



ACCOUNT PLANNING // SYLLABUS & SCHEDULE UNC JOMC 491.5 // SPRING 2015

1) WHY THIS COURSE

We are now living and working in the *conceptual age*¹. This is an era that places a high value on:

- Approaching problems from unexpected angles (*creativity*)
- Putting yourself in other people's shoes (*empathy*)
- The ability to work well with others (*collaboration*)
- Telling a compelling story, verbally and in writing (*persuasive communications*)

This effect is amplified in the marketing and communications industries. It's no longer just about creating an amazing TV ad to go on air during the Super Bowl, or a full-page print ad in *USA TODAY*.

Today's great communications ideas still include these classic methods, but the future lies in creating ideas that live where they can best thrive – from Facebook and Instagram, to gaming, new product development, and so much more.

This course will prepare you for this new age of work by exercising your creative, writing and presentation muscles, to help you see opportunities in new ways, design inspiring strategies, and work effectively with new team structures in the future workplace.

There has never been a better time to get into this field and to make the world a better place through your work.

2) COURSE LOGISTICS / CONTACT INFORMATION

INSTRUCTOR	Josh Carlton
WHERE	Carroll 340A
WHEN	Wednesdays 5.45p – 8.15p
INSTRUCTOR EMAIL	joshcarlton@unc.edu
COURSE TWITTER	@UNCPlanners and/or #UNCPlanners2015
OFFICE HOURS	Wednesdays (all except 3/11) from 4p-5.15p at Caribou Coffee (110 W. Franklin Street — near Columbia St.), or by appointment

¹ Alan Greenspan, former chairman of the Federal Reserve Board; Daniel Pink, author; Tom Kelley, founder of IDEO.

3) OVERALL COURSE STRUCTURE

This course has three key modules:

1. **Insights:** Discerning the difference between a fact vs. an insight, understanding of the uses of research in the pursuit of insights, and how to infuse creativity in normally typical research methods.
2. **Creativity:** Inspiring and sparking creativity, starting from what it means to be creative, to writing effective briefs, and working with creative teams. Creativity can't really be *taught* in the classic sense, so we will have many hands-on exercises.
3. **Persuasion:** Persuading others by telling stories well that present your ideas effectively in writing and in presentation form.

4) INTENDED AUDIENCE / WHO SHOULD TAKE THIS COURSE?

Students interested in what powers great communications ideas, creativity, and strategy. As you've learned in many other classes in the School of Journalism and Mass Communication, the definition of brand communications has dramatically changed over the last decade. Now, in the world of Kickstarter, transmedia storytelling, always-on connectivity and on-demand content, effective strategies are a must-have – not a nice-to-have. The skills learned in this course will be beneficial in most communications or marketing job functions at organizations of any size, even without the specific job title of strategist or planner.

5) OBJECTIVES FOR THIS COURSE / WHAT YOU WILL LEARN

You will learn the skills of a strategist/planner, which include learning how to:

- ➔ Think critically and analytically
- ➔ Write effectively and creatively
- ➔ Connect what a brand offers to what an audience wants
- ➔ Persuade others to see what you see
- ➔ Collaborate with others
- ➔ Spark creativity (within yourself, and among other people)
- ➔ Inspire those around you by telling stories well

6) A VISUAL GUIDE TO THIS COURSE

We will begin with a foundational understanding of account planning, and will then move into the sub-disciplines of research & insights (module 1), creativity (module 2) and persuasive communications (module 3).



7) EXPECTATIONS / WHAT I ASK OF YOU

1. **Attend.** We meet one night a week, making attendance mandatory.
2. **Participate.** The success of this course is dependent on you playing an active role.
3. **Present.** Sharing your ideas with others by presenting them well can set you apart from your colleagues in the real world. We will have plenty of practice with presentations (which doesn't always mean a slide deck).
4. **Write.** Learning how to write clearly and succinctly is a key skill in whatever job you pursue.
5. **Be willing to be imperfect.** Creativity is about pushing boundaries, which often times means it's not perfect. Please come to each class with an open mind, be willing to put yourself out there, and not judge others.

8) DOES THIS COURSE = A PLANNING JOB?

No single course can guarantee you a job in planning. However, this course will provide you with an understanding of how to think strategically about communications, knowledge that will serve you well in whatever you pursue post-graduation. You might even get a case or two to talk about in interviews.

9) REQUIRED BOOKS

There are 3 required books in this course, at a total cost of \$52, at most:

1. *The Practical Pocket Guide to Account Planning* by Chris Kocek (\$10 e-book, \$18 paperback)
2. *The Creative Habit* by Twyla Tharp and Mark Reiter (\$9 e-book, \$10 paperback)
3. *Presentation Zen: Simple Ideas on Presentation Design and Delivery* by Garr Reynolds (\$10 e-book, \$23 paperback - highly recommended)

A strategist must apply the knowledge gained in reading – read the text with an eye to how the concepts can be applied in this course.

10) REQUIRED ARTICLES

Required articles are listed in the detailed course schedule. Any other required articles will be distributed via email and marked accordingly. These will include both “classics” and applicable news articles from magazines or bloggers.

A strategist must apply the knowledge gained in reading – read the articles with an eye to how the concepts can be applied in this course.

11) LECTURE HANDOUTS

Handouts from course sessions will be posted online, within 48 hours of our session. Print outs will not be provided.

12) STAYING CURRENT

Great strategists are voracious readers, and are able to make connections between disparate sources of information. You never know where a creative spark could come from.

You must know what is happening in the marketplace, real-time. Students are strongly encouraged to follow industry leaders on twitter, and to subscribe to blogs and key news/inspiration sources via RSS readers (most decent apps are \$1 or \$2).

Here is a starter list. Look at these sites and where they link to customize your feeds:

<p>The Web kottke.org wired.com/blogs readwriteweb.com avc.com zephoria.org/thoughts</p>	<p>Digital/Social/Mobile mashable.com insidefacebook.com digitalbuzzblog.com venturebeat.com @contagious</p>	<p>Idea Companies bbh-labs.com madebymany.com/blog blog.wk.com kickstarter.com/blog teehanlax.com/blog undercurrent.com</p>	<p>Industry News adage.com fastcompany.com adverblog.com adfreak.com @fastcocreate @fastcodesign</p>
<p>Creative & Design thefwa.com creativity-online.com designobserver.com coudal.com swiss-miss.com</p>	<p>Culture psfk.com monocle.com brainpickings.org springwise.com coolhunting.com</p>	<p>Planners/Strategists @uberblond whatconsumesme.com neilperkin.typepad.com tomfishburne.com markpollard.net</p>	<p>Conferences & Authors poptech.org danpink.com sethgodin.typepad.com 99u.com ted.com</p>

We will be discussing articles from these sources, impromptu, throughout the semester.

13) ASSIGNMENTS

There will be no mid-term exam and no final exam in this course. You will learn by doing – actively participating, creating and thinking.

All assignments are due at the beginning of class on the date shown in the assignment description/grid, unless otherwise noted.

Assignments are designed to equip you with the skills to work on real-world problems.

14) LATE ASSIGNMENTS POLICY

All assignments are due at the beginning of class on the day they are listed as due, with the exception of the blog entries, which are due by Monday of that week’s class at 6p. No late blog entries, papers or presentations will be accepted. Assignments are discussed in class on the day they are due.

Please make arrangements with me – via email – at least 24 hours ahead of time to submit an assignment if you know of a conflict.

15) WEEKLY INDEX CARD SUMMARIES

Thinking on the fly is a vital skill to anyone in the workforce today. As part of our class, you will write a short summary at the end of every class on a 3"x5" index card, to include (at minimum):

- ➔ Your name
- ➔ In 1-2 sentences, what conclusion did you arrive at, based on our discussion today?
- ➔ What do you still want to know?

16) WRITTEN ASSIGNMENTS SPECS

For written assignments (non-blog), please print them out, staple and include the word count at the top of your first page (this doesn't count towards your words).

Please write your name on the back of the final page (NOT on the front).

17) GROUP PROJECTS & PRESENTATIONS

Group work is designed to bring the elements of the course together, and to encourage collaboration with others.

For group assignments, each group must consist of 4 students MAX, and you are expected to stay in that group for the duration of the semester.

A portion of your grade will consist of your overall contribution to the team, assessed via peer evaluation forms. Peer evaluations are confidential, and will be used solely to determine group participation.

We will have in-class work sessions throughout the semester during which you will be able to share work-in-progress thinking with the instructor. Please come prepared to these sessions to get the most out of them.

Presentations will be timed. No note cards.

18) CLASS PARTICIPATION

Class participation is a subjective endeavor. It is still a necessary one. Criteria include the following, for lectures, guest speakers, and exercises:

- a. Is the student prepared, when called on, to share his/her blog post/idea from this week?
- b. Do comments add to our understanding of the topic?
- c. Is the student a good listener? Is he/she paying attention, looking at the person speaking (and not a screen or mobile phone)?
- d. Do comments/questions show evidence of not just reading, but analyzing and thinking about, the book chapter or article?
- e. Are points made relevant to the discussion?
- f. Are statements presented in a concise, compelling manner?
- g. Does the student participate during in-class exercises?

As you prepare for class through the readings, I suggest you make notes in the margins, highlight interesting sections, and write a few relevant questions or comments.

This class relies on your active participation. It is about an attitude of wanting to learn and grow – it’s not about taking up time during the class with a monologue.

19) GRADING POLICY

There will be many grades given in this class. Your final grade is calculated as a summary of all the components below:

	Assignment	Value
<u>INDIVIDUAL</u> 500 PTS	Blog	100
	Participation (incl. class discussion, labs, and index cards)	200
	Creative Interviews Paper	200
<u>GROUP</u> 500 PTS	Street Crossing Presentation	125
	POV Presentation	175
	Creative Brief & Briefing Presentation	200
	TOTAL	1000

Grades will be assessed on the following:

- A: Outstanding level of thought, effort and attention to details.
- B: Good level of thought, effort and attention to details.
- C: Assignment is complete. Thought, effort and attention to details about par.
- D: Assignment is incomplete and/or lacking effort.
- Below: Assignment is non-existent or severely lacking effort.

Please contact me outside of class (during office hours or via appointment) to discuss particular grades on assignments. These conversations work best in-person, and I will under no circumstances discuss grades via phone or email. Please wait at least 3 days after receiving a grade before reaching out to me, to allow for time to process the grade in a rational manner.

20) ATTENDANCE

- a. Attendance is expected at every class session, since each session builds on the prior discussion.
- b. Please arrive on time so we may start at the scheduled start time.
- c. You may miss one class with permission of the instructor – explained.
- d. If you must be absent once, please notify the instructor in advance, so your absence is not unexplained.

- e. Unexplained absences will result in a forfeit of Class Participation for that day.
- f. Three or more absences will result in a 50% deduction on all assignments.
- g. Please arrive on time and do not leave early. Excessive tardiness or packing up early will result in a lower participation grade. Make arrangements with me in advance if you must do so.

21) SEATING

Please choose a seat you like, and sit in the same spot throughout the semester. Name tents will be helpful in the first few weeks.

22) HONOR CODE

The University of North Carolina at Chapel Hill has had a student-administered honor system and judicial system for over 100 years. The system is the responsibility of students and is regulated and governed by them, but faculty share the responsibility. If you have questions about your responsibility under the honor code, please bring them to your instructor or consult with the office of the Dean of Students or the Instrument of Student Judicial Governance. This document, adopted by the Chancellor, the Faculty Council, and the Student Congress, contains all policies and procedures pertaining to the student honor system. Your full participation and observance of the honor code is expected.

Sanctions for Academic Misconduct: The "usual" sanction for instances of academic dishonesty is an "F" in the course (or assignment) and suspension for one full academic semester. Please note that for international students, this may result in the loss of your student visa status, requiring you to leave the USA until your suspension is over.

For your information, several important provisions of the Honor Code are highlighted: Academic Dishonesty. It shall be the responsibility of EVERY student enrolled at the University of North Carolina to support the principles of academic integrity and to refrain from all forms of academic dishonesty, including but not limited to, the following:

1. Plagiarism in the form of deliberate or reckless representation of another's words, thoughts or ideas as one's own without attribution in connection with submission of academic work, whether graded or otherwise.
2. Falsification, fabrication or misrepresentation of data, other information, or citations in connection with an academic assignment whether graded or otherwise.
3. Unauthorized assistance or unauthorized collaboration in connection with academic work, whether or not for a grade.
4. Cheating on examinations or other academic assignments, whether graded or otherwise, including but not limited to the following:
 - a. Using unauthorized materials and methods
 - b. Violating or subverting requirements governing administration of examinations or other electronic assignments.
 - c. Compromising the security of examinations or academic assignments.
 - d. Representing another's work as one's own; or,
 - e. Engaging in other actions that compromise the integrity of the grading or evaluation process.
 - f. Assisting or aiding another to engage in acts of academic dishonesty is prohibited.

If you have questions about the honor code at UNC, I encourage you to contact the Office of the Dean of Students at 919.966.4042. You are encouraged to ask questions regarding your responsibility under the Honor Code. To eliminate any possible confusion, the Instructor expects you to do your own work on individual assignments. Failure to adhere to the honor code will result in immediate due process.

23) ACEJMC ACCREDITATION — PROFESSIONAL VALUES & COMPETENCIES

The School of Journalism and Mass Communication's accrediting body outlines a number of values you should be aware of and competencies you should be able to demonstrate by the time you graduate from our program. Learn more about them [here](#).

No single course could possibly give you all of these values and competencies; but collectively, our classes are designed to build your abilities in each of these areas. In this course, we will address a number of the values and competencies, with special emphasis on the selected values & competencies below:

- Understand concepts and apply theories in the use and presentation of images and information
- Think critically, creatively and independently
- Conduct research and evaluate information by methods appropriate to the communications professions in which they work
- Write correctly and clearly in forms and styles appropriate for the communications professions, audiences and purposes they serve
- Apply tools and technologies appropriate for the communications professions in which they work
- Demonstrate an understanding of the history and role of professionals and institutions in shaping communications
- Demonstrate an understanding of the diversity of peoples and cultures and of the significance and impact of mass communications in a global society

24) WHAT YOU READ IN THE COURSE REGISTRATION BOOK

A study of the principles and tools of account planning, all in the pursuit of connecting people with brands in new and interesting ways. This course focuses on how to uncover customer, competition and brand insights through quantitative and qualitative research, including online surveys, social media analysis, focus groups and one-on-one interviews. Students learn how to persuade, provoke and inspire others through creative briefs, presentations and more.

25) INSTRUCTOR AVAILABILITY

If you can't stop by during office hours (see section 2), send an email to the Instructor with 2-3 proposed times.

26) SCHEDULE CHANGES

The Instructor reserves the right to make changes to the syllabus, including project due dates and topics, when unforeseen circumstances occur. These changes will be announced as early as possible so students will be able to adjust their schedules.

27) DETAILED COURSE SCHEDULE

CLASS	DATE	TOPIC	PRE-WORK	ASSIGNMENTS
MODULE 1: INSIGHTS				
1	1/7	<p>Introduction to Strategy & Planning</p> <p>> An introduction to the course and what we will cover this semester, plus an exercise in creativity to get us started.</p>		
2	1/14	<p>Planning Basics</p> <p>> Discussion of the big idea, insights and the impact of digital communication.</p>	<p><u>Read:</u> Text: <i>The Practical Pocket Guide to Account Planning</i>, Parts I (“Orientation”) & II (“How An Ad Gets Made...”) Article (your choice of at least one of these): Jay Chiat Awards: <i>Adoption</i>, <i>Right-Hand Diamond Ring</i>, or <i>TLC Case Study</i> (available on Sakai).</p>	<p>Blog Post 1: Analyze Communications</p>
3	1/21	<p>The Tools & Tricks</p> <p>> A deep dive into the language, tools and daily requirements of planners and strategists</p> <p>> Knowing the difference between facts and insights</p>	<p><u>Read:</u> Text: <i>The Practical Pocket Guide to Account Planning</i>, Parts III (“Organized Chaos...”) & IV (“Tricks of the Trade”) Article (your choice of at least one of these): Pick any of the PDFs on the Jay Chiat Awards 2014 page</p>	<p>Blog Post 2: Facts vs. Insights</p>
4	1/28	<p>Why We Must Be Creative in the Pursuit of Insights</p> <p>> Asking the right questions, in the right ways.</p> <p>> Why identifying the right problem is key in providing a constraint to creativity.</p>	<p><u>Read:</u> Text: <i>The Creative Habit</i>, Chapter 5 “Before You Can Think out of the Box, You Have to Start with a Box” & Chapter 6 “Scratching” Article: Why is a Good Insight Like a Refrigerator? by Jeremy Bullmore</p>	<p>Blog Post 3: Good Questions</p>
5	2/4	<p>Challenger Brands: The Impact of Constraints on Creativity</p> <p>> The importance of tapping into culture to move brands and markets, especially when working with a small budget.</p>		<p>Street Crossing Presentation</p>

CLASS	DATE	TOPIC	PRE-WORK	ASSIGNMENTS
<u>MODULE 2: CREATIVITY</u>				
6	2/11	<p>Creativity Builders & Killers</p> <p>> How to work to spark creativity, and how you might kill it with the wrong comment, email or document.</p>	<p><u>Read:</u> Text: <i>The Creative Habit</i>, Chapter 1 "I Walk into a White Room" & Chapter 2 "Rituals of Preparation" Article: How to Be Creative (PDF) by Hugh MacLeod</p> <p><u>Watch:</u> TED Talk: Elizabeth Gilbert "Your elusive creative genius"</p>	<p>Blog Post 4: Your Creative Process</p>
7	2/18	<p>The Creative Brief & Briefing</p> <p>> Review of the sections on a creative brief, review of many different types of briefs from various agencies. > Discussion on the role of the briefing.</p>	<p><u>Read:</u> Text: <i>The Creative Habit</i>, & Chapter 7 "Accidents Will Happen" & Chapter 8 "Spine"</p> <p><u>Watch:</u> TED Talk: David Kelly, "How to build your creative confidence"</p>	<p>Blog Post 5: Creative Briefs</p>
8	2/25	<p>Working Through the Creative Process</p> <p>> Working with creative teams and clients through the ideas/creation process</p>	<p><u>Read:</u> Text: <i>The Creative Habit</i>, Chapter 9 "Skill" & Chapter 10 "Ruts & Grooves"</p>	
9	3/4	IN-CLASS LAB	TBD	<p>Creative Interviews Paper</p>
—	3/11	<i>Spring Break</i>		

CLASS	DATE	TOPIC	PRE-WORK	ASSIGNMENTS
<u>MODULE 3: PERSUASION</u>				
10	3/18	<p>The Importance of Preparation</p> <p>> Why it's so important to prepare, how to prepare, and why this skill is vital for planners and strategists.</p>	<p><u>Read:</u> Text: Presentation Zen, Chapter 1 "Presenting in Today's World," Chapter 2 "Creativity, Limitations and Constraints" & Chapter 3 "Planning Analog"</p> <p><u>Watch:</u> PSFK "Skills Of The Rockstar Planner: Communicating Ideas"</p>	<p>Blog Post 6: Analyze Experiences</p>
11	3/25	<p>Craft Matters</p> <p>> Why it's not just about what you say, but how you say it.</p>	<p><u>Read:</u> Text: Presentation Zen, Chapter 4 "Crafting the Story," Chapter 5 "Simplicity: Why it Matters," & Chapter 6 "Presentation Design: Principles & Techniques"</p> <p><u>Watch:</u> PSFK Conference – Rob Walker "Significant Objects"</p>	
12	4/1	<p>Guest: NSAC Dress Rehearsal</p> <p>How to Connect</p> <p>> Empathizing with an audience.</p>	<p><u>Read:</u> Text: Presentation Zen, Chapter 7 "Sample Slides", Chapter 8 "The Art of Being Completely Present" & Chapter 9 "Connecting With an Audience"</p> <p><u>Watch:</u> TED Talk: John Bohannon "Dance vs. powerpoint, a modest proposal"</p>	<p>Blog Post 7: Learning from Documentaries</p>
13	4/8	<p>Persuasive Communications Summary</p> <p>> A wrap-up look at presenting, persuading, and filling in any final gaps.</p>		<p>POV Presentation</p>
14	4/15	IN-CLASS LAB	TBD	

CLASS	DATE	TOPIC	PRE-WORK	ASSIGNMENTS
15	4/22	The Importance of Failing > Risk-taking in the right ways and how it can lead to a successful career.	Read: Text: <i>The Creative Habit</i> , Chapter 11 "An 'A' in Failure" Text: <i>Presentation Zen</i> , Chapter 10 "The Journey Begins"	
—	4/30 @ 7p	Final		Creative Brief & Briefing Presentations

28) INDIVIDUAL & GROUP ASSIGNMENT DETAILS

ASSIGNMENT 1: BLOG (Individual)

The ability to express your ideas clearly and succinctly is a must in the conceptual age. As part of our class, you will maintain a blog and post at least seven (7) posts over the course of the semester, with links and embedded content to communicate effectively. A substantial post should be about 300-400 words.

Blog posts will be graded as follows:

- ➔ On the due date of a post, summarize your entry in a succinct email subject line. This does not necessarily have to be the same sentence as the title of your blog post.
- ➔ Send an email to the Instructor by 4.45p that Wednesday (an hour before class time) with your subject line & put the link to your post (a direct link to that specific post) in the body of your email
- ➔ A simple scale will be used:
 - ➔ Check-plus (3) — Outstanding level of critical thinking, reasoning and clarity in the post and summary. Pulls in outside sources. Refers to content from class discussions & readings.
 - ➔ Check (2) — Relevant post and summary response. Refers to content from class discussions & readings.
 - ➔ Check-minus (1) — Post is complete, and shows minimal effort.
 - ➔ Zero (0) — Post is not complete.
- ➔ Unless you hear otherwise from the Instructor, assume that you are doing well (i.e., check-plus) with your effort on the blog posts.

Format:

There are several free blogging platforms out there. The best are: WordPress, Blogger, Tumblr, or WIX.

If you're setting a blog up for the first time, try and use your real name instead of a pseudonym or what your Skype name might have been (if you had/have one of those). This blog might be your first time making a name for yourself on the web so it helps to have it attached to your real name.

How to be successful with a blog post:

Read through several of the blogs listed in the course syllabus (*section 12: Staying Current*). Take a look at how they write, embed content, and tell stories. These are the best of the best. Learn from them.

What I will be looking for:

- ➔ Quality of writing and thinking.
 - ➔ Is the argument presented clearly?
 - ➔ Is the content of the post carefully summarized in a thought-provoking summary statement (email subject line)?
- ➔ Quality of presentation.
 - ➔ Make it a multimedia experience — take advantage of the medium of the web!
 - ➔ Add [hyperlinks](#) when you reference other articles.
 - ➔ Add embedded content (youtube/vimeo videos) when it helps you tell your story.
 - ➔ Add images (just make sure you reference who they came from)... read [this post](#) carefully for guidelines on using images in your blog posts.

BLOG POST 1: ANALYZE COMMUNICATIONS (due 1/14)

Think of a piece of brand communication (remember this can be any experience something may have with a brand — an ad, website, app, anything) that resonates with you. This could be an app, an experience, a website, a TV ad, whatever you'd like. Analyze that piece of communication as an advertising and communications professional would.

Consider the following:

- What do you think is the insight behind that communication?
- Why does it resonate with you (go beyond just the fact that "it's funny and I'm funny"... although that's a place to start)?
- What do you think the brand's planning team learned about in their research?
- Do you think there are people out there who this communication is not for? What do you think they are like? ...and anything else you'd like to write about.

BLOG POST 2: FACTS VS. INSIGHTS (due 1/21)

What do you think the difference is between a fact and an insight?

Provide examples that support your point-of-view.

BLOG POST 3: GOOD QUESTIONS (due 1/28)

Good research questions prompt people to tell stories, and not just answer questions. Practice changing the below close-ended questions into open-ended questions so that your respondents will tell stories in a research interview setting. Create at least two other ways of asking each question below.

- Have you ever sent a text message while driving?
- Would you say you travel abroad frequently?
- Do you post a lot of pictures on Instagram?
- Do you prefer to shop at big boxes or locally owned stores?
- Do you have an iPhone or an Android phone?
- How often do you eat sweets?
- Do you tend to buy things that are on sale?

Answer this to close your blog post: why is it important to ask the right questions?

BLOG POST 4: YOUR CREATIVE PROCESS (due 2/11)

Twyla Tharp talks about what it's like to walk into an empty room and create in Chapter 1 of *The Creative Habit*. Elizabeth Gilbert talks about her creative process, and all the ups and downs, in her TED talk.

How does your personal creative process work? A few questions to consider, and please don't let these constrain your writing: how does the blank page with blinking cursor make you feel, before you start a paper? where do you look to for "scratching" your creativity (see Ch. 6 of *The Creative Habit*)? when/where are you most creative?

BLOG POST 5: CREATIVE BRIEFS (due 2/18)

We'll soon be discussing creative briefs and briefings in detail. For this blog post, find a creative brief online that you like – there are many out there you can find via web search, or email me if you are having trouble finding something useful, and I will send you a few to look at. The creative brief could be from any agency, digital or full service.

Write a post that links to that brief and analyze the sections on the brief. What do you think is powerful about that brief's format? What would you change?

BLOG POST 6: ANALYZE EXPERIENCES (due 3/18)

Awareness of your own interactions with a product or service is a necessary skill to master in order to understand how a client's customers feel about their brand. With this assignment, you will learn how to pay very close attention to your own thoughts, feelings, and behaviors as you buy and experience a product/service.

Once you select the purchase you're going to focus on, you must notice every aspect of the purchase and use process, even if the whole thing takes only a few minutes. This is NOT meant to be a rant about a poor service or product experience.

Ask yourself:

- What are my expectations? What is the source of those expectations?
- What do I notice about the store I'm purchasing the product in? If I'm purchasing online, what is the website trying to say to me?
- What do I notice about the packaging and the product itself?
- What about using the product? What am I thinking and how do I feel as I use the product?

Next, distill your observations into a key consumer insight. At the base of everything you've noticed, what is the key to understanding this experience?

Finally, given this insight, try your hand at making a recommendation for marketing of this product/service. How would you improve the 4P's (product, the pricing, the distribution or the promotion) to make it more consistent with your insight?

BLOG POST 7: LEARNING FROM DOCUMENTARIES (due 4/1)

In *Presentation Zen*, Garr Reynolds writes about learning from the best, and going well beyond books on the topic of presenting well. Here's what Garr says about documentaries: "documentary films, for example, are a medium that tells a non-fiction story incorporating narration, interviews, audio, powerful video and still images, and at times, on-screen text. These are elements that can be incorporated into a live oral presentation as well." (p. 22).

This assignment is all about that. Find a documentary that you haven't seen yet (on YouTube, hulu, netflix, amazon, etc.) and watch it. The film can be completely unrelated to presenting, communications industry, etc. A few of my favorites, if you need any ideas: *Riding Giants*, *Sketches of*

Frank Gehry, Helvetica, Art & Copy, plus there are thousands of other options, many available for free online.

Watch with a critical eye and answer the following questions in a blog post, and provide any additional thoughts that are sparked by these:

- What were the major elements of story used in the documentary?
- How does the filmmaker draw you into the story? I mean, really draw you in? (was it music? a specific quote?)
- What idea(s) do you have to incorporate into your next presentation, after watching this film?

ASSIGNMENT 2: STREET CROSSING PRESENTATION (Group) — due: 2/4

With your group from class, select an intersection somewhere in the area, and observe how people cross the streets. Street crossing can be a risky behavior, so we will connect these insights to a campaign to stop another risky behavior – binge drinking among college students.

More details:

Segmentations are a big deal to agencies and clients today, and for good reason. They offer a more precise way to connect with audiences. New products can be developed for specific segments, and so on. You must understand the attitudes, values, and behaviors of various segments in order to really comprehend what makes them all different.

For this first team assignment, your team will observe the way in which people cross streets. It would not be surprising if your team found that the way in which people perform this task does vary. Based upon direct observation only, your task is to organize the data into a coherent model that segments the audience based upon the way in which they perceive the task of crossing the street and the behaviors they use in accomplishing that task.

Your team may pick any street or streets they wish and the size of the sample or type of observations used to construct your segmentation are entirely up to the team. Your readings and your team's understanding of how advertising works may suggest different points of view on the data you need and how to collect it. Similarly, the method used to present the team's findings is in large part up to the team's discretion. Your team is asked to connect your segmentation (based on your observations) back to a real communications assignment today – getting people to stop a risky behavior – binge drinking.

Please realize that looking for meaning and insight from complex human behavior, like crossing the street, in advertising is sometimes done with limited time and with fewer than desired observations. Our desire as strategic thinkers is to grasp the human insight the behaviors reflects – why do people behave like that? What does it tell us about them? How should we talk to them in the future?

In a short (10 minutes max) presentation, put together your main insights, create as many segments as you think exist, then connect these insights to your campaign to stop binge drinking.

Questions to consider:

- > How does crossing the street provide a window into who these people are?
- > What else could we know about them, based on how they cross the street?
- > How do the segments you've identified compare to each other? How are they similar? Different?
- > What kind of anti-binge drinking message would resonate with them?

Your work will be evaluated on:

- Strategic thinking (are these fresh insights? Are the findings interesting?)
- Quality of presentation (was the presentation of ideas interesting, i.e., not boring? Did it tell a logical story from the data?)
- Peer evaluations

On presentation day, please bring in your peer evaluation form (see the last few pages of this document).

ASSIGNMENT 3: CREATIVE INTERVIEWS PAPER (Individual) — due: 3/4

This assignment is designed to encourage you to think critically in new and different ways. You will gain experience connecting with, interviewing and being around people working in creative industries.

To help you get inside the mind of a creative person, you will interview two people (separately) you believe are creative. You must select at least one person that you've never met before. You might want to get started early making connections with people to ensure you give yourself enough time to find someone else, just in case you need a backup option. To broaden your options, you may interview people on the phone or in-person.

The people you select are entirely up to you – artists, entrepreneurs, professors, authors, photographers, designers, ad agency professionals, etc. – as long as they are involved in creative pursuits on a daily basis.

After conducting your interviews, you will write a paper (1000 words max) that analyzes how the two people you interviewed approach creative pursuits. Look for common threads, differences, how they find inspiration, etc.

Please include your discussion guide (the questions you asked) as an appendix.

ASSIGNMENT 4: POV PRESENTATION (Group) — due: 4/8

We have spent much of the semester talking about the skills of planners and strategists, and how important creativity is in that role within an organization. Being a persuasive communicator is the next skill we are working on over the next several weeks.

Why? Because as a planner/strategist/agency professional, you will be paid for your opinions... and persuading people to see your point of view is a valuable skill.

No matter what field you end up working in post-graduation, getting better at persuasion will serve you well. It's estimated that 350 PowerPoint presentations are given every second around the world. Few of them are any good. It's something that many people do not devote enough time to, but it can make a career.

Presentation design is important, but it's even more important to take the time to really think through your audience and what they want from your presentation. After you have that foundation, then research to find the insights and intelligence you need, and then spend the effort to write/tell a story to bring the ideas to life.

With your group from class, you will pick any one of the top 100 brands in the world (via [Interbrand's Best Global Brands List](#)) and create a persuasive presentation (10 minutes max.) to convince its CMO (Chief Marketing Officer) to spend HALF of their brand's 2015 marketing budget on one of the following trends (pick only one):

- 1) Mobile marketing (apps, mobile search, etc.)
- 2) Social good programs (cause marketing, one-for-one models - TOMS, Warby Parker, etc.)
- 3) Social media programs (any social platforms - existing or emerging)
- 4) Content creation (branded content, original programming - brands as producers, etc.)

To complete this project, you will need to understand, at minimum:

- > What is the mindset of your audience - the CMO?
- > What is the brand's position in the marketplace? What does it stand for?
- > What do you think are the brand's objectives?
- > Who do you think they are trying to reach?
- > Why is this trend relevant to this brand/this audience?
- > How would your proposed marketing activities benefit the brand?
- > Why is this something the brand needs to do now?
- > What are the risks?

This assignment is not:

- > an opportunity to say "I think" or "we think" – bring some confidence to your recommendation
- > a research report

This assignment is:

- > a chance to test out some of the presentation tips we discuss in class
- > an exercise in persuading someone to your point of view

On presentation day, please also bring in your filled-in audience persona and your peer evaluation form.

AUDIENCE PERSONA (1 per team)

Your persona should answer these questions:

What are they like?

Demographics and psychographics are a great start, but connecting with your audience means understanding them on a personal level. Take a walk in their shoes and describe what their life looks like each day.

Why are they here?

What do they think they're going to get out of this presentation? Why did they come to hear you? Are they willing participants or mandatory attendees? This is also a bit of a situation analysis.

What keeps them up at night?

Everyone has a fear, a pain point, a thorn in the side. Let your audience know you empathize—and offer a solution.

How can you solve their problem?

What's in it for the audience? How are you going to make their lives better?

What do you want them to do?

Answer the question "so what?"—and make sure there's clear action for your audience to take.

How can you best reach them?

People vary in how they receive information. This can include the set up of the room to the availability of materials after the presentation. Give the audience what they want, how they want it.

How might they resist?

What will keep them from adopting your message and carrying out your call to action?

SOURCE: see <http://www.duarte.com/book/slideology/> for a downloadable template.

ASSIGNMENT 5: CREATIVE BRIEF & BRIEFING (Group) — due: 4/30

CONGRATULATIONS! The client of that huge global brand (from your POV presentation) bought your pitch! Now it's time to bring that thinking to a creative team and get them kicked off. For this assignment, you must compose a one-page creative brief using the template on the next page, and lead a compelling and inspiring briefing to kick off the project you just sold to your client. (10 minute max. presentation)

The hallmark of good communications is a resonant and clear message directed to an external audience. Less visible, but no less important, is the internal communication that makes such messages possible. Chief among these is the creative brief and briefing: the foundation, the "blueprint," the "battle plan" behind the marketing that is used to brief creatives, media, and other stakeholders on objectives, insights, and their focus points.

The creative brief distills all relevant information you have learned about your assignment into a few key points so that your internal constituencies can do their jobs well. If the troops are ill-briefed, they end up sailing to invade Iceland instead of Normandy (it is generally agreed that this might have impacted the outcome of WWII).

A creative brief must be two things, above all. It must be creative, and it must be brief. It must inspire the creative (media, client, etc.) teams to do great work, and it must be concise yet contain all relevant information. The first requires an ability to look at the problem in a new light; the second the ability to write with brevity (hint: the art of writing is vicious editing and re-writing).

For the briefing presentation, our class is your creative team. Any presentation method is allowed as long as it is clear and compelling. Grab attention and be sure that you are setting clear direction without being ordinary or totally predictable. All the while, don't be different just to be different. Presentation methods and styles must serve a greater purpose.

Things to consider:

- How will you get creative teams energized about the assignment?
- Some things must change between the client presentation and the creative briefing (internal presentation). Remember the goal is not to show how smart you are.
- What will you do to make the briefing simple yet interesting/memorable?

On presentation day, please bring in your creative brief and your peer evaluation form.

CREATIVE BRIEF (one page)

client: _____

team: _____

what are we doing?

Provide some background and context for this project.

why are we doing this?

Summarize the challenge at hand in an interesting way.

who are we trying to reach?

Profile your audience, way beyond demographics. What are they like? What is his/her hidden agenda?

what do we want them to do, think and/or feel?

After the audience sees the communication or interacts with the thing we create, how do you want them to behave afterwards? What action, thought, or feeling do we want to provoke?

what is getting in the way?

Identify the barrier(s) that are standing in the way of success. It could be an emotion, it could be the category, whatever it is, bring it to life so that the creative teams have an enemy.

what is the starting point?

This is the main idea as you currently have thought of it. This should be a succinct summary.

why can we say that?

This will support the idea in the statement above. It's the proof for why we can say what we say is our starting point.

what is the social or engagement insight?

All ideas are released into a social world now. We must be thinking of where they will go afterwards. Offer a starting thought here.

what are the deliverables?

The specific asks of the creative team go here.

what is the budget/timing?

Provide a few details on what the budget is.

APPENDIX: PEER EVALUATION FORM

Please evaluate your team members on their work in helping you meet the team’s goals on this project. Your evaluation will remain confidential. Your teammates will never see it.

This form is due before your group presentation.

Your Name: _____

Team Name: _____

1) List your name AND the other members of your team. As a percentage, estimate each member’s contribution to the team wowing us with an *insightful, compelling presentation*:

TEAM MEMBERS’ NAMES	PERCENT OF TOTAL CONTRIBUTION
a) _____	_____
b) _____	_____
c) _____	_____
d) _____	_____
e) _____	_____
TOTAL MUST EQUAL 100%	

2) Did anyone really contribute in special ways? Who and how?

3) Comments or explanations for allocation in #1.

“It is amazing how much you can accomplish when it doesn't matter who gets the credit.”

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