

## Strategic Thinking in Advertising. A Multidisciplinary Perspective

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**Abstract:** This article seeks to identify the contribution of other disciplines in the work of the account planner in the development of advertising communication strategies, and attempts to answer the question: what sources of knowledge influence the way of thinking of the advertising account planner? For the above, qualitative research of exploratory kind is proposed, in which a bibliographic trace of in-depth interviews to 21 account planners is done in the cities of Bogota, Medellín and Cali. One of the most significant findings is the relevance of account planners undertaking postgraduate studies that allow them to access knowledge from other disciplines so that they can holistically understand the consumer. It was found that this highly creative advertising professional emerged in Colombia empirically, and only from 2006, it is being worked on the construction of the respective epistemology.

**Keywords:** Account planner; strategy; interdisciplinarity; advertising.

### [es] El pensamiento estratégico en la publicidad. Una perspectiva multidisciplinar

**Resumen:** el presente artículo busca identificar el aporte de otras disciplinas en el trabajo del planificador de cuentas en el desarrollo de estrategias de comunicación publicitaria, e intenta dar respuesta a la pregunta: ¿qué fuentes de conocimiento influyen en la forma de pensar del planificador de cuentas publicitario? Para lo anterior, se plantea una investigación cualitativa de corte exploratorio, en donde se hace un rastreo bibliográfico entrevistas en profundidad a 21 planificadores de cuentas de las ciudades de Bogotá, Medellín y Cali. Uno de los hallazgos más significativos es la pertinencia de que los planificadores de cuentas realicen estudios de posgrado que les permitan acceder a conocimientos de otras disciplinas, para que puedan comprender al consumidor de una forma holística. Se encontró que este profesional de la publicidad, altamente creativo, surgió en Colombia de forma empírica, y solo desde el año 2006 se está trabajando en la construcción de la respectiva epistemología.

**Palabras clave:** planificador de cuentas; estrategia; interdisciplinaria; publicidad.

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### 1. Introduction

The interest in understanding how strategic thinking works in the advertising communication process, knowing how the account planner learns and applies his experiences in developing strategies, as well as evidencing the procedure that he

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uses to think about advertising strategies, are topics that the advertising account planner seeks to understand in his day to day exercise. In many account planning departments of advertising agencies, you can find professionals from disciplines such as sociology, psychology, anthropology, business administration, communication, graphic design and, recently, neuroscience, which makes it necessary to investigate what these areas of knowledge have that favour the development of advertising strategies. Today we talk about *marketing* strategy, communication strategy, design strategy, advertising strategy, in the same way, we talk about strategy in sports, politics, economics, board games, effective relationships and people's daily lives. However, it is important to identify a conductive thread that allows recognising the concept of strategy since its origin, its historical evolution and how it took the step to reach the advertising field, as well as the relevance of this knowledge for the development of the strategic thinking of the current account planner.

## 2. The legacy of the strategist to the account planner

We emphasize the aspect that refers to the fact that the strategy was a meeting at which military decisions were made in the collegiate form, that is, it was participatory in nature. We can consider the account planner to be part of meetings where important decisions regarding the present and future of brands are made. In this regard, Álvarez states that:

We know that advertising agencies must mix people of very different styles and with conflicting interests who, despite everything, have to work together, well and quickly. These cultural agents facilitate smooth communication and try to unlock situations, a work that *planners* usually perform (Álvarez, 2012, p. 61).

On the other hand, the military strategist had to have leadership skills that over time he used to teach another military the skills of war. The account planner must be a leader capable of motivating his team:

The *planner* occupies a privilege demarcation to act as the «catalyst of the team», that is, not only as a member that collaborates by making his contribution to the chain of work, but also has the extraordinary ability to motivate and stimulate the other members to give their best, using dialogue, consensus and persuasion (Álvarez, 2012, p. 61).

Leadership and teamwork are some of the characteristics of classical Greece's military strategists and can help to define the skills of account planners.

### 2.1. The advertising strategy

One of the first to associate strategy with advertising was Hopkins, who in 1923 wrote the book *Scientific Advertising* and titled chapter XII «Strategy». While it does not provide a detailed explanation of what an advertising strategy is, it does mention several important aspects. Firstly, when he states that «advertising is very similar to the war, except when it comes to its horrors». And also, if you prefer, to a chess game. «Normally we only have to take the opposing sides or keep their business» (Hopkins, 1980, p. 77), that is, as early as 1923, advertising was associated with military concepts. Secondly, it conceives the strategy as a sum of factors in which the product name, price and competition must work harmoniously, because otherwise, «an error in a part of the strategy can avoid success» (*Op. cit.*, p. 81), Hopkins claims.

Another researcher who contributed to the development of the concept of strategy in advertising was Bogart, a U.S. naval intelligence officer during the Second World War, who after the war devoted himself to journalism. During the 1960s of the twentieth century, he was one of the first professionals to engage in the scientific analysis of the publishing, television, radio and press industry according to the relation between producers of the message and the recipients. Although Bogart did not work in advertising, he had much contact with it because he was the vice president of the *Newspaper Advertising Bureau* in New York. In one of his major books, *Advertising Strategy*, Bogart begins the first two lines of the prologue by saying that «the strategy is the art of distributing the resources available to achieve predetermined goals in the face of active opposition» (Bogart, 1972, p. 13). This vision is important because it locates us in a very particular date for the concept of strategy in advertising. The interesting thing about Bogart is that having military experience, he devotes himself to study the communication. The first version of this book was published in the English language in 1967. What is interesting about Bogart's proposal is what follows the definition:

In a competitive economy, the company's success often depends on its ability to master the advertising strategy. This domain, in turn, depends on the company's ability to gather and apply information. Advertising works today with more information than ever before. In each department and advertising agency of a certain volume, specialists now work systematically developing their knowledge, assumptions and calculations on issues such as consumer purchasing cycle, repetition effects, and the relation between information, attitudes and buying action (Bogart, 1972, p. 13).

What Bogart claimed was the Hopkins' thinking, who decades earlier had defended the importance of scientific advertising. According to Bogart (1972, p. 14), «science can transform judgements previously based on art or intuition». What he ratified was the importance of the research processes that were being developed in advertising and that would allow strategies to be based on evidence and not exclusively on intuition.

However, before Hopkins and Bogart, another author, Prat Gaballí, spoke about scientific advertising in 1917 in his book entitled *A new technique: scientific advertising*. The Barcelona Board of Commerce, now called Chamber of Industry, Commerce and Navigation, organised two courses (1915 and 1917) in which Prat Gaballí taught how to make advertising:

In the first of these, he introduced in Spain the «scientific advertising» that is, that one which following the most modern psychological methods, rational market study, campaigns organisation and creative effort, managed to be effective and provoke the purchase decision in the consumer. The second course was about concrete techniques of mail services and the development of advertising campaigns (Montero, 2010, p. 71).

Prat Gaballí considered important that people working in advertising knew psychological techniques; he studied the leading writings of experimental psychologists from the United States, Germany and France, who had more experience conducting laboratory tests to understand consumer behaviour and the interests of traders.

Another important contribution to the advertising strategy was offered by Leduin the late sixties of the twentieth century, referring to the strategy as the advertising axis, which he defines as «the essential idea that is intended to be conveyed. The *axis* provides all the elements that will serve in the construction of the psychological reality of the product, that is, in its representation in the mind of the audience to which you want to convince» (Leduc, 1986, p. 17). For Leduc, the strategy (or axis) could be established with studies on the motivations of consumer that are based on the psychosociological analyses that allow to interpret and adapt to advertising, the problem that is to be solved.

Advertising involves many of the factors involved in a strategy: there is a scenario (market), several players (companies) participate, there are targets, decisions are made, the competitors' strategy is tried to be figured out, the strategy is applied, the results are expected and actions taken are assessed. The military vision of the strategy was broken in the sixties for advertising «and places the strategy in the scientific field linked to the probability theory. Three have been the determinant factors for this rupture: the definition of measurable objectives, agency philosophies, and the application of the calculations of probabilities to the study of audiences» as mentioned by Alberto Pérez (2001, p. 258).

In this way, the advertising strategy it is assumed as a process that has an aim and a certain risk, as explained by Solanas and Sabaté (2008, p. 191): «planning implies establishing an action plan, developing a method or way of doing, plotting a project that allows meeting a specific purpose». These two authors go further and propose a new way of understanding advertising planning:

Planning is itself a tool that helps to reduce the levels of uncertainty and risk in the company's actions and its present and future operation, because it implies, among other issues, to observe the medium and long term in the decisions made and the consequences or the outcomes of these (Solanas & Sabaté, *Op. cit.*, p. 191).

This vision shows that the strategy will always be accompanied by a minimal component of uncertainty that must be contemplated in the present and the future when making a strategic proposal in advertising.

## 2.2. Planning account in advertising

English advertising agencies of the 1950s had research departments that worked with companies specialising in statistical analysis, but in the 1960s companies began to incorporate their research departments. This change led to the creation of many research agencies with increasingly sophisticated methods and analysis strategies, so that, advertising agencies could not compete.

The figure of the account planner was born in 1965 in London. Pollitt and King, two professionals from the world of advertising, are pioneers in the concept of account planning in the United Kingdom. Lannon and Baskin state Pollitt and King's authorship:

Planning has certainly changed and developed from the planning defined and practised by Stephen King, John Treasure and Stanley Pollitt. A certain amount of change is inevitable, but I think in the process many planners have drifted away from, and lost touch with, their roots, not always to the benefit of themselves, their agencies or their clients (Lannon & Baskin, 2007, p. 4).

Pollitt is considered the father of planners (the position) and was the founder of the prestigious agency Boase Massimi Pollitt, while King, from the J. Walter Thompson agency, is considered the father of planning (the department). It can be said that King invents the planning concept and Pollitt the figure of the planner. What is interesting

is that although these two characters are credited with developing the *planner* concept, who coined the concept of *account planner* was Tony Stead (Lannon & Baskin, 2007, p. 4) during a *brainstorming* sesión at J. Walter Thompson in London in 1968 and where King was present. This concept allowed the integration of *marketing*, media planning and research departments into a single one: general planning. This union of departments raised by King could be influenced by Bernbach's previously cross-departmental unification between editors and art directors, that gave him so much advertising success. But this measure taken by King did not turn out as expected, basically, because the integration of the three departments led the agency to a critical situation in which work did not flow adequately due to the lack of understanding among the participants causing delays in campaign construction, administrative disorders and internal conflicts between the different areas. For instance, media were schematic in their way of working and everything worked around quantitative information; on the contrary, research people did not know how to work as a team, and the account ones improvised and made decisions as the situation required.

Fortunately, King was able to reorganise the way of working and continue offering excellent services to clients. In 1965, when Pollitt was working at the London agency Pritchard Wood & Partners, he realised that there was a high risk that agencies would take the research data and adapt it to the campaigns when the right was the campaigns to be in line with research. This is how he decided to integrate researchers into the teams of the accounting department during the campaign creation process. He applied these first ideas years later when he founded the agency, Boase Massimi Pollitt. As with King, this contribution had the same significance as Bernbach's one when he decided to integrate art directors with editors. Steel refers to this time so inspired by Bernbach's creative revolution claiming that:

[...] what they learned from Bernbach was the value of simplicity, honesty, style, intelligence, humour, respect and consumer participation. The absence of all these things in British advertising previous to the middle sixties had fostered widespread public displeasure with the public and its products. At the forefront of this British creative movement, the agency's creatives met practitioners of a new discipline whose ideals and knowledge formed with theirs a perfect combination. This discipline was named account planning (Steel, 2000, p. 1).

It can be said that with the creative revolution proposed by Bernbach there was «the triumph of a new model of advertising agency specialised in communicative strategy and creation» (Eguizábal, 2009, p. 279). When Boase Massimi Pollitt was founded in 1968, Pollitt joined an account manager with an account planner. Pollitt referred to this new planner as «account man's conscience» (Lannon & Baskin, 2007, p. 15). This new professional should be a person capable of becoming an expert in investigation relying on interviews and data that would allow him to understand the consumer's needs, because:

[...] there is no doubt that other reasons that drove the emergence of the *planning*, converged. The consumer was experimenting with deep changes throughout the 1960s. Broad-base movements answered the model of society based on consumerism and chain production, seen up to that point as an expression of prosperity. Advertising techniques themselves were beginning to produce public fatigue and to be the subject of intense debate (Álvarez, 2012, p. 31).

This new specialist was in a way part of the team with the creative and the account manager. In addition, because creativity is affected by the individual environment «The individuals' self-construction influences their behaviour across the different social domains in which they reside» (Roca, Wilson, Barrios & Muñoz-Sánchez, 2017, p. 834). The account planner should present the route to be followed by the campaign, not just presenting statistical data. The data had to be interpreted and translated into an advertising language that would guide the creative path and according to the customer's *marketing* objectives. When the new agency Boase Massimi Pollitt was formed, Stanley Pollitt was the account planner, whereas Martin Boase was the account executive and Gabe Massimi, the creative.

### 2.3. The interdisciplinarity

To understand the concept of interdisciplinarity, we need to briefly differentiate the concepts of multidisciplinary, interdisciplinarity and transdisciplinarity. For the above, we will rely on the descriptions made by Bernal about these three aspects. For Bernal, multidisciplinary is a dialogue «where each discipline is kept within its approach, methods, categories and speciality, without more commitment than to present its point of view on a subject» (Bernal, 2006, p. 49). On the other hand, interdisciplinarity is not limited to exposing a point of view but seeks «a certain reason for unity, relationships and reciprocal actions, and interpretations between various branches of knowledge» (Bernal, *Ibidem*). Transdisciplinarity seeks to transcend by «integrating a knowledge that generates an ability superior to the existing one or a new science or scientific discipline» (Bernal, *Op. cit.*, p. 50).

With the above, we consider appropriate to refer to interdisciplinarity as a way of understanding the relationships established by the different disciplines around the concept of strategy. Also, interdisciplinarity allows dialogue with other disciplines on how those interpret, adopt or hybridise the concept of strategy with their respective fields of knowledge. These disciplines which study the individual alone or in a group and that is framed in a social reality can provide information that allows advertising campaigns to effectively target the consumer. Maslak makes a



comparison between strategy and Eastern martial arts, where he talks about the master strategist in this way: «even before blocking the first kick, he plans how to use his physical advantages with the greatest effectiveness against the opponent's disadvantages. That is, he plans the action process, reaction and new action» (Pater, 1994, p. 191). This comparison, which is not so far removed from the account planner's reality, shows how the strategy can leverage any knowledge to differentiate itself

Versatility, ongoing communication and research training make account planners prepared to offer customers, appropriate solutions for communication needs, because the deeper you get into the strategic work, the more necessary it is to have professionals who in addition to thinking and researching, know the process of persuasive communication very well. All this was exposed from the *management* by Ansoff, one of the first to adapt the concept of strategy to *management* and whom we talked about earlier. In his 1979 book *Strategic Management*, he writes:

This theoretical elaboration has been the most important phase of my intellectual development. In search of a theory that faithfully reflected in reality, I was forced to recognise that my previous training in rational analysis of business activities had been inadequate and that a multidisciplinary perspective was essential. So, I begged, borrowed from or stole concepts and theoretical perspectives to psychology, sociology and political science. And tried to integrate all of this into a holistic explanation of strategic behaviours (Clutterbuck & Crainer, 1991, p. 209).

Possibly what Ansoff did was gather the positions, rules and methods of different disciplines into a multidisciplinary exercise, and then integrate them and obtain an interdisciplinary result. Something similar happened to Mintzberg, who from the *management* also claimed that:

[...] during the twenty-five years from the date of the first publication of *Corporate Strategy*, I had made progress towards a broader perspective, comprising both economic rationality and psychology, sociology and politics. All of them are necessary to understand the world of modern organisations and their behaviour (Clutterbuck & Crainer, 1991, p. 203).

The above suggests that the strategy must be based on other knowledge disciplines to be more relevant to advertising. Innovative strategic ideas only arise from leveraging the mental capabilities of each account planner with regard to this matter, we can recall Ricaurte's words when he states that «creative thinking seeks to establish relationships between the different and innumerable units of information that our brain perceives» (Ricarte, 1998, p. 29) mentioning some disciplines involved in strategic thinking.

#### 2.4. From insight to consumer insight

The word *insight* is an English term that originates from the German word *einsicht* and was developed in the Gestalt theories. Currently, it is frequently used in the advertising field to refer to aspects related to deeper consumer perceptions. The studies of the beginnings of the term can be traced back to the experiments carried out by psychologist Köhler (Köhler, 1989) in which it is explained that *insight* «is born of a new understanding of relationships that occur immediately and unexpectedly» (Galimberti, 2002, p. 615). This concept was taken from Gestalt to refer to the intuitive and imaginative solution to problems. However, it is in the psychoanalysis that its applicability can be found.

Psychoanalysis, on the other hand, distinguishes two types of *insight*: «Intellectual *insight*, which is the ability to rationally understand the own psychic attitudes, and emotional *insight*, which involves effective participation» (Galimberti, *Ibidem*). For psychiatry, there is talk about «the lack of *insight* when the individual does not have the feeling of being ill despite the evidence of symptoms» (Galimberti, *Ibidem*). On the other hand, for Romo, «emotion accompanies the *insights* that are truly creators, which constitute the finding of what we were looking for» (Romo, 1997, p. 53). This complex concept attempts to describe a perceptual process that refers to the intuitive understanding of a phenomenon. This understanding is determined by the internal experiences accumulated by the individual throughout life. In her doctoral dissertation, Balanzó takes a complete tour of the different meanings of the term *insight* and relates it to advertising:

In the field of account planning, it is not consumers who come to the *insight*, but the observers: marketing professionals, researchers and account planners discover and subsequently build this insight from what consumers express through observation and existing data (Balanzó, 2011, p. 43).

Later in her dissertation, the author develops the *consumer insight* concept, considering it essential for the design of strategies in advertising and marketing, since as she mentions: «will be the factor that evaluates the success of both brands and companies in addition to being the true value and differential of the market research itself» (Balanzó, *Op. cit.*, 60). This adaptation of the term arose when advertising communication began to use it «to refer at first to the consumer, thus the 'consumer insight' was born, a concept that has become the undisputed protagonist of the communication strategies worldwide» (Espantaleón, 2012, p. 46).

This is why we consider relevant for any account or advertising planner to approach the sources to have clarity of this concept in all its scale. This knowledge is likely to allow advertising to obtain what is known as inspiring *insight*, helping creatives, account executives, media planners, advertisers, and so on, to achieve effective results for brands. Therefore, what is known as *consumer insight* arises, which refers to a consumer understanding to meet their needs or as explained by Stone, Bond and Foss:

[...] insight doesn't just happen [...] It's the result of different disciplines – particularly market research and customer database analysis – being combined and used to manage consumers, and to allow consumers to manage themselves because the insight has been used to develop ways to allow them to do it (Stone *et al.*, 2004, p. XII).

The above invites us to understand that the term *insight* originates in another discipline and that advertising has adopted and adapted it to explain a phenomenon presented in the consumer. The interesting thing is to understand that *consumer insight* is a very different term from the *insight* one that is usually used in advertising. Some definitions of *consumer insight* are:

Consumer insight is the knowledge of the target that is particularly effective to create a relationship with it. An insight is a fresh and non-obvious understanding of customer's beliefs, values, habits, desires, motives, emotions or needs that can become the foundation for a competitive advantage. Is an in-depth knowledge of the *target* to which we are heading to (Espantaleón, *Op. cit.*, p. 46-7).

In the Colombian advertising context, who have more clarity about the concept are those account planners with an academic background as psychologists. This is evidenced by Juan David Franco, psychologist and current vice-president of strategic planning at Leo Burnett Colombia.

From psychology, some authors develop the concept of *insight*, so we consider relevant for any account or advertising planner to approach these sources to obtain more clarity of this concept in all its scale. Alongside the *consumer insight* term, new concepts have emerged, such as, «*insight branding*, *communication insight*, *category insight*, *product insight*, *insight in media*, etc.» (Espantaleón, *Op. cit.*, p. 47). This knowledge is likely to allow the account planner to obtain inspiring *insight* that helps creatives, account executives, media planners, advertisers and so on, to achieve effective results for brands. Finally, Muñoz considers that:

Nowadays, the advertising business is likely to use terms such as concept, idea, *insight*, etc. in such a natural way that its ignorance is unthinkable. However, it may occur that this very naturalness with which these expressions are handled its what leads to is not deepening of its origin, even worse, its meaning is unknown. Sometimes, terms come into advertising and we adopt them as a trend, as something that the industry accepts and incorporates immediately. This phenomenon is known as *buzz words*, words that are adopted from other disciplines and incorporated into the advertising vocabulary.

This adoption leads on many occasions to generating resistance towards this new terminology. In the case of the term *insight*, which has commonly been used incorrectly in advertising because it is a therapeutic term of psychoanalysis, it is convenient to use the term *consumer insight*, which refers to adapting the term from another discipline but integrating characteristics of marketing and advertising. The above it is proposed as a respectful way of using a borrowed term that helps to explain a phenomenon typical of advertising (Muñoz-Sánchez, 2015, p. 113).

It is clear then that the term *insight* originates in another discipline and from there we must understand it to make a correct interpretation of its use. If not, at least, advertising must publicly recognise where it originates and how it adapts to advertising.

## 2.5. Neuroscience and its relation to advertising

### 2.5.1. Neuroscience

Neuroscience is the discipline that studies the different elements and functions of the nervous system from a multidisciplinary point of view. This study can range from molecular to psychological. Understanding what happens in the human brain is one of the interests of modern science and one of the mysteries that leads us to try to find out how the advertising account planner's brain works. The first is to know some conceptual foundations that help us to understand a bit better how mental processes of the account planner are organised on his mind. The second is to remember that mental operations are done in the brain, an organ that weighs approximately 350 grams when a child is born, and that can weight up to 1.400 grams between the ages of 25 and 30 years old in the adulthood. Understanding the human brain requires interdisciplinary work between neuroanatomy, neurophysiology, neuropharmacology, neurochemistry, etc. Neuroscience understood, between 1950 and 1960, that it had to accept «the importance of joining efforts to achieve a common objective: to better understand how we perceive, learn, remember, think, feel» (Álvarez & Trápaga, 2008, p. 25). While understanding the functioning of the brain it is the object of study of neuroscience, it cannot be forgotten that the brain

is part of the human being who in addition to being biological, is also a social being. Is here that disciplines such as psychology, anthropology, sociology, etc. serve as interdisciplinary connectors for the integration of apparent opposites (biological and social). At this point, we would like to clarify that advertising wants to be another discipline that allows us to understand another dimension of the individual in contact with the world it is around them: that of consumption. This dimension of consumption is not the same in human beings, there are differences in decision making between men and women that may be influenced, by physiological factors, among many other aspects. Many studies evidence both physiological and psychological brain differences between men and women. In women for instance:

More fibres bind the hypothalamus to the cerebral cortex than fibres from the cerebral cortex to the hypothalamus (centre of emotions). For this reason, much of the decisions we make are more emotional than rational, as the stimulus (whether visual, auditory or sensory) first come to the hypothalamus and take a few thousandths of seconds to reach the cerebral cortex, these thousandths of second, can be the difference between giving a fully emotional response (either of aggressiveness, sadness, etc.), or a more rational one, in which we think real possibilities of solution as well as logic. This does not mean that there is no emotion in the response but it will be more rational (Rodríguez, 2005, p. 77).

Neuroscience with the help of specialised technology such as functional magnetic resonance imaging (fMRI) helps the advertising to understand how individuals (consumers) think, act and make decisions. But also, and is the case that concerns us, it allows to understand how a human being thinks, act and make decisions in the account planner role. If on the one hand, neuroscience agrees that «anatomical connections between neurons develop according to a defined plan, their power and effectiveness are not predetermined and can be altered by experience» (Álvarez & Trápaga, *Op. cit.*, p. 27). The above allows us to think that the mental processes, in our case, those of the planner, can be modified.

## 2.6. Strategic thinking, branding and its relationship with the human brain

Mental processes and in particular mental associations originate in the human brain. In James' words:

All materials of our thinking are due to the way that one of the elemental processes of the brain hemispheres tends to excite any other elemental process that has excited it in some previous time. The number of elementary processes in operation and their nature at a certain time have full effectiveness in awakening others, to determine the character of the total brain action, and, as a result, the object in mind at that time. Since this resulting object is one or the other, we call it the product of association by contiguity or association by similarity, or contrast or in any other way that we have been able to recognise as last (James, 1989, p. 452).

The important advances in medicine in the field of neurology, allow understanding the functioning of neurons in various processes of human life. Better yet, they help to understand the human brain, because according to Pinker:

In this scientific time, «to understand» means making an attempt to explain behaviour as a complex interaction among 1) genes, 2) brain anatomy, 3) its biochemical status, 4) family education received by a person, 5) the way in which society has treated it and 6) the stimulus that affect it (Pinker, 1997, p. 78).

Economics, marketing and advertising are also taking advantage of this knowledge to understand consumer processes when making economic or commercial decisions. In these processes, the main protagonist is the human brain, the place where mental processes develop and that brands want to occupy, because as they have reminded us for decades, Ries and Trout, «positioning is not about creating something new and different but manipulating what is already in mind; reorganise existing connections» (Ries & Trout, 1989, p. 1).

When a brand is born, it aspires to do so in the consumer's brain, it will try to remain itself in a lasting way. In Torres I Prat's words, a brand «is a «trojan virus» installed in our brain: as a trojan virus, brands suck our psychic energy and information towards the «network server», that is, towards The Corporation or collective advertiser» (Torres I Prat, 2005, p. 62-3). Every novelty generates new relationships, this is how the new brand makes possible to create new connections between neurons, and if these interactions are strengthened, the construction of a brand will be consolidated, or on the contrary in a short time it will cease to be remembered or even takes the risk to be forgotten, as explained by Ratey: «if neuronal circuits are not exercised, the connections will not be adaptive and will slowly weaken, and may become lost» (Ratey, 2002, p. 46). Although mental constructions are subjective because they belong to each individual, several conditions activating similar areas of the brain can occur in the brain of several people; this is explained by Braidot when he states that:

A customer that has had contact with a product or service, recognise it in the hippocampus, which the brain area that registers and remembers simple data. If, as a result of successive contacts, an emotional link has been created with that product or the brand that identifies it, this is registered in the amygdala (Braidot, 2005, p. 372).

Brands make an impact on the brain as they involve the emotional and rational aspects of the individual. Through studies of fMRI (functional magnetic resonance imaging), it has been established that brand knowledge can have effects on neuronal connections that generate memory and decision-making processes. That is why when an individual recognises a brand, the region of the hippocampus where memory is located and the area of the prefrontal cortex associated with emotions are activated, each time this area is activated in relation with the brand, it becomes more indelible or put in another way, it lasts longer. The explanation for this may be given, to the extent that the prefrontal zone appears to be directly related to the kind of person we are, that is, the activation of this zone «reflects the connection between brand and customer's self-image» (Braidot, *Op. cit.*, 449). This is important for advertisers and marketing professionals because, to the extent that it is known how the brain reacts to brands, it is possible that innovative strategies can be developed.

The same happens with the amygdala, a small organ that is in the brain and where many emotional memories are stored of which human being is not conscious. The communication strategy seeks to retrieve information through communication messages that activate and stimulate emotions allowing to generate a link with the brand.

Because of this, Schmitt takes the marketing process of experience to the neurological level by stating that: «The idea that there are different functional areas in the brain, which correspond to different experiences has been called «modular vision of the mind» (Schmitt, 1999, p. 81). The above means that the mind is composed of functional parts, each with structures and processes joined together, that cannot be separated. This is how, sensation, cognition and affection «have their structures and principles even though they interact to produce coherent sensory perception, feeling and thought» (Schmitt, *Op. cit.*, p. 82). Therefore, when communication wishes to appeal to the senses, it is recommended to develop strategies for each of them. As Schmitt describes:

No matter what and how you experience it: it is always about nerve cells forming connections between information by transmitting chemical and electrical impulses. However, as the phenomenology of the experience, there are several distinct functional areas. Firstly, there is a perceptual or sensory system located in the thalamus. This system processes sensory input in the form of light waves, sound waves, touch and textile information that reaches the retina, ear and other sensory organs. Then there is a limbic affective system in a nearby region called cerebellar amygdala and also in the neocortex.

The «lower systems» of the limbic system and the cerebellar amygdala, produce a rapid «visceral» affective response without too much thought or analysis, while the neocortex can produce more complex emotions. Finally, other parts of the neocortex are the headquarters of elaborate cognition and thought and of creativity (Schmitt, *Op. cit.*, p. 81).

Strategies for experience marketing, for instance, should be addressed from the Strategic Experiential Modules (SEMs) composed by five types of experiences that Schmitt divides as follows: sensations, feelings, thoughts, performances and relationships. Sensations refer to sensory experiences captured through the five senses; feelings, to the internal emotions of the individual that allow generating affective experiences and that are closely linked to the mood; thoughts seek to generate experience from the intellectual aspect; performances try to stimulate experiences from lifestyles; and relationships extend to the social and to the interaction with other individuals. In this regard, Lindstrom states: «Companies have begun to discover that to achieve our full emotional commitment, they must not overwhelm us with logos but bombard fragrances in our noses and music in our ears» (Lindstrom, 2009, p. 159).

The brain unconsciously selects the brand which it has lived and which has demonstrated it that can meet its basic needs, the one that produces wellbeing and pleasure, because the human being, by nature, rejects everything that produces pain or dissatisfaction. This satisfaction provided by the brand creates a connection between our targets and neuronal networks generating an electrochemical substance called dopamine, which when generated, provides wellbeing. When this process occurs steadily, the brain recognises that such a brand satisfies the individual's aims. That is why experts in marketing recommend using the repetition strategy because it generates enjoyable experiences. But the most interesting is that the brain selects the brand that has been leaving the most pleasant intense experiences cumulatively and that has generated new neuronal connections associated with each new experience, which benefits a more favourable predisposition towards the brand and facilitates its appearance in the consumer mind. If advertising understands how human mind works, is possible that develops strategies and advertising pieces that stand out within the ads that daily saturate consumer attention, because in Braidot's words:

[...] The proper creative strategy to build a link with the brand is the one that highlights for its ability to appeal to the rich effective world of customers based on the understanding of the mechanisms that trigger feelings, sensations, desires, motivations and attitudes (Braidot, *Op. cit.*, p. 654).

What Braidot exposes is the importance of emotions in the customer purchasing decision, where «accurate brain knowledge plays the key role in explaining consumption decisions» (Balanzó & Sabaté, 2007, p. 49) as explained by Balanzó and Sabaté. The above evidence that there is still much to be discovered about the relationship between our brain and its application in the communication strategies.



## 2.7. Neuroscience and advertising

Camargo explains that in the late 20th and early 21st century, science is going to go from being neuro-centric to being more brain-centric, meaning that the brain is the centre of attention of the research around the world (Camargo, 2009, p. 49) In this regard, Goldberg considers that:

The Human brain is the most complex natural system, in the known universe; its complexity rivals with, and probably overcomes, the complexity of the most intricate social and economic structures. It is the new frontier of science. The 1990s were declared the decade of the brain by National Health Institutes. Likewise, the first half of the twentieth century was the age of physics, the second half of the twentieth century was the age of biology, at the beginning of the 21st century is the age of brain-mind science (Goldberg, 2008, p. 47).

Advertising's interest in understanding how the brain works in the advertising communication processes, arose when in 2003, neuroscience specialist Montague (2004, pp. 379-387) undertook the same Pepsi Challenge experiment that was conducted originally in 1975. On that occasion, the taste test sought to confront Pepsi and Coca-Cola for the consumer to take a blind test and determine which one was their drink of preference. The test was carried out in supermarkets and points of sale featuring two glasses, one containing Pepsi, and the other Coca-Cola, and with the bottles at the consumer sight but hidden by cylinders that prevented them to see the label and the shape of the bottle. In 1975, the experiment resulted in a clear preference for the Pepsi taste by consumers, which provided powerful arguments for the company to conduct advertising campaigns supported in the test results. Although the results evidenced that consumers preferred Pepsi, the truth was that Coca-Cola was the leader in sales. How could this be? This dilemma was what led Montague to undertake a retest in 2003, only that in that year he relied on neuroscientific techniques to understand what was going on in the brain of consumers. Montague's experiment and the neuroscientific contributions of psychologist Zalmman to marketing in the middle 90s are allowing publicists to understand that disciplines such as neuroscience and cognitive psychology can provide knowledge that helps them understand how the brain and mind of consumers work in some decision making processes in term of brands. In 2002, psychologist Kahneman received the Nobel Prize in Economics for his advances in neuroeconomics. Kahneman's contributions allowed marketing and advertising to use the contributions of these new disciplines in brand research. At first, neuroeconomics began to question the traditional methods used by economics, especially those referring to consumer behaviour. In these processes, the main protagonist is the human brain, the place where the mental processes that relate to brands are developed. To understand individuals, it is necessary to bear in mind that human thought consists of symbolic constructions or exchange of symbols (words, gestures, drawings, sounds, objects, etc.) that give meaning to the experience. (p. 256)

## 3. Methodology

For this work an analytical-interpretative research of exploratory kind it was proposed with the purpose of demonstrating whether there is information that explains the level of knowledge that the Colombian account planner has about the concept of strategy in its historical, disciplinary, multidisciplinary and cognitive dimensions, and assess whether this information is relevant to his daily work with brands.

Accordingly, the research was oriented towards the analysis of the account planner's mind and the relationship with the development of advertising strategies. The study seeks to answer, among others, the following question: what other sources of knowledge influence the way the advertising account planner thinks? Based on this question, we consider ourselves as the main objective to identify the characteristics that make up the strategic thinking in the figure of the account planner. This led us to identify specific objectives such as: establishing the strategic thinking characteristics of the account planner; secondly, knowing the contribution of disciplines such as cognitive psychology and neuroscience in the development of the strategic thinking of the account planner and thirdly, comparing the theoretical basis of account planning with the practical reality of the account planner in advertising agencies.

Once the objectives have been set, we delimit research by considering this issue as important and necessary for Colombian advertising because it provides theoretical bases, so far scarce, that serve as a matter of reflection and action on the work of the account planner, understanding his own work and the possible way of enhancing his skills. For the above, research is supported by the contributions of different authors and disciplines that have helped to build a theoretical framework for understanding the human mind.

## 4. Analysis of the findings

One of the main protagonists of strategic planning, Juan Luis Isaza, Strategic Planning & Social Media VP at DDB Latina in Miami, tells us from his experience how he started this profile in Colombia:

Setting a specific moment is very complex because it's not something such as setting up an agency or the entrance to work of a particular person, which would make it easier to place in time. For a long time, there were account managers or research directors at some agencies who possibly alternated their degree with that of «planning manager». There are two agencies that I think had a great track record in incorporating planning skills, although sometimes the title was not so clear. These are McCann and Sancho. The latter had (and I think it still has) a very robust research department, with which there was a generation of in-house consumer knowledge. This makes it particularly close to the planning theme.

I once heard that Ricardo Silva, who worked at McCann, and years later as DDB manager in Bogota, had the position of Director of Planning at McCann. This was surely in the 90s. But it is quite possible that alongside with the Planning position, he had also some another title, as I had said before. Similar to what happened with Marcelo Arango, from Sancho, whom I first met in 2000. His title was Vice president of Accounts. But his work was clearly that of a planner. This title he did not have it until a few years later. In my case, I arrived at DDB Colombia in 2003 after studying a master's degree abroad. When arriving, my position was the planning director.

Another insight into the origin of account planning in Colombia is explained by Maria Alejandra Urbina, Latam Director of Planning and Strategy at MullenLowe/SSP3 and who studied with Merry Basking, who in turn learned directly from Stephen King:

I started my work in advertising in 1990 in the area of accounts in local agencies. In 1994, I started at JWT as the Ford Motors' account executive and in 1998 I did an internship at JWT London in the area of planning with Merry Baskin. On my return to Colombia, I started my job as an account manager. In 2000, I moved to Medellín (Colombia) to the Y&R office as an account manager and planning director for all clients in the office. Then in 2003, after a term in Australia, I returned to Y&R as General Director of Planning for Y&R Brands Colombia. That was when I started my work 100% in the area of planning. Since then I have been at Y&R (2003-2007), Ogilvy (2008-2010) and MullenLowe SSP3 (2010-current). In 2011, my responsibility for the region began.

One of the most interesting things about this research was discovering how many strategic planning professionals came to this position from many different areas or complementary to advertising and the functions must perform. The main functions performed by the account planner can be divided into two types: those that refer to a more operational task and those that involve cognitive processes. With regard to the former, the work of the account planner consists of developing strategies that help to optimally solve the communication needs of brands by focusing on the consumer, that is, it must understand it through processes and research techniques such as ethnography, observation, *focus group*, interviews, surveys, etc.; collect and analyse database information; make workshops with advertisers, and tools and formats of the agency. On the other hand, cognitive functions refer to the searching and finding of connectors, *insights*, ideas or inspirators that can arise from the consumer, the brand or the environment. For Miguel Dallos, Jesús Acosta and Carlos A. Montaña, the account planner can never lose sight that his work must contribute to generating results because they have clear that advertising is a business that must help brands; is for the above that their conceptual or creative findings should help creatives so that their ideas contribute to selling. Other points of view are offered by Inés Elvira Umaña, Carolina Echeverry, Carolina Rubiano, Pablo Trujillo, Jorge Becerra and Felipe Serrano, who consider that the findings or *insights* should inspire creatives to achieve advertising renown of brands.

In any case, the account planner considers that his task consists of guiding brand strategies, having consumer as the main axis. For interviewees, it is clear that the account planner at the advertising agency is an added value for brands looking to differentiate therefore communication issues. In Jesús Acosta's words: «The planner is an added value given to the customer because it helps in the reference of advertising pieces, competitor analysis and transcending *copy analysis*».

Numerous planners began their career in activities other than account planner. Some started first as advertising editors, art directors, designers, account executives or market researchers. Over time and after learning about the functions of the account planner performed by their colleagues performed, they became interested in this professional profile. Such particularity relates to the agreement that accounts planning departments were established in the middle of the first decade of the 21st century in Colombia, between 2004 and 2006. In the case of Inés Elvira Umaña, you can see how in 2001 there was no planning department at Leo Burnett Colombia and it would be until 2006 that the account planner position would be created. She, in particular, began her career at this agency as an account executive and only until 2006 she was offered the opportunity to create the new department along with who was her immediate boss, María Angélica Palacios (Keka), who had a wide, recognised and highly awarded career as a creative.

From the information provided by Dallos, we highlight the following important date and data: by the year 2000, the account planner position is already set up at BBDO Guatemala. This is a piece of interesting information considering that in the United Kingdom it emerged in the middle sixties, in Spain in the early 90s, and in Colombia, it began to be heard loudly between 2004 and 2006. The truth is that nearly all interviewees started in tasks other than account planners and eventually ended up developing strategies. The only interviewees that began working as account planners were Juan Camilo Trujillo and Alejandro Zapata, who began as interns when this profile began to be made known.

#### 4.1. Use of the term advertising strategy

Generally speaking, account planners do not know why the term strategy is used in advertising. For some, this knowledge of the strategy concept and its relationship with the military may obey to the use of their professional background as business administrators, a discipline that traditionally associates business with war. Dallos explains it like this: «Advertising originates in competition, and competing assumes that several want to get to the same place, it is a war». Serrano, on the other hand, relates the term to the popular strategy game *Risk*, and Gómez is a bit more explicit and mentions Sun Tzu as an important theoretical reference; that is how he explains it:

When I read Sun Tzu everything fit in spectacularly, I saw it clear and did not waste any more time. Everything he raised in his speech, he did it from the military and for me, it was easy to make the analogy with advertising. I found that there were things in common: objectives, enemies, competition, situations, tools, etc.

Acosta offers a more philosophical point of view and states that the term strategy is used in advertising «because this is a business and the market is a great battle scenario, it is like an agonic game where there are winners and losers».

#### 4.2. Ability to inspire

The account planner knows that his responsibility towards the agency consists of collecting and analysing information about the consumer, brand and market to provide information to advertising creatives that inspire them to have innovative, distinctive, memorable and effective ideas. But, he should also inspire his team of accounts, media, production, etc. and, of course, the customer. The account planner should be very creative in searching and finding *insight* and in the way he designs the strategy. In Juan Camilo Trujillo's words, «the task of a *planner* is to enlarge the creative work».

It is clear that the account planner does not seek to be the protagonist during the work process; he intends to help creatives make the best use of their abilities. His intelligence focuses on obtaining results. It masters the information very well, is updated on trends and strategies applied around the world. The best account planners have the ability to be respected and admired by the creatives, precisely because of the ability to inspire them throughout the work team. This credibility from the work team is built on the credentials of the brands they have managed, the good ideas they propose and the results obtained, and by the large or small actions that have shown relevant contributions in terms of what was designed as the strategy.

#### 4.3. As for the planner, the formats and the interdisciplinarity

For account planners, there are no procedures, steps, instructions, recipes or formulas for making strategies in advertising. You can tell that there are common ways of working, ways of looking for similar information, but there are no formulas that dictate how to make a strategy because the analysis of that information is the personal imprint that each account planner gives to the strategy. The way of thinking of each individual is like their fingerprint, unique and unrepeatable. For Echeverry, «strategic thinking does not have a single form. There is no formula, each *planner* prints his personality». Miguel Dallos also shares this point of view when states: «I don't know how to teach others what I do». Each strategy is unique because of the characteristics of the individual generating it, the brand identity, type of customer, variables of the environment and consumer insight. This causes the strategic thinking process to change significantly at every moment. The formats help to organise the information within the agency and put all departments of the agency into speaking the same language, but they do not unify thought. Jesús Acosta considers that: «regardless of the agency, all formats talk about the market, the consumer and the brand. That is the formula for any strategy. Another item, the category, could emerge». These are the common points in the format of any advertising agency, which does not mean that all strategies are the same. Inés Elvira Umaña considers that «there are certain steps that help to organise yourself mentally. But, there is nothing to tell you how to get that idea creatively». In short, each thought and each strategy is a different point, because they are thought by human beings who are unique.

### 5. Conclusions

The figure of the account planner does arise as a result of a historical factor by which advertising, like competition games, *management* and communication, is compared to war and as such must learn to master the terms, strategies, tactics and the way of thinking typical of this kind of confrontation. The most interesting contribution is the one developed by Clístenes (570 b. C.-507 b. C.) in Athens when he forms a collegiate body integrated by ten leaders (see section 1.1.5.). It is worth analysing whether this concept is, or could be, applied in the strategic planning meetings of advertising agencies.

In Colombia, the account planner unclear about the historical origin of the strategy concept. Very few associate it to the military field and, in general, do not know the reasons that led the concept to move from the military to the advertising. They also have do not know the characteristics and differences between a strategy posed by a publicist, a marketing person, a communicator or a graphic designer. This may make interdisciplinary work very difficult because when addressing the strategy, each of the aforementioned disciplines may consider that the strategy corresponds to its field of knowledge and may be unaware of the insight that other areas have of it.

Therefore, we consider important that the account planner knows the concepts that allow integrating, as well as those that distance the different disciplines against the concept of strategy. This recognition will allow him to establish interdisciplinary dialogues in which respect, tolerance and teamwork prevail for the benefit of consumers, brands, advertisers, agencies and strategy professionals.

Advertising has taken on concepts that have their origins in the field of military, *management* and psychology. The word *brief* is of military origin and was a document detailing operation the instructions of a war operation. The concept of the strategic triangle (environment-organisation-customer), proposed by Ohmae, is used by account planners to build advertising strategies for brands but adapted to the advertising language (market-brand-consumer). On the other hand, the *insight* concept originates in psychology and relates to the ability of the individual to reflect on himself. Knowing the origin of these and many other concepts will help the account planner to understand, explain and apply them optimally.

Cognitive sciences and interdisciplinary work will establish conceptual bridges that help increase the understanding of mental phenomena involved in the development of advertising strategies. The challenge for the account planner begins with receiving training in this area. Although he is currently aware of the importance of other disciplines in his daily work, he must still take an important step in terms of training and education through talks, courses, conferences, workshops, seminars, congresses, postgraduates, etc., that allows him to have more conceptual tools to know himself, advertisers and consumers.

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