

# Optimising communications for charity brand management

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- *The paper presents recommendations on how to enhance communications planning through new integration and media neutral planning techniques (open planning) linked to Integrated Marketing practice. The paper is based on best practice research in charity and commercial sectors, including NSPCC and National Trust.*

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## **Introduction**

Human relationships are founded on communication. It is through communications that people establish common meaning and understanding (Duncan, 2002). A brand is fundamentally a mental phenomenon and a result of communication. Thus a brand is indissoluble from communication and each interaction of the brand with an individual also constitutes an act of communication (Jenkinson, 2000). Consistent, coherent and congruent messages have positive effects, while mixed, contradictory or confused messages are dysfunctional, diluting the message or creating negative ideas about the brand. The paper outlines an empirically derived enhanced planning method to achieve the positive effects.

The purpose of marketing communication is to add value that benefits both the 'customers' and the brand (Yeshin, 1998; Duncan, 2002; Fill, 2002). (In this paper, 'customer' refers to donors, members and other parties who gain value from the support without being employed by the charity.)

The paper draws on research from both the nonprofit/NGO and commercial sectors and explores the practice of communication as a contribution to brand and mission-building within the context of Integrated Marketing, for which a model will be presented. It will therefore explicitly examine communication from a broad perspective, for example, the importance of employee communication and the relation of organisational identity to brand identity. Given the importance of communication, it will then argue that the communications planning and management process needs to operate on a 'channel neutral' and 'integrated' basis, and that this is so frequently not the case that significant opportunities for improvement exist for most organisations including charities. Indeed our research suggests probable gains in the range of 10–25% performance enhancement. (Despite the fact that charities have become increasingly professional in their marketing, they appear to share most of the problems noted in other sectors.) Indeed, important components in the current canon of marketing practice need significant updating. An outline of an enhanced communications planning method for charity (and other) brand management will then be given, in the context of a model for Integrated Marketing management. For charities, with their special

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need to prove efficacy of spending on activities outside their core mission, such as marketing, these findings are particularly important.

These recommendations represent a development of Integrated Marketing communications (IMC), customer relationship management (CRM) and other related fields (Jenkinson, 1995, pp 3–24; Kitchen and Shultz, 1999, 2000). Both, IMC and CRM have enjoyed widespread adoption, including the charities such as the National Society for the Prevention of Cruelty to Children (NSPCC), Salvation Army, Whizz-Kidz, Oxfam, UNICEF and the National Trust, to create competitive advantages in the form of brand differentiation and positioning and supporter loyalty (Jenkinson, 1995, pp 108–138; Kitchen and Shultz, 2001; Woodcock *et al.*, 2003).

The essence of IMC is generally to create communication synergies and message amplification by combining, integrating and harmonising elements of the marketing communication mix. Many organisations have also developed IMC operations as a response to increased fragmentation (or differentiation) of media and the tendency towards thinner segmentation of customer/donor base (Tedlow, 1990; Eagle and Kitchen, 2000; Durkin and Lawlor, 2001; Schwartz, 2001; Billet, 2002; Jenkinson and Sain, 2004a). 'Media neutral planning', which aims to optimise communication mix by eliminating bias and other sub-optimising factors, is a further consequence (Billett, 2002; Neill and Regan, 2004; Jenkinson and Sain, 2004b). Integration, therefore, promotes consistency and harmony while neutrality focuses on mix optimisation. Furthermore, although the term 'media neutral planning' emphasises media, it is clear that the issue in practice is more than just media. Practitioners are also concerned with the disciplines, that is, the communications method or tool used with the medium. Thus, DRTV has a different emphasis from classic TV-based image-advertising. Jenkinson and Sain (2004b) propose the term 'channel' to mean the fusion of a communication discipline (advertising direct, PR, etc.) with a medium, where media consist of every contact that conveys a message to an

audience. Furthermore, they show how multiple disciplines can play a role in a single communication event (such as a mail pack).

The need for better management of individual customers and customer interfaces also encouraged marketers to develop CRM and relationship marketing practice (Christopher *et al.*, 1991). These developments have been boosted by increased accessibility of IT resources and consumer databases (Jenkinson, 1995, pp. 44–58; Kitchen and Schultz, 1999; McGoon, 1999; Woodcock *et al.*, 2003), the need for reinforced loyalty and customer equity through relationship marketing (Gonring, 1994; Jenkinson, 1996; Reich, 2001) and the importance of creating and feeding brand equity through image (McLaughlin, 1997; Wood, 1997; Schultz, 1999), although brand equity (the enhancement of financial value gained by loyalty to a brand) and customer equity (based on earlier concepts of goodwill and lifetime value) are reciprocal and in some ways equivalent concepts.

However, practitioners and theorists agree that these initiatives cannot be separated when communications and brand optimisation is sought, and as a result the concept of Integrated Marketing has come into use. In some cases, this represents what Shultz and Kitchen describe as 4th generation IMC (Schultz and Kitchen, 2000), involving financial and strategic integration, or is a communications-oriented approach that blends IMC and CRM disciplines (Iacobucci and Calder, 2003). Alternatively, it is seen as a larger discipline that involves organisation-wide synergies, as in the Jenkinson and Sain definition: an holistic discipline developing congruent, sustainable and high-value brand experience for all stakeholders (Jenkinson and Sain, 2004e). We propose that for the sake of clarity, this would be extended to: an holistic discipline that involves the whole organisation in developing congruent, sustainable and high-value brand experience for all stakeholders.

Thus, the best practice in communications planning integrates it into a coherent organisational and brand identity with the communication-mix developed creatively and

rigorously to optimise spend and performance across all brand-customer interactions. Our research supports that of Kitchen and Schultz (2000) and shows considerable evidence of practitioner adoption and intention. COI, IBM, P&G, Coca-Cola, Unilever, Nestle Rowntree, Masterfoods, National Trust and the NSPCC, amongst others, have made decisive shifts in communications planning.

The conclusions are that significant opportunities exist for enhancement, including:

- Brand recognition and image enhancement (McLaughlin, 1997);
- Increased loyalty, with consequent financial effects (Jenkinson, 2000);
- Enhanced selection of media and disciplines (i.e. channels) with efficiencies in contact cost and reach as well as increased communication effectiveness (Billett, 2002; Jenkinson and Sain, 2004b);
- Media-multiplier effects, which lead to enhancements in communication power through synergies between communication channels when they work in harmony (Smith, 1997; Weser, 1997; Billett, 2002);
- Enhanced management of customers/donors over time and across contact points (Christopher *et al.*, 1991; Fill, 2002);
- Enhanced employee commitment and alignment, with consequences for organisational performance and customer/donor experience (Jenkinson, 2000; Pech and Slade, 2004);
- Reduced operational and marketing costs relative to effects (Jenkinson and Sain, 2004b).

### ***Challenges and the need for change***

However, there remain significant and recognised challenges and failures in achieving this optimisation, (Jenkinson, 2000; Jenkinson and Sain, 2002b; Woodcock *et al.*, 2003; Kitchen *et al.*, 2004). These include performance gaps in: listening to and understanding stakeholders and developing effective stakeholder typology; understanding the brand and organisational identity; achieving coherence between pro-

mise and delivery; consistency and coherence across contact points and organisational units; achieving customer-centred brand and agency marketing organisation and infrastructure; collaboration and co-operation in client-agency and agency-agency relationships; accurate, unbiased beliefs about communications channels; quality databases and data; effective tools for communication-mix planning and lean marketing processes.

The consequences include:

- Fragmented or contradictory customer/donor experience between the advertisement and the actual service or from campaign to campaign or across the organisation;
- Divergence between customer promise and employee experience (brand values and cultural values);
- Marketing professionals in communication discipline silos each with their own agency, objectives and evaluation criteria;
- Agencies operating within singleton disciplines, in competition with each other, or an integrated agency with profit centres competing for budget;
- Sub-optimal media mix planning;
- Sub-optimal working across the disciplines;
- Professional training fragmented into discipline fields.

As a result, Jenkinson and Sain estimated that the typical UK brand, including charities, could obtain a 10–25% enhancement of communication cost-effectiveness (Jenkinson and Sain, 2004b).

### **Methodology**

In addition to a literature review of academic and practitioner publications and databases such as the IPA Effectiveness Awards, the paper is informed by case study research of over 30 brands involving qualitative and analytical research, and also more than 80 in-depth practitioner interviews, mostly in the UK, with senior marketing decision-makers from a variety of industries and disciplines, along with senior academics and representatives from

professional bodies such as the CIM, IDM and D&AD. A range of qualitative and quantitative investigative methods were deployed, including in-depth interviews, focus groups, action research, action learning, appreciative enquiry, participative discussion techniques, questionnaires, tools development and testing.

Two case studies of the National Trust (Jenkinson and Sain, 2004c) and the National Society for the Protection of Cruelty to Children, NSPCC (Jenkinson and Sain, 2004d) also show their contribution. Both are the leading UK charities and provided access to confidential information, in-depth interviews with executives and agency representatives and observation of planning meetings.

A significant contribution is also drawn from a 15-month research project into media neutral and integrated communication planning involving a judgement panel of more than 20 senior marketing decision-makers operating across charitable, B2B, FMCG, consumer durables and consumer services sectors (MNP Best Practice Group, Jenkinson *et al.*, 2004). Members belonged to both brand and agency sectors, with agency representatives from PR, advertising, direct, media planning and other disciplines. Twenty further senior marketing professionals had a consultative role supporting the core group. The participants dedicated typically around 30–40 hours each to the research project, which ran from November 2002 to December 2003. The methods used included plenary meetings with activities such as discussions, expert witness statements, presentations, workshop activities, assignments and illustrative examples. In parallel, sub-groups worked on agreed assignments and shared their findings with the group. All meetings were recorded and transcribed, since information recalled from memory is imprecise and often likely to be incorrect (Seidman, 1998). The group also used a web-based forum that represents an additional data source. Findings were reported back and agreed. This resulted in a set of recommendations that constitute a comprehensive approach to planning known as ‘Open Planning’, which were endorsed by the CIM in January 2004

(www.shapetheagenda.com) and forming the core substance of this paper.

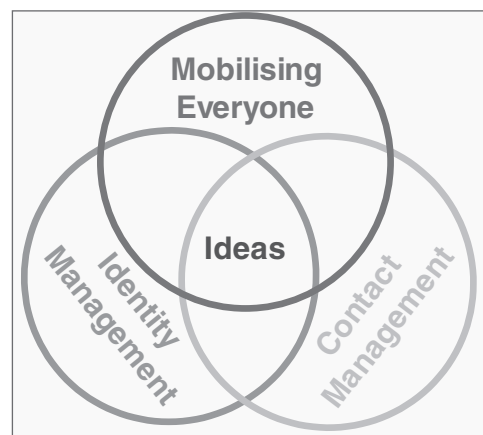
Finally, the paper draws on a major UK-wide survey of larger brands and their practice. Although this is not complete, preliminary findings (N = 60) reinforce and support the need for change (Jenkinson, 2004b).

### **Model for integrated brand management**

While the paper concentrates on communication planning, it is important to put this in context. **Figure 1** illustrates the integrated marketing model for action. It presents three synergistic areas or facets for management, united and aligned by shared ideas:

1. Identity management: who are we, really, why are we different, what are our aspirations, what value do we offer?
2. Mobilising everyone: a leadership challenge;
3. Contact management: effective, coherent management of every touchpoint to all stakeholders.

Ideas represent the means of achieving coherence between the elements (Pech and Slade, 2004). Key ideas include: brand essence and personality; positioning; purpose and governing idea; communications idea; values and strategy. These three facets are discussed below.



**Figure 1.** A model of integrated marketing.

### Identity management

Every organisation benefits from a clear, shared mental picture of its identity that is deeply rooted in its reality. Any organisation should possess something distinctive and unique that characterises it and makes it recognisable in relation to other entities. In addition, it should identify a set of aspirations that are coherent with its identity. The value that it delivers should reflect its uniqueness. For this reason, Porter (2000) describes positioning as the fundamental of strategy. For a charity, this is rooted in the charitable purpose or mission. Identity must then be transformed into management tools and processes. Identity first needs to be determined — as a truth — and then maintained through tools and processes that operationalise its care and nurture.

The NSPCC is a children's charity founded in 1884 to alleviate children's suffering. In 1998, it launched FULL STOP, an ambitious commitment to end child abuse in UK by 2020. FULL STOP is a governing idea that reflects the purpose with which the NSPCC was created and is a distinctive expression of it. It is not merely an appeal, as it has been regarded in the past (Pegram *et al.*, 2003), instead it provides strategic clarity and purpose and unites all endeavours and communications to all audiences: children, parents, donors, sponsors, public policy makers, employees, volunteers, etc. Each audience is addressed in a distinctive way with a distinctive and relevant proposition.

Consequently, the NSPCC functions pursue their agendas in harmony. The prime responsibility of the Communication function is centred on external communications. The Fundraising function's objective is to ensure financial support and the Public Policy function works towards changing the public policy framework in favour of children's protection from abuse. Each function directs its activities to different audiences with different but coherent objectives rooted in the NSPCC identity and shared mission.

At the National Trust, the UK's leading heritage preservation charity, lack of clarity

about the brand led the direct marketing department — responsible for membership recruitment and management to commission research to identify the National Trust brand essence and other aspects of its personality (the 'Brand Signature'). Thus the requirement arose from a concrete need. This tool was then deployed across the organisation — from the experience in the teashop to fundraising. It is notable that it is Direct Marketing that leads this project.

### Mobilising everyone

The second facet is described as 'mobilising everyone'. Clearly, effective mobilisation needs good, integrated team-based process (Piercy, 2002, pp. 219–267). Beyond this, however, organisational success depends on the level of support that leaders are able to achieve across the organisation and its external agencies. When it comes to brand management, the employee and other internal and value-stream stakeholders (such as agencies) are equally important as the customer as an audience for action and communication (Normann, 1984; Reichheld, 1996; Jenkinson and Sain, 2004e). Any change encounters an initial degree of resistance and can only happen if people believe that they (individually and/or collectively) will benefit from it (Jenkinson, 1995, pp. 171–191). Therefore, command and control management and silos, with power-based management practices, are unsatisfactory for brand management. They produce unhealthy, even toxic, cultures, employee disaffection and high inefficiency on-costs, except in cases of critical crisis perhaps (Teerlink and Ozley, 2000). Plans rooted in the organisational purpose, for which employees signed up, are more likely to be effective (de Jong, 1999).

Ghoshal and Bartlett (1998) argued that in an environment where people no longer know — or even care — what or *why* their companies are, leaders can no longer afford to focus only on refining the analytic logic that frames strategic processes. They believe that strategies can engender strong, enduring emotional

attachments only when they are embedded in a broader organisational purpose. The corporate leader's greatest challenge, they argue, is to create a sense of meaning within the company, with which its members can identify, in which they share a feeling of pride and to which they are willing to commit themselves. In short, top management must convert the contractual employee of an economic entity into a committed member of a purposeful organisation. Thus, considerable overlap between identity management and mobilisation exists, the common ground being the shared ideas and the relationship between purpose and identity. Crucially, this implies the congruence based on truths of the brand and organisational purpose.

These organising ideas encourage *creative alignment* of individual members of the organisation and its functions (Jenkinson and Sain, 2002a). Successful mission or purpose ideals have the effect of simultaneously giving clear direction and creative permission as to how to achieve objectives. There is a sense of coherence and meaningfulness that binds people together in common purpose and in creative, learning engagement across the organisation, enhancing cultural health and organisational success.

This is the big advantage of charities. For example, FULL STOP is an idea that gives the NSPCC management a tool to align the whole organisation. Internally, it represents a clear expression of a worthwhile cause. It gives direction and a meaningful purpose for the organisation. The primary task of the NSPCC communications director is to ensure that everyone in the organisation shares the same ideal and works towards achieving the NSPCC mission so that each member of the 1800 staff and every volunteer (17 000) is on board and actively involved and aligned.

Collaboration between the Communication function, HR and external agencies at the NSPCC produced a collective buy-in, cohesiveness and clearer vision about the direction of the NSPCC. Employees, agencies and volunteers understand where the NSPCC is going and their role in this mission. They identify with the ideal and

experience the overlap of their own values and the values of the organisation. Internal research shows the sense of belonging to the organisation and each other increased. Job satisfaction, morale and productivity increased. It also crucially binds trustees and management in a shared framework. Agencies report the feeling of working in 'a cohesive team that is really committed to find the best possible solution'.

At the National Trust, the development of the brand identity and purpose involved extensive consultation with employees, volunteers and trustees over several years as well as workshops and training to involve everyone in implementation. Employees and managers reported enhanced the motivation as the clarity increased.

### Contact management

Thus management of clarity and coherence about identity and creative alignment and mobilisation are collaborative ventures that are rooted in the charity's purpose. Communication to all stakeholders, the third facet, is enhanced by these as well as being a means to enhance their effectiveness. Thus the three areas have systemic relationships. To optimise effectiveness, significant changes to communications practice are therefore recommended.

Over the last decades, marketing differentiated between a dozen or more communication methods (e.g. advertising, sales promotion, PR) with a strong semi-autonomous drive to optimise each method (Jenkinson and Sain, 2004e). However, Kitchen *et al.* (2004) point out that the benefits of specialisation are partially wiped out by fragmented working practices, dysfunctional organisation designs, inconsistent evaluations, inappropriate reward mechanisms and inter-disciplinary competition. The UK charities in health, social issues and heritage protection have reported that they frequently evaluate TV, radio and press advertising by selected awareness/brand attitude factors, while measuring mail, DRTV, web, SMS and other communications by responses. This is not surprising since it is assumed a good practice in the industry and even by the academics.

Jenkinson and Sain (2004b) argued that some of these divisions arise out of accidents of accounting and commission, like the concept of 'above and below the line', while others are the consequences of agencies and marketers, claiming special abilities (e.g. direct's accountability). They argue that what unites is more important than what divides the disciplines. Jenkinson (1995, pp. 28-31), Broadbent (1998) and Schultz and Kitchen (2000) claimed that communications that use sophisticated databases can show the same powerful innovation and potential brand contribution that was once associated with great advertising campaigns. The National Trust noted the impact of direct mail on brand development. The Institute of Direct Marketing, American Express and UNESCO have all used direct mail as important brand-building activities. Boots, the leading UK chemist and personal goods retailer, launched a new cosmetic product using mail at 64% of TV cost and 27% more effectiveness in generating awareness (Jenkinson and Sain, 2003a). Passat reported that over the course of some 5 years of building the brand, TV was assigned the responsibility for building positive awareness, while direct mail was used to inform (brochures) or generate leads. Research did prove that TV was affecting awareness and attitudes, and direct marketing was producing responses and leads. Their own econometric analysis, however, shows that this clear division told only a part of the story. Instead, each element actually provided a diversity of benefits. For example, TV advertising was closely correlated not only with awareness/attitudes but also with sales. Cancer Research UK agency representatives reported to us that DRTV achieved 'off the scale' brand-building emotional effects, while UNESCO agencies reported fundraising mail, creating significant brand-enhancing effects. This is indeed not merely a widespread but a standard function. There was a consensus on this point in the MNP Best Practice Group, with numerous examples cited. Furthermore, it was noted that in practice (and empirically demonstrable), any communications discipline or medium is potentially capable of achieving

any communications objective. Thus, a more effective planning strategy is based on assessing a mix of objectives and their relative priorities for each communication activity.

Marketers are consequently questioning established wisdom, with leading players developing new tools and structures. John Grant, co-founder of St Luke's, confirms, 'The media shift is from passive, single medium to interactive mixes of media. That doesn't just mean a shift from TV to the Internet. It is a shift to anything *with* anything. Sony describes it as moving from 'broadcast to anycast'. A big TV show now has an interactive component and at the very least a website.' (Grant, 2002).

Discussion of the concept of media neutral planning (MNP) emerged in UK as a significant agenda during 2001. In a discussion of MNP and IMC, Fill (2002) suggests that it is time to adopt a comprehensive marketing communications approach (CMC). Grant (2002) offered an alternative view on media categories: Knowledge media, Reality media, Dialogue media, Memetic media, Community media, Story media and Reputation media, arguing that these are more revealing and suggestive of how media can be blended. A panel of practitioners argued that mental, physical and process structures across marketing departments and agencies need to be restructured (Media Week Supplement 2003) and confirmed by the UK's Account Planning Group (Saunders, 2004). Bishop (2002) and Jenkinson and Sain (2004a) suggest on the basis of an IBM experiment that a better model for the marketing communications department is based on customer types rather than communication disciplines.

In the context of charities, this means that to plan and evaluate on the basis of differentiated objectives is sub-optimising. It is no longer adequate to measure and evaluate fundraising direct mail simply on response rates.

Once media and discipline diversity comes into play, the challenge to achieve coherence and harmony increases. It is now recognised that effective integration and planning across media then need a 'strong, organising communications idea'. An example is 'Mini adventure',



**Figure 2.** Leaves from a single delphinium, *Source:* Henri Bortoft, *The Wholeness of Nature* (1996). Reproduced with the permission of the author.

which was successfully used by BMW to launch the new Mini, leading to a variety of executions in each of which there is a very short story, initially involving Mini saving the world and then developing further. An NSPCC example is 'Real children don't bounce back'. According to the global strategy director of OgilvyOne, every successful integrated campaign at Ogilvy has depended on a media neutral idea. The value of such an organising idea is that it provides a creative frame for multiple intelligences to produce a wide variety of communications content and formats that share a common identity, achieving the creative objectives of wholeness outlined above.

In practice, it seems that great communications arise out of an interplay between at least two organising ideas, and often four or five: principally the brand essence, the core positioning, the long-term governing idea that drives the brand's vision of value to customers, the essence of the attraction each customer community has for the brand (needs-satisfiers) and the seasonal, media neutral, creative idea, which keeps its communication youthful and relevant. For example, the NSPCC governing idea, FULL STOP, works in conjunction with the brand values and essence and with a strong organising idea or theme for each milestone.

Just as most music is based on polyphony and its interplay of melody and counterpoint, and most works of imaginative literature on multiple plots and characters, so creative marketing communication also arises out of the drama between ideas. Indeed, Ehrenzweig (1967), an authority on art and creativity, comments that: 'All artistic structure is essentially "polyphonic": it evolves not in a single

line of thought, but in several superimposed strands at once'.

Nevertheless, all ideas should pass through the 'window' of the communications idea. The effect of a strong organising communications idea is both to constrain and direct imagination and to liberate it. A clear identifying idea linked to the brand enables a variety of communication executions to work on harmony rather than just using repetition of image or copy across media to integrate. The principle is illustrated by natural living forms, such as the leaves from a single delphinium shown below, in **Figure 2**.

It is clear that these distinct forms all *belong together*: a single creative identity has formed them. This is characteristic of nature: unity in multiplicity or diversity shows up in the millions of distinctly different trees that can all be recognised as oaks, in the diversity of snowflakes that are still snowflakes and human faces that are still human faces. It is such a creativity, expressing a unifying principle that is the essence of integration in brand management. Thus integration means harmony and variations on a theme. Coherence or integrity replaces mere consistency and repetition.

### ***The NSPCC Milestones***

The NSPCC planning practice demonstrates many aspects of these recommendations. Communication plays a vital role in supporting the NSPCC FULL STOP mission. It has three broad objectives:

1. To educate, with the brief ranging from general information to children and in



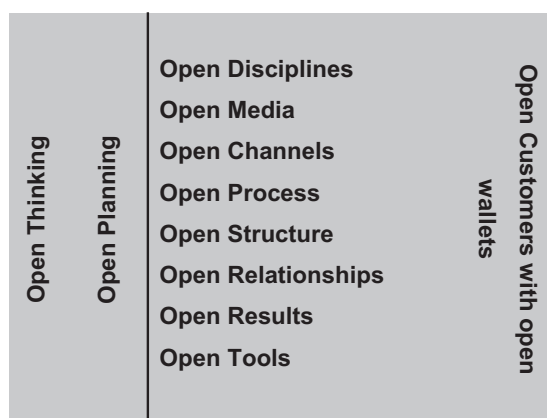


Figure 3. Open planning framework.

- particular, information about their rights to lobbying of political leaders;
2. Fundraising, from small donors to major sponsors;
  3. Drawing on and supporting these, creating a broad climate of awareness and support for the issue and for the NSPCC.

The NSPCC's new chief communications officer (CCO) has freed himself from established practices and assumptions and progressively adopted a media neutral approach since his appointment in 2001. As a member of the MNP Best Practice research group, he became an early adopter of the Open Planning system, which is defined as: 'A rigorous process for the selection of communication options which combines facts and imagination in order to drive continual improvement to overall ROI'. This philosophy uses the framework developed by the MNP best practice group (openplanning.org), illustrated in **Figure 3**.

The Open Planning process is based on five elements:

1. Identify the stakeholder community segment for communication;
2. Plan from the highest strategic levels of brand positioning to the fine detail of a banner, mail pack insert or phone script using a single, standard planning and evaluation framework;
3. Plan, optimise and brief across anything that communicates: charity shop, mail order product, TV, mail, sponsorship, PR, etc.

4. treating each genuinely on its merits in a way that stimulates maximum creativity (every contact point represents a medium) and with agencies working as a team;
4. Recognise that any communications discipline or medium can potentially achieve any type of communications objective;
5. Post-execution, evaluate communication and business effectiveness and efficiency using common currencies, based on the common framework.

The NSPCC Milestones progressively reflect this thinking. They are designed around themes (3–4 a year) that represent steps towards achieving the ultimate goal: ending cruelty to children. The themes are media neutral and can be communicated through the implementation of any discipline in any medium. Each creative solution is designed for the target stakeholder and channels used. The agencies work as a team and actively engage in the implementation of the learning loop. The communications cycle, from theme identification to execution, has been extended to 18 months in order to allow sufficient lead times for execution in all channels, with some flexibility for emerging events, including the impact of and reactions to preceding Milestones. Milestones are co-ordinated and harmonised with fundraising and public policy activities, and the NSPCC is also actively involved in co-ordinating its efforts with other organisations with similar or overlapping agendas.

Each Milestone agenda stems from a broader 5-year communication plan. Each has one communications idea that is informed by internal priorities, input from staff across the organisation and the views of the Campaign Planning Group and Communications Strategy Group.

The NSPCC has been developing the new working relationship with the three main agencies partners, as well as integrating its own internal PR Group into the process. Instead of a pre-defined structure and set of assumptions about what would be done, the briefing for each Milestone is issued to all agencies jointly who then work as a team. The briefing includes any internal party with an

interest in the Milestone. Agencies then meet together to discuss the brief and ideas before a final decision is made.

This aims to remove assumptions about how the brief will be met or even which agency will provide the leading idea. It offers the opportunity for each agency to put forward its best skills and talent. At the same time, the NSPCC CCO is aiming to develop a working team relationship between the NSPCC and the agencies and among the agencies in order to move towards a collective responsibility for achieving success.

The team endeavours to maximise the integration of their communications under each Milestone umbrella:

1. Across channels (media and communications disciplines);
2. Across the NSPCC functions (Fundraising, Public policy, etc);
3. Over time, from Milestone to Milestone and in developing relationship with donors and other stakeholders.

The three-level integration approach allows the NSPCC to apply the principles of harmonious communication while talking to any audience across all touchpoints, using any communications channel over time (Figure 4).

Interagency meetings have become a norm, and their working was observed as co-operative and fully participatory. A typical agency comment is: 'This is going to be the most integrated Milestone so far. Since the Milestone

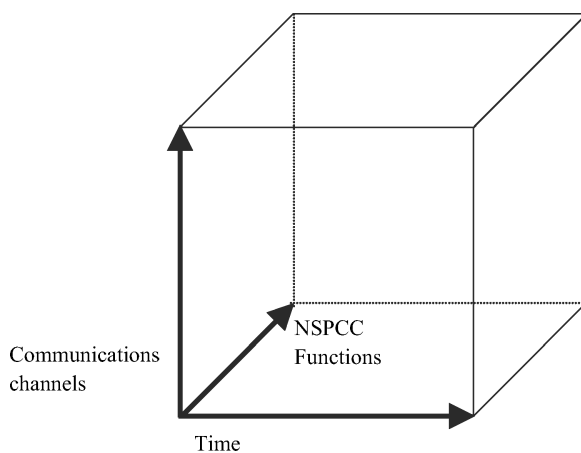


Figure 4. 3-level IMC for the NSPCC.

way of working was launched, we made a huge progress in the direction of IMC'.

Consequently, there have been qualitative and quantitative performance improvements for all stakeholders.

### ***Adopting open planning: recommendations for action***

Adopting Open Planning appears to be a process of both education and change. Each charity organisation would need to find its own route to achieve this, but there are general steps, which can be outlined and are demonstrated by current practice. These are outlined below:

1. CCO commitment: The CCO needs to take action to achieve change. This may include self-education and an audit of current practice as well as the formulation of a series of strategic goals (corresponding to highlights below) and a route plan for achieving them.
2. Progressively adopt structural and skill-based changes: Skills within the team are clearly needed to implement the enhanced approach, principally:
  - Social skills in working together and process and project management skills for implementation;
  - Communication skills: understanding afresh the capabilities of media and disciplines being comfortable with different channels, reflected in use of appropriate tools (see below).

Structural changes recommended include:

- Adoption of a 'team of equals' approach to core agencies. This implies changes in the charity's way of working with the agencies (reflected in contracts, attitudes and processes) and also changes in the agencies in how they see themselves and each other;
- Payment and contract changes: separation of payment for ideas from payment for execution and a significant team-performance element to payment by results;

- Organisation of the charity's communications functions within a process that coordinates all communications for a given stakeholder community. This might be by organising by stakeholder type (not internal function) as IBM did, or by ensuring a mapping of activities within each time period, as the NSPCC does. The aim is to ensure that each recipient perceives coherence across the charity's communications.
3. Adopt an 'Open Tool' planning method integrated into an 'Open Process': The 'Open Tool' method enables all communications of whatever type to be planned and evaluated using a single framework. Characteristics of an open tool are highlighted in **Table 1**. The MNP Best Practice Group nominated CODAR<sup>®</sup> as a benchmark for open tools. It uses a framework of five dimensions to enable each communication activity to be defined, prioritised and evaluated. The NSPCC is trialling this method. Consequently, each Milestone will use the same framework to define objectives, relative priorities and metrics from the overall objectives of the Milestone to the insert in a fundraising direct mail pack. Econometric analysis (the business effects of communication activity) then becomes both more effective and also consistent across all activities ('open results'). A good open tool operationalises best practice concepts.

This is then implemented by integration into an 'open planning process' that briefs each agency and activity, using a common framework for objectives and evaluation, and which begins with an equal opportunity for all agencies/methods to be used. In practice, this means proceeding from an historic set of given assumptions about methods and roles to a more creative platform for innovation. An open process sequence is summarised in **Figure 5**.

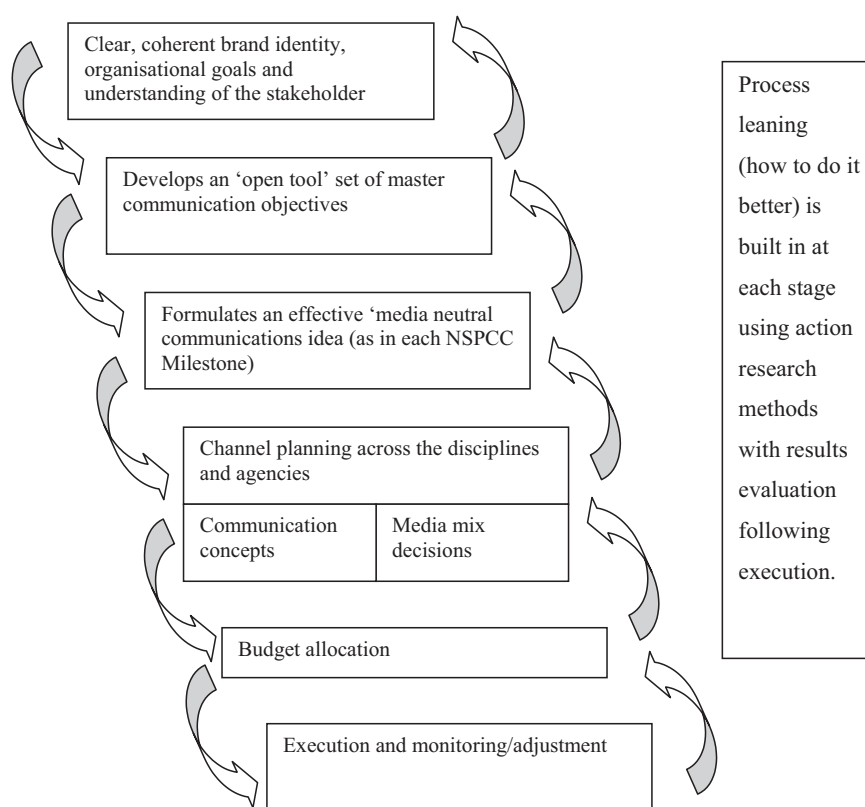
### Conclusion

The paper is based on the experience of many senior marketers, supported by empirical evidence. It makes a number of radical recommendations, but the authors view these as largely codifying existing representative good practice. Clearly, more work in the form of practice evaluation, tools and methods needs to be undertaken. Nevertheless the recommendations involve a new practical philosophy of communication backed up by new behaviours and skills.

The philosophy accepts the commonly accepted core capabilities of media and disciplines but denies that they are limited to these. Instead it argues that any medium can work with any discipline to achieve any communication objective, indeed disciplines can be blended within a communication.

**Table 1.** Characteristics of an effective open tool (Jenkinson, 2004a)

- A single framework for planning and evaluating all communications based on human psychology
- Simple, yet rigorous: enabling profound insights about communication objectives, and how they will contribute to organisational goals
- Providing a clear brief for research that is also easy to translate into a research instrument for planning and evaluation. Ideally it should even work as a research library organisation tool, since research should be accessible according to planning criteria
- Appropriate for all and any stakeholders' interactions with the brand, across all media/Touchpoints in any kind of communication by any skill group. For example, supporting internal briefing for internal communication centres, such as call centres, while also working for the advertising, direct or PR agency
- More precision in the brief yet enabling more 'creatively effective' and efficient solutions
- Adaptable to all kinds of working situation and levels of application. For example, enhancing a conversation in the corridor, a workshop, electronic briefing, econometric database(s), optimisation tools and knowledge management system(s), working both hi-tech and low-tech
- Specifically enabling channel optimisation tools to support planning
- Easy to connect it to existing tools, supporting an upgrade path for current systems
- Enabling a corporate-wide performance database for econometric analysis that provides genuine common currency accountability, learning and insight



**Figure 5.** Open process characteristics.

Furthermore, the scope of communication planning is to all stakeholders and everything that communicates the brand to the stakeholder. These need to be harmonised within themes connected organically to a strong governing idea or vision rooted in the identity and purpose of the charity.

This philosophy is epitomised in certain practices, in particular:

1. Adoption of an open tool that uses a single framework for all communication;
2. A team partnership and shared mission between all internal and external agencies;
3. A process of working together that enables the best solution mix to be developed rather than initially prescribed.

### **Biographical notes**

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Kevin Bishop is Visiting Professor at the Centre for Integrated Marketing at University of Luton Business School. He was educated at Nottingham High School and Emmanuel College, Cambridge from where he obtained an M.A. degree in Natural Sciences and an M.E. degree in Manufacturing Engineering, graduating with first class honours. He joined IBM in 1985 where he was promoted as a Director of Marketing for the UK, Netherlands, Ireland and South Africa. Following IBM acquisition of the PwC Consulting business in October 2002, Kevin was appointed Director of Marketing for IBM Business Consulting Services across EMEA. He has been promoted to EMEA Vice President of Strategy and Marketing for IBM Business Consulting Services in April this year.

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