

# Who's going to sit at the client's top table?

**Jeremy Bullmore** makes some predictions for the future of integrated communications

**F**UTURE HISTORIANS OF our trade will be baffled. Towards the end of the 20th century, more and more marketing companies were converted to a belief in seamless, all-media, 360°, harmonised, orchestrated, integrated communications. And at exactly the same time, the purveyors of those communications disintegrated completely.

Advertising agencies have always developed in response to client demand. So why, historians will wonder, was client demand for integrated communications met, paradoxically, by supplier fragmentation?

Back in 1964, when *Admap* was born, clients who needed help with their marketing knew whom to turn to first; there was no hesitation.

They would get in touch with an advertising agency. And if the agency was a full-service agency, it could provide the client with the following:

- ▶ a market analysis
- ▶ a business plan
- ▶ a marketing plan
- ▶ a communications plan
- ▶ a media plan, and
- ▶ creative work in all media, including merchandising, packaging, point-of-sale and PR.

Like the man who never realised that he spoke prose, clients got integrated communications without even realising it.

Forty years later, hesitation is rife. Today, as first port of call, clients may choose between a brand consultancy, a media company, a corporate identity house, a management consultant, a public relations counsellor – or, still, an advertising agency.

The choice of an agency is no longer automatic. It is not unusual for an advertising agency to be briefed on the launch of a new product with the name, pack, positioning, budget and media strategy already determined: all that is required of them is some ads.

The bigger agencies used to have an almost honorary place at the client's top

table. Today, the chair at the top table remains either unoccupied – or is occupied serially by a succession of different advisers.

The territory for which all these disciplines compete is brand strategy. To be of real value, strategists need the earliest possible access to a client's ambitions. And because advertising agencies used to be the first call for marketing companies, they were also expected to be their lead strategists. They were often brilliant at it, and still can be. The problem was this: brought up under the commission system, agencies never learned how to charge for things. A meticulous piece of account planning, infinitely more actionable than anything a management consultant could deliver, could be of incalculable worth. A management consultant might charge a million pounds for theirs. An agency would give it away free: as a banded offer with the scripts and the layouts.

And so, as the commission system crumbled as clients strove to reduce costs, agencies started to dispose of their specialist departments – a move welcomed by the specialists themselves. As second-class citizens in obscure departments, they had long been denied their share of fame. Today, media people, packaging people, brand identity people, internal communications people, public relations advisers all now thrive in specialist companies of their own. And all, of course, offer some strategic capability.

So the return of the multi-skilled agency, at least for the foreseeable future, seems unlikely. Talented people enjoy working under their own specialist banners. Clients remain sceptical of any one agency brand claiming to be best in class across every creative discipline. The 1980s offer of the one-stop-shop was comprehensively rejected by clients – and has not been renewed. That seat at the top table will continue to be occupied by exceptional individuals from many different disciplines. The struggle for

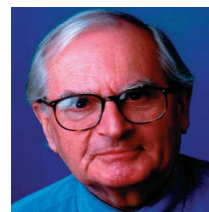
integrated communications will continue to be a struggle.

One new development is already apparent. Nobody knows if it is the beginning of a trend or a short-lived experiment destined for failure. But because it is client driven, it demands attention.

For the first time ever, huge, global companies have put up their total marketing communications assignments for competitive review – approaching not the familiar operating agencies but their parent companies. Until very recently, the role of the holding company has been primarily financial and administrative. If parent companies are to become professional brands as well, with their own assigned clients, the shape of the sector will be significantly altered.

The logic is attractive. What do clients of this magnitude want? They want access to the widest variety of specialist talent, available globally – and with a single point of contact to ensure harmony and efficiency. Answer: appoint a marketing communications parent company, and charge them with the task of mustering and managing a tailor-made team, representing all the talents.

The trial is on and the logistics will be challenging. Such matrix-like structures will never be universally adopted because they will never be universally demanded. But 40 years from now, those reticent parent companies, with their aggressively unexciting names, may well have earned their tentative new designation as the new full-service agencies. ■



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