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Account Planning in the Mexican Advertising Industry: A Snapshot of a Discipline in Growth

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UNIVERSITY OF MIAMI

ACCOUNT PLANNING IN THE MEXICAN ADVERTISING INDUSTRY: A
SNAPSHOT OF A DISCIPLINE IN GROWTH

By

Luis E. Lopez-Preciado

A DISSERTATION

Submitted to the Faculty
of the University of Miami
in partial fulfillment of the requirements for
the degree of Doctor of Philosophy

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May 2010

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ACCOUNT PLANNING IN THE MEXICAN ADVERTISING INDUSTRY: A
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A study of the adoption and adaptation of the discipline of Account Planning in the Mexican advertising industry. In the last 20 years, the advertising industry has transformed around the world as large conglomerates have formed and consolidated in the largest advertising markets. The Mexican industry was ranked 12th in 2006 and 14th in 2008 based on advertising expenditure. However, little is known about the practices of local advertising agencies, and the way these practices were adopted. This study seeks to address this dearth in the literature by looking specifically at the discipline of Account Planning. Using a Grounded Theory methodological approach, through in-depth interviews with advertising practitioners a tentative model is developed. The findings provide insight into the lack of clarity as to how account planning is conceptualized. According to virtually all the participants, account planning in Mexico is more a verb than a concept which is adapted to the corporate culture of each agency, and to the style of the person heading the department. Limitations of this study and future research recommendations are also presented.

DEDICATION

“Soy quien soy porque a todos les pedí un poquito prestado.” (I am who I am because I borrowed a bit from everyone). I would like to dedicate this dissertation to every single one of you who has contributed to making me the person I am today. A mi familia, ustedes son el pilar que me sostiene y la fuerza que me impulsa. To my friends, you are the family I have made for myself and one of the greatest reasons why I feel grateful every day. To my professors, teachers, and all those who nourished my mind, thank you, for you have given me the inspiration to always move forward.

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Finally, I would also like to acknowledge the advertising practitioners who took the time out of their already overbooked schedules to sit down and talk to me about their work. Throughout each and every interview I was able to remember why I fell in love with this profession, and how fortunate I was to encounter individuals who were equally passionate about the work they do. Thank you all for expanding my mind through your stories.

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CHAPTER 1: INTRODUCTION

During the 1980s, the advertising industry experienced a series of changes worldwide. As multinational corporations entered new markets, their advertising partners followed suit by either merging with or purchasing local agencies. Many of these changes were a direct consequence of the early stages of globalization, manifested in a surge in neoliberal policies around the world (Leslie, 1995). This has had important consequences for advertising practitioners that academics are just now exploring. In many instances, it is too early to comprehend the ramifications of the concentration of marketing communication agencies into global conglomerates. However, as advertising agencies work in tandem with their large corporate clients simultaneously in multiple nations, there appears to be a push toward standardization of business practices (Leslie, 1995; De Mooij, 1994).

Historically, academic studies looking at advertising have centered their attention on the nations of the North Atlantic, Western, free-market model due in part to the concentration of scholarly publications in these nations. However, recently there has been a shift and scholars are now looking at many markets outside this group of developed nations with mature markets. A result of this phenomenon is a surge in the academic literature in studies which focus on the adoption or effects that advertising practices have in different markets.

A particular emphasis has been placed on the BRIC group (Brazil, Russia, India, and China), due to the fact that in recent years they have grown four times faster than the rest of the world, and are expected to continue exhibiting double digit growth in the near future (King, 2007). The focus of many of these studies has been on how advertising works in these markets, on how to make it more effective, and to a lesser extent, on the

structure and practices of the local industries themselves. Although this is a positive step forward for the discipline, there is much that still needs to be done, particularly in looking at markets that fall outside of the two aforementioned groups, and at certain practices that have not been as generalized as the traditional areas of account management and creative.

Using a Grounded-Theory (GT) approach, this study seeks to address the dearth of literature by looking specifically at how the discipline of Account Planning (AP) has been adopted in the Mexican advertising industry by certain agencies which are members of the Mexican Association of Advertising Agencies (AMAP for its name in Spanish: Asociación Mexicana de Agencias Publicitarias).

There is no unified definition as to what AP is. In fact, there are as many different definitions of AP as there are corporate cultures which have adopted the practice.

Bendinger (2008) defines it as follows:

Planners are *involved* and *integrated* into the creation of marketing strategy and advertising. Their *responsibility* is to bring the consumer to the forefront of the process and to *inspire* the team to work with the consumer in mind. *The planner has a point of view about the consumer and is not shy about expressing it.* (Emphasis in original, p. 11)

According to Steel (1998), AP was borne out of the need for advertising strategy to focus more on consumers and less on the “hunch” of creative teams. As such, it has been generally recognized to be a ‘best practice’ by practitioners in the United Kingdom (UK) and the United States (USA), where it originated and matured before being exported to smaller markets (Patwardhan, Patwardhan, & Vasavada-Oza, in press). Presently, AP has been systematically adopted by the industries of most mature advertising markets throughout the world. The extent is such that many have created chapters of the Account Planning Group (APG), a professional organization of planners

that is now present in several nations, including Argentina, Belgium, France, Spain, and Sweden, in addition to the UK and the USA (Baskin & Pickton, 2003).

The Mexican advertising industry, having been grossly overlooked in the academic literature, is ideally suited for this study not only because of its vicinity and ties with the USA, but also because of its sheer size, the 14th largest in the world (Barnes Reports, 2008), and the fact that it is primarily controlled by multinational agencies. Additionally, in 1993, the Mexican advertising expenditure was a total of \$1.7 billion dollars (García Calderón, 2007); by 2008 it had reached \$6.9 billion and by 2009 it is expected to go up to \$7.4 billion (Barnes Reports, 2008). This exponential growth can be attributed to two major factors: the expansion of the Mexican television monopoly (Televisa, S.A. de C.V.) into a duopoly (Televisa, and now TV Azteca, S.A. de C.V.), and the effects of the North American Free Trade Agreement (NAFTA) and its policies of market liberalization on all other sectors of the economy, which in turn has resulted in increased advertising expenditure aided by the presence of international advertising conglomerates.

This growth has brought with it a series of changes into how advertising is planned, developed and executed in Mexico. Among these changes is the incorporation of AP into the organizational charts of most international agencies operating in the country. However, considering that the discipline has been adopted differently in diverse nations (Butcher & McCulloch, 2003; Crosier, Grant, & Gilmore, 2003; Patwardhan et al., in press), it is important to understand how it has been adopted in a country such as Mexico, not only because of its unique circumstances, but also because of what it might mean for the advertising industries of other, similar, nations, and of the world as a whole.

The scope of this dissertation is to develop an exploratory study of a field that has not been covered previously by the academic literature. Because of its unique circumstances, it does not conform to the traditional structure of a dissertation. In fact, the purpose of this study is to shed light on a potential area of inquiry for the future. During the summer of 2009, 18 in-depth interviews were conducted with advertising/marketing-communications specialists responsible in one way or another for the functions associated with AP. The majority of participants worked for agencies that were members or affiliates of AMAP, but a few worked either as free-lancers or consultants.

The current history and current trends of AP around the world, as well as the Mexican advertising industry are covered in chapter 2. Furthermore, a brief overview of the literature on Organizational Cognition, a subfield of organizational culture studies that is used in the interpretation of results, is also included. The research purpose and central research questions that inform this study close the chapter. Chapter 3 discusses GT extensively, from origins and evolution, to the methodology's constructs and criteria for evaluation. Additionally, relevant literature about interviews, the method utilized, is presented. A discussion of the issues of reliability and validity is included. The presentation of results is the sole focus of chapter 4. The results are presented according to the themes that emerged during the analysis of the interview participants. Chapter 5 discusses the results and develops a tentative GT model of AP in the Mexican industry, from the perspective of planners themselves. Finally, chapter 6 discusses the study's limitations, implications, and recommendations for future research.

CHAPTER 2: LITERATURE REVIEW

THE ADVERTISING INDUSTRY

During the 1980s, a steady progress toward increasing integration of the global economy became manifest in many ways. As corporations realized that operating in saturated markets limited their growth potential considerably, they began to expand in developing nations. This was made possible by a series of factors put in place at the end of World War II. In her 1994 study of advertising worldwide, Marieke De Mooij identified the following as crucial elements in setting the world stage for transnational corporations to flourish:

- The creation of the International Monetary Fund (IMF), which allowed the world to trade with a standardized system of liquidity based on money (USA), gold, or other means of payment set forth by a central institution.
- A world trade system which had the sole purpose of leveling the field for corporations to operate under specific rules that favored all parties involved: the corporations by allowing them access to foreign markets, and governments by creating a system of tariffs and trade that best served its national interest (this was crystallized in the passing of the General Agreement on Tariffs and Trade or GATT, to which most nations adhered).
- The ensuing world peace, devoid of large scale conflicts with active combat led the capitalist and socialist blocs of nations to work on extending the power of their influence to the developing nations. In many instances this was achieved by way of commercial ties between nations.
- The economic growth that resulted from the boom of the industrialized nations was

felt the world around in technological developments and an increase in the overall standard of living of even the poorest nations that had commercial ties with the outside world.

- Finally, the impact that developments in communication technologies has had on global trade cannot be understated. More efficient communication routes allowed faster distribution of goods and services; satellites and computers allowed information to be relayed from any point of the world to another in a matter of seconds, at increasingly lesser costs, which also contributed to expansion of operations in any market where an enterprise was viable.

De Mooij (1994) states that all successful multinational corporations benefited from the previously listed circumstances, relying heavily on them to push their enterprises into the global stage. In fact, she makes a clear differentiation between domestic, international, multinational, transnational, and global corporations according to the extent to which their operations are carried out with the strategic foresight of serving local or global markets.

Within this climate, large corporations from the industrialized nations of the North Atlantic and Japan were able to flourish and expand their operations into less mature markets. Most of these enterprises had a longstanding relationship with advertising agencies from their domestic markets, who were encouraged to follow into these new markets (De Mooij, 1994).

However, the complexities of the local business environments in many of these nations limited the entrance or operations of the agencies. As a quick fix to this problem, larger foreign agencies adopted different strategies. The first of which was to enter to the

market as they were already constituted. For nations with legal restrictions or strong local advertising industries, this presented a problem. As a logical consequence, these large agencies either merged with local ones, or bought them outright when possible. The majority of these movements originated during the 1980s, but by the 1990s, a full scale revolution of the industry as a whole took place throughout the world (De Mooij, 1994).

In fact, by 1993 the concentration that had taken place was such, that the top ten agencies had billings in the hundreds of millions of dollars, and their parent groups in the billions worldwide (Anonymous, 1993). The changes that this new environment created were initially felt at the structural level, due to the expansions through mergers and acquisitions. However, within a few years modifications at the systemic level led the industry through a stage of accelerated growth and change (Leslie, 1995). Some of the most obvious changes came by way of advertising practices themselves. Whereas the functions of account services and creative within agencies remain steadily equal worldwide, the other areas that have traditionally been the dominion of the large conglomerates have been adopted or rejected differently in the markets where these agencies expanded. One such example is the discipline of AP.

ACCOUNT PLANNING

Origins

The origins of AP take place in London, during the 1960s. However, the movement that set in motion the need for the discipline occurred a decade earlier. During the post World War II (WWII) era, the economies of the North Atlantic nations and their allies grew at a steady and consistent pace. Previous to this, corporations relied on advertising agencies as one-stop consulting firms that not only developed advertising

campaigns, but also provided larger scale market research for their clients; all this in addition to other marketing functions such as public relations (PR), special events (trade fairs), and even new product development (NPD) launches. Slowly, corporations realized the value of marketing in speeding the return on investment (ROI) and general flow of goods and services. As a consequence, many companies began structuring themselves along marketing lines (Pollitt, 2008). Consequently, once this new emphasis on marketing was internalized by corporations, many of the previous roles and responsibilities of agencies were taken in by the very companies which used to hire advertising researchers (Steel, 1998).

One of the changes that had a greater impact on the advertising industry was that of market research. When agencies had to do a series of different marketing tasks for their clients, it made perfect sense to have a group of people who focused solely on bringing in market data which would aid the development of overall marketing strategies. Within the new environment, it made less sense for advertising agencies to specialize on broad market research and there was a reduction in agencies' research departments. However, not all of these researchers were absorbed by the corporations who needed their products. In fact, many went into business for themselves, which in turn created a highly competitive environment (Pollitt, 2008).

Now, within the agencies, there were a few people who were staying behind in order to accommodate the needs of clients who still had research needs. However, those needs were also being modified by the marketplace itself. The recent improvements in research by non-agency professionals meant that in order to remain competitive, agencies were focusing more and more solely on the development of ads. Ironically, the data

which was emerging from market researchers was constantly improving in quality and in quantity, but it had not been developed with an advertising strategy in mind. In fact, it needed to be interpreted by advertisers who many times did a poor job of it (Pollitt, 2008).

By the mid 1960s, it had become apparent to some in the advertising world that there was a void in the process of strategizing advertising based on sound research. One of these men was Stanley Pollitt, an account executive promoted to the research and media department at Pritchard Wood Partners of London. For Pollitt, it was clear that account executives perspectives were compromised not only by their attempt to serve the interests' of their clients in an expedient manner, but also by the fact that they lacked the background and/or experience necessary to interpret the vast amounts of data available to them. So in 1965, Pollitt created the first account planning position at his agency. The purpose of the planner, who was not yet named that way, was to bring research into the process of developing the advertising, versus using it as a reactive strategy to support the position of either the account or creative teams. Unfortunately, the previous role of researchers in agencies had always been too "back room" (p. 23), and it became obvious that in order to make this concept work, it would be necessary to train planners from scratch (Pollitt, 2008).

By 1967, J. Walter Thompson's (JWT) London office had also adopted the planning idea thanks to the efforts of Stephen King. It was here that the term account planner was coined by an executive named Tony Stead. Since the planners were chosen to bridge the divide between media planners and account people, the name originated as a merger of the two titles (Baskin & Pickton, 2003). However, since its origins the purpose

of account planning was to be adapted to the agency's own culture. Whereas Pollitt had intended it to bring researchers into the process of developing advertising, King went further by combining consumer research with insights with the purpose of creating better advertising, based more on a systematic intellectual approach, rather than the traditional gut feeling of creatives in the past (King, 1989).

In 1968, Stanley Pollitt got together with two partners and formed Boase Massimi Pollitt (BMP), the first agency to have a free standing account planning department, with as many account planners as there were account executives. This was to be the institutionalization of AP as a discipline within the advertising industry, which in turn secured its future (Pollitt, 2008). Ten years after the official creation of AP, the Account Planning Group (APG), a professional organization, was formed "to support and promote the account planning function within advertising agencies" (Bendinger, 2008, p. 9).

Account Planning around the World

AP originated and grew unquestionably first and foremost in the UK, and to a lesser degree in the USA. However, as Baskin (2008) states, there are Account Planning Groups (APG) in many nations throughout the world, many of them outside of the North Atlantic developed model. This evidences that the discipline is continuing to grow. What is not clear is how it is being adopted around the world. The academic literature has addressed this question in a few nations.

Account Planning in the United States

The expansion of AP outside the UK was not to happen until the 1980's, when the American agency Chiat/Day decided to adopt it as a way of differentiating itself from the larger agencies of Madison Avenue (Bendinger, 2008). In fact, when Nissan's vice

president of marketing shopped around for an agency to take its \$150 million account, rather than going with one of the larger agencies established in New York or the American Midwest, he decided to award it to Chiat/Day. When questioned about his decision, he said: “All other agencies came and told us about the car business. We know the car business. Chiat told us about the car *buyer*.” (Lauterborn, 2008, p. 28). Although focus on consumers was not new, the approach by agencies on consumer insights rather than quantitative market research had not been a common industry practice before.

Within American agencies, there was already extended knowledge about the British use of AP, yet most agencies viewed it skeptically. In fact, Barry, Peterson, and Todd (1987) suggest that many American agencies were content with simply delivering advertising that was pleasing, without regard to its effectiveness. Consequently, the employees of agencies everywhere resisted its adoption. When Ogilvy and Mather (O&M) of New York tried to introduce it closely after Chiat/Day had, “the account management people revolted” (Lauterborn, 2008, p. 29). It took a former Chiat/Day employee to arrive years later to introduce it at O&M.

The resistance was strongly based on a lack of organizational clarity in terms of the roles, responsibilities, and affiliation of planners. In many agencies, there were only a couple of planners that were shuffled from account to account to simply express an opinion to either reinforce or reject a proposed strategy. Additionally, placing them within the agency structure was also problematic. The question of whether they belonged in creative since they wrote the brief, or under account to keep perspective did not fit adequately with the job description (where one existed) of a planner (Lauterborn, 2008).

Many agencies opted for changing their research departments to AP departments, a change that was only nominal. This was especially problematic since the American agencies had not experienced the decentralization of market research that their counterparts in the UK had gone through in the 1950s and 60s. As a result, many research departments were full of statisticians and heavily quantitative researchers who were experts at providing data about market conditions, market share percentages, or consumer demographics, but knew little or nothing at all about consumer insights and motivations. This did not work either, since “[a]ll account planners are researchers, but most researchers are not account planners” (Lauterborn, 2008, p. 30).

Finally, trying to create a special department for planners where the rest of the agency would cater to their needs and demands also created resentment in the creation of a “super class” within the agency. It took years for agencies to find a model that would fit their corporate culture and the needs of their clients. Today, many American agencies have planners in the media department, which seems to work well since the goal of both account and media planners is to find the best way to communicate to consumers in the way they want to be addressed (Lauterborn, 2008). However, it seems that the system which has proven to be most effective is that of having brand teams. Under this model, regardless of the team members’ background within the agency, they work in tandem to meet their clients’ needs and objectives, overcoming departmental divisions (Bendinger, 2008).

Although these obstacles represented a setback in getting planning accepted as a standard practice in many agencies, the largest problem was the lack of domestically trained planners. During the early years of adoption, most planners came from the UK,

and the clash that resulted from bringing young planners to tell people who had been in the business their entire lives that they were doing it all wrong proved to be disastrous (Lauterborn, 2008). This problem was also addressed in time with the emergence of planners within agencies' own structures. Additionally, the creation of the APG in the US, affiliated to the American Association of Advertising Agencies (AAAA), helped overcome this obstacle.

Despite the difficulties in getting AP started in the US, once agencies recovered from the initial shock of adoption, the discipline took off. However, as symptomatic of what was to happen in other places where AP was adopted, the discipline was tweaked to fit the local culture. In fact, roles and responsibilities of planners are not equal even in a planners' job description.

Account Planning in Scotland

Crosier et al. (2003) looked at the case of Scotland as a way to observe an enclosed advertising environment, which despite being connected with the larger transnational agency structure, still remained well contained within a distinct geographic and cultural area. The researchers carried out their study with the participation of 24 out of 28 Scottish agencies. Considering that the four which did not participate were smaller agencies that did not appear to have the function of AP in their offering to clients, the research team deemed their sample to be a virtual census.

Through semi-structured, face-to-face, in-depth interviews with the people who either are responsible for planning or actually carry out planning tasks, the authors found four key factors which determine how the discipline is performed, in addition to four distinct models of account planners' roles (Crosier et al., 2003).

The first of the four factors identified by the researchers is the way in which an agency carries out its business successfully, and they labeled it 'ethos'. This construct goes beyond the creative philosophy of an agency, and is more closely tied to the corporate culture. In its execution, agencies with an ethos that values account planning incorporated it in the whole process of strategy development. On the other end of the spectrum, there were also agencies which viewed planning as an additional expense, and preferred to use it only if specifically requested by their client, or by contracting freelancers when pitching for new business (Crosier et al., 2003).

The type and size of the client accounts was the second factor identified. The larger the account (financially), and the broader its marketing efforts (Scotland only, UK, or even Europe as a whole), the more agencies relied on planning. For local clients, account management served the functions of a planner.

In turn, the size of the agency also has an impact on whether AP is practiced. For agencies with a sizable income, investing in planning makes logical sense. In stark contrast, agencies which do not have the financial resources, having a planner represents a cost which is out of their reach. However, it is important to note that many of these agencies would still like to have a planner if their economy so permitted (Crosier et al., 2003).

Finally, the location of the agency also showed to be an important factor. Historically, Scotland has had two very different advertising environments which are also geographically divided. Whereas Edinburgh agencies strive for excellence in creativity and competes for accounts with London agencies, Glasgow's agencies are much take a more pragmatic approach and focus more on retail driven advertising. Consequently, this

results in Edinburgh agencies having well structured planning departments, whereas those of Glasgow have yet to acquire even one (Crosier et al., 2003).

Out of the roles identified by the study, voice of the consumer is the one which appeared most consistently. The second role is that of strategic pivot, identified by Baskin (2008) as strategic thinker/strategy developer; however, under this capacity falls writing the creative brief, another separate role also identified in her paper. The third role is that of creative catalyst; which is going beyond creative brief writer to jump-start the creative development process. Finally, the fourth role the researchers found is labeled client confidant; it is important to note that the size of the agency had an effect on this role.

Although these roles were seen to emerge as a result of the combinations of the four key determining factors and the organizational cultures of the agencies in the study, Crosier et al. (2003) also identified one more role. The role of super-planner is not seen as a new one, but it is in fact the combination of the four previously identified. Although very rare for one single person to become a super-planner, it did happen in certain agencies with certain clients.

Another issue of discussion in the Scottish study was that of the tension between planners and other agency employees. Not surprisingly, Crosier et al. (2003) found that the tension between account managers, creative teams and planners was actually conducive to creativity. Furthermore, the results suggested that pragmatic collaboration was better served when there was tension between the agency staff.

The final finding of this study was in regards to the future of the discipline. The research team found a different type of tension escalating between account planners and

media planners. Considering both have the goal of better reaching the consumer in an efficient manner, it is understandable that there might be some overlap. However, the emergence of marketing consultancies is providing account planners with an alternative arena that allows them to serve the interests of clients and consumers without having to become a conflict of interest within agency politics. This phenomenon can also be observed in the developed markets of the UK and the US (Steel, 1998).

Account Planning in Australia

The advertising landscape in Australia is a combination of the practices seen in the developed markets of the UK and the US, tampered down by a local pragmatism that is very Australian (Gaskin, 2001). With a population of close to 20 million, its advertising industry ranks 15th in advertising expenditure, according to the Barnes Worldwide Advertising Agencies Industry Report (2008). The industry's growth has been consistent during the last ten years, and is mostly dominated by large conglomerates based in the US or Europe.

Within this context, a few months after the Scottish study was published, Ken Butcher and Rod McCulloch (2003) presented their own study on AP in the Australian advertising industry. This study was carried out through in-depth interviews with six senior planners at leading agencies in Sydney, where the vast majority of large agencies are headquartered. The small number of participants is due to the lack of planners in most Australian agencies, which was the main trigger to conducting their study. The study's findings made evident that AP has not only been slow in making headway into the Australian market, it might not take hold at all.

As in the Scottish study, Butcher & McCulloch (2003) also found four areas under which their findings were concentrated. The first one was labeled market factors. One of the two main variables under this label was the lack of economies of scale, which prevented agencies from hiring a sufficient number of planners that would allow them to achieve high levels of specialization. The second one is a consequence of the first. Since agencies are not willing to hire enough planners and many only have them when clients request them, planners have gone into business for themselves opening consultancies. The distance an independent researcher has from the agency grants him/her more credibility in the eyes of the client.

The second is a group of factors labeled under the general term of cultural issues. The first issue was that importing British planners to work in Australian agencies created a problem of culture clash similar to that seen in the US (Lauterborn, 2008). Furthermore, the organizational culture of the agency itself and its creative and account management teams also had a negative effect on the adoption of the discipline. Unlike the British model, where the tension between these groups was conducive to creative productivity, in the Australian industry it turned into a turf battle (Butcher & McCulloch, 2003).

The third group of factors found was relating to the agency ethos category coined by Crosier et al. (2003). Butcher & McCulloch (2003) found three types of agencies, "...the imposters, the fairweathers, and the true believers" (p.477). The imposters refers to those agencies which did not truly practice or embrace AP. They either changed job titles overnight without any modification to job descriptions, or they failed to consider the true costs of implementing AP and came short once these became apparent. The second group, labeled fairweathers, did believe in the value of AP. However, having a hard time

convincing their clients of the value to this added cost, were the first to layoff planners when an economic downturn arrived. Finally, the true believers are those who have embraced it wholeheartedly. However, the researchers also found that for these agencies the lack of a pool of Australian planners is difficult when trying to implement their belief in the need for planners.

Finally, in a category that refers to the roles and responsibilities of planners within the agency, the super-planner mentioned in Crosier et al. (2003) was even pressed harder in the Australian study. (Butcher & McCulloch, 2003). Although Pollitt (2008), King (1989), and Steel (1998) all make the case for planners becoming specialized in one area, Australian planners complained of having to be generalists. Additionally, the lesser status accorded to the discipline requires them to work harder to prove their worth and keep their jobs. Finally, the lack of a local chapter of the APG in 2003 (one does exist now), made the planners who participated in the study feel despondent about the future of the discipline in the Australian industry.

Summing up the study's findings, AP had a difficult time entering the Australian advertising industry. Furthermore, the obstacles found there were similar to those encountered in the US, despite both having many cultural similarities with the UK, where the first planners came from (Butcher & McCulloch, 2003).

Account Planning in India

As a member of the BRIC group India has received its fair share of attention in recent years. With the major changes it made by deregulating sectors of its economy in the 1990s, India opened its door to globalization (Srinivasan, 2001). The consequences of this move are continuing to be felt in the country's economy.

In their forthcoming study, Patwardhan et al. (in press), look at how the advertising industry has responded by rapidly ‘glocalizing’ standard practices from more developed nations, particularly AP. Unlike the Scottish and Australian studies, (Crosier et al., 2003, Butcher & McCulloch, 2003), the Indian study had a larger pool of possible participants, yet focused on 16 professionals with diverse backgrounds and functions within the agency (account planners, account managers, and creative directors).

Following the principles of GT, the researchers organized their findings according to the themes that emerged from the in-depth, face-to-face interviews. As opposed to the four factors or areas of the previous two studies, Patwardhan et al. (in press) identified five broad themes.

The first theme was labeled ‘localized planning ethos’. The participants in this study did not seem to be confused about the origins, nature and roles of AP. In fact, they were able to present alternative terms to describe what they do; brand custodian being one of them. Additionally, and perhaps a larger parting from the previous cases, Indian planners did not seem to be as concerned with doing planning the way it is done in the UK. They believe that planning has adapted to the realities of the Indian marketplace through a process of glocalization, i.e. adapting the global to the local conditions (Patwardhan et al., in press). The actual way in which this glocalization is evident is by bringing planning in line with Indian culture, rather than expecting Indian consumers to behave as those of industrialized nations. In a further move away from British AP, Indian planners mix emotion freely with their rational analysis of consumer data, in an effort to expand their potential for creative inspiration in the development of advertising messages.

The second theme refers to the environmental factors as drivers of planning growth. It was subdivided into three interlocking categories: global marketers' organizational culture, where client satisfaction is of paramount importance; changes in consumer culture which have affected India's multicultural marketplace by the rapid pace of westernization and consumerism; and the globalization of Indian ad agencies and professionals who are expected to serve transnational clients through sophisticated business practices in an ever-changing developing marketplace (Patwardhan et al., in press).

As a clear symptom of the early stages of adoption of the discipline in India, the third theme refers to the demand-supply issues in Indian AP. In a similar fashion to what happened in other nations which also embraced planning following the British model, there is a lack of planners to fulfill the requirements of the discipline. Furthermore, the lack of a local chapter of the APG or a similar professional organization prevents planners from reaching critical mass (Patwardhan et al., in press).

The fourth theme refers to the limitation of planning roles. As had occurred elsewhere before, the advent of planners presented tension within agency's account management and creative teams opposing planners. To avoid what appeared to be turf issues, planners roles have been clearly limited to very strategic agency needs, such as important clients, pitching for new accounts, or special occasions (Patwardhan et al., in press).

Finally, the fifth theme refers to a lack of evaluation measures for AP. Although this problem has been present in other industries (Morrison & Haley, 2003), there seems to be a lack of consensus in the Indian industry as to how to fix it, or whether it needs

fixing at all. Whereas some do find it problematic that evaluation is mostly based on the opinion of the account management and creative teams' acknowledgement of a planner's contribution, others expressed their relief that as planners they were not subjected to bottom-line or creative awards types of accountability (Patwardhan et al., in press).

Following their GT findings, Patwardhan et al. (in press) tie the different themes into a working proposition of how AP has been adopted and adapted to the Indian advertising industry. According to the authors, there are two steps to the adoption process. During the first phase, named initiation, the discipline emerges as a replica of the British model since AP was brought to India in a top-down fashion by means of large transnational agencies and their clients. Having had prior knowledge of AP, the local industry quickly adopted it and slowly found what practices worked best for the local environment. Once functional, phase two should allow planners to adapt practices to the Indian marketplace, thus developing evaluation measures. As became evident in their model, and parting with the Scottish and Australian industries, the Indian industry is about to complete the process of full adoption by adapting it to their own environment as it occurred in the U.S. (Patwardhan et al., in press).

Roles and Responsibilities

The first job description for an account planner was coined at BMP in the late 1960's. According to Stanley Pollitt:

The account planner is that member of the agency's team who is the expert, through background, training, experience, and attitudes, at working with information and getting it used—not just marketing research, but all the information available to help solve a client's advertising problems. (Bendinger, 2008, p.10)

This definition was to be modified and adapted to different agencies throughout the years, but it served as the blueprint for the *intended* role of account planning. In fact, as Pollitt noted (2008), by the end of the 1970s the UK advertising industry had embraced account planning, but not without coming to terms with the contradiction that represented having someone in the agency who seemed to constantly question and second guess the work of both the account and creative teams. Historically, the account team had been responsible for keeping the interests of the client at the forefront of the advertising development process. The creative team, in turn, had been on the lookout for the agency's interests. Both King and Pollitt realized that this equation left out the most crucial element in creating effective advertising: the voice of the consumer. Thus, the account planner became the bona fide consumer advocate within the agency.

As the discipline has come of age and extended itself in most major agencies, a long series of roles and responsibilities has also fallen under the umbrella of AP. In fact, in an article written to define AP in the new millennium, Merry Baskin (2008) identified the following 16 roles.

1. Market researcher. Considering the origins of the discipline, being able to conduct or commission research is of utmost importance for an account planner. Despite its more social dimension within the advertising world, AP is still and foremost a marketing-based discipline which seeks to provide better tools when creating effective advertising.
2. Data Analyst. Having a vast amount of data available to advertisers and marketers becomes purposeless if it is not appropriately interpreted and adapted to solve the problem at hand. For this reason, account planners must be capable of understanding

- complex sets of both qualitative and quantitative data, but most importantly, of interpreting where they meet with the solution or objectives of the campaign at hand.
3. **Qualitative Focus Group Moderator.** As with most research, the out come of focus groups is only as good as the way they were conducted. It is the job of the account planner to ask the right questions in the right way, and to also get the information that participants might not want or know how to share with the research team. Furthermore, it gives more authority and credibility to a planner's voice during a strategy meeting with the account and creative teams.
 4. **Information Center.** Since the planners' job is to have the pertinent information when needed to make decisions, it is their responsibility to stay well informed about everything that might affect their consumers. In fact, planners are encouraged to stay abreast as much of popular culture as to academic and/or professional information.
 5. **Bad Cop (to account management's good cop).** Baskin refers to the need for planners to many times question the logic behind a marketing strategy or a creative idea. However, it is also important that objective fact is the basis for such behavior, since the tension between the different disciplines within the agency should lead to aiding creative output, and not to hindering it.
 6. **NPD Consultant.** In the competitive environment of consumer packaged goods, it makes financial sense to test products before their launch in order to ensure that they truly meet a consumer need, and will generate demand. Account planners are ideally suited to function as NPD consultants due to their close relationship and in-depth knowledge of consumers.
 7. **Brainstorming Facilitator.** As previously mentioned, the balance of power and

- interests within an agency's structure is full of tension. However, it is often left to the planner to balance out the field for the account management and creative teams by facilitating working in tandem.
8. Target Audience Representative/Voice of the Consumer. Out of all the functions that planners play within an agency, their role as consumer advocates is the basis of their job description. Furthermore, it is their responsibility to ensure that the consumer is a part of every step in the planning, development, execution, and evaluation of all marketing communications efforts.
 9. Soothsayer/Futurologist. In order for planners to stay abreast of what is happening not only within the discipline, but as social trends in general, it is very important that they are able to anticipate social movements and popular culture developments. Although one of the more complex roles for planners, it has spawned a discipline within itself: cool hunting. As its name evidences, it is the practice of hunting for cool—i.e., finding what is fashionable and new in consumers' lives.
 10. Media/Communications Planner. Account planning originated not only from research people, but also from media planners who were capable of finding the right media to deliver the message the account and creative teams had developed. Because of the explosion of new media, this role is becoming more central to a planner's job description, since the number and format of channels to reach consumers continues to grow exponentially.
 11. Strategic Thinker/Strategy Developer. The process of strategizing is of great importance for planners, since it sets the goals and objectives that will solve the advertising problem presented by the client. During this process, the planner works

- closely with the account management team, while keeping in mind what the creative needs will be. This prepares them to be the experts when it comes time to write the creative brief.
12. **Writer of the Creative Brief.** Out of all the roles and responsibilities that fall upon planners, writing the creative brief is the one tangible aspect of their job. However, it is a complex endeavor, since planners are expected to write a piece that will inspire creative to produce a campaign that will be effective with consumers, and will also help achieve the goals and objectives stipulated in the clients' needs.
 13. **Think Piece Polemicist.** Closely related to staying informed, planners are expected to do more with information than to simply store it. In fact, thinking creatively about what might seem as mundane affairs can lead to those moments of genius in which what is obvious has been painfully overlooked, and then discovered in a serendipitous moment by a planner.
 14. **Social Anthropologist.** In order to understand consumers' behaviors, it is important for planners to see them in their human dimension. The need to understand what motivates, moves, and makes people 'tick' is of utmost importance for planners. However, this understanding is compromised if they are incapable of viewing consumers as more than that. This enables planners to understand the difference between fashion, which is market based, and trends, which are socially based and longer lasting, thus leaving a stronger imprint in people.
 15. **Insight Miner.** Perhaps one of the most complex roles of planners. Finding insights in data, popular culture, the environment, or consumers themselves requires many skills. However, planners must be able to develop insights which aid the development of

effective campaigns rooted on reliable factual information, and never on a hunch or gut feeling.

16. Knowledge Applicator. Finally, applying knowledge refers to putting all the previous skills to use in a pragmatic fashion, with the purpose of solving the client's advertising problem by delivering the right information to consumers, in a creative and effective manner.

Although this list provides an overview of the roles and responsibilities of planners in conventional agencies of the UK and the USA, it has become clear that researchers have found that AP is adapted differently in markets around the world (Butcher & McCulloch, 2003; Crosier et al., 2003; Patwardhan et al., in press).

THE MEXICAN ADVERTISING INDUSTRY

The Mexican advertising industry has a long history of being closely tied to its American counterpart. In terms of its size, the Mexican industry is the 14th largest in the world (Barnes Reports, 2008). In regards to creativity and effectiveness, although not the powerhouse that its Argentinean counterpart has proven to be, the Mexican industry has a respectable record of awards in worldwide competitions (Sergio Lopez, President of AMAP, personal communication, March 21, 2009). Despite these factors, it has been grossly overlooked in the academic literature.

The current structure of the industry can be traced back to three major factors which combined to favor rapid growth. The first of these is the Stabilizing Development policies of the 1940s, an era during which the Mexican government determined to modernize the country after being trapped in violent revolutions for almost three decades. However, the path to achieve this was from the "inside out" (Lustig & Székely, 1997),

which required the creation of tariffs and trade barriers to protect the incipient Mexican industry. This contributed to a synergistic relationship between manufacturers, importers, retailers, and the advertising agencies charged with the promotion of goods and services (García Calderón, 2007).

Secondly, during World War II a worldwide demand for industrialized manufacturing emerged within developing economies, since most developed nations were involved in the War and thus were not producing many basic goods. The economy in the United States was greatly affected by the War efforts, and much of its production capabilities were geared toward that effect. As a consequence, many corporations decided to open subsidiaries abroad, and Mexico seemed a likely destination, not only due to its vicinity, but also because of its inexpensive labor and favorable policies. Many of these companies took along their advertising agencies (García Calderón, 2007).

Finally, the consolidation of a free market media system with minimal governmental regulations was the third factor to influence advertising's development in Mexico. Unlike most European and Latin American countries, since the early days of radio broadcasting the media system was left open to private ownership and the government followed the American system of regulating the airwaves and their content, but having no ownership or control over media companies themselves. According to Sinclair (1997):

Belated attempts by subsequent government administrations to exert some control over the content and operation of broadcasting, and when rebuffed, to develop state broadcasting institutions, have only had the effect of consolidating and legitimizing the private interests which have become Televisa, a private conglomerate which dominates every aspect of the television industry, and reaches far into other media, entertainment and communication hardware industries (p. 351).

Within this context, advertising becomes not only the major source of finance of the media system but an all-encompassing cultural activity as well (García Calderón, 2007). Presently Televisa still controls the vast media landscape in Mexico, from radio and television broadcasting to print and outdoor media. Other corporations have emerged to claim a small share of the overall market, in radio broadcasting and print media there is a more balanced participation which keeps Televisa's share at less than 50%, but in television the only true competition within the national market comes from TV Azteca. At the beginning of the decade Televisa had roughly 71% market share, with TV Azteca holding on to 26% (Ibope figures, as cited in Hughes & Lawson, 2005), which had put a significant burden on the former to stop the loss. However, it has managed to recover a greater percentage and now seems to be stable at 80% versus the latter's 20% (Sarmiento, 2009).

Within this framework, the Mexican advertising industry is structured and divided within itself in a similar fashion to its American counterpart. There are full-service agencies, which tend to be the larger ones with international clients and multimillion dollar billings; then there are the smaller agencies which are divided according to function—v.gr. creative boutiques versus media buying agencies, outdoor versus sales promotion agencies, etc. (García Calderón, 2007).

There are approximately 250 agencies nationwide, according to business directories. All major agencies are partners of AMAP, but only 71 of the 250 total are registered partners, a number that fluctuates in single digits. Member agencies consolidate over 90% of all advertising expenditures in the Mexican market (García Calderón, 2007). Amongst these, 7 of the 10 largest conglomerates are represented in the

Mexican industry. The exceptions come from all three major Japanese groups: Dentsu, Hakuhodo DY Holdings, and Asatsu-DK. Expenditure in the industry has skyrocketed in the last 20 years. In 1993 the Mexican advertising expenditure was a total of \$1.7 billion dollars (García Calderón, 2007); by 2008 it had reached \$6.9 billion and by 2009 it has been expected to go up to \$7.4 billion (Barnes Reports, 2008).

In a similar strategy to their worldwide approach, sister agencies (those held by a same larger group) compete with each other for accounts in the local market. This approach has allowed different agencies within the same group to hold accounts from the same industry that otherwise would result in a conflict of interest if served by the same agency. A small group within the powerful agencies of the national industry is formed by the local agencies that have not merged or been acquired by international conglomerates. Though few in number and market share, their structure is similar to that of the international agencies (Sergio Lopez, President of AMAP, personal communication, March 21, 2009).

Business practices within the Mexican advertising industry have not been widely documented within the academic literature. In fact, there are few mentions of the traditional areas of account management and creative in existing studies (García Calderón, 2007). This gap is covered by trade publications which contribute significantly to the discourse surrounding both innovation and recognition of successful practices. One area where this relationship is different is in consumer research.

During the greater part of the last 60 years, market research in Mexico was conducted only if necessary and in a generalized manner. In most instances major corporations followed dictates from headquarters abroad with little attention to the local

market demands. However, a shift to this approach occurred in the last 20 years during which consumer research was born in the Mexican industry aided by the success of consumer-centered approaches such as Values and LifeStyles (widely known as VALS) in the USA, and the increasingly competitive marketplace of the globalized era (García Calderón, 2007).

As a consequence of the need for a local understanding of consumers, a series of agencies expanded their research departments and independent market research agencies were opened. Amongst these, many were subsidiaries of advertising agencies who thus found a way to sell their findings to non-clients without a conflict of interest.

Though this modified the advertising industry's landscape significantly, the greatest shift came in the demands from advertisers, the last major group within the industry (García Calderón, 2007). Since most large advertisers are multinational corporations, the prevalence of consumer research in developed markets has led them to expect reliable data when allocating advertising budgets in Mexico as well. This trend has greatly influenced the Mexican industry during the last two decades and has also contributed to the adoption of the discipline of AP (Sergio Lopez, President of AMAP, personal communication, March 21, 2009).

Aside from business practices, advertisers have also shaped the way the industry operates and its impact on the marketplace as a whole. This was cemented early on as an alliance with other important players. In November 1959, a series of advertisers formed a non-profit association under the name Consejo Nacional de la Publicidad (National Advertising Council, subsequently CNP). Its purpose was to bring all advertisers together

to fund advertising campaigns that would further national interests. In the following decades CNP developed many campaigns focused primarily on social causes (García Calderón, 2007).

In October 2001, CNP changed its name to Consejo de la Comunicación (Communication Council, subsequently CC) and expanded its membership to include advertising agencies and the media. As one front, they have constituted this organization as a powerful lobby in a country which does not allow open lobbying or political participation in the form of donations from corporations. However, CC has developed campaigns to influence political campaigns, including the presidential election of 2006. The consolidation of all interests of the Mexican advertising industry under the CC has also secured the freedom to continue self-regulating while maintaining a collegial relationship of its members, despite its highly competitive nature (García Calderón, 2007). Within this context the Mexican industry is in a transitional phase, still adapting to the pressures of a globalized economy in a legal framework of little governmental regulation but growing at an accelerated speed.

ORGANIZATIONAL CULTURE

The study of culture within organizations has received growing attention from scholars across different disciplines. Though many are the reasons behind this, the need to determine what defines an organization and its members seems to be an underlying theme in organizational culture research. According to Schein (1990):

Culture can now be defined as (a) a pattern of basic assumptions, (b) invented, discovered, or developed by a given group, (c) as it learns to cope with its problems of external adaptation and internal integration, (d) that has worked well enough to be considered valid and, therefore (e) is to

be taught to new members as the (f) correct way to perceive, think, and feel in relation to those problems (p. 111).

Organizational culture is a complex construct which has a recent history that is not yet complete (Schein, 1990). During the last 30 years, the growth of multinational corporations in a globalized era of worldwide capitalism put the focus on human interactions within organizations. This is partly due to the increasing reliance of developed markets on cheap labor and rising economies of developing nations. Organizations and scholars have worked hard at finding ways to optimize relationships across cultures, thus contributing to the growth of this school of thought (Eisenberg & Goodal, 2004).

Currently, the field of organizational culture has developed different perspectives of inquiry. Smircich (1983) identified five schools of thought with a clear distinction in the way culture is conceived, as well as how each intersects with organizational theory research. In her seminal study, she identified the major studies being done in her field and grouped them in order to give coherence to the body of works that was shapeless until then.

Deshpande & Webster (1989) went further and organized research in organizational culture and marketing along five distinct paradigms. The first of these is comparative management, which views culture as “some ‘thing’ imported into organizations through the national, regional, and ethnic affiliations of employees.” (Eisenberg & Goodal, 2004; p.130).

Amongst the many scholars who have subscribed to this view of organizational culture, Grete Hofstede stands out. His studies conducted with the employees of IBM in 50 different countries all around the world found that the company’s own culture was

adapted in each different geographic location, in a way that was reflective of their national culture (Hofstede, 1983a, 1983b). Though Hofstede's contributions to the field have been considerable and have put the issue of culture at the forefront of research in many disciplines, they have failed to provide the necessary tools to study the internal variation within markets themselves. This is problematic because it consequently takes a deterministic look that fails to take into account the fluid nature of culture as something which is alive and in constant change because the people who form them change constantly as well (Eisenberg & Goodal, 2004).

The second field identified by Deshpande & Webster (1989) is labeled contingency management. Though it also views culture as an independent variable, unlike comparative management it does not view culture as something that exists independent of the organization. In fact the authors expand Smircich's (1983) notion that this perspective is traditionally functionalist and as such, views the basic elements of culture as building blocks that turn individuals into cultural groups.

...cultural artifacts, and even the art of management itself, are powerful symbolic means of communication. They can be used to build organizational commitment, convey a philosophy of management, rationalize and legitimate (*sic*) activity, motivate personnel, and facilitate socialization (Smircich, 1983, p. 345).

Though these two paradigms have proven very prolific in the academic literature, they also have detractors. One of the biggest criticisms of both is their overlooking the fluid nature of culture, with subcultures, or even countercultures, competing to be the dominant discourse that will define organizations and/or their members (Deshpande & Webster, 1989).

The third paradigm identified was labeled organizational cognition (Smircich, 1983; Deshpande & Webster, 1989). First developed by Weick (1979), as its name indicates, it focuses on cognitions of the subjects being studied.

In the organizational cognition perspective on organizational culture, the task of the researcher is to understand what the "rules" are that guide behavior—the shared cognitions, systems of values and beliefs, the unique ways in which organization members perceive and organize their world (Deshpande & Webster, 1989, p. 7).

This paradigm's focus on actions and patterns as the building blocks of shared culture make it an ideal framework of reference to study practices within organizations (Weick, 1985).

The fourth paradigm is called organizational symbolism, and is used extensively in ethnographic research. Its emphasis on the symbols to derive meaning that will indicate courses of actions for organizations' members is well documented in the literature (Smircich, 1983). Whereas in the previous perspective culture is seen as a metaphor for shared knowledge—i.e., cognitions—in this school of thought it becomes a metaphor for the meaning behind symbols (Deshpande & Webster, 1989). Since this perspective is strongly grounded in anthropological theory, values, attitudes, and belief systems take front stage with actions as units of analysis in the research process, in detriment of the organization as a whole. Furthermore, as Smircich (1983) states:

With this orientation, the very concept of organization is problematic, for the researcher seeks to examine the basic processes by which groups of people come to share interpretations and meanings for experience that allow the possibility of organized activity. The research agenda here is to document the creation and maintenance of organization through symbolic action (p. 351).

The fifth and final paradigm presented by Smircich (1983) and Deshpande & Webster (1989) is labeled structural/psychodynamic perspective. Grounded in

structuralism, it views culture as a metaphor for the unconscious mind, or as Smircich (1983) states, “organizational forms and practices are understood as projections of unconscious processes and are analyzed with reference to the dynamic inter-play between out-of-awareness processes and their conscious manifestation” (p. 351).

Researchers in this tradition view organizations as expressions of the unconscious mind, rather than objective, goal-oriented systems. For this reason, there is less scholarly activity within this framework, and much of what is done is greatly influenced by the structuralist work of Levi-Strauss (Smircich, 1983).

Though research in the area of organizational communication has been very rich, its focus on practices within the advertising industry is not very extensive. Furthermore, Diffusion of Innovations Theory (Rogers, 1962), having originated within the field of communication, has been utilized in studies of adoption and diffusion of practices, perhaps due to its proximity as a discipline.

However, studies with different theoretical frameworks of reference have informed the field in recent years. For example, West and Ford (2004) studied the role that agency philosophy had on employee risk taking and they found that the effect is such, that it pervades the whole agency. In fact, agency philosophy (which is rooted in its culture), was a deterministic factor in client agency relationships. Their study reinforced a move within the discipline to focus on the impact that agency philosophy, or corporate culture has on practices (Butcher & McCulloch, 2003; Crosier et al., 2003; Patwardhan et al., in press).

For the purpose of this study, the third paradigm described by Smircich (1983) and Deshpande & Webster (1989), cultural cognition, has been deemed best fit and will be expanded on in the discussion of results (p.

RESEARCH PURPOSE

The central purpose of this study is to provide a detailed account and analysis of how AP is perceived by those responsible for planning in the Mexican advertising industry, from the process of adoption to that of roles and responsibilities of account planners. The importance of this study is extended into several areas.

First, tracing the emergence of the adoption process of AP by the Mexican industry will contribute to the overall theory formation of the role AP plays in the development of advertising strategy. Secondly, if there is a systematic process of adoption, this study will also provide a benchmark for future comparative studies with other markets or nations. Finally, a direct exploration of the elements in the adoption of AP that are unique to the Mexican industry will contribute to the literature on globalization of business practices, as well as the way they are “glocalized” to respond to the needs of specific cultural realities (Kraidy, 1999).

Research Questions

The expansion of advertising conglomerates into developing nations in the last 30 years has had a profound impact on local industries. This change has not occurred solely at the level of market share and profit structures. It also means that the way advertising is planned, developed, created, executed and evaluated has become a reflection of the systematized business models under which most corporations have expanded (Leslie, 1995; Ghoshal & Westney, 2005). However, the literature also suggests that host nations

are not passive recipients of business practices imported from abroad. In fact, most of the time a process of “glocalization” occurs, and adopted practices adapt to the realities of the local market (Kraidy, 1999).

In the case of AP within the Mexican advertising industry and considering the complexity of understanding and reporting on this phenomenon from a scientific perspective in an area lacking previous work, GT has been selected as the best methodology to explore this problem. In the absence of any preconceived notions about this phenomenon at the moment of developing this research project, the following questions will inform and direct the study:

- a) What do Mexican planners consider AP to be, and what are its roles, both perceived and real?
- b) How is AP put into practice in the Mexican advertising industry? How is it evaluated, and when is it considered effective?
- c) What are the present limitations and future outlook of AP in the Mexican advertising industry?

CHAPTER 3: METHODOLOGY AND RESEARCH DESIGN

GROUNDING THEORY

The lack of literature regarding the process of adoption of AP around the world complicated the process of finding the right methodology to carry out this study. However, the nature of the questions being asked made this study ideally suited for a qualitative approach. From the list of possible options, GT was the best fit. Furthermore, the only study (Patwardhan et al., in press) of AP adoption that was conducted under rigorous theoretical constructs used GT. For these reasons and the following detailed explanation of the methodology, it was chosen to frame this study.

The last few decades have seen a paradigmatic shift in the way researchers find answers to the questions that interest them. Prior to this change the focus of many social scientists had been on testing hypotheses for verification of theoretical constructs, while the task of developing theory in itself had been left in the hands of few researchers. Although positivism had been greatly responsible for the emphasis of social scientists on verification, this situation was detrimental to the furthering of many social sciences (Glaser & Strauss, 1967). The need for theories was exemplified in the need to have a conceptual framework that would enable researchers to test within a contained environment, even if it was far removed from what occurred in the real world.

In the field of sociology this was especially felt, since researchers who gathered data from the field often had no theory to help them interpret it. Within this context Glaser & Strauss developed the framework for GT, which "...in contrast to theory obtained by logico-deductive methods, is theory grounded in data which have been systematically obtained through 'social' research" (Goulding, 2002, p. 41).

During the early stages of conceptualization of GT, Glaser and Strauss (1967) identified two types of theories derived by their methodology. The first type of theory was substantive theory. Substantive theories are those that explain only the phenomenon under observation in the data being analyzed. Researchers cannot generalize the findings of a substantive theory. The second theory, named a formal theory, allows researchers to explain, and sometimes predict, phenomena outside their observations. From this principle, both researchers developed GT further, but in different directions. Whereas Strauss advocated a more formal and systematic approach to theory building for researchers, Glaser warned against 'forcing' data to fit preconceived notions, which according to him went against the purpose of GT. Following a bitter discussion about these differences, the researchers parted ways and never worked together again (Glaser, 1992; Goulding, 2002).

As GT has become an accepted research methodology within and out of sociology, it has become increasingly systematic. In fact, GT research today spans most disciplines in the social sciences and it informs studies where no theoretical framework has yet been developed. According to Morse (as cited in Goulding, 2002), a GT is:

...a theory [which] provides the best comprehensive, coherent and simplest model for linking diverse and unrelated facts in a useful and pragmatic way. It is a way of revealing the obvious, the implicit, the unrecognized and the unknown. Theorizing is the process of constructing alternative explanations until a 'best fit' that explains the data most simply is obtained. (p.45)

Although primarily used by qualitative researchers, GT has both canons and procedures which can be systematically evaluated as strictly as those used with purely quantitative methods. Through these means, a researcher can be rigorous enough as to

provide the measures of significance, theory-observation compatibility, generalizability, consistency, reproducibility, precision and verification (Corbin & Strauss, 1990).

Corbin and Strauss (1990) warn against appearing unduly formal, but suggest that in order to provide the necessary rigor GT must adhere to the following canons.

1. Data Collection and Analysis Are Interrelated Processes. These two cannot be divided, for they inform and guide each other. As data is collected, it should be analyzed to ensure that the process of discovery grounds the theory in reality (Glaser & Strauss, 1967).

2. Concepts Are the Basic Unit of Analysis. Qualitative data which are not conceptualized are limited to being nothing but a series of anecdotes. It is necessary to move the data beyond its raw state to one where constructs and concepts emerge to tell the greater story of their interrelationships (Corbin & Strauss, 1990).

3. Categories Must Be Developed and Related. Categories are groups of closely interrelated or similar concepts, and as such, are at a higher level of importance in constructing a theory to explain the phenomenon under study. Not all concepts become categories, since these become the building blocks of theory (Glaser & Strauss, 1967).

4. Sampling in GT Proceeds on Theoretical Grounds. The concept of randomization so ingrained in quantitative methodologies is not purposive in GT. In fact, since the intention of following a GT methodology is to generate a new theory grounded in reality where none exists, sampling must reflect this. Although researchers employing GT should not initiate their research with a clear explanation for the phenomenon they are studying, they should have an idea of where to ask the questions that will give them that information (Creswell, 2007).

5. Analysis Makes Use of Constant Comparisons. The way in which categories emerge is by comparison of units of analysis. Additionally, it reduces bias by allowing the data to “tell their own story” rather than fitting the notions of the researcher (Creswell, 2007; Corbin & Strauss, 1990).
6. Patterns and Variations Must be Accounted For. The difference between pattern and variation can substantially modify a theory. If behavior which is expected differs when the subjects experience certain types of stress, this should be noted as a modifying construct to the theory. This in turn allows the GT to become richer thus increasing its generalizability (Corbin & Strauss, 1990).
7. Process Must Be Built Into the Theory. The concept of process is not only applicable to the actual methodological development of the GT, but to the actual phenomenon under observation as well. In order for a theory to work, it must explain the process by which interrelated concepts play out in the real world. (Corbin & Strauss, 1990).
8. Writing Theoretical Memos Is an Integral Part of Doing GT. Being systematic in the process of gathering and analyzing data is necessary to avoid losing conceptual detail. The most efficient way to avoid this problem is by keeping a close account of all activities. This process also helps reduce unconscious bias due to recalling only those things which confirm the previously held notions of the researcher. (Corbin and Strauss, 1990).
9. Hypotheses About Relationships among Categories Should Be Developed and Verified as Much as Possible during the Research Process. A process known as axial coding (see p. 42), which takes the results of analyzed data as a point to go out back into the field is of fundamental importance for GT. This process informs the researcher as to where to go

to continue getting relevant information until there is saturation—i.e., until there is no new information (Corbin & Strauss, 1990; Creswell, 2007).

10. A Grounded Theorist Need Not Work Alone. This is an important consideration that enables an early stage of peer reviewing and a reduction of possible bias on behalf of the researcher (Corbin and Strauss, 1990).

11. Broader Structural Conditions Must be Analyzed, However Microscopic the Research. Analyzing a certain phenomenon within its own context, without any consideration for its broader implications is detrimental to the further growth of any discipline. One of the most important constructs under which GT emerged was its potential to provide a theoretical explanation to data derived from the “real world”. Failing to consider the implications that a study has on broader sartorial conditions defeats the purpose of conducting research (Corbin & Strauss, 1990).

To provide further guidance, Corbin and Strauss (1990) give a detailed explanation of coding procedures for GT. Three different types are identified, open coding, axial coding, and selective coding. It is important to note that the same study might include all three types of coding, depending on the stage of data gathering and analysis the researcher is in.

Open coding is the simplest of the three and refers to analytically breaking down the data gathered. It is best suited for the early stages of the research project, for pilot studies or those for which there is no preexisting knowledge or expectations on the part of the researcher. After comparing the units of analysis for similarities or differences, they are given conceptual labels and grouped into categories and subcategories. Since going back into the field is necessary in most uses of GT, open coding guides the

researchers in developing comparative questions when gathering more data, as well as providing the basis for sampling on theoretical grounds (Corbin & Strauss, 1990).

Axial coding would be the second type of coding, and it refers to the process by which “categories are related to their subcategories, and the relationships tested against data. Also, further development of categories takes place and one continues to look for indication of them” (Corbin & Strauss, 1990, p. 13). When performing axial coding, any deductive hypotheses about the interactions of data must be tentative solely, since the process of analyzing the data might show gaps in the theory being developed.

Additionally, although GT is primarily qualitative in nature, it is necessary when coding to take variation into account before viewing single isolated incidents as the basis to discard or verify theoretical constructs (Corbin & Strauss, 1990; Creswell, 2007).

The third and final type of coding, selective coding, “is the process by which *all* categories are unified around a ‘core’ category, and categories that need further explication are filled-in with descriptive detail” (Corbin & Strauss, 1990, p. 14). Typically done at the end stage of a study, it allows the researcher to put it all together under one unifying theory that will explain the phenomenon under study. However, it is important to clarify that finding the one notion around which the theory must be developed is not always an easy task. It takes a great deal of detailed analysis and explication of *all* the concepts and categories which emerged from the data.

The purpose of GT is to provide a theory where there is none to account for the relationships seen when systematically analyzing real world data. Oftentimes, this requires the capacity to think in very abstract terms, since the higher the abstraction the higher the generalizability of the theory. Furthermore, a GT can be reproducible if it is

verifiable. The only way to ensure that this occurs is by being consistent and precise in the stages of data analysis. Coding, as described earlier is done in three stages with the purpose of allowing researchers to slowly discover the core categories which emerge naturally from within the data. When in doubt, it also allows researchers to go back to the field to clarify the issues under question (Corbin & Strauss, 1990; Creswell, 2007).

Finally, as mentioned earlier, there is a set of criteria to evaluate GT. These can be used to evaluate the research process and to evaluate the empirical grounding of theoretical findings. For the first type, the following questions should be answered:

Criterion #1: How was the original sample selected? On what grounds (selective sampling)?

Criterion #2: What major categories emerged?

Criterion #3: What were some of the events, incidents, actions, and so on that indicated some of these major categories?

Criterion #4: On the basis of what categories did theoretical sampling proceed? That is, how did theoretical formulations guide some of the data collection? After the theoretical sample was carried out, how representative did these categories prove to be?

Criterion #5: What were some of the hypotheses pertaining to relations among categories? On what grounds were they formulated and tested?

Criterion #6: Were there instances when hypotheses did not hold up against what was actually seen? How were the discrepancies accounted for? How did they affect the hypotheses?

Criterion #7: How and why was the core category selected? Was the selection sudden or gradual, difficult or easy? On what grounds were the final analytic decisions made? How

did extensive “explanatory power” in relation to the phenomena under study and “relevance” as discussed earlier figure in the decisions? (Corbin & Strauss, 1990, p.17)

Although some of these criteria are unconventional from a quantitative perspective, it is necessary to sustain a systematic approach to data gathering and analyzing in order for GT to provide the rigor required from other methodologies. When considering the empirical grounding of the findings, there also the following seven criteria to consider:

Criterion #1: Are concepts generated?

Criterion #2: Are the concepts systematically related?

Criterion #3: Are there many conceptual linkages and are the categories well developed?

Do the categories have conceptual density?

Criterion #4: Is there much variation built into the theory?

Criterion #5: Are the broader conditions that affect the phenomenon under study built into its explanation?

Criterion #6: Has “process” been taken into account?

Criterion #7: Do the theoretical findings seem significant and to what extent? (Corbin & Strauss, 1990, pp. 17-20)

Although these criteria are intended to be comprehensive, Corbin and Strauss (1990) warn against viewing them as set rules. They are more of a guideline for the researcher reporting on findings, and for the reader of GT research to ask him/herself the proper questions when evaluating a study.

STUDY DESIGN AND METHOD

Research Paradigm

The nature and structure of the research questions that inform this study demand the use of a qualitative methodology, as has been explained in the previous section. Since qualitative research is inductive by nature, the researcher must infer many of the concepts that arise from the data when constructing a theoretically sound explanation. This means first, that the researcher plays an active role in determining where to find answers to the questions that inform the study; and second, considering the purpose of the study is rooted in the need to understand and interpret the phenomena at hand, objectivist assumptions do not apply as they would in a quantitative project (Lindlof, 1995; Ritchie & Lewis, 2003).

In quantitative studies the concept of validity and reliability are of great importance because the soundness of the study is evaluated according to these constructs (Merriam, S.B., 2009). Validity refers to whether the study is measuring the right thing, and reliability on whether it is measuring it the right way. Furthermore, the measure of validity can be internal or external, referring to the soundness of the instrument and the sampling, respectively. However, according to Lindlof (1995), these issues should be considered differently when using interpretive/qualitative methodologies:

The interpretive paradigm recognizes the constantly changing character of cultures, perceptions and forms of action. Because what can be observed of a scene is profoundly contingent on time, and on the individual human-as-research-instrument (whose properties change as time in the field increases), little is gained from trying to achieve reliability. Applying the concept of validity to qualitative inquiry is also difficult. A world consisting of multiple, constructed realities does not permit the researcher to identify any single representation as the criterion for accurate measurement. And because the inquirer operates reflexively as a

participant, it is doubtful whether the usual way of conceiving internal validity has much relevance. Finally, the qualitative researcher studies social action and cultural sensibility situated in time and place; the move to generalize in the traditional sense is neither warranted nor particularly desirable (p. 238).

This does not necessarily mean that qualitative research does not employ rigorous methods. It simply means that the focus and objective is different due to the nature of the research questions informing the study (Merriam, 2009). Considering that this study was exploratory in nature, the methodological considerations were more focused on developing the instrument and on purposeful sampling, which will be elaborated in the following sections.

Interviews

Face-to-face, in-depth interviews were selected as the most appropriate method for the study. According to McCracken (1988), “[t]he long interview is one of the most powerful methods in the qualitative armory” (p. 9). Furthermore, interviews have proven to be extraordinarily useful when exploring new areas by providing richer data than other methods could yield. The ontological difference between a survey and an interview is rooted in these considerations (Kvale, 2009).

There are many issues to consider when using interviews. An important one to understand is the role that the researcher plays as instrument (McCracken, 1988; Kvale, 2009). This construct is relevant because the focus of qualitative research is not to achieve objectivity in a positivistic sense. More importantly, it is necessary to understand the subjective component that researchers bring with them when they are themselves an instrument of their own research. Being able to understand these limitations enables the

researcher to account for them and thus, explain the impact they might have in the end product, without compromising its worth (Kvale, 2009).

Another issue refers to the logistics of conducting the interviews. For inexperienced researchers, establishing trust and being able to ask the questions the right way, which will result in the richest data possible, is many times a daunting task. Furthermore, even for more seasoned researchers, interviewing subjects is a craft that does not come easily or naturally to most (McCracken, 1988; Kvale, 2009). However, controlling as many peripheral variables as possible enables the researcher and interviewee to focus on the conversation rather than on distracters. It is therefore important to consider place, time, weather conditions, level of familiarity, among other circumstances when planning and executing interviews. One unattended variable and the results can be compromised (Ritchie & Lewis, 2003).

It is necessary to understand the purpose of interviews is to get participants' opinions, perspectives, beliefs and/or perceptions, and not necessarily facts, which can be better retrieved through survey methods. The central premise of a good long interview is that it should be both flexible and interactive (McCracken, 1988; Ritchie & Lewis, 2003).

Due to the characteristics of interviews in qualitative research, having a large sample size becomes less important than having interviewees go deeply into the issue at hand. Consequently, interviews do not rely solely on strict questionnaires. In fact, due to their flexible nature, probes and prompts become more important (Kvale, 2009; Ritchie & Lewis, 2003). Probes refer to questions for clarification based specifically on what the

interviewee has already stated. Prompts come from the researcher's own thought process as triggered by the interviewee's responses (Ritchie & Lewis, 2003).

The Questionnaire

The questionnaire was primarily developed from the research questions informing the study. However, also incorporated was an overview of the questions asked in the studies conducted previously in other countries (Butcher & McCulloch, 2003; Crosier et al., 2003; Patwardhan et al., in press). The original questionnaire was tweaked to reduce the appearance of AP-centric bias, and the resulting instrument asked more varied questions to enhance the study.

The final questionnaire used 10 open-ended semi-structured questions to guide the discussion, and as previously mentioned, was developed in both English and Spanish languages (Appendices A & B). However, considering the nature of the research questions, the questionnaire and its subsets were used more as probes as the conversation evolved. The participants were allowed to guide the discussion in the direction that best fit their own experiences, and clarification was only requested when what was said was not sufficiently clear to the researcher. According to Creswell (2007), using a flexible semi-structured questionnaire in terms of questions and probes allows researchers to adapt to the realities of the interview without compromising the validity of the study.

Additionally, as previously mentioned the questionnaire was developed in both English and Spanish and as such was presented to the participants. This allowed the respondents to engage in code-switching comfortably, since this a highly stigmatized practice amongst Spanish-English bilinguals (Montes-Alcalá, 2000). This also enabled greater candidness, since many were at a loss for words when speaking advertising jargon

that does not have an exact translation into Spanish, or simply felt more comfortable speaking in English altogether.

Sampling and Recruitment

Most of the sampling techniques used in qualitative research do not follow a pattern of randomization or probability analysis. In fact, part of the research process requires the researcher to ask the questions of where can subjects who hold the answers to the research question be found (Lindlof, 1995). The sampling method used in this study is known as purposeful sampling, and it is extensively used in qualitative studies.

According to Patton (1990):

Qualitative inquiry typically focuses in depth on relatively small samples, even single cases (n=1), selected *purposefully*. [...] The logic and power of purposeful sampling lies in selecting *information-rich cases* for study in depth. Information-rich cases are those from which one can learn a great deal about issues of central importance to the purpose of the research, thus the term *purposeful* sampling. (Emphasis in original, p. 169).

Additional to purposeful sampling, another strategy which is relevant to this study is snowball sampling. As its name indicates, the purpose of this strategy is to rely on subjects to refer or guide the researcher toward other participants who might be of relevance to the research question.

Ultimately, the sampling strategy can follow many varied paths, but in the end it will be directly related to the success of the study since it will be dependent on the relevance of participants to the research questions posed by the study (Creswell, 2007; Lindlof, 1995; Merriam, 2009).

Qualitative research does not seek to isolate phenomena, or control variables in order to measure and predict future outcomes. However, the importance of “rigor,

systematicity, and value in qualitative research also depend on how analysts enter into perspectives of the scenes they study” (Lindlof, 1995, p.131). Thus the relevance of establishing a solid sampling strategy, informed by the research questions and the type of respondents needed to answer them.

THE STUDY

Having deemed that a qualitative approach would be the best option to carry out this study, it was carried out in Mexico, where semi-structured, in-depth, face-to-face interviews were conducted with account planners working for advertising agencies which are members of AMAP, or to ensure a variety of voices, with professionals responsible for the functions associated with AP in agencies that did not have a department as such.

At the time this study was conducted, AMAP did not have information on the exact number of planners working in the Mexican industry, or of agencies who actually employ them (Sergio Lopez, President of AMAP, personal communication, March 21, 2009). Therefore contact was established with those agencies which are known to use AP, and when exhausted, through a strategy of snowball sampling, to those agencies which do not report to AMAP as having planners. Considering how small the pool of participants would have been if only those with a structured AP department within an agency were to participate, it became crucially important to ask the participants to refer planners or strategists who work as consultants or under other job titles.

In a period of two weeks during July of 2009, a total of 18 advertising professionals, all of them involved in one or another with the functions of AP within their respective agencies (including freelance planners) participated in the study. These participants were from varied backgrounds, in terms of place of origin (eight foreigners);

place and field of education (ten educated primarily abroad in disciplines ranging from business and advertising to psychology, law, and music composition); age, gender and years of experience within the industry. Though the nature of the research questions and methodology do not need randomization or representativeness, this appears to be a reflection of what the discipline is like in the Mexican industry. (For a detailed list of participants' characteristics, view Appendix C).

In-depth interviews which lasted from 45 minutes to one and a half hours were conducted, in both English- and Spanish-language depending on what suited the interviewee best. It is worth noting that as mentioned previously many of the planners who work in the Mexican industry are foreigners, trained abroad (Sergio Lopez, President of AMAP, personal communication, March 21, 2009). This became evident in the choice of words and metaphors used to convey ideas that seemed too abstract or discipline-centered to rely on standard colloquial language. The interviews were conducted wherever the respondents felt more comfortable. Six agreed to meet in public places, mostly cafes, and the rest of the interviews took place in their offices.

During the actual interview, the nature and purpose of the study was thoroughly explained. It was presented as a doctoral dissertation project with the purpose of mapping the discipline of AP within the Mexican advertising industry. Knowing the purpose of the study contributed to a richer interview since many respondents stated that thinking of their jobs in conceptual terms was something they had never had the luxury of doing. Furthermore, the promise that what they said was entirely confidential and no identifiers (agencies or clients) would be named in the study allowed them to feel relaxed and

secure. During the interviews, when it was deemed that translations would be necessary, probes for further clarification to avoid misinterpretation were done.

All interviews were recorded with a digital voice recorder and then transferred in digital format to an external drive and a computer hard-drive. Subsequently, they were transcribed. Once the transcription was finished, the categories were arranged under different themes as they emerged using the constant-comparative method (Creswell, 2007; Lindlof, 1995). When the data had been arranged, respondents were e-mailed for clarification when needed. This was done as a member check, since going back into the field was not logistically feasible. However, the response was positive in all but one case. Through the use of GT, the initial themes that emerged were grouped into core categories and then aligned within a theoretical framework from other disciplines when needed.

Though saturation was achieved within the responses of participants, it is necessary to disclose that triangulation of methods or members was not done due to the specificity of the research question and the logistic complications derived from conducting the study in a foreign nation. These considerations will be further elaborated in the subsequent areas of this study.

CHAPTER 4: RESULTS

As has been discussed in the previous chapters, the purpose of this study is to provide a theoretical framework of the adoption of AP in the Mexican industry. The lack of literature regarding this in particular and the Mexican industry in general has proven to complicate the conceptualization of the study. However, a theory grounded on the actual experiences of professionals working in the field was deemed the best course of action. Throughout the research process the need for a systematic approach in data gathering was one of my main concerns. I therefore kept note of the major decisions and steps taken. However, these have been used mostly to ensure that the collection followed specified procedures. The data presented here pertains solely to the interviews conducted and not to the notes taken for the purpose of adhering to the methodology.

The research questions informing this study were divided into three subsets, I will proceed to present the findings that are relevant to the research questions and the corresponding literature, first, and discuss them individually in the subsequent pages. All names have been changed to protect the identity of the participants.

- a) What do Mexican planners consider AP to be, and what are its roles, both perceived and real?

There is a rather diffused consensus that it is early in the stage of the discipline in the local market to be as clearly defined as it is in the British or American industries. Consequently, the roles taken by planners will depend on the expectations that both the agency and the client have of their work. As David states, “There are as many definitions of AP as there are ways of practicing it”.

- b) How is AP put into practice in the Mexican advertising industry? How is it evaluated, and when is it considered effective?

Participants were clear that AP does not exist outside an agency's ethos—i.e. AP is defined by the agency's corporate culture, more than by the discipline itself. There is no clear evaluation or measure of performance, and in the overwhelming majority of agencies, the only feedback a planner receives comes from winning an account or being thanked directly by the client.

- c) What are the present limitations and future outlook of AP in the Mexican advertising industry?

The greatest limitation for AP in Mexico is the lack of consensus on what it is, and the lack of commitment to it from agencies and clients alike. However, planners feel confident that if they organize themselves to start an APG chapter—as they were doing when these interviews were conducted—their chances will improve significantly as they educate industry insiders about their contributions to the overall process.

Additional to these questions, a series of underlying issues arose from the interviews. One of these was how negatively many planners perceived the present situation of their discipline, and yet how hopeful they felt about its future outlook. This of course could have been the simple cathartic effects of talking to a stranger about work conditions, but many of the responses were tinted of negativity and certain bitterness in regards to the place they occupy in the overall industry.

Following is a discussion of the findings, grouped in four major themes that emerged from the data. The first is the conceptualization of AP, which addresses the

overall state of affairs of the discipline within each agency's departmental structure, and in the industry as a whole. The second theme refers to the roles and responsibilities that planners perceive define their discipline. The third theme focuses on measurement, evaluation and effectiveness of AP. Finally, the fourth category looks at the current obstacles and the future outlook of planners in regards to their field. This discussion will be enriched through illustrative quotations from the participants' experiences, taken verbatim from the interview transcripts.

The Conceptualization of AP

The most important finding that this study yielded is the lack of clarity and consensus in the conceptualization of AP. Most respondents stated that there is little understanding about AP in general. This is common not only amongst clients, but many times within the agency itself. The frustration this brings upon is a source of stress and unnecessary conflict, but most planners do not place the blame on one person or department.

This lack of understanding of AP is due to the lack of clarity in agencies themselves. In some places AP is research, in others it is strategic planning, and in some others, it is an aid to creative when pitching for new accounts... This causes confusion which leaves a gap between expectations and what you deliver to clients, especially because we are used when pitching for new business. The agency promises a client that they have something special that will give them a competitive advantage so they expect a miracle instead of strategic planning behind a campaign. (Adam)

There is not a clear conceptualization of AP in clients' minds about AP because the Mexican industry is not as homogenous as those of the UK, US, Argentina or Brazil. Multinational corporations also contribute to this, since many are aware of AP from previous exposure abroad, but others don't have this experience and contribute to the confusion. There is no clear concept, sometimes even within the agency. (Scott)

The lack of clarity is considered one of the largest obstacles the discipline must overcome. This becomes problematic not just for AP departments, but for agencies without a planning department as well. AP has become the buzz word amongst many industry insiders, regardless of whether they understand what it really is. Many clients will ask the agencies who do not have an independent area devoted to the discipline about their planning departments, because “everybody else” has them. This is clearly putting pressure on agencies to jump on the AP bandwagon, whether they are capable or not; in the best of cases, some agencies are able to do planning, even if they lack a department or staff dedicated solely to the discipline, but in the majority AP is diluted into a watered down research department that does things as usual but labels them AP.

The proliferation of AP as an independent agency function has hurt us significantly, but we do it at all time without regard to the existence of a department. People perceive us as weak because they think that our agency is lacking, so they ask us “Where is your strategy department?”, and I have to say “It’s us”... This causes an awkward silence, but we do everything. We go to their [the client’s] research projects, to their presentations from other [marketing communications] agencies, and we are heavily involved. This proves to them that we develop the strategy thoroughly, regardless of the name of our department. But yes, clients do request an expert in strategic planning, this is perceived as a weakness, but our strength is that we still deliver. (Dee)

Some of the participants do not have the title of account planner themselves, since their agencies do not have a planning department. However, they felt that when they did functions of planning other departments felt confused and sometimes even territorial.

This was explained by an account executive at a large agency.

I started at another agency where we did have planning, and there the planner was... She was always pushing me—I was in accounts—to develop strategy. So now that I am here and I do strategy for my clients they appreciate it, and even the creatives thank me, but other people in accounts feel I’m doing more than I should be doing and that it can hurt the chemistry balance of the entire agency! (Kate)

When asked what was being done to better educate people about AP, the standard response was that they do teach whomever they come in contact with, but that they can only do so much. Additionally, some argued that they are busy enough as it is with the day-to-day operations as to still take time to do what they believe wouldn't be necessary if AMAP or APG were filling this void. At this point there is no unified consensus as to how overcome this problem, though a few have taken matters in their own hands.

The best way to educate people about planning is with deeds, not words. I am not going to give anybody a lecture on AP, or a 7 page paper on Pollitt and King on what planning is, so I prefer to get to work and have them see what AP is. But this is not only from clients, also accounts and creative. You would expect to have zero ignorance within the agency, but it's still there... Planners, we have to develop our own map. That's what we are doing a bit with APG. If we are strategists, and we have to develop paths to solve problems, to overcome barriers, how is it possible that we have not yet found the path to sell ourselves?! That's the work that's needed. But the fact that it's not defined... There's no stereotype for planners. There's a stereotype for creatives, you know crazy, tattooed, it's just a stereotype but it exists. Creatives should be crazy, and way out there, and party animals, and super alternative. You can't imagine a creative with a tie and glasses... You picture accounts people as more businesslike, but there is no stereotype for planners. It could be the philosopher or super nerd, but it's still not defined... (Sandra)

Another participant stated that perhaps the adoption of AP in a top-down fashion is what contributes more to the confusion. One agency which pioneered the inclusion of AP in Mexico exemplified this best. The agency had had three different planning directors in recent years, all from different countries and with different conceptions of what AP should be. Since the agency had not created a model of AP for itself as a response to an internal need, every time a new person arrived the department and its functions were totally redesigned to accommodate the then pressing needs of the agency.

This created frustration and confusion amongst the planners who had been through all these changes, and conflict with the people from other departments within the agency.

The problem in my agency is that AP has been through an existential crisis. We've had new management in the department and creatives believe we complicate the process, that we should be more pragmatic, not think so much. (Robbie)

Another agency was going through an internal shift in its corporate identity and the planner said: "I cannot tell you at this moment what AP is in this agency, call me in three months!" (Mary)

But the reality of conceptualizing AP in a manner that would be accepted throughout the industry is problematic mainly due to the following reason. Each agency interprets and conducts AP according to its own corporate culture. When asked why it is so difficult to define what AP is, Jack provided an answer that summed up the argument of the overwhelming majority of respondents.

AP is new in Mexico and many people have differing views. Here we are into creative and planners focus on that because we believe that the creative department has lost that strategic vision, and accounts is too busy with the day-to-day... In theory [AP] works well, but in reality each agency will adapt to itself, it will fill in the void... (sighs and pauses)... [AP] provides a diagnosis of the business or brand and provides a possible solution to that by bridging the insights and strategic vision to the needs of the client! (Jack)

This characteristic did not vary much. In the vast majority of cases the AP department would affiliate itself to either the account management or creative departments, depending on the agency's *ethos*. Mary had worked for clients many years before joining an agency which is well-known for its eagerness to please clients, and she brought that philosophy with her "We work closely with accounts so we can keep the client's needs satisfied, and once we are done we incorporate the creative team." She also

believed that viewing the entire process from the perspective of an account executive she became more empathetic to the rest of the agency's staff, and this is reflected in the expectations that she and her agency have of her work.

But this was not a common occurrence. In fact, a further observation by the majority of participants is that in many instances, even amongst those who do understand what planning is, it is an activity that is not valued by some of the other departments within the agency. A constant complaint was that employees from other departments would ask planners what it is that they actually do, other than "slow down projects and say no to everything" (Eve). This however was more common with the departments that do not work closely with planners.

If you have a good relationship with other departments, they respect you but it's never pleasant to be told your work is no good. Timelines are tight and in the eyes of many, planners seem to slow down the process. Accounts sees us more as partners, but with creatives there is conflict... Although sometimes accounts complains that our ideas are too elevated! It really depends on how you get along as a person. (Eve)

But the reality is that there is constant tension between AP and the other departments in agencies. This could be a source of conflict for planners, considering they are deemed the newest addition and many still do not comprehend exactly how they fit within the agency dynamics.

In my experience, even though AP is trying to help creative develop a better idea, they put up a barrier to say "I am the expert in creativity and you are the expert in information." I think the struggle is more from creative. That's a constant battle. With accounts, I think that when you have a planning department they get comfortable since they feel they no longer have to think... If the role between planning and accounts is not clear, than AP ends up doing functions that belong to accounts. (Alexa)

However, most participants felt that living with interdepartmental tension came with the territory and simply learned to deal with it. For many it is actually seen as a positive influence on their jobs.

Tension is positive and it keeps you on your feet. In my case tension is with creative, not with accounts. The relationship with accounts is more cooperative, but AP does require slower thinking, so there are clashes about this with creatives... They are not used to sharing responsibility and do not like to wait for us to get their work done. (Adam)

However, regardless of the department to which planners felt closest, there is agreement on the relevance of AP in the overall process of campaign development, and that tension can very often lead to better advertising. This was best explained by two planners.

Organizations are formed by people, not papers. If tension exists, take advantage of it! Sit down with the VP of Creative and discuss why they don't want to go over the studies and methodologies. Educate the client and the researchers so you can build a shared vision that incorporates everyone. If you don't see conflict and tension as an opportunity, you lost the chance to produce something better, more creative... I think tension, look, it will always exist, everyone... (pause) My former boss used to say "Damn, why doesn't an engineer get told what to do?!" But a planner is always told how to do his/her job! This is about communication, surrounding a brand, but ultimately your goal is to get content across. There is no such thing as stubborn creatives, there are stubborn people! It's personal, so I'm sure that this happens in many different industries. People are people and that's what creates these issues. (Lucas)

So yes, creatives can be frustrated artists, and accounts can be bureaucrats, and planners can isolate themselves in their ivory towers to philosophize and read a hundred books, that ultimately who cares? I'm a pragmatic planner. In my team I always tell them you must be pragmatic. Nobody cares if you read 14 books to get to the idea, just sell it because nobody cares about your 14 books. I think a little bit of tension does improve ideas, always, always... When we are too conformist and we all get along as friends, the idea doesn't go further, but tension is nice when creative questions planners and vice versa. The idea goes further, "what happens if we do this, if we take it here, if we take this further," that's cool, but fighting isn't. Good tension is good. (Sandra)

Ultimately, despite the lack of clarity in its conceptualization and the conflictive relationship with other departments, the overwhelming majority of participants felt optimistic about the role that AP plays in the development of advertising. Furthermore, they also agreed on their belief that it is essential to the current market conditions, and necessary when developing sound campaigns that actually reach consumers.

Roles and Responsibilities

If giving a conceptualized definition of what AP proved to be problematic, asking about their roles and responsibilities opened a floodgate of opinions. The majority of the participants defined what a planner is by what a planner does in vastly divergent terms, always rooted in their own agencies' experiences. When asked about their role in the everyday process of campaign development, most planners described richly their relationships with other departments and the process itself. However, few spoke about specific tasks and practices. For example, in regards to the question of whether they produce the brief for a campaign, responses varied, but the general consensus was that the brief as a document is not as important as the action of briefing creative continuously. The general consensus was centered around AP being essential to the process, but that as a role it does not belong to any given individual or department.

So in reality planning is more something that isn't in any given location. It's an added value that is offered, it's a way of looking at reality. It doesn't mean I have tools nobody can use. I know creatives or accounts people who can do great planning. It came into existence because of a void left in the marketplace... Planning is a verb, not a noun. Planners are not essential, planning is. A good planner becomes essential because he does his work the right way. (Sandra)

Though the list of roles is extensive, it did not yield one unifying theme. Instead, it consisted of a series of complimentary discourses around which the discipline has been

traditionally structured. Virtually all the participants believe that planning's main roles are akin to those described by Baskin (2008). However, most planners stated that despite many of these duties falling within their day-to-day activities, the essence of their work is shaped by the particular needs of their agencies. Following are a few examples.

I think the essence of planning is translation. The key of a good planner is the capability of observation and then translating those observations into a language, concept or proposal that is relevant to that which surrounds a brand, people, things, not just the brand itself. I think [AP] has a function which is latent that has to inspire and mobilize people around the brand promise. I think that exercise of translation and the key of that translation is based on not letting advertising eat you up. If it does, then you lost the opportunity to think, read, observe and get things from looking at a magazine, a pic... I think a planner is the person who is capable of saying look at this, I found it and it makes everything worthwhile. And this inspires people who surround the brand. Not simply just things that are interesting, you have to be able to translate it in a relevant manner. (Lucas)

I'm a searcher, a psychotherapist... My biggest responsibility is to read between the lines. I am searcher who can find and then make connections... It's beyond being the voice of consumers... I find connections between brands and their different parts. (Robbie)

I think you are the person who writes maps of where should you go and how can you get there. That's what I do, and that you develop with the creative team. I have this info about the market, the target, the brand, so I go through here, I go around this mountain, crossing this river, as such... So that's how I see it, as a map trailer. (Sandra)

Our dept has three priorities. We try to build a bridge between the different areas. We seek and study trends to determine what opportunities the brand has. The second offer is the brief, though we prefer briefing. We go beyond a piece of paper, we try to make it something that is a way to better inspire creatives. The third is having workshops with our clients, so we can better educate them on strategies that might be offered in the future. (Scott)

A planner is an integrator, a visionary, a person who tries to break the rules but still make things work, someone who explores new ways to reach their objectives. (Jack)

Planners are the great question seekers, and very curious about communication objectives and the opportunities... but in general terms a

planner is someone who questions everything. Curious because you always ask: Why? Why? Why? And then bring that info to the surface. (Alexa)

What did come across distinctly with virtually all the participants is that the nature of planning is a bridge between thinking great ideas, and connecting them to the realities of brands, clients and the marketplace. Mary described it best when she stated “AP just requires you to think, and then it becomes a shot of espresso within the agency, it’s that boost that takes whatever you do one big step, no, one big leap further!”

The responsibilities revolved around three core areas, depending on each agency’s structure and needs. The first of these is the most traditional function of developing the strategy behind campaigns. As a new and innovative tool, agencies have not been hesitant to promote it as a competitive advantage, which has been extended to agencies that do not have an AP department, but still need to respond to the demands of their clients requesting it.

When developing strategy, we try to understand the context in which the brand is operating. Our agency has exclusive research strategies to identify this within consumers’ minds, culture, and market. We try to identify trends which can have an impact the brand. We reach this through three different factors. The ideal of the brand, what the actual brand is, and then who the target is. We don’t do this by checklist, it is more of a way of thinking, to make sure that the process is bulletproof... AP requires us to think what others are not thinking, to analyze what others are not analyzing and to measure, because we need to justify to clients investing in our ideas. (Scott)

We always start the process in conventional ways, by doing research, but then we find the exact communication tool that will solve our clients’ problems. My department is not planning, because we all do strategy here. It is one of our functions, because strategy goes beyond a document. It requires you use everything you have to enrich the client’s communication. We do not copy and paste briefs from clients to creatives, we have a ban on that since we must process their needs to achieve the best solution. (Dee)

The second area is focused on creative development. In agencies which have had planning for years, strategy *per se* is seen as a conventional way of doing AP, and there appears to be a shift to move in direction of creative planning as departments mature within certain agencies.

AP has changed so much that I feel the name no longer fits or describes what we do. I respect the gurus, but it's no longer that way. It used to be a reflection of the account team but in recent years it has focused more on the creative side, landing ideas that inspire better creative. Many ideas and insights are too elevated and account planners have become more "creative planners"... Account planners must be rigorous researchers, but a creative planner goes beyond that... He/she understands research, but takes it, distills it, and creates something new. (John)

The last of these is pitching for new accounts. When an agency is pitching a new account, the workload for planners is intensive. It starts with a traditional situation analysis of the brand, then followed by strategy development and finally by contributing to the development of the creative concept. Sometimes their work will stretch even further in evaluating whether the final execution is still on strategy. However, AP done for pitches is the shining opportunity for planners. As the following planner explains, in pitches is where AP becomes obvious to the naked eye.

AP is becoming more and more effective as it grows within the industry. But where it is incredibly effective is when pitching accounts. There it becomes very obvious. Here we have won 5 accounts in the last 8 months, and AP was greatly responsible because it was a good strategy that was worked on and developed with creative. (Adam)

Ironically, after the high that comes from winning a pitch and landing an account comes a rude awakening for many planners. Agencies use AP to draw clients in, but once they sign, many times planners do not continue working on their accounts. This is a source of frustration for some, who believe "AP done only to land accounts and not serve the ongoing needs of the client is a disservice to the discipline". (Travis)

Ultimately, as has been stated before each agency will accommodate the roles and responsibilities of its planners according to its particular needs at any given moment in time. But there seems to be a diffused consensus on what the discipline is by its accomplishments. This will be discussed in the next section on how AP is measured and evaluated.

Measurement, Evaluation, and Effectiveness

Measuring and evaluating the effectiveness of any type of marketing communications is a complicated endeavor. Whereas some disciplines have sophisticated methodologies, advertising included, some other areas are far more difficult to cover. According to the overwhelming majority of the participants, AP is one such case. Though each agency has different expectations which vary according to the functions assigned to planners, there is no systematic approach across the industry.

This is problematic for the discipline, since it becomes difficult to gauge AP's true impact, and thus justify investing in planning. However, this is changing thanks to a joint effort from different players throughout the industry. One of the participants who is working on this himself explains.

“AMAP and in the near future APG as well, are working hard to do something about this. In fact, the Effie Awards which are supposed to reward effectiveness have started focusing more and more on AP's contribution within the last few years. The questionnaire that is given to the judges asks specific questions about the planning done on the campaign, such as where did the idea come from and how was the strategy developed. This is little, true, but that's how things are done in the industry, one step at a time...” (Harry)

Though this is definitely a step forward for AP as a discipline in general, the reality is that this is a gray area in most agencies. For example, Scott says that the most satisfying evaluation he can receive is when people in the agency who understand his

contributions will not start a meeting until he joins the team. However, it has taken much work to get the other departments to understand the value of his contribution as a planner and it is a never-ending process of educating others. Following are three very different scenarios in agencies which operate similarly in terms of size, profile and reputation.

Well, in my agency we have a very clear, systematic way of measuring with metrics and all. And that is very important, evaluation of AP I believe has 3 great areas. The impact AP should have in an agency... The first is the idea... Another area is added value, elevating the quality of thinking within the agency. It seems to me that should be an impact from planning. Everything that has to do with educating the agency in issues of trends, keeping people up to date. Not that we are teachers, but yes to keep people aware of what is going on... The third area is the development of tools, research tools that generate a profit for the agency, one that can be sold to the client as an added value. So those are the three areas under which I am evaluated and they are very clear: the idea, added value, and the development of tools. (Sandra)

I think I have never had a strategy evaluated. They have evaluated the department, how we perform, but a strategy in itself has never been evaluated. When we are asked will it work, my boss will say I swear it will, and up to this point that has been enough. It's a tough question because no one has ever done it here before... But times are changing because the new generation of practitioners and the new media landscape require more reliance on non-traditional or decentralized approaches. But he is still slow at letting go. But ultimately our clients make the final decision. We have never forced anything and if the clients say no, than that's it: it doesn't happen. (Dee)

I have come to realize that being right is the best way of being evaluated... I think if you can persuade everyone with your argument, that's the best way. Answering questions and leaving people satisfied and without a counterargument... At a lesser level, praise for my work is also a good form of evaluation. I think that systematic approaches go with traditional forms of doing planning, which I do not like. (Robbie)

This further leads into the issue of effectiveness. Most of the participants stated that AP is effective in some cases, and when receiving full support from the agency and the client, almost always. However, when asked about their opinion of the effectiveness of AP within the industry in general, there was ambiguity in most participants.

I think that some cases are effective, but in general terms, no it's not effective. What I see is clients who identify talent and want those individuals near them. But I do not find a unifying discourse. I believe the industry does not value the efforts of planners, people feel threatened. The Mexican advertising industry I'm not sure if it's effective, but it's pervasive in everyday life because of saturation. There are cases.... I don't know, it's difficult to give a concrete answer... I think there is saturation in every way possible, but that does not mean effectiveness? There are many factors that are not understood. Does word-of-mouth translate into behavior... There's no answer to that kind of question. (Lucas)

Is it effective and what makes it so? The point is that I do believe that there is some intuition, but when you do it coherently with a thought behind the product, it sounds a bit arrogant but yes, you can tell. It becomes obvious... The thing is that many things die with Mexican creativity, we're not in Argentina, but even though the creative work is not the most outstanding, I guess AP is effective... (Daniel)

Within this context, designing and implementing a methodology that would provide a standardized evaluation system seems not to appeal to planners. This is evidenced in the fact that all but one believed that AP is effective in their own agency when done right, but it is seldom effective in other agencies. As the discipline grows into maturity, perhaps a general consensus might be agreed upon, in the meantime, as Harry stated "this is as good as it gets."

Current Limitations and Future Outlook

Throughout the data gathering stage of this study, it became apparent that most planners experienced a cathartic release during their interviews. A content analysis of the transcriptions would suggest that over half of all the data portrays a rather negative state of affairs of AP in the Mexican industry. However, when asked specifically about their satisfaction and future outlook, an overwhelming majority felt optimistic. The future outlook of the discipline in the eyes of planners themselves is very important. Though

many considered the creation of Mexico's chapter of APG as very positive, this optimism was not sufficient to improve the way they perceive the current status of the discipline.

A majority of the participants saw the limitations to the future status of AP planning rooted in the lack of clarity that exists within the industry today. Additionally, since it is not a discipline to originate organically within the Mexican industry, there are few local planners. This consequently affects how the discipline is perceived by the rest of the industry.

Though the perceived obstacles are many, they tended to group around the same areas. Following are a few examples of the things planners felt were the greatest problems facing them in the current environment.

I struggled with honesty and transparency which is not touched much. It has to do with ethics, that has many things to do which are not about morality, but about respect for the person you are working for. Not the client, but the person who is giving you 30 seconds of their time to listen to what you have to say... (Lucas)

I think planners should be connected, and we have no network. We are like bottomless barrels with nothing to feed us... I need to be in touch with others... (pause) We are still in diapers, so our hands are mostly tied because decisions are made abroad by corporations! (excitement gives way to reflexive thought) I think it will take another 10 years at least for it to mature enough. (Jack)

I think the lack of planners in Mexico is another obstacle, because evidently it's like there's an interesting economic argument with the scarcity of planners, planners become more expensive than what we possibly should be. Agencies don't want to pay so much. This is a theme of economic dynamics, because there isn't much formation of planners in Mexico. This causes there to be few planners, and then agencies do not want to invest or contribute to its growth. (Sandra)

These planners talked about threats which they perceived to be currently in the environment, but at the same time did not hinder them from performing their jobs optimally. But perhaps the most eloquent of all the planners speaking of the limitations

she perceived was one who was not working in a planning department at the moment of the interview.

The obstacles are many, I think... on one hand there is no formal training for planners. There is nobody teaching us, we learn as we go. I can't say I am at the level of a UK planner, but that is because we lack formation... There's a lack of inner strength in the discipline. We can complain that there's a lack of clarity as to what planning is, but I think the biggest problem is internal. What we have to defeat is internal, we lack union, we lack a way of sticking together. We are too separate from each other, that is why we are forming APG. I think planners are also lacking formation in other areas. (Alexa)

Though the obstacles were presented in rather abstract form, and with not much discussion of how they affected their day-to-day activities, it is clear that there is a greater effect on issues of morale and performance. Throughout the interviews, it became apparent that many planners are unhappy about what they perceived to be the state of the discipline. The reasons are many, and anecdotes were also plentiful as are exemplified in the following examples.

I think planners are not very satisfied. In meetings planners say it is a very ungrateful discipline. Most people don't realize the enormous amount of work behind what we do. Some clients actually walk up to you after a meeting and tell you, "I don't understand what you do all day, you come in here and give a pretty informed and accurate opinion, but what exactly do you do? Do you read, write, or what?" And that is very hurtful to planners, the lack of understanding and recognition. (Alexa)

I'm unhappy with my status as a planner because I think we should be everywhere. But my colleagues say "No, no, no, that's too much!" But we should be involved in every aspect of the process to safeguard the purity of the idea... I even want to be involved in production! I think my personality works well as a super-planner... I probably wouldn't call it that, but we should have a role and responsibility in the entire process. (Robbie)

And yet, on the other side of the debate, many others expressed their satisfaction with their jobs and the place which they specifically occupy in their agency's hierarchy.

The following two examples illustrate this alternate discourse.

I am happy with my status but I want to continue learning... A planner needs to be renewed and stimulated always, I need to be nourished... (pause) We all complain that we are misunderstood, but mostly we are frustrated because of interpersonal dynamics. (Eve)

From amongst all the people working in advertising, planners are the happiest with their jobs. We are very satisfied because AP is worth more everyday in results. And since it is multidisciplinary, it is very gratifying. I am never bored with my job because it is in constant mutation. (Adam)

An overwhelming majority of the planners interviewed are looking optimistically at the future of the discipline. The potential for growth is enormous in a market that has yet to reach maturity for the discipline. Following is an example which echoed the feelings expressed by the overwhelming majority of participants.

In the US planners are still very much research aides, but in Europe and in Mexico there's a shift to become fully involved in the creative process. Planners have taken their ties off and now show up in sneakers to do work that is more creative. I've seen ads in Spain, Brazil, Argentina, and this shift is happening everywhere! (John)

But what is interesting and perhaps a result of the transnational character of most planners in the Mexican industry, is how keen their gaze is on markets which they considered more developed. This seems contradictory considering that one of their biggest objections is the heavy reliance on foreign markets to supply planners in detriment to having an organic movement made up of locally hired and trained planners. However, as many explained to me during the interviews, looking to the outside for answers is also a part of the Mexican culture.

As to the future of the discipline, one of the planners who has worked in the field of AP in at least four different countries in three different continents expressed her thoughts about the growth of the discipline, even beyond advertising agencies.

I have a hypothesis, I am not very sure, it's just a hypothesis, but I think that ad agencies are functioning a bit as a cocoon for AP. They will sustain and nourish it for a while longer. But I feel that planning is going to leave agencies and it is going to diversify and expand into consulting firms, clients, creative boutiques, as a discipline, not as a person. Just imagine agencies working as incubators, with babies, development will not end there, it will happen as in agencies in UK, US or even Argentina, I think AP will start leaving. What I have seen is that when it is successful, the client gets surprised. And even though it happens rarely, when it really is understood by the client and creative, as it should, not that it happens a lot, but when it does, clients are left very very impacted with the value which AP can add. But from the discipline, not the person. So I think this is the future of AP. (Sandra)

Finally, the depth of the participants' responses made the process of coding a much richer experience. The grouping of the themes into three core categories that would interlock seamlessly in a proposed theory is the subject of the next chapter.

CHAPTER 5: DISCUSSION

The purpose of this study was to provide a detailed account and analysis of the state of AP in the Mexican advertising industry, from the process of adoption to that of roles and responsibilities of account planners. It was expected to provide much needed insight into how the discipline is practiced there, and thus provide a benchmark for future studies to compare AP's role and contribution to the advertising industry.

The study used GT because as a methodology, it provides a rigorous approach to data analysis as it enables the creation of theory rooted on the findings. As was discussed previously, purposive sampling in this study enabled the study to focus on those who could contribute significantly to answering the research questions. There were a total of 18 participants, the vast majority of which are current or former planners. In the case of the three respondents who have not worked specifically with such a title or in a planning department, they were still responsible for the strategy development in their respective agencies, in this way performing as planners.

The three research questions that guided the study have been satisfactorily answered, as was shown in the previous chapter. The main finding was the diffused conceptualization that AP seems to have throughout the industry. This was an underlying issue in the way planners describe their working conditions, their interaction with other departments, how their work is evaluated when it is considered effective, and the obstacles they face.

The present chapter will explore these relationships in depth by analyzing, interpreting and synthesizing what the findings tell us about the nature of AP in the Mexican advertising industry. The chapter has been arranged according to the major

themes that emerged, and how these are interconnected within a theoretical framework.

The themes are as follows:

- 1) The defining role of corporate culture in conceptualizing AP
- 2) Roles and responsibilities of planners
- 3) Expected outcomes of AP within the agency and the industry in general

These categories are directly aligned with the tentative model developed to illustrate the findings of this study (Figure 1, p. 84). Additionally, these categories are directly derived from the research questions. When coding the data, the obvious themes around which to organize it were related to the questions being asked. This provided the necessary structure to organize the findings while it also enabled the necessary fluidity to incorporate the concepts that arose during the process.

In the previous chapter the information was presented in a narrative form, structured in a similar fashion to the questionnaire that guided the study. However, the analysis and implications of the results were not discussed. Therefore, this chapter will take a holistic approach incorporating relevant literature from other disciplines, as the need arises.

The Defining Role of Corporate Culture in Conceptualizing AP

Before discussing the implications of this study, it is necessary to define what culture is and thus, provide a theoretical framework within which to understand the findings. For the purpose of this study, I will adopt an organizational cognition perspective. As its name implies, organizational cognition does not consider culture something that exists on its own, outside of the context of interaction amongst its members (Weick, 1979). Furthermore, it views culture as a way of thinking which is

shared by members of an organization. It is ideally suited to understand the phenomena encountered in this study because, through previous studies in the field of organizational culture:

“...[it] view[s] organizations as networks of subjective meanings or shared frames of reference that organization members share to varying degrees and which, to an external observer, appear to function in a rule-like, or grammar-like manner. Some of these research efforts document how organization members conceive of themselves as a collectivity. They are also often diagnostic, in that they assess the extent to which there is a shared basis for action or grounds for conflict” (Smircich, 1983, p. 349).

An organization’s culture is “learned” by its members as they adhere to it and recreate it for other members (Weick, 1985; Eisenberg & Goodal, 2004). Schein (1990) elaborates further:

Culture is what a group learns over a period of time as that group solves its problems of survival in an external environment and its problems of internal integration. Such learning is simultaneously a behavioral, cognitive and an emotional process. Extrapolating further from a functionalist anthropological view, the deepest level of culture will be the cognitive in that the perceptions, language, and thought process that a group comes to share will be the ultimate causal determinant of feelings, attitudes, espoused values, and overt behavior. For our purposes it is enough to specify that any definable group with a shared history can have a culture and that within an organization there can therefore be many subcultures. If the organization as a whole has had shared experiences, there will also be a total organizational culture. Within any given unit, the tendency for integration and consistency will be assumed to be present, but it is perfectly possible for coexisting units of a larger system to have cultures that are independent and even in conflict with each other. (p. 111)

Considering that agencies are not monolithic cultural entities, but in fact have very distinct differentiations between their departments, it is necessary to include the concept of subcultures. This need to account for overlapping subcultures within the same organization makes organizational cognition the best fit between the findings and theory. The corporate culture of the agencies where the participants worked was the single most

important determinant of the manner in which they conceptualized AP, but this culture was created by the interactions between the different departments, and the perceived needs of the group as a whole.

As many repeated throughout the study, their affiliation to either the account management or creative departments was in direct relation to what is valued at their agency. An agency which prides itself in its creative work would advocate their planners become creative planners, and the opposite occurred with agencies that focused more on developing business strategy for their clients.

This presents a conflict in their interpretation of AP as a discipline outside of their agency. If AP is what their corporate culture says it is, then its character as a discipline outside becomes problematic. However, the staying power of corporate culture in regards to AP went beyond the planners themselves. The existence of diverse subcultures within the same agency or industry, based on each department's operational functions, does not preclude that there can be an overlap that allows flexibility independent from the organization. According to Sackman (1990), this is evidenced constantly in organizations.

What makes a collection of people a cultural grouping is the fact that the people hold the same cognitions in common. The boundaries of cultural groupings are therefore, flexible; they may shift. And the membership in one cultural grouping may just be one of several for a person. Because individuals have several frames of reference at their disposal, the salience of these frames may change depending on the issue at hand. (p. 40)

The difficulty that planners had in reaching a unified definition was due to the impossibility of essentializing the discipline in regards to their own agency's corporate culture. But ultimately, it is that same culture that shapes their own interpretation of the discipline. The implications of this were pervasive in the study's findings. As was

discussed in the previous chapter, one agency had switched the nature of its focus, thus transforming its culture, and consequently, the way AP was practiced within.

Roles and Responsibilities of Planners

As has been discussed earlier, there is no uniform discourse on the roles and responsibilities of planners. These are shaped by three factors: (a) the agency's corporate culture first and foremost, (b) the relationship that AP as a department has with the account management and creative departments, (c) and the interpersonal dynamics of the people with whom they interact.

The agency's corporate culture is pervasive in the day-to-day practices and expectations of planners. This has already been discussed thoroughly in the previous section.

The relationship that the AP department, if there is one constituted as such, has with the other departments is the second shaping factor. The roles a planner takes on are directly related to the responsibilities he/she must live up to. This is determined by the other departments in the agency. If an agency has positioned itself as creatively driven, planners will have the responsibility to contribute to the creative process. In some agencies, the relationship between these two departments has become so entrenched, that planners have become a third member which complements the traditional creative duo of art director and copywriter.

In other agencies where the drive is to offer their clients strategic business solutions beyond or unrelated to the creative production of advertisements, planners develop a closer bond with the account management team. In this scenario, the responsibilities are focused on delivering business rather than creative results.

Finally, a few agencies which do not have a long experience with AP have opted for letting their clients decide what the specific duties of planners will be in regards to their particular account. One such scenario was the agency which had had three different models of planning in recent years. The participant who had gone through this felt he was a “super-planner,” even if he preferred not to be called that. A similar situation was found by Patwardhan et al. (in press) in the Indian industry, where planners had to adapt to be all things when clients demanded such and the agency itself did not delineate responsibilities through its corporate culture.

Expected Outcomes of AP within the Agency and the Industry

The combination of unique corporate cultures and the roles and responsibilities of planners within their agencies’ organizational charts provide a vast array of possible outcomes. However, these are mostly concentrated around three very specific ends: strategy development, creative booster, and new business development.

In the area of strategy development, the corporate culture tends to be focused on satisfying the client’s business needs, regardless of the creative energy invested in the final product. For some clients, creativity is secondary to strategy, and this is evidenced in their relationship with the agency that holds their account. This is one of the reasons AP was born in the British industry (Steel, 1998), and because of this is seen as the more traditional form of planning. Some of the respondents dismissed this function as obsolete or “old-school” when it is its own end. The reality is that the vast majority of planners do it in their day-to-day performance, though some see it secondary to their contribution to the creative process in and of itself. But behind every creative idea that a planner works on, there should be strategic thought.

In regards to being a catalyst for better creative, the overwhelming majority of planners felt that this is where their greater contribution to the process could be found. Additionally, as the industry continues to incorporate AP, this is the gimmick they are using. Using the argument of strategic thought as an added value is a double-edged sword. When AP as strategy development is presented to clients as an added value, the immediate reaction is to ask whether there was no strategic thought before. To make matters worse, clients then wonder what the account management team has been doing, other than “taking down orders” (Peter) if they have not been developing a strategy behind their campaigns.

However, when the idea that AP provides a strategic business view into the creative development process, it is easier to sell, and thus charge, for AP as an added value to clients. This was discussed in detail by Peter, whose position in the agency is not only as planner but also as a part of the account management department.

Regardless of whether this debate has reached planners personally, according to the majority of participants this is where AP in Mexico seems to be. The contributions of AP to the creative department are undeniable in the minds of planners, and those who truly understand it will have an advantage in a highly competitive industry.

Finally, the area of new business development is a combination of the two. For many planners, this is the ideal balance and unfortunately, it truly only happens when pitching for new accounts. For example Adam, a planner who has won several accounts recently because of good AP laments the fact that once the account is landed, he rarely gets to work on it again. When he does, it is either to go over the strategy developed by an account executive, or to check with the creative department on whether the execution

is still on strategy. This leaves him frustrated as he believes it short-sells the client and the agency. AP is most obvious in the process when pitching for new accounts, and if it continued to be relied upon once the client has signed with the agency, there would be better advertising, happier clients, and more business overall. The majority of respondents also felt that new business development is a unique outcome that has nothing to do with the day-to-day operations for an existing client. If clients themselves were to start demanding that the planning promised during the pitch be incorporated in their ongoing relationship, agencies would have to increase the size of their AP departments, something that might not be financially feasible in the near future.

With the increasing role that AP is playing in agencies throughout the country, it is likely that these outcomes will blur to the point where strategic thought can be found behind every creative idea, and that old and new accounts will benefit equally from the discipline. As APG develops training programs, one of the objectives should be to rid the discipline of territorial turfs within itself. Planners should not have to choose to focus on one function in detriment of the others. In fact, the most successful AP is that which uses a well thought business strategy to inspire better creative with the goal of not only attracting new accounts, but providing growth for those which are already with the agency (Steel 1998).

In summing up the discussion of these results, it is important to note that the structure presented is rooted in GT criteria. The coding done was open and selective (Strauss & Corbin, 1990), and the themes which emerged fit well together to present a tentative theory which can offer hypotheses for testing in subsequent studies. Due to the

exploratory nature of the study, the purpose was to answer the questions and create a workable paradigm for subsequent projects within this research agenda.

CHAPTER 6: CONCLUSIONS

When this study was initially conceptualized, it was intended to provide a simple and congruent view of AP in the Mexican advertising industry. The results encountered a much more complex phenomenon. The youth of the discipline in the local industry combined with the specific dynamics of its adoption have created a scenario which does not conform to what has been documented in other industries. Though it does not appear that a new way of doing AP has originated in the Mexican industry, it is also evident that no unified discourse has developed surrounding it.

The group of participants was targeted purposefully, because their specific experience made them ideally suited to answer the research questions. But the findings went against the notion that AP would be a uniform practice. From the titles attached to the participants' names, to the expectations that clients and agencies had of their work, the variation was greater than expected. And yet there was solidarity in the group, evidenced in their belief that forming APG in Mexico would help them find their place in an industry that has embraced their work much more quickly than their discipline.

The significance of this study is grounded in the need to document an area which has been overlooked far too long. The Mexican industry has just been surpassed by its Indian and Brazilian counterparts in expenditures within the last two years, but it is still mostly absent within the academic literature. The findings go beyond documenting what is taking place in the industry, they offer an incipient view of what happens when practices developed in mature industries make their way to developing markets by way of multinational corporations. The lack of uniformity or consistency in the way the

discipline is practiced in the Mexican industry is indicative of the non-organic nature of AP in that market.

In regards to the relationship that corporate culture has with the conceptualization of AP, as has been documented in the literature (Eisenberg & Goodal, 2004; Sackman, 1990; West & Ford, 2001), culture is a pervasive and deterministic force within any organization. Some agencies have a stronger culture than others because they are more efficient at communicating it. But what cannot be denied is that it shapes the practices of its members. For this study, it was found to be the single most important concept to account for variation.

The roles and responsibilities of planners are also an area that warrants special attention. As the industry has incorporated AP, agencies have had to make room in their organizational charts to accommodate planners. This has created a tense environment in most agencies, and though productive, it is still the result of people not being sure of what their role is in regards to the overall process. I believe this tension will never fully disappear, as it exists in any corporate setting where close interpersonal relationships are the basis to conducting business. As expectations about the needs that planners must satisfy become more explicit, the ambiguity that surrounds their roles and responsibilities will also fade slowly. Some of the planners resist the notion of having well-defined job descriptions, since the diffuse approach that many agencies take enables them to put more of their creative skills into practice.

Finally, the outcomes of AP are directly correlated with the previous two issues. Though they overlap and feed off of each other, planners themselves could identify them distinctly in their day-to-day operations. Being asked to stop being strategic so they could

become creative is something that they did not seem interested in doing, and further less when it was reversed. It seems that planners worked best and were happiest when they were able to combine these functions as in the case of new business development. It might serve the planners well to make this a crucial issue of APG's agenda.

Study Limitations

This study was conducted as a dissertation thesis over the summer of 2009. In methodological terms, the limitations were difficult to overcome. This is a field of little to no research, and the literature is almost non-existent. However, the use of GT enabled the data to develop a blueprint of where this study needs to go next. This does not mean that positioning this study within the overall literature on AP and advertising in developing nations is simplified. It is still necessary to relate it to the work that other scholars have done. Furthermore, it is necessary to tackle the issue from a different perspective, that of advertising professionals who work with planners. The present study included a variety of voices within the realm of AP, but because of its exploratory nature, failed to collect the experiences and perceptions of creative and account management advertisers.

Another issue of concern is the importance that axial coding—going back to the field for more data once the coding is initiated and deficiencies are detected—is very important to GT. Unfortunately, due to logistics this was not feasible and reliance on e-mails when clarification was needed was done instead. Though the response was positive, the messages lacked the depth and richness that only face-to-face interviews can provide. In the near future, it might be suitable to present the results to the participants in person to gauge their reactions and incorporate them in this study. Furthermore, incorporating the

experiences of other advertising professionals and comparing them to each other will further strengthen this study.

Recommendations

As the impact of globalization on different realms continues to receive scholarly attention, similar studies will continue to inform the research agenda of academics worldwide. The implications for both the industry and academia are promising at the least. Recommendations for furthering this study come at two different levels.

First, it is important to continue documenting the impact that AP as a discipline is having in different markets. During the execution of this study, planners working in Mexico organized themselves to start a local APG chapter. Their goals are to offer planners the appropriate tools and education needed to carry out the ever changing and demanding roles that the Mexican industry demands of them. It is recommended that future research evaluates the role and impact that APG will play in the industry as a whole, but more importantly, in the planners individually. After all, planners are a close knit group which has been forced to organize around their discipline with planners from other agencies despite working in one of the most competitive and secretive industries. An understanding of this will further the discipline both academically and professionally.

Though it is novel within the repertoire of business practices, strategizing, which is at the heart of AP, is not. Conducting similar studies in countries which have established APG chapters seems to be both sensible and necessary to further the discipline. A constant complaint from the participants was the lack of training of local planners both academically and professionally. Whereas APG is developing a plan to overcome the latter, the former is mostly ignored. In order to address this issue, it is

necessary for academics to form a program based on the realities of the local market. Studies such as this one can facilitate this project.

Second, and in close relation to the first, it is necessary to continue research in industries that fall outside the North Atlantic development model, or the BRIC group. Important though research in these regions is, there is a great part of the world that is excluded by this limited perspective. The Mexican industry, as most of its Latin American, African, and Asian counterparts, have been mostly overlooked in the academic literature. This has a negative impact on the local industries, the academic communities of these countries, and on the corporations who conduct business there.

As consolidation continues to take place in media and advertising conglomerates, what affects one region might extend to the next. However, unless there is a process of documenting this it will go unnoticed, in detriment of all parties involved. In the age of globalization, academia must take a holistic approach that is in tune with the socioeconomic and cultural realities of so many nations.

AP has had a bumpy road in the Mexican advertising industry. It started off slow, and it has grown at a slower rate than in other markets. And yet it did not face the adverse reaction that was seen in other nations, such as Australia (Butcher, & McCulloch, 2003). What is clear is that it is now taking off with a stronger footing. This is evidenced in the incorporation of the discipline in more agencies; in the process of awarding Effie Awards for planning, which are important in the industry; and last, but most importantly, in the recent creation of APG Mexico. However, it is not enough to understand how planners view themselves and/or their discipline. It is also imperative to develop an understanding from the industry as a whole.

In summary, this study has provided a blueprint for a grander research agenda, since it has enabled a tentative model that can posit hypotheses to be tested, particularly through the prism of other advertising professionals who are not planners, or for clients who are ultimately those most likely to benefit from their work. Keeping this in mind, it is clear that this is an exciting time to be a planner in Mexico, and to see how AP contributes to its advertising industry.

FIGURE

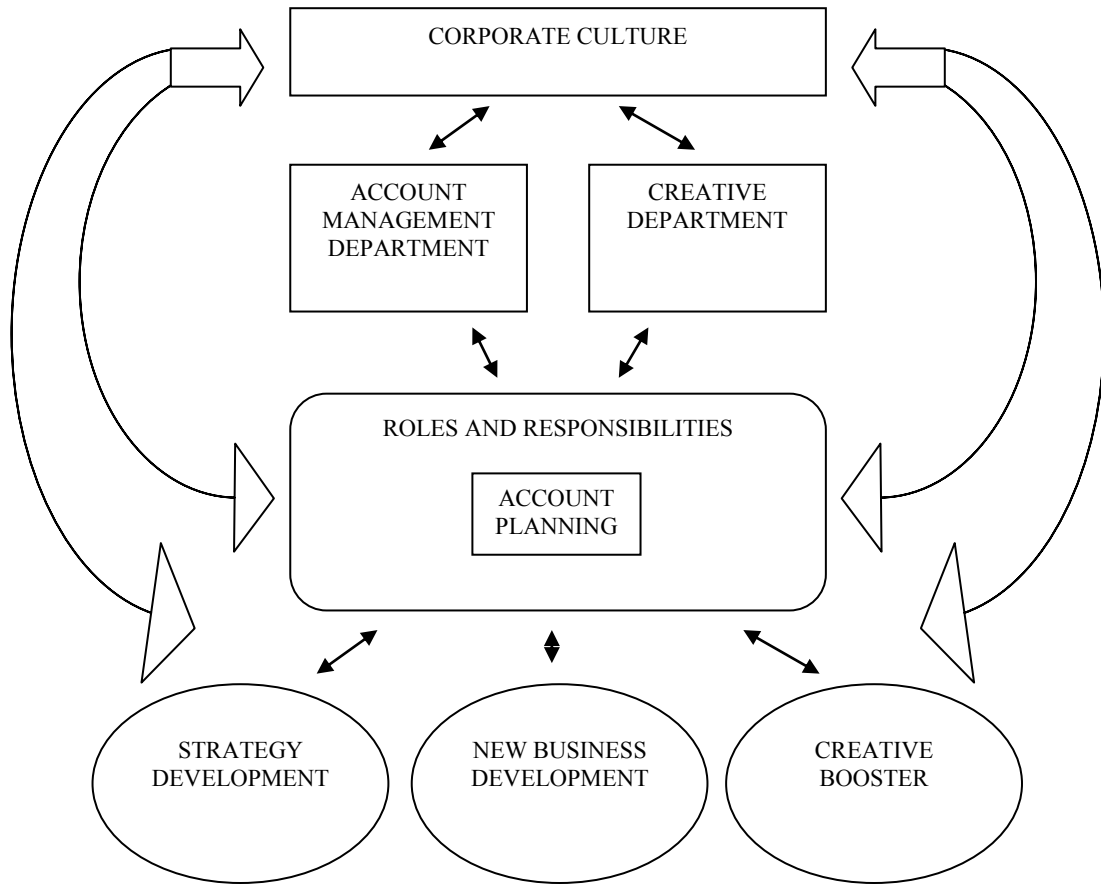


Figure 1. Account Planning.

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APPENDIX A

Account Planning Interview Questions

1. What is your educational background and how did you come into advertising? When did you start working as a planner?
2. What is the typical process through which a campaign is developed in your agency?
3. How would you define/conceptualize AP? What does it mean to you?
4. Do you feel that account planning is an essential function of an agency? Elaborate.
5. What does account planning bring into the advertising process in a way that the other usual functions of the agency cannot?
6. What has motivated account planning's use in agencies?
7. To what extent do you think account planning has been adopted by Mexican agencies?
 - A) What is the planner's role in the campaign development of process? In what stages do they participate? Why?
 - B) How are planners trained? By whom? Where?
 - C) Is the planner also involved in non-traditional areas in the marketing communications mix, such as PR, sales promotion, special events, etc.? How involved are they? Why?
8. What obstacles do you see for account planning in the Mexican advertising industry?
9. How do other agency departments feel about account planning? Is there tension? If so, how is it addressed: does it contribute to creativity or does it present a roadblock?
10. What is your perception of the effectiveness of account planning in your agency? In others?

11. Do you believe account planners are satisfied with their current role and status? Are you?

12. How is your work evaluated? To your knowledge, does this vary from other agencies?

13. Finally, if you had to define AP by what you do—I am what I do—what would that be?

APPENDIX B

Cuestionario para Entrevista sobre Account Planning

1. ¿Cuál es tu formación académica y cómo llegaste a la publicidad? ¿Cuándo iniciaste en AP?

2. ¿Cuál es el proceso típico de desarrollo de una campaña publicitaria en tu agencia?

3. ¿Cómo defines/conceptualizas AP? ¿Qué significa para ti?

4. ¿Te parece que AP es una función esencial dentro de una agencia publicitaria?

Elabora.

5. ¿De qué manera contribuye AP al proceso de desarrollo de la publicidad de forma única? ¿Ningún otro departamento cumple con esa función?

6. ¿Qué ha motivado la incorporación de AP en agencias mexicanas?

7. ¿A qué grado crees que AP ha sido adoptado por las agencias publicitarias mexicanas?

A) ¿Qué papel desempeña el planner en el proceso de desarrollo de una campaña?

Elabora.

B) ¿Qué entrenamiento reciben los planners en las agencias mexicanas? ¿Por parte de quién? ¿Dónde?

C) ¿Son incorporados los planner a la hora de desarrollar estrategias en áreas fuera de la publicidad, tales como promoción de ventas, RRPP, eventos especiales, etc.? ¿Cómo se les involucra? ¿Por qué?

8. ¿Qué obstáculos le ves tú a AP en la industria publicitaria mexicana?

9. ¿Cuál es la relación de AP con respecto a los otros departamentos dentro de la agencia? ¿Existe tensión? Si es así, ¿contribuye al proceso creativo o es un impedimento?

10. ¿Qué tan efectivo crees que sea AP en tu agencia? ¿Y en otras?

11. ¿Crees que planners se encuentren satisfechos con su actual rol y estatus? ¿Y tú?
12. ¿De qué manera se evalúa tu trabajo? ¿Crees que esto varía de una agencia a otra?
13. Finalmente, si tuvieras que definir AP por lo que haces—soy lo que hago—¿qué sería?

APPENDIX C

Name	Place of Origin	Field of Education	Place of Education	Years in Advertising	Years in Planning/Strategy	AP Department	Gender
Aaron	South America	Philosophy	South America	8	8	Y	M
Adam	South America	Law/Advertising/Business	South America	15	4	Y	M
Alexa	Mexico	Marketing/Business	Mexico/USA/Europe	10	5	C	F
Daniel	South America	Communication	South America/Australia	10	8	Y	M
Dee	Mexico	Communication	Mexico	20	15	N	F
Eve	Mexico	Global Marketing/Integrated Marketing Communications	USA	12	4	Y	F
Harry	South America	Integrated Marketing Communications/Business	Mexico	15	10	N	M
Jack	Mexico	Communication	Mexico	10	8	Y	M
John	South America	Psychology/Marketing/Business	Mexico/USA	21	18	C	M
Kate	Mexico	Law/Communication/Marketing	Mexico	7	6	N	F
Lucas	South America	Sociology/Business/Literature	South America/Mexico	8	8	Y	M
Mary	Mexico	Psychology/Education	Europe	6	4	Y	F
Oscar	Mexico	Journalism/Communication	Mexico	16	13	Y	M
Peter	Europe	Liberal Arts/Business	USA/Europe	15	12	N	M
Robbie	Mexico	Communications/Public Relations/Advertising	Mexico	3.5	3.5	Y	M
Sandra	South America	Sociology	South America	14	14	Y	F
Scott	Mexico	Marketing/Music Composition	Mexico/USA	8	7	Y	M
Travis	Europe	Economics/Business	Europe	30	30	C	M

Table 1. Participant Characteristics