



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

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### **Introduction**

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

Historically, academic studies looking at advertising have centered their attention on the nations of the North Atlantic, due partly to the concentration of scholarly publications in these countries. However, recently a particular emphasis has been placed on the BRIC group (Brazil, Russia, India, and China), due to the fact that in recent years their economies have grown four times faster than the rest of the world and are expected to continue to exhibit growth in the near future, including advertising expenditures (King, 2007; Anonymous, 2013). The focus of many of these studies has been on how advertising works in these markets and how to make it more effective and, to a lesser extent, on the structure and practices of the local industries themselves. Although this is a positive step forward for the discipline, there is a need for more scholarly research in the field of advertising in other markets.

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

There is no single definition as to what AP is. In fact, there are as many different definitions of AP as there are corporate cultures that have adopted the practice. Bendinger (2008) defines it as follows:

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

According to Steel (1998), AP was born out of the need for advertising strategy to focus more on consumers and less on the “hunch” of creative teams. As such, it has been generally recognized to be a “best practice” by practitioners in the United Kingdom (UK) and the United States (U.S.), where it originated and matured before being exported to smaller markets (Patwardhan, Patwardhan, & Vasavada-Oza, 2010). Most mature advertising markets throughout the world have now systematically adopted AP. The extent is such that many industry leaders have created chapters of the Account Planning Group (APG), a professional organization of planners that is now present in several nations.

The Mexican advertising industry, having been grossly overlooked in the academic literature, is ideally suited for this study not only because of its proximity and ties to the United States but also because of its sheer size—14th largest in the world (Barnes Reports, 2008)—and because it is primarily controlled by multinational agencies. Additionally, in 1993, Mexican advertising expenditure totaled \$1.7 billion (García Calderón, 2007); by 2012, after many ups and downs since the financial crisis of 2008, it has reached \$6.3 billion, and by 2014 it is expected to be \$7.2 billion (Barnes Reports, 2012).

This growth has brought with it a series of changes in how advertising is planned, developed, and executed in Mexico. Among these changes is the incorporation of AP into the organizational charts of most international agencies operating in the country. However, considering that the discipline has been adopted differently in diverse nations (Butcher & McCulloch, 2003; Crosier, Grant, & Gilmore, 2003; Patwardhan et al., 2010), it is important to understand how a country such as Mexico has embraced it, not only because of that country’s unique circumstances but also because of what it might mean for the advertising industries of other, similar, nations and of the world as a whole.

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

However, studies with different theoretical frameworks of reference have informed the field in recent years. For example, agency philosophy (which is rooted in an agency’s culture) has been considered a deterministic factor in client-agency relationships. Studies have reinforced a move within the discipline to focus on the impact that agency philosophy, or corporate culture, has on practices (Butcher & McCulloch, 2003; Crosier et al., 2003; Patwardhan et al., 2010).

### **Research Purpose and Significance**

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

First, tracing the emergence of the process by which the Mexican industry adopts AP will contribute to the overall theory formation of the role that AP plays in the development of advertising strategy. Second, if there is a systematic process of adoption, this study will also provide a benchmark for future comparative studies with other nations. Finally, a direct exploration of the elements related to the adoption of AP that are unique to the Mexican industry will contribute to the literature on globalization of business practices, as well as the way in which they are "glocalized" to respond to the needs of different markets, by examining a cognition model of organizational culture (Kraidy, 1999; Weick, 1985).

### **Research Questions**

The expansion of advertising conglomerates into developing nations in the last 30 years has had a profound impact on local industries. This change has not occurred solely at the level of market share and profit structures. It also means that the way advertising is planned, developed, created, executed, and evaluated has become a reflection of the systematized business models under which most corporations have expanded (Ghoshal & Westney, 2005; Leslie, 1995). However, the literature also suggests that host nations are not passive recipients of business practices imported from abroad. In fact, most of the time a process of globalization occurs, and adopted practices conform to the realities of the local market (Kraidy, 1999).

For the purpose of this study, GT has been selected as the best methodology by which to explore the problem. The last few decades have seen a paradigmatic shift in the way researchers find answers to the questions that interest them. GT research today spans most disciplines in the social sciences, and it informs studies for which no theoretical framework has yet been developed. According to Morse (as cited in Goulding, 2002), a GT is

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

Although primarily used by qualitative researchers, GT has both canons and procedures that can be systematically evaluated as strictly as those used with purely quantitative methods. Through these means, a researcher can be rigorous enough to provide measures of theory-observation compatibility, consistency, reproducibility, precision, and verification. Further, one of GT's principle outcomes is a model-based theory that concentrates these canons (Corbin & Strauss, 1990).

Considering the dearth of research in the field, and in the absence of any preconceived notions about this phenomenon at the time when this project was being developed, the following questions will inform and direct the study:

1. What do Mexican planners consider AP to be, and what are its roles, both perceived and real?
2. How is AP put into practice in the Mexican advertising industry? How is it evaluated, and when is it considered effective?
3. What are the present limitations of and future outlook for AP in the Mexican advertising industry?

### **Study Design and Method**

Face-to-face, in-depth interviews were selected as the most appropriate method for the study. The questionnaire used 10 open-ended, semistructured questions to guide the discussion, developed in both English and Spanish. According to Creswell (2007), using a flexible semistructured questionnaire in terms of questions and probes allows researchers to adapt to the realities of the interview without compromising the validity of the study.

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

Within a period of two weeks, a total of 18 advertising professionals, all of them involved in one way or another with the functions of AP within their respective agencies (including freelance planners), had participated in the study. Though all the planners work in the Mexican industry, they have very diverse backgrounds (as is described in Table 1).

Though the nature of the research questions and methodology does not require randomization or representativeness, this appears to be a reflection of what the discipline is like in the Mexican industry. The interviews were conducted wherever the participants felt most comfortable. Six participants agreed to meet in public places, mostly cafés, and the rest of the interviews took place in their offices.

All interviews were recorded with a digital voice recorder and then transferred in digital format to an external drive and a computer hard drive. Subsequently, they were transcribed.

**Table 1. Participant Characteristics.**

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

Once the transcription was finished, the categories were classified under different themes that had emerged using the constant-comparative method (Creswell, 2007; Lindlof, 1995). When the data had been arranged, participants were e-mailed for clarification when needed. This was done as a member check, since going back into the field was not logistically feasible. However, the response was positive in all but one case. Through the use of GT, the initial themes that emerged were classified into core categories and then aligned within a theoretical framework from other disciplines when necessary.

## Results

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

1. What do Mexican planners consider AP to be, and what are its roles, both perceived and real?

There is a rather diffused consensus that it is early in the stage of the discipline in the local market for AP to be as clearly defined as it is in the British or American industries. Consequently, the roles that planners assume will depend on the expectations that both the agency and the client have of their work. As Daniel, a planner who worked in several agencies but now is a consultant states, "There are as many definitions of AP as there are ways of practicing it."

2. How is AP put into practice in the Mexican advertising industry? How is it evaluated, and when is it considered effective?

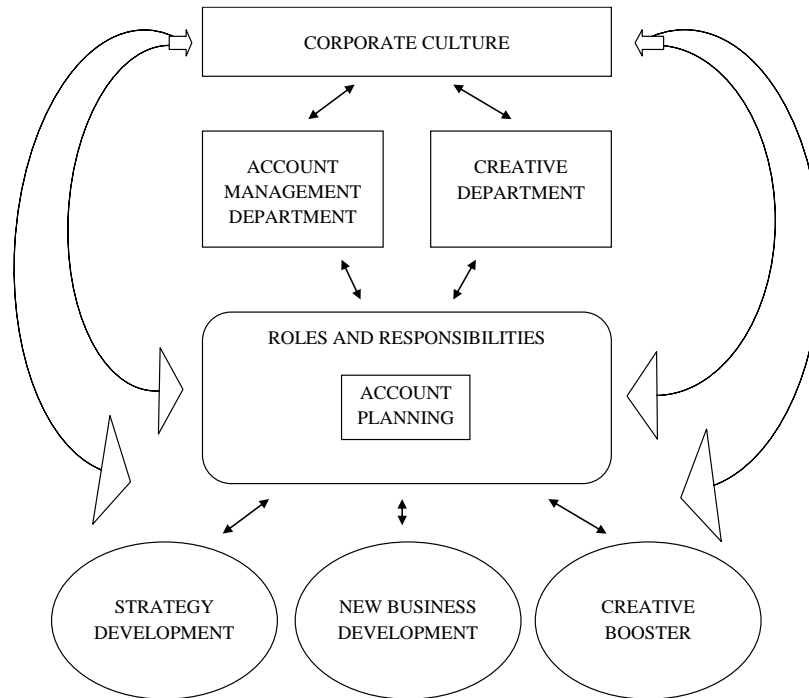
Participants were clear that AP does not exist outside an agency's ethos—that is, AP is defined by the agency's corporate culture, more than by the discipline itself. There is no clear evaluation or measure of performance, and in the overwhelming majority of agencies, the only feedback a planner receives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

3. What are the present limitations of and future outlook for AP in the Mexican advertising industry?

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

In addition to these questions, a series of underlying issues arose from the interviews. Following is a discussion of the findings, the main one being the diffused conceptualization that AP seems to have throughout the industry. This was an underlying issue in the way planners describe their working conditions, their interaction with other departments, how their work is evaluated when it is considered effective, and the obstacles they face. These categories are represented in the tentative model developed

to illustrate the findings of this study (Figure 1).



**Figure 1. Account planning in the Mexican advertising industry  
The Defining Role of Corporate Culture in Conceptualizing AP.**

According to organizational cognition theory, culture is not something that exists on its own, outside of the context of interaction among its members (Weick, 1979). Furthermore, culture is a way of thinking that is shared by members of an organization.

An organization's culture is "learned" by its members as they adhere to it and recreate it for other members (Eisenberg & Goodall, 2004; Weick, 1985). Considering that agencies are not monolithic cultural entities, but in fact have very distinct differences among their departments, it is necessary to include the concept of subcultures. This need to account for overlapping subcultures within the same organization makes organizational cognition the best fit between the findings and the theory. First developed by Weick (1979), organizational cognition, as its name indicates, focuses on the researcher's knowledge of the subjects being studied:

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

The focus of this paradigm on actions and patterns as the building blocks of shared culture make it an ideal frame of reference to study the practices within organizations (Weick, 1985). The corporate culture of the agencies where the participants worked was the single most important determinant of the manner in which they conceptualized AP, but this culture was created by the interactions between the different departments and the perceived needs of the group as a whole.

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

This indicates a conflict in the planners' interpretation of AP as a discipline outside of their agency. If AP is what their corporate culture says it is, then its character as a discipline outside becomes problematic. However, the staying power of the corporate culture in regard to AP went beyond the planners themselves. The existence of diverse subcultures within the same agency or industry, based on each department's operational functions, does not preclude that there can be an overlap that allows flexibility independent from the organization (Weick, 1985).

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

### ***Roles and Responsibilities of Planners***

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

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

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



creative, results.

Finally, a few agencies that do not have a long experience with AP have opted for letting their clients decide what the specific duties of planners will be in regard to their particular account. One such scenario was the agency that had had three different models of planning in recent years. The participant who had gone through this felt he was a "superplanner," even if he preferred not to be called that. Patwardhan et al. (2010) found a similar situation in the Indian industry, where planners had to adapt to be all things when clients demanded such, and the agency itself did not delineate responsibilities through its corporate culture.

### ***Expected Outcomes of AP Within the Agency and the Industry in General***

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

In the area of strategy development, the corporate culture tends to be focused on satisfying the client's business needs, regardless of the creative energy invested in the final product. For some clients, creativity is secondary to strategy, and this is evidenced in their relationship with the agency that holds their account. However, some of the participants dismissed this function as obsolete or "old school" when it is its own end. The reality is that the vast majority of planners do this in their day-to-day performance, though some see it as secondary to their contribution to the creative process in and of itself. But behind every creative idea on which a planner works, there should be strategic thought.

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

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

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

Finally, the area of new business development is a combination of the two. For many planners, this is the ideal balance, and unfortunately, it truly only happens when they are pitching for new accounts. For example, Adam, a planner who has won several accounts recently because of good AP, laments that once the account is landed, he rarely gets to work on it again. When he does, it is either to go over the strategy developed by an account executive, or to check with the creative department on whether the execution is still on strategy. This leaves him frustrated, as he believes it sells the client and the agency short. AP is most obvious in the process when the agency is pitching for new accounts, and if the agency were to continue to rely upon AP once it had signed a client, there would be better advertising, happier clients, and more business overall. The majority of participants also felt that new business development is a unique outcome that has nothing to do with the day-to-day operations for an existing client. If clients themselves were to start demanding that the planning promised during the pitch be incorporated into their ongoing relationship, agencies would have to increase the size of their AP departments, something that might not be financially feasible in the near future.

### **Conclusions**

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

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

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

Finally, the outcomes of AP are directly correlated with the previous two issues. Though these issues overlap and feed off of each other, planners themselves could identify them distinctly in their day-to-day operations. They did not seem interested in being asked to stop being strategic so that they could become creative, and still less when the possibility was reversed. It seems that planners worked best and were happiest when they were able to combine these functions, as in the case of new business development. It might serve planners well to make this a crucial issue of the APG's agenda.

These findings go beyond documenting what is taking place in the industry. They offer an incipient view of what happens when practices developed in mature industries make their way to developing markets by way of multinational corporations. The lack of uniformity or consistency in the way the discipline is practiced in the Mexican industry is indicative of the nonorganic nature of AP in that market.

### ***Limitations***

This is a field in which little or no research has been done, and the literature is almost nonexistent. However, the use of GT enabled the data to develop a blueprint of where this study needs to go next. This does not mean that positioning this study within the overall literature on AP and advertising in developing nations is simple. It is still necessary to relate it to the work that other scholars have done. Furthermore, it is imperative to tackle the issue from a different perspective, that of advertising professionals who work with planners. The present study included a variety of voices within the realm of AP, but because of its exploratory nature, the study failed to collect the experiences and perceptions of creative and account management advertisers.

Another issue of concern is that axial coding—going back to the field for more data once the coding is initiated and deficiencies are detected—is very important to GT. Unfortunately, because of logistics this was not feasible, and e-mails were relied on instead when clarification was needed. However, though the response was positive, the messages lacked the depth and richness that only face-to-face interviews can provide.

### ***Recommendations***

As the impact of globalization on different realms continues to receive scholarly attention, similar studies will continue to inform the research agenda of academics worldwide. Recommendations for furthering this research apply to two different levels. First, it is important to continue documenting the impact that AP as a discipline is having in different markets. It is recommended that future research evaluate the role and impact that APG will have in the industry as a whole, but more importantly, among the planners individually. Though it is novel within the repertoire of business practices, strategizing, which lies at the heart of AP, is not. It seems to be both necessary and sensible to conduct similar studies in countries that have established APG chapters in order to advance the discipline. A constant complaint from the participants was the lack of training of local planners both academically and professionally. Whereas APG is developing a plan to address the latter issue, the former is mostly ignored. In order to come to grips with this matter, academics must develop a program based on the realities of the local market.

Studies such as this one can facilitate this project.

Second, it is necessary to continue pursuing research in industries that fall outside the North Atlantic development model or the BRIC group. Although research in these particular regions is important, this limited perspective excludes a large part of the world. The Mexican industry, like most of its Latin American, African, and Asian counterparts, has been largely overlooked in the academic literature. This has a negative impact on the local industries, on the academic communities in these countries, and on the corporations that conduct business there.

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

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

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