



PULSE

FOR AGENCIES 2026

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WELCOME

Foreword

By Victoria Fox

It's been six years since I joined AAR and as I reflect on what's happened during this time, I'm amazed, impressed and - truth be told - a little unnerved by the seismic shifts that we in the agency and marketing communities have undergone.

Let's start with the difficult stuff. I'm writing this the day after it was announced by Omnicom that 4000 more people were to be let go three weeks before Christmas. None of us got into the business to have to make such decisions or suffer their consequences but it's been a harsh reality of what's been happening across the agency landscape, not just within Omnicom and IPG.

We are a small community and no doubt most of us will know someone who has been affected. Should they want a chat, all of us at AAR would be happy to talk, so please just let them know.

As ever in Pulse we look to reflect what we are seeing and hearing across the marketing and agency communities, some of which is the continuation of themes that have already evolved, and some that are more recently formed.

One developing theme is the continued importance placed on **the how** of marketing – the operational plumbing that's required

across a business's people, partners, platforms and processes, that when done well, form the solid foundations and environment in which marketers and their agencies can deliver excellence in **the what** – great insight, strategy and execution, all in service of the customer.

As you read our observations, you'll come across this recurring message – that without a robust operating model marketers are not giving themselves the best chance of delivering great work. This is as applicable to agencies as it is to marketing departments.

In recognition of this, we have launched the AAR Agency Advice Cohort in partnership with [changeforce](#). More on that later in this edition.

Aligned to this we have noticed an increasing need from CMOs to be able to cut through the noise and to focus on what matters most so they can make informed decisions with confidence. Key to this requirement for clarity is the agency consiglieri to whom they turn first. It doesn't matter what type of agency or what job title you have, if you're the person who's on speed dial in your clients' favourites on their mobile, you are as valuable to their business as any personalised, optimised agentic driven campaign.

We can't over emphasise how important these navigators are to clients, and agencies that invest to equip your people with the skills that are required to be a modern-day agency

business lead are seeing the reward in more meaningful discussions about not just their clients' marketing but their business.

2025 marked our 50th anniversary and, while such a milestone is always more important internally, there was a wonderful bookending to the year when in December I announced the promotion of Rebecca Nunneley and Hannah Astill who become Partners at AAR. Both have proven to be exceptional and their elevation to our leadership team is richly deserved.

And if that wasn't enough to celebrate, in February Tobi Asare, formerly Head of Growth at OMD, joins our leadership team as Partner focused on accelerating our growth. We are thrilled Tobi is joining the AAR family.

As we all buckle up for another year of challenge and opportunity let's not forget that although we may compete with passion, we should never lose sight of the compassion in how we treat colleagues, friends and, yes, sometimes competitors in our industry, and that others from across all areas of the business, agency and brand side, reciprocate.

I hope you find something of interest and useful in our latest edition of Pulse and we wish you so much success in the coming year.



FROM THE FIELD: REFLECTIONS BY AAR CONSULTANTS

Creativity: the ultimate differentiator

By Rebecca Nunneley

If one theme has defined this year, it's change - and the growing expectation that agencies will help clients navigate it.

More than ever, clients aren't just looking for an agency; they're looking for a transformation partner. Every marketer I speak to is in some state of flux - rewiring their marketing operating model, embedding new technologies, or restructuring their teams. Behind almost every pitch now lies a hidden brief: *help me deliver this change successfully.*

Agencies are being chosen not just for their ideas, but for *how* they work - how they transition, collaborate, and bring clarity to complexity.

At the same time, I can't help but notice how AI, for all its promise, is making many agency decks look the same. Hyper-polished visuals can impress, but they often strip away the imagination that once made early creative work so powerful. There's a kind of magic in a rough sketch - that unfinished scamp that invites the client to imagine the idea for themselves. When everything looks fully formed from slide one, we risk losing that spark.

And that, really, is the bigger point. When everyone has access to the same tools, data, and AI, creativity becomes the ultimate differentiator.

In a year defined by transformation, creativity remains the constant - the most valuable, human thing our industry has to offer.

Bridging the “What” and the “How” of marketing

By Cristiana Spataru

Agencies know that great marketing doesn't just come from a standout idea. It comes from the ability to make that idea happen. Behind every strong strategy is an operating model that turns ambition into action. The “what” - a client's priorities, plans and purpose - only delivers when the “how” - people, partners, processes and platforms - is designed to support it.

At AAR, we sit at the intersection of brands and agencies, helping both sides build the marketing models that make great work possible. Through our work assessing agency ecosystems, redesigning operating models and developing marketing capabilities, we see the same challenge again and again: strategy and operations evolving separately, when they need to move together.

Many organisations struggle not because their operations are weak, but because their strategy isn't clear. When the role of marketing in the business is undefined, or when priorities aren't aligned, even the best processes can't deliver progress. Equally, a brilliant strategy will falter without the right systems and partnerships behind it.

This is where agencies have real influence. The strongest ones operate upstream - shaping how marketing works, not just what it says. They help clients connect the “what” and the “how”, spotting where capability gaps, partner overlaps or platform issues might block performance. By asking the right questions early, agencies can turn delivery frustrations into strategic value not by taking on more, but by helping clients see the connections that unlock progress.

At AAR, our focus is on the “how”: the marketing operating model that gives strategy its power. We see that it works best when it's built collaboratively, with agencies and clients sitting on the same side of the table. Operating upstream isn't easy. It means shifting conversations from outputs to outcomes, from timelines to transformation. But when the “how” is as strong as the “what”, marketing stops being a function and starts becoming a force - one that drives creativity, effectiveness and growth in equal measure.



The future of media agencies: rediscovering specialism in a commoditised market

By Hannah Astill

The media landscape has never been more complex. Fragmented audiences, shifting consumer behaviours, and the accelerating influence of digital and AI are reshaping how brands reach and engage people. Amid all this change, one question keeps surfacing: what does the future look like for media agencies - and will they still look like they do today?

The traditional model is evolving fast. As automation and in-housing take on more delivery functions, agencies are being asked to bring greater strategic and analytical depth. Clients want sharper consultancy and smarter insight - but that doesn't fit easily within an hourly-rate or FTE model. New, output-based commercial structures will need to reflect value, not time.

For agencies, this is an opportunity to reclaim their role as specialist advisors rather than transactional partners. No in-house team can replicate the cross-industry knowledge, commercial clout, and platform relationships agencies navigate every day. Our [Evolution of the Marketing Operating Model](#) report reinforces this: across disciplines, agencies need to elevate their role - becoming more strategic and more specialised, while AI supports tier-two delivery.

With consultancies, tech vendors, and in-house teams now competing for the same strategic ground as media agencies, they must double down on their biggest strengths - be it audience, analytics or the ability to translate strategy into execution. Understanding, finding, and connecting with growth audiences is still where brands see huge, unrivalled value in media agency partners.

The challenge - and opportunity - ahead is to repackage that expertise for a new era, ensuring media agencies stay indispensable in a changing world.

What's shifting in the agency-client dynamic

By Vicky Gillan

In my work leading agency relationship resets, I'm seeing a clear shift: brands and agencies are both rethinking *how* they work together, not just *what* they work on. The world has become more complex - channels, teams, expectations, stakeholders - and yet most partnerships are still running on structures and rhythms designed for simpler times.

What's emerging now is a recognition that good relationships aren't self-sustaining. They need intentional maintenance. Regular reflection. Space to talk about the *how* as much as the *what*. The most successful partnerships I see are those that make time to recalibrate before things creak, rather than waiting for a crisis to force it.

And that's where resets come in. Done well, they're not dramatic interventions - they're disciplined conversations. A chance to strip things back to purpose, ambition, and the behaviours that actually drive great work. It's where clarity replaces assumption, and mutual accountability and action replaces quiet frustration.

In my work at AAR, I see first-hand the difference that objectivity makes. When you're too close, it's easy to normalise the noise or avoid the difficult conversations. A fresh, experienced perspective can connect the dots, reveal what's really going on beneath the surface, and re-energise teams around what matters most.



Slow, slow, quick, quick, slow

By Tony Spong

Back in 1986, Carlo Petrini, a journalist from Piedmont, was reading about protests against the first McDonald's opening near Rome's Spanish Steps. Beyond the visual damage to the piazza, he feared food was being reduced to mere fuel - energy for the body, no better than petrol for a car.

He believed mass-produced, processed food would erase originality and individuality from food culture. When we rush, he argued, we lose care, connection, and quality. Food's social value lies not just in preparation, but in the shared experience - something that elevates it beyond simple sustenance.

So, with a group of like-minded people, Petrini founded the **Slow Food movement**, now active in over 150 countries, celebrating diversity, authenticity, and the joy of taking time.

Fast-forward to today: Tamar Kasriel recently noted that social media has become just media. Only 17% of Facebook and 7% of Instagram use involves sharing with friends. Two decades on, the "social" web has evolved into broadcast media. Digital fatigue is real, and AI seems only to add to the mass-produced noise.

No wonder the idea of **Slow Marketing** is gaining traction. Like its culinary cousin, it values authenticity, intention, and respect for the audience's time and attention. It's an antidote to the relentless output, hard-sell tactics, and artificial urgency of "fast" marketing. Brands are asking fundamental questions: How can we be authentic, not fake? How can we listen better, show respect, and build trust that drives sustainable growth?

Agencies have a real opportunity here. Brands don't need more content or quicker campaigns - they need partners who help them **slow down with purpose**.

The challenge is to:

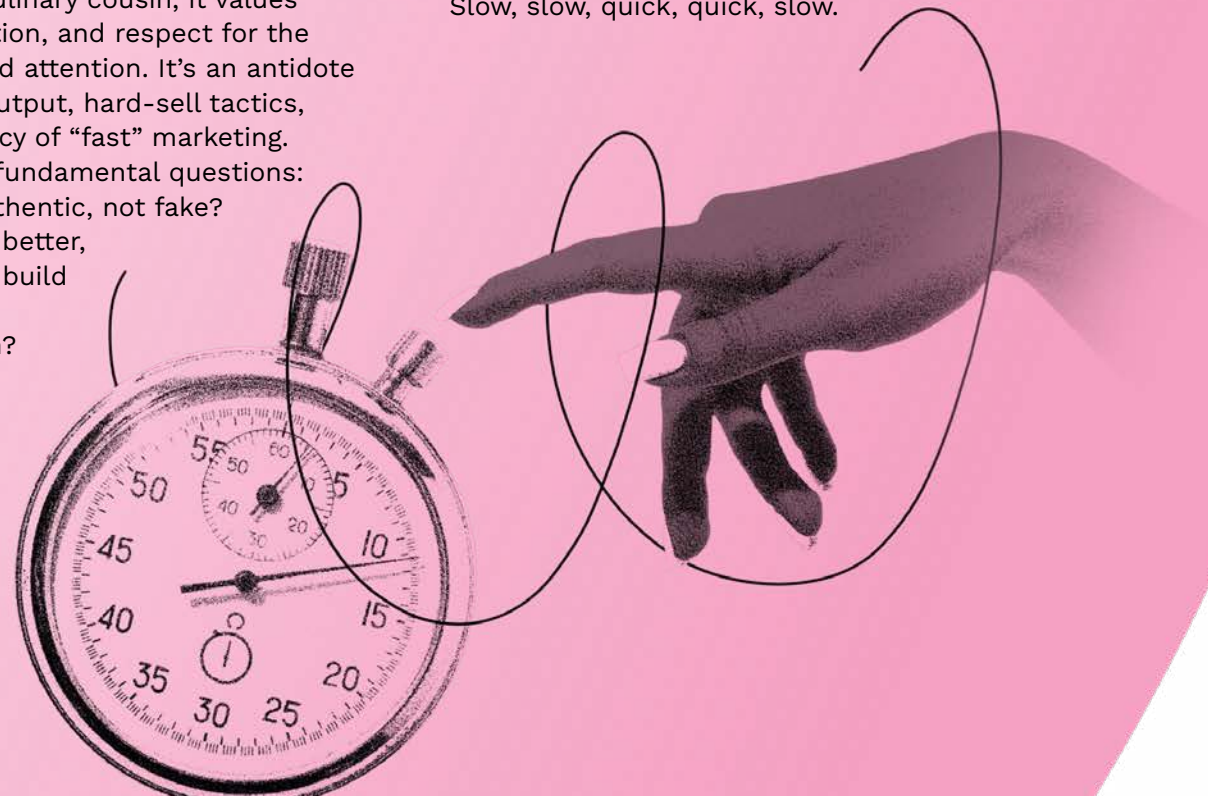
- Reconnect with values and audiences in more human ways.
- Focus on quality storytelling over quantity.
- Use data to deepen understanding, not drive output.
- Build systems that foster long-term trust.

Slow Marketing reframes success away from clicks and trends toward lasting relationships and cultural relevance.

As Carlo Petrini said:

"Being slow means that you control the rhythms of your own life. You decide how fast you have to go in any context. If today I want to go fast, I go fast. If tomorrow I want to go slow, I go slow. What we are fighting for is the right to determine our own tempos."

Slow, slow, quick, quick, slow.



Winning upstream: the agency's role in customer-centred transformation

By Paul Stevenson

Right now, CMOs are under relentless pressure to deliver customer-centred growth. Everyone says they want more relevance, more personalisation, more efficiency. But the reality is that most teams are still fighting uphill against three immovable blockers: fragmented data, skills gaps, and painfully slow content production. You can't deliver modern customer marketing if the fundamentals are broken.

At the same time, the agency landscape has fundamentally shifted. Agencies aren't just competing with each other anymore. They're competing with consultants who are shaping strategy before agencies are even invited into the room. They're competing with tech vendors who are selling the vision of orchestration and personalisation directly. And they're competing with in-house teams who are getting stronger, smarter, and more connected to the business every quarter.

Clients are reorganising around customer segments and value pools, not channels. The vertical silos of the past are fading. The work has become horizontal, integrated, and outcome led. And many brands can't even confidently brief "personalisation" because their building blocks (data, tech, talent) still aren't connected.

So, the opportunity for agencies is absolutely there. But it's upstream.

The agencies that win will stop selling campaign ideas in isolation. They will act as transformation partners. They will help cut through complexity, re-shape customer strategy, unlock usable data, speed up content operations, and connect customer and brand to media and results.

Clients don't need more noise. They need partners who help them change the way they work - and deliver customer outcomes. These are the agencies that will keep winning.



It's not about what you've done, it's about what you're doing and where you're going

By Andrew Bloch

Agencies are facing a hyper-competitive landscape transformed by constantly changing requirements. As clients reset their rosters, agencies must recognise that the traditional pitch story, centred on past achievements, awards, and client logos, doesn't resonate quite like it used to. The pace of technology and shifting client priorities have made historical proof much less relevant.

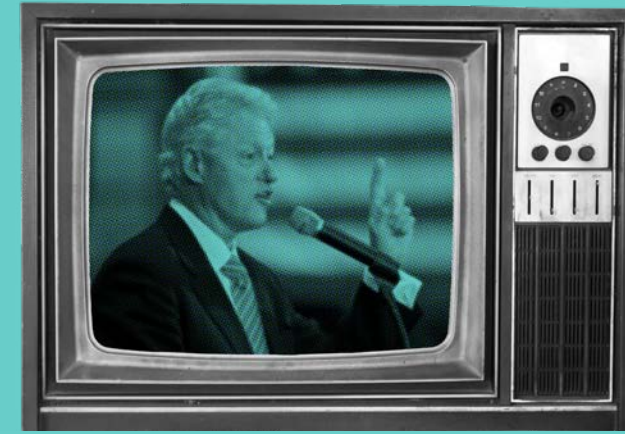
To win pitches, agencies must evolve their narrative from showcasing what they've done to demonstrating what they're doing and where they're going. The winning formula lies in balancing three elements: the past establishes credibility, the present shows relevance and agility, and the future illustrates a clear vision that they are future-proofed and ready for the journey ahead.

Clients now buy momentum and vision more than history and legacy. They want to see how agencies are solving problems today, how they're using AI, automation, and data to navigate uncertainty and build for what's next. Successful agencies are shifting from selling proof to selling progress, showing live examples of innovation, flexible operating models, and the evolution of their offering.

The most compelling pitches bring the present to life, provide clarity about future direction, and make that future feel tangible, not theoretical. Clients aren't just purchasing services; they're investing in trajectories.

Ultimately, an agency's story must connect legacy, relevance, and vision. The past earns recognition and credibility, the present builds trust, and the future inspires belief. In a market defined by speed and transformation, belief isn't just a differentiator, it's what wins pitches and secures lasting partnerships.

One final note of advice for agencies inspired by WPP's recent appointment of McKinsey: Stop being a cheaper version of something AI does brilliantly. Start being the expensive human bit that AI can't replace.



'It's the economy, stupid'*

By Paul Phillips

The defining message of Bill Clinton's successful 1992 Presidential Campaign was that what mattered most to American voters was the state of the economy.

Without wanting to torture or bend out of shape the analogy, I'd suggest that what should matter most to agencies and their clients - and if sorted would help address many other challenges - is the value exchange that takes place between them. (Not whether the pitch is dead; a subject that seems only to serve as click bait for the trade press and some struggling members of the pitch consultancy fraternity.)

The trifecta of advancements in technology, credible in-housing of capabilities once the sole domain of external agencies, and production at scale expertise has marked a seismic shift in the role agencies can play in the lives of their clients' business. And with this changing role comes the question of value contribution and long-term relevancy.

The more (financially) successful agencies are re-engineering the commercial relationship they have with their clients and, in doing so, have re-dressed the apparent race to the bottom for services measured by how cheap they are - a metric that is patently looking through the wrong end of the telescope.

Every CMO with whom I discuss this topic is willing to pay their agencies more, if the agency can demonstrate the business contribution to the satisfaction of their clients' CEO and CFO, and not just an industry awards jury.

Because when it comes down to it, the success of an agency's business is, to a large degree, impacted by the success of their clients' business, or put another way...it's the economy, stupid!

*James Carville, strategist to Bill Clinton

The case for a modern marketing operating model - and the role for agencies

By Robin Charney

Marketing is one of the UK's biggest growth engines - contributing over £100bn to GDP and more than £40bn in annual ad spend¹. Yet many organisations still lack the structure and ways of working needed to unlock its full value.

45%

of business leaders question its professionalism²

39%

believe poor practice wastes budget²

11%

of marketers can prove brand impact³

And it's taking its toll. Over half of marketers⁴ say they feel overwhelmed, undervalued, or emotionally exhausted - just as budgets decline for the first time in four years.

Marketing is expected to perform like a business system - but often runs without one. That's why a modern marketing operating model is so important. It gives teams the structure to be effective and the freedom to stay creative. Built around people, partners, process and platforms, it helps marketing deliver faster, smarter, and with clearer accountability.

For agencies, this shift is a real opportunity. When clients have a strong operating model, collaboration improves, briefs sharpen, and creativity can have a bigger impact. Agencies that help clients build and run these systems move from being suppliers to being true growth partners - driving efficiency, effectiveness and measurable performance.

In a world shaped by AI and tighter budgets, success will come from balancing creativity with commercial clarity.

¹ Advertising Association (AA) / WARC Expenditure Report

² Chartered Institute of Marketing (CIM)

³ Marketing Week's Language of Effectiveness survey 2025

14 ⁴ Marketing Week's Career & Salary survey 2025

The 2025 New Business market

By Paul Phillips

Another year gone, and the chance to take the temperature of the new business landscape and consider what the forthcoming year might offer up by way of growth opportunities.

The recovery in 2024 appears to have been short lived

The figures and sentiment from the market indicate that 2025 was a new business year of two distinct halves. Last July we reported that the recovery in net new business that was experienced in 2024 (total market +15%) appeared to be short-lived as the comparable figure at the half year in 2025 was -28%, with each sector suffering double digit decline in opportunities other than for social media. Nearly full year figures for 2025 (January to November) show a recovery (of sorts) vs the first half of the year, but still an overall decline vs the same period in 2024.

| | 2025 vs 2024 | 2024 vs 2023 |
|---|--------------|--------------|
| Total Market | -18% | +15% |
| Advertising & Integrated (incl. digital creative) | -18% | +3% |
| CRM/CX | -82% | -17% |
| Social | +15% | +81% |
| Media | -9% | +28% |

Data from www.garnewbizmoves.co.uk.
Figures are only for pitches that have announced a result and excludes pitches not yet completed.
Digital reviews are no longer recorded separately and allocated to either advertising/integrated or CRM/CX based on the reported scope of work.

In H2 2025 there was a recovery in the overall new business market when compared to H1 2025 resulting in an overall year-on-year decline of -18% for completed new business pitches. Essentially, the market returned to 2024 levels of activity.

Advertising & Integrated

While reported media spend is no longer an accurate barometer for the scale of an account, in the absence of anything more complete, it's still a reasonable proxy to employ. In 2025 there were more scale opportunities than in 2024 (nine vs five). In addition, there was more CCS activity - good news if you're on the Government roster.

These scale opportunities were made up of four from financial services, two from retail, and one each from telco, gambling and local government. Interestingly and perhaps even encouragingly, there was no one agency that dominated these opportunities, as can be seen from the summary below.

| Brand | Pitching Agencies | Winning Agency |
|------------|-------------------------------------|--------------------|
| Barclays | M&C Saatchi, TBWA, VCCP | VCCP |
| Nationwide | Leo Burnett, Mother, Neverland | Mother |
| NatWest | Dentsu, IPG, Publicis Groupe, WPP | IPG |
| Santander | IPG, Publicis Groupe, WPP | Publicis Groupe |
| Asda | AMV BBDO, Lucky Generals | Lucky Generals |
| Waitrose | None | Wonderhood Studios |
| BT | Saatchi & Saatchi, Ogilvy, Uncommon | Uncommon |
| Ladbrokes | Atomic, St Luke's, VCCP Blue | Atomic |
| TfL | Accenture Song*, VCCP | VCCP |

*Stood down by TfL mid-way through the review

What, if anything can we learn from this?

Two things, perhaps. First, on their day, any agency can beat their competitors, and no single agency dominated the new business landscape, at least in open competition. And second, most agencies do not have the resources to pitch continuously or successfully manage more than one scale opportunity at a time. But it's not all about scale opportunities, and there are good reasons why smaller commercial opportunities are equally rewarding when measured against other criteria – the opportunity to do great work, getting onto a client's roster for the first time or simply to work with great marketers.



CRM/CX

We think the dramatic drop off in reported CRM/CX reviews that the figure might suggest does not tell the whole story for three reasons.

- 1 Increasingly, the creative scope of work included in new business opportunities stretches across multiple elements of the customer journey - for instance upper and lower funnel, brand and performance, acquisition and retention. More often than not, these are reported as integrated opportunities with the CRM/CX element not specifically called out.
- 2 Agencies that deliver multiple capabilities across the communications spectrum are growing their scopes of work organically. Such growth is not picked up and reported by the industry trade press to the same degree as competitive new business won.
- 3 The rise of in-house lower funnel marketing capability has negated the need for external agency partners and, in doing so, reduced the volume of pitches in the market.

It would be wrong to think the importance of CRM/CX to marketers has diminished, rather the sourcing of such expertise has evolved from the traditional path of standalone agencies competing for this element of a brand's comms requirements through an open market pitch.

Media

More than any other sector, the media pitch landscape can be clearly segmented in two. There are the international or global behemoth businesses, all of which are competed for by a combination of the (now) big five, sometimes with what they would consider to be the occasional interloper of a Stagwell or S4C.

Then there's the domestic opportunities in which the independent media agency community continues to ramp up its collective proposition to

the market that they care more, are not restricted by legal but opaque commercial collusion with media owners and tech platforms, and are only in service of their clients' success rather than that of their shareholders.

As I have previously written, if you work in a media agency, you're always going to be busy dealing with new business opportunities on one side of the incumbency fence or the other. It's unlikely that a 9% drop in new business activity delivered a corresponding amount of time back to media agencies to focus on their existing clients or other areas of their own business.

At the time of writing there were 20 reported media pitches that had not yet been concluded or the result not yet known but for those that had been completed, success was spread across network and independent agencies, albeit the universe of media agencies being smaller than that of their creative cousins, brother, sisters and friends.

In a high quality well supplied market, you pays your money and you makes your choice.

Social

With pitch growth of +15%, social is still the poster child of contemporary comms, albeit encompassing paid for, influencer, community management, and sometimes PR.

New business success appears to be more dominated by the independent agencies, at least based on trade press coverage. It may be that networks are picking up more social business organically rather than in open market pitches, in a similar manner to their growth in CRM/CX.

Whatever the source of growth, social in all its forms continues to buck the trend of other marketing services and, while the trajectory is beginning to flatten, there still appears to be a lot of heat in this area of the market.

If you haven't already ramped up in this space, there's still time to do so and enjoy what remains of the growth in new social opportunities for agencies.

There has been a noticeable shift (+16% points) back towards fuller scale open competitive pitching, with eight out of 10 pitches recorded as being open to the whole market and fought for competitively.

There has been a corresponding reduction in appointments made without a pitch (-13% points) with the balancing 3% recorded as pitches involving only roster agencies.

Our interpretation of this upturn is that, in 2025, businesses have returned to placing significance on what a potential agency can do for the pitching business and have not been making as many agency selection decisions based on what the agency has done for its other clients.

The debate about pitching will continue, espoused by those who may have a little too much time to spare!

MOST ACTIVE NEW BUSINESS SECTORS

| | 2025 | 2024 |
|---|---------------------------|---------------------------|
| 1 | Retail | Retail |
| 2 | Food | Food |
| 3 | Financial Services | Travel, Tourism, Holidays |
| 4 | Travel, Tourism, Holidays | Financial Services |
| 5 | Charities | Non-alcoholic drinks |
| 6 | Alcoholic drinks | Charities |

The TOTPP (top of the pitch pops) are dominated by the same sectors occupying different positions in the charts from year to year. This is, in part, a reflection of the sheer number of active brands in these sectors, resulting in there being a greater number of pitches.

Are we to read anything in the replacement of non-alcoholic drinks by alcoholic drinks brands reviewing their agency arrangements?

What of 2026?

Rather than predicting growth or decline that, a bit like the Traitors round table, is based much more on guesswork and instinct than 100% empirical evidence (but it does make their decision-making justification very entertaining), I'm not going to put figures to what we think the 2026 new business market will look like.

But I will sign up to these three predictions with a high degree of certainty:

- 1 Unfortunately, new business ghosting will not become a thing of the past, and if current commentary is a sign of things to come, its prevalence is set to increase (though never in an AAR supported review).
- 2 Competitiveness, in whatever sector of the market, will remain as high as ever. Aside from all the economic imperatives that successful pitching serves, it gets the juices flowing, and the legal high of winning is a drug for which pitch teams are happy to maintain a habit.
- 3 You and your people will feel better if you walk away from an opportunity that doesn't feel right or sit comfortably with you. To borrow the words of Betty Ford 'Just say no'. Unless you're fully committed to a new business opportunity, you're not going to win, and without such commitment, you're wasting your energies and will get beaten. We all know this to be true!

This year, we wish you every success in the new business opportunities you pursue, and the confidence to walk away from those that aren't right for your agency.

GROWTH IN THE % OF COMPETITIVE PITCHES

| | 2025 | 2024 |
|---------------------|------|------|
| Open pitches | 80% | 64% |
| Roster only pitches | 3% | 6% |
| No pitch | 17% | 30% |

Data from www.aarnewbizmoves.co.uk.

The power in the pause

By Vicky Gillan and Paul Phillips

Marketing leaders today face an undeniable paradox. Expectations have never been higher: deliver growth, build brand equity, harness new technologies, and keep up with relentless demand. Yet the instinct to do it all often leads to diluted impact, fragmented execution, and the creeping risk of burnout. AAR practitioners Vicky Gillan and Paul Phillips came together to discuss how to find a solution to a world where ‘yes, next’ is likely to add fuel to the fire, but a straight ‘no’ is not always a feasible option.

The smarter path forward isn’t about doing more, it’s about doing what matters most, and delivering it with clarity. Paul and Vicky reframed the challenge, not as “doing it all” but as asking the smarter question: *what matters most, and how do we deliver it with impact?*

Beyond “Just say no”

For years, marketing advice often circled around the power of saying no. But in today’s environment, where priorities shift by the week and stakeholders expect agility, a flat refusal rarely solves the problem. Instead, the power lies in the smart yes.

Vicky points out, “saying no is just not going to happen.” Instead, the smarter approach is to say “yes, if...”: *yes, if we stage it; yes, if we bring in partners; yes, if AI can streamline the process; yes, if it drives impact, not just activity.* This approach doesn’t avoid responsibility. Rather, it unlocks creativity and collaboration within your 4Ps (people, partners, process, platforms). Leaders who adopt the ‘yes, if’ create a culture of problem-solving rather than rejection, steering teams away from conflict and towards constructive solutions.

According to Paul, the CMO’s role is increasingly about sharpening focus: “What you do has to have a business impact, otherwise you’re being busy fools”. That requires judgement calls, not shortcuts; knowing what to cut, what to pause, and what to hand over within the operating model.

The power in the pause

In a world obsessed with speed, taking a deliberate moment to reassess, recalibrate, or reprioritise can be a superpower. The ability to pause can unlock smarter decisions and prevent teams from spiralling into overwhelm. Vicky explains this means creating trust and space within teams and agencies to pause and ask:

- What is the smartest solution, not just the fastest one?
- Can we launch a minimum viable product before scaling?
- Are we chasing activity for its own sake, or driving real commercial outcomes?

This is not procrastination, it’s precision. The pause allows teams to step out of firefighting mode and into intentional decision-making, creating space for long-term value and established processes rather than short-term noise.

Processes that protect focus

Sustained focus doesn’t happen by accident. It’s built through processes that filter, prioritise, and protect teams from chaos.

Paul and Vicky point to the impact of internal processes on new work requests as an example, sharing a model from a retailer that introduced a simple triage system: instead of new requests dropping directly onto teams, they were filtered in a weekly leadership meeting. They had to be presented to leadership, with justification, to then be shared out. The results were striking – fewer unnecessary requests, faster resourcing decisions, and greater clarity for teams.

Paul adds that classic tools like RACI (or RACIO, with “omit” built in) clarify who owns which part of the process and when. These frameworks aren’t bureaucracy; they are safeguards against “version 57” syndrome, where everyone wants their fingerprints on the work, and they protect teams from endless cycles of rework. In a world of competing voices, boundaries create focus.



Smarter solutions and the role of AI

Human judgement sits at the heart of smart marketing leadership, but technology has become a force multiplier. Vicky stresses that AI is already transforming the way teams operate, collapsing months of planning into days, automating repetitive work, and enabling faster decision-making.

For leaders, the imperative is clear: embrace how AI can support smarter delivery without losing sight of strategy. The new benchmark isn’t just *faster, cheaper, better. It’s faster, cheaper, better... and easier.*

Leadership through clarity and trust

At its core, effective marketing leadership is about creating clarity and building trust. It’s about setting boundaries, encouraging constructive challenge, and ensuring that every action connects back to business impact.

Paul notes that great leaders resist the temptation to be everywhere and do everything.

Instead, they foster environments where their teams can focus on purposeful work. They champion “purpose-serving” over “self-serving,” and in doing so, they enable impact at scale.

Smarter, not busier

Marketing will never be about doing less; new priorities will always surface, plans will always need revising, and deadlines will never move back. The question is how teams and leaders respond.

The answer, it seems, lies in balance:

- 1 Say “yes, if”.
- 2 Harness the power in the pause.
- 3 Focus relentlessly on impact.

In a landscape where dropping a ball isn’t an option, smart prioritisation and thoughtful leadership are the only ways to keep them all in the air.

Marketing transformation isn't a toolset - it's a mindset

By Tony Spong and Vicky Gillan

It's tempting to think of transformation as a fixed moment in time - a launch date, an announcement, a go-live milestone. But the reality is more complex. Most marketing teams aren't going through one change. They're navigating multiple, overlapping stages of transformation simultaneously.

Walk into any marketing team today and the chances are you won't find one transformation underway - you'll find three, four, or even five - and all at various stages. It might be the rollout of a new CRM platform, a revised agency model that's reshaping roles, performance media shifting in-house, and a new brand strategy that's ready to launch. But is this all? More often than not, the next transformation is already being scoped at the business case stage (AI, anyone?). And looming over it all is the general ambition to be more customer-first, more efficient, more collaborative...

At AAR, we sit inside these change programmes every day.

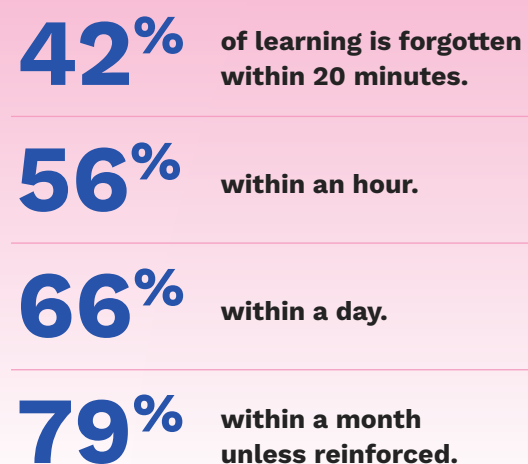
We've learnt that transformation isn't a tidy, linear thing. It's a messy mix of overlapping stages: scoping, piloting, implementing, embedding, assessing and troubleshooting - all happening at once across different initiatives. The idea that change happens in a single wave is seductive. But it's a myth. Most marketing teams are managing transformation in *overlapping cycles*, not single sprints.

Which is why the tools themselves - however powerful - are never enough.

We've seen it many times. And know categorically that without a shift in **mindset**, even the most expensive tech or elegant process redesign can fall flat. Tools alone don't change behaviour. People do. The question to ask isn't just what needs to change - but *who, how much, and in what order?*

Change is cognitive and cultural

Transformation fails not because the vision isn't right, but because the people inside it aren't ready or enabled. According to the Ebbinghaus Forgetting Curve:



That's not failure - that's human nature. Which means that embedding isn't a nice-to-have. It's the battleground.

Sequencing education and reinforcement is critical. We often ask: *Is this a change where 100 people need to make a 10% shift, or where 10 people need to make a 100% shift?* The answer changes everything. The set-up. The pre-sell. The training cadence. The leadership sponsorship. The reward and recognition model.

And yet, many teams are expected to "just get on with it" in systems that haven't been knitted together. MRM tools that don't talk to CRM systems. Workflow platforms that sit outside core processes. Teams encouraged to adopt new skill behaviours that haven't been reinforced, embedded, or coached in. People being told to be compliant to a piece of transformational tech that leads to duplication of work, and the worst kind of change: making them cut and paste from one "kit" to another.

Success needs scaffolding

One of the biggest challenges to success we see in transformation programmes is an unclear answer to this simple question: *What does success look like?*

If your business case hinged on efficiency, are you tracking the right performance data to show that it is landing? If you promised cost savings, are you measuring over-spends and root causes - not just absolute spend levels? If compliance was a core measure, are you checking behaviours and rounds of amends to get to 100%?

Transformation needs more than ambition. It needs rigour.

That's why we focus on three things:

- 1 Purpose, priorities and pace: Are they clear and aligned across leadership and teams?
- 2 Sequenced education: Are the right people getting the right support at the right moment, as and when they need it?
- 3 Embedded performance tracking: Do you have data signals that tell you if change is landing and where it isn't in the process to enable an informed course correction?

As referenced in [AAR's Evolution of the Marketing Operating Model](#) research, over 60% of marketers cite capability and behavioural change as the hardest part of embedding transformation. And ISBA's research into client-agency relationships reinforces this, with only **16% of respondents** saying change programmes feel joined-up across people, process and partners.

Tools are inputs. Mindset is the enabler.

Whether it's a new agency model, an in-housing shift, or a total operating model redesign, one truth holds: change only sticks *when people adopt it*.

This is why we always challenge the idea that transformation should be measured solely by launch dates. Adoption matters. Experience matters. Impact matters.

Our view? It's not about building the field.

In too many transformations, we see what we like to call Field of Dreams thinking: *if you build it, he will come*. (VG note - An oldie but a goodie film with Kevin Costner - way before Yellowstone fame. 🤔)

But that's not how change works. You have to bring people with you, over time, with reinforcement. Asking, exploring, listening to concerns and suggestions. Working out what's not being said as much as what is. Working out the blockers as well as the wins. The question isn't just *'Did we launch it?'* It's *'Did it land?'*

And until marketing leaders focus as much on mind shift as they do on toolset, the most powerful transformations may well remain half-delivered, half-finished and with only half the potential realised.



Process is a compass, not a cage

By Cristiana Spataru

Most marketers didn't fall in love with the industry because of process. We're drawn to ideas. To creativity. To impact.

So, it's understandable that process often gets a bad name. It's seen as something that slows you down or boxes you in.

But the truth is, when work feels chaotic or siloed, it's rarely because there's too much process.

It's because there isn't the right kind.

Smart process isn't an end in itself. It's not bureaucracy. It's not red tape.

It's a compass. It helps you reach your destination faster, with greater alignment and far less friction.



Your North Star needs a compass

In marketing, success doesn't come from knowing just what to do. It comes from knowing how to make it happen. How many great ideas have failed in execution, not because they weren't right, but because the teams couldn't bring them to life?

Your strategy is *the what*. It defines the ambition, the positioning, and the choices that set your direction. Your marketing operating model is *the how*. It brings together people, partners, platforms and processes to deliver that strategy.

They are as interdependent as a North Star and a compass.

The strategy provides direction, but without the tools to navigate, you risk drifting. And a compass without a clear direction might keep you busy, but not necessarily on track.

When the what and the how are connected, teams move with purpose. They align on what matters and know how to deliver it with clarity and confidence.

"Give me the freedom of a tight brief."

David Ogilvy said it best. Constraints are not the enemy of creativity. Confusion is.

The same is true for process.

At its best, process creates structure around freedom - not as a set of rigid rules, but as a compass that gives teams direction and confidence.

- It helps teams focus.
- It accelerates decision-making.
- It creates space for great ideas to flourish without second-guessing every step.

Like a tight brief, the right process does not limit creative potential.

It enables it by pointing teams in the right direction and giving them the tools to get there.

When process works, people feel it

We're often brought in when teams feel stuck - working hard but not moving forward. Too many meetings. Conflicting feedback. Campaigns that stall or go in circles.

And behind it all, a familiar frustration:

"We're doing good work, so why does it feel this hard?"

It's not a lack of effort or talent. Most teams already have the right ingredients. What they need is a clearer path that helps them move with more focus and momentum.

When that happens:

- People feel empowered to act rather than react.
- Time is spent on ideas rather than admin.
- The work flows more smoothly with less friction.

Our role is to help you build your compass and use it with confidence

At AAR, we don't rely on off-the-shelf templates. We work closely with your teams to understand what's working, where the pain points are, and how to co-create something better.

We give your teams the tools and clarity to navigate complexity with confidence - not just once, but again and again.

Process should be:

- Clear where it needs to be.
- Adaptable where it matters.
- Always in service of great marketing.

With the right strategy and a strong process to support it, teams don't just move faster. They move forward with greater impact. And they do it together.

Escaping the triple trap: how CMOs can reclaim time, budget, and trust

By Victoria Fox, Chris Lock and James Witter

Marketing leaders today find themselves stuck in what many now call the “triple trap”: no time, no budget, and no trust. These constraints are not entirely new, but they’ve become more acute in today’s environment of geopolitical instability, economic pressure, and relentless technological change.

Building on a candid panel session at DEPT’s Secret Garden in Cannes, AAR’s Victoria Fox, Chris Lock (LockSmith) and James Witter (PZ Cussons) reunited to delve deeper into this critical topic.

It’s not just a passing problem; it’s a structural issue that risks leaving marketing in a cycle of “movement without progress”. Busy teams, mounting pressure, but little impact.

So, how do CMOs and their teams break free?

Framing the problem: old pressures, new intensity

The roots of the triple trap go deep. Marketers have long battled for budget and influence in the boardroom, but the demands of the last decade have stretched the discipline to breaking point.

“Teams are smaller, but their scope has exploded,” says Lock. “Social, e-commerce, influencers, martech, it’s all piled on top of what was already there. Add economic uncertainty and restructures, and the pressure compounds.”

Fox adds that the sheer layering of new demands – AI today, data yesterday, something else tomorrow – has created a cycle where burnout is almost inevitable. Without a clear strategy, marketers risk ticking off buzzwords rather than making meaningful progress.

When asked how to identify the problem, Chris Lock says the signs are easy to spot once you know where to look: constant restructures, frequent agency reviews, high CMO churn, and campaigns that change as quickly as they launch. The danger? Marketing becomes an execution engine rather than a growth driver.

No time: breaking the cycle of busyness

Where do marketers lose time? Everywhere. From duplication of effort (22 people turning up to a single agency briefing) to firefighting endless board-level debates, inefficiency is rampant.

Witter sees this first-hand. “Marketers are losing precious time under the weight of mounting responsibilities; everything seems to land at marketing’s door,” he explains. “Layer on the endless chase for the next shiny new thing, and it quickly becomes overwhelming. The real focus must be on building brilliant marketing foundations, strengthening capabilities where it matters most to drive brand demand.”

This echoes the solution proposed by Lock; leaders need to “slow down to speed up.” That means investing time in those foundations; clarifying processes, upskilling teams, and gaining alignment at board level. “You only get fast, brave work out the door if your board already trusts your strategy,” Lock notes, pointing to Dove’s lightning-quick COVID response as an example of preparation-enabling agility.

It also means adopting a dual-speed model. “You can’t abandon immediate sales delivery,” he says, “but you must carve out space for future growth.” At Diageo (where Chris spent 9 years in marketing leadership roles), this looked like operating multiple models simultaneously: mainstream brands, premium tiers, near-term innovation, and disruptive future ventures.

For Fox, the message is clear: transformation can’t be a “side-of-desk” project. It requires a roadmap, resourcing, and explicit links to business strategy.

No budget: making the commercial case

Transformation needs investment, but too often, budgets go to campaigns rather than capability.

The answer, says Fox, lies in alignment. “If the enterprise strategy is clear, and marketing shows how its skills and processes deliver against it, you’re not fighting uphill for budget, it’s already built into the plan.”

Lock stresses the importance of speaking the board’s language. You have to present the case for capability from a point that they can understand within their experience. “You’d never let an unqualified accountant run your financials. So why let an untrained marketer spend millions on campaigns?” he asks.

For Witter, this is the key to unlocking investment. “When marketing capability is tied to clear principles and aligned with business objectives, the C-suite listens,” he states. “Developing teams produces more effective work, and more effective work fuels financial growth.”

CMOs must balance rational arguments (reduced agency costs through better briefs, for example) with emotional ones (creativity, professional credibility, risk management). Crucially, they must frame marketing’s role not as cost but as value creation: harvesting current demand while also building future demand, coupled to reducing price sensitivity and improving profitability.

Skimping on skills is a false economy. “Spend £20k training your team to brief better, and you protect a million-pound media investment,” Lock notes. “That’s the multiplier effect.”

No trust: building safety and credibility

Trust is the most intangible of the three traps – and perhaps the most corrosive when it erodes.

Inside teams, Fox argues, the lack of psychological safety is the critical issue. With change accelerating, too many marketers are afraid to admit what they don’t know. “Everyone’s expected to be an overnight AI expert. No one wants to raise their hand and say, ‘I need help.’”

Leaders can change this by modelling vulnerability, rewarding learnings as much as wins, and protecting boundaries so teams don’t race themselves into the ground. “Protect the space for curiosity and bravery,” Fox says. “That’s what creates joy and results in marketing.”

Externally, trust breaks down when weak foundations lead to campaigns that don’t deliver. Boards lose confidence, Sales push short-term tactics, and agencies get blamed. The cycle feeds itself.

The antidote? Stronger upstream strategy, better briefs, and alignment on the true commercial role of marketing.

Protecting the joy of marketing

For both Lock and Fox, joy is not a nice-to-have; it’s the heartbeat of marketing.

Joy looks like bold creative leaps, deep consumer closeness, and the thrill of work that resonates with people to deliver results. It’s what draws people to marketing in the first place.

But joy only survives in cultures that protect it. That means leaders must shield teams from burnout, celebrate experimentation, and create conditions where people can push beyond their comfort zones without fear of punishment. According to Witter, the payoff is immediate and energising. “Carving out time to invest in building capability within the marketing community has created real buzz among our teams and reignited the magic of marketing – reminding us of the art of the possible!”

“Money follows magic,” says Lock. “The best work earns trust and, in turn, earns budget.”

Unlocking the triple trap

So, which lever matters most; time, budget, or trust?

Both Lock and Fox are clear: time is the starting point. With time, you can build better work, earn trust, and unlock budget. Without it, you’re stuck in the doom loop.

Their final advice to CMOs:

- **Invest in people.** Skills, culture, and leadership are the ultimate competitive edge.
- **Break the cycle.** Separate short-term delivery from long-term value creation and put resources into both.
- **Speak commercial language.** Frame marketing’s role in business terms, not campaign terms.
- **Prioritise with purpose.** Manage the seemingly endless requests of marketing through the lens of impact, focus on what truly moves the business forward, and do fewer things brilliantly.



Pitching. Another brilliant idea (that probably won't see the light of day)

By Paul Phillips

I've been consulting to brands on their choice of agency partners for 28 years, during which time I've heard all the arguments on how to improve the pitch process and made a few suggestions myself.

My latest focusses on the global behemoth pitches that last months, sucking the life out of the agency pitch teams involved.

These global opportunities are too commercially significant for either the incumbent or competing agencies to ignore, hence all will always raise their hands when invited to pitch - be it a creative, media or a multi-discipline, all-up-for grabs opportunity.

Can we avoid boiling the ocean?

For what are understandable reasons, these pitches have become a shopping list of requests which need to be completed, including but not limited to...

- 1** A written response to an initial RFI in which granular information is to be provided about all agency capabilities across multiple markets.
- 2** A series of chemistry meetings in which client teams meet agency teams at the centre as well as in the key client markets.
- 3** An RFP is then issued to three, usually four, and sometimes five Holdco's that will consume the pitch team's full attention for the foreseeable future, as well as all the subject matter experts across the Holdco that will need to contribute.
- 4** Pitch briefs are issued that will require strategic and executional responses, often across multiple brands and markets.
- 5** Separate and parallel investigations will take place into specialist capabilities that are of interest – data analytics, sponsorship, shopper marketing, search, econometric analysis, media mixed modelling, CX and UX capabilities, and the ubiquitous questions of all things AI related.
- 6** Then there's the compliance, governance, and legal requirements, some of which is understandably highly detailed - particularly in regulated business sectors.
- 7** There's a workstream on the operational requirements including transition and delivery. Add to this the technological aspects that will form part of the governance required to ensure Martech and AdTech engage effectively.
- 8** Who is going to be working on the business? What's the team structure across the different brands and markets and what's the operating model that will best suit the client circumstances?
- 9** Then, in the case of media pitches, there's the not insignificant matter of media pricing and quality guarantees, together with all associated media trading considerations that will form part of an agency's fully loaded pitch response. All delivered across multiple markets.
- 10** And finally, although I'm sure there's other stuff I've not covered, there's the commercial response to the brief for the next two or three years. Broken down by market and service line.

Each of these requires significant investment in resource and hard costs, from the Holdco, agency and client teams alike, which explain why such pitches can take as long as they do - usually more than six months and sometimes stretching to a year.

Now, I'm not saying all of the above isn't important but here's a suggestion that will save money, resource, time, and - I think most importantly - not at the expense of a lesser outcome.

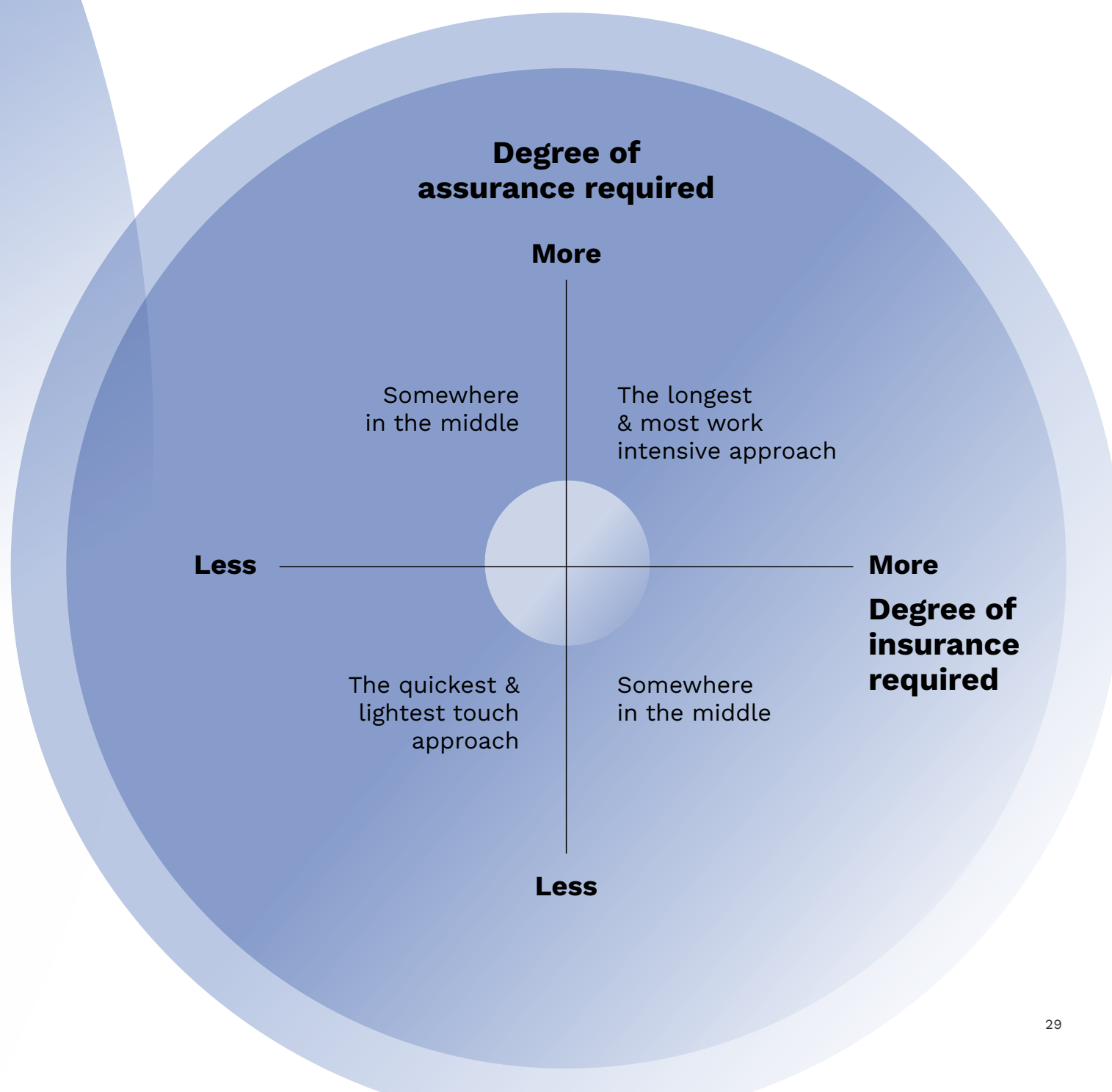
The assurance insurance challenge

All partner agency selection requires a combination of assurance and insurance.

Assurance can be gained through an agency's relevant current and past evidence, essentially a demonstration of what the agency has already achieved for other clients.

Insurance is derived from the confidence in an agency's ability to deliver on a future promise of what the agency can do for the client pitching their business. Essentially, this is the original thinking and work created in response to the pitch brief.

The circumstances and requirements of each client are individual, with the consequence of time and effort required illustrated here.



No agency should be invited to pitch if it cannot meet the client's hygienic requirements (e.g. category, challenge or audience experience, geographic footprint, specific expertise within the agency or wider Holdco family and more). All this information can be gleaned from agencies without too much effort to provide it.

The evidence would indicate that on their day, any Holdco or agency can beat any of their competitors, as demonstrated by the movement of global clients over the past few years. There are times when a purple patch is enjoyed (as would seem to be the case with Publicis Groupe at the moment) but the overall quality offered by the best in the market is of a very high standard.

Therefore, whichever Holdco's or agencies are invited to pitch, as long as sufficient due diligence has been undertaken to satisfy the required level of assurance, all will be capable of doing an excellent job for the prospective client.

A radical suggestion

Having identified the Holdco's or agencies to invite to pitch, all of which have met the assurance threshold, what if the pitch brief was limited to a maximum of two areas into which a deep dive exploration is undertaken, plus a commercial and operational proposal to an agreed MSA?

So, from the above illustrative shopping list of pitch requirements against which a brand needs insurance, two are chosen for pitching agencies to address in their pitch response.

It could be the challenge faced by a particular brand; or how data can be used to target audiences with more relevant messaging; or a new communication platform; or launching into a new market; or employing technology to improve the operational efficiency of delivering global campaigns; or whatever else is important to the brand and affords the pitching agencies the opportunity to shine.

But, crucially, it's not all of the above. In other words, the degree of insurance required is limited rather than the pitching client requiring a response that encompasses *all the colours in all the sizes in all the territories and languages*.

What's the worst that can happen?

On the face of it, such a suggestion could be accused of being unrealistic and lacking an understanding of how corporations and global businesses go about assessing and procuring agency partners.

What's the worst that can happen if such an approach were to be taken?

The upside is a streamlined approach that balances the right levels of assurance and insurance required by the client team to make an informed, confident choice. The time, effort and resources saved would undoubtedly be welcomed by all.

And if this approach proves to be unsatisfactory, then there's still the option to ask for more, safe in the knowledge that agencies are likely to respond to any and all requests to convince prospective clients to *pick me*.

But wouldn't it be great if just one of the behemoth businesses were to try this approach to see if it works.

I'd wager a small beer that it does!

Blending of media and creative: the challenge and opportunity

By Hannah Astill and Rebecca Nunneley

The ability for media and creative to work together effectively is now critical - the key to both strategic alignment and tactical execution. In AAR's [Evolution of the Marketing Operating Model](#) report, 52% of CMOs predicted that the seamless integration of creative and media would be their biggest challenge in 2025, and this comes as no surprise.

The challenge: integration matters more than ever

The proliferation of channels and the need to deliver content at scale in multichannel campaigns that move (to paraphrase Margaret Jobling, CMO of NatWest Group) *"at the speed of life, rather than our internal processes"* has placed huge pressure on CMOs and their teams.

The relentless demand for 'more, faster, better' (with platform-specific optimisation that ladders up to that big, brand-defining idea) means that even with great creative and a strong media plan, a lack of integration can hamper campaigns right from the start.

The traditional *"transactional"* relationship between media and creative agencies, with silos both agency and client side, is no longer fit for purpose. Creative and media must work together to make sure every piece of creative is fit for purpose and will land with the most impact. Where creative and media are aligned from the beginning, brands achieve the right message, right person, right place, right time - and the benefits can be seen in increased marketing, and ultimately business, performance.



Impact on the marketing model

With CMOs navigating issues from organisational silos and misaligned teams to difficulties regarding measurement and attribution, our research has revealed that a desire to take content production and/or performance media in-house has become a key motivation behind undertaking an agency model review. Yet with 41% of CMOs planning to re-outsource their IHA, it's clear that simply leaning on in-housing is not a silver bullet.

Marketing leaders still value external perspectives. Agencies – across both creative and media – can bring a diversity of talent, greater exposure to innovation, and learnings from cross-sector work. They often operate closer to the front lines of market evolution and technological change. Increasingly, we're seeing integrated media-creative briefs as a result, with clients seeking the benefits of cross-disciplinary insight and execution.

Enabling seamless media-creative collaboration

Seamless media-creative collaboration requires a shake-up to the traditional model, where media and creative work hand in glove. Integration allows agencies and brands to produce content with the media plan in mind from the outset – making it adaptable, format-ready, and strategically aligned across all touchpoints. Gone are the days where the performance team can dial off when the discussion turns to brand, and vice versa.

For media and creative teams, working closely together is vital for platform adaptability, from taking the big, beautiful creative and breaking it down into something that would go viral on TikTok, to understanding which five of 20 creative ideas are really connecting with audiences and pulling that insight through to inform later creative ideas. This is creative that's data-informed, facilitating a dial-turning blend of brand-building with performance outcomes.

There has been movement in the market in response to this need, with creative and media agencies both increasingly hiring personnel from the other discipline, and clients sometimes recognising the integrated offerings of certain agencies to consolidate their agency roster.

But must media and creative be under the same roof to make integration possible? We think not. Clients who have set up brains trusts and planning forums (so that they are in the mix together and genuinely close to the detail) can get media and creative in an “incredible rhythm”. No matter what the model architecture ends up being, the important thing is that the two are working in lockstep.

A key watch out, however, is that change is never done. Speaking at our Evolution of the Marketing Operating Model launch event, Tesco's Becky Brock discussed the need for marketers to accept that *“there's not going to be a place where you've got one beautiful creative and a really stable media deployment or media buying. It's going to be much more dynamic.”*

The part where we inevitably discuss GenAI

Generative AI is fast becoming a crucial driver of this evolution. Used effectively, it can support the production of content at scale – particularly for Tier 2 and Tier 3 assets – while also helping to streamline campaign optimisation in real time. When Generative AI is used as a connective thread, it can help to facilitate a feedback loop where creative informs media and vice versa, enhancing overall campaign performance – helping to enable creative thinking and strategic decision making, rather than replacing it.

Opportunity for agencies: leveraging the ‘How’ with the ‘What’

As CMOs reconsider their agency models – looking for not just brilliance but repeatable, integrated systems for achieving it – agencies now have an opportunity to demonstrate their value not only in the ‘what’ but the ‘how’. We are moving away from the time when presenting a strong media strategy or standout creative idea is enough. Clients need to understand exactly *how* it will be delivered and how agencies will bring creative and media closer together.

That means more scrutiny on ways of working, team structure, and operational approach. In the past, the work alone might have won through, but now, agencies that can show a simple and repeatable process of getting to great work and can hold the client's hand through that process, are standing out.

Clients are looking for efficiency that isn't just about cost-cutting, but bringing about increased operational effectiveness. They want:

- Simpler agency models that provide clearer value.
- Fewer silos and more collaboration, internally and externally.
- A consistent creative thread from brand building to performance marketing.
- Reusable assets that can flow through the funnel, empowered by AI.
- Cross-functional teams that understand both performance metrics and brand equity.

Naturally, brand teams are also responsible for bringing this about. It's never going to be a case of engaging a creative agency and media agency and saying, “off you go”. The internal marketing team needs to be plugged into the model to drive results, and this isn't just about right-first-time work, saving time and money, but creating a virtuous circle of better insight → better content → better media → better business results.

When creative and media work together, supported by smart processes and enabled by AI, campaigns don't just run, they evolve – fuelled by feedback, insight, and real-time optimisation – to deliver better campaigns and better customer experiences. This is what we are all striving for: a dynamic, responsive marketing model where insight drives action, where creative brilliance meets media precision, and where every touchpoint is informed, intentional, and impactful.





LATEST NEWS FROM AAR

New year, new AAR website

By Katrina Law

It's almost time for a new AAR website following our recent rebrand. Reflecting AAR's refreshed identity and expertise, the site will showcase how we support brands in redesigning their marketing operating models and managing transformation, as well as the guidance we provide to the agency community in their growth efforts.

For agencies, a dedicated hub will offer a single access point to AAR's sister sites, upcoming events, and other subscriber benefits, making it easier to find the content and resources most relevant to them.

With a modern, user-friendly design, the site will allow all visitors to navigate AAR's thought leadership, case studies, and insights more efficiently. Launching at the end of February, we hope you'll agree that the new site provides a practical, central resource for agencies and brands alike, keeping them connected to AAR's latest thinking and work.

Be sure to visit once we've applied the final touches!



New research for 2026

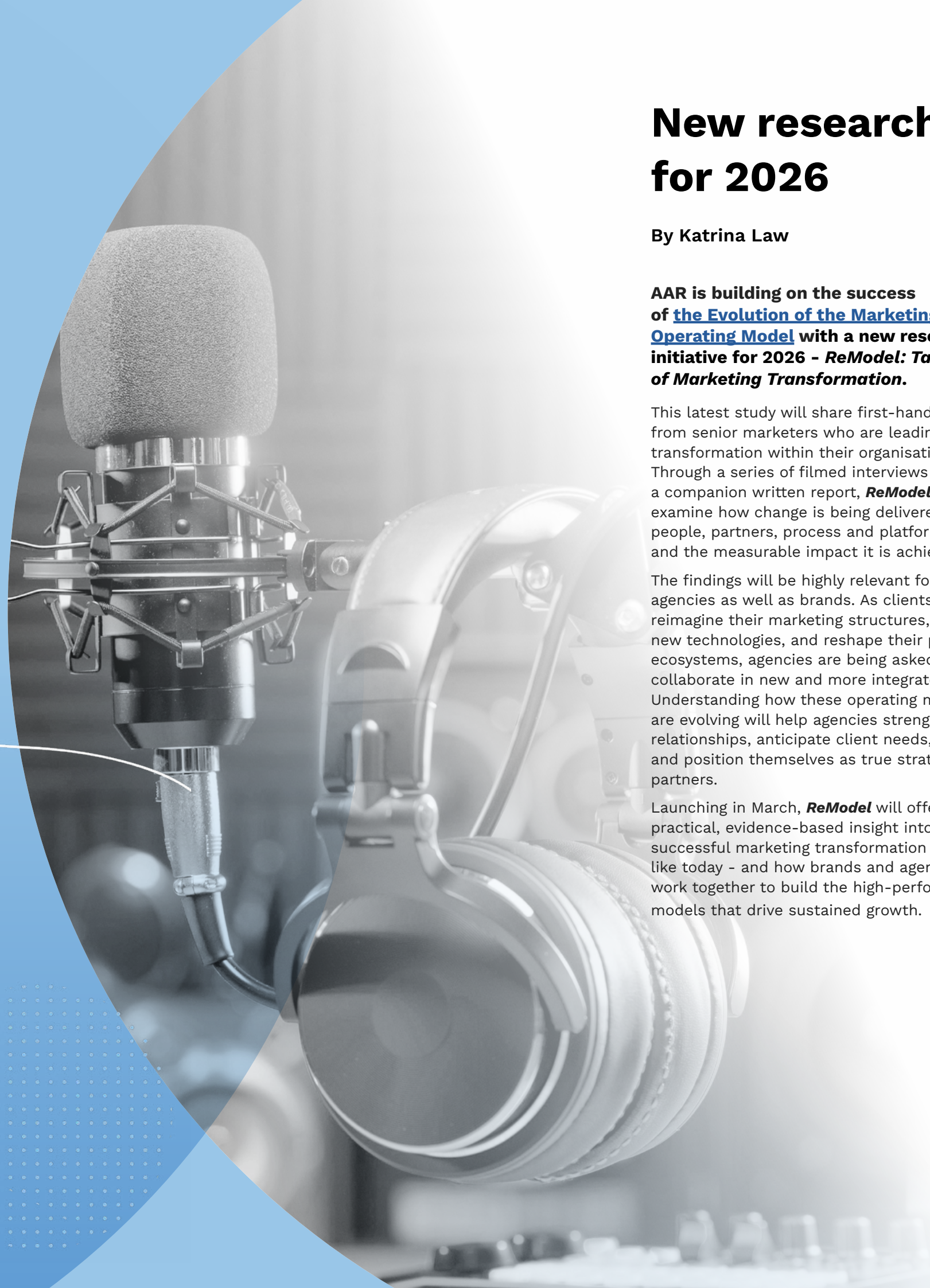
By Katrina Law

AAR is building on the success of [the Evolution of the Marketing Operating Model](#) with a new research initiative for 2026 - *ReModel: Tales of Marketing Transformation*.

This latest study will share first-hand insights from senior marketers who are leading transformation within their organisations. Through a series of filmed interviews and a companion written report, *ReModel* will examine how change is being delivered across people, partners, process and platforms - and the measurable impact it is achieving.

The findings will be highly relevant for agencies as well as brands. As clients reimagine their marketing structures, adopt new technologies, and reshape their partner ecosystems, agencies are being asked to collaborate in new and more integrated ways. Understanding how these operating models are evolving will help agencies strengthen relationships, anticipate client needs, and position themselves as true strategic partners.

Launching in March, *ReModel* will offer practical, evidence-based insight into what successful marketing transformation looks like today - and how brands and agencies can work together to build the high-performing models that drive sustained growth.



Agency Advice Cohort: building a trusted community

By Kate Donaldson

In September, AAR launched the Agency Advice Cohort - an invitation-only community for agency leaders and new business teams, developed in partnership with New York-based consultancy [changeforce](#). While hosted on Slack, this is much more than a platform: it's a trusted space to share insights, tackle challenges, and connect with peers across the industry.

Designed for agencies of all sizes, the Cohort combines AAR's market intelligence with changeforce's consultancy expertise, delivered by consultants who include former agency leaders and growth strategists.

Based on your feedback, we've consolidated the original seven channels into three for sharper, more focussed conversations:

- **Agency Lens** – for agency growth and operational excellence.
- **Client Lens** – insights into brand marketers' priorities and perspectives.
- **Ask Us Anything** – an open forum for quick questions, practical advice, and shared learning.

We've also introduced 'Huddles' - live forums with AAR and changeforce consultants to explore challenges together. Recent Huddles have sparked discussion on transformation, evolving roles, creativity vs. efficiency, commercial pressures, AI's double-edged impact, and the survival mindset shaping tough decisions.

Want to join? Please drop me a line at kdonaldson@aargroup.co.uk.

If your organisation restricts Slack access, let us know - we'll help you find alternative ways to engage.





AAR SUBSCRIPTION

AAR Agency Consultancy – your growth accelerator

By Paul Phillips

Marketing and the role agencies play in service of supporting your clients' success is an ever-increasing challenge. Marketing operating models are more complex than ever: in-house capabilities are more prevalent, technology is re-shaping delivery, and finding the right talent is a constant challenge.

Since 1975, AAR has helped agencies adapt and grow – strengthening client relationships, winning new business, and improving how agencies are run.

We focus on three core areas: **new business, organic growth, and mergers & acquisitions.** Backed by deep experience and sharp insight, our consultancy tailors support to each agency's individual circumstances and ambition.

We know that agencies can help accelerate commercial growth for their clients and, in turn, for their own businesses. The best deliver this through the alchemy of art and science, magic and logic; with a leadership team clear about the agency's strategy and the tactics to deliver. All underpinned by creativity in thought and execution.

Sitting at the intersection of where brand teams and their agency partners meet gives us perspective others don't have, and we use this to help you plan forward with clarity and confidence.

At the heart of subscription is the relationship between our consultants and your agency's leadership and growth team.

Our counsel combines proven services that tackle common agency challenges with bespoke consultancy tailored to your needs. All grounded in real-world insight.

Our Growth Accelerator Services



Consultancy & Insight: expert advice, tools, and intelligence to help your agency grow, win, and retain clients across different operating and commercial models.



Community & Connection: tap into a community of ambitious agencies whose generosity will inspire, share experience and learning.



Training & Development: improve how your teams operate, collaborate and deliver for your clients as well as each other.

The AAR Growth Accelerator Seminar Programme

By Tony Spong

Sharpening your competitive edge in 2026

Here at AAR, we have the privilege to sit at the best watercooler in marketing. Brands and agencies are always stopping by for a chat as they fill their metaphorical water bottles.

The 'privilege' comes from them feeling that they can take a moment to relax and gain a valuable respite from the relentlessness of today's marketing challenges to mull things over with us.

Over the last five decades we have been uniquely skilled at turning these 'chats' into valuable insights that not only provide agencies with the context to these challenges, but also in identifying the key areas of focus that help agencies sharpen their competitive edge, and the vital skills needed to do so.

Our exclusive programme of support is designed to help you win and retain business. From one-on-one agency support, to taking a fresh look at the skills you need today and those of the future, to providing the time and space for you to discuss and share your experiences with your peer group, our aim is to bring you new ideas and perspectives to take away to both sharpen your current success as well as offer the potential to create those new winning formulae that drive our industry forward.



We have a packed agenda for 2026 with, we believe, something for everyone.

Running an agency, or indeed any business, has always been tough but a swirling mix of external factors on top of those from within our industry highlights the need to make space to share and discuss how we are all doing. With that very much at the forefront of our minds for 2026, we will be hosting three breakfast gatherings throughout the year, as well as running the next in our series of 'Walk the Talk' events on the South Downs in May exclusively for agency leaders to do just that.

For our core programme, we are excited to add to our now well-established **Business Development Academy** course for those new-to-new business, a seminar for those new to pitching. It has become ever more stressful and no longer seems to generate the same levels of volunteers that it did in the past. **Paul Wilson** explores how we can better deal with the many emotions of pitching, ensuring the wellbeing of all those involved.

On the theme of winning more business, we were keen to explore how new business teams can use AI to transform how they find leads, research prospects, build decks and tell sharper stories. **Matthew Kershaw's** seminar will show you how it can turn a day's prep into an hour's work – if you know how to use it.



Trenton Moss will help you drill down into some of the nuances of winning business by creating more empathy for the different communication styles of your clients to convert more opportunities into growth.

The breadth of content now produced by agencies, not only in the work they do for clients but for their own marketing, is vast. Which is why we thought it would be fascinating for journalist **Vino Vethavanam** to share her thoughts on how you might reframe your agency's output through the lens of editorial thinking; the processes, mindsets and governance used by the best editors and publishers, showing how agencies can apply them to create more consistent, resonant and effective brand narratives for themselves.

Insights continue to emerge from our groundbreaking '[Evolution of the Marketing Operating Model](#)' research that we're keen to share, as well as identify the areas on which we think you should focus.

A key piece of insight has been the shift in focus onto the 'how' of marketing and the recognition that current ways of working need to change.

An example of this has been the emergence of what we called '**The Collaboration Paradox**', something we've shared our thoughts on with posts on LinkedIn and a Walk the Talk event with agency leaders in 2025. We are passionate that

we maintain momentum in 2026 by unpacking ways of working further between clients and agencies so that all this change is not wasted by drifting back to what is familiar and comfortable.

Creating a culture where psychological safety is baked in has been identified as foundational in realising the shift to a new marketing operating model. The wonderful team at UNLRN will share with you what Inclusive Leadership entails and how that can engender greater outcomes from improved collaboration among your teams.

While AAR's very own dynamic duo of **Vicky Gillan** and **Tony Spong** will share their latest and unique insights gathered from what clients say to us from the two perspectives of pitching and existing relationships to give you a peek round the corner into the client's world to see which doors are open, closed or slightly ajar in terms of opportunities for growth.

To dovetail with these new opportunities, we wanted a fresh procurement perspective on how best to approach a client during a period of change - when you can see the value you can add and, equally, how to defend your scope as everything shifts. **Nina Chande**, formerly of Unilever, PMI, Sony, and Sky, will be sharing her insights.

To help stitch all this change together, we are going to need to develop new skills and give greater focus to the development of our talent.

Vonnie Alexander will be sharing her Lessons in Leadership to help leaders and emerging leaders adapt to this new environment. **Rachel Raphael** will also outline her roadmap for developing M-Shaped talent - generalists who can coordinate and collaborate effectively with the growing number of specialists, not only within your agency and the client's organisation, but across the wider operating model.

We know that finding time away from day-to-day workloads is difficult and there is always a reason not to do it. To help, we will be starting

our sessions at the earlier time of 9.15am and keeping running times to 2 hours to help manage your day.

Please review the programme and share with those in your agency who you believe will benefit the most and put holds in diaries now. We officially open bookings 3 weeks in advance of each session. 😊

Finally, we value your feedback enormously so please continue to share that with us.

Many thanks and have a great year!

SUPPORT PROGRAMME FOR 2026

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|-------------------|---|------------------------------|------------------------------|
| Wednesday 21 Jan | Inclusive leadership: Skills for leading collaboration in diverse, hybrid teams | UNLRN | Online |
| Wednesday 25 Feb | How to deal with the many emotions of pitching | Paul Wilson | Online |
| Wednesday 18 Mar | Show more empathy: Win more work | Trenton Moss | Online |
| Wednesday 15 Apr | Developing M-shaped people | Rachel Raphael | Online |
| May - TBC | Walk the Talk 2 - Agency leaders' seminar | James Renwick & Anni Townend | In person on the South Downs |
| Wednesday 20 May | Reframing your agency's output through the lens of editorial thinking | Vino Vethavanam | Online |
| Wednesday 17 June | Pitch smarter, not harder | Matthew Kershaw | Online |
| Wednesday 16 Sept | Dealing with procurement | Nina Chande | Online |
| Wednesday 14 Oct | How to stay ahead when everything is shifting | Vicky Gillan & Tony Spong | Online |
| Wednesday 18 Nov | Lessons in leadership | Vonnie Alexander | Online |



AAR Spring Integrated Business Development Apprenticeship: Levelling up with SEGA in 2025

By Hannah Astill

On 18th March 2025, we kicked off our first Integrated Business Development Apprenticeship, bringing media and creative cohorts together for our biggest ever training programme.

We launched this integrated offering to meet the increasing demand from clients for better cross-agency integration, led by Paul Phillips (Partner), Rebecca Nunneley (Lead Creative Consultant) and myself (Lead Media Consultant).

The IPA and IDM accredited course ran in an in-person setting for six weeks, a highly pragmatic course during which we shared our 50 years of learning and many, many lived stories all in service of delivering best practice advice on how to smash a pitch process (or Level Up in new business).



Team 'Atom' celebrating their win

We also invited industry new business and growth titans Lucinda Johnson, Group Director, Marketing and Business Development at OMG and Stephanie Brimacombe, EMEA CEO, VCCP to share their invaluable insights on all things new business and pitching. A real jewel in the crown of the course.

The course included a lot of practical exercises that centred around SEGA, with the wonderful Matt Whittles (Senior Media Planning Manager) and Milly Cutler (Junior Media Planning Manager) joining us from the iconic 80's gaming brand.

Six teams made up from delegates across media and creative agencies each created their own agency to produce a written response to an RFI and participate in a mock chemistry meeting in which they presented directly to Matt and Milly alongside Rebecca, Paul and myself.

We all agreed it was the highest calibre cohort we'd seen, with so much creativity displayed in the written RFI responses and chemistry meetings. All of the made-up agencies took inspiration from culture to develop their agency proposition and presentations including off licences, gaming puns aplenty, and the AAR team were even anthropomorphised into gaming avengers in a magazine takeaway. Beware Paul Phillips' anecdote attack!

Of the winning team, Matt commented that he 'forgot they weren't a real agency'.

A big thank you from us to all those that attended and participated with great enthusiasm.

From the feedback received 100% described the course as insightful, informative or engaging with 80% saying it was enjoyable and fun.

Though perhaps most importantly, 80% agreed that they'd already implemented learnings in the workplace before the course had even finished.

If you want to supercharge your new business talent helping them to become a new business ninja, then make sure you [sign them up for our next course](#), renamed the Business Development Academy, coming in Spring 2026.



Paul Phillips immortalised in gaming form as "Brand Brigadier"



Hannah Astill "Captain Consultant"



Rebecca Nunneley "Creative Champion"

"The AAR Integrated Business Development Apprenticeship was a genuinely unique experience. It brought together a diverse group of people from various agencies and backgrounds, creating a dynamic environment where we could collaborate and build something both distinctive and truthful."

"Coming into the course with little prior experience, I was surprised to uncover hidden strengths - unexpected "Easter eggs" within my own skill set - that I could contribute to the process."

"The feedback throughout was insightful and enriching, and although the final pitch was simulated, the experience felt real and impactful. It challenged and shaped me in ways that will stick far beyond the programme."

**IZABELLA GYARMATI, STUDIO COORDINATOR,
UNCOMMON CREATIVE STUDIO**



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