

Let's give MRS. M&S a good seeing to...



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This document is a response to the challenges facing Marks & Spencer and demonstrates how The Magistry could be the vital strategic partner to reveal the company's relevance to the UK's 21st century shopper - even though it's relevance has been so cunningly concealed for some time.

Marks & Spencer (M&S) isn't Harrods, or Harvey Nichols or Army and Navy; the core problem is that as a Department Store in denial it isn't distinctively M&S either. Armed with this insight The Magistry can either create the fitting template as a Department Store, or provide a bespoke strategic outline for M&S as a national fashion store.

Some businesses falter through lack of footfall, location, or goodwill; what's the excuse at M&S?

From time to time all businesses suffer crises and calamities, it's the nature of life and by definition the nature of everything else too, the knack is not to compound the crises and calamities into a complete catastrophe.

When Challenger fell so dramatically and tragically from the sky, a distraught Ronald Reagan turned to Buzz Aldrin seeking an explanation; Buzz simply said 'Mr President, this is rocket science.' Retailing isn't. Shops are a simple equation.

All retail businesses strip down to location, environment, product, cash, customers, while the delivery mechanisms and processes which ultimately serve the customers can be made as complicated as the incumbent (or recumbent) management permits.

Our aim is to support you, the new management, in solving 'simplified' equations, so that you may build-upon the successes you've enjoyed previously, and restore the fortunes of M&S.

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## We're in a bit of a M&S

**B**ut which bit?

Oh to be wandering through M&S, because wandering suggests a sense of relaxation. In M&S you bumble around hoping to find a sign or better still something worth buying.

It's not all bad. Per Una has, at the insistence of King George a distinct personality and it's own fixtures. These fixtures even go higher than the traditional 5' 4" height limit set by the retail height police back in 1947 - those guys had never seen a kleptomaniac dwarf in action!

I recently wandered around M&S in Richmond (which is where we are) with a colleague to get the lie of the land and pick up a magazine\*. First we thought to grab a sandwich, as we wouldn't look suspicious - just wandering around as if 'casing the joint'. We couldn't help but look suspicious. No clear signage, no clear adjacencies, no space to gather ourselves, and this was without any hustle or bustle. Imagine if the place was busy, and as this was Tuesday lunchtime, it should have been.

The sandwich chillers were placed far right somewhere behind Castle Per Una. When you finally found them there was further confusion as to where the queues for the quick check-outs began - it was obviously the furthest point from the cabinets to create totally unnecessary traffic. But it was to drive customers past carefully considered impulse purchases right! Er, no.

We tried a proper check-out. The lady on the till was very nice and told us that the magazines\* were near the door (where we came in) and FREE. So we made our way back to the door and found the magazine stand - and the magazines are actually a quid. So it's back to the nearest Please Pay Here to meet a totally un-engaging young man behind the counter. We won't mention the carriers because they're not worth mentioning.

Let's go upstairs while we're here.

Suits are displayed with the same discrimination as in a dry cleaners. You probably could find yours, but is it worth the trouble and someone has gone to all that trouble to make them all look the same?

There's the post Fathers-Day fallout cluttering up the floor and someone has had a brilliant idea to cash in on Euro2004. There's a goal and some England stuff and it all seems balls.

There's no coherence when things need to hang together, and ad-jolly-hoc-key sticks. That might have worked in the 1950s when Joyce Grenfell was considered funny (and funnily enough she was still alive). But this is the 21st century.

My colleague asked with real concern, "Why do M&S *always* get the details wrong?"



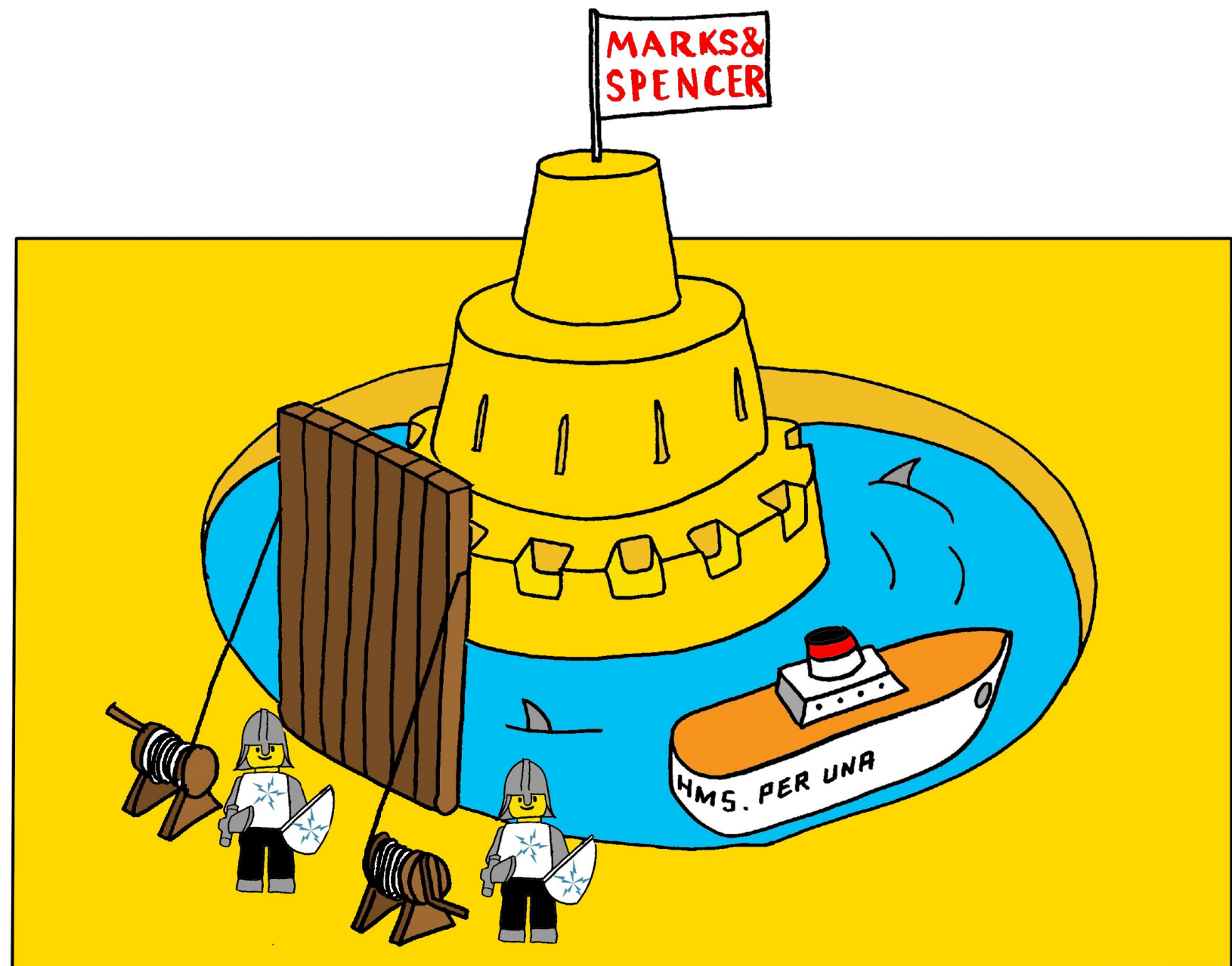
## Helping a DM&SEL in distress

It's a sobering thought that the best bit of M&S isn't.

'Una Per Loma Blanca', as a brand responsible for 50% of your womenswear sales within the business\*, isn't even owned by you, the host retailer. Imagine being all at sea and knowing that your buoyancy aid could be taken away at any time (contractual caveats permitting). It's like being caught in a Talking Heads song "How did I get here?" One has to wonder if the heads had the brains engaged while the mouths were moving to 'dictate' terms.

In the short-term Per Una must remain as the cornerstone of the M&S ladieswear offer, but it can not be permitted to become a millstone.

\*Source: Sarah Ryle | The Observer May 23, 2004



# Will the real EMNESS please stand up?

In an increasingly time pressured and confusing world, shopping is one area of people's lives where they feel they can exert some control.

If we compare yesterday's consumers with those of today, we see change from the relatively passive, constrained individuals (whom retailers treated as 'customers') to proactive, more powerful retail-savvy shoppers, who want to be considered as "individuals".

The target audience for the M&S brand is broad. And it is this 'brand-stretch' that leads to a lack of definition. By being 'all -things -to -all -men', no-one really knows what M&S is or who it's really aimed at. In an increasingly individual world, M&S tries to be "exclusively for everyone". It just doesn't work like that.

The store layout and product adjacencies are confusing too, leading to customer discomfort and confusion. They seem to be laid out from an operational or buying perspective and not from that of the customer.

The obvious *clash* of marketing messages and visual merchandising ambience, devalues your efforts even further.

M&S have managed to disenfranchise its core customers.

M&S are dictating their values and aesthetics on them. Although not all of these values are bad, they have alienated people and they are getting tired of it. People want to be engaged, nurtured and, thus feel valued.

M&S needs to establish a more human approach, which is in-tune with its real customer base. M&S needs to have and show greater audience definition.

*"I just don't understand what M&S is all about any more. I can't seem to find what I want any more. It's scattered all over the place and is really hard to find. They put "trendy" stuff next to stuff that's for old ladies. That can't be right, can it?"* 46-year-old woman.



## Marks and no Sparks

**E**xclusively for everyone.

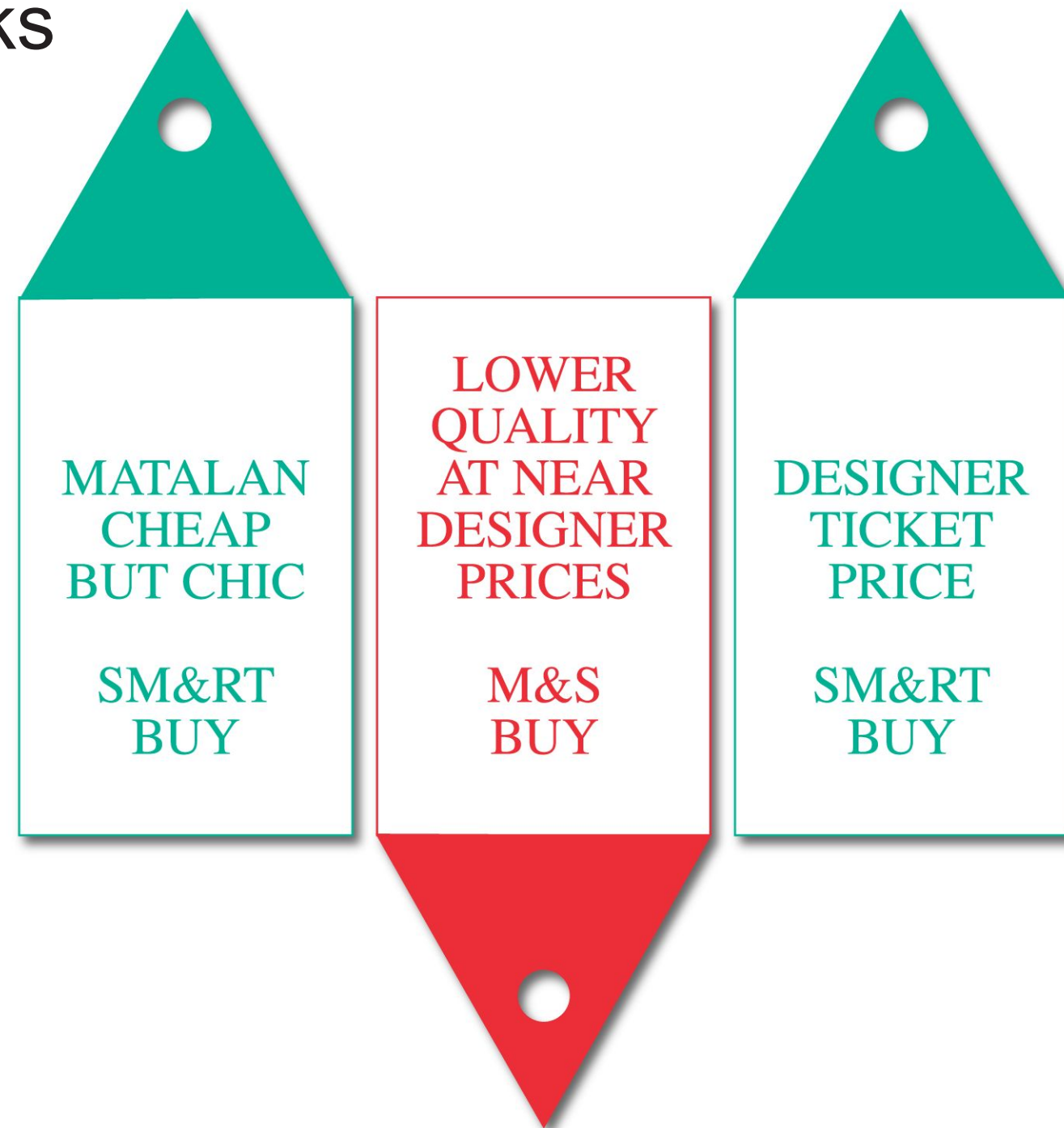
A slogan or an admission?

Having failed to identify the M&S customer your predecessors thought (or didn't) let's embrace everyone; in the words of the opening theme for Only Fools and Horses "black and white, rich or poor, they'll come knocking at our door"... and the delivery vans will be yellow reliant robins;-) Exclusively for Everyone is a non-sequitur i.e. it doesn't follow. Some people said it was a great slogan! But then again some people told the emperor they liked his suit. "M&S isn't it?" they said.

Exclusively for everyone translates into an 'everything for anyone' merchandise range and culture which translates into a 'not for me' reaction.

It's not just the slogan that's an oxymoron, M&S are no longer about Merchandise and Service, the great Empire's Emporium, you're torn - torn between competing with all the other lo-mid range retailers importing garments from the latest Enterprise Processing Zone, or perhaps Turkey - while wistfully looking back and thinking about the halcyon days. It's never been smart to pay too much for anything, and Marks isn't a smart choice. You've got the same visual values as Matalan with Army&Navy ticket prices.

There are exceptions. Food is great but Justin's gone to Sainsbury's, and Per Una is now not just one but *dué*. So, the high points within M&S are food and 24-35 ladieswear.



## Where's the difference?

The British people are an eclectic bunch; a magpie nation adopting the best of the world's goods and culture, making it their own.

As an island race, with a sea fairing tradition, British-style is a marriage of styles from around the world, interpreted to suit our landscape, people and character. Despite a complex layering of styles, a strong design lineage exists... understated lines, functional bias, but bags of character.

M&S used to understand this British point of view. Its products were functional and practical, but it had a "well travelled" feel too. Have M&S forgotten what people loved them best for?

M&S can no longer be defined by 'service, value and quality'; these are now just 'hygiene factors' in a world that demands nothing less. M&S needs to build real values (not just value) and definition.

By adopting the levels of staffing/service and the visual aesthetics of "price driven retailers", M&S no longer feels special. It is neither 'bargain' nor 'luxury'... it's middle-of-the-road; as unfashionable and unforgivable in retailing as it is in music...



“Even if you are  
on the right track,  
you will get run  
over if you just  
stand there.”

*Will Rogers, Hollywood's Cowboy Philosopher.*

## George Best + Bobby Charlton

**W**e've all been to that seminar about negotiating skills and the 9 core leadership types: power through information, power of expertise, situation power, charismatic power, power by title, the power to reward, the power to punish, and power by association. The latter is often referred to as reverent power. The last is power through consistency, and this applies as a brand value. But when consistent means the same, as in 'same-old, same-old' it's a total turn-off. It's the difference between doing fashion and doing fashion-able.

George Best used to be the Brit that we wanted to play for England. Alf Ramsay wanted to change his passport. Then we had the King of the Combover - Bobby. They're both great but somewhere in the mix there's a truly exceptional hybrid. Northern grit determination and tenacity blended with Celtic dyed-in-the-wool erm, Celtichness.

The same goes for M&S, Messrs. Marks and Spencer need a change of 'pitch' from Frank Spencer towards Stephen Marks. But, in the same way TESCO will never be 'sexy' (and deliberately so), M&S can never say FCUK IT! However you can show some cultural nous. The dash of George (Best), is as essential in retailing as a dash of Worcestershire Sauce or Tabasco in a Bloody Mary. The other vital ingredient is clear... absolute transparency of purpose. The Bloody Mary is like a great brand, the bulk of what you see isn't what makes it what it is...

The Magistry can adjust brand cadence to talk to the people 'on the terraces' or address those in the director's box. The main thing about retail 'pitch' is that it isn't simply a case of having a great venue.





## Where are we?

**R**etail design, no matter how innovative or visionary, cannot work as a solo act. It is not "high art" and must constantly balance, compromise and strive to match commercial realities with customer expectations.

Good design works on two levels: firstly, in creating an atmosphere - the identity and ambience for the customer which, in complementing the merchandise offer instinctively tells the customer they are in the right place.

Secondly, there are the practical problems...solving better planning, better space productivity, innovative presentation methods, better merchandising and better customer flow. But perhaps the most important element is the orientation and navigation aids...both intuitive and physical.

With the exceptions of M&S foods and Per Una, the presentation zones at M&S lack any clear differentiation or definition. Like it or not, M&S has become a department store, but a department store without the defined segments, visual punctuation, focal points or 'decompression' space that define and refine discrete spaces in Department Stores per se - cue Per Una.

But largely M&S lacks most of the visual clues that help customers to navigate around the store.

If customers are concentrating on finding their way around, they are missing the merchandise and M&S are missing sales.

Add to this the fact that all of the departments speak in the same tone of voice, regardless of the intended audience, and the situation is compounded. This is not the case for Per Una, nor will be for the forthcoming Limited Collection, but they are retail 'capsules' within the host store. In most other areas, M&S expect customers to complete the jigsaw themselves, but without giving them all of the jigsaw pieces (and no-one has any idea what the picture is on the box).

For each of the notable exceptions there are a myriad of lost opportunities. At M&S scale, with M&S influence and buying power, it is possible to create a shop system which is flexible enough to appear bespoke in each and every scenario, yet have an overall familiarity in terms of proportion and accessibility, so that the customer always knows exactly where they are: M&S.

So, M&S needs to define the space, segmentation and speak in a way that relates to specific customer groups and in their own language. Eventually, M&S won't and can't suit everyone, but everyone will be able to find something; even if, surprisingly & delightfully, it isn't what they were looking for originally...



## Contrabrand™: Keeping it real

There's something much worse than selling knock-offs. That's being fake and not admitting it.

As The Streets might 'av it: 'You're fake, you're fake, and you don't know it...''

Step inside M&S and look around. The faces are all blank. The staff look like they're stacking chairs in the village hall after the explorer has left; the shoppers look like people who couldn't find their way home (even if you gave them GPS).

M&S used to mix things up. M&S was Chicken Tikka Massala, it wasn't an authentic Indian dish but it wasn't fake. It was an eclectic mix of ingredients gathered from various sources and then presented to meet British sensibilities. It was like a Jamie Oliver meal, the best ingredients at reasonable prices, cooked unpretentious and served simply. There was a process of care, consideration and respect; and respect is a two-way street.

If you want people to believe in you, you have to believe in them.

M&S is a real brand, in danger of becoming make-believe; your problem is that someone snapped their fingers and St. Michael woke-up to find that his halo had slipped and he had some imported underwear wound around his ankles...

*"What's the point of buying a 'fake brand', when you can buy the real thing at an outlet centre?"*

Male, 27 years of age.

M&S have squandered their position of trust. People just don't believe in you. Brands are recognisable badges of quality, as away of gaining trust, credibility and self-esteem. They are reassurance that you've 'bought the right thing'. The less money that you have, the more important brands become to you. You want to spend your limited income wisely, ...

M&S is a brand, and as much as it contributes to the bottom-line, 'Blue Harbour' isn't.

Blue Harbour like so many of M&S's *brands* is a simple pastiche of the real thing. A watered down version of something that already exists. Something with its own credibility, authenticity and personality. Blue Harbours's a fake label. It's patronising, and your customers are wiser than that. No one wants a fake. No one wants to feel cheated or look stupid.

M&S has always been a trusted brand and yet these fake brands begin to erode the 'authenticity' of the M&S offer. Per Una, ironically, has become a real brand. It has its own personality, ethos, values, point of view, dedicated team (and every team member understands the joke) and genuinely different merchandise.

In other words, it rings true, it's real, and it's genuine.

M&S needs real brands (or real names "written large") as Mr. Kipling's hottest cakes, against a backdrop of good, solid, functional M&S branded products.

Please keep it real, and in keeping it real... please people.



## A Limited range of choice

**B**usiness is starting to realise that most of our education has trained us to work on convergent questions...ones to which there is a right answer and it is your job to find it. But in business today, 99% of issues are not convergent issues, but divergent issues, to which there isn't a right answer, even if you have all of the facts available to you. They are issues where you don't ask, 'What is the right answer?' but 'What are the shrewd questions?'

At The Magistry, we believe that clients need a more flexible approach, than most traditional agencies offer, one that adapts to the challenges and complex needs that clients face. Ours is a fresher, more vital and competitive approach than others. We believe that good work is built on mutual trust, respect and an element of risk-taking. And our current clients are already enjoying measurable success. You've got one really hard choice and an easy one.

The hard choice is the same one Daimler have already made (albeit almost too late) after 'merging' with Chrysler. Chrysler were trying to sell motors to an immature market, making flash wannabe motors when they had a steadfast diehard market upon who they seemed to be turning their backs. As is often the case the management had to pay for the privilege of being told the 'bleedin' obvious'. But that's because the world is a big confusing busy place and we're all time-poor to the point of overdraft.

"If you haven't got it together and got what I want I'm off

elsewhere" - and how will you ever convince me to return when everyone else is winking and flashing signals at me through myriad media channels?

So, Decision 1: chase a new market or consolidate old? Per Una gives you a glimpse of an opportunity. Not just the core take-up - but the fact that 24-35 appeals beyond an arbitrary age bracket - when the 'Trinnys & Sussanahs' are slipping into some more stylish too. Per Una isn't just a clothing category it's an attitude.

Decision 2: do you appoint one of the old school agencies, in the 'No-one ever got fired for hiring IBM frame of mind'? Bearing in mind that no dinosaur survived by begetting a dinosaur..... or do you appoint The Magistry?

Here Business + Creative are much greater than the sum of their parts. There are people who can rock your world, but there are steady hands here too. When Archimedes said 'Give me a lever and a place to stand and I will move the world' he didn't want to put the Earth out of orbit and plunge us into the sun... he simply wanted to show people how great it is to embrace the new; change is exciting.

We appreciate that you're going to have to make a lot of tough choices, wouldn't it be nice to start one process with an easy one; from a short-list of one?

Welcome to The Magistry.



## M\*Sh - Cele-BRIT-y chefs etc....

Remember when Celebrity Squares was where all the C and D-cup (sorry C and D-list celebrities) went after their 15 minutes of fame? Now I've got a soft spot for celebrities lower down the food chain, it's just outside a town in Essex - it's called Jodie Marsh. Soft spot, marsh - geddit?

Celebrity endorsement is one of the great phenomenons of our time - and yet they can really grate. And I don't mean 'can really grate' as in Jamie Oliver's demonstrations for Sainsbury's - I mean 'they really get on your 36 double D's!'

If M&S Food was to recruit their own Jamie, Gordon, Christophe, Gary, or opt for the double-barrelled double-chinned Worrell-Thompson it would look terribly me-too. So, perhaps M&S grub should really speak for itself?

However, for a quick boost, you can't beat rubbing shoulders with the right type of people.

In the 1990s when RAVEL were languishing we turned to ELLE and GQ to see if we could hang on their shirttails. 'Be gone! You scruffy oiks...' they cried - but Marie Claire and FHM decided to play ball. The trade-off was exposure for the magazines across nearly 100 prominent high street stores, and RAVEL gained that *j'n'est said quoi* synonymous with fashion. This exercise also served to provide the change of emphasis and breathing space to allow us to implement a boutique style store blueprint (something we designer-types had up our supposedly fluffy sleeves...). But then, isn't anyone and everyone a designer? It's strangely subjective.

If you gave the average person the ingredients for a gourmet meal AND all the facilities and invited them to do a 'Ramsay' would they confidently steam in and cook up a storm? Unlikely. And yet, when it comes to the retail brand comprising so many ingredients, everyone has an idea - especially when it's a national institution (in fact working for M&S might be a short cut to an institution!)

The complex mix of environment, imagery, equipment, furniture, finishes and spacial relationships is often challenging enough at small scale. With M&S it's writ large. Some people appreciate and 'do' great vistas and store navigation, others seem determined that people should fend for themselves... as you've seen, here at The Magistry we're happy to disclose insights into our process, our very M.O. if you will. We do so confident that it's not just enough to follow the letter of the law, or the letter of the logo, you have to be suffused with the spirit of brand - it's very soul.

So we'll happily lay out the strategic ingredients, and others may step in and make a meal of things - but we're quietly confident that they won't cook-up a really tasty bravura brand.

As with most things, it's what you leave out that counts as much as the effort you put in...



# Punchlines versus deadlines

In creative circles there is an industry joke, or rather creativity is an industry joke. The poor status of creative agencies is entirely due to these communications businesses failing to communicate their value; so, when the going gets tough, it's marketing and design that are stripped from suffering corporate budgets.

In business consultancy there is an industry joke that the business consultant as someone who takes your watch, tells you the time, and then returns the work with a fee note. There is also a tendency towards dry, desiccated 80-page documents with no punchline.

But The Magistry isn't a joke... it offers true synergy and a team of people dedicated to progress rather than process. We're a tough-minded resource weaving the two inseparable strands of business and creativity into a tough flexible framework for improved commercial performance and success: Phew!

We don't just make observations, we provide you with opinions and place them in the context of an opportunity. This isn't about brand differentiation per se, this is about day-to-day delivery of service levels and assistance that actually make your job easier and more enjoyable. All of us have KPIs intrinsic to our working lives (some lucky devils just don't need to understand what they are;-) but there are things that we can offer you which are just all part of The Magistry's aim of making you look good.

Our observation and responses drive direction, and are catalysts for change, and as Evelyn Waugh wrote, '...change. It's the only evidence of life.'

The author is your first point of contact for any further requests or instructions.

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