

ACCOUNT PLANNING JOMC 491.8

1) WHY THIS COURSE

We are now living and working in the conceptual age¹. 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, designing inspiring strategies, and working 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) LOGISTICS / CONTACT INFORMATION

WHERE	Carroll 143
WHEN	Wednesdays 6p – 8.40p
INSTRUCTOR EMAIL	joshcarlton@unc.edu
CLASS TWITTER	@UNCPlanners and/or #UNCPlanners
OFFICE HOURS	By appointment only

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 four key modules:

- 1. **Planning**: Understanding of account planning and strategy, why it is valuable, and why creativity is important to strategy.
- 2. **Creativity**: Inspiring and sparking creativity, starting from what it means to be creative, to writing effective briefs, and working with creatives. Creativity can't really be *taught* in the classic sense, so we will have many hands-on exercises.
- 3. **Storytelling**: Persuading others by telling stories that present your ideas effectively in writing and in presentation form.
- 4. **Provoking**: Providing a spark inside a company, learning how and when to push colleagues to think in new ways.

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
- ➡ Inspire those around you through effective storytelling
- ➡ Provoke your colleagues and organizations

6) A VISUAL GUIDE TO THIS COURSE

We will begin with a foundational understanding of account planning, and will then move into the subdisciplines of creativity, storytelling and provoking.



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, \$17 paperback)
- 2. The Creative Habit by Twyla Tharp and Mark Reiter (\$10 e-book, \$12 paperback)
- 3. Presentation Zen by Garr Reynolds (\$10 e-book, \$23 paperback highly recommended)

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 <u>apply the knowledge</u> gained in reading – read the articles with an eye to how they 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:

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

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

Anything from these sites and others could spark your blog post for that week (if a topic is unassigned).

13) ASSIGNMENTS

There will be <u>no mid-term exam</u> and <u>no final exam</u> in this course. You will <u>learn by doing</u> – 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 brands.

14) LATE ASSIGNMENTS POLICY

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

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

15) WEEKLY / ONGOING ASSIGNMENT DETAILS

In addition to being prepared for class discussion every week, students will complete two assignments on a weekly basis. One before class and one immediately after each class session (before leaving that day):

1. **Blog:**

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 1 post a week, with links and embedded content to communicate effectively. During some weeks, the topics might be directed by the instructor, and during other weeks you should find a news article or blog post and write an analysis or response to that article.

These entries are due by the Monday of that week's class at 6p. Please be prepared to present your week's content and findings — 3–4 students will be chosen at random to kick off class with a quick presentation of their post from that week. Blog entries will be graded on a simple check-plus, check, check-minus scale.

2. Index Card Summary:

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

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.

17) INDIVIDUAL ASSIGNMENT DETAILS

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

1. Creative Interviews

To help you get inside the mind of a creative person, you will interview two people (separately) you believe are creative. They could be someone you know, or people you haven't yet met. The people you select are entirely up to you – artists, entrepreneurs, professors, authors, photographers, designers, ad agency professionals – as long as they are involved in creative pursuits on a daily basis.

After conducting your interviews, you will write a <u>paper (1000 words max)</u> 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.

18) GROUP ASSIGNMENT DETAILS

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

1. Street Crossing Observation & Presentation

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 – <u>binge drinking</u> among college students. Please do not talk to anyone – this is strictly an exercise in watching and developing a strategy from what you observe.

In a short (8 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?

2. **POV**

With your group from class, you will pick any one of the top 25 brands in the world (via Interbrand's 2013 Best Global Brands List) and write a compelling argument in the form of both:

- 1) a written Point-of-View (1500 words max) and
- 2) a presentation (10 minutes max)

...to convince its CMO (Chief Marketing Officer) to spend <u>HALF</u> of their brand's 2015 marketing budget on one of the following (pick only one):

- Mobile marketing
- Social good programs
- Social media programs
- Content creation

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

- What is the brand's position in the marketplace? What does it stand for?
- Who are they trying to reach?
- What are the brand's objectives?
- How would your proposed marketing activities benefit the brand?
- What are the risks?

3. Creative Brief & Creative Briefing

With your group from class, pick a client from the list below and compose a creative brief to solve their problem of being more relevant to college students. You will need to put a finer point on the problem, profile the audience, identify the tone the brand should take, and fill out the key parts of a creative brief (in 1 page max).

Next, lead a (10-minutes max) creative briefing however you'd like, pretending the class is your creative team. More information on this assignment will come later in the semester.

List of clients (each group will be asked to submit a rank-order list of what they would like to work on):

- California Pizza Kitchen
- Cree
- Keurig
- Best Buy
- Outside magazine

19) A NOTE ON GROUP PROJECTS & PRESENTATIONS

For group assignments, each group must consist of 4 students, 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.

20) 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.

21) 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
WEEKLY 300 PTS	Blog (entries & stand-up presentations)	150
	Participation (incl. class discussion and index cards)	150
INDIVIDUAL 200 PTS	Creative Interviews Paper	200
	Street Crossing Presentation	125
<u>GROUP</u> 500 PTS	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 to discuss particular grades on assignments. These conversations work best in-person, and I will under no circumstances discuss grades via phone or email.

22) 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 <u>unexplained</u>.
- 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.

23) SEATING

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

24) 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.

25) WHAT YOU READ IN THE COURSE REGISTRATION BOOK

A study of the principles and tools of account planning, all in the pursuit of <u>connecting people with brands in new and interesting ways</u>. 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. <u>Students learn how to persuade</u>, <u>provoke and inspire others through creative briefs</u>, presentations and more.

26) INSTRUCTOR AVAILABILITY

Instructor office hours are by appointment only. Send an email with 2-3 proposed times, and I will pick one.

27) 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.

28) DETAILED COURSE SCHEDULE

CLASS	DATE	TOPIC, PRE-WORK, ASSIGNMENTS
		MODULE 1: ACCOUNT PLANNING
1	1/8	Introduction to Strategy & Planning, Spaghetti & Marshmallows An introduction to the course and what we will cover this semester, plus an exercise in creativity to get us started.
2	1/15	Planning is Dead! Long Live Planning! Planning's evolution in the digital age. Discussion of the big idea, insights and the impact of digital communication. Read: Text: The Practical Pocket Guide to Account Planning, Parts I ("Orientation) & II ("How An Ad Gets Made") Article/Presentation: Digital Strategy 101 http://www.slideshare.net/bud_caddell/digital-strategy-101-24081694
3	1/22	The Tools & Tricks of Planners, all in the Pursuit of Insights A deep dive into the language, tools and daily requirements of planners and strategists. Asking the right questions, knowing the difference between facts and insights Read: Text: The Practical Pocket Guide to Account Planning, Parts III ("Organized Chaos") & IV ("Tricks of the Trade") Article: Why is a Good Insight Like a Refrigerator? by Jeremy Bullmore
MODULE 2: CREATIVITY		

CLASS	DATE	TOPIC, PRE-WORK, ASSIGNMENTS
4	1/29	Why Strategy Must Be Creative Read: Text: The Creative Habit, Chapter 1 "I Walk into a White Room" & Chapter 2 "Rituals of Preparation" Article (your choice): Pick any one of the PDFs on the Jay Chiat Awards 2013 page – http://4asstrategyfestival.com/2013-winners/ Watch: TED Talk: Elizabeth Gilbert "Your elusive creative genius" http://www.ted.com/talks/elizabeth_gilbert_on_genius.html
5	2/5	Challenger Brands: The Impact of Constraints on Creativity The importance of tapping into culture to move brands and markets, especially when working with a small budget. Why identifying the right problem is key in providing a constraint to creativity. ASSIGNMENT DUE: Group work: Street Crossing Presentation
6	2/12	Creativity Builders & Killers How to work to spark creativity, and how you might kill it with the wrong comment or document. Read: Text: The Creative Habit, Chapter 5 "Before You Can Think out of the Box, You Have to Start with a Box" & Chapter 6 "Scratching" Article: How to Be Creative (PDF) by Hugh MacLeod
7	2/19	The Creative Brief & Briefing 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. Read: Text: The Creative Habit, & Chapter 7 "Accidents Will Happen" & Chapter 8 "Spine" Watch: TED Talk: David Kelly, "How to build your creative confidence" http://www.ted.com/talks/david_kelley_how_to_build_your_creative_confidence.html

CLASS	DATE	TOPIC, PRE-WORK, ASSIGNMENTS	
8	2/26	Working Through the Creative Process Working with creative teams and clients through the ideas/creation process Read: Text: The Creative Habit, Chapter 9 "Skill" & Chapter 10 "Ruts & Grooves"	
	MODULE 3: STORYTELLING, PERSUASIVE COMMUNICATIONS		
9	3/5	Where Does Creativity Come From? & Intro to Storytelling An introduction to persuasive communications. ASSIGNMENT DUE: Individual work: Creative Interviews Paper	
_	3/12	Spring Break	
10	3/19	Storytelling Part 2: The Importance of Preparation Why it's so important to prepare, how to prepare, and why this skill is vital for planners and strategists. Read: Text: Presentation Zen, Chapter 1 "Presenting in Today's World," Chapter 2 "Creativity, Limitations and Constraints" & Chapter 3 "Planning Analog" Watch: PSFK "Skills Of The Rockstar Planner: Communicating Ideas" http://www.youtube.com/watch?v=Sn40fvPDWeE#t=39	
11	3/26	Storytelling Part 3: Craft Matters Why it's not just about what you say, but how you say it. Read: Text: Presentation Zen, Chapter 4 "Crafting the Story," Chapter 5 "Simplicity: Why it Matters," & Chapter 6 "Presentation Design: Principles & Techniques" Watch: PSFK Conference – Rob Walker "Significant Objects" http://vimeo.com/18413594	

CLASS	DATE	TOPIC, PRE-WORK, ASSIGNMENTS
12	4/2	Storytelling Part 4: How to Connect Empathizing with an audience. Read: Text: Presentation Zen, Chapter 7 "Sample Slides", Chapter 8 "The Art of Being Completely Present" & Chapter 9 "Connecting With an Audience" Watch: TED Talk: John Bohannon "Dance vs. powerpoint, a modest proposal"
13	4/9	Storytelling Part 5: Persuasive Communications Summary Ending our module on storytelling with a wrap-up look at presenting, persuading, and filling in any final gaps. ASSIGNMENT DUE: Group work: POV (Paper & Presentation)
MODULE 4: PROVOKING		
14	4/16	The Importance of Failing Risk-taking in the right ways and how it can lead to a successful career. Read: Text: The Creative Habit, Chapter 11 "An 'A' in Failure" Text: Presentation Zen, Chapter 10 "The Journey Begins"
15	4/23	The Strategist as Provocateur Provoking in ways that improve the organizations you work in – not just for the sake of "poking the bear." Read: Article: Poke the Box workbook (PDF): http://glennmeder.files.wordpress.com/2011/03/pokethebox_workbook_printable.pdf Watch: Scott Belsky "Making Ideas Happen" speech: http://www.youtube.com/watch?v=lsQtptwMCFI
_	5/1	Finals ASSIGNMENT DUE: Group work: Creative Brief & Briefing Presentations

