different times, it is ultimately their project. The suit is always at the table, until the very moment when the junior suit hits the send button to dispatch material to the TV station or to a magazine or to the printers or to whatever. I don't see a lot of tension between planners and suits." (Planning Director) R 3.12

The above discussion supports the contention that the function and role of the Account Planner in Agency Three is consistent with the function and role of account planners depicted in the literature reviewed in Section 2.3.11.2.

4.4.4 The Role of the Creative Brief in the Creative Process

This section addresses RQ2: What is the role of the creative brief in the creative process?

The creative brief is the agency's response to the client brief. In Agency Three it is the role of the planner to turn the client brief into the creative brief.

In Agency Three it is common for a planner to be highly involved with a client's business - having on-going conversations with the client - and probably having a hand in writing the client brief.

“A planner will know when the brief is coming and they will probably have had a hand in writing that brief. So we will be in conversations with the Marketing Director around what they are trying to do with the business. We will be commenting on the issues that they have, so we are forming the client brief a little bit with them, and that's about setting up the type of outputs and objectives for the work for the agency to achieve. R 3.13

So in those situations we don't have to respond to the brief because our thinking is already in it. In situations where a brief just lands on our desk we will often take the step of responding back to the client and challenging things in the brief, or agreeing with them, or just fine-tuning the brief. And more often than not it's just a case of trying to make sure that our brief is not trying to do too much; it's about 'Give us one thing to do and we'll do it really well. Not: Give us five things to do and we won't do any of them well.' That's a fairly common-sense approach, but it does hold true.”
(Planning Director) R 3.14

After receiving the brief from the client the next stage is for the agency to respond to the brief or to reframe the brief or to get the client to change the brief. At this stage, where the brief is being crystallised, the planner will often work hand-in-hand with client service executives until the task is completed.

In the next stage the planner will undertake extensive research in order to determine what are the forces at play.

“What have people done in the past? Who have succeeded in answering this problem in particular ways? What is the brand trying to do? What are other people doing in this area? Just trying to get a feel for whatever you can and more often than not there is only 5% of the information out there that you thought there would be. R 3.15

Then there's the process of analysing all of that data, and while these aren't really formal stages they are certainly the soft stages that you go through internally to try and figure out what is the behaviour that we are trying to change. What are the levers or forces that can influence that behaviour in the consumer's mind; in the consumer's lives? And then, what other kind of forces influence those levers? So we try and get in our head a sense of what's important and what's not. In the beer category, for example, sociability is a big factor, pride is a big factor. They are big levers that everyone plays to.” (Planning Director) R 3.16

Marketing communications is concerned not just with changing attitudes but also with changing behaviour (Rossiter & Percy, 1987). Agency Three focuses on specific behavioural change objectives and then sets about to identify the influences that will

activate those behavioural changes - cultural, emotional or rational triggers that will spark the desired response.

“What is the story, what is the creative spark that is the interesting thing in consumers’ lives culturally, emotionally and rationally - which we can leverage and create that influence - to create that behaviour, to hit the business objective?”
(Planning Director) R 3.17

The planner’s role in the marketing communications process is to encapsulate the communications strategy in the creative brief. This process is summarised by Agency Three’s planning spokesperson as follows:

“At a really simple level there are three steps: Inform, Explode, Refine. First, you pull in as much information as you can. Next, you explode that data. That is; you take all of your thoughts and light the fuse and see what happens and see where it takes you to. So, you take an observation and you push it as far as it will go - to where it is getting a bit thin in relation to the brand and the product and what you are trying to create. Then there’s the refinement stage. What are the really interesting applications, in communications terms, of what it can do? What are the really interesting stories that someone is going to feel and be moved by?” (Planning Director) R 3.18

Once completed the creative brief is presented to the client. This would normally involve a five or six slide presentation to show that the agency understands what the job entails and what is required strategically. If the client agrees with the proposal and signs it off it will then be put into the Creative Department.

“When we put a brief into the Creative Department we give them two weeks to work on it. It always used to be a month, but that time frame has halved. (Managing Partner) R 3.19

In Agency Three there are a number of stages that a creative team undertakes when responding to a creative brief - turning a brief into creative work:

“Well the first stage is always to ‘bag the brief’ - whether it is good or bad! You have to say, ‘Oh this is terrible. How are we going to come up with anything from this?’

If it is a big job about 10 of us will go off-site and work on it pretty intensively for about three days. 10 creatives - including a Creative Director (we have about 40 creatives in this agency). R 3.20

The 10 of us get together and we just talk about it at first; where there might be opportunities, and so on. And then we all go off into our separate teams; so it is just me and my partner talking about it. And you work and then you come together at lunchtime or at mealtimes, and casually chat about stuff, but you hold your ideas a little bit close to your chest. R 3.21

And then, at the end of the day, we all catch up and each team goes 'This is what we are thinking'. We then put everything up on a wall and a Creative Director will go: 'Okay, you've got this idea, you've got this idea, you've got this idea'. And that might serve as a way to refocus for the next day - if someone's got a line, or if someone's got a territory that seems to be working. So the Creative Director goes, 'Okay let's all have a look at this area'. Or, 'This is interesting. What else can we do around this?'

R 3.22

Working together off-site has great value in that nothing else can disturb you. After three days we are able to present to the suits, the planner and the Creative Director and say, 'This is where we're at; these are our favourite things'. And then they give us a steer. Individual teams are briefed on what they need to do. So we all finesse the things that we talked about and then these proposals go to a 'tissue session' with the client. The client chooses two ideas that they like, which are to be continued, and the two teams that are working on these proposals continue to work on them. Finally the client will choose from one of those proposals." (Copywriter) R 3.23

It is clear from the above discussion that the role of the creative brief in the creative process employed by Agency Three is thoroughly consistent with the literature reviewed in Section 2.3.11.3.

4.4.5 The Role of Brands in the Creative Process

This section addresses RQ3: What is the role of brands in the creative process?

In addition the section seeks to address four sub-questions relating to the role of brands in the creative process (RQ3.1, RQ3.2, RQ3.3 and RQ3.4). These questions will be addressed separately after RQ3 has been addressed.

All of Agency Three's clients have some form of brand book or brand identity statement.

"There is definitely a brand book. All of them have one. It is universal. It really comes down to the scale of it, in each case. International brands definitely have a brand book. They include the history of the brand, the tone of voice of the brand, the brand promise, the brand values, the brand positioning, the brand persona and the brand graphics." (Managing Partner) R 3.24

Agency Three's planning spokesperson agreed that the role of the brand in marketing communications is absolutely fundamental for effective communications to take place. The brand is the cornerstone upon which an effective marketing communications edifice can be built. It is imperative that agencies intimately understand the anatomy of their client's brand; that they understand that the brand must permeate and link every aspect of the client's marketing communications.

“The way I see it is that a good brand is an idea in itself - it’s a big universal idea; a big directive idea. They are ideas with a statement and they stand for something. The traditional brand book has been where a brand has been something you had to control and manage. You got forced to fit into this brand template and very quickly the brand started to lose its interest factor. I think that in the digital age brands need to be self-forming. So a great brand should be an inspiration, not a rule book.”
(Planning Director) R 3.25

According to Agency Three it is really important to understand a brand in terms of ‘What is the brand’s role? What is it there to do?’ For the Planning Director this is more important than what it looks like, how it talks, how it feels.

“Nike is a good example. Nike is the Greek goddess of victory and success. Of competition. It’s about action. It’s about doing things. But it is inherently about the thrill of competition, the spirit of competition. What integrates Nike marketing communications is the fight to be the best, to be the winner, to compete. That’s what holds the story together. It is a big storyline. Rather than holding it together with all these kinds of rules and visual presentation requirements, it is about the story.”
(Planning Director) R 3.26

Brand personality and brand values are important building blocks when building a brand. However the Planning Director argues that brand values could be a more useful concept than brand personality.

“I would say that personality characteristics are the big building blocks of the brand. They are the immovable things. But a person does have different faces of themselves. There is a difference between my personality here in this room versus my personality with my wife, versus my personality on the playing field, versus my personality in the boardroom. That is why I think the term values is more useful than personalities because values are the system of hierarchy within a person that set out what they deem to be important and what they deem to be unimportant. That’s eternal; that’s what makes a person consistent.” (Planning Director) R 3.27

In Agency Three the brand book is a statement of the purpose, function and key attributes of the brand. The brand book asks the questions: Why does this brand exist? What is its raison d’être? What is the brand’s contribution to society? What is its social function? What role does it play in people’s lives? Why should people embrace it? The answers to these questions are often summarized in a one or two page statement as a brand manifesto, which becomes a very tight brief for creatives to work off.

“We often prefer to work to brand manifestos - a statement of why we are here; what we are here to do; what people get out of us; in such a way that we are not just building parameters around what makes our brand, we are building purpose into it; we are building a reason and a motivation and a direction.” (Planning Director) R 3.28

The above practices by Agency Three are totally consistent with the literature reviewed in Section 2.3.9.

The four RQ3 sub-questions will now be addressed:

RQ3.1: To what extent (and how) do account planners use a brand identity statement when formulating IMC strategy?

Agency Three frequently refer to three forms of brand identity statement when creating IMC for their client's brands: brand books, brand manifestos and brand guideline manuals.

"There is definitely a brand book. All of them have one. It is universal... They include the history of the brand, the tone of voice of the brand, the brand promise, the brand values, the brand positioning, the brand persona, and the brand graphics."
(Managing Partner) R 3.29

"We often prefer to work to brand manifestos." (Planning Director) R 3.30

"It is important to have a good knowledge of the brand as part of the creative brief."
(Copywriter) R 3.31

RQ3.2: What elements (for example: brand name, brand positioning, brand personality, brand values, brand graphics/logo) are included in any brand identity statement employed?

A text analysis of the responses by Agency Three participants to the research questions found that the following brand identity elements were mentioned: *brand name, brand personality, brand purpose, brand values, brand tone/voice, brand positioning, brand idea, brand story, brand graphics, brand promise and brand function.* R 3.32

RQ3.3: To what extent is a brand identity statement integrated into the creative brief?

There are a number of comments by Agency Three participants that suggest that a brand identity statement in the form of a brand book or a brand manifesto is integrated into creative briefs for client brands' IMC campaigns:

"As Planning Director I am in charge, project by project, client by client, in establishing the strategy for communications and how it relates to the brand strategy; and then, making sure that that is delivered through the creative and execution process." (Planning Director) R 3.33

“Tonality is really important. When you are working with a TV-heavy medium market your brand must become one of consistency. We’ve always got to talk with exactly the same tone of voice, with exactly the same sort of feel, with exactly the same look, exactly the same sort of attitude, so that we create this really consistent idea of how the brand is.” (Planning Director) R 3.34

“It is important to have a good knowledge of the brand as part of the creative brief.” (Copywriter) R 3.35

“We had a meeting this morning with a client for whom we had written a ‘brand conviction’ statement. It is our proprietary tool. It is basically seven or eight questions which need to be answered, which we have written in conjunction with the client and a research company. The client came in and we showed them the creative brief that had come from this brand conviction statement. They signed it off - so we are going to put it into the system.” (Managing Partner) R 3.36

In Agency Three brand identity statements are integral to the creative process.

RQ3.4 To what extent does corporate brand identity interact with and infuse product brand identity in brand identity statements used by New Zealand advertising agencies?

This thesis contends that brand books are effectively corporate brand identity statements. Agency Three’s Managing Partner is adamant that all of the agency’s clients have a brand book in some form. It can be assumed from the Planning Director’s comments that many of them also have brand manifestos.

In Section 2.3.5 of this thesis it has been argued that IMC can be conceived at two distinct levels: at a strategic level (as a management philosophy) or at a tactical level (as a process of campaign development connected to a wider brand strategy) (Duncan & Mulhern, 2004; Reid et al. 2005). Pickton and Hartley (1998, p. 449) note that “to be implemented IMC requires the involvement of the whole organisation and its agents from the chief executive downward”. In other words, IMC at a tactical level must be driven by the corporate management philosophy at a strategic level. In Section 2.3.7 of this thesis it has been argued that corporate brands are “expressions and images of an organisation’s identity” (Abratt & Kleyn, 2012, p. 1053). All established corporate brands have core values which provide a basis for continuity in the process of managing, developing and protecting those brands as strategic organisational assets. The core values of an organisation must represent the same values expected and appreciated by their customers over time. The corporate brand alerts stakeholders to a set of principles that the

organisation stands for, to the desired behaviour expected from staff to a set of values that bond the organisation (Kitchen et al. 2013).

This thesis contends that an organisation's core corporate values, mission and vision are encapsulated in an organisation's brand book. It has also been argued that corporate brands and product brands are inextricably mixed; that the image of the corporate organisation can often exert a strong influence on the brand image of a product (Pickton & Broderick, 2005). The text analysis response to RQ3.2 in this case study suggests that elements consistently present in Agency Three client brand identity statements include brand purpose, brand values and brand story - fundamental elements in corporate brands. The thesis therefore argues that the integration of these brand book elements into the creative brief is normal practice in Agency Three.

4.4.6 The Drivers That Integrate Marketing Communications

This section addresses RQ4: What are the drivers that integrate marketing communications?

It can be concluded from the above discussion that Agency Three regards some form of brand identity statement - be it a brand book, a brand manifesto, or some other statement defining the anatomy of the client's brand - as a fundamental driver, or centre of integration, of the client's IMC.

The role of the big idea as a driver of integration was canvassed with Agency Three's participants. The Managing Partner commented as follows:

"First of all, I don't look at it as a big idea - I just think that what ties everything together is an idea. And certainly, that idea and whatever communication is built around it - the client expects that that is going to fit with their brand values. The worst thing that a client can say to me after a creative presentation is: 'You don't seem to understand our brand.' We tend to focus on a good idea and show the client a good idea - and clients are literate enough to understand that when they see a good idea, that idea could be put into any form of media." (Managing Partner) R 3.37

Agency Three's Copywriter made similar comments:

"True integration comes from a big idea. An integrated idea is media neutral. It just goes where it needs to go and it gathers its own steam." (Copywriter) R 3.38

When asked by the researcher whether the consumer might be a third driver of integration, in that a campaign's media strategy is integrated around the consumer's

media consumption behaviour, Agency Three's Copywriter and Managing Partner both readily agreed.

"Yes, it makes sense." (Copywriter) R 3.39

"Agreed." (Managing Partner) R 3.40

The above comments support the contention, expressed in Figure 4.5, that there are three primary drivers of integration that together co-create integrated marketing communications: brand identity, a big idea and the target audience's media consumption behaviour.

4.4.7 Strategic Versus Tactical Integration

This section addresses RQ5: To what extent is IMC, as practised by New Zealand advertising agencies, anything more than just 'tactical integration'?

The argument made in regard to RQ3.4 in this case study, that brand books and brand manifestos - when integrated into a creative brief - add a strategic dimension to an IMC campaign, also addresses this research question. Agency Three is clearly committed to the strategic imperatives relating to the implementation of IMC for their clients. *It is also clear that Agency Three is not anchored at Stage 1 of Schultz and Kitchen's (2000a) Four Stage IMC Model.* R 3.41

4.4.8 Measurement and Evaluation of Effectiveness

In Agency Three responsibility for overseeing the evaluation of a campaign's effectiveness lies with the senior client service executive working on the brand.

"I run a team of account service people. I run a group of five, including Account Directors, Account Managers, and an Account Executive. As a team we run a group of clients and our job, quite simply, is to keep those clients happy. In terms of getting the work done: this includes managing budgets, managing timelines, managing revenue, coordinating research, working with planners in developing strategic points of view - but fundamentally the job is to make sure our clients are happy, and they are happy when they are getting work on time and on budget and it solves their business problems. Our clients don't have the patience for a six monthly deadline anymore. It is all very much about getting the brief, getting it done, getting it into the market, seeing if it works - and if it doesn't work, do something else; if it does work, keep it going." (Managing Partner) R 3.42

Agency Three regularly wins CAANZ New Zealand Effie awards for advertising effectiveness. To be successful in these competitions agencies are required to document

how the campaigns presented in their case studies perform against a number of effectiveness criteria. The New Zealand Effie's effectiveness awards criteria (taken from an Agency Three Effie case study) are listed below:

1. Outline the results achieved by the campaign against the objectives set.
2. Provide proof that it was the campaign that drove the results.
3. Outline the return on investment.

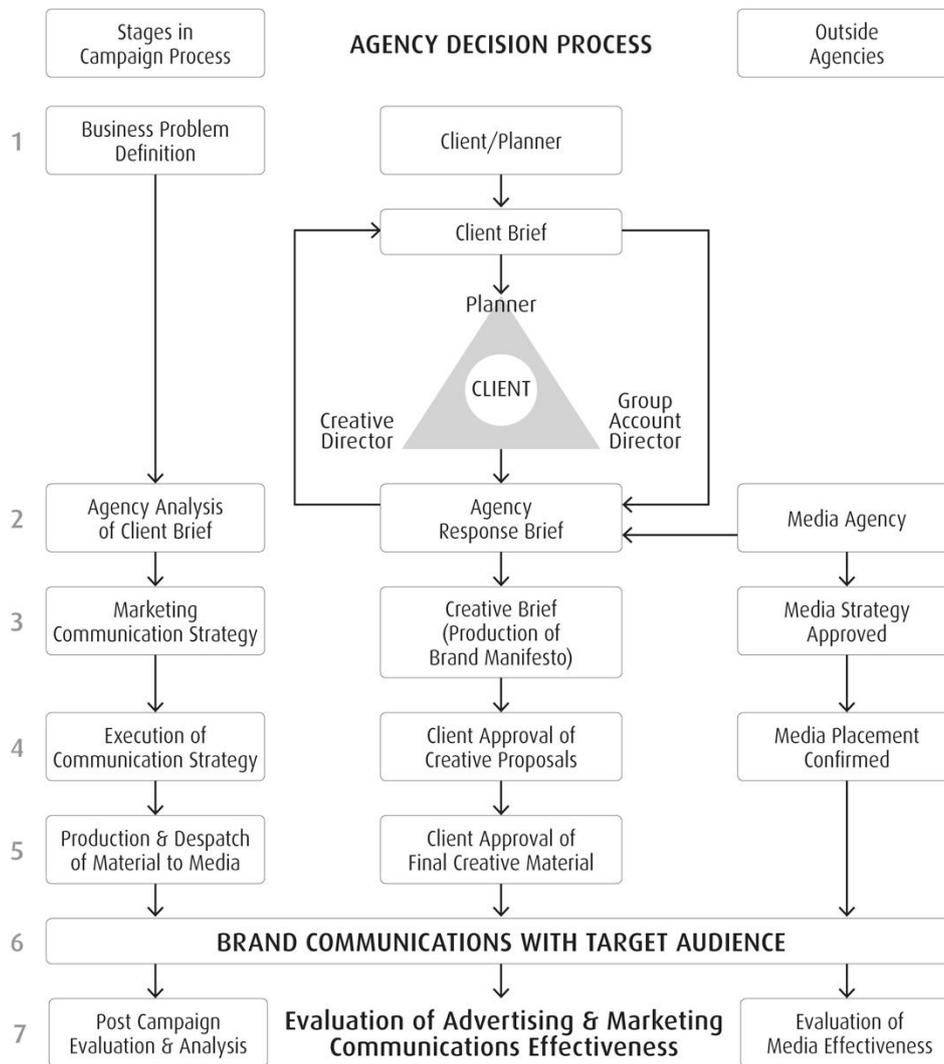
Typical campaign objectives reported by Agency Three include: increase reported brand awareness; increase the number of Facebook fans; increase the amount of Facebook exposure; increases PR coverage; increase trade engagement; increase product unit sales against historical benchmarks; increase sales value against historical benchmarks; increase market share against historical benchmarks and increase return on investment against historical benchmarks.

It can be concluded from the above comments that Agency Three's post-campaign effectiveness measures and analyses are consistent with the literature reviewed in Section 2.3.12.

A DSA chart for Agency Three will now be presented.

4.4.9 Summary Statement: Agency Three Decision System Analysis

Figure 4.9: Agency Three: Brand Campaign Creative Process



Source: Developed for this research

Figure 4.9 presents the DSA chart for Agency Three’s campaign creation processes. The process commences with the definition of the client’s business problem. In Agency Three the planner will often play a major role here, assisting the client to define what their problem is and what are the issues involved. The planner may even suggest (in a preliminary manner) ways that marketing communications might be able to help solve the problem. As a result of this collaborative interaction a client brief is written.

After receiving the brief from the client the agency will make an initial response to the brief, possibly reframing it or even getting the client to revise it. This response is generally undertaken by a planner and a Group Account Director, working in unison.

Once the brief is crystallised the planner will engage in extensive research, seeking to identify what market forces are involved in creating the problem, what target audience attitudinal and behavioural changes are required and what triggers will spark the desired response. Coming up with these triggers or consumer insights is a major responsibility of the planner. A great insight is identifying a big or small tension - an unresolved need, aspiration or desire - in the consumer that the product or service can resolve.

Agency Three typically establishes a functional triangular group of senior executives, a triad, to work together on the brief. It will include a Group Account Director, an Account Planner and a Creative Director. Together they interact with the client, examining the client brief.

The creative brief is the agency's formal response to the client brief. It is the role of the planner to turn the client brief into the creative brief. The agency's communication strategy to resolve the client's business problem is encapsulated in the creative brief. After the creative brief has been presented to the client and approved by them it is put into the creative Department. At the same time a media strategy is submitted to the client. Once the media strategy is approved by the client media bookings can be made by the media agency.

Agency Three will not submit a creative brief to a client or to the agency's Creative Department without a clear understanding and enunciation of the client brand's brand identity. This may be contained in a client brand book or, more likely, distilled into a brand manifesto. The brand manifesto is designed to be an inspiration to creatives and stakeholders, rather than a rule book. A fundamental prerequisite, understood by the agency, is that any big idea proposed to the client must be compatible with the client brand's core values and personality.

Next, creative proposals are derived from the creative brief and are presented to the client for approval. When they are approved final creative material is produced, signed off by the client, and despatched to the media.

The brand campaign will then appear in the media and the target audience will (hopefully) be engaged in a positive manner. They will respond individually.

After the campaign has run its course the evaluation of its effectiveness is undertaken. Results are measured against goals set in the client brief and media strategy documents; lessons are noted, changes are made and everyone moves on to the next challenge.

The above discussion is consistent with and illustrative of the DSA literature reviewed in Section 3.5.4.1.

4.4.10 Agency Three: Conclusions

In terms of the formal research questions that guide this study it is clear from the above responses that Agency Three account planners invariably refer to some form of brand identity statement in their formulation of IMC strategies for their clients' brands. As discussed above, sometimes these are in the form of a client brand book but more often the agency will create a brand manifesto from their client's brand book to encapsulate the brand's essential elements in a one or two page document, in order to provide a tight brief for agency creatives to work from.

This research also suggests that there are a number of common elements in Agency Three client brand identity statements. These include: the history of the brand, the function of the brand (what the brand does), the purpose of the brand (what the brand stands for and why it exists), the positioning of the brand, the brand's persona, the tone of voice of the brand, the brand's promise, the brand's core values and brand graphics.

In addition to the above this case study offers insights into the role that account planners play in the development and integration of a brand identity statement into the creative brief.

Although this case study has devoted less discussion to the roles that big ideas and target audience media consumption behaviour play as centres of integration in the integration of IMC, Agency Three participants nonetheless agree that these factors, along with brand identity, are all important drivers or centres of integration in the IMC process (illustrated in Figure 4.5).

The fourth case study will now be presented.

4.5 Case Study: Agency Four

4.5.1 List of Evidentiary Sources: Agency Four

For the Agency Four case, three senior Agency Four executives were interviewed by the researcher. They included the Managing Partner, a Creative Director/Partner and the Planning Director. Each executive was interviewed in-depth, in a semi-structured manner for approximately sixty minutes. The interviews were audio-recorded, transcribed and edited. The edited interviews were used as the basis for this study.

A single document was obtained from Agency Four: an Effie winning case study.

4.5.2 Agency Four Profile

Agency Four is a highly successful, independent, creative and design agency. In just five years the agency has earned a reputation for outstanding creative and design work, winning many local and international awards. It has won the Fairfax/AdMedia New Zealand Wildcard Agency of the Year award on several occasions and the B&T magazine Emerging Australasian Agency of the Year award. It is currently considered one of New Zealand's leading independent, medium-sized creative agencies.

The agency was established by four high profile partners who brought together many years of experience gained in diverse international markets such as Amsterdam, London and the United States, as well as in New Zealand. One of the partners is a graphic design specialist while two others are also Creative Directors. The Managing Partner is also the senior Client Service Director who manages the business, the relationships with clients and also the client service, planning and administrative staff. Agency Four partners with a number of independent media and digital agencies allowing them to provide their clients with strategic media advice, planning and placement.

Agency Four is committed to producing world-class advertising and design work for its clients; striving for superior creative thinking that will achieve outstanding business results. The partners interact directly with senior client executives and by doing so strip away the multiple operational layers that exist in traditional, large international agencies. This is possible because of a smaller number of selected clients on the agency roster.

4.5.3 The Role of the Account Planner in the Agency

This section addresses RQ1: What is the role of the Account Planner in the agency?

Agency Four has three account planners. Their fundamental role is to analyse a client's business problem and then suggest how marketing communications might help to solve that problem.

“The role of the Account Planner is to apply really clear thinking to the business problem, and to suggest how marketing communications might help to solve that problem. That includes uncovering valuable insights about the consumer - but it is broader than that; it is also about organising the process of responding to the client brief. Ultimately the role of the Account Planner is to distil the campaign strategy. And within the agency the Account Planner has to sell that strategy to both the client and also to the agency - to inspire good work.” (Managing Partner) R 4.1

Agency Four's Planning Director suggests that there are two kinds of planners:

“I think that there are planners who come from client-side researching - and they come at it from the data and they become almost an extension of the client's Marketing Department. Then there are planners like me who come from the more creative side. I think that the planner's role is to be an inspiration to the Creative Department. I have always worked really closely with my Creative Departments; I've sat with the Creative Director. My role is to inspire them; to write amazing briefs, to get the ideas working better, to contribute to the campaign, to do all the research myself, to sell the ideas, to nurture them, to protect them. Selling is a big part of my job and internally I think that's my biggest role.” (Planning Director) R 4.2

If the planner's internal role is to inspire the Creative Department their external role includes winning the trust and respect of the client at the highest level, so that their opinion is trusted and respected.

“A planner must win the trust and respect of the client at a really senior level. And that's what I try to do - so that my opinion counts. So I do a lot of work with my clients in terms of building that trust. I have lots of workshops with them. I try to educate them and share the knowledge with them. The usual workshops are for planning and for strategy. I run workshops around creative development. I am a planner that likes to involve everybody along the way and to collaborate a lot, so I have mini-workshops like that all the time. We look at best practice examples and worst practice examples; and there are also brand development workshops.” R 4.3

I am actually called Strategy Director now. It's not Planning Director any more. If you are a good planner, at a senior level, you are getting involved much more in the business strategy. My ultimate goal is to have a client or a business see me as a 'strategic advisor'- no matter what the issue is.” (Planning Director) R 4.4

In order to do this the planner must have an in-depth understanding of the client's business.

“The most important thing is that the planner has a really in-depth understanding of the client's business. They need to be really immersed in the client's world and to

understand that world. We have a process that we go through here which involves an intensive period of research and hands-on time with the client.” (Managing Partner) R 4.5

Agency Four’s Planning Director sees her role, ultimately, as a strategic advisor to the agency’s clients. In her view, strategy can cover a broad range of activities:

“I would define strategy as ‘bringing creative thinking to the business process’ and, secondly, ‘the ability to take in loads and loads of variables and turn them into something linear and tangible and usable and meaningful’. Lots of inputs - and being able to spit it out in a way that people find simple and clear and actionable.” (Planning Director) R 4.6

In Agency Four the role of the planner is more than just being the advocate within the agency for the consumer and being the person who understands the consumer better than anybody else in the agency - and it is more than just writing the creative brief; the rest of the job is to get the work completed, to work with the creatives and to provide input and feedback on their work; to sell it, to do the research, and to get it made. Writing the creative brief is just the first half of the job.

The role of the Account Planner in Agency Four is consistent with the role of account planners presented in the literature reviewed in Section 2.3.11.2.

4.5.4 The Role of the Creative Brief in the Creative Process

This section addresses RQ2: What is the role of the creative brief in the creative process?

In Agency Four the strategic and creative process is highly collaborative. The Managing Partner, the Planning Director and the Creative Directors all attend the initial briefing from a client for a major communications initiative. They will sit around the table together as equals. From the very first meeting the priority is to think strategically before they think executionally.

“The senior account service person works with a senior planner and a Creative Director in a symbiotic relationship of equal stature. A triangle of love! I can always tell when I go into an agency how good the planner is by what the creatives think. There are lots of creatives who don’t value planning, and lots of planners who just leave it there, and it’s not really of any help. Being able to foster a great relationship with the Creative Department is for me the difference between a really great planner and other planners.” (Planning Director) R 4.7

“It is a very non-hierarchical, close, collaborative working relationship. We have quite a formal, strategic briefing process and review process here - quite a structured way of processing work - but within that structure there are very informal working

relationships. We often have debates but we never have bitter debates; they can be very passionate debates. But it is always about 'What is the best idea? What is going to make the biggest difference?' There will always be debates over strategy. We brainstorm around the table." (Managing Partner) R 4.8

Although the role of the planner in Agency Four is to produce the creative brief the collaborative nature of this process means that there will be no surprises for creatives when the brief finally reaches them.

The Agency Four creative process is described by the Managing Partner as follows:

"Often it will start with a simple conversation about the client's business needs or a business problem or a communication problem. The creative brief can only be written once you have decided what the strategy is. Sometimes the client will come through with a creative brief for an ad - they have already decided that it is an ad that is needed - whereas it could be the last thing that is needed. We once won an advertising pitch for a coffee brand and after we had won the business, in discussion, we discovered that actually the last thing the brand needed were advertisements. We had to completely update the packaging! The packaging was all wrong." (Managing Partner) R 4.9

The creative brief is the agency's response to the client brief. Agency Four's preference is for a loose, more informal brief from clients. This allows them the freedom to discuss, explore, discern, clarify and define what the real issue and business problem might be; a result of interacting and brainstorming with the client.

"Client briefs are usually pretty loose, but that's the way we like to work. I don't know whether that is something that we have helped to cultivate, which is, 'Don't package it too tightly. Let's all chat about it first.' We often collaborate with the client at the client brief stage. We all have a chat about what they need to do and what the objectives are. And from that talk we will present a back brief to them, which is basically: 'This is our take on it; in our eyes this is what that conversation led to. Do you agree with this? Are you comfortable with this?' The back brief is a couple of pages long and it's usually just the objectives. It is tightening the task up slightly into what is the single most important thing we want to say." (Creative Director) R 4.10

The client will then sign off the agency's response to their brief and the next step is to create the creative brief. Agency Four believes that it is essential to get the client on board with the proposed strategy before starting any creative work.

Before creatives can be inspired by a brief they need to be sold on it. In Agency Four all creative briefs have to be approved by a Creative Director before they can go on to production.

“I have always found that one of the biggest jobs for planners in creative agencies is to sell the brief to Creative Directors, because the Creative Directors have to turn that strategy into brilliant creative work. So they are the first and most important audience for the brief. It has to be something that they believe they can do; work that they believe is going to make a difference.” (Managing Partner) R 4.11

In Agency Four, therefore, the role of the creative brief in the creative process is highly strategic. Although it is the task of the planner to write the creative brief in Agency Four, this is never done by the planner without consulting with and collaborating with the agency’s senior client service executives and creatives. This collaboration process begins with the receiving of the client brief and continues right through to the compilation of the communication strategy - which is contained in the creative brief - and even on to the implementation of that strategy.

The role of the creative brief in Agency Four is consistent with the literature reviewed in Section 2.3.11.3.

4.5.5 The Role of Brands in the Creative Process

This section addresses RQ3: What is the role of brands in the creative process?

In addition the section seeks to address four sub-questions relating to the role of brands in the creative process (RQ3.1, RQ3.2, RQ3.3 and RQ3.4). These questions will be addressed separately after RQ3 has been addressed.

In answer to the question, “How many of your clients have a brand book or a brand manifesto or a brand statement of some kind?” Agency Four participants answered as follows:

“All of our corporate clients do. Some of our smaller entrepreneurial clients don’t as yet. There are different models; some have brand pyramids, some have brand onions, some have brand manifestos, some have brand books. There are lots of competing methodologies and models for people to use to define their brands. All of our clients of any scale would have an articulation of their brand.” (Managing Partner) R 4.12

“All of our clients do. They are living and breathing their brand.” (Creative Director) R 4.13

“All of them. That’s part of my job. If they don’t have one then I’m not doing my job. If they don’t have one then I will make them one. It’s all about what is useful for the client. I am not at all precious in terms of what format it’s in. Every company has a different language and I think it’s about understanding what is going to work for that company.” (Planning Director) R 4.14

Some of the key elements that would be included in a brand manifesto or a similar brand statement by the Planning Director begin with a brand's name.

“Then there is the brand's positioning and the brand's values. These are universal. The brand's story is an important part of some manifestos; the brand's purpose can be important. It used to be more one-dimensional: like values, personality, benefits, essence. And I think that now it is almost like branding with a conscience. Now you are more inclined to see the inclusion of brand mission, brand vision, brand purpose. It is like people are trying to find more meaningful elements to include in these statements. It has gone from, ‘What makes up this thing?’ - like attributes; physical attributes - to now: ‘What is the role of my brand in the world? What does it add to people's lives?’ It is almost like we have to get the mission, vision, purpose included - and people are spending a lot more time thinking about how their brand relates to the world.” (Planning Director) R 4.15

Agency Four believes that senior client executives (such as CEOs and CFOs) are taking a much greater interest in their brands today than previously. Brands were once considered the exclusive domain of marketing people but today, with the advent of social media, people can access corporations a lot more freely.

“Corporate boundaries are being broken down - people can now access corporations on Facebook, for example. So the brand is the company now - more than it used to be. So more and more senior executives are now taking a greater interest in the brand. Why do they have to know these things? Because if they are in the social media and they are being hit up about bits and pieces by their customers, everyone in that company has to understand the ethos of what they are about - because they are the brand!” (Planning Director) R 4.16

In this regard the concept, ‘the conversation economy’, is increasingly gaining currency. The concept suggests that if people are not talking about what you are doing, you are probably wasting your money. Now that social media has given a company a facility to interact with their customers and to get immediate feedback from them, companies have the opportunity, in a positive sense, to co-create their brands in collaboration with their customers. Agency Four's Planning Director believes this is a positive development:

“I think it is exciting! It is moving branding into a whole new space. It is a conversation and it is a two-way thing. I think what is driving this trend is the desire for authenticity, which I think is really important. I think that this is why corporates are starting to talk about their brands in terms of their mission, values, and what is the brand's role in the world. New terms that we are starting to see now include brand map; ‘What is the brand's fight? What does the brand fight for?’” (Planning Director) R 4.17

Concepts such as brand fight and brand purpose are very similar and are effectively interchangeable. They lie at the heart of the brand manifesto concept.

“I like more descriptive, emotional language so brand fight is stronger to me. It’s like, ‘What does your brand fight for? What do you fight for? What would you fight for? What would you throw yourself in front of a bus for?’ I think it stirs more emotion than, ‘What is your purpose?’ It is a good way to communicate a story! R 4.18

I used to find with things like brand onions and brand pyramids that we were forcing our story into words and boxes. We are storytellers for goodness sake! Let’s just write the story!” (Planning Director) R 4.19

Agency Four’s Creative Director prefers to confine himself primarily to brand personality and brand voice as the key elements when defining a brand’s essence.

“How does that brand talk to people? Is it a friendly, conversational brand - or is it a brand that needs to maintain a little bit of respect so that people will listen to it? There are different brand personalities, which I find helpful to understand and to guide me in the way we should communicate with consumers. The brand will talk differently to different people but it is still the same person talking. You need to really understand that person (brand) and then you have the right to channel through them.” (Creative Director) R 4.20

Access to a brand identity statement in the form of a brand book or a brand manifesto is considered by Agency Four to be essential if their planners are to prepare creative briefs for their client’s IMC campaigns. This practice is totally consistent with the literature reviewed in Section 2.3.9.

The four RQ3 sub-questions will now be addressed:

RQ3.1: To what extent (and how) do account planners use a brand identity statement when formulating IMC strategy?

From the above comments it is clear that Agency Four requires some form of brand identity statement and an in-depth understanding of the key elements of a client’s brand to be present before effective marketing communications can take place.

“All of our clients of any scale would have an articulation of their brand.” (Managing Partner) R 4.21

“If they don’t have one then I will make them one.” (Planning Director) R 4.22

RQ3.2: What elements (for example: brand name, brand positioning, brand personality, brand values, brand graphics/logo) are included in any brand identity statement employed?

A text analysis of the responses by Agency Four participants to the research questions found that the following brand identity elements were mentioned: *brand name, brand personality, brand purpose, brand values, brand positioning, brand essence, brand story, brand vision, brand mission, brand role, brand map, brand fight and brand benefits*. R

4.23

RQ3.3: To what extent is a brand identity statement integrated into the creative brief?

In Agency Four a brand identity statement is the platform upon which a creative brief is constructed. In that sense, it is foundational to the creative brief. The implication is that any creative strategy must be in accord with and not incongruous to the client's brand. That is, it must be in accord with the corporate brand vision, brand purpose, brand mission, brand story and brand values.

RQ3.4 To what extent does corporate brand identity interact with and infuse product brand identity in brand identity statements used by New Zealand advertising agencies?

Although there is no simple answer to this question responses made by Agency Four participants to other research questions in this study offer clues as to what the answer might be.

Firstly, the agency's Planning Director, and other planners, are expected to acquire an in-depth understanding of their respective client's business. They are expected to win the trust and respect of the client at the highest level, so that their opinion is trusted and respected by the client. The goal is to get intimately involved in the client's business strategy - with the ultimate goal for the client to see them as a strategic advisor, no matter what the issue is. As a result Agency Four planners will often collaborate with a client at the client brief stage

Secondly, all of the agency's corporate clients have a brand book or a brand manifesto or a brand statement of some kind. According to Agency Four's Planning Director key elements included in these brand identity statements include the brand's positioning, the brand's values, the brand's story and the brand's purpose. These are elements that relate to corporate brand identity and provide a context for product brand identity (Kitchen et al. 2013).

“Now you are more inclined to see the inclusion of brand mission, brand vision and brand purpose (in a brand manifesto or a similar brand statement)... ‘What is the role of (this) brand in the world? What does it add to people’s lives?’ ... People are spending a lot more time thinking about how their brand relates to the world.”
(Planning Director) R 4.24

Brand mission, brand vision and brand purpose are expressions of strategic corporate objectives.

Vertical (IMC) integration requires that marketing and communication objectives be aligned with higher-level corporate objectives and corporate missions, whereas horizontal (IMC) integration focuses on the marketing mix and coordination across business functions such as production, finance, and distribution (Reid et al. 2005, p. 13).

As a result of the above statements this thesis argues, therefore, that corporate brand identity elements commonly interact with and infuse the product brand identity in brand identity statements used by Agency Four - as part of their process of creating IMC for their clients’ brands.

4.5.6 The Drivers That Integrate Marketing Communications

This section addresses RQ4: What are the drivers that integrate marketing communications?

As stated above, it can be concluded from discussions with Agency Four participants that a brand identity statement is one of the drivers or centres of integration that integrate their clients’ marketing communications.

“I would argue that integrated marketing communications rely on a brand idea that is everything: from its on-screen language to its graphical treatment. Our best work happens when we take a completely holistic view of the brand. Many of our clients can’t afford to compete through the mainstream media, but they still have to market themselves so we have brands who are very successful businesses but who don’t advertise. But they do communicate really strongly through every brand touch point, through their brand story and through their brand point of difference. So whether it’s through their packaging design or the story on the pack, or whether it’s through how they deal with their customers at the point of sale, or how they behave online; or even down to things like their shipping containers - every touch point is an opportunity to communicate with their customers” (Managing Partner) R 4.25

According to Saatchi & Saatchi (BBR Saatchi & Saatchi, 2012) a second driver of integrated advertising and marketing communications is a big idea. This proposition was put to Agency Four for comment. The notion that a big idea can sometimes become disconnected from the brand was also discussed.

“If you develop a strong idea as a platform you have to be open to look at which way is the best way to bring that idea to life, and it has to be strong enough and at a high enough level that it works across every medium. I think it works most powerfully as a conversation. R 4.26

Some big ideas fail because they are advertising ideas, not brand ideas. The big idea needs to be an appropriate expression of the brand. You need to understand the brand identity at the beginning of the campaign and you need to have the Creative Directors involved in that process. They have to understand the brand so that what they come up with - the big idea that they come up with - is totally consistent and integrated with the brand. The two need to be merged.” (Planning Director) R 4.27

Agency Four’s Creative Director agrees that the DNA of a big idea needs to permeate every form of communication that makes up a campaign.

“I think that in every campaign, every time that you are talking to a consumer, you need to have a strong enough idea - a core idea - that you can spread across multiple channels to create interactive dialogue. It needs a strong sense of purpose to drive that. (However) if the big idea is violently out of context with the brand message then it’s not a constructive thing.” (Creative Director) R 4.28

Agency Four agrees with the notion that there is a third driver of integration: the consumer. Agency participants agree that integrating the media around the targeted consumer is the third centre - or driver - of IMC.

“You need to include a Channel Planner in the process as well. Within Planning Departments in agencies now there are ex-media channel planners. Their job is to advise how to connect with consumers best - at what points along the journey. So agencies are starting to construct Planning Departments now with the Planning Director at the top, a guy with a research background, a super creative guy - with perhaps, for example, a music background - and they’ll have a Channel Planner included in an attempt to bring some of that media thinking back in-house.” (Planning Director) R 4.29

The proposition that the brand, the big idea and the consumer all interact with each other and jointly integrate a brand’s communications appeals to Agency Four’s Planning Director:

“This totally resonates with me.” (Planning Director) R 4.30

The Managing Partner agrees that if you take one of the three drivers out of the process you will have problems in one way or another.

“If you talk to the wrong consumer you will have a problem. If you have a big idea that has little connection with the brand you will have a problem. Or if you have a strong brand and you are targeting the right people but your wrong big idea has no cut through there will also be problems.” (Managing Partner) R 4.31

The above comments support the proposition, expressed in Figure 4.5, that there are three primary drivers of integration that together co-create IMC: brand identity, a big idea and target audience media consumption behaviour.

4.5.7 Strategic Versus Tactical Integration

This section addresses RQ5: To what extent is IMC, as practised by New Zealand advertising agencies, anything more than just ‘tactical integration’?

This thesis argues in Section 4.5.5 (in relation to sub-question RQ3.4), that in Agency Four corporate brand identity elements commonly interact with and infuse product brand identity statements used by the agency when creating IMC for their client’s brands. This research contends that brand mission, brand vision, brand purpose, brand story, brand positioning and brand values are all concepts that reflect strategic planning - or vertical integration (Peterson & Wang, 1996; Reid et al. 2005) - by Agency Four in the implementation of IMC for their client’s brands. These concepts are typically present in brand books and brand manifestos used by the agency in this process. This thesis argues, therefore, that these strategic dimensions provide guidance for all tactical actions by the agency; what Kerr (2003) calls ‘message integration’. *It can be concluded therefore that Agency Four is committed to the strategic imperatives relating to the implementation of IMC and is therefore not anchored at Stage 1 of Schultz and Kitchen’s (2000a) Four Stage IMC Model.* R 4.32

4.5.8 Measurement and Evaluation of Effectiveness

Agency Four evaluates the effectiveness of all work produced for its clients:

“We do it for every client, but in different ways, depending on what their definitions of success are. Obviously, for a lot of bigger clients we track their advertising using traditional measures like cut-through and correct message take-out, and what the advertising is achieving in terms of certain brand attributes. This is paid for by the client.” (Managing Partner) R 4.33

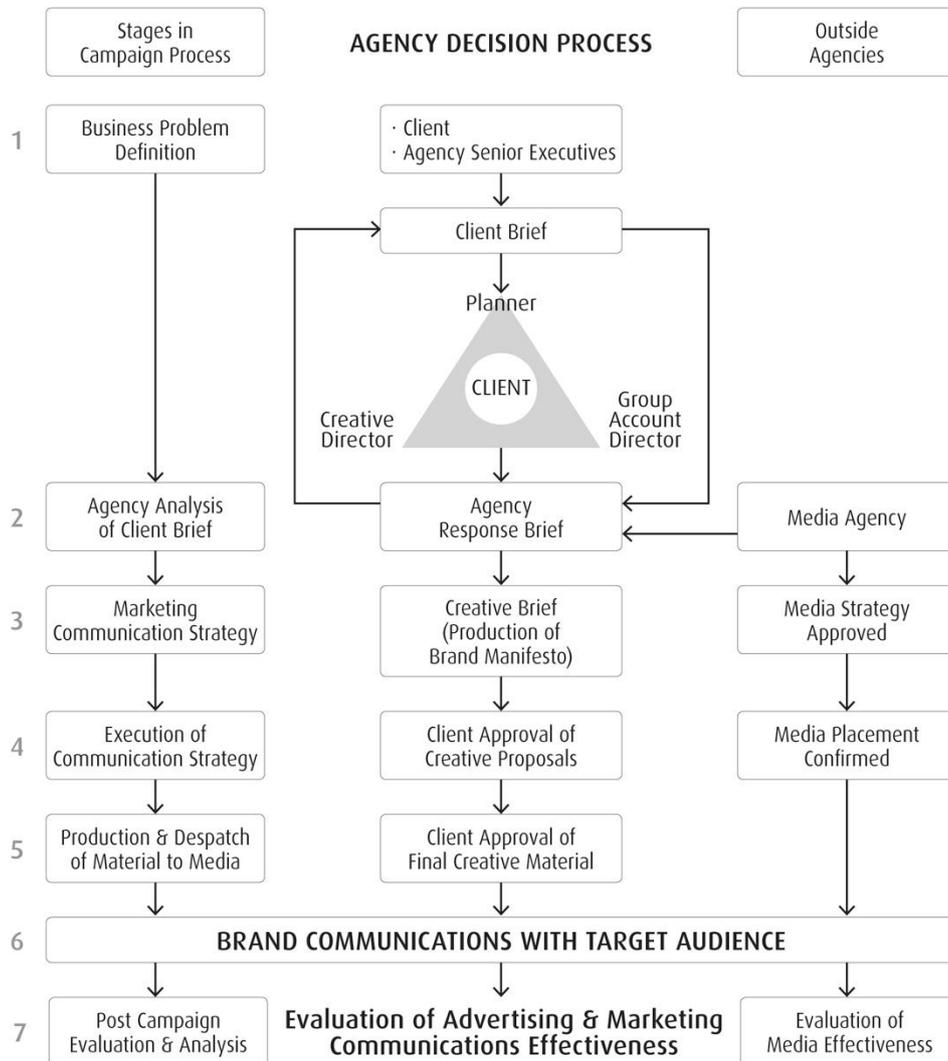
Like Agencies One, Three and Five, Agency Four is a regular winner of CAANZ New Zealand Effie awards for advertising effectiveness (Agency Two does not enter award competitions). In order to win these awards Agency Four must comply with the criteria detailed in Section 4.4.8.

Agency Four’s post-campaign effectiveness measures and analyses are consistent with the literature reviewed in Section 2.3.12.

A DSA chart for Agency Four will now be presented.

4.5.9 Summary Statement: Agency Four Decision System Analysis

Figure 4.10: Agency Four: Brand Campaign Creative Process



Source: Developed for this research

Figure 4.10 is a descriptive analysis of the decision making processes undertaken by Agency Four in the creation of a single marketing communication campaign for a single client brand. The flow chart models key decision points in the creative process.

Agency Four employs an abridged form of Agency Two’s Agency Day concept when it sets out to define what is the client’s business problem. Because the agency is deliberately boutique by design it is able to include all of its most senior executives in the initial briefing session with the client. For Agency Four this would normally include the

Managing Partner, the Planning Director and several of the agency's Creative Directors. Together they will take a day, if necessary, to interact with the client until their problem is crystallized. The client brief will emerge from this meeting.

Following the initial briefing session and the formation of the client brief a senior account service person will then work with a senior planner and a Creative Director in a symbiotic triangular relationship of equal stature to prepare the agency's response to the client brief. The first response is called a back brief or a response brief. This is usually just a couple of pages in length and focuses on the objectives for the campaign. This is signed off by the client and the agency proceeds on to develop the creative brief.

At this stage a media agency representative will probably be brought into the planning process. The priority at this stage is to think strategically rather than executionally. Fervent debate will occur over what idea will make the biggest difference and what strategy will create the best outcome for the client.

The role of the Account Planner in Agency Four is to analyse a client's business problem and then to suggest how marketing communications might help to solve that problem. This generally involves discovering a valuable insight about the consumer and incorporating this into the agency's creative brief. Ultimately this involves proposing a campaign strategy. Although it is the role of the planner in Agency Four to produce the creative brief this will be done in collaboration with a Creative Director.

Most of Agency Four's clients have some form of brand identity statement to articulate their brand. If not, Agency Four's Planning Director will construct one for them. This will usually be in the form of a brand manifesto. Any big idea or creative strategy proposed by the agency must be consistent with the client brand's brand identity statement.

Once the creative brief and the media strategy have been approved by the client creative proposals are produced and then approved by the client. Media placements are confirmed by the media agency. Final creative material is then produced and approved by the client before being despatched to the respective media organisations.

The campaign then appears in the media, the target audience is (hopefully) positively engaged and will respond positively to the communication.

Once the campaign is over evaluation of its effectiveness begins. Evaluations are made against the campaign's objectives, outlined in the client brief, and also against the media objectives contained in the media strategy document. Lessons from the campaign are recorded, necessary changes are made and then, ideally, incorporated into the planning of the next campaign.

The above discussion is consistent with and illustrative of the DSA literature reviewed in Section 3.5.4.1.

4.5.10 Agency Four: Conclusions

A review of responses by the three key Agency Four senior executives to the formal research questions that guide this study provides us with insights into current agency best-practice.

Agency Four account planners consistently use brand identity statements when formulating an IMC strategy for their clients' brands.

The brand identity statement is the cornerstone of the creative brief in Agency Four. It is mandatory practice for Agency Four account planners to use a brand identity statement as the starting point and the reference point for all strategic communications relating to the brand, contained in the creative brief.

Agency Four participants responded positively to the researcher's proposition that there might be three drivers or centres of integration that interact to co-create IMC at a tactical level: brand identity, a big idea and the identification of the target audience's media consumption behaviour (refer to Figure 4.5).

The fifth and final case study will now be presented.

4.6 Case Study: Agency Five

4.6.1 List of Evidentiary Sources: Agency Five

Three senior executives of Agency Five were interviewed by the researcher: the Director of Planning, the Group Executive Creative Director and the Head of Account Service. Each executive was interviewed in-depth for approximately sixty minutes, utilising a semi-structured interview method. These interviews were audio-recorded, transcribed, edited, and the edited transcripts then used as the key source data for the case study. A follow-up interview with the Director of Planning gained additional useful data.

Agency Five provided a range of helpful documents to the researcher including the following items: The Wheel Organisational Model (Figure 4.11), a Behavioural Change Philosophy document, The Art of Persuasion, the Strategic Kick Start template, a client brand manifesto example, a Campaign Brief example, an Effie case study, and a Behaviour Map example. As discussed in Section 3.5.4.2 these documents were examined by the researcher to cross-check and verify verbal evidence given by Agency Five participants. They were also analysed for additional insights into the philosophy and practice of the agency when developing IMC campaigns for their clients' brands.

4.6.2 Agency Five Profile

Agency Five is one of New Zealand's largest and most successful advertising agencies. Agency Five is a full-service multinational creative agency. It is a multiple winner of Agency of the Year titles and in recent years has won an impressive number of major new clients whilst maintaining the loyalty and building the businesses of long-standing existing clients.

Agency Five prides itself in delivering effective integrated solutions to clients' business problems. It is unique amongst the five agencies in this study in that it has retained an in-house Media Department. Beyond the essential strategic planning and creative services Agency Five offers in-house media planning and buying services, social media services, digital services, direct response services, public relations and community engagement services and brand activation services.

The agency's expertise in all of these specialist disciplines has been recognised by Best in Show accolades over the past five years - in effectiveness, creativity, media, social media, direct, digital and public relations - in New Zealand and international award shows.

4.6.3 The Role of the Account Planner in the Agency

This section addresses RQ1: What is the role of the Account Planner in the agency?

Agency Five has six planners. Fundamentally they are advocates for the consumer within the agency - but their role is much more extensive than that. They must understand the consumer in-depth and they must understand the client's business in equal measure. They are tasked with discovering consumer insights that will link the consumer to their client's brand and then represent the consumer throughout the entire creative process. They must come up with a strategic plan that will solve the client's business problem, and they must integrate that plan into the creative brief. The creative brief, in turn, must inspire the creative team to produce relevant, effective and memorable ideas that will help to achieve clients' business objectives.

“The planner should be the consumer's advocate. They have probably got more focus on what consumers think than anyone else in the agency. Obviously, media people have tools that actually allow them to tap into consumer habits, but I think that planning is much more about what people are thinking, what they are feeling and what their true behaviours are around the category. Of course the whole industry should be consumer advocates, but the reality is that that responsibility rests with a planner more than anyone else because that's their focus. They are the ones who are trying to create a relevant starting point for how to solve the problem. The creative brief is a key output of the planner and the consumer insight is fundamental to making that brief relevant.” (Creative Director) R 5.1

“The planner's role is to try and bring some clarity and simplicity to a wide-ranging group of inputs. Traditionally they would be called ‘the voice of the consumer within an agency’. But more and more they now have to take into account the business side of the client's business, being able to understand the client's business objectives and the market that they are operating in; balancing that up with consumer insights and then balancing that up again with something that will be a good springboard for the creative team to work off.” (Head of Account Service) R 5.2

“Account planning is about developing strategy; figuring out what we are going to say and who we are going to say it to, and what we want to get them to do when they have seen or heard or encountered our message, and how that is going to help our clients' business objectives.” (Head of Planning) R 5.3

Agency Five planners provide strategic support to client marketing teams and are directly involved in all major brand and communication projects. According to Agency Five's Head of Planning different clients have different planning needs.

“You will have some clients with whom you will be intensely busy figuring out their brand and their direction for a month, or two months, and then you might not do much planning for them again for a year. And then you have other clients with whom

you are intensely developing strategy all of the time. So the way our team works is this: the bigger clients tend to have planners who are consistently involved with them, so that they know their business and they know the challenges that the client is regularly facing. Then there are other projects that shift around according to who has the relevant skills or time at that stage. One of my planners has a research background so he is more likely to get research projects. Then we have one person who comes from a media background and the clients that they work on need to have a planner that can cross over from general strategy to specific media channel planning strategy. I have another planner who comes from a digital and direct background and he works with clients that do more digital and direct work. So that's the general structure of things.” (Head of Planning) R 5.4

Agency Five frequently uses focus group research to gain consumer insights. In addition the agency has a number of unique, proprietary, consumer research tools that they customise to meet the individual needs of different clients. The agency's social media specialists provide expert analysis and insights when a client is faced with social media issues that need understanding and resolution.

Agency Five's Head of Planning suggests that the following personal qualities are necessary if a person is to become a successful planner:

“They have got to be intelligent for a start. An ego isn't as useful as it might be in other careers. You don't become a planner because you want to be the guy that came up with the idea; you want to be the person that helped that idea come out - and you don't care whose idea it is. One of the skills that we have to have is the ability to facilitate things, so you have to be a really good listener. Listening to the people you work with and to clients is something you do more of than actually sitting in focus groups. R 5.5

Focused curiosity and intuition are also important. Intuition comes from experience; intuition is not some skill or something that you have in your genes, it is learnt from experience. Someone who has encountered the same sort of problem, albeit manifested in different forms over the years, can draw on that experience. I think that a planner has to be able to refer to examples off the top of their head all of the time because otherwise you get lost in textbook theory. I am talking about examples of how brands are positioned and examples beyond advertising.” (Head of Planning) R 5.6

Agency Five's Group Executive Creative Director lists the following characteristics of a good planner:

“I think that the more planners have a high degree of self-awareness and the more that they are interested in and can relate to people of any demographic I think the more they are going to be able to draw out great conclusions. We are highly dependent upon planners to have really open radars, to be highly intuitive as well as being able to pick through data and reports and define fresh, relevant insights - more than people would think of just through common sense. It is a really demanding job

because as much as one might think of it as a science, it is a highly creative part of the business. R 5.7

If I was the Head of Planning and looking for people to join my team I would look for curious people; I'd look for people who like people; I'd look for people who are articulate. In addition I'd look for people who are able to analyse data. That is required I think because otherwise you just run on your gut instincts. R 5.8

But within those characteristics I do think that to be highly intuitive is a really important thing. But also, someone you like. Because people who you like are people who you want to work with, for a start, but when it comes to getting information and drawing information from reluctant people - whether it's consumers, whether it's clients, whether it's people who work the client's business - if you are not likeable it is harder for people to actually engage with you. Therefore they are going to be less open about the information they give you - and everything is determined by the quality of information that grounds our starting point. So those various human qualities are really important, and then there's going to be the technical side of it." (Creative Director) R 5.9

Does this imply that a planner needs to be an experienced advertising professional before they can contribute significantly?

"As a planner you get put in a room with a client and it isn't just about presenting your idea, it's about the conversation you have with your team members and your clients. So to have someone in there who is very young and inexperienced doesn't make sense. There is no such thing as a junior planner. An older person's words carry more weight. It is just how human nature works." (Head of Planning) R 5.10

Agency Five uses an organisational model called 'The Wheel' to illustrate the different roles that agency executives play in each team that services a particular client (refer to Figure 4.11).

Figure 4.11: Agency Five: The Wheel Organisational Model



Source: Agency Five

At the centre of The Wheel, for each client, is an Account Director. The Account Director is the agency’s Team Leader on a piece of business. The planner, like everyone else, reports to the Account Director.

“The Account Director is responsible for keeping the client happy, for keeping creatives happy - for keeping everyone happy! The agency must do effective work but they have also got to make money. So the Account Director, with all those responsibilities, in order to deliver them, must have sufficient authority. The reason why I say that ‘I work for the Suit’ is because they have to balance my opinion up with the political and economic realities of working with a particular client. They appreciate my advice because I have the benefit of not being bogged down by those things.” (Head of Planning) R 5.11

The Head of Account Service described the relationship between planners and account service executives as follows:

“Their roles are very collaborative. Ultimately the account service person is like a mini CEO running a group of accounts, concerned with profit and loss, choosing who to bring in when - and making the ultimate decisions on who to listen to or not. But planners add so much value to the business that account service people would be very foolish if they did not really listen to them and try to engage them and to seek their point of view. Ultimately, however, the client is the boss so whatever is developed by the agency needs to meet the client’s needs and needs to be signed off by them. So if a planner goes off in a random direction and cannot justify that then it’s not going to go ahead.” (Head of Account Service) R 5.12

The Group Executive Creative Director made the following additional comments concerning the role of the Account Planner in Agency Five:

“The responsibility of a planner is to break down the problem, to unlock the problem in a way that a creative person can’t, because they are probably more focused on execution - and in some ways the suit won’t because the suit is just trying to get work through as profitably as possible. The planner is there to unlock the problem, to break it down and to find the most relevant angle to enable a creative leap.” (Creative Director) R 5.13

In Agency Five a planner’s role includes research, formulating strategy and the facilitation of that strategy through to production. The agency makes a distinction between formulating brand strategy and formulating campaign strategy:

“Figuring out what the brand stands for involves a much bigger picture. That is when you are talking about lasting human insights and what the brand has always been about, or is going to be about for many years into the future, versus a campaign strategy which is how we are going to change behaviour, or sales, or whatever, this year or for a few years to come.” (Head of Planning) R 5.14

It is clear from the above discussion that the function and role of the Account Planner in Agency Five is completely consistent with the function and role of account planners depicted in the literature reviewed in Section 2.3.11.2.

4.6.4 The Role of the Creative Brief in the Creative Process

This section addresses RQ2: What is the role of the creative brief in the creative process?

Agency Five has three different categories or tiers of creative brief with different templates for each category:

“You could categorise the three briefs as ‘fresh’, ‘familiar’ or ‘fast’. A ‘fresh brief’ is something that requires completely new thinking and needs to go through an

integrated process. We need to involve thinkers from every discipline within the agency. So it's a bigger brief. A 'familiar brief' is an additional execution of an existing campaign. A 'fast brief' is a brief where the most important thing is getting to market really quickly - and that is often in response to a competitor's move. It requires a really quick retail offer. It's just about retail basics. Planners would be involved in the 'fresh brief' but not the 'familiar brief' or the 'fast brief'." (Head of Account Service) R 5.15

In Agency Five most day to day creative briefs are written by account service executives but briefs for major projects are always written by planners. Planners will normally approve all briefs.

"Most often it would be the account service person who takes the client brief, but if it is a major project then they will sometimes invite the planner or the Creative Director along to the brief. But what is happening more and more often now is that even before you get a brief from a client you will have a workshop or a working session (a Client Brief Workshop) to work out what you are trying to solve and what the business problem is. That session would be led by the planner and the client would be involved." (Head of Account Service) R 5.16

The Head of Account Service believes that traditionally people would say that "The Creative brief is the most important document in the agency" - but today that statement would be qualified somewhat:

"From what I know of how creatives work they don't work off a written document. I see the creative brief as a discipline to simplify and clarify what needs to be achieved, which is then used as a springboard for a discussion with the creative team, because most of them don't take information in through a written document. They don't refer back to that much - but it is a springboard to inspire them. The creative brief is something to refer back to, but it's most important role is to clarify agency thought processes into more simple and precise terms. For example, 'What is the business problem? What do we need to achieve?'" (Head of Account Service) R 5.17

According to both of Agency Five's Head of Account Service and Head of Planning a lot of clients don't write briefs at all:

"Clients are evolving. A lot of clients don't give proper briefs anymore or don't provide a brief at all!! We create it and then present it back to them. We always get the client to sign it off." (Head of Account Service) R 5.18

"A lot of clients aren't writing briefs at all. A lot of them don't like briefs. In fact in our ideal process we would say that we don't want the client to write the brief as the first point in this process. We would much rather prefer to just sit down and talk about the business problem first, because often a client will write a brief and that predetermines some things which you don't want to be predetermined. That is, from 'what product is going to be promoted', to 'what is the message and benefits', through to 'the channels you are going to use'. If a client has committed all of those

things to writing, and has had all of their team sign off on it - including their boss - and they come to us and we have a better idea, then that is going to be quite difficult to change. R 5.19

Everyone works in different ways. The ideal process for us would be to start with a conversation with the client about what information we really need from them and what needs to be left open, because really you just want information and it shouldn't even be called a brief. In fact if I was very cynical I would say that the only things we absolutely want are 'timing' and 'budget', because these two things are probably the least likely to change. And we probably need some kind of 'political purpose'; for example, if they say that they have to have this done for their AGM or for their new CEO or because their competitors are launching a new product and they will get chucked out by the retailer if they don't support their product with a campaign. So we need that kind of context." (Head of Planning) R 5.20

The agency then likes to introduce a 'Strategic Kickstart Session'.

"Our planners most often chair these meetings. They are really good facilitators. Sometimes in those meetings we will involve people from media, people from digital, and people from different parts of the client's organisation." (Head of Account Service) R 5.21

"This is a discussion which includes the client where ever possible. It is very useful and it will often illuminate a creative approach to the strategy; it throws up a whole lot of potential ideas - without anyone having to make a decision in that session. Then a small group, including the client again, will get together and make a decision about what strategy is going to be recommended (we talk about a 'strategic angle' as opposed to a brief) and that strategic angle is presented to the client. We tell them what we are going to do, and if it's right we will turn it into a creative brief. The creative brief is signed off by the client and will then go not just to creatives but also to media and to PR and to digital, so that every channel is covered. We will brief all those people at the same time because although in most cases creative will be where the idea develops there have been some really successful ideas that have been driven by media thinking." (Head of Planning) R 5.22

It is evident from the above discussion that the role of the creative brief in the creative process employed by Agency Five is entirely consistent with the literature reviewed in Section 2.3.11.3.

4.6.5 The Role of Brands in the Creative Process

This section addresses RQ3: What is the role of brands in the creative process?

In addition the section seeks to address four sub-questions relating to the role of brands in the creative process (RQ3.1, RQ3.2, RQ3.3 and RQ3.4). These questions will be addressed separately after RQ3 has been addressed.

Most of Agency Five's clients have some form of articulation of their brand.

“All of our clients have a brand book or a brand manifesto or a brand identity statement in some form. Whether it’s a brand book or not - some of them just have manifestos. Some of them have very extensive brand books. They all have brand personality statements for their brands and statements of what the brand stands for - and that, ultimately, guides everything that we do for them. We should never do anything that does not fit into the brand framework. The brand framework is like a checklist that we refer to - unless the brief is to move the brand onto somewhere new.” (Head of Account Service) R 5.23

However, in practice, many client marketing executives consign existing brand platforms to the filing cabinet and will only dust them off and review them when they want to change them. The Head of Planning made the following comments:

“I will go out on a limb here and say that most brand platforms that are developed don’t go far beyond the Marketing Department and far beyond the month in which they are developed collaboratively by the marketing team. What typically happens is a new marketing team comes along and they go, ‘Well, we should review the brand!’ And, unfortunately, human motivation being what it is, there is usually nothing in it for the new marketing leader to say ‘I’m going to keep what exists’ as time and years go by.” R 5.24

The conversation seems to go too readily to ‘How can we make this better?’ Or, ‘This isn’t quite right for the times now.’ And they will chase the idea of perfection in the brand positioning when it is not worth nearly as much as consistency in brand communications. In fact consistency, and repetition are way under-valued by modern marketing and advertising executives. People are much more likely to think something is true if they hear it more often.” (Head of Planning) R 5.25

The Head of Planning believes that although all brands change over time consistency is about making sure that the changes are so slow as to be almost invisible.

“However, when you are talking about consistency with a campaign you are talking more about short periods of time across various touch points. And the way that we tried to do that is by expressing the brand in terms of a ‘core purpose’; that is, what it is trying to do for its audiences, or the world, or the country, or whatever. And if the campaign is trying to do that as well then there is immediately some alignment between the two.” (Head of Planning) R 5.26

The above comments by Agency Five’s Head of Planning, relating to changes to brand platforms, are endorsed by the Group Executive Creative Director.

“I think that a lot of marketers don’t necessarily have their brands etched in stone - and of course there is a very quick turnaround of marketers these days. Around the world they talk about it as being about an 18 month tenure. So it comes down to the quality of the individual to respect what has gone before, as opposed to: ‘I’m only here for a short time so I need to leave my mark in order to advance my career’.” R 5.27

And of course companies have multiple brands. The amount of focus that a marketer needs to be able to give to actually say, 'This is what my sub-brand actually stands for' is not always possible. I'm surprised how often they don't have a brand statement - and even when they do put one together it is not necessarily something that lasts for a long time. R 5.28

I think that if your brand chops and changes a lot you are in trouble. Even if a client says, 'I want to put a stake in the ground - this is what the brand stands for', selling that through to the organisation is actually quite hard, particularly if the brand has developed a relatively schizophrenic personality over a number of years." (Creative Director) R 5.29

Agency Five's Group Executive Creative Director believes that the way that people consume brands today is different from previous years. Marketing communications is only one part of the total brand experience.

"If you look at a retailer, the brand experience is way beyond experiencing just their marketing communications. Until you actually go into their store, or call their call centre, or go to their website, you are just being passively exposed to their brand personality via their marketing communications. All of these additional things are potentially great brand experiences - and seeing what the company does in terms of corporate social responsibility is also part of that wider brand experience. Brand experience is a very rounded view of all of the aspects of a brand and the ways that a brand might engage with its consumers. Even when something goes badly wrong, the way that the retailer manages that is also part of the brand experience." (Creative Director) R 5.30

According to Agency Five's Group Executive Creative Director marketing communication is now all about 'brand purpose'. Brands must be very clear about their purpose and they must be authentic in the way that they behave and the way that they communicate. They must be totally consistent in all that they do. There needs to be clarity of purpose about what the brand actually stands for in order for it to be meaningful and authentic to consumers.

"Without clarity of purpose you will have schizophrenic actions - not just at a marketing communications level - but in the way the brand displays itself at a retail level, the way it actually trains its sales staff and the way that it buys products to deliver to customers. I think that without that clarity of purpose the brand doesn't really know what it is trying to do and therefore there is a lot of wastage. Clarity of purpose is crucial. The whole essence of strategy is that there is an element of sacrifice to it. Therefore, when you define your strategy you decide that you are going to focus on certain directions and will forego other directions, in order to have clarity. R 5.31

I think that without a brand intuitively knowing how it should behave in any given situation the consumer could potentially have brand experiences which are at odds with each other. R 5.32

Unfortunately, I think that it is very hard for brands to think long-term now. I think that the fact that business operates on quarterly results means that people are actually operating very tactically. I think that even bigger brands are highly reactive. In the end most brands are retail because they actually have to sell stuff. I think that if marketers have half an idea about what a brand stands for then they get tactical really quickly. Because the long game is expensive and somewhat hard to prove and to justify the investment - with tactical activities you can show results straight away. But the more noble aspects of brand management just go out the door!" (Creative Director) R 5.33

Agency Five is an enthusiastic advocate of the brand manifesto. The agency uses the manifesto in conjunction with a 'brand on a page' template (Appendix 2.5). This is where all the information about a brand is on a single page - akin to an Executive Summary. For this reason a brand on a page has great appeal to CEOs and CMOs because it is highly structured and organised and they can read it at a glance. A brand manifesto puts that information into layman's language and makes it read like a story.

"I like to say that a manifesto can be in a boardroom or it can be in your reception; it is something that a consumer or a business partner or a supplier - or anyone, could pick up and read and understand what you are about as an organisation and as a brand. The brand manifesto is not going to say that 'It is our ambition to increase our bottom line profit by 'x' percent this year'; it is going to say that 'We exist to help New Zealanders to achieve... (something meaningful).' We exist to help achieve this core purpose. R 5.34

I think that the purpose thing is really important for a brand or a person and if you are a person who works for that brand it can do both jobs. And customers can smell the brand that has a purpose other than taking their money." (Head of Planning) R 5.35

The Head of Planning cites management theorist Jim Collins in this respect. Collins argues that a company's practices and strategies should change continually but its core ideology should not. A core ideology is based on an organisation's core values and its core purpose; its most fundamental reasons for being. The core purpose never changes and can never be completed (for example: Disney's core values are imagination and wholesomeness; its core purpose is to make people happy). Collins contends that a core ideology and a clearly defined, durable vision characterise companies that are built to last (Collins & Porras, 1996).

“The brand manifesto is rooted in the corporate vision and core values. The brand manifesto is articulating these elements in non-marketing language. But the ‘brand on a page’ statement is absolutely a marketing statement.” (Head of Planning) R 5.36

Agency Five’s Head of Planning suggests that a brand manifesto talks about the heart and soul of a brand in layman’s language and, most importantly, describes the core purpose of the brand - why the brand exists - in layman’s language. That is, what the brand does for its customers. These characteristics distinguish a brand manifesto from a brand on a page statement.

The above practices by Agency Five are totally consistent with the literature reviewed in Section 2.3.9.

The four RQ3 sub-questions will now be addressed:

RQ3.1: To what extent (and how) do account planners use a brand identity statement when formulating IMC strategy?

It is clear from the above discussion that most, if not all, of Agency Five’s clients have some form of brand identity statement. The agency is enthusiastic about the brand manifesto format:

“All of our clients have a brand book or a brand manifesto or a brand identity statement in some form. Whether it’s a brand book or not - some of them just have manifestos. Some of them have very extensive brand books. They all have brand personality statements for their brands and statements of what the brand stands for - and that, ultimately, guides everything that we do for them.” (Head of Account Service) R 5.37

“Most of our clients have some form of articulation of their brand, but how fresh it is and how familiar it is and how shared it is and how deeply it goes into the business varies greatly.” (Head of Planning) R 5.38

“We use brand manifestos. A manifesto is something that anyone can pick up and read and understand what you are about as an organisation and as a brand.” (Head of Planning) R 5.39

RQ3.2: What elements (for example: brand name, brand positioning, brand personality, brand values, brand graphics/logo) are included in any brand identity statement employed?

A text analysis of the responses by Agency Five participants to the research questions found that the following brand identity elements were mentioned: *brand name, brand*

personality, brand purpose, brand values, brand positioning, brand story, brand vision, brand authenticity and brand consistency. R 5.40

RQ3.3: To what extent is a brand identity statement integrated into the creative brief?

It has been noted in the above discussion concerning RQ3.1, that all of Agency Five's clients have some form of brand identity statement. It has also been noted that it is standard practice for the agency to incorporate these brand identity statements into creative briefs for their clients' IMC campaigns:

"All of our clients have a brand book or a brand manifesto or a brand identity statement in some form. Whether it's a brand book or not - some of them just have manifestos. Some of them have very extensive brand books. They all have brand personality statements for their brands and statements of what the brand stands for - and that, ultimately, guides everything that we do for them." (Head of Account Service) R 5.41

RQ3.4 To what extent does corporate brand identity interact with and infuse product brand identity in brand identity statements used by New Zealand advertising agencies?

Agency Five participants believe that without 'clarity of purpose' a brand's communications are seriously compromised:

"Without clarity of purpose you will have schizophrenic actions in the way the brand displays itself. Clarity of purpose is crucial. The whole essence of strategy is that there is an element of sacrifice to it. Therefore, when you define your strategy you decide that you are going to focus on certain directions and will forego other directions in order to have clarity. R 5.42

I think that without a brand intuitively knowing how it should behave in any given situation the consumer could potentially have brand experiences which are at odds with each other." (Creative Director) R 5.43

The agency is an enthusiastic advocate of the brand manifesto because the brand manifesto is a clear statement of the core purpose of a brand:

"The brand manifesto describes the heart and soul of the brand. Most importantly, it describes the core purpose of the brand: why this brand exists and what it does for its customers." (Head of Account Service) R 5.44

"A manifesto can be in a boardroom or it can be in your reception; it is something that a consumer or a business partner or a supplier - or anyone, could pick up and

read and understand what you are about as an organisation and as a brand. The brand manifesto is going to say that we exist to help achieve this core purpose. R 5.45

I think that the purpose thing is really important for a brand or a person and if you are a person who works for that brand it can do both jobs.” (Head of Planning) R 5.46

It has been noted above that Collins and Porras (1996) argue that a company’s practices and strategies should change continually but its core ideology should not. An organisation’s core ideology is based on its core values and its purpose; its most fundamental reasons for being. In Section 2.3.7 these elements are identified as being fundamental to an organisation’s corporate brand identity (Abratt & Kleyn, 2012; de Chernatony, 2010; Kitchen et al. 2013; Olins, 2007; Urde, 2009). This thesis therefore argues that when Agency Five uses a brand manifesto as a platform for a creative brief it is implicitly facilitating the interaction and infusion of a client’s corporate brand identity with its product brand identity.

4.6.6 The Drivers That Integrate Marketing Communications

This section addresses RQ4: What are the drivers that integrate marketing communications?

It is clear from the above discussion that most, if not all, of Agency Five’s clients have some form of brand identity statement and that this statement is the cornerstone for all of their clients’ brand communications. For Agency Five a brand identity statement is a key driver of a brand’s IMC.

A second driver of IMC of interest to this research is the concept of the big idea.

“A truly integrated campaign involves a strategic idea which solves a problem -and it doesn’t matter what channel is used to execute it.” (Head of Account Service) R 5.47

The Head of Account Service suggests that if the creative expression of that strategic idea does not fit with a brand’s core identity the consequences can be quite damaging to the brand:

“I think that if the big idea is disconnected from the brand you probably shouldn’t proceed with it. Because big ideas are exciting it is easy to get swept away by them, and that is why it is so important to step back and look at the bigger picture and asked the question, ‘Is this campaign worth going against our core brand and what we stand for or is our core brand purpose out of date? Does it need to be updated?’ So it is something that would have to be very carefully evaluated. I think that it is probably an area where agencies sometimes fall down - because they get too carried

away with the big idea. If an idea doesn't fit with what the brand is about then it's probably not going to work; it's going to do damage to the brand." (Head of Account Service) R 5.48

This view, that there needs to be consistency between the brand and the big idea, is supported by the Executive Creative Director:

"I think that if there is a disconnect on any level around whether that amazing big idea is right for the consumer or right for the brand then I don't think people will intuitively bond with it. Having said that I'm sure that there have been plenty of big ideas that were just random yet consumers responded in huge numbers because they just didn't care about brand authenticity. I think that often people actually forego brand authenticity just to get a bargain - which is kind of disconcerting to people who work in this business, because you would actually like to think that authenticity has high value. But I think that sometimes consumers are very pragmatic." (Creative Director) R 5.49

For Agency Five a really good idea is part of the answer to the question, "How do we integrate IMC?"

A third driver of IMC of interest to this research is the consumer themselves. Agency Five participants agree with the assertion that the media consumption behaviour of the target audience, of the consumer themselves, is a third centre of integration of a brand's marketing communications.

"Yes, that's interesting. Obviously you try to find out as much as you can about the target audience consumer; where you can reach them and what their mind-set will be when you reach them. We have some amazing people in our media team who do just that." (Head of Planning) R 5.50

The above comments support the proposition, expressed in Figure 4.5, that there are three primary drivers of integration that together co-create IMC: brand identity, a big idea and target audience media consumption behaviour.

4.6.7 Strategic Versus Tactical Integration

This section addresses RQ5: To what extent is IMC, as practised by New Zealand advertising agencies, anything more than just 'tactical integration'?

This thesis argues that Agency Five's use of brand manifestos when planning IMC campaigns for its clients' brands demonstrates the agency's commitment to incorporating core corporate identity elements such as an organisation's purpose and values into the brand strategies for these campaigns. This commitment supports the contention that for Agency Five the implementation of IMC for their clients is indeed a strategic business

process that provides guidance for tactical actions (Duncan & Moriarty, 1998; Duncan & Mulhern, 2004; Reid et al. 2005; Schultz & Schultz, 1998). *Certainly, Agency Five is not anchored at Stage 1 of Schultz and Kitchen's (2000a) Four Stage IMC Model.* R 5.51

4.6.8 Measurement and Evaluation of Effectiveness

Agency Five frequently wins CAANZ New Zealand Effie awards. These effectiveness awards require the agency to provide evidence of results achieved by the campaign against objectives set; to provide proof that it was the campaign that drove the results - that the results were a direct consequence of the campaign; and to provide details of a superior financial return on investment for the client as a result of the client's investment in the campaign. This accountability process is not unusual and in fact is quite normal for Agency Five.

Agency Five is ultimately committed to creating positive behaviour change in the purchase behaviour of target audiences for their clients' brands.

“Changing attitudes does not necessarily change business results; changing behaviour does. Changing attitudes or brand perceptions is a very important, measurable objective - but ultimately if it does not influence behaviour in the long term, it is ineffective. But we know that if Coca-Cola don't keep attitudes around their brand positive people will gradually buy less of their product. So what we are saying is that the end game is always behaviour change, but there might be a really long time when all you can do is influence attitudes and you are actually only going to maintain levels of purchase behaviour.” (Head of Planning) R 5.52

Agency Five's Head of Account Service outlined the agency's commitment to post campaign evaluation and analysis:

“Nothing is mandatory but for most of our clients we have a quarterly review, a quarterly update, where we will go through their campaigns and evaluate their effectiveness and get the sales results. Not all clients are willing to provide in-depth sales results because it is sensitive information. R 5.53

We have 'dashboards' for clients. A dashboard is basically a top-level single page spreadsheet that shows what has been happening in the past month. That is, sales results; campaigns that have run; competitor activity; inbound calls to call centres; visits to retail outlets, etc. It is just a results monitor. There is also a campaign review form that we are supposed to fill in at the end of each campaign, but it doesn't always happen. R 5.54

Media results aren't really results because they are based on whether or not the campaign achieved the planned number of impressions or tarps, or whatever. With digital media you do have 'click-through' rates and, hopefully, what will happen more and more now is the integration of recorded visits to client websites and

recorded visits to their stores, so that you can see the complete 'track-through' to what the effect was on the client's business bottom line. R 5.55

There are success measures in the client brief. We always have a 'go-to' question in the brief which is 'What do you want to change?' So there's a measurable objective in that. Depending on the job, there are different ways to measure that. We are pretty focused on trying to measure that outcome. R 5.56

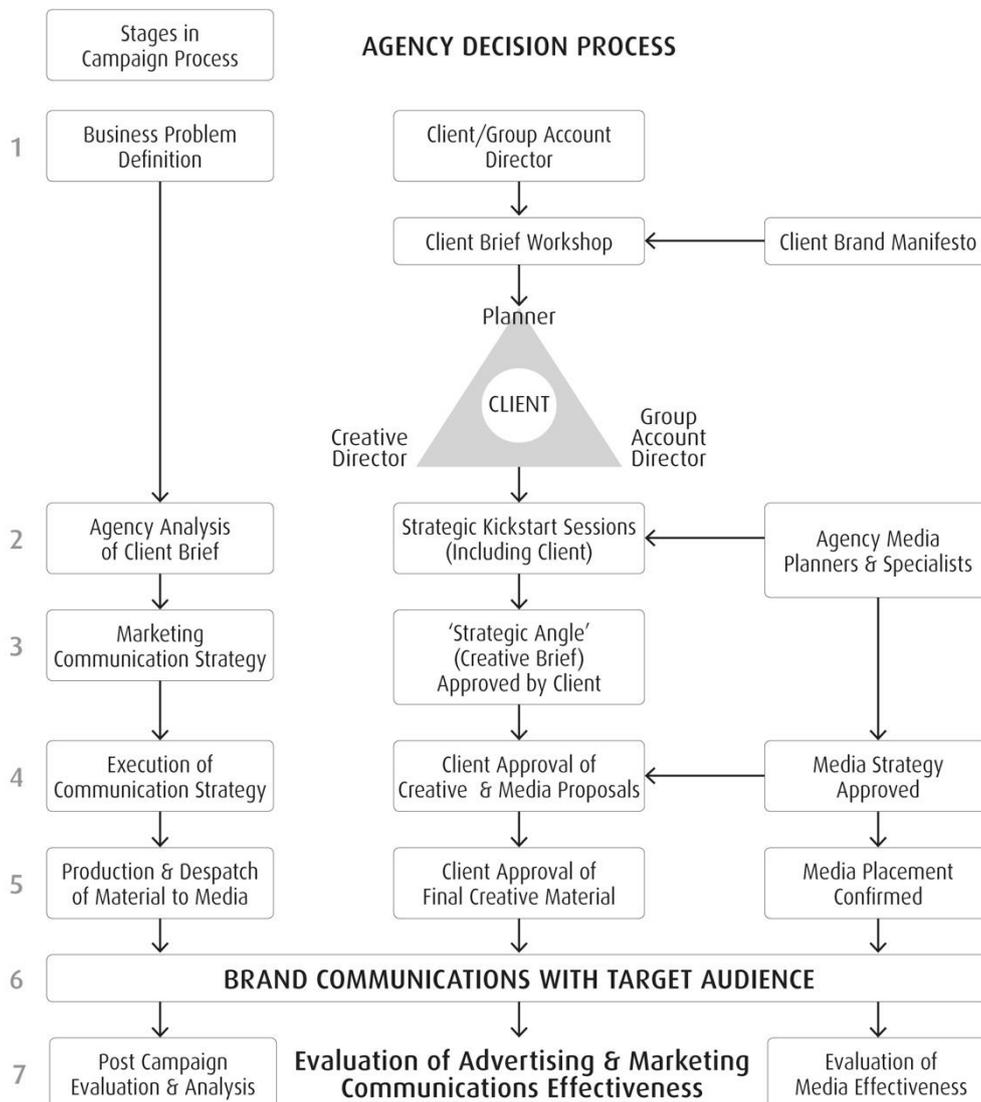
I would rather have a campaign that was effective than likeable - and you don't have to be likeable to be effective. But it is more enjoyable to do likeable ads!" (Head of Account Service) R 5.57

Agency Five's post-campaign effectiveness measures and analyses are consistent with the literature reviewed in Section 2.3.12.

A DSA chart for Agency Five will now be presented.

4.6.9 Summary Statement: Agency Five Decision System Analysis

Figure 4.12: Agency Five: Brand Campaign Creative Process



Source: Developed for this research

Figure 4.12 illustrates the application of DSA to Agency Five. The major decision points in the creative process are identified and presented as a flow chart. There are “distinct, discrete and identifiable stages” as Na et al. (2009, p. 168) observe in their study.

Although the process may appear linear, in fact there are multiple interactions within each stage.

The initial stage involves correctly defining the client’s business problem. For some of Agency Five’s clients this is an irregular event occurring perhaps once a year - albeit

taking up to several months to resolve - but for their larger clients it is an ongoing process with planners constantly involved in developing strategy for multiple campaigns.

In Agency Five the creative process is led throughout by a senior client service executive. Everyone in the account team reports to this person, including the planner and the Creative Director. Normally the account service person will receive the client brief but if it is a major project they will normally invite the planner and the Creative Director to join them for the briefing.

It is becoming increasingly commonplace, however, in Agency Five - even before the client writes a brief - for the agency and the client to meet together for a workshop session to determine what the business problem is; what needs to be solved. This session is called the Client Brief Workshop and includes the client and all of the relevant agency personnel who work on the account. The session is led by the planner. At the end of the workshop the agency should have a client brief to respond to. It will include (at the very least) a budget, a time-frame and reasons why the brief is important.

The client brief may also include a reference to the client's brand framework (or brand checklist) for the agency to refer to. Agency Five favours the brand manifesto brand identity format. This is a statement, written in layman's language, that summarises the core purpose of a brand; why the brand exists and what it does for its customers. The brand manifesto is rooted in an organisation's core corporate vision and values.

The agency next implements what they call a Strategic Kickstart Session. This session also includes the client. The discussion involves a sequence of seven questions that lead logically to the formulation of a strategic communications plan. The Strategic Kickstart Session will usually illuminate a creative approach to the required strategy and produce numerous potential ideas for consideration. In a subsequent meeting a Group Account Director, a planner and the Creative Director will meet with the client and propose a Strategic Angle to be implemented. This becomes the basis for the creative brief.

The creative brief is signed off by the client. It is then presented to all the agency staff who will work on preparing creative and media proposals for the campaign - including public relations and digital staff - in a single internal briefing session.

Next, creative and media proposals are presented to the client for approval. Once approved final creative material is produced and media placements are confirmed. The

final creative work is then signed off by the client before being despatched by the agency to the appropriate media channels.

The campaign appears in the media and the target audience is (hopefully) engaged and responds positively.

Upon completion of the campaign all communication is evaluated against the goals set in the planning stages. Successes and failures are noted, discussed, taken on board and applied to the next round of planning.

The above discussion is consistent with and illustrative of the DSA literature reviewed in Section 3.5.4.1.

4.6.10 Agency Five: Conclusions

This case study, like those preceding it, has sought to address the ten case study topics introduced in Section 3.5.3.

The study confirms the fact that the role of the Account Planner in the agency is strategic and pivotal to the successful implementation of IMC campaigns for clients' brands.

Planners must understand the consumer in-depth and must understand the client's business in-depth. They must find an insight into a need displayed by the target audience's behaviour that can be uniquely met by the client's brand. They must provide a strategy in the creative brief that will inspire their creative colleagues to produce brand-relevant communication ideas that will resolve the client's business problem.

Similarly, the study confirms that the role of the creative brief in the agency's creative process is strategic and pivotal to the successful implementation of IMC campaigns for clients' brands.

The role of brands in the IMC creative process is also fundamental. Agency Five is familiar with three main expressions of the client's brand identity; brand books, brand manifestos and brand guidelines. All three formats are in common use by Agency Five's clients. It is normal in Agency Five for brand identity statements to be incorporated by account planners into brand strategies for IMC campaigns, by way of the creative brief.

Finally, discussions with Agency Five participants provide support for the notion that there are three key drivers of IMC: a brand identity statement, a big idea, and

identification of the target audience consumer's media consumption behaviour (refer to Figure 4.5).

4.7 Chapter Summary and Conclusions

Chapter 4 has presented a 'within-case' analysis of the practices of five leading New Zealand advertising agencies in their formulation of IMC campaigns for their clients' brands. Each case addresses the nine research questions and has been structured around ten topics. Each case is of interest for its uniqueness but also for the commonality it has with the other cases (Stake, 1995). In each case agency practice has been related back to the relevant theory presented in Chapters 2 and 3 of the thesis. In virtually every case agency practice is considered to be consistent with prevailing theory. Only Agency Two's innovative approach to account planning, by virtue of its Agency Two Day model, differs from extant theory.

Chapter 5 will present a 'cross-case' analysis of the five cases in the study. In Chapter 5 interpretations are drawn concerning the meaning or lessons learned from the research (Cresswell, 2007). Cases are collated and analysed and cross-case conclusions are drawn. In Chapter 6 assertions are made concerning the implications of these findings against the backdrop of the literature reviewed in Chapter 2 (Yin, 2009).

Chapter 5: Field Research/Cross-Case Analysis

Figure 5.1: Structure of Chapter Five

Section	Topic
5.1	Introduction
5.2	The role of the Account Planner in the agency
5.3	The role of the creative brief in the creative process
5.4	The role of brands in the creative process
5.4.1	To what extent (and how) do account planners use a brand identity statement when formulating IMC strategy?
5.4.2	What elements are included in any brand identity statement employed?
5.4.3	To what extent is a brand identity statement integrated into the creative brief?
5.4.4	To what extent does the corporate brand identity interact with and infuse the product brand identity in brand identity statements used by New Zealand advertising agencies?
5.5	What are the drivers that integrate marketing communications?
5.6	To what extent is IMC, as practiced by New Zealand advertising agencies, anything more than just 'tactical integration'?
5.7	The measurement and evaluation of marketing communications effectiveness by New Zealand advertising agencies
5.8	A generic agency DSA chart
5.9	A new research-based model of integration and IMC
5.10	Chapter Summary and Conclusions

5.1 Introduction

In Chapter 4, participant responses from each of the five agencies were analysed. These responses were incorporated into five separate case studies, structured on the basis of nine research questions.

In this chapter a ‘cross-case’ analysis is undertaken, in which responses to the research questions in each case are collated and a range of cross-case conclusions are made (Yin, 2009). Multiple cases allow the researcher to collate and compare the findings derived from all of the cases. Replication enhances the possibility of more compelling evidence and of a more robust study than would be obtained from a single-case design. The main argument in favour of the multiple-case study design is that it improves theory building (Bryman & Bell, 2011).

Commencing in Section 5.2 and continuing through Section 5.6 responses to each of the nine research questions - from each case study - are collated and analysed and conclusions drawn. A similar process is applied to the two additional research topics - ‘Measurement and Evaluation of Effectiveness’ and ‘Agency Decision System Analysis Chart’ - in Sections 5.7 and 5.8. (A ‘generic’ agency DSA chart is presented in Section 5.8). In all, a total of 27 cross-case conclusions are derived from the research.

Section 5.9 presents an original research-based IMC process model incorporating a number of the research conclusions. The model is presented with reference to relevant IMC theory discussed in Chapter 2.

Section 5.10 presents a chapter summary and conclusions.

5.2 The Role of the Account Planner in the Agency

The following conclusions summarise the views of the five agencies studied in the research in regard to RQ1: What is the role of the Account Planner in the agency? References in parentheses relate to coded participant responses recorded in Chapter 4. ‘C1’ refers to ‘Conclusion 1’.

C1: The role of the Account Planner is to transform research data, relating to the client’s business problem, into communication strategies and propositions in the form of a creative brief (1.2, 1.4, 2.9, 3.2, 3.3, 4.1, 4.2, 5.1, 5.2, 5.3, 5.13).

A typical comment in this respect is that of Agency One Head of Planning:

“My job is to take data and turn it into strategies or propositions or briefs that will then act as a springboard for delivering creative strategies that will deliver exceptional business results.” (R1.2)

In all five agencies the planner’s task is identical (Baskin 2001; Fortini-Campbell, 2001; Kelley & Jugenheimer, 2011; Morrison & Haley 2003; White, 2008): First, to understand and clearly articulate the client’s business problem. Second, to have an in-depth understanding of the client’s brand and the markets in which the brand competes. Third, to understand the consumers who purchase the client’s brand, their motivations for doing so, and to represent them in the creative process. Fourth, to discover an insight relating to the consumer and the client’s brand that will solve the client’s business problem. Fifth, to write the creative brief that will set the platform for the creative strategy and, finally, to track the IMC campaign’s performance against the communication objectives.

To this end, planners work closely and collaboratively with senior client-side and agency executives to resolve the client’s business problem. Planners firstly examine all available research and frequently use focus groups to gain consumer insights that will unlock the problem. They will then propose a strategy in the form of the creative brief for the creative team to build upon.

Although this research primarily sought patterns of similarity between the five agencies it can be stated that there were very few, and that only minor differences were noted in the five agencies’ understanding and implementation of the account planning process - as discussed above. The only exception to this observation – and the major difference between the five agencies – is the planning process adopted by Agency Two, in which the planning task is not undertaken by a department or a person but took place in the form of a one-day event entitled “Agency Two Day.” As discussed in Section 4.3.3, this event involves decision-making sessions that bring together the key senior client decision-makers and the agency’s full complement of senior executives for a single day of interaction, discussion and planning – in which the client’s business problem is resolved and a creative strategy agreed to. The Managing Partner, who performs the role of Account Planner in Agency Two, then prepares the creative brief in accordance with the strategies agreed to by the participants in the day together.

C2: The role of the Account Planner is to familiarise themselves, in-depth, with the client's business; to understand the client's brand, their customers and stakeholders intimately; and to bring clarity to the issues relating to the client's business problem (1.3, 1.4, 2.9, 3.2, 3.3, 4.1, 4.5, 5.2, 5.3, 5.13).

C3: The role of the Account Planner is to facilitate and monitor the agency's strategic response to the client brief (1.4, 1.6, 2.6, 2.9, 3.2, 3.3, 4.1, 4.2, 5.2, 5.3, 5.13).

C4: The role of the Account Planner is to champion the consumer's cause within the agency; to understand the consumer's world and to be their advocate throughout the strategic process (1.4, 3.2, 3.3, 3.10, 4.1, 5.1, 5.2).

C5: The role of the Account Planner is to be an insight miner and manager: of consumer insights, product insights, brand insights and market insights (1.3, 1.4, 2.9, 3.2, 3.10, 4.1, 5.1, 5.2, 5.13).

5.3 The Role of the Creative Brief in the Creative Process

The following conclusions summarise the views of the five agencies studied in the research in regard to RQ2: What is the role of the creative brief in the creative process?

C6: The creative brief is a contract between the client and the agency in which they both agree on what the business problem is, what the creative insight is and what the budget and timing constraints are (1.11, 1.12, 5.17, 5.20).

C7: The creative brief should clarify, simplify and define the business problem the creative team is tasked with resolving. It is the platform used by the agency to build the creative product (1.11, 1.12, 2.13, 3.17, 3.18, 4.9, 4.10, 4.11, 5.15, 5.17, 5.20).

C8: The creative brief is consumer-focused and links the brand with the consumer. It should identify a cultural, emotional or rational insight about consumers' lives that can be leveraged to create behaviour that will meet the business objective (1.12, 3.17, 3.18, 4.10).

C9: The creative brief should inspire the creative team. It should serve as a springboard for the creative team to create integrated marketing communications that will meet the business objective (1.12, 2.13, 3.17, 4.11, 5.17).

The above conclusions reflect the views of all five agencies in the research. There was no dissension. They also concur with the theoretical assertions presented in Section 2.3.11.3,

that the creative brief is the distillation of the client's business problem (Clemmow, 2010); that the creative brief links an insight about the consumer with an insight about the brand to resolve the client's business problem (Butterfield, 1985; Fortini-Campbell, 2001); that the creative brief is the platform used by the agency to build the creative product (Moriarty et al. 2009; Morrison & Haley, 2003); and that the creative brief must inspire and ignite the creative team – it must spark their idea process (Moriarty et al. 2009).

5.4 The Role of Brands in the Creative Process

The following conclusions summarise the views of the five agencies studied in the research in regard to RQ3: What is the role of brands in the creative process?

C10: Brands are fundamental to the integrated marketing communication process. There is no integrated marketing communications without reference to a brand (*1.19, 1.20, 1.21, 1.24, 1.28, 1.29, 2.14, 2.15, 3.24, 4.12, 4.20, 5.23*).

This conclusion unequivocally supports the assertion made by Schultz (1998):

“The brand is the integrating factor around which all marketing and communication should be built. It is the glue that keeps the organisation, its customers, and its stakeholders together... All forms of marketing and marketing communication must be integrated to build the brand and build value in the brand.” (p. 8).

C11: Understanding a brand's core identity is a prerequisite for effective integrated marketing communications (*1.19, 1.20, 1.21, 1.24, 1.26, 1.27, 1.28, 1.29, 2.14, 2.15, 3.24, 3.27, 3.28, 4.12, 4.16, 4.17, 4.20, 5.23, 5.30, 5.31, 5.34*).

This conclusion is supported by Aaker's (1996) definition of brand identity:

“Brand identity is a unique set of brand associations that the brand strategist aspires to create or maintain. These associations represent what the brand stands for and imply a promise to customers from the organisation members.” (p. 68).

It is also consistent with Madhavaram et al's (2005) definition of brand identity strategy:

“A set of processes that include the coordinated efforts of the brand strategists in (1) developing, evaluating, and maintaining the brand identity/identities, and (2) communicating the brand identity/identities to all individuals and groups (internal and external to the firm) responsible for the firm's marketing communications.” (p. 70).

C12: The consistent representation of a brand's core identity is a prerequisite for effective integrated marketing communications (*1.24, 1.26, 1.28, 1.29, 2.14, 2.15, 3.24, 3.27, 4.12, 4.16, 4.17, 4.20, 5.23, 5.31, 5.34*).

This conclusion supports the contention by Madhavaram et al. (2005) that the consistent communication of a brand's brand identity to brand stewards (all individuals and groups, within or external to an organisation, who have responsibility for communicating the brand to customers, prospects and other stake stakeholders. e.g. advertising and public relations agencies) by brand strategists will ensure a more synergistic and effective IMC.

C13: The articulation of a brand's core identity in the form of a brand book, a brand graphics manual and a brand manifesto is now commonplace in New Zealand amongst marketing organisations (1.20, 1.24, 1.28, 1.29, 3.24, 3.28, 4.12, 5.23, 5.34).

All five agencies make reference to (and sometimes create) brand books (DDB Worldwide, 2003), brand graphics manuals (Kapferer, 2008; Wheeler & Katz, 2011) and brand manifestos (Taylor, 2006) when preparing IMC campaigns for their clients. Again, there are no exceptions. Reference to these expressions of the client's brand is considered by all five agencies to be fundamental to the process of creating and implementing IMC campaigns for their clients' brands.

5.4.1 To What Extent (and how) do Account Planners use a Brand Identity Statement when Formulating IMC Strategy

The following conclusions summarise the views of the five agencies studied in the research in regard to RQ3.1: To what extent (and how) do account planners use a brand identity statement when formulating IMC strategy?

C14: It is common for New Zealand agency account planners to have access to brand identity statements relating to their client marketing organisations' brands when formulating IMC strategy. These brand identity statements are expressed in the form of brand books, brand graphic manuals and brand manifestos (1.30, 2.17, 2.19, 3.29, 3.30, 3.31, 4.21, 4.22, 5.37, 5.38).

This conclusion has been addressed in C13 above.

C15: The form of brand identity statement favoured by New Zealand agencies/account planners, when formulating IMC strategy, is the brand manifesto (1.30, 2.17, 2.19, 3.30, 5.37, 5.39).

Brand manifestos are discussed in Section 2.3.9. As noted there, a brand manifesto declares the core intention of a brand. It captures the purpose and values of the brand; it is the expression of the ambition that the brand owner has for the brand (Taylor, 2006). It is

normally just a single paragraph or a single page statement. Brand manifestos typically serve as the springboard for advertising creatives to come up with a big idea for the brand. They can help to re-state or re-position a brand in the marketplace. A brand manifesto is the distillation of the purpose, function, vision, values and other important attributes of the brand (Teer, 2014). It is a very tight brief for creatives to work from.

5.4.2 What Elements are Included in any Brand Identity Statement Employed?

The following conclusions summarise the views of the five agencies studied in the research in regard to RQ3.2: What elements are included in any brand identity statement employed? This research found that the seven core brand identity elements most frequently mentioned by participants (mentioned by at least four of the five New Zealand advertising agencies) includes:

C16: Brand name, brand graphics/logo, brand personality, brand values, brand purpose, brand story and brand positioning (*1.31, 2.20, 3.32, 4.23, 5.40*).

Table 5.1 summarises the elements referred to by research participants.

Table 5.1: A Summary of Brand Identity Elements Referred to by Research Participants

Brand Characteristic	Agency				
	1	2	3	4	5
Name	✓	✓	✓	✓	✓
Personality	✓	✓	✓	✓	✓
Purpose	✓	✓	✓	✓	✓
Values	✓	✓	✓	✓	✓
Tone, Voice	✓	✓	✓	-	-
Positioning	✓	-	✓	✓	✓
Idea	✓	✓	✓	-	-
Essence	✓	✓	-	✓	-
Story	✓	✓	✓	✓	✓
Graphics	✓	-	✓	-	-
Logo	✓	-	-	-	-
Vision	-	-	-	✓	✓
Attitude	-	✓	-	-	-
Imagery	-	✓	-	-	-
Promise	-	-	✓	-	-
Mission	-	-	-	✓	-
Role	-	-	-	✓	-
Map	-	-	-	✓	-
Fight	-	-	-	✓	-
Benefits	-	-	-	✓	-
Function	-	-	✓	-	-
Authenticity	-	-	-	-	✓
Consistency	-	-	-	-	✓

Source: Developed for this research

Table 5.1 can be summarised as follows:

1. Brand name (must be present - by definition).
2. Brand graphics and logo (must be present - by definition).
3. Brand personality (mentioned by all five agencies). A similar concept is brand tone of voice (mentioned by three agencies).
4. Brand values (mentioned by all five agencies).

5. Brand purpose (mentioned by all five agencies). Similar concepts include brand vision (mentioned by two agencies); brand mission (mentioned by one agency); brand fight (mentioned by one agency) and brand role (mentioned by one agency).
6. Brand story (mentioned by all five agencies).
7. Brand positioning (mentioned by four agencies).
8. Brand essence (mentioned by three agencies). A similar concept is brand idea (mentioned by three agencies).
9. Concepts mentioned just once include: brand attitude, brand imagery, brand promise, brand function, brand map, brand benefits, brand authenticity and brand consistency.

The seven brand identity elements that gained the highest level of consensus amongst participants (mentioned by participants in at least four of the five agencies) included: brand name, brand graphics/logo, brand personality, brand values, brand purpose, brand story and brand positioning.

Figure 2.8 presents Aaker's (1996) brand identity planning model. The twelve core brand identity elements identified by Aaker (1996) include: Brand as Product (product scope; product attributes; quality/value; uses; users; country of origin); Brand as Organization (organization attributes e.g: innovation, consumer concern, trustworthiness; local vs. global); Brand as Person (personality e.g: genuine, energetic, rugged; brand-customer relationships e.g: friend, adviser); Brand as Symbol (visual imagery and metaphors, brand heritage). Aaker also includes 'brand position' in the brand implementation section of his model. Aaker's model is significantly more complex than the seven core elements identified in this research.

Figure 2.9 presents Kapferer's (2008) brand identity prism. Kapferer (2008) postulates that there are six fundamental facets to a brand, represented by a hexagonal prism. There are three facets that represent 'internal' aspects relating to the brand (personality, culture, and self-image) while three additional facets represent 'external' aspects relating to the brand (physique, relationship, and reflection). Kapferer also suggests that a brand must be positioned competitively to demonstrate an advantage over its competitors. Kapferer's model represents a significantly different paradigm from the paradigm represented in this research. However there are common threads that will be discussed below.

Figure 2.10 presents de Chernatony's (2010) brand essence pyramid. The pyramid represents an ascending ladder of linked elements. A brand's most important attributes (e.g. an airline's market-leading inflight entertainment system) are at the base of the pyramid, linked to key functional benefits (e.g. entertainment during the flight) which, in turn, are linked to emotional rewards provided by the benefits (e.g. fun); the emotional rewards provide value (e.g. relaxation for the passenger) that are important to consumers. At the top of the pyramid is the brand personality, reflecting the traits of the brand and embodying the promise of the brand (e.g. ensuring travellers feel alert on arrival).

There are several common threads running through these three models. All agree that a brand begins with a product or a service; all agree that a brand has a personality; all agree that a brand offers a promise, a value-proposition to the consumer. All agree that at the heart of a brand is a culture, a set of beliefs and values. All agree that a brand's positioning is a key concept in its management. In all these respects the models are not dissimilar to - and highly compatible with - the seven brand identity elements identified by this research.

5.4.3 To What Extent is a Brand Identity Statement Integrated into the Creative Brief?

The following conclusions summarise the views of the five agencies studied in the research in regard to RQ 3.3: To what extent is a brand identity statement integrated into the creative brief?

C17: The brand identity statement is the cornerstone of the creative brief (1.33, 1.34, 1.35, 1.36, 1.39, 2.21, 2.22, 3.33, 3.34, 5.41).

This conclusion is consistent with Madhavaram et al's (2005) brand equity strategy schematic which postulates the inherent role of brand identity in developing and implementing a firm's IMC strategy. The proposition is also implicit in the theories of Aaker (1996), de Chernatony (2010), Kapferer (2008) and Luxton (2008) in which brand identity precedes and is antecedent to the integrated marketing communications construct.

C18: The brand identity statement is a statement of how the marketer defines the brand. It is a statement of what the brand is about, and what the marketer would like consumers to think and believe about the brand. As such it is fundamentally important and integral to the creative brief (1.33, 1.34, 1.35, 2.21, 2.22, 3.33, 3.34, 5.41).

This conclusion is also consistent with the extant literature: Aaker (1996,2014), Cooper (2000), de Chernatony (2010), Hackley, (2003), Kapferer (2008), Luxton, 2008), Madhavaram et al. (2005), Moriarty, Mitchell & Wells (2009) and Nandan (2005). Please refer to Table 2.7.

5.4.4 To What Extent does Corporate Brand Identity Interact with and Infuse Product Brand Identity in Brand Identity Statements used by New Zealand Advertising Agencies?

The following conclusions summarise the views of the five agencies studied in the research in regard to RQ3.4: To what extent does corporate brand identity interact with and infuse product brand identity in brand identity statements used by New Zealand advertising agencies?

C19: Corporate brand identities focus on vision, purpose and core-values (Collins & Porras, 1996; Kitchen et al. 2013). These elements are fundamental attributes of brand manifestos. Brand manifestos are commonly used by New Zealand advertising agencies to launch product brands. In this way marketing communications in New Zealand benefit from both strategic, vertical integration and horizontal, tactical integration (2.25, 4.24, 5.42, 5.43, 5.44, 5.45, 5.46).

In Section 2.3.7 Kitchen et al. (2013) define corporate brand identity as:

“The presentation of an organisation to every stakeholder. It is what makes an organisation unique and it incorporates the organisation’s communication, design, behaviour, culture, mission statement and organisation founder. It is thus intrinsically related to image.” (p. 265).

Kitchen et al. (2013) assert that implicit in a corporate brand identity is a statement of the organisation’s mission, (its vision and purpose), and its culture (values and beliefs). In Section 2.3.9 it is stated that a brand manifesto is designed to capture the purpose and values of a brand and to declare the core intention of a brand emotionally and effectively in language that everyone can understand (Teer, 2014). It is also stated in Section 2.3.9 that brand manifestos are commonly used by New Zealand advertising agencies to launch product brands. All five agencies in this research utilise brand manifestos when preparing IMC campaigns for their client’s product brands. This research therefore argues that brand manifestos play a highly strategic role in incorporating the strategic elements of

corporate brand vision and corporate brand values into IMC campaigns designed to launch product brands. In doing this brand manifestos facilitate both the strategic and tactical prerequisites necessary to effectively implement an IMC campaign.

5.5 What are the Drivers that Integrate Marketing Communications?

The following conclusions summarise the views of the five agencies studied in the research in regard to RQ4: What are the drivers that integrate marketing communications?

C20: “The brand is the key to integrated marketing communications. It is the dynamic hub around which all marketing communication revolves” (Schultz & Kitchen, 2000a, p. 55) (1.36, 1.37, 2.28, 2.29, 3.37, 4.25, 4.26, 4.27, 4.28, 4.31, 5.48, 5.49).

C21: Brand identity is the primary driver that integrates marketing communications (1.36, 1.37, 2.28, 2.29, 3.37, 4.25, 4.26, 4.27, 4.28, 4.31, 5.48, 5.49).

C22: A big creative idea is a second driver that integrates marketing communications (1.36, 1.37, 1.38, 2.26, 2.27, 3.37, 3.38, 4.25, 4.26, 4.27, 4.28, 4.31, 5.48, 5.49).

C23: The target audience’s media consumption behaviour is a third driver that integrates marketing communications (1.36, 1.37, 1.40, 2.28, 2.29, 3.37, 3.38, 4.25, 4.28, 4.29, 4.31).

The following comment by Agency Four’s Managing Partner succinctly sums up the interdependence of the three drivers of integration:

“If you talk to the wrong consumer you will have a problem. If you have a big idea that has little connection with the brand you will have a problem. Or if you have a strong brand and you are targeting the right people but your wrong big idea has no cut through there will also be problems.” (Agency Four: Managing Partner) R 4.31

Further support for this concept comes from Duncan and Mulhern (2004): “In IMC the brand is the integrator and communication is the glue and catalyst that can hold the MC functions together to produce a synergistic effect” (p. 14).

This interdependence of the three drivers is illustrated in Figure 4.5. As previously mentioned the model proposes that all three drivers interact with each other and are in turn influenced by each other. In addition, the three drivers work in unison to co-create tactical IMC. The essence of each driver is present, evident and integrated into all planned messages consistently, thus providing a basis for positive conversations with consumers

5.6 To what Extent is IMC as Practised by New Zealand Advertising Agencies Anything more than just ‘Tactical Integration’?

The following conclusions summarise the views of the five agencies studied in the research in regard to RQ5: To what extent is IMC, as practised by New Zealand advertising agencies, anything more than just tactical integration?

C24: The fact that all five agencies employ brand manifestos when preparing IMC campaigns for their clients’ brands, suggests that all five agencies are committed to brand strategies where tactical actions are informed by strategic imperatives. None of the agencies in this study are anchored at Stage I in Schultz and Kitchen’s (2000a) Four Stage IMC Model. This represents a significant development since 2007 when Eagle and Kitchen last studied the theory and application of IMC by advertising agency executives and their clients in New Zealand (1.42, 2.30, 3.41, 4.32, 5.51).

5.7 The Measurement and Evaluation of Marketing Communications Effectiveness by New Zealand Advertising Agencies

The following conclusions are representative of the views of each agency in regard to the measurement and evaluation of marketing communications effectiveness:

C25: Post-campaign analysis is considered standard practice by leading New Zealand advertising agencies. Marketing communications represent a significant financial investment by agency clients and an analysis of their return on that investment is expected (1.43, 1.44, 1.46, 2.32, 2.33, 3.42, 4.33, 5.53, 5.54, 5.55, 5.56, 5.57).

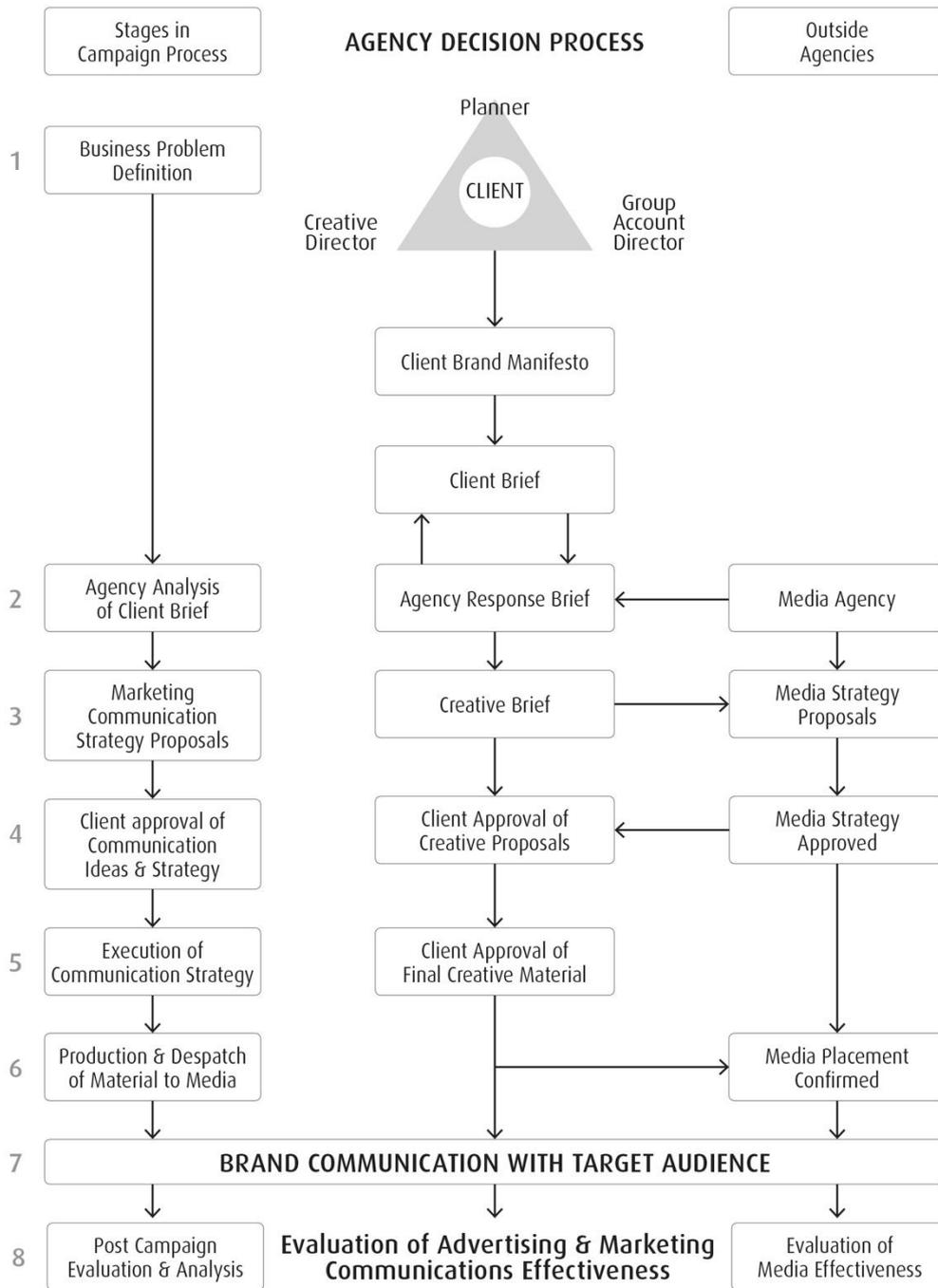
C26: Typical effectiveness measures include: improved results against business and communication objectives; media objectives; sales goals and market-share targets. Changes in target audience brand awareness, perceptions, attitudes and behaviour may be measured. Ultimately, analysts are seeking evidence of an increase in sales as a result of IMC campaign activity (1.44, 1.46, 2.32, 2.33, 2.34, 3.42, 4.33, 5.52, 5.53, 5.54, 5.55, 5.56, 5.57).

5.8 An Agency-Generic DSA Chart.

This research uses DSA to track the agency decision making processes in the creation of IMC campaigns for their clients’ brands. An individual DSA chart for each agency was created and subsequently validated by a principal participant from that agency. In

addition, a sixth, summary, chart was created from the five individual charts, and this too was validated by two independent (non-interviewing) academics and representative participants from three of the five agencies studied. This triangulation is important to ensure reliability of the research. The final generic DSA chart is presented as Figure 5.2:

Figure 5.2: An Agency-Generic DSA Flow Chart of the IMC Campaign Creative Process



Source: Developed for this research

Figure 5.2 is a generic summary of the five DSA flow charts from the five case studies in this research. Each of the five DSA charts track the sequential stages in the campaign creative process as reported by participants from each advertising agency. At each stage myriad decisions are made that are not necessarily linear, as creativity is a messy process. Nonetheless, a decision path is clearly discernible in each chart and Figure 5.2 seeks to illustrate, in a composite manner, a normative process that advertising agencies go through when creating brand campaigns for their clients.

What is clearly evident from an analysis of the five DSA charts is that there is a consistent sequence of stages in the campaign process that each agency follows. Eight stages have been identified in Figure 5.2. They include the following:

- 1) The client's business problem is agreed to and presented – along with a brand identity statement (usually a brand manifesto) – to the agency in the form of the client brief.
- 2) The agency analyses and clarifies the client brief and then presents their analysis back to the client in the form of a response or reverse brief.
- 3) Strategic marketing communication proposals are presented to the client by the agency in the form of the creative brief and the media brief.
- 4) The agency's creative team proffers a big creative idea to integrate the campaign. This big idea and the campaign media strategy are approved by the client.
- 5) The agency executes the communication strategy. Initial creative ideas are presented in 'tissue sessions'. Subsequently, finished creative material and final media proposals are presented by the agency and approved by the client.
- 6) Media bookings are confirmed and creative material is despatched to the media.
- 7) The IMC campaign commences and the brand communication (hopefully) engages the target audience positively.
- 8) Post-campaign evaluation of the campaign's effectiveness is undertaken against the business and communication objectives.

There are subtle differences in the ways in which each of the five agencies approach Stage 1 of the process; how they interact with their clients in order to define the client's business problem. Every agency is committed to getting this right. In the case of Agency Two a defining characteristic of the agency is the implementation of their Agency Day concept. As discussed above, Agency Day involves setting aside a whole day in which the client's senior management (CEO, CFO, COO and CMO) sit down around a common

table with the agency's senior management for a day of creative interaction. Together they exchange ideas and collaborate on the definition and resolution of the client's business problem, invariably producing fresh insights and creative solutions. Both their version of the client brief ('The Agency Recommends') and the creative brief evolve out of this shared day together.

Agency Four also has a convention whereby the agency's senior executives meet with their client counterparts for up to half a day in order to produce the client brief. Agencies One, Three and Five too, have extended meetings between senior agency executives and senior client executives in order to produce the client brief. In Agency Five this may include a Client Brief Workshop. These meetings illustrate the collaborative nature in which agencies and their clients interact together in order to produce a client brief that accurately defines the business problem to be resolved. As part of this process it is appropriate to note that a comprehensive understanding by all parties of the client brand's brand identity (expressed in the form of a brand book or a brand manifesto) is foundational to all subsequent marketing communication strategic planning.

In Stage 2 of the campaign creation process the agency analyses the client brief (media specialists from external media agencies or from the agency's own internal Media Department are normally brought into the discussion at this point) and once this analysis is completed the agency will respond with what is called a reverse brief or a response brief. This response/presentation to the client generally includes the planner, the Group Account Director and a Creative Director.

"The response brief is more often than not a power point presentation which might be just half a dozen slides. Items of interest are distilled from the client's brief. Questions to be answered include: What is the business problem? What is the consumer insight? How do these two elements connect? What is the role of the brand in all of this? The information is extracted from the client brief and simplified - and if needed, further questions are asked." (Agency One: Group Account Director) R 1.10

The response process then proceeds to the creation of the creative brief.

Stage 3 in the process includes the creation and presentation of the creative brief. At this stage the planner seeks to find connections between consumer insights, product insights, market insights and brand insights while media specialists focus on the target audience's media consumption behaviour and how to engage the consumer at appropriate touch points (alternatively, they might investigate what experiential activities the target

audience might respond to). After much discussion and consultation within the agency creative and media strategies and recommendations are presented back to the client. This presentation is led by the Group Account Director with contributions made by the Account Planner, the Creative Director and a senior media specialist. If the client approves the agency recommendations these are then formalised as the creative brief and the media brief.

Stage 4 is where the creative team come up with a big creative idea - or at least a good idea - that will engage the target audience, modify their attitude and behaviour toward the brand in a positive way and help to resolve the client's business problem. The big idea must be consistent with the brand's core identity and is usually informed by a brand manifesto. The idea needs to be vertically (or strategically) integrated with the client's corporate vision and values and horizontally (or tactically) integrated by way of consistent brand messaging across all media. In Stage 4 the big idea and the media strategy are approved by the client.

Stage 5 commences with a 'tissue session' in which initial creative renditions of the big idea are presented to the client by the agency. A range of proposals are discussed with the client and perhaps two will be selected for further development. The proposal considered to be the best of the two will be presented to the client and will normally be approved for production. The agency can then proceed with the production of final creative material and book time and space in selected media. The planner normally steps back at this point. Stage 5 includes the client's approval of the final creative material.

In Stage 6 the creative material is despatched to the respective media channels. Media placement is confirmed.

In Stage 7 the brand campaign goes to air and (hopefully) engages the target audience in a positive manner.

Stage 8 involves post-campaign evaluation and analysis. What went right? What went wrong? Were all the campaign objectives met? What might be done differently next time? Was the client's business problem resolved successfully?

In this research, DSA has been used to clarify the process by which the advertising agencies studied make important strategic decisions in the creation of integrated brand campaigns for their clients. What is not apparent from these charts are the timeframes

involved in this process. What is evident from the interviews with participants for this research however, is that in current practice the timeframes from the inception of a campaign to its conclusion have contracted dramatically compared to timeframes for the creation of campaigns even a decade ago. The main reason for this is because new digital communication technologies have facilitated significant increases in the speed with which group decision processes can be conducted and creative material can be produced. Advertising has always been a deadline business - but now those deadlines for these New Zealand advertising agencies are a lot tighter.

As mentioned above, presentations of Figure 5.2 were made to principal participants of three of the five agencies featured in the case studies. The stages in the campaign process were discussed in detail with each principal and the mapping of the decision points verified for accuracy. Each principal participant expressed satisfaction that the charts accurately reflected a generic mapping of a typical brand campaign creative process.

C27: This study proffers an eight stage model of the advertising creative process:

1. Business problem definition
2. Agency analysis of client brief
3. Marketing communication strategy proposals
4. Client approval of communication ideas and strategy
5. Execution of communication strategy
6. Production and despatch of material to media
7. Brand communication with target audience
8. Post campaign evaluation and analysis

5.8.1 A Relatively Small Body of Published DSA Research

There has been a relatively small body of DSA published work since the 1970s. Most recently to this Na et al. (2009) explored the decision systems within two advertising agencies in New Zealand, based on research completed in the mid-1990s. Marshall et al. (2013, p. 122) suggest two reasons why there has been a dearth of DSA studies in recent years:

One explanation is that research in marketing during the latter end of last century followed a pendulum swing and became highly quantitative. It seems more likely,

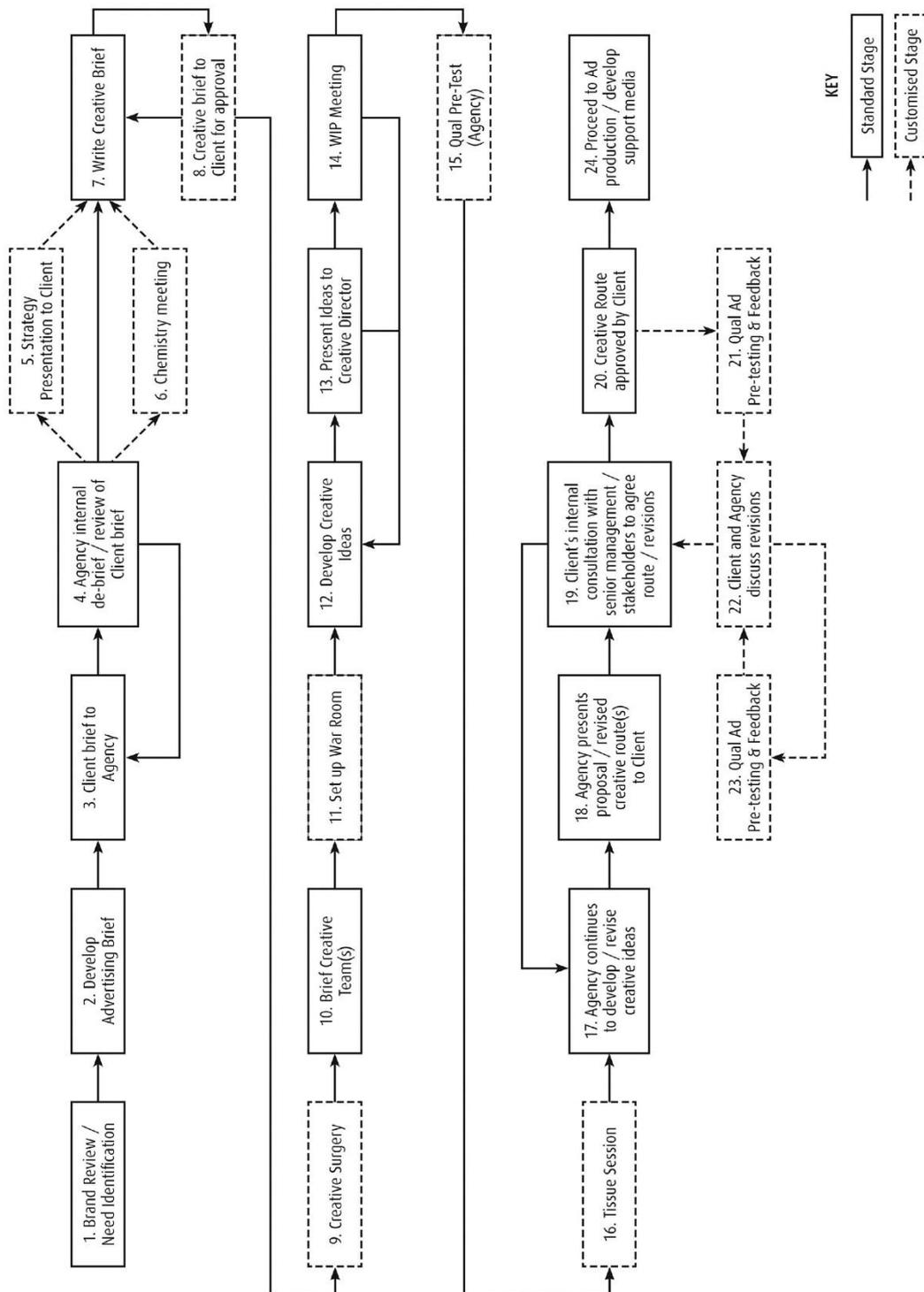
though, that researchers eschew the technique as they simply consider that the method takes too much time and effort.

There is a striking difference between the maps created by Na et al. (2009) and this research. One of the main reasons for the difference is the presence of a new role within today's New Zealand advertising agency; that of the Account Planner. The Account Planner now sits at the heart of the decision making process for the agencies studied - as the agency brand strategist and consumer advocate - and has responsibility for the preparation of the creative brief. Today's process is quite different from agency practices of the mid-1990s in New Zealand. This development on its own represents a significant reason for the different DSA insights gained in this research from Na et al's 2009 paper.

5.8.2 Stages in the Advertising Creative Process

Subsequent to the submission and validation of this research's agency-generic DSA flow chart (Figure 5.2) by representative agency principals in March 2014, Turnbull and Wheeler (2015) published a study of the advertising creative process in advertising agencies in the UK. In their study Turnbull and Wheeler identified 24 distinct stages within the advertising creative process (refer to Figure 5.3).

Figure 5.3: Stages in The Advertising Creative Process



Source: Turnbull & Wheeler, 2015, p. 13.

There are a number of similarities and differences between Turnbull and Wheeler's research and this research:

Turnbull and Wheeler adopted a qualitative methodology and used semi-structured in-depth interviews to explore the advertising creative process in six London (UK) advertising agencies. They interviewed 21 agency account management executives. No account planners, creatives or production executives were interviewed.

This study also adopted a qualitative methodology and used semi-structured in-depth interviews to explore the advertising creative process in five Auckland (New Zealand) advertising agencies. 18 participants (17 agency executives and one client executive) were interviewed (one brand consultancy executive was also interviewed but his comments were not included in the analysis). Agency participants included a mix of senior client service, account planning, creative and production executives.

The size of the agencies in Turnbull and Wheeler's study ranged from 90 employees to 400.

The size of the agencies in this study ranged from 25+ employees to 100+.

In Turnbull and Wheeler's study interviewees describe the advertising creative process as a series of distinct stages. 24 stages were identified by the authors but only 10 stages received recognition by 15 (or more) interviewees (Stages 3, 4, 7, 10, 12, 17, 18, 19, 20 and 21). Later, the 24 stages were further analysed to provide a 7 stage model.

In this study participants also describe the advertising creative process as a series of distinct stages. 8 stages were identified by the researcher.

In Turnbull and Wheeler's study no mention is made of brand identity statements nor of the role of account planners/brand strategists.

In this study brand identity statements and account planners are at the heart of the strategic creative process.

Stages 15, 21 and 23 in Turnbull and Wheeler's study refer to the pretesting of advertisements prior to production. These references are by small numbers of participants in the case of stages 15 (3) and 23 (6). Qualitative (as opposed to quantitative) ad pre-testing is mentioned by 12 interviewees in stage 21.

In this study a comment by Agency One's Group Account Director sums up a view held by many New Zealand agencies: "We are not huge fans of pretesting creative ideas but if

clients want to do it we'll do it. But a strong recommendation is, 'don't let the pretesting kill the idea'". R1.45

It is pertinent to note that in their commentary Turnbull and Wheeler (2015, p. 4) cite Hill and Johnson (2004) who suggest that “pre-testing only occurs under very unusual circumstances and usually only to resolve conflict between stakeholders”.

Turnbull and Wheeler (2015) however, suggest that their research affirms that:

(The) validation of ideas through qualitative and quantitative pretesting are now a routine stage within the advertising creative process... In particular, the findings suggest that pretesting is more prevalent among FMCG and global/pan European campaigns than other categories (pp. 14-15).

This conclusion suggests that larger multinational companies servicing multiple cultural and ethnic markets are more likely to insist on pretesting creative material. By contrast, it can be assumed that New Zealand, a small market with relatively small marketing communication budgets, does not require the same level of pre-testing of creative material.

Turnbull and Wheeler (2015) analyse their 24 stages further to provide a seven-step model of the advertising creative process (refer to Table 5.2):

1. Task identification (Stages 1-2)
2. Agreement of task objectives (Stages 3-10)
3. Ideation (Stages 11-12)
4. Response (Stage 13)
5. Validation - Internal review (Stages 14-15)
6. Validation - External review; client and consumer (Stages 16-19 and 21-23)
7. Decision (Stages 20 and 24).

Figure 5.2 of this study, by comparison, proffers an eight stage model:

1. Business problem definition
2. Agency analysis of client brief
3. Marketing communication strategy proposals
4. Client approval of communication ideas and strategy
5. Execution of communication strategy
6. Production and despatch of material to media

7. Brand communication with target audience
8. Post campaign evaluation and analysis

The stages in the two studies are compared in Table 5.2. The last two stages in Figure 5.2 are not addressed by Turnbull and Wheeler.

Table 5.2: A Comparative Table of The Stages in The Advertising Creative Process

Turnbull & Wheeler (Seven - step model)	Turnbull & Wheeler (24 Stages)	Current Research: Figure 5.3 (8 Stages)
1. Task identification (Stages 1-2)	1. Brand review/need identification 2. Develop advertising brief	1. Business problem definition (Stages 1-3)
2. Agreement of task objectives (Stages 3-10)	3. Client brief to agency 4. Agency internal de-brief/ review of client brief 5. Strategy presentation to client 6. Chemistry meeting 7. Write creative brief 8. Creative brief to client for approval 9. Creative surgery 10. Brief creative team(s)	2. Agency analysis of Client Brief (Stages 4-6)
		3. Marketing communication strategy proposals (Stages 7-8)
		4. Client approval of communication ideas and strategy (Stages 9-15)
	3. Ideation (Stages 11-12)	
4. Response (Stage 13)	13. Present ideas to Creative Director	
5. Validation - Internal review (Stages 14-15)	14. WIP meeting 15. Qual pre-testing (Agency)	
6. Validation - External review; client and consumer (Stages 16-19 and 21-23)	16. Tissue session 17. Agency continues to develop/revise creative ideas 18. Agency presents proposed/ revised creative route(s) to client 19. Client's internal consultation with senior management/stakeholders to agree route/revisions	5. Execution of communication Strategy (Stages 16-23)
	7. Decision (Stages 20 and 24)	
6. Validation – External review; client and consumer (Stages 21-23)	21. Qual ad pre-testing and feedback 22. Client and agency discuss revisions 23. Quant ad pre-testing and feedback	
7. Decision (Stages 20 and 24)	24. Proceed to ad-production/ develop support media	6. Production & despatch of material to media (Stage24)
		7. Brand communication with target audience
		8. Post campaign evaluation and analysis

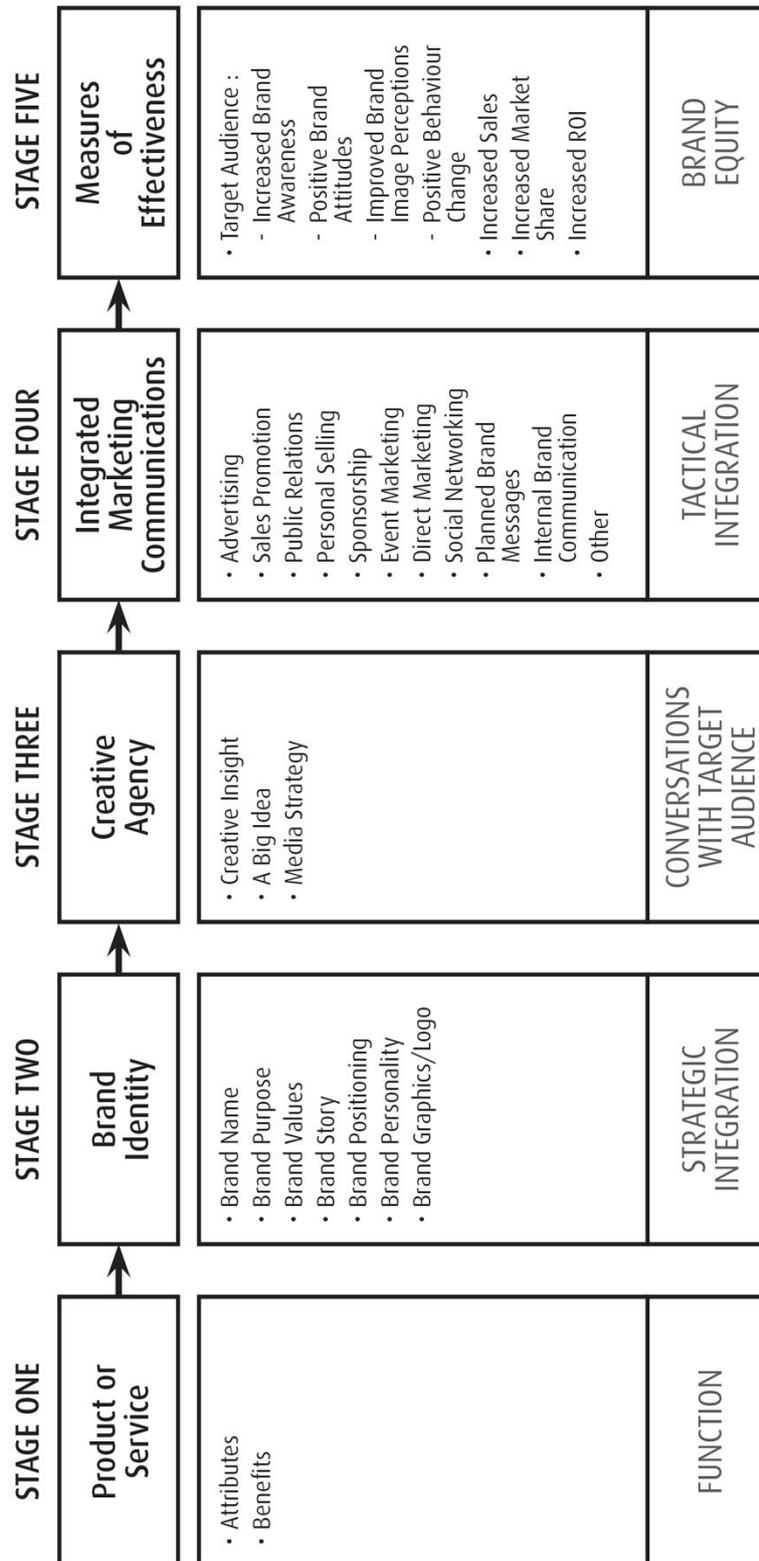
Source: Developed for this research

A new IMC process model will now be introduced, based on the conclusions listed above.

5.9 A New Research-Based Model Illustrating the Implementation Process of IMC

Figure 5.4 is a model that, like Figure 5.2, seeks to illustrate the IMC implementation process - as suggested by research participants. It is derived from the above research conclusions. Although it takes a different perspective from Figure 5.2 it does not contradict that model and is in fact complementary to it. It also encompasses Figure 4.5. Figure 5.4 is a five stage process model.

Figure 5.4: Stages in the IMC Implementation Process



Source: Developed for this research

5.9.1 Stage One: Product or Service

The first stage in Figure 5.4 is entitled 'Product or Service'. Marketing involves products and services. Kotler and Keller (2006) assert that the core concept of marketing is exchange. Exchange is "the process of obtaining a desired product from someone by offering something in return...Exchange is a value-creating process because it normally leaves both parties better off" (Kotler & Keller, 2006, pp. 6-7). A marketer puts forward a value proposition in the form of a product or a service - a value proposition that includes a set of 'attributes' and 'benefits' designed to address a target market's needs; an offering that the marketer anticipates the target market will accept. Kotler and Keller (2006) suggest that marketers are involved in marketing at least 10 types of entities: goods, services, experiences, events, persons, places, properties, organisations, information, and ideas. In Figure 5.4 these entities are summarised under the heading, 'Product or Service'.

Stage 1 of Figure 5.4 concludes with a reference to 'Function'. All products and services perform a function; they do something - and if they don't perform that function very well they will eventually be eliminated from the marketplace (King & Bullmore, 1974).

However in today's world of parity products people don't buy products or services for functional reasons alone, they often buy them for non-functional reasons (or 'function-plus' reasons). These reasons relate to the aesthetics, style and perceived personality of the product or service - defined today as a 'brand' - and their perception of how, if purchased, that brand will uniquely symbolise or represent them as a person (King, 1971; King & Bullmore, 1974). These non-functional branded attributes - such as personality and style - represent the intangible components of a product or service. They are created by the marketer (refer to Stage Two below). These intangible attributes endow a product or service with its own unique brand personality, an extremely important property in today's marketplace where people relate to brand personalities in much the same way that they relate to human personalities (Aaker, 1997). People build relationships with brands just as they build relationships with other people: they are loyal to brands; they trust brands; they are disappointed when brands fail to meet their needs, and their attitude to a brand can change as a result of a good or bad experience with that brand. The 'brand as person' metaphor is extremely useful in marketing communications (Aaker, 2014). Kapferer (2008, p. 211) summed up the product/brand dichotomy succinctly when he wrote: "Manufacturers make products; consumers buy brands."

The second stage in Figure 5.4, identified as ‘Brand Identity,’ is now discussed.

5.9.2 Stage Two: Brand Identity

In Figure 5.4 the second stage in the IMC implementation process is entitled ‘Brand Identity’. The brand identity concept has been discussed at length in this thesis and lies at the heart of the research. It is the marketer’s vision, blueprint or plan for their brand (de Chernatony, 2010, p. 266). The brand identity statement contains the core elements of the brand that need to be embedded in all marketing communications relating to the brand (Ellwood, 2000; Kapferer, 2008). In Figure 5.4 the seven core elements that jointly represent a brand’s brand identity are drawn from the research’s analysis and conclusions presented in Section 5.4.2: ‘brand name, brand graphics/logo, brand personality, brand values, brand purpose, brand story and brand positioning’. In Figure 5.4 they are listed in likely order of their strategic importance. First, and of fundamental importance is a brand’s name.

Aaker (1991, p. 187) asserts that a brand’s name is “the basic core indicator of the brand, the basis for both awareness and communication efforts”. In like manner Kapferer (2008, p. 211) comments; “in an economic system where demand and prescription focus on brands, brand names naturally take on a pre-eminent role”. Brand name awareness is considered one of four major brand equity assets by Aaker in his Brand Equity model (Aaker, 1991, 1996, 2014). For consumers a brand’s name can be one of the most important, meaningful and pivotal attributes of a branded product or service (Riezebos, 2003). A brand name identifies the brand owner as the exclusive commercial source of products or services relating to that brand (de Chernatony & McDonald, 2003). Finally, marketing communications give a brand name meaning as brand associations are linked to the name (Aaker, 1991; Percy, 2008).

After ‘brand name’ this thesis concludes from the cases studied, that ‘brand purpose’, ‘brand values’ and ‘brand story’ are fundamental core elements that reveal an organisation’s corporate brand identity and corporate culture (Collins & Porras, 1996; Kitchen et al. 2013).

The corporate brand, in addition to being the core of the branding process from which product brands often generate their value, also provides the necessary integration elements that bring and hold the organisation together. This includes everyone from employees to suppliers and vendors to, ultimately, shareholders and owners (Schultz, 2001, pp. 6-7).

Establishing and affirming an organisation's vision, mission and goals is a primary task of senior corporate executives. This is summed up in Figure 5.4 as 'brand purpose'.

Brand purpose... provides a focal point, a big idea, around which to rally marketing thinking and the organisation's resources to create better consumer engagement, and ultimately drive sustainable growth... Purpose answers the question: what's the point? Why do we do this? It's about defining the values that drive what you do... People buy into brands that reflect their values and priorities - that say something positive about them... Purpose is a sense of shared ambitions and beliefs that explains why we do what we do, what we stand for in the world - and so shapes how and what we do (Tinlin, 2014, pp. 1, 3).

Similarly, affirming and modelling core 'corporate values' is a fundamental task of senior corporate leaders. Their success in achieving this will determine the corporate culture that pervades their organisation. In addition, core values provide a basis for continuity in the process of managing, developing and protecting an organisation's brands as strategic organisational assets. The core values of an organisation represent the guiding principles and the unifying common thread of an organisation (Kitchen et al. 2013). They are central to both the corporate brand and all product brands (Schultz, 2001). They are at the heart of an organisation's integrated marketing communications.

'Brand story', similarly, informs and integrates a corporation and its marketing communications. "Every brand has a unique asset that cannot be copied - its own past" (DDB Worldwide Communications Group, 2003).

Whether you are dealing with product brands or company brands, storytelling is essential to successful branding, since your brand is the sum of all your corporate behaviours and communications that inform your customers' experiences with your product or company. In particular, persona-focused storytelling is essential to branding... The brand persona drives the continuity for the overall brand message. It offers a point of reference that audiences relate to, regardless of the specific story or message (Herskovitz & Crystal, 2010).

Rich (2014, p. 48) contends that as businesses compete in an increasingly contested space "the power of compelling brand stories to connect with customers has never been more important." Van den Bergh, De Ruyck and Van Kemseke (2009) argue that today's postmodern consumers place a high value on authenticity. Van den Bergh et al. (2009) suggest that consumers are looking for less materialistic buying motivations - and a product or brand deemed more authentic reduces their feeling of guilt. They also suggest that traditionally, brands defined by their origin, history and heritage (their brand story) have been considered more authentic. For example, Levi Strauss & Co - where their

brand heritage and history has been a considerable part of their brand DNA in the past and also today. The origin (the invention, starting point or beginning of a company or brand), the history (what has happened since the origin of a brand until now) and the heritage of a brand (a collective memory of things that happened with a brand) provide cues for consumers who want to lower purchase risks (Van den Bergh et al. 2009). However, today's young post-modern marketing-savvy consumers have a broader view of authenticity:

Authenticity refers not only to a realness based on origins, brand history or heritage but also to staying true to a unique brand DNA, and not trying to be something different to be in vogue. In this definition not pretending and honesty are core attributes (Van den Bergh et al. 2009, p. 3).

Authenticity and authentic brand stories are core components of an effective brand in that they support the formation of a unique brand identity (Aaker, 1996).

'Brand positioning' is the fifth core element in a brand's brand identity statement, as revealed in the research (Figure 5.4). Brand positioning is a key concept in both Aaker's (1996) Brand Identity Planning Model (Figure 2.8) and Kapferer's (2008) Brand Identity Prism (Figure 2.9). Kapferer (2008) asserts that positioning a brand means "emphasising the distinctive characteristics that make it different from its competitors and appealing to the public" (p. 175). He suggests that positioning is a critical concept in brand management because "it reminds us that all consumer choices are made on the basis of comparison. Thus, a product will only be considered if it is clearly part of a selection process" (pp. 175-176). Kapferer (2008) argues that brand positioning is competition-oriented; brands should be positioned in such a way as to best attack competitor's market share.

The aim of positioning is to identify, and take possession of, a strong purchasing rationale that gives us a real or perceived advantage. It implies a desire to take up a long-term position and defend it (Kapferer (2008) p. 178).

Brand positioning is at the heart of marketing strategy (Keller, 2008). Positioning focuses on where the product resides (or could reside) within the mind of the consumer, relative to the competition (Reis & Trout, 1986). It is a central marketing concept and fundamental to brand strategy.

'Brand personality' is the next core element in a brand's brand identity statement, as identified in the research (Figure 5.4). Brand personality is defined by Aaker (1996, p.

141) as “the set of human characteristics associated with a given brand.” In his Brand Identity Planning Model (Figure 2.8) it is part of the ‘Brand as Person’ perspective. Likewise, the nomenclature ‘Personality Traits’ is at the top of de Chernatony’s (2010) Brand Essence Pyramid (Figure 2.10).

The notion that consumers relate to brands in the same way that they relate to people was postulated as early as 1971 by Stephen King (King, 1971). However it was not until 1997, with the publication of Jennifer Aaker’s paper, ‘Dimensions of Brand Personality’, that a theoretical framework conceptualising the brand personality concept in terms of five fundamental dimensions (sincerity, excitement, competence, sophistication and ruggedness) was defined separately and distinctively from the related concept of brand image (Aaker, 1997).

Brand personality is one of the six facets of brand identity proffered by Kapferer (2008) in his Brand Identity Prism (Figure 2.9). He writes:

A brand has a personality. By communicating, it gradually builds up character. The way in which it speaks of its products or services shows what kind of person it would be if it were human. ‘Brand personality’ has been the main focus of brand advertising since 1970. Numerous American agencies have made it a prerequisite for any type of communication (Kapferer, 2008, pp. 183-184).

The seventh and final core element in a brand’s brand identity statement, as identified in the research (Figure 5.4), is ‘Brand graphics/logo’. This element is equivalent to Aaker’s (1996) ‘Brand as Symbol’ perspective (Figure 2.8). Keller (2008, p. 155) observes that “although the brand name typically is the central element of the brand, visual elements typically also play a critical role in building brand equity and especially brand awareness.” Logos and symbols can be easily recognised and are an effective way for consumers to identify products and brands. Packaging can also help to identify the brand and convey information that builds or reinforces valuable brand associations (Keller, 2008). Most companies of any size have a logo and a tagline that differentiates them from their competitors. Many companies have a collection of design prescriptions, relating to the visual expression of their brand, in a manual called ‘brand guidelines’. This is a graphic design manual for the brand, describing how the brand should look in any given environment (Wheeler & Katz, 2011). Kapferer (2008) argues that, ideally, it is important for an organisation to define its brand identity before it formulates a graphic charter defining its visual identity. “Knowing brand identity paradoxically gives extra freedom of

expression, since it emphasises the pre-eminence of substance over strictly formal features” (Kapferer, 2008, p. 173).

In summarising Stage 2 of the model, it should be noted that Figure 5.4 contends that the seven brand identity elements discussed above include the ‘strategic integration’ elements of a brand. As previously noted, Kliatchko (2008) suggests that the implementation of IMC involves just two levels of an organisation; the corporate level and the operational level. At the corporate level, senior management define what business the organisation is in and commit to safeguarding the identity, image and reputation of the organisation. This thesis asserts that this strategic role at the corporate level relates to upholding and safeguarding what has been identified in Figure 5.4 as an organisation’s brand purpose, brand values and brand story. It follows that these elements should strategically anchor all actions undertaken by an organisation’s management, designated by Kliatchko (2008) to be at the operational level.

The third stage in Figure 5.4, identified as ‘Creative Agency’, will now be discussed.

5.9.3 Stage Three: Creative Agency

The creative advertising agency plays a major role in the creation of integrated marketing communications. It always has. Today the agency-client relationship is a symbiotic partnership in which the two parties are mutually dependent upon each other (Eagle, Dahl, Czarnecka & Lloyd, 2015). Indeed Gould, Grein and Lerman (1999) argue that agency-client integration at an organisational level is fundamental to the successful implementation of IMC. Ideally, there should be consistency, consensus and unity in this process.

Within the creative agency account planners (or brand strategists) play a critical role in the IMC process (refer to Section 2.3.11.2). The planner’s primary function is to produce the creative brief (Baskin, 2001; Fortini-Campbell, 2001) - the platform upon which creative agencies create integrated marketing communication campaigns. However Fortini-Campbell (2001) suggests that the Account Planner is primarily an insight manager, who first accumulates and analyses consumer and market information, distils the insights, and then communicates those insights to the rest of the agency team; usually in the form of the creative brief. The planner’s role is to find insights into problems that lead to their solution. Ultimately they must be able to link an insight about the consumer

with an insight about the brand that will resolve the consumer's problem (Kelley & Jugenheimer, 2011).

The 'Creative Agency' stage in Figure 5.4 is portrayed as having three elements, representing key strategic roles that agencies have in the IMC process. The first element is a 'creative insight'. Upon receipt of the client brief, and mindful of the client brand's brand identity (refer to Stage 2 of Figure 5.4) the agency is charged with identifying a 'creative insight' - a consumer, product, brand or market insight - that will solve the client's business problem. This insight is then incorporated into a communication strategy and presented as a creative brief to the creative team. This first stage in the creative process is normally led by the Account Planner, in association with senior agency client service and creative executives. The creative brief is normally approved by the client before the creative team is briefed.

Once the creative brief has been presented to the creative team that team is responsible for coming up with a 'big idea' that will creatively link the brand with the consumer and create a consumer response that will meet the communication objective and resolve the business problem. The big idea is the second element in Stage 3 of Figure 5.4's five stage IMC implementation process. The big idea must be consistent with the brand's brand identity and be media neutral. It must be capable of expression through all media. Once the big idea has been approved by the client it is developed into various expressions of the final creative product. The final creative product is also approved by the client prior to despatch to the media.

The third element in Stage 3 of Figure 5.4 is the 'media strategy' for an IMC campaign. This strategy is derived from the agency's identification of the target audience's media consumption behaviour and the media touch points where the brand communication is likely to best engage the target audience. The media strategy is integrated by this understanding of the target audience and of their media consumption behaviour, and is designed to engage the target audience through the media touchpoints .

There should be no surprise that Stage 3 of Figure 5.4 is a variation of Figure 4.5.

Finally, it should be noted that Stage 3 includes the descriptor 'Conversations with Target Audience'. This statement is included to acknowledge the fundamental fact that the IMC process is interactive and customer-centric. Creative insights are gained through

conversations with the target audience; big ideas in today's marketplace must include a place for conversations with the target audience; and any media strategy today would be remiss without a social media component allowing for conversations between the brand and the target audience.

Today a brand's value is often 'co-created' by companies and their consumers bonded through brand building experiences. Muscroft and Needham (2011) define co-creation as "the commercial practice of developing insights, brands, products and other forms of intellectual property or activity via collaboration with external consumers" (p. 1).

Furthermore, Nysveen and Pedersen (2014) contend that the world is "moving from a company-centric value creation to a more customer-centric value creation where customers interact with the company and co-create value... Value co-creation stands out as the critical mechanism for competitive advantage" (p. 1). In this respect the comments of Charles Chappell, a senior executive at Procter & Gamble, are apposite:

"Brand managers or advertising agencies don't control brands. Instead it's thousands and thousands of people who have conversations about our brands who have the most major impact. It is our job to figure out how we're going to tap into this." (Precourt, 2011, p.1)

Largely because of the advent of the Internet, markets have now become more like forums (Prahalad & Ramaswamy, 2002), and in this environment companies need to embrace a new approach to value creation; they need to learn to co-create value with their customers.

5.9.4 Stage Four: Integrated Marketing Communications

The fourth stage represents the multitude of media channel options available for marketing communications today. These options include not only traditional media channels such as broadcast and print media, direct mail, telemarketing, outdoor sites and ambient media - but also new media channels, including smart phones, all forms of internet-based media (including social media), gaming and myriad new digital formats and platforms that are emerging every day. Add to these options the challenges of communicating effectively with staff, shareholders, suppliers, distributors and other stakeholders ; of creating engaging viral messages, newsworthy events and online conversations that will build a brand - and it is not hard to conclude that creating effective integrated brand communications today is not for the fainthearted.

Stage 4 includes the descriptor ‘Tactical Integration’. This statement is included to acknowledge the fact that IMC is implemented at the operational level of an organisation (Kliatchko, 2008) and involves (by definition) ‘message integration’ (Kerr, 2003). The organisational challenge is to integrate all messages relating to a brand; to generate consistent brand messages in all media - paid and earned, planned and unplanned - that will build the brand. In IMC parlance this involves both ‘strategic integration’ and ‘tactical integration’. However, the focus of Stage 4 is on tactical integration. This thesis has argued that tactical integration should be informed by strategic integration and that strategic integration is typically embedded in a brand identity statement - and in New Zealand advertising agencies a brand identity statement normally takes the form of a brand manifesto. Therefore, by reference to a brand manifesto agencies can ensure that the tactical integration of their client’s brand communications is strategically informed.

5.9.5 Stage Five: Measures of Effectiveness

The fifth stage in Figure 5.4 addresses the issue of accountability, where the discussion briefly covers the ‘measures of effectiveness’ utilised by marketers to gauge the effectiveness of their IMC campaigns.

While acknowledging that the measurement of integration and synergy has proved difficult to date (refer to Section 2.3.12) New Zealand advertising agencies and their clients still consider post-campaign analysis to be standard practice (refer to Section 5.7). The fifth stage in Figure 5.4 lists measures of IMC campaign effectiveness currently utilised by agencies and clients in New Zealand. These measures include:

Increased brand awareness amongst the target audience. Rossiter and Percy (1987, p. 132) define brand awareness as “the buyer’s ability to identify (recognise or recall) the brand within the category in sufficient detail to make a purchase.” Brand awareness is the most fundamental measure of marketing communications effectiveness (Aaker, 2014; Keller, 2008).

Enhanced brand attitude amongst the target audience. A second fundamental measure of marketing communications effectiveness. Brand attitude is defined by Rossiter and Percy (1987, p. 132) as “the buyer’s overall evaluation of the brand with respect to its perceived ability to meet a currently relevant motivation.” Improvements in target audience

attitudes toward the brand is an important communication objective for all marketing communications (Keller, 2003).

Improvements in target audience perceptions of a brand's image. A third measure of campaign effectiveness. This is closely related to changes in brand attitude (Keller, 2008). Picton and Broderick (2005, p. 662) define brand image as “the subjective views of consumers; an interpretation of the objective marketing stimuli transmitted by marketers.” Picton and Broderick (2005) suggest that the marketer’s ultimate goal is to create congruence between a brand’s image and its brand identity.

Positive behaviour change. This is another fundamental goal of IMC campaigns. Multiple forms of behaviour change can be identified. Rossiter and Percy (1987) suggest that ‘brand purchase intention’ is a basic communication effect desired by brand managers as a result of IMC campaigns. They define brand purchase intention as “the buyer’s self-instruction to purchase the brand or to take purchase-related action’ (p. 132). Brand purchase intention is closely related to the next measure of effectiveness; increased sales.

Increased sales. As a measure of marketing communication effectiveness increased sales relates particularly to marketing communication disciplines such as direct response advertising (where there is a clear ‘call to action’ in the offer) and sales promotion (Kerr, 2003). The effectiveness of advertising in terms of sales is more difficult to ascertain (Seddon, 2010).

Changes to brand market share. These changes are relatively easy to determine and are monitored regularly by marketing executives.

ROI and long-term effectiveness of IMC campaigns. ROI is ultimately tied to increases in sales as a result of the preceding campaign activity. However the increasing interest in brand valuation as a strategic management tool (refer to Section 2.2.1) can be seen as a response to the challenges inherent in measuring ROI.

Finally, building ‘brand equity’ is a key strategic objective of IMC and as such is featured as the concluding descriptor in Figure 5.4 (Aaker, 2014; Fill, 2009; Kapferer, 2008; Keller, 2008; Madhavaram et al. 2005; Schultz, 1998). Brand equity is “the set of assets and liabilities linked to the brand” (Aaker, 2014, p. 150). These assets and liabilities represent value to both organisations and shareholders.

Figure 5.4 suggests that the focus of IMC should be on the objective of building brand equity (Madhavaram et al. 2005).

5.10 Chapter Summary and Conclusions

In Chapter 5 a 'cross-case' analysis of the practices of five leading New Zealand advertising agencies in their implementation of IMC campaigns for their clients' brands is presented. Representative responses from each agency across seven research topics (topics 3-9) are collated and compared. Conclusions from the research analysis are presented and three IMC process models are proffered (Figure 4.5, Figure 5.2 and Figure 5.4).

This thesis contends, on the basis of the empirical evidence drawn from the five case studies, that a brand identity statement in some form is a fundamental prerequisite to the creation of effective IMC. This proposition concurs with proposals postulated by Madhavaram et al. (2005).

Chapter 6 concludes the thesis. It reviews the contributions to knowledge made by the research; it identifies the limitations of the study and presents suggestions for future research.

Chapter 6: Conclusion

Figure 6.1: Structure of Chapter Six

Section	Topic
6.1	Introduction
6.2	Conclusions About the Research Questions
6.3	Conclusions About the Research Problem
6.4	Implications for IMC Theory
6.5	Implications for IMC Practice
6.6	Methodological Implications
6.7	Limitations and Directions for Further Research
6.8	The Research Objectives Revisited
6.9	Final Conclusion

6.1 Introduction

This thesis has examined the role of the brand identity construct in the implementation of IMC by New Zealand advertising agencies on behalf of their clients' brands. The research has focused specifically on the strategic role played by agency account planners in this process. It has investigated whether or not account planners use some form of brand identity statement when preparing the agency creative brief. Further, it has examined the strategic and tactical roles of brand identity statements in the IMC implementation process.

In Chapter 1 the research problem was presented:

What is the role of the brand identity construct in the implementation of IMC by New Zealand advertising agencies?

In response to this problem nine research questions were specified in order to conduct a thorough analysis of the IMC implementation processes of five leading New Zealand advertising agencies. These questions included five central questions and four sub-questions:

RQ1: What is the role of the Account Planner in the agency?

RQ2: What is the role of the creative brief in the creative process?

RQ3: What is the role of brands in the creative process?

RQ3.1: To what extent (and how) do account planners use a brand identity statement when formulating IMC strategy?

RQ3.2: What elements (for example: brand name, brand positioning, brand personality, brand values, brand graphics/logo) are included in any brand identity statement employed?

RQ3.3: To what extent is a brand identity statement integrated into the creative brief?

RQ3.4 To what extent does corporate brand identity interact with and infuse product brand identity in brand identity statements used by New Zealand advertising agencies?

RQ4: What are the drivers that integrate marketing communications?

RQ5: To what extent is IMC, as practised by New Zealand advertising agencies, anything more than just 'tactical integration'?

Chapters 4 and 5 addressed these questions.

The thesis has followed a structured approach. Chapter 1 introduced the research problem and gave an outline of the thesis. The purpose of the study was explained. Chapter 2 provided an extensive review of the literature. The brand equity construct was introduced briefly and the IMC construct was defined, along with the concepts of corporate brand, product brand and brand identity. The relationship of brand identity to IMC and the strategic role of account planners in the IMC implementation process was discussed. IMC research relating to New Zealand advertising agencies was reviewed, providing a benchmark for this research. Measures used to evaluate IMC effectiveness were identified. Chapter 3 described the theoretical assumptions underpinning the research and the reasons for choosing a multiple-case study research design. Data collection and data analysis methods were presented. Chapter 4 recorded the field research - based primarily on in-depth interviews with 18 senior executives from five leading New Zealand creative

advertising agencies and one client organisation. Chapter 4 presented a within-case analysis of each of the five agencies while Chapter 5 presented a cross-case analysis of the five agencies. This final chapter presents the conclusions of the thesis. The chapter presents the academic, managerial and methodological implications of the research, acknowledges the limitations of the study and makes recommendations for future research.

6.2 Conclusions about the Research Questions

Empirical findings and insights gained from this research were presented in Chapter 5. These conclusions are now discussed in relation to the research questions and extant literature.

6.2.1 RQ1: What is the role of the Account Planner in the Agency?

The research concludes that the role of the Account Planner in the agency is:

C1: To transform research data relating to the client's business problem into communication strategies and propositions in the form of a creative brief.

C2: To familiarise themselves, in-depth, with the client's business; to understand the client's brand, their customers and stakeholders intimately; and to bring clarity to the issues relating to the client's business problem.

C3: To facilitate and monitor the agency's strategic response to the client brief.

C4: To champion the consumer's cause within the agency; to understand the consumer's world and to be their advocate throughout the strategic process.

C5: To be an insight miner and manager: of consumer insights, product insights, brand insights and market insights.

These findings are consistent with the literature. The conclusions concur with the role of the Account Planner discussed in Section 2.3.11.2 of the literature review and summarised in Table 2.2 (Baskin, 2001; Fortini-Campbell, 2001; Griffiths, 2008; Kelley & Jugenheimer, 2011; Morrison & Hayley 2003; White, 2008). In contemporary New Zealand creative advertising agencies the Account Planner is more likely to be called a Brand Strategist. This title reflects the role of the planner in the IMC process - to creatively link a brand insight with a consumer insight in the formulation of a brand

communication strategy that will help to resolve a client's business problem. *These findings represent an advance on the existing literature.*

6.2.2 RQ2: What is the role of the Creative Brief in the Creative Process?

The research concludes that the role of the creative brief in the creative process is:

C6: To act as a contract between the client and the agency in which they both agree on what the business problem is, what the creative insight is and what the budget and timing constraints are.

C7: To clarify, simplify and define the business problem the creative team is tasked with resolving. It is the platform used by the agency to build the creative product.

C8: To be consumer-focused and link the brand with the consumer. It should identify a cultural, emotional or rational insight in consumers' lives that can be leveraged to create behaviour that will meet the business objective.

C9: To inspire the creative team. It should serve as a springboard for the creative team to create integrated marketing communications that will meet the business objective.

These findings are consistent with the literature and agree with the assessment of the role of the creative brief presented in Section 2.3.11.3 (Baskin, 2001; Belch et al. 2009; Butterfield, 1985; Clemmow, 2010; Cooper, 2000; Fortini-Campbell, 2001; Moriarty et al. 2009; Morrison & Haley, 2003; Reeve, 1992; Wolfe, 1994). *This represents a contribution to the literature.*

6.2.3 RQ3: What is the role of Brands in the Creative Process?

The research concludes that understanding the role of brands in the creative process includes understanding that:

C10: Brands are fundamental to the integrated marketing communication process. There is no integrated marketing communication without reference to a brand.

C11: An in-depth knowledge of a brand's core identity is a prerequisite for effective integrated marketing communications.

C12: The consistent representation of a brand's core identity is a prerequisite for effective integrated marketing communications.

C13: The articulation of a brand's core identity in the form of a brand book, a brand graphics manual and a brand manifesto is now commonplace in New Zealand amongst marketing organisations.

These findings are consistent with the literature. The brand manifesto concept is new to the IMC literature. These conclusions support the theories of Aaker (1996, 2014); Abratt and Kleyn (2012); Balmer (2012); de Chernatony (1999, 2010); Ghodeswar (2008); Kapferer (2008); Keller (2008); Kitchen et al. (2013); Madhavaram et al. (2005); Nandan (2005); Olins (2007); Schultz (1998, 2001) and Schultz and Kitchen (2000a) discussed in Sections 2.3.6 to 2.3.10 - in which a brand identity statement is considered to be a fundamental prerequisite for an effective IMC strategy. A brand identity statement is the brand blueprint for all integrated brand communications (de Chernatony, 2010). *These findings represent a significant advance on the extant literature.*

6.2.4 RQ3.1: To what Extent (and how) do Account Planners use a Brand Identity Statement when Formulating IMC Strategy?

The research concludes that:

C14: It is common for New Zealand agency account planners to have access to brand identity statements relating to their client marketing organisations' brands when formulating IMC strategy. These brand identity statements are expressed primarily in the form of brand books, brand graphic manuals and brand manifestos.

C15: The form of brand identity statement favoured by New Zealand agencies/account planners, when formulating IMC strategy, is the brand manifesto.

These findings are consistent with the literature. The brand manifesto concept is new to the IMC literature. Brand identity statements and brand manifestos are discussed in Sections 2.3.8 and 2.3.9 of this thesis. It is suggested there that brand identity statements are currently presented in four different formats: brand books, brand graphic manuals, brand manifestos and 'brand on a page' statements. Brand manifestos are the format overwhelmingly favoured by account planners in New Zealand agencies. Many large national and multinational organisations have brand books. Brand graphic manuals are utilised by all organisations who have a serious commitment to consistent corporate design and livery; 'Brand on a page' statements are mainly used by client marketing departments in New Zealand. Examples of brand manifestos are presented in Section

2.3.9. There is currently no published academic literature relating to brand manifestos. There is also a dearth of industry- based publications relating to the concept (Miletsky & Smith, 2009; Taylor, 2006, Teer, 2014). These findings represent a significant advance on the extant literature.

6.2.5 RQ3.2: What Elements are Included in any Brand Identity Statement Employed?

The research found that the brand identity elements most frequently mentioned by participants (in at least four of the five agencies) included:

C16: Brand name, brand graphics/logo, brand personality, brand values, brand purpose, brand story and brand positioning.

These findings are consistent with the literature. Brand name, brand graphics and brand logo are intrinsic elements in a brand's visual identity (Aaker, 1996; Kapferer, 2008; Wheeler, 2009; Wheeler & Katz, 2011). Brand purpose, brand values and brand story are important elements in an organisation's corporate brand identity or core ideology, providing strategic direction to a brand (Colins & Porras, 1996; de Chernatony, 2010; Kapferer, 2008; Kitchen et al. 2013; Olins, 2007; Urde, 2009), while brand personality and brand positioning relate directly to product brands but can also be important elements in corporate brands. Brand personality and brand positioning frequently provide tactical direction to a product brand. As mentioned above (Section 2.3.7) corporate brands project the core values of a corporation and are inextricably mixed with product brands, often exerting a strong influence on the brand image of a product. *These findings represent an advance on the extant literature.*

6.2.6 RQ3.3: To What Extent is a Brand Identity Statement Integrated into the Creative Brief?

The research concludes that the extent to which a brand identity statement is integrated into the creative brief by New Zealand advertising agencies is as follows:

C17: The brand identity statement is the cornerstone of the creative brief.

C18: The brand identity statement is a statement of how the marketer defines the brand. It is a statement of what the brand is about, and what the marketer would like consumers to

think and believe about the brand. As such it is fundamentally important and integral to the creative brief.

These findings are consistent with the literature. In Section 2.3.6 two IMC planning models are presented; Schultz and Schultz's (2004) 'Five-step IMC planning approach' (Figure 2.6) and Duncan's (2005) six-step planning approach (Figure 2.7). It is noted that Schultz and Schultz (2004) make an *implied* reference to the importance of the brand identity concept in Step 3 of their model, while Duncan (2005) specifically refers to the graphic dimensions of a corporate identity program in his model, while arguing strongly in his text for strategic consistency in all of an organisation's communications with all of its stakeholders. By this he means that core brand elements such as an organisation's corporate mission, its core values and its corporate culture should be integrated into all communications if strategic consistency is to be effective. Again, this is an *implied* reference to the importance of the brand identity concept in an organisation's IMC strategies and tactics.

By way of summary, this research supports the aforementioned proposals in both planning models, but whereas in the planning models the brand identity concept is largely *implied* - this research found that brand identity statements are specified as part of the IMC implementation process. *This also represents an advance on the extant literature.*

6.2.7 RQ3.4: To what Extent does Corporate Brand Identity Interact with and Infuse Product Brand Identity in Brand Identity Statements used by New Zealand Advertising Agencies?

The research concludes that:

C19: Corporate brand identities focus on vision, purpose and core-values (Collins & Porras, 1996; Kitchen et al. 2013). These elements are fundamental attributes of brand manifestos. Brand manifestos are commonly used by New Zealand advertising agencies to launch product brands. In this way marketing communications in New Zealand benefit from both strategic, vertical integration and horizontal, tactical integration.

These findings are consistent with the literature. However the brand manifesto concept is new to the IMC literature. In Section 2.3.7 the similarities and differences between corporate brands and product brands are discussed. As noted above, corporate brand identities focus on vision, purpose and core values (Collins & Porras, 1996; Duncan,

2005; Kitchen et al. 2013). In Section 2.3.9 it is noted that brand manifestos declare the core intention of a brand and capture the purpose and values of a brand. In brand manifestos there is a fusion of an organisation's mission statement with the brand promise (Miletsky & Smith, 2009). There is a bias for action in a manifesto (Taylor, 2006). The strategic elements of a corporate brand are intentionally incorporated into brand manifestos. In this way tactical brand communications are kept strategically consistent. *This is an important contribution to the body of knowledge.*

6.2.8 RQ4: What Are the Drivers that Integrate Marketing Communications?

The research concludes that:

C20: "The brand is the key to integrated marketing communications. It is the dynamic hub around which all marketing communication revolves" (Schultz & Kitchen, 2000a, p. 55).

C21: Brand identity is the primary driver that integrates marketing communications.

C22: A big creative idea is a second driver that integrates marketing communications.

C23: The target audience's media consumption behaviour is a third driver that integrates marketing communications.

These findings are consistent with the literature. The notion that the brand is the key to integrated marketing communications; that it is the dynamic hub around which all marketing communication revolves, has been argued in Section 6.2.3. More specifically, the notion that brand identity is the primary driver that integrates marketing communications has been presented in Sections 6.2.4, 6.2.5, 6.2.6 and 6.2.7. The proposition that a big creative idea is a second driver that integrates marketing communications is alluded to in Section 2.3.11.3 and Table 2.3 (Baskin, 2001), and discussed in Section 4.2.6 and Section 4.3.6. Ogilvy (1983, p. 16) contends that "Unless your advertising is based on a big idea, it will pass like a ship the night". The creation of big ideas is a primary function of creative advertising agencies (Duncan, 2005; Moriarty et al. 2009; BBR Saatchi & Saatchi, 2012). Finally, the idea that the target audience's media consumption behaviour is a third driver that integrates marketing communications is discussed in Section 2.3.4 (Assael, 2011), Section 2.3.11.3 and Table 2.3 (Moriarty et al. 2009), Section 2.3.6 (Schultz & Schultz, 2004), Section 2.3.12 (Schultz, 2010) and Section 4.2.6.

Integrating media planning around the target audience's media consumption behaviour is not a new idea (Rossiter & Percy, 1987), nor is the notion that a big idea is an integrating force in IMC (BBR Saatchi & Saatchi 2012). Even the concept of brand identity as an integrating 'brand blueprint' is not new (Aaker, 1996; de Chernatony, 2010; Duncan & Mulhern, 2004; Kapferer, 1986, Schultz & Kitchen, 2000). However, what is new is the insight that all three of these drivers of IMC act together in unison and interdependently to create IMC at a tactical level and that the model presented as Figure 4.5 is the first model to express this insight in this way (Duncan's 2002 IMC Process Model, cited by Kitchen et al. (2004), comes closest).

Each driver is necessary for marketing communications to be fully integrated. As mentioned in Section 4.2.6 integrated marketing communications typically fail when reference to a brand's identity is weak or non-existent. This research contends that cross-functional organisational integration on its own will not necessarily lead to integrated marketing communications; that organisational integration on its own is not enough to ensure the implementation of effective IMC. Integrated brand communications, by definition, should be based on the centrality of a corporate brand. Similarly, integrated marketing communications is likely to fail when the big idea is disconnected from the core brand elements of brand identity - or if it is the wrong idea. A lack of consistency or fit between the brand persona, brand values, brand positioning and the big idea will result in confusion rather than synergy. In addition, it has long been understood that marketing communications is likely to fail when the media strategy fails to accurately understand the target audience's media consumption behaviour. Sending the right message to the wrong people is a waste of time and money. As previously mentioned the model proposes that all three drivers interact with each other and are in turn influenced by each other. In addition, the three drivers work in unison to create IMC. The essence of each driver is present, evident and integrated into all planned messages consistently, thus providing a basis for positive conversations with consumers. *The process model presented as Figure 4.5 is a significant contribution to the literature.*

6.2.9 RQ5: To what Extent is IMC as Practised by New Zealand Advertising Agencies Anything more than just 'Tactical Integration'?

The research concludes that:

C24: The fact that all five agencies employ brand manifestos when preparing IMC campaigns for their clients' brands, suggests that all five agencies are committed to brand strategies where tactical actions are informed by strategic imperatives. None of the agencies in this study are anchored at Stage I in Schultz and Kitchen's (2000a) Four Stage IMC model. This represents a significant development since 2007 when Eagle and Kitchen last studied the understanding and implementation of IMC by advertising agency executives and their clients in New Zealand.

These findings build on the extant literature. The Account Planner's role is relatively new to New Zealand advertising agencies (it was introduced by Saatchi and Saatchi in 1995) but it is not mentioned by Eagle and Kitchen (2004) or Eagle et al. (2007) in their research. However the brand manifesto concept is new to the published IMC literature. In Section 2.3.11.1 previous research involving advertising agencies and IMC in New Zealand is discussed at length (Eagle et al. 1999; Eagle & Kitchen, 2000b; Eagle & Kitchen, 2004; Eagle et al. 2007; Kitchen & Schultz, 1999). In the most recent research Eagle et al. (2007) conclude that New Zealand agencies appeared to be content with a tactical understanding of IMC with little appreciation of the strategic imperatives relating to IMC. Eagle et al. (2007) contend that there was no evidence to suggest that there had been any evolution in agency thinking regarding IMC since Eagle and Kitchen's 2004 research. In that research Eagle and Kitchen (2004) concluded:

“In spite of the professed commitment to an outside-in orientation, there is no evidence that organisations are actively seeking to listen to their customers or even to adjust market offerings - or communications - in the light of what they hear. Nor is there evidence of any serious endeavour to utilise information technology such as segmented databases to identify, target and measure the response of specific market segments... In New Zealand, as elsewhere, ad agencies display a remarkable proclivity to be anchored at Stage 1 - in the Schultz & Kitchen, 2000 'Stages in IMC Development' model.” (Eagle & Kitchen, 2004, p. 5).

This research suggests that encouraging progress has been made; that New Zealand agencies today are mindful of the need to inform tactical IMC strategies with corporate strategic imperatives, and that brand manifestos are the favoured means by which they facilitate this process. *This represents a further contribution to the literature.*

6.2.10 The Measurement and Evaluation of Marketing Communications Effectiveness by New Zealand Advertising Agencies

The research concludes that:

C25: Post-campaign analysis is considered standard practice by leading New Zealand advertising agencies. Marketing communications represent a significant financial investment by agency clients and an analysis of their return on that investment is expected.

C26: Typical effectiveness measures include improved results against business and communication objectives; media objectives; sales goals and market share targets. Changes in target audience brand awareness, perceptions, attitudes and behaviour may be measured and online behaviour is measured. Ultimately, analysts are seeking evidence of an increase in sales as a result of IMC campaign activity.

These findings are consistent with the literature. IMC measurement and evaluation of effectiveness is discussed in Section 2.3.12 and Section 5.9.5 while Appendix 2.4 presents Agency One's Post Campaign Analysis Template. The difficulties in measuring integration and synergy are acknowledged (Assael, 2011; Moriarty & Schultz, 2012; Schultz, 2010), as are the difficulties in measuring and evaluating the effectiveness of IMC campaigns (Duncan, 2005; Eagle & Kitchen, 2004, Eagle et al. 2007). Various measures of IMC effectiveness are discussed in Section 5.9.5 relating to Figure 5.4: increased brand awareness, positive brand attitudes, improved brand image, enhanced brand purchase intentions, increases in sales, increases in market share and positive ROI. Ultimately, building brand equity is the key strategic objective of IMC (Aaker, 2014; Duncan, 2005; Kapferer, 2008; Luxton, 2008; Madhavaram et al. 2005). Brand valuation is not common in the New Zealand marketplace. The research suggests that increased sales and market share are still considered two of the most important measures of IMC effectiveness by clients of New Zealand advertising agencies. *This is a contribution to the literature.*

6.2.11 An Agency-Generic DSA Chart.

C27: The research proffers an eight stage generic DSA model of the advertising/IMC creative process. The eight stages include:

1. Business problem definition
2. Agency analysis of client brief
3. Marketing communication strategy proposals
4. Client approval of communication ideas and strategy

5. Execution of communication strategy
6. Production and despatch of material to media
7. Brand communication with target audience
8. Post campaign evaluation and analysis

These findings are quite consistent with prior research - most recently the Na et al. (2009) study and the Marshall et al. (2014) paper although the brand manifesto concept is new to the IMC literature. The DSA process is discussed at length in Section 3.5.4.2 and individual agency DSA models are presented and discussed in Sections 4.2.9; 4.3.9; 4.4.9; 4.5.9 and 4.6.9. The generic model is presented as Figure 5.2 and discussed in Section 5.8. It reflects aspects of Moriarty et al's 2009 'Steps in Preparing the Creative brief' (Table 2.3), Schultz and Schultz's 2004 'Five-Step IMC Planning Process' (Figure 2.6), Duncan's 2005 'Zero-Based Campaign Planning' (Figure 2.7) and Turnbull & Wheeler's 2015 'Stages in the Advertising Creative Process' (Figure 5.3). Where Figure 5.2 differs significantly from the other process models is its explicit inclusion of the brand manifesto as an important element in the IMC creative process.

The process model presented as Figure 5.2 is a significant contribution to the advertising literature.

6.2.12 A new Research-Based model Illustrating the Implementation Process of IMC

This model is also consistent with the literature, but does offer new insights. In Section 5.9, Figure 5.4 is a model that, like Figure 5.2, seeks to illustrate the IMC implementation process - as suggested by research participants. As discussed above, it is derived from the research conclusions. Although it takes a different perspective from Figure 5.2 it does not contradict that model and is in fact complementary to it. It also encompasses Figure 4.5. Figure 5.4 is a five stage process model. It is discussed in detail in Section 5.9.

6.3 Conclusions about the Research Problem

The research problem was presented in the introduction to this chapter:

What is the role of the brand identity construct in the implementation of IMC by New Zealand advertising agencies?

Responses to the nine research questions support the contention that the brand identity construct plays a strategic role in the implementation of IMC by New Zealand advertising agencies.

The role of brands is well established in the literature (Aaker, 1996, 2014; de Chernatony, 2010; Kapferer, 2008; Keller, 2008; Kitchen et al. 2013; Schultz, 1998, 2001; Schultz & Kitchen, 2000a). The role of the brand identity construct in the IMC process is less well established (Ghodeswar, 2008; Luxton, 2008; Madhavaram et al. 2005; Nandan, 2005; Reid et al. 2005).

It should be no surprise to learn that this thesis has its roots firmly imbedded in Madhavaram et al's 2005 theoretical propositions, discussed in Section 2.3.9 and illustrated by Figure 2.11. Madhavaram et al. (2005) propose that the consistent communication of a brand's identity by brand strategists to brand stewards - all individuals and groups within or external to an organisation who have responsibility for communicating the brand to customers, prospects, and other stakeholders - will ensure a more synergistic and effective IMC, which in turn will lead to stronger customer-based brand equity (Keller, 1993).

The findings of this research support the contentions of Madhavaram et al. (2005) to the extent that New Zealand advertising agencies use brand identity statements to inform the creative process of implementing IMC campaigns for their client's brands. All five agencies in the research use brand manifestos as the favoured form of brand identity statement when creating IMC campaigns for their clients. However, no measures of synergy or effectiveness or improvements in customer-based brand equity (CBBE) were undertaken in this research, so to state that the use of brand identity statements resulted in improved synergy, effectiveness and CBBE is beyond the scope of this research.

The research found that two new developments have improved the ability of New Zealand advertising agencies to deliver IMC that is both strategic and tactical. The first development is the observation that all agencies in the study employ account planners in the formulation of IMC campaigns for their clients. Account planners in New Zealand advertising agencies prefer to be called brand strategists - because this title reflects the essence of their role within the agency. The strategic orientation of planners involves a natural interest in the nature and role of a client's brand and the relationship that the brand has with its stakeholders. The strategic imperatives of the brand are important to the planner. Further, the role of the planner is to understand the relationship that the brand has with its existing and prospective customers and how that relationship might be enhanced. The role is essentially consumer-focused. The twin focus of the planner - on

the brand and on the customer - is crucial when it comes to the implementation of strategic consistency in the IMC process. The encapsulation of strategic as well as tactical imperatives relating to the client's brand communications are contained in the planner's most important contribution to the IMC process - the creative brief.

A second development found by the research that has improved the ability of New Zealand advertising agencies to deliver IMC campaigns that are both strategic and tactical, is the utilisation of brand manifestos in the IMC implementation process. Brand identity statements in the form of brand books and brand graphic manuals have been employed in the advertising process by New Zealand advertising agencies for some years. However the volume of content in many brand books has not endeared them to agency creatives - who prefer 'the freedom of a tight brief'. Brand manifestos on the other hand are succinct, to the point, and highly motivational. They appeal to agency creatives due to their brevity and single-mindedness. Consequently, the use of brand manifestos in New Zealand creative advertising agencies when implementing IMC campaigns for their clients appears widespread. Brand manifestos are a relatively recent addition to the marketing communication toolkits of New Zealand advertising agencies and their clients.

The implications of these research findings for IMC theory will now be discussed.

6.4 Implications for IMC Theory

The research makes a number of contributions to IMC theory. The major contribution is to refocus attention on the strategic role that brands in general, and brand identity statements in particular, can play in the implementation of IMC campaigns (Madhavaram et al. 2005). Brand identity statements have the potential to instil strategic consistency into the tactical implementation of IMC campaigns – strategic integration being an issue that has aroused considerable discussion amongst IMC academics in recent years (Kerr & Patti, 2013). Although this idea is not new (Schultz, 1998; Schultz & Kitchen, 2000a) it has been neglected in recent times as the focus of interest has tended to fall on a raft of alternative issues including, for example, defining the IMC construct (Kliatchko, 2009), the need for organisational cross-functional integration (Duncan & Moriarty, 1997; Schultz & Schultz, 2004), and, strategic integration (Kerr & Patti, 2013). *Refocusing attention on the strategic role of brand identity statements in the implementation of IMC campaigns is the major contribution of this research to the body of knowledge.*

6.4.1 Brand Identity Statements Positively Influence the Implementation of IMC Programs

The findings of this thesis support the contention that brand identity statements in the form of brand manifestos can play a highly strategic role in the implementation of IMC campaigns. As noted above, brand manifestos uniquely encapsulate the strategic elements of a brand and therefore strategically inform the tactical strategies employed by creative advertising agencies when implementing IMC campaigns for their clients' brands. In this way brand identity statements positively influence the implementation of IMC programs. *This is a significant contribution to the literature.*

6.4.2 Account Planners Positively Influence the Implementation of IMC Programs

This research found that account planners play a highly strategic role in the implementation of IMC campaigns by creative agencies. Account planners, or brand strategists, are the authors of the most important document in the creative agency, the creative brief (Butterfield, 1985). In preparing this document, planners infuse the brief with strategic imperatives and insights relating to the client's brand and link them to creative insights pertaining to the target audiences' needs, wants, beliefs, attitudes and behaviour. The Account Planner is an advocate, on the one hand, for the consumer - all the way through the creative process - and on the other hand, for the strategic integration of the client's brand into all planned marketing messages. The planner defines the communication task, prepares the creative brief, monitors the creative process, represents the consumer's view in all presentations to the client, and tracks the campaign's performance through their follow-up research (Fortini-Campbell, 2001). In this way account planners positively influence the implementation of IMC programmes. *This is a significant contribution to the literature.*

The implications of the research findings for IMC practice will now be discussed.

6.5 Implications for IMC Practice

The research suggests a number of implications for IMC practice relating to brand identity statements. First, the research suggests that the utilisation of brand identity statements can positively influence the implementation of IMC. Next, the research suggests that the utilisation of brand manifestos can uniquely facilitate the infusion of strategic brand elements into tactical IMC communications. In addition, the research

suggests that brand manifestos are succinct, single-minded, highly motivational brand identity statements that may appeal to agency creatives for their brevity and utility.

The research further suggests that the utilisation of account planners (or brand strategists) by advertising agencies can positively influence an agency's ability to implement IMC campaigns. Account planners play a highly strategic role in the implementation of IMC campaigns by creative agencies and can thereby add value to an agency's IMC capabilities.

Finally, the research proffers three new process models that have the potential to contribute to enhanced IMC practice. Figure 4.5 is a new process model that illustrates how three fundamental drivers of IMC (brand identity, a big idea and target audience media consumption behaviour), interdependently facilitate tactical expressions of IMC. The model offers instructive and analytical value for practitioners in that it identifies the core IMC campaign elements upon which to focus in order for them to effectively integrate their marketing communications. Next, Figure 5.2, another new process model, illustrates the positioning of the brand manifesto statement in the IMC implementation process, and as such also has instructive and analytical value for practitioners. The model identifies the key decision points in the IMC implementation process. Figure 5.4 is a third new process model. It also illustrates the implementation process of IMC and offers additional instructive and analytical value for practitioners. It clearly identifies five important stages in the IMC implementation process; particularly the location of the brand identity construct in that process.

6.6 Methodological Implications

This research employs an in-depth qualitative approach and a case-study methodology seldom attempted in research on IMC. The study utilises face-to-face in-depth interviews, document analysis and multiple-case studies. The main strength of the case study is the depth, richness and completeness of detail that is able to be gathered (Creswell, 2007, Woodside, 2010). Case studies are exploratory and can foster new hypotheses and new research questions (Flyvberg, 2011); they allow the researcher the freedom to search for whatever data is deemed to be important (Zikmund, 1997). This study's utilisation of a multiple-case study design has allowed it to reach cross-case conclusions that offer more compelling evidence and a more robust study than would otherwise be obtained from a single-case design (Yin, 2009).

Most IMC studies have adopted a positivistic-quantitative perspective; very few studies have utilised a qualitative approach (Burgmann, 2007). An important characteristic of this research is that the researcher was able to access and interview a cross-section of 17 senior agency executives (account service, planners, and creatives) and one senior client executive (18 participants in total). Accessing 17 senior agency executives and achieving a balance of senior client service, account planning, and creative executives from five leading New Zealand advertising agencies is a unique achievement (Hackley, 2003; Turnbull & Wheeler, 2015). Examining the advertising creative process within an advertising agency setting is also a rare achievement (Turnbull & Wheeler, 2015). The insights gained and the conclusions drawn, the models developed and the theory advanced have all been positive outcomes arising from the adoption of the qualitative research methods employed in this study.

6.7 Limitations and Directions for Further Research

There are a number of limitations to this research.

The first limitation is that the research, by its very nature - as a piece of qualitative research - cannot be generalised to another time and place.

The second limitation involves the location of the research. Out of practical necessity the research was undertaken in New Zealand, utilising leading New Zealand advertising agencies. The case has been made (Section 3.5.1.2) that the agencies chosen in the research all produce world-class, award-winning advertising and marketing communications. However, as much as it would have been desirable and preferable to have had a representative sample of agencies from several countries in the research this was unrealistic due to time and cost factors.

Another limitation relating to this research is the size of the New Zealand market (in terms of population, unit sales volumes, and sales turnover value) and the size of the marketing communication budgets utilised in IMC campaigns in New Zealand – in comparison to markets in other countries with larger populations. Similarly, the size of the agencies studied (in billings and numbers of employees) are small relative to agencies in the USA, the UK, Europe, and other countries with larger populations. The extent to which the conclusions reached in this study can be applied to other countries will only be known if the research is replicated in those countries.

Another possible limitation relating to the research is the question of whether the implementation of IMC is dependent on company size. Burgmann (2007, p. 421) comments:

“An implication of the empirical phase (of the research) was that IMC implementation is dependent on company size. The larger a company is in terms of employee size and geographical reach, the harder it is to implement IMC at a global level and vice versa.”

The larger the company, the greater the possible number of management levels and the greater the possibility for organisational departments to become organisational silos (Aaker, 2008; 2009), and the greater the need for organisational cross-functional coordination across all departments (Kerr & Patti, 2013; Porcu et al. 2012). These are significant issues that have been raised within the body of IMC literature and cannot be dismissed.

The question of size also applies to advertising agencies' ability to successfully implement IMC campaigns. Schultz and Schultz (2004) suggest that in the 1990s most large advertising agencies “failed to overcome the functional chasm that scuttled their attempts to integrate marketing communications for their clients” (p.13). They observe however, that many of the early IMC success stories came from smaller regional advertising agencies who were able to practise the underlying principles of integration effectively. According to Schultz and Schultz a distinguishing characteristic was each agency's lack of functional departments for each discipline. Instead, “for each project, discipline specialists meet initially to ensure that their objectives are well integrated into the plan before they begin the creative process” (p.13). When advertising agencies become so large that organisational departments (such as account service, account planning and creative departments) become organisational silos the need for cross-functional coordination across departments similarly becomes a necessity and a high priority. In the above discussion of the advertising creative process (in Section 5.9.2) Turnbull and Wheeler (2015) report that the size of some of the agencies in their UK research sample had as many as 400 employees. This is significantly larger than the 100+ employees in the three largest agencies studied in this research and much greater than the two smallest agencies studied in this research. This could explain the need for formal ‘chemistry meetings’ (Stage 6 in Turnbull and Wheeler's 24-stage process) between some of the UK agencies and their clients and the proclivity to pre-test agency creative

proposals. Again, it can be argued that the extent to which the conclusions arrived at in this research can be applied to other countries with larger marketing organisations and larger advertising agencies will only be known if the research is replicated in these countries. This is a direction for further research.

Additional directions for further research include:

Testing the two theoretical propositions presented in Section 6.4 in a *quantitative* study:

6.4.1 Brand identity statements positively influence the implementation of IMC programs.

6.4.2 Account planners positively influence the implementation of IMC programs.

Testing the first proposition relates back to designing a piece of quantitative research to test Madhavaram et al's 2005 theoretical propositions (discussed in Section 2.3.9 and illustrated by Figure 2.11). Included in the proposed research would be measures of synergy, effectiveness, and customer-based brand equity (CBBE). Testing proposition 6.4.2 would also require measures of IMC synergy and effectiveness.

Finally, there is very little research available today relating to brand manifestos. This research suggests that the brand manifesto plays a highly strategic role in the IMC implementation process for the agencies studied. There is a compelling need for a much greater understanding of this strategic role and for further understanding of the configuration of this important document.

6.8 The Research Objectives Revisited

In Chapter 1 (Section 1.2) four research objectives were presented. It is timely to now evaluate whether or not those objectives were met.

6.8.1 To Better Understand the Process of Implementing IMC

This objective has been achieved. The theoretical, practical and methodological contributions made by the research to an enhanced understanding of IMC are discussed in Sections 6.2 - 6.4 above. The research has produced three new process models that uniquely address the IMC implementation process and offer new contributions to IMC theory, practice and methodology.

6.8.2 To Better Understand the role of the Brand Identity Construct in the Implementation of IMC

This objective has been achieved (refer to Sections 6.2.4, 6.2.5, 6.2.6 and 6.2.7). Brand identity statements are utilised consistently by all of the five agencies studied. The brand manifesto is the most favoured format. The role of the brand identity statement is primarily to ensure strategic consistency between the client's corporate brand and their product brands, across all marketing communications.

6.8.3 To Better Understand the role of Advertising Agency Account Planners in the Implementation of IMC

This objective has been achieved (refer to Sections 6.2.1, 6.2.2 and 6.2.4). Account planners (or brand strategists) play critically strategic roles in the implementation of IMC in all the agencies studied. Not only are they the consumer's champion within the agency, they are also the chief guardian of the client's brand within the agency. Their primary task is to prepare the creative brief, and within that brief to provide insights into how the brand can maintain meaningful and enhanced relationships with consumers, and effectively engage with them.

6.8.4 To Gain Insight into the Current Practice of IMC by New Zealand Advertising Agencies

This objective has been achieved (refer to Sections 6.2.9 and 6.2.10). The five New Zealand advertising agencies studied are all committed to IMC strategies where tactical actions are informed by strategic imperatives. There has been a significant development in the understanding and implementation of IMC by the participants in this research when compared to participants in Eagle and Kitchen's 2007 research (the most recent previous study undertaken of New Zealand agency executives' understanding and practice of IMC).

It is now time to conclude this study.

6.9 Final Conclusion

In this chapter conclusions relating to the research questions and the research problem - against the backdrop of the literature reviewed in Chapter 2 - have been discussed. Theoretical, practical and methodological implications of the research have been

suggested; the limitations of the research have been acknowledged, and a number of directions for further research have been proposed.

The research supports the contention that the brand identity statement plays a fundamental role in the implementation of IMC by the agencies studied. The research also suggests that brand manifestos, the favoured expression of the brand identity statement within the agencies studied, play an important strategic role in this process. The research further suggests that account planners, as brand strategists, adopt a dual role within New Zealand advertising agencies, as both brand-champions and consumer-champions within their agency. These insights represent a significant contribution to the IMC literature.

In their 2004 text, *IMC - The Next Generation*, Don and Heidi Schultz identify a range of future challenges for IMC. Of particular relevance to this thesis is the challenge: 'Making the brand the key element in the marketing effort'. They observe:

“As technology has reduced the ability of the organisation to make innovations in products or services, marketers must rely more and more heavily on brands and brand communication to sustain competitive advantages ... Brand communication must move from being a simple tactical activity to becoming the primary strategic tool of the organisation... The skill of firms to develop communication programs that build relationships with customers and prospects is probably the most important capability organisations will have in the twenty-first-century marketplace. For those skills to develop, senior management must be actively engaged in brands, in marketing, and in marketing communication. The people at the top must support the development of new marketing, communication, and branding concepts as aggressively as they presently support research and development of products and services.” (p. 381).

This thesis argues for a renewed emphasis on the brand as a fundamental element and focus in the IMC implementation process. The thesis calls for renewed recognition that “The brand is... the dynamic hub around which all marketing effort and communication revolves.” (Schultz & Kitchen, 2000a, p. 55)

While acknowledging that IMC must start at the top, and that the organisation must be customer-focused with customer oriented marketing, that there must be cross-functional integration across an organisation, and centralised communication as much as possible - making the brand the key element in the marketing effort should remain a priority. Brand manifestos facilitate that process - as do other forms of brand identity statement.

Perhaps it is time for the field of Integrated Marketing Communications (IMC) to be renamed Integrated Brand Communications - IBC (Duncan & Mulhern, 2004).

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Appendices

- 1. Research Protocol Documents**
- 2. Proprietary Agency Documents**

Appendix 1: Research Protocol Documents

1.1 Participant Information Sheet

1.2 In-Depth Interview Protocol

1.3 Participants Consent Form

1.4 Document Consent Form

1.5 Confidentiality Agreement (Between Primary Researcher and Participants)

1.6 Confidentiality Agreement (Between Primary Researcher and Transcriber)

1.7 Ethics Approval for Research

Appendix 1.1: Participant Information Sheet

Date Information Sheet Produced: 23 November 2012

Project Title

An exploration of how advertising agencies formulate Integrated Marketing Communications (IMC)

An Invitation

My name is Dave Bibby and I am a Doctoral Candidate in the Marketing, Advertising, Retailing and Sales Department of the Business School at AUT University. I wish to invite you to partake in a research study that investigates the process whereby advertising agencies create integrated marketing communications campaigns for their client brands. Your participation is voluntary and you may withdraw at any time prior to the completion of the interview.

This research project will assist in the completion of my doctoral research degree that I am currently undertaking.

What is the purpose of this research?

The research looks at the creation of integrated marketing communications by New Zealand advertising agencies. Even though the study and practice of IMC is widespread in New Zealand and overseas there still remains imprecision and disagreement about the concept and the process. This study is designed to investigate how New Zealand advertising agencies define the IMC concept and how they implement the concept in practice. It will look at the roles different agency and client personnel play in the process. It will study the decision making processes undertaken by key advertising and marketing executives as they create integrated marketing communications. The study when completed will assist in the completion of my doctoral degree that I am currently undertaking at AUT University. It is intended that the findings will be presented as an academic conference paper and as an academic journal article on completion. A business magazine article may also be published.

How was I identified and why am I being invited to participate in this research?

The research will explore the practice of five New Zealand advertising agencies, representing a cross-section of the industry. They will reflect the diversity of the industry in terms of agency size (billings and number of fulltime employees), ownership, local and overseas affiliations, marketing communication philosophy, media mix, range of services offered and length of time established in the New Zealand marketplace. Senior executives from each agency will be interviewed in-depth concerning their role in the creation of integrated marketing communications for a single campaign for a single client brand. The senior executives will include the agency CEO (or Managing Director), the senior client service executive working on the brand, the senior account planner or brand strategist working on the brand and the senior creative executive working on the brand. The senior client marketing executive responsible for the brand will also be interviewed. You have been invited to participate in this research because you fill one of the above roles at one of the five agencies selected for the study or at an associated client organisation of one of the five agencies.

What will happen in this research?

The research involves data collection by way of document analysis and in-depth interviews.

The interviews are free-form in nature using predetermined open-ended questions. The interviews are designed to encourage participants to talk about the advertising creative process, in their own way and from their own perspective, reflecting their particular role in the process. The interviewer will ask questions, take notes and audio-record the interview for transcribing at a subsequent date.

In addition, I will ask your permission for access to selected agency and client documents relevant to the research. For example: client briefs to the agency; agency creative briefs, relevant secondary data compiled by the client or the agency; relevant agency qualitative research data; previous advertising for the brand and relevant agency or client proprietary products such as statements of corporate creative philosophy or research philosophy or brand identity models. You will be asked to sign a consent form to approve the researcher's access to documents.

Furthermore, the study will use decision systems analysis (DSA) to map the key decisions, actions and interactions of agency executives and their clients as they create and implement the agency's creative brief and create integrated marketing communications for the selected brand. DSA is not a new methodology. These logical, binary flow charts have been used for over fifty years to study decision-making behaviour. The flow diagrams developed by the researcher will be checked by two or more principal respondents for review, revision and confirmation that the diagrams are accurate.

What are the discomforts and risks?

It is anticipated that there will be no discomfort or risks for respondents during the administration of this research.

What are the benefits?

The research is being undertaken in order to complete a doctoral thesis. The research outcomes should benefit both the academic community and the marketing and advertising industry. The research has the potential to enhance the practice of creating integrated marketing communications. The DSA summary charts can potentially aid advertising agency decision makers to better structure their decision processes.

How will my privacy be protected?

Although the researcher will know the identity of each participant all information received will be coded so as to disguise each respondent and their employer and any brands being studied.

What are the costs of participating in this research?

The research requires participants to give up to 60 minutes of their time for the completion of the in-depth interview. A few respondents will also be asked to review the DSA summary charts. This will be in addition to their in-depth interview time.

What opportunity do I have to consider this invitation?

The project requires the consent of the agency CEO agreeing to the participation of the agency, its senior staff and a senior client executive in the research. Each individual participant will then have up to one week to make up their own mind whether to participate in the research or not.

How do I agree to participate in this research?

Just by signing the attached Consent Form.

What do I do if I have concerns about this research?

Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor, Professor Roger Marshall, rmarshal@aut.ac.nz , 921 9999 ext 5478.

Concerns regarding the conduct of the research should be notified to the Executive Secretary, AUTEK, Dr Rosemary Godbold, rosemary.godbold@aut.ac.nz 921 9999 ext 6902.

Whom do I contact for further information about this research?

Researcher Contact Details: Dave Bibby, dave.bibby@aut.ac.nz

Project Supervisor Contact Details: Professor Roger Marshall, rmarshal@aut.ac.nz

Approved by the Auckland University of Technology Ethics Committee on type the date final ethics approval was granted, AUTEK Reference number 12/289.

Appendix 1.2: In-Depth Interview Protocol

Date Protocol Produced: 4 October 2012

Project Title

An Exploration of how Advertising Agencies Formulate Integrated Marketing Communications (IMC)

Introduction

“This is a framework for discussion. This is a free-form interview that is designed to encourage you to talk about the creative process in your own way. It is important that we cover all the issues identified by the questions below”.

Questions

- 1) Do you have account planning people in your agency? If not, why not?
- 2) What do you see as the role of the Account Planner in your agency?
- 3) How does the Account Planner relate to the client, the account service people and the creatives in your agency?
- 4) What is the role of the creative brief in your agency?
- 5) Who is responsible for preparing the creative brief in your agency?
- 6) Is there an agency template for writing the creative brief in your agency?
- 7) What is the role that brands and branding play in the creation of your marketing communications?
- 8) Does your agency or client company have any proprietary statements or models concerning brand identity, brand dna, brand footprints, brand onions or a similar concept? Please explain.
- 9) Does your agency use a (generic) brand identity statement in the creation of a marketing communications campaign for a client brand? Please explain how this works. What are the key elements or components in this statement or model?
- 10) How would you define Integrated Marketing Communications (IMC)?

- 11) What are the benefits (if any) of Integrated Marketing Communications (IMC)?
- 12) How does your agency integrate the integrated marketing communications of brands that the agency promotes?
- 13) From what source(s) do you draw your understanding of the theory and practice of Integrated Marketing Communications (IMC)?
- 14) How does the client brief inform the creative brief and the media brief in your agency? What is the role of your account service people in this process?
- 15) What process (or steps) does your agency follow between receiving a client brief and producing finished marketing communications that engage the prospect and/or consumer?
- 16) After marketing communications have appeared in the media is there any subsequent evaluation of the communication's effectiveness? What forms of evaluation are common or mandatory? What are the key decision points in this process?
- 17) What contribution(s) does your agency make towards solving your client's business problems? How do you measure these outcomes?

Approved by the Auckland University of Technology Ethics Committee on type the date final ethics approval was granted, AUTEK Reference number type the reference number.

Appendix 1.3: Participants Consent Form

Consent Form: For use when interviews are involved.

Project Title: An Exploration of How Advertising Agencies Formulate Integrated Marketing Communications (IMC).

Project Supervisor: Professor Roger Marshall

Researcher: Dave Bibby

- I have read and understood the information provided about this research project in the Information Sheet. Dated: dd mm yyyy.
- I have had an opportunity to ask questions and to have them answered.
- I understand that notes will be taken during the interviews and that they will also be audio-taped and transcribed.
- I understand that I may withdraw myself or any information that I have provided for this project at any time prior to completion of data collection, without being disadvantaged in any way.
- If I withdraw, I understand that all relevant information including tapes and transcripts, or parts thereof, will be destroyed.
- I agree to take part in this research.
- I wish to receive a copy of the report from the research (please tick one):

Yes No

Participant's Signature:.....

Participant's Name:.....

Participant's Contact Details (if appropriate):

.....

Date:.....

Approved by the Auckland University of Technology Ethics Committee on type the
date on which the final approval was granted AUTEK Reference number type the
AUTEK reference number

Note: Both the Participant and the Primary Researcher should retain a copy of this form.

Appendix 1.4: Document Consent Form

Permission to access agency and client documents relevant to the research.

Project title: An Exploration of How Advertising Agencies Formulate Integrated Marketing Communications (IMC).

Project Supervisor: Professor Roger Marshall

Researcher: Dave Bibby

- I have read and understood the information provided about this research project in the Information Sheet dated 23 November.
- I have had an opportunity to ask questions and to have them answered.
- I agree to grant permission for the researcher to access selected agency and client documents, relevant to the research, which will be provided to the researcher by the agency and/or the client on request. For example: client briefs to the agency; agency creative briefs, relevant secondary data compiled by the client or the agency; relevant agency qualitative research data; previous advertising for the brand and relevant agency or client proprietary products such as statements of corporate creative philosophy or research philosophy or brand identity models.
- I understand that I may withdraw this consent or any information or documents that I have provided for this project at any time prior to completion of data collection, without the agency or client being disadvantaged in any way.
- If I withdraw my consent, I understand that all relevant information including copies of the supplied data, tapes and transcripts, or parts thereof, will be destroyed.
- I wish to receive a copy of the report from the research (please tick one):

Yes No

Agency CEO's Signature:.....

CEO's Name:.....

CEO's Contact Details (if appropriate):.....

.....

.....

Date:.....

Authorised Client Representative's signature:.....

Authorised Client Representative's Name:.....

Client Representatives's Contact Details (if appropriate):

.....

.....

Date:.....

Approved by the Auckland University of Technology Ethics Committee on type the date on which the final approval was granted AUTEK Reference number 12/289

Note: Both the Participants and the Primary Researcher should retain a copy of this form.

Appendix 1.5: Confidentiality Agreement (Between Primary Researcher and Participants)

Project title: An Exploration of how Advertising Agencies Formulate Integrated Marketing Communications (IMC)

Project Supervisor: Professor Roger Marshall

Researcher: Dave Bibby

- I understand that all the material I study and record is confidential.
- I understand that the contents of the tapes and interview notes that I make can only be discussed with the participant or with my AUT research supervisors.
- I will not keep any copies of information gained or allow third parties access to them without the prior permission of the participant.

Primary Researcher's Signature:.....

Primary Researcher's Name:.....

Primary Researcher's Contact Details (if appropriate):

.....
.....

Date:.....

Project Supervisor's Contact Details (if appropriate):

.....
.....

Approved by the Auckland University of Technology Ethics Committee on type the date on which the final approval was granted AUTEK Reference number type the AUTEK reference number

Note: Both the Participant and Primary Researcher should retain a copy of this form.

Appendix 1.6: Confidentiality Agreement (Between Primary Researcher and Transcriber)

Project title: An Exploration of how Advertising Agencies Formulate Integrated Marketing Communications

Project Supervisor: Professor Roger Marshall

Researcher: Dave Bibby

- I understand that all the material I will be asked to transcribe is confidential.
- I understand that the contents of the tapes or recordings can only be discussed with the researchers.
- I will not keep any copies of the transcripts nor allow third parties access to them.

Transcriber's Signature:.....

Transcriber's Name:.....

Transcriber's Contact Details (if appropriate):

.....
.....

Date:.....

Project Supervisor's Contact Details (if appropriate):

.....
.....

Approved by the Auckland University of Technology Ethics Committee on type the date on which the final approval was granted AUTEK Reference number type the AUTEK reference number

Note: Both the Transcriber and the Primary Researcher should retain a copy of this form.

Appendix 1.7: Ethics Approval for Research

AUTEC SECRETARIAT

27 November 2012

Roger Marshall

Faculty of Business and Law

Dear Roger

Re Ethics Application: 12/289 An Exploration of the Extent to Which Account Planners Utilize a Brand Identity Statement When Formulating Integrated Marketing Communications.

Thank you for providing evidence as requested, which satisfies the points raised by the AUT University Ethics Committee (AUTEC).

Your ethics application has been approved for three years until 27 November 2015.

As part of the ethics approval process, you are required to submit the following to AUTEC:

- A brief annual progress report using form EA2, which is available online through <http://www.aut.ac.nz/research/research-ethics/ethics>. When necessary this form may also be used to request an extension of the approval at least one month prior to its expiry.
- A brief report on the status of the project using form EA3, which is available online through <http://www.aut.ac.nz/research/research-ethics/ethics>. This report is to be submitted either when the approval expires on or on completion of the project.

It is a condition of approval that AUTEC is notified of any adverse events or if the research does not commence. AUTEC approval needs to be sought for any alteration to the research, including any alteration of or addition to any documents that are provided to participants. You are responsible for ensuring that research undertaken under this approval occurs within the parameters outlined in the approved application.

AUTEC grants ethical approval only. If you require management approval from an institution or organisation for your research, then you will need to obtain this. If your

research is undertaken within a jurisdiction outside New Zealand, you will need to make the arrangements necessary to meet the legal and ethical requirements that apply there.

To enable us to provide you with efficient service, please use the application number and study title in all correspondence with us. If you have any enquiries about this application, or anything else, please do contact us at ethics@aut.ac.nz.

All the very best with your research,

Dr Rosemary Godbold

Executive Secretary

Auckland University of Technology Ethics Committee

Cc: Dave Bibby dave.bibby@aut.ac.nz

Appendix 2: Proprietary Agency Documents

- 2.1 Agency One: Client Planning Brief Template**
- 2.2 Agency One: Long Brief Template**
- 2.3 Agency One: Short Brief Template**
- 2.4 Agency One: Post Campaign Analysis Template**
- 2.5 Interbrand: Brand on a Page Template**

Appendix 2.1: Agency One: Client Planning Brief Template

Brand:

Launch Date:

What is this Brief for? Specifies about the task at hand (e.g. what's the brand, what's the product).

Where are we now? What's our current situation (e.g. share, sales, position in market, space in consumers' minds)?

What is the problem we have? Clearly define the business problem and/or opportunity.

What does success look like?

- Where do we want to be?
- What do we want our customers to think/feel/do?
- Include any specific objectives/KPIs.

What is stopping us from achieving that? What are the barriers in our way?

What key insights do we have that will help?

- Customers
- Market
- Product/brand

Budget What is the total campaign budget for all elements? Have you given any thoughts to allocations?

Timings When do you want to be in the market? Are there any production timings to bear in mind? What are your expectations on the duration of the campaign?

Mandatories/Considerations Are there specific elements that we have to consider/include?

Appendix 2.2: Agency One: Long Brief Template

How will we grow the business?

Where will the growth come from?

What do they do today? Why?

Unmet need/Untapped opportunity.

What will the brand propose?

Why is this credible?

How do we want the target to respond?

How should we talk to the target?

Practical considerations?

Appendix 2.3: Agency One: Short Brief Template

Client: Job: Job No: Date:

Get:

Who:

To:

By:

Like this:

What we need:

Timing:

Brief into Creative:

Internal review:

Present to Client:

Production Budget: (excluding agency internals)

Creative Director: Planner: Account Service: Client Contact:

Appendix 2.4: Agency One: Post Campaign Analysis Template

I don't think much of a man who is not wiser today than he was yesterday. *Abraham Lincoln*

If the past cannot teach the present and the father cannot teach the son, then history need not have bothered to go on and the world has wasted a great deal of time. *Russel Hoban*

Learning is like rowing upstream, not to advance is to drop back. *Chinese Proverb*

The great thing in the world is not so much where we stand as in what direction we are moving. *Anon*

It is amazing how much you accomplish when it doesn't matter who gets the credit. *Anon*

Coming together is a beginning, keeping together is progress, working together is success. *Henry Ford*

Do you want a collection of brilliant minds or a brilliant collection of minds. *Meredith Belbin*

Teams share the burden and divide the grief. *Doug Smith*

No one can whistle a symphony. It takes an orchestra to play it. *H E Luccock*

Restlessness and discontent are the first necessities of progress. *Thomas Edison*

The definition of stupidity is doing the same thing over and over again and expecting different results. *Albert Einstein*

Experience is simply the name we give our mistakes. *Oscar Wilde*

A person who never made a mistake never tried anything new. *Albert Einstein*

Always remember that the future comes one day at a time. *Dean Acheson*

He that will not apply new remedies must expect new evils for time is the greatest innovator. *Francis Bacon*

There is nothing so easy to learn as experience and nothing so hard to apply. *Josh Billings*

Good judgement comes from experience and often experience comes from bad judgement. *Clarence Day*

Experience is one thing you can't get for nothing. *Oscar Wilde*

Flaming enthusiasm backed up by horse sense and persistence is the quality that most frequently makes for success. *Dale Carnegie*

In order to succeed your desire for success should be greater than our fear of failure. *Bill Cosby*

AGENCY ONE:

Onwards and Upwards

This document is not designed to add to your already over-loaded paper work.

It is designed, however, to ensure we keep moving forward.

After all, why would we continue in this business, if we didn't get better each time.

So,

Embrace it.

Run with it.

And let's make sure we hold true to the work, the work, the work.

The Questions in a Nutshell

THE NITTY GRITTY'S? Just some background for future reference.

WHAT WAS OUR INVESTMENT? Budget and budget breakdown.

WHAT WERE WE TRYING TO DO? What were the business and communication objectives?

WHAT WAS OUR PLAN OF ATTACK? A quick snapshot of the strategic approach.

WHAT GOT THE CREATIVE JUICES FLOWING? Our short brief.

WHAT DID WE KEEP IN THE BACK OF OUR MINDS? Were there any considerations or mandatories that we had to include?

WHAT WAS THE BIG IDEA AND CREATIVE EXECUTIONS? Snapshot of the creative work.

WHERE DID PEOPLE SEE IT? Snapshot of media and channels.

DID IT DO WHAT WE WANTED IT TO DO? Did it achieve our objectives?

DID IT MAKE US PROUD? Did we tell all our mates that we worked on it?

DID WE HAVE FUN MAKING IT HAPPEN? Or did we make our partners want to run away when we got home?

WOULD WE DO IT AGAIN? What did we learn – good or bad?

Appendix 2.5: INTERBRAND: Brand on a Page Template

What are our values?
What market are we in?
What is our positioning in that market?
What is our 'personality'?
Who are we aiming at? (target audience)
What is our key insight about this audience? What are the key drivers for them?
What is the most inspiring and compelling thing we can convey to them? (brand proposition)
How do we support that proposition?
What is our tone of voice? Are there any visual guidelines?