



## ACCOUNT PLANNING // SYLLABUS & SCHEDULE UNC MEJO 390.002 // SPRING 2017

### 1) WHY THIS COURSE

We are living and working in the *conceptual age*<sup>1</sup>. 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 a cinematic TV ad to air during the Super Bowl, or a full-page print ad in *USA TODAY*. Today's great communications ideas still include these methods, but the future lies in creating ideas that live where they can best thrive – from Facebook and Instagram, to gaming, new product development, retail spaces, and so much more. Strategy is now more important than ever. With so many options available for communication, companies need help discerning where to focus their energy.

This course will prepare you for this new age of work by exercising your creative, writing and presentation muscles. This course will 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

<b>INSTRUCTOR</b>	Josh Carlton
<b>MOST DAYS</b>	Insights Director, The PARAGRAPH Project
<b>ON TUESDAYS</b>	Adjunct Professor, UNC School of Media and Journalism
<b>COURSE LOCATION</b>	Carroll 283
<b>COURSE DAY TIME</b>	Tuesdays 2.00pm — 4.30pm
<b>INSTRUCTOR EMAIL</b>	<a href="mailto:joshcarlton@unc.edu">joshcarlton@unc.edu</a> // <a href="mailto:josh@theparagraphproject.com">josh@theparagraphproject.com</a> (for emergencies)
<b>COURSE TWITTER</b>	@UNCPlanners and #UNCPlanners17
<b>OFFICE HOURS</b>	Tuesdays from approx. 12.30pm — 1.30pm at a TBD location. The on-campus or near-campus location will be emailed to the class on Monday evening or Tuesday morning. Other appointment times, including the time period immediately following class, are available upon request.

<sup>1</sup> 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?

If you are interested in what powers great communications ideas, creativity, and strategy, you should take this course. As you've learned in other classes in the School of Media and Journalism, the definition of *brand communications* has dramatically changed over the last decade. Now, in the world of Kickstarter, ad blockers, 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 an overall understanding of account planning and creative strategy (the umbrella), and will then move into the sub-disciplines of research & insights (module 1), creativity (module 2) and persuasive communications (module 3).



### 7) EXPECTATIONS / FIVE THINGS I ASK OF YOU

1. **Attend.** We meet one day 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 STRATEGY JOB?

No single course can guarantee you a job in strategy. 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. Paperbacks are recommended for all books:

1. *The Practical Pocket Guide to Account Planning* by Chris Kocek (\$10 e-book, \$20 paperback) // [link](#)
2. *The Creative Habit* by Twyla Tharp and Mark Reiter (\$13 e-book, \$12 paperback) // [link](#)
3. *HBR Guide to Persuasive Presentations* by Nancy Duarte (\$11 e-book, \$16 paperback) // [link](#)

### 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 fresh news articles from magazines or bloggers. A strategist must apply the knowledge gained in reading – read the books and articles with an eye to how the concepts can be applied in this course.

### 11) LECTURE HANDOUTS

Handouts and key slides from course sessions will be posted on Sakai during the week following our course session.

### 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 will 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 (many decent apps are \$2 or less). Here is a starter list:

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

### 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

No late assignments will be accepted. Assignments are discussed in class on the day they are due.

Please make arrangements with me ahead of time – via email – to submit an assignment before our class meets, 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 label doesn't count towards your words.

### 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.

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 interesting ideas from this week's reading?
- b. Do the student's 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 laptop 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.

**19) GRADING POLICY**

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

	<b>Assignment</b>	<b>Value</b>
<u>INDIVIDUAL</u> <u>500 PTS</u>	Blog	100
	Participation (class discussions, asking questions of guests, labs, and index cards)	200
	Creative Interviews Paper	200
<u>GROUP</u> <u>500 PTS</u>	Street Crossing Presentation	100
	POV Presentation	200
	Creative Brief & Briefing Presentation	200
	<b>TOTAL</b>	<b>1000</b>

Grades will be assessed on the following scale:

- A: Outstanding level of thought, effort and attention to details.
  - A 94-100
  - A- 90-93
- B: Good level of thought, effort and attention to details.
  - B+ 87-89
  - B 84-86
  - B- 80-83
- C: Assignment is complete. Thought, effort and attention to details about par.
  - C+ 77-79
  - C 74-76

- C- 70-73  
D: Assignment is incomplete and/or lacking effort.  
D+ 67-69  
D 64-66  
D- 60-63  
Below: Assignment is non-existent or severely lacking effort.  
F 0-59

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 2 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) 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.

I expect that each student will conduct himself or herself within the guidelines of the University's honor system (<http://honor.unc.edu>). All academic work should be done with the high levels of honesty and integrity that this University demands. You are expected to produce your own work in this class. Using a set-up sound bite is a violation of the honor code. If you have any questions about your responsibility or your Instructor's responsibility as a faculty member under the Honor Code, please see the course Instructor or Senior Associate Dean Charlie Tuggle, or you may speak with a representative of the Student Attorney Office or the Office of the Dean of Students.

## 22) ACEJMC ACCREDITATION — PROFESSIONAL VALUES & COMPETENCIES

The School of Media and Journalism'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, classes in the School of Media & Journalism are designed to build your abilities in all 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

### **23) SEEKING HELP**

If you need individual assistance, it's your responsibility to meet with the Instructor. If you are serious about wanting to improve your performance in the course, the time to seek help is as soon as you are aware of the problem – whether the problem is difficulty with course material, a disability, or an illness.

### **24) DIVERSITY**

The University's policy on Prohibiting Harassment and Discrimination is outlined in the Undergraduate Bulletin: <http://www.unc.edu/ugradbulletin/>. UNC is committed to providing an inclusive and welcoming environment for all members of our community and does not discriminate in offering access to its educational programs and activities on the basis of age, gender, race, color, national origin, religion, creed, disability, veteran's status, sexual orientation, gender identity, or gender expression.

Special needs: If you have any disability or other special situation that might make it difficult to meet the requirements described above, please discuss it with me as soon as possible. If you have not done so already, you should also contact the Department of Accessibility Resources & Service (AR&S) at 919-962-8300 or [accessibility@unc.edu](mailto:accessibility@unc.edu).

### **25) SPECIAL ACCOMODATIONS**

If you require special accommodations to attend or participate in this course, please let the instructor know as soon as possible. If you need information about disabilities visit the Department of Disability Services website at <http://disabilityservices.unc.edu/>

### **26) WHAT YOU READ IN THE COURSE REGISTRATION BOOK**

A study of the principles and tools of strategists and account planners all in the pursuit of connecting people with brands in new and interesting ways. This course focuses on three main areas: insights, creativity, and persuasion. First, how to uncover compelling customer, competition and brand insights through research. Second, how to spark creativity in others and in yourself using those insights. Finally, the course will cover how to persuade, provoke and inspire others through creative briefs, presentations and more.

### **27) 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.

### **28) SCHEDULE CHANGES**

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

### **29) GRADUATE STUDENT CONDITION**

Graduate Students interested in this course topic must also register for an independent study if course credit is desired. Please see the Instructor on the first day of class for details.

Graduate Students will be asked to complete an extra assignment for each module, as outlined by the Instructor. Please meet with the Instructor as soon as possible for more details on these assignments, if this applies to you.



**30) DETAILED COURSE SCHEDULE**

The Instructor reserves the right to change this schedule to accommodate guest speakers & class needs.

CLASS	DATE	TOPIC	PRE-WORK	ASSIGNMENTS
<b><u>MODULE 1: INSIGHTS</u></b>				
1	1/17	<p><b>Course Introduction</b></p> <p>&gt; An introduction to the course and what we will cover this semester, plus an exercise in creativity to get us started</p>	<p><u>Read:</u></p> <p><b>Article (your choice of at least one of these):</b> Jay Chiat Awards Case Studies: <i>Adoption</i>, <i>Right-Hand Diamond Ring</i>, or <i>TLC</i>.</p>	
2	1/24	<p><b>Strategy's Context</b></p> <p>&gt; Getting our bearings inside and outside of agencies to understand the strategist's context</p>	<p><u>Read:</u></p> <p><b>This Course Syllabus &amp; Assignments Details</b></p> <p><b>Text:</b> <i>The Practical Pocket Guide to Account Planning</i>, Parts I ("Orientation") &amp; II ("How An Ad Gets Made...")</p> <p><b>Article (your choice of at least one of these):</b> Pick any of the <a href="#">PDFs on the Jay Chiat Awards 2016 page</a></p>	
3	1/31	<p><b>Insights</b></p> <p>&gt; Knowing the difference between facts and insights</p>	<p><u>Read:</u></p> <p><b>Text:</b> <i>The Practical Pocket Guide to Account Planning</i>, Parts III ("Organized Chaos...") &amp; IV ("Tricks of the Trade")</p> <p><b>Article:</b> <a href="#">Why is a Good Insight Like a Refrigerator?</a> by Jeremy Bullmore</p>	
4	2/7	<p><b>Brand Purpose</b></p> <p>&gt; Why a brand purpose is better than a brand positioning</p> <p>&gt; Exploration of various brand &amp; strategy frameworks</p>		<p><b>Street Crossing Presentations</b></p>

CLASS	DATE	TOPIC	PRE-WORK	ASSIGNMENTS
<b>MODULE 2: CREATIVITY</b>				
5	2/14	<b>Defining the Business Problem</b> > Asking the right questions, in the right ways. > Why identifying the right problem is key in providing a constraint to creativity.	<u>Read:</u> <b>Text:</b> <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"	
6	2/21	<b>How to Spark Creativity</b> > How to craft compelling brand purpose statements > How to work to spark and nurture creativity in you and in other people.	<u>Read:</u> <b>Text:</b> <i>The Creative Habit</i> , Chapter 1 "I Walk into a White Room" & Chapter 2 "Rituals of Preparation" <b>Article:</b> <a href="#">How to Be Creative</a> (PDF) by Hugh MacLeod  <u>Watch:</u> <b>TED Talk:</b> <a href="#">Elizabeth Gilbert "Your elusive creative genius"</a>	
7	2/28	<b>The Creative Brief &amp; Briefing</b> > 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.	<u>Read:</u> <b>Text:</b> <i>The Creative Habit</i> , Chapter 7 "Accidents Will Happen" & Chapter 8 "Spine"  <u>Watch:</u> <b>TED Talk:</b> <a href="#">David Kelly, "How to build your creative confidence"</a>	<b>Three (3) Blog Entries</b>
8	3/7	<b>Working Through the Creative Process</b> > Working with creative teams and clients through the ideas/creation process	<u>Read:</u> <b>Text:</b> <i>The Creative Habit</i> , Chapter 9 "Skill" & Chapter 10 "Ruts & Grooves"	<b>Creative Interviews Paper</b>
—	3/14	No Class Spring Break		

CLASS	DATE	TOPIC	PRE-WORK	ASSIGNMENTS
<b><u>MODULE 3: PERSUASION</u></b>				
9	3/21	<b>The Importance of Preparation</b> > Why it's so important to prepare, how to prepare, and why this skill is vital for planners and strategists.	<u>Read:</u> <b>Text:</b> <i>HBR Guide to Persuasive Presentations</i> , Sections 1–3 ("AUDIENCE," "MESSAGE," "STORY")  <u>Watch:</u> <b>PSFK</b> " <a href="#">Skills Of The Rockstar Planner: Communicating Ideas</a> "	
10	3/28	<b>Craft Matters</b> > Why it's not just about what you say, but how you say it.	<u>Read:</u> <b>Text:</b> <i>HBR Guide to Persuasive Presentations</i> , Sections 4–5 ("MEDIA" & "SLIDES")  <u>Watch:</u> <b>PSFK Conference</b> – <a href="#">Rob Walker</a> " <a href="#">Significant Objects</a> "	
11	4/4	<b>How to Connect</b> > Empathizing with an audience.	<u>Read:</u> <b>Text:</b> <i>HBR Guide to Persuasive Presentations</i> , Sections 6–7 ("DELIVERY" & "IMPACT")  <u>Watch:</u> <b>TED Talk:</b> <a href="#">John Bohannon</a> " <a href="#">Dance vs. powerpoint, a modest proposal</a> "	
12	4/11	<b>Persuasive Communications In Summary</b> > A wrap-up look at persuading, and filling in any final gaps.		<b>Brand Purpose Presentation</b>

CLASS	DATE	TOPIC	PRE-WORK	ASSIGNMENTS
<b><u>BRINGING IT ALL TOGETHER</u></b>				
13	4/18	<b>Lab: Strategy Sprint</b> > Brand/project TBD		<b>All Remaining Blog Posts</b>
14	4/25	<b>The Importance of Failing</b> > Risk-taking in the right ways and how it can lead to a successful career.	<u>Read:</u> <b>Text:</b> <i>The Creative Habit</i> , Chapter 11 "An 'A' in Failure"	
—	5/2	<b>Tentative: Final Presentations at 4.00pm</b>		<b>Creative Brief &amp; Briefing Presentations</b>