
How to Win with Customers

Integrated Marketing and its effectiveness

An exclusive report on Integrated Marketing Performance in the UK

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**Centre for
Integrated
Marketing**

The Centre for Integrated Marketing has been funded to research best practice and develop intellectual and other tools on behalf of leading marketers and their agencies.

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Integrated Marketing is a holistic discipline that involves the whole organisation in developing congruent, sustainable and high-value brand experience for all stakeholders.

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For further information and case studies, visit the Centre website on
www.IntegratedMarketing.org.uk

This report outlines the results of an 18 month study into Integrated Marketing performance in the UK and outlines key diagnostics for the CEO and marketing leaders to address. Participants in the research project also receive a personalised benchmark report of their scores. The research shows that UK business has very significant opportunities to improve and outlines how this can be achieved. Five measures of customer experience are identified as well as six key drivers for improvement.

Companies that manage the key indicators more effectively get higher customer experiences and better business performance. Only around one in ten companies or brands is really performing well at this. Most are clustered in the “mediocre” category. (Companies don’t survive long in the even poorer sub-mediocre category.)

Background

The Centre for Integrated Marketing has for three years been the UK’s foremost research authority on Integrated Marketing, with a mission to provide senior marketers and agencies with tools and insights for efficient and effective implementation of Integrated Marketing.

Integrated Marketing is widely recognised as crucial to future success in marketing and is therefore the benchmark for marketing leadership. To support its mission, the Centre carried out in-depth studies of over thirty leading UK brands. It also engaged in a number of insight and tool development projects in collaboration with marketers. A notable example is the development of the Open Planning Methodology in conjunction with the CIM and 20 UK firms (www.openplanning.org). Others include the Stellar[®] and CODAR[®] tools, both developed in partnerships with consulting firms*.

In a frantic market place, integrated marketing effort is an increasingly important factor in ensuring efficiency and clarity of message. The research being done by Angus Jenkinson and the Centre for Integrated Marketing is advancing our understanding of this developing field.

–David Gagie, Managing Director, Consumer Lending & Current Accounts, Lloyds TSB Bank plc

Beginning in 2003, the Centre developed a toolkit for Integrated Marketing. The full toolkit consists of over 150 diagnostics. These are drawn from a comprehensive examination of Integrated Marketing practice, including:

- Brand Management, Positioning and Experience Marketing
- IMC, Media Neutral Planning, Open Planning
- CRM and Customer Management
- Knowledge Management and Learning Company strategies
- Lean and Value Engineering
- Salutogenesis and Health Economics
- Internal Marketing and Culture Management
- Leadership practice
- Balanced scorecard and systems thinking

From this, a refined set of diagnostics consisting of 26 key issues was identified and this was then deployed in the UK’s largest ever survey of Integrated Marketing practice, involving some 200 brands.

The survey had two goals:

Integrated Marketing is about an entire organisation presenting itself through whatever channel to whatever customer in a way that is entirely relevant to that customer.

–Nick Smith, Strategy and Marketing Director British Gas

There has been a great deal of talk about integration in recent years without a great deal of substance behind it. The work that The Centre for Integrated Marketing is doing is really helping to identify, more scientifically, the key factors that drive successful integration at the same time as providing tangible evidence of the benefits of taking a genuinely integrated approach.

–Jon Ingall, Managing Director ais

1. To validate the marketing tool and develop key factor understanding
2. To understand current practice to provide a benchmark for marketers to use in developing their brands and firms.

Integrated Marketing delivers a 10 – 25% enhancement in business performance in the typical brand.

Both of these have been successfully achieved.

Participants in the survey were senior marketers and the only incentive was a copy of the results. Each interview was by telephone (or face to face) and typically took 20 – 30 minutes.

Profit Benefits of Integrated Marketing

Research by the Centre had already determined that the typical scale of benefit for marketers adopting Integrated Marketing was a 10 – 25% enhancement in business performance.

This gain is achieved from a number of inter-related factors:

- Improvements in customer attitudes and behaviours arising from improved and more consistent experiences of brand value.
- Synergy and multiplier effects on profitability from improvements in customer attitudes and behaviours
- More efficient (and effective) media choices and mixes as well as better deployment of communication disciplines
- More flowing, efficient (and effective) business processes, creating higher added value.
- Substantially enhanced evaluation and improved applied learning across the brand organisation
- Improvements in staff morale, work rate, cohesion, stress and creativity
- Reduced employee replacement costs, employee cost/benefit synergies and an enhanced employee cost/customer value ratio.
- Reduction in internal fragmentation and cost holes
- More cost effective use of agencies and business partners with better team results
- Cost effective synergies

Truly Integrated Marketing is the Holy Grail for the marketer. The Centre for Integrated Marketing provides a path to achieve it with a facility unrivalled in the UK, great resources and benchmark learning from a broad range of case studies, project learning and highly professional insight and support.
—Colin Green,
Marketing Director,
Land Rover UK

The study was designed to identify the key levers that drive this business improvement using quantitative research. It aimed to allow a marketing leader to do a diagnostic study of his/her brand organisation to identify comparative strengths and weaknesses and in particular the key action areas for improvement.

Marketers are often accused of not being sufficiently accountable and not having a strategic and instrumental view of brand business development. This is often seen as the reason marketers are often marginalized as ‘communicators’ rarely breaking through to the board room.

Integrated Marketing and its tools promises to radically reverse this marginalization. It provides a strategic agenda for profit improvement that is marketing-led. The success of the top 10 brands in the survey, listed on the final page, is perhaps further evidence.

SEEBOARD Energy exemplifies Integrated Marketing

Our 2002 Integrated Marketer of the Year demonstrates the profit and customer value of Integrated Marketing. SEEBOARD Energy were losing 10,000 customers a week after Energy market deregulation until they implemented a company-wide marketing programme.

Research showed an unexploited asset, their corporate culture of passion and innovation. Under the end line, where does it all come from?, they launched a sustained and committed programme to engage employees and win customers. As a result they were the most improved company in the industry, winning 8 out of 9 customer satisfaction standards in both electricity and gas and customer retention, and increased sales improved share equity by £51 million. They even saved £800,000 a year in employee recruitment costs as morale increased and defections reduced. See case study at www.IntegratedMarketing.org.uk

- Participants included:
- 3i plc
- Aga Raeburn
- Apple Computers
- Aquascutum
- Automobile Association
- Barnardos; NSPCC
- BBC
- Blue Arrow
- BMB
- British Gas
- British Telecom
- Casio Electronics
- Debenhams
- Dixons Stores
- Du Pont
- Ernst & Young LLP
- Federal Express
- Harley Davidson
- Harper Collins Publishers
- Honda; Nissan
- IBM
- Kimberley Clark
- Kit Kat, Cadbury
- Lloyds TSB
- Mont Blanc
- Mulberry
- Novartis Consumer Health
- npower
- OgilvyOne Worldwide
- Olympus
- ORAL B, Corretto
- Osram
- Pfizer
- Pizza Hut
- Rainey Kelly Campbell
- Roalfe
- Renault UK Ltd
- Royal & Sun Alliance
- Insurance
- Royal Mail
- Royal Shakespeare Co.
- Save the Children
- Scotland Against Drugs
- Scottish Equitable
- Scottish Widows
- Sharp Electronics
- Standard Life Assurance
- Sugarshaker
- The RBS Group

The Study Mechanics

The research consisted of 201 valid interviews of senior marketers from a Who’s Who of brands and agencies including IBM, Apple, British Gas, Pfizer, Kit Kat, Harley Davidson, Lloyds TSB and Dixons, see side panel for examples. Almost all interviews were by telephone, a few face to face, using an experienced market researcher.

Brand Breakdown by Category

FMCG	15.0%
High Value Consumer	19.9%
Consumer Services	28.2%
Financial Services	9.2%
B2B	23.8%
Other/undefined	3.9%
	100%

Survey Breakdown by Type

Significant brand	73.2%
Charity	10.1%
Agency	11.1%
SME	5.6%

Research was carried out in two phases during 2004. The first phase of some 50 interviews was designed to validate the tool and research method and its success was reported in the Centre’s Conference in the spring of 2004. The authorial team carried out the modelling. Full interim results were then published to an invited audience at the end of November 2004.

Organisation of Findings

The findings in this report fall into two groups:

- Principles and Performance
- Discussion/Implications

The first section outlines the general learning about Integrated Marketing and the Integrated Marketing Model, as well as outlining the performance of UK brands as a benchmark. The Implications section outlines the key implications for marketers, CEO's and their brands.

In addition, a personalised appendix is provided for participants in the research.

Principles of Integrated Marketing Success

Integrated Marketing involves the whole organisation in a synergistic marketing process. This can be likened to the difference in potency of scattered versus focused light, such as laser.

The essence of the focussing principle is the core identity of the brand, which expresses itself in different forms, including:

- Vision, cultural values, unique, competence, purpose
- Positioning, brand essence, brand personality
- Production values, business model, integrated scorecard
- Governing idea and customer satisfiers/values

These need to be melded and harmoniously operationalized in a coherent brand/company-wide strategy. The effectiveness of this implementation depends on the quality of technology, processes, human resources and leadership.

The purpose of this endeavour is to create coherent, cost effective and value-rich experiences for customers that build profits and customer equity.

Thus there are two sets of key diagnostic areas which drive profits and are therefore of importance to leaders.

- The quality of the customer experience, which shapes attitudes and drives their profitable behaviours.
- Performance characteristics of the businesses that create these experiences

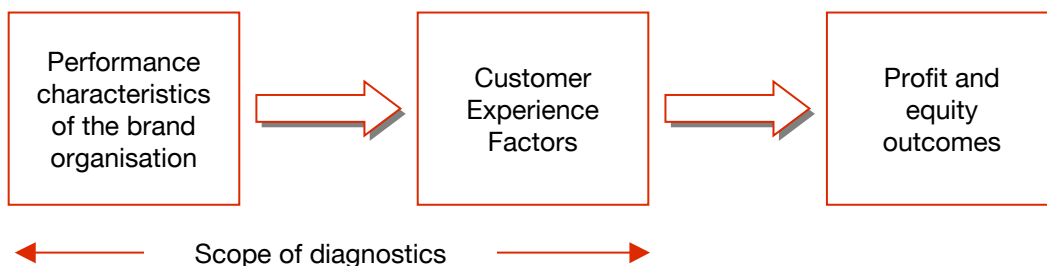


Figure 1. Integrated Marketing Performance Model

Integrated Marketing versus Quality Management

There are many studies of management performance and numerous systems of quality, including EFQM, Malcolm Baldrige and the ISO 9000 series. The Integrated Marketing methodology draws on the best from these bodies of knowledge but blends them in a new and important formulation based on the brand.

In the 1970's and 1980's, product quality was enough to create significant differentiation in many categories. Thus Japanese cars ate the market share of western brands because their cars worked better at a lower price.

But 'quality' is not enough in an age where everything works. In such a world this can mean creating 'high tech commodities' – me-too products on wafer thin margins, such as the 1 – 2% operating margin across the world's small car market. Efforts to beat this by cost reduction simply increases the cycle of stress as everyone reduces fat and no-one increases profit.

Brands are a valuable attempt to overcome this challenge, but all too often this can translate merely into differentiation in communications. Brands ask agencies to create differentiating value when they have not managed to create intrinsic value in the products and services. Marketers know that ads and other marcoms work best when there is already an intrinsic difference and value creation.

Real excellence and success arises when uniqueness is designed deeply, creatively and harmoniously into the practices, products and service of the brand. This requires a special kind of precision leadership to fulfil the genius of the firm or organisation and is the key task for marketing in the 21st Century.

'Quality' is not enough in an age where everything works

An example of Integrated Marketing and Lean

Lean is a technique and way of thinking that improves the flow of value to customers. A typical application involves mapping the value stream and stripping out activities that don't create value for customers. Integrated Marketing would upgrade this in two ways, it would ensure that the exercise begins with a good understanding of the unique nature of the brand's value. And it would ensure that each examination tested for the possibility of creating or adding to this distinct value. In this way it ensures that the firm's value processes are aligned to the brand.

Customer Experience Measure

The study identified four leadership factors that are highly correlated with success in driving the excellence of customer experience. It also identified a robust measure of customer experience that is related to business success, with the five reliably interrelated ingredients shown below:

1. Brand recognises individual customers wherever they interact, when appropriate
2. Customers treated in ways appropriate to them
3. All brand experiences come from one identity
4. Customers trust the brand's promises
5. Customers are happy with the brand experience.

Customer Experience Factors
The 5 diagnostics were found to be a reliable measure of customer experience (Cronbach alpha .676)

3 of these measures describe behavioural characteristics of the brand as experienced by customers:

- It recognises customers, when this is appropriate, creating social value
- It then treats them in ways that are appropriate (individually and/or as a type), thus creating service value
- And there is coherence across experiences. They all come from 'one identity', reinforcing the value and trust.

Although the question is deliberately phrased very simply, it should be noted that we understand 'treating customers appropriately' can vary from service concepts (like answering the phone quickly) to product concepts (like designing a tailored solution) to communication concepts (like sending relevant communication).

In addition the Customer Experience measure includes two that specifically describe the customer's attitudes and client experience: they trust and are happy. These two measures are widely recognised as probably the key drivers of loyalty.

There is clearly a significant body of proven knowledge and expertise about the importance of these factors. The Customer Excellence factor can therefore be used reliably as a predictor of business performance and incorporated into brand tracking and customer satisfaction research.

The level of business impact will vary from (industry) category to category and more work is required to develop general indices. However both Reichheld and Hofmeyr and Rice have developed related models that show impact on business performance.

Trusting and happy: these two measures are the key drivers of loyalty

Integrated Marketing leaders focus on customer experience

SEEABOARD Energy appointed Customer Experience representatives. These marketing executives took responsibility for collecting and collating customer experience across the front line, drawing knowledge from dozens of contact points. An active programme involving hundreds of staff then led to changes that both improved and created a more consistent brand experience.

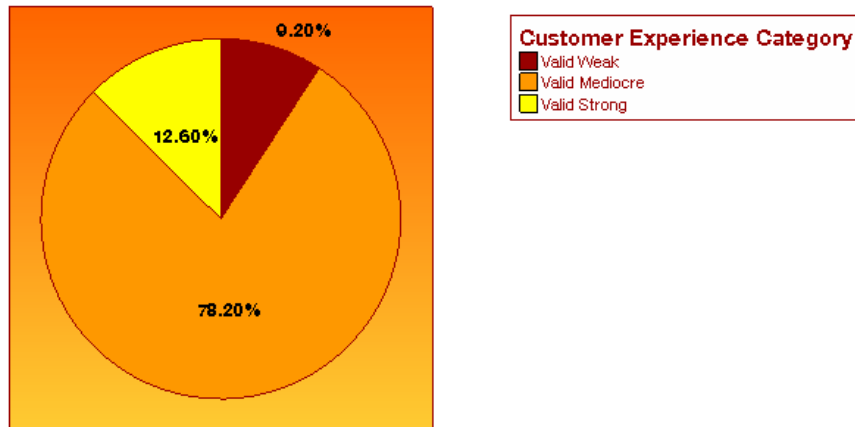
British Gas, the 2004 Integrated Marketer of the Year, had a similar idea. They segmented their customers by value and type and then set out to re-engineer value at every important Touchpoint, making this a basis leadership competence of the company. See case studies at www.IntegratedMarketing.org.uk

UK Performance on Customer Excellence

The research shows that only 13% of UK companies, or one in eight, achieve an overall "strong" rating on Customer Excellence. We identify a 'strong' rating as an average of 6 or greater (out of 7) across the 5 factors.

Customer Experience Category

Statistics : Valid Percent

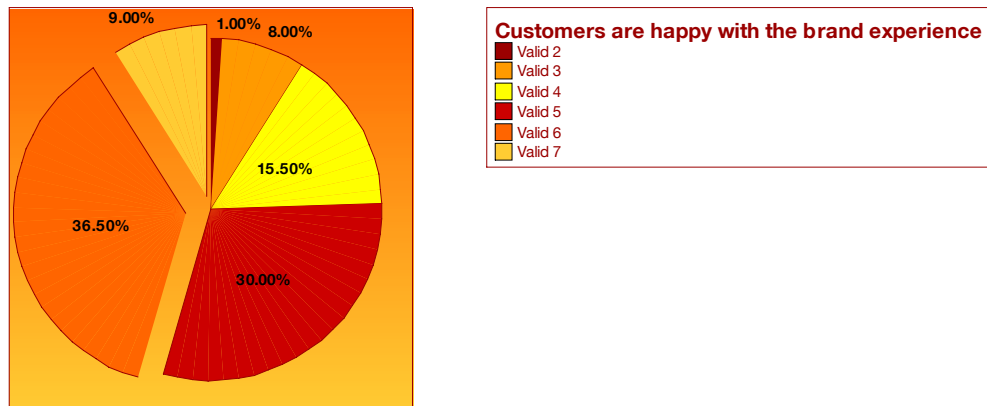


Only one in eight companies are really strong at achieving customer excellence ('strong' means an average score of 6 or more).

This might seem an aggressive target but one in eight companies achieve it, so it is possible. Furthermore, there is considerable evidence, for example in the work of Kano, that higher customer experience factors (delight) have an exponential benefit for the brand.

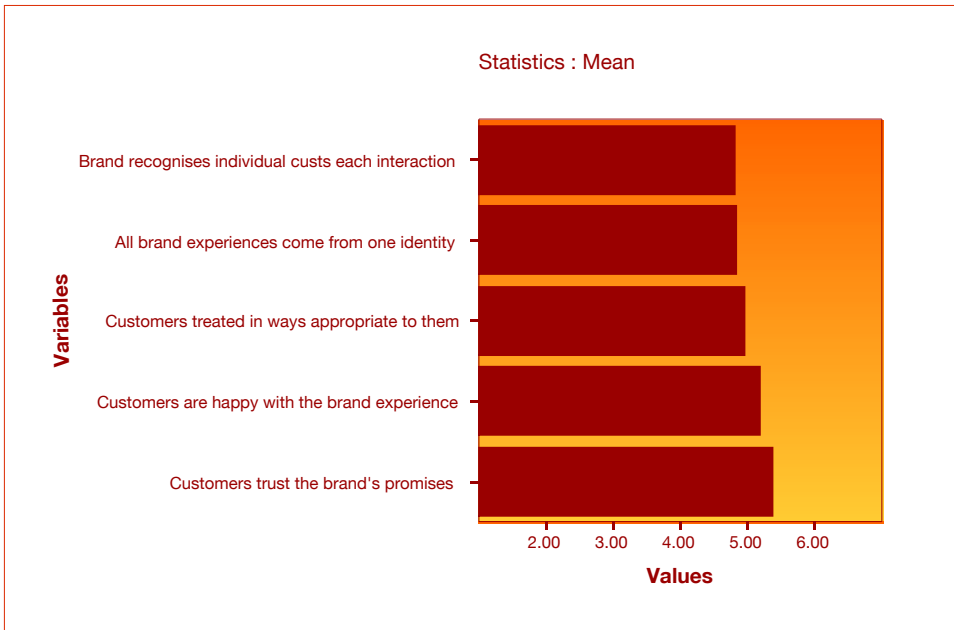
Customers are happy with the brand experience

Statistics : Valid Percent



45% claim to be effective at making customers happy (Score of 6 or 7)

We rate scores of 4-6 as “mediocre”, which was the standard achieved by almost 4 in 5 companies (78%). The conclusion is that most companies could significantly improve – and should. This raises the issue: what do they need to do to improve?



Average customer experience shows room for improvement

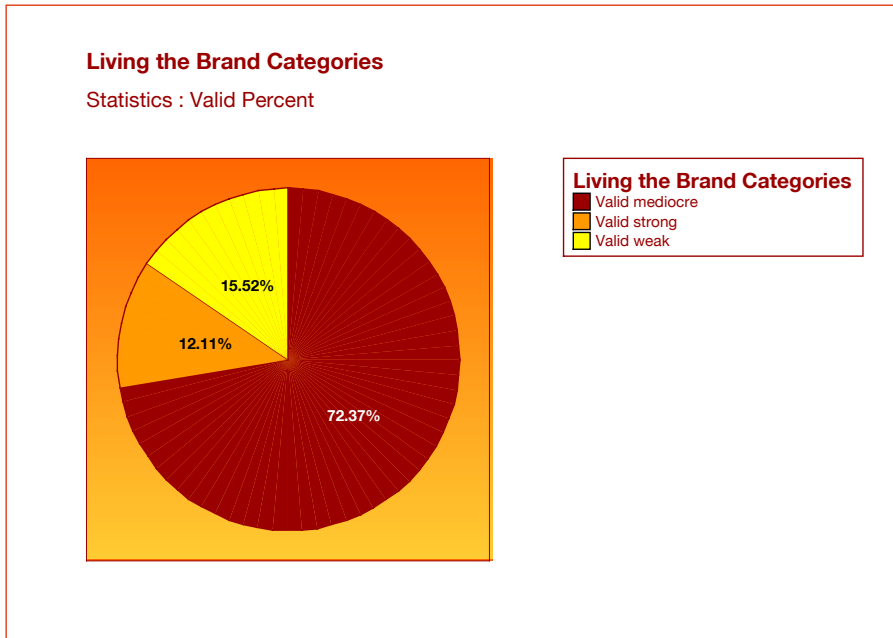
What drives Customer Experience?

The 26 diagnostics group into 4 factors, each of which is correlated (at the 99% level) with Customer Excellence:



The research showed that the diagnostics cluster into four business areas, each of which is correlated with customer experience.

Living the Brand (0.68 correlation) includes those diagnostics concerned with employee participation and culture-brand congruence. These include vision, cultural values, shared service ideal, coherent objectives, partnership with the value stream and processes aligned to the brand. Living the Brand also involves congruence of objectives. Just 12% of UK companies are strong at Living the Brand.



Just 12% of UK brands are strong at “Living the Brand”, while over 70% are weak. ‘Strong’ is defined as 6 or greater, ‘Mediocre’ as 4-5.9 and ‘Weak’ as less than 4 out of 7.

Living the brand factors

- Service-oriented ideal encourages aligned commitment.- Everyone nurtures brand.

- Future vision is consistent with core truths.

- Values in company culture support brand values.

- Excellent at realising high value propositions.

- Quality is what is good for the customer, employee(s) and company.

- Objectives are coherent with our competence.

- There are no silos.

- Culture encourages people to release creative potential.

- Effective partnership with value stream.

- Business processes aligned to brand.

- Leaders promote what they practise.

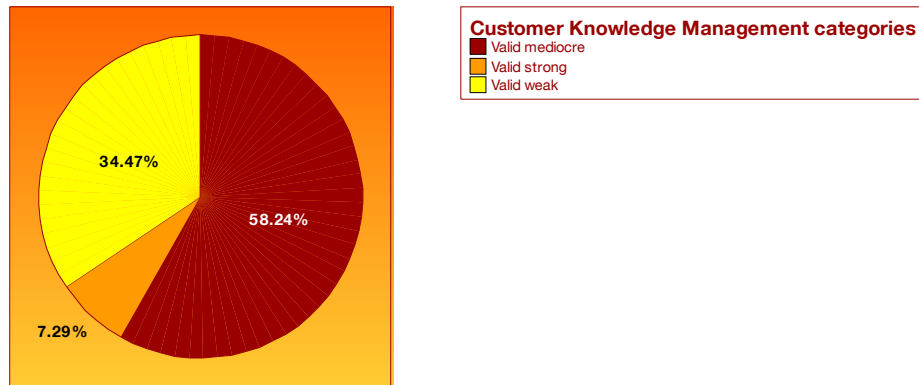
Harley Davidson lives the Brand

Harley Davidson’s marketing, especially its HOG relationship marketing programme, is much admired, and rightly so. But Harley integrated marketing goes deep into the structure and processes of the organisation. Harley is organised into a “circle organisation” which ensures that silos are reduced and customer value focus increased. The individual objectives and performance of every individual are tied into the brand’s goals in a precise and clear way. This aligns the company from both a management and individual perspective. The result is committed and informed employees. See case study at www.IntegratedMarketing.org.uk.

Customer Knowledge Management (0.5 correlation) involves effective processes and systems for customer knowledge capture and distribution. Thus there is shared learning, an absence of silos and customer information available at point of need. Only 7% are strong at Customer Knowledge Management.

Customer Knowledge Management categories

Statistics : Valid Percent



Only 7% are strong at CRM/ Customer Knowledge factors and nearly 60% are weak

British Gas knows its customers

British Gas has been investing in the world's largest CRM project but the technology is only an aid to marketing. The transactional data has been used alongside research input to segment customers by value and type. The knowledge is being pooled from across the company and is in turn used to drive programmes and actions at every contact point. For example, its huge mailing programme is heavily segmented. And in the call centre, automated routines generate action recommendations for staff when customers are on the phones. For further information see the case study at www.IntegratedMarketing.org.uk

- Quality customer information timely at point of need.
- There are no silos.
- Practices ensure shared learning across the organisation.

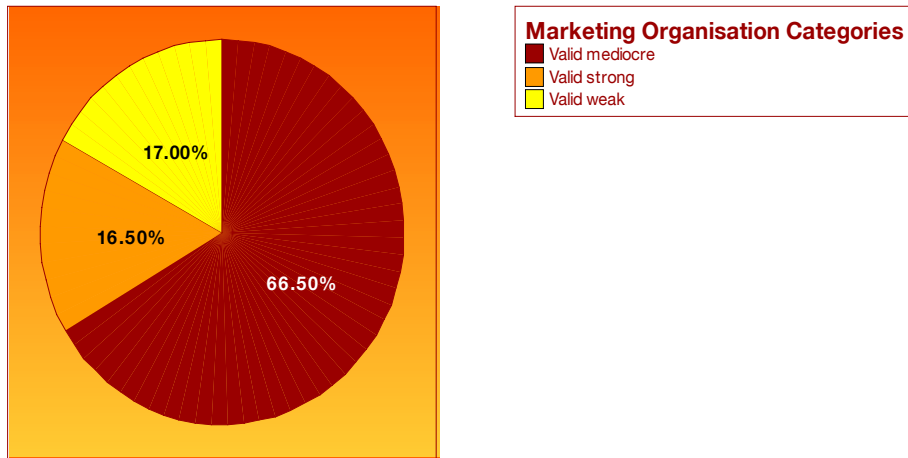
Marketing Organisation (0.49 correlation) Concerns the skills and processes within the marketing function. It is important that communication is aligned by a media-neutral idea, marketers are organised around customers not disciplines, partnership with agencies, and evaluation is managed as a learning discipline. One in six firms are strong at Marketing Organisation.

IBM, NSPCC and others are organising their marketing

Smart marketers are working at ways to be more customer-centred and less media-biased. Traditional marketing communication functions are often segmented by channel: into advertising, PR, direct, sales promotion, interactive, etc. this can lead to fragmentation and pseudo-integration, when communications plans end up in one PowerPoint presentation but the integration strategy doesn't go much deeper. IBM reorganised its IMC function around customer types and the NSPCC is working closely with its agencies to get real collaboration. In Masterfoods, ad agencies have written copy for the sales promotion team and vice versa. For further information see the case studies at ww.IntegratedMarketing.org.uk

Marketing Organisation Categories

Statistics : Valid Percent

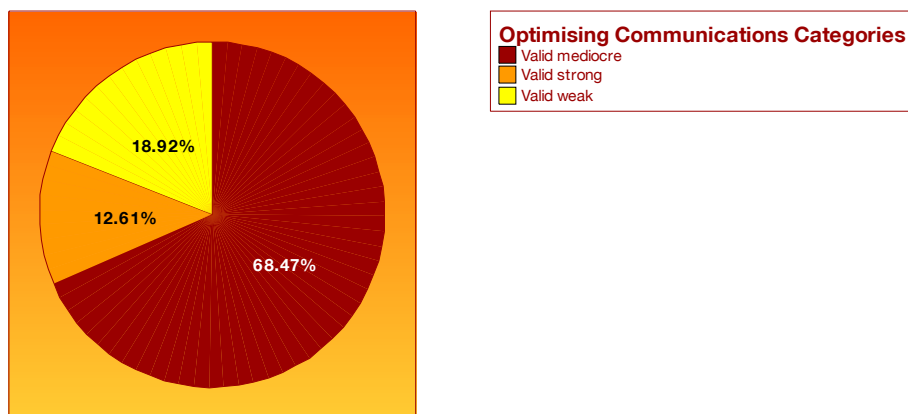


One in six are strong at marketing organisation, and two-thirds weak

Finally, **Optimising Communication (0.51 correlation)** depends on understanding customer groups, managing customers on a lifetime value basis and deploying a universal planning and evaluation framework. Like Living the Brand, it also depends on the quality of leadership. Only one in eight brands are strong at Optimising Communication.

Optimising Communications Categories

Statistics : Valid Percent



Only 13% are strong and a massive two-thirds are weak at Optimising Communications

An Integrated Model

Thus the study reveals a relatively straightforward and powerful model for performance planning! Customers' experience drives business performance and 4 sets of management competence drive Customer Excellence. Companies that are good at these get better customer experience and business performance scores.

However the empirical data supports one further important conclusion. Just six diagnostic factors determine over 50% of Customer Experience.

The BECAUSE Factor

The 6 empirical factors that drive 50% of Customer Experience are outlined below:

- B** Business processes need to be aligned with the brand. It is important that the brand is not just an enthusiastic concept, but something that shapes activities. For example lean and other quality processes need to understand how each process step contributes *uniquely* to the brand value promise, not just generically. Less than 20% are very good at this.
- E** Effective partnership with the value stream is vital in today's' difficult market place. All companies need to partner, whether with distribution channels (Coca Cola), business partners (IBM) manufacturers (Nike) or brand collaborators (World Rally Championship). About 30% of UK companies are good at this.
- CA** Company and agencies need to work in effective partnership. Our research showed too many examples of conflict, power, territoriality and silos in client/agency team relationships. Dominance by the ad agency, poor briefs, lack of team working, failure to share evaluation and results, and fractured structures all contribute to this. Great partnership, such as Land Rover with its agencies, WRC with 23red or SEEBOARD Energy with AIS have a huge impact. IBM formed global partnerships with a few selected agencies, including Ogilvy, a decision that was key to its brand resurgence. This is one of the strongest UK areas – but with only 50% doing this really well (according to the brands) there is still scope for improvement.
- U** Adoption of a universal communication planning and evaluation framework is vital for integrated marketing and media neutral planning. An example is CODAR, developed by Prof. Jenkinson in response to a marketing-specified need, which enables any and all communications to be planned and evaluated using the same simple framework. Again observation of current practice showed many examples of unclear and weak briefs, inconsistent objectives and an inability to demonstrate the relationship between communication activity and customer equity or business profits. Those brand organisations like IBM, Masterfoods and NSPCC who are adopting universal tools are finding significant benefit. One in six companies do this well.
- S** It is important that there is a Service-oriented ideal that encourages aligned commitments. (Examples include AA's Just Ask, British Gas 'Doing the right thing', IBM's e-business and Tesco's Every Little Helps) This is more than a strap line: it is a strategic idea that binds employees into a team. Around 40% of companies have achieved excellence at this.
- E** Excellence at realising high value propositions is vital. Brands like Harley Davison and Apple are successful in a tough world because they design highly differentiated high value solutions. High value propositions do not apply only to high cost propositions. Tesco is excellent at creating value across the price range. Less than a quarter of UK companies are excellent at this.

The six BECAUSE factors

Business processes aligned to brand

Effective partnership with value stream

Company and Agencies work in partnership.

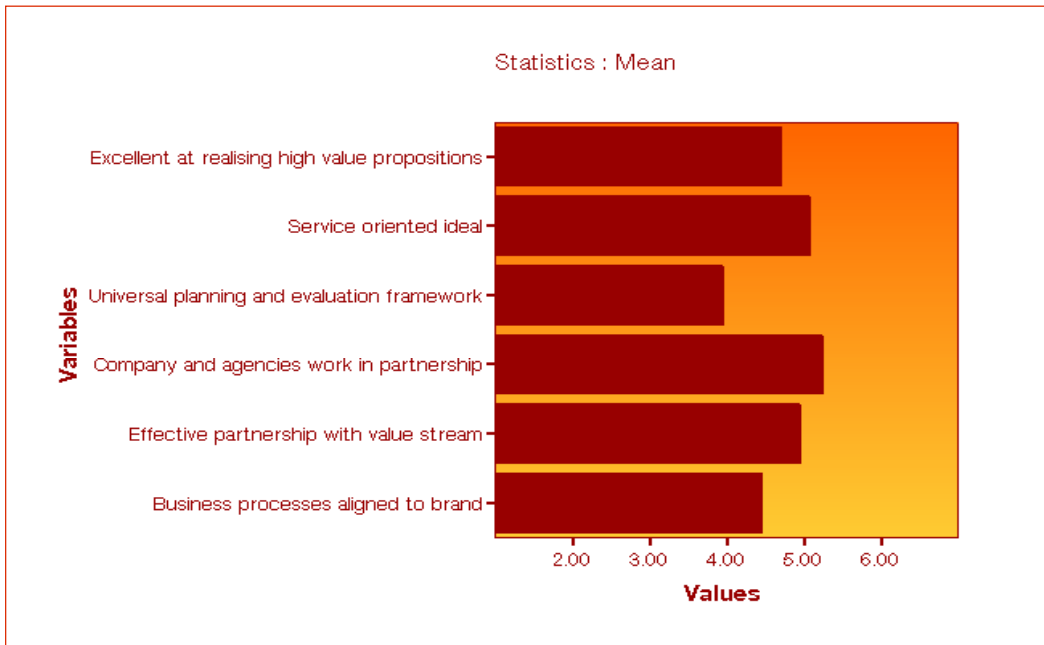
Universal planning and evaluation framework

Service-oriented ideal encourages aligned commitment.

Excellent at realising high value propositions

BECAUSE therefore provides an extremely useful, theoretically sound, and empirically confirmed business planning tool. (BECAUSE is an acronym based on these 6 diagnostics, see footnote).

While ultimate success depends on a full-scale implementation of integrated marketing, these 6 diagnostics indicate the key priorities for leadership attention. That such attention is required is demonstrated by the fact that the average (mean) performance of UK brands is a very modest 4.7 (scale 1-7), with less than 6% “strong”.



BECAUSE
Six factors are most important in driving Customer Experience Excellence. UK firms need to improve their performance on these.

NSPCC goes FULL STOP for Integrated Marketing

The NSPCC, Integrated Marketer of the Year, 2004, demonstrates many good practices outlined by the study. Their FULL STOP programme is more than a communication idea, more even than a strategy – it’s a complete organising idea for the organisation and its partners. NSPCC is focused on ending cruelty to children by 2020, a powerful service-oriented ideal that galvanises the whole organisation and its processes, including donors and volunteers.

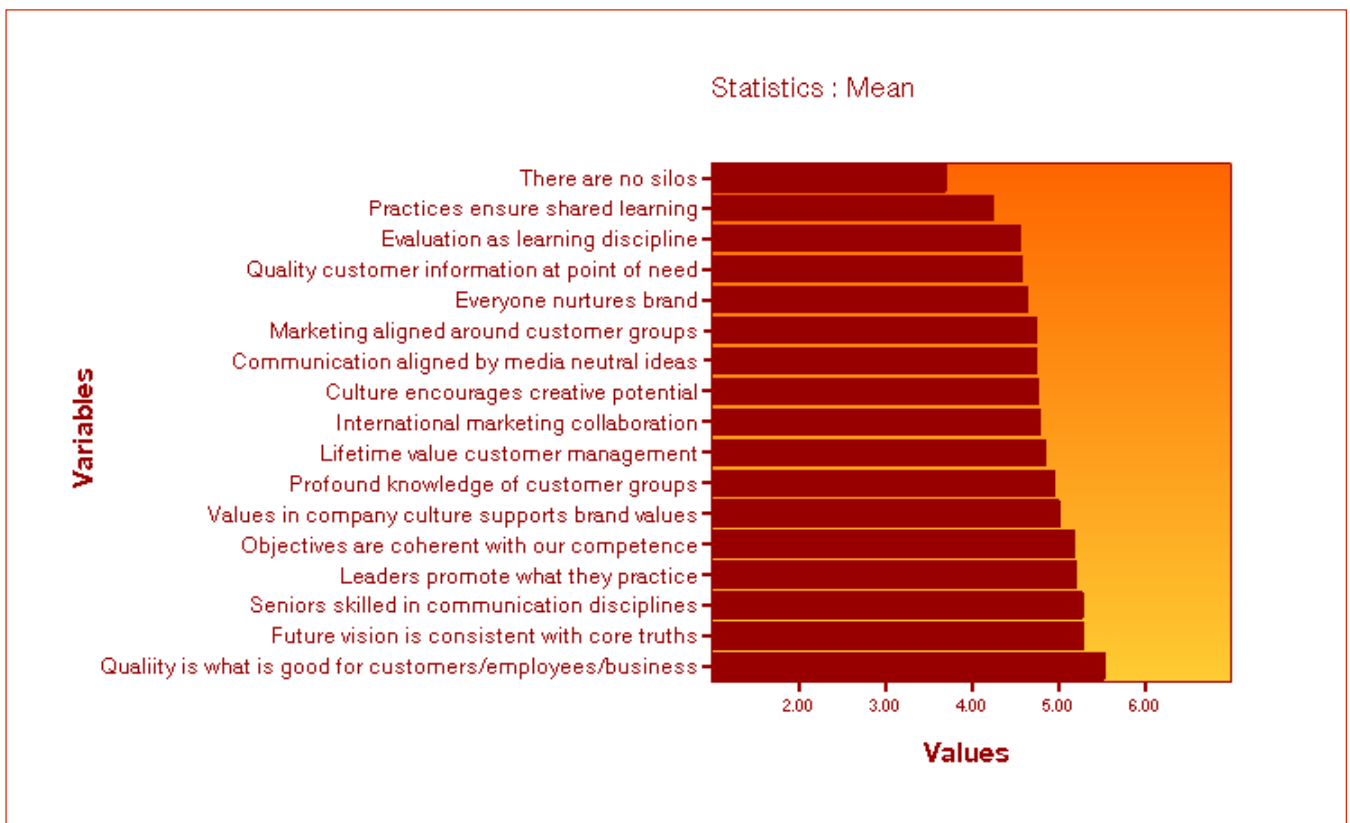
The NSPCC has also now adopted CODAR® as a tool to help it with its ‘universal communication planning’. It organises around two “Milestone” programmes each year each organised by its team of agencies alongside internal communication functions. A big idea shapes each Milestone into a coherent event to support the transformation strategy. All the organisation processes are focused on achieving this.

NSPCC demonstrates that Integrated Marketing works across sectors.

Conclusions and Recommendations

The study provides a practical basis for action by marketers. Although it only uses a UK benchmark, this is still a good starting point for international brands – marketing principles cross national boundaries.

The study shows significant opportunity for UK plc to improve its efficiency and effectiveness, customer experience and profitability. This is something that industry bodies such as CIM, CBI and IPA could address as well as deserving government attention. There is scope for development of the benchmarking tool and for extensions, for example for SMB organisations.



Most marketers will also want to address this for their own corporate and brand improvement:

- Agencies and consultancies should commission studies of their clients to assess opportunities.
- Marketers and/or CEOs should benchmark across their company, collecting data from different functional executives to build up a strategy and action plan for improving brand integration.
- Ongoing scores should be built into corporate performance measures as progress trackers.

The detail shows major opportunity for improvement by UK plc.

Amongst other performance drivers, brands claim to be weakest at removing silos and strongest at achieving a balanced focus on 3D-worth.

Those companies who took part can obtain an individual record of their performance against the top quartile and median scores, which already indicates opportunity for action.

Integrated communication planning needs tools

Many marketers want to develop “media neutral”, integrated communication plans but are stymied by lack of tools and residual behavioural barriers. Our research into Open Planning (www.OpenPlanning.org) shows that the solution needs radical new thinking with tools based on the new ideas. Out go the concepts that fragment the disciplines and in comes new thinking: You can achieve any objective using any discipline in any medium. Top of the list for implementation is a universal planning tool, one that works for any and every communication medium on an entirely consistent basis. An example is CODAR®, a Stepping Stones tool evaluated by the Centre. It creates a common language for planning and a common currency for evaluation. Masterfoods is a user of CODAR®.

Taken in association with the wider body of Integrated Marketing methodology developed by the Centre, this forms a basis for a new marketing-led impetus that moves us from downsizing and standardised quality to a differentiated effectiveness and efficiency in brand management. In this way more companies can match the top 10 UK brands.

Notes

Further information can be found at the Centre for Integrated Marketing’s websites at www.IntegratedMarketing.org.uk and www.OpenPlanning.org.

Other sources include

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UK Top 10

Scotland Against Drugs
News International
Osram
Fred Perry
Holland & Barrett
Federal Express
Royal Opera House
Harper Collins
KB49
Apple

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