

# CREATIVE STRATEGY / ACCOUNT PLANNING // SYLLABUS & SCHEDULE

## UNC MEJO 373 // SPRING 2019

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### 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. It's as much about what *not* to do as it is about what to do.

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

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

### COURSE LOGISTICS & CONTACT INFORMATION

<b>INSTRUCTOR</b>	Josh Carlton (please call me Josh)
<b>MOST DAYS</b>	Founder, 500THz
<b>OTHER DAYS</b>	Lecturer, UNC School of Media and Journalism
<b>COURSE LOCATION</b>	Carroll 141
<b>COURSE DAY &amp; TIME</b>	Friday 9:00am-11:45am
<b>INSTRUCTOR EMAIL</b>	<a href="mailto:joshcarlton@unc.edu">joshcarlton@unc.edu</a> // <a href="mailto:josh@500thz.com">josh@500thz.com</a>
<b>COURSE TWITTER</b>	@UNCPlanners and #UNCPlannersSpring19
<b>OFFICE HOURS</b>	Office Hours are available by appointment only, either in-person or via phone. Please email the Instructor with 2-3 possible meeting times.

<sup>1</sup> Alan Greenspan, former chairman of the Federal Reserve Board; Daniel Pink, author; Tom Kelley, founder of IDEO; many others.

## 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 “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 that will enable you to bring out your own creativity.
3. **Persuasion:** Persuading others by telling stories well that present your ideas effectively in writing and in presentation form.

## INTENDED AUDIENCE / WHO SHOULD TAKE THIS COURSE?

If you are interested in what powers great communications ideas, creativity, and human behavior, 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*.

## LEARNING OBJECTIVES FOR THIS COURSE

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

## 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 study or two to talk about in interviews.

## 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).



## EXPECTATIONS / FIVE THINGS I ASK OF YOU

1. **Attend.** We meet one day a week, making each session worth two (2) classes. Timely attendance is 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 willing to put yourself out there, and not judge others.

## REQUIRED BOOKS

There are 3 required books in this course:

1. Pierno, Adam (2017), *Under Think It: A Marketing Strategy Guidebook for Everyone, 1st ed.* Columbia, SC: Santy. ISBN: 0999399004
2. Tharp, Twyla and Mark Reiter (2006), *The Creative Habit: Learn It and Use It for Life.* New York: Simon & Schuster. ISBN: 0743235274
3. Duarte, Nancy (2012), *HBR Guide to Persuasive Presentations (HBR Guide Series).* Boston: Harvard Business Review Press. ISBN: 1422187101

## REQUIRED ARTICLES

Required articles, book excerpts, and case studies are listed in the detailed course schedule. Any other required articles will be distributed via email/Sakai 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. Active reading leads to active learning.

## LECTURE HANDOUTS

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

## ASSIGNMENTS

You will learn by doing in this course – actively participating, creating and thinking. Assignments are designed to equip you with the skills to work on real-world problems.

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

## LATE ASSIGNMENTS POLICY

No late assignments will be accepted. No excuses. Students will receive a zero (0) on any late assignments. An assignment that is one (1) second late is considered late.

Please make arrangements with me ahead of time – via email – to submit an assignment before our class meets, if you know of a conflict.

**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 world, 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:

<p><b>Web</b>  <a href="http://kottke.org">kottke.org</a>  <a href="http://wired.com/blogs">wired.com/blogs</a>  <a href="http://readwrite.com">readwrite.com</a>  <a href="http://avc.com">avc.com</a>  <a href="http://zephoria.org/thoughts">zephoria.org/thoughts</a></p>	<p><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></p>	<p><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://droga5.com/news">droga5.com/news</a>  <a href="http://kickstarter.com/blog">kickstarter.com/blog</a>  <a href="http://hugeinc.com/ideas">hugeinc.com/ideas</a></p>	<p><b>Industry News</b>  <a href="http://fastcompany.com">fastcompany.com</a>  <a href="http://TheDrum">TheDrum</a>  <a href="http://adfreak.com">adfreak.com</a>  <a href="http://@fastcodesign">@fastcodesign</a>  <a href="http://WARC">WARC</a></p>
<p><b>Creativity</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></p>	<p><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></p>	<p><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://@bethcomstock">@bethcomstock</a>  <a href="http://markpollard.net">markpollard.net</a></p>	<p><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></p>

**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 4"x6" 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?

**WRITTEN ASSIGNMENTS SPECS**

For written assignments, 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.

**GROUP PROJECTS & PRESENTATIONS**

Group work is designed to bring the elements of the course together, and to encourage collaboration with others. For the two (2) group assignments, each group must consist of 4 students MAX. Groups will be randomly assigned before the second class session.

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.

**CLASS PARTICIPATION**

Grading 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.

**ATTENDANCE**

- a. Timely 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. The doors will close at 9:00am.
- 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 or tardiness will result in a forfeit of Class Participation for that day.
- f. Two 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.

**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>600 PTS</u>	Class Participation (class discussions, asking questions of guests, labs, and index cards)	100
	Midterm Exam	250
	Creative Interviews Paper	250
<u>GROUP</u> <u>400 PTS</u>	Street Crossing Presentation	200
	Brand Promise Presentation (final)	200
	<u>TOTAL</u>	<u>1000</u>

Grades will be assessed on the following scale:

A: Exceptional level of thought, effort and attention to details.

A 95-100

A- 90-94

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 60-66

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 48 hours after receiving a grade before reaching out to me, to allow for time to process the grade in a rational manner.

### **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. 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.

### **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 and 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

### **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.

### **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).

### **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/>

### **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.

### **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.

**SPRING 2019 // DETAILED COURSE SCHEDULE**

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

CLASS	DATE	TOPIC	PRE-WORK	DUE
<b>MODULE 1: INSIGHTS</b>				
1	1/11	<b>Course Introduction</b> > Introducing the course and what we will cover this semester	Read: <b>Article:</b> <a href="#">Tell Me What You Read, and I'll Tell You Who You Are</a> by Zat Rana	—
2	1/18	<b>Understanding Strategy's Context</b> > Getting our bearings inside and outside of agencies to understand the strategist's context	Read: <b>Account Planning Course Syllabus &amp; Course Assignment Details</b>  Text: <i>Under Think It</i> , Pages 1-53 <b>Article (your choice of at least one of these — available on Sakai):</b> Jay Chiat Awards Case Studies: <i>Adoption, Right-Hand Diamond Ring, or TLC.</i> <b>Article:</b> <a href="#">Why is a Good Insight Like a Refrigerator?</a> by Jeremy Bullmore	—
3	1/25	<b>Uncovering Insights &amp; Role of Research</b> > Knowing the difference between facts and insights	Read: Text: <i>Under Think It</i> , Pages 54-100 <b>Book Excerpt:</b> Hall, E. (2013). Chapter Five: User Research. In <i>Just Enough Research</i> . <b>Article (your choice of at least one of these):</b> Pick any of the <a href="#">PDFs on the Jay Chiat Awards 2017 page</a>	—
4	2/1	<b>Creating a Compelling Brand Promise Statement</b> > Why brand promise vs. a brand positioning	Read: <b>Book Excerpt:</b> Neumeier, M. (2003). Introduction. In <i>The Brand Gap: How to Bridge the Distance Between Business Strategy and Design</i> . <b>Book Excerpt:</b> Miller, D. (2017). Chapter Five: Has A Problem. In <i>Building a Story Brand</i> . <b>Article:</b> Levitt, T. (1960). Marketing Myopia. Harvard Business Review.	—

CLASS	DATE	TOPIC	PRE-WORK	DUE
<b>MODULE 2: CREATIVITY</b>				
5	2/8	<p><b>Writing Compelling Creative Briefs &amp; Leading Inspiring Briefings</b></p> <p>&gt; Review of the sections on a creative brief, review of many different types of briefs from various agencies.</p> <p>&gt; Discussion on the role of the briefing.</p>	<p><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" &amp; Chapter 6 "Scratching"  <b>Article:</b> "Creativity in Advertising: When it Works and When it Doesn't." Harvard Business Review, March 2013.</p>	<b>Street Crossing Presentations</b>
6	2/15	<p><b>Defining the Right Business Problem</b></p> <p>&gt; Asking the right questions, in the right ways.</p> <p>&gt; Why identifying the right problem is key in providing a constraint to creativity.</p>	<p><u>Read:</u>  <b>Text:</b> <i>Under Think It</i>, Pages 101-140; <i>The Creative Habit</i>, Chapter 7 "Accidents Will Happen" &amp; Chapter 8 "Spine"</p> <p><u>Watch:</u>  <b>TED Talk:</b> <a href="#">David Kelly, "How to build your creative confidence"</a></p>	—
7	2/22	<p><b>Sparking Creativity</b></p> <p>&gt; How to craft compelling brand promise statements</p> <p>&gt; How to work to spark and nurture creativity in you and in other people.</p>	<p><u>Read:</u>  <b>Text:</b> <i>The Creative Habit</i>, Chapter 1 "I Walk into a White Room" &amp; Chapter 2 "Rituals of Preparation"  <b>Article:</b> <a href="#">How to Be Creative</a> (PDF) by Hugh MacLeod</p> <p><u>Watch:</u>  <b>TED Talk:</b> <a href="#">Elizabeth Gilbert "Your elusive creative genius"</a></p>	—
8	3/1	<p><b>Working Through the Creative Process</b></p> <p>&gt; Working with creative teams and clients through the ideas/creation process</p>	<p><u>Read:</u>  <b>Text:</b> <i>The Creative Habit</i>, Chapter 9 "Skill" &amp; Chapter 10 "Ruts &amp; Grooves"</p>	<b>Take-Home Midterm Exam</b>

CLASS	DATE	TOPIC	PRE-WORK	DUE
9	3/8	<b>Design Thinking: Strategy Sprint</b> Client TBD	<p><u>Read:</u>  <b>Book Excerpt:</b> 50 ways to get started. In <i>Brain Surfing</i>.  <b>Article:</b> An Introduction to Design Thinking Process Guide. <a href="#">Link</a>.</p> <p><u>Listen:</u>  <b>Podcast:</b> Listen So Hard It Hurts. How to Use Design Thinking in Research. <a href="#">Link</a>.</p>	—
—	3/15	NO CLASS > Spring Break	—	—
<b>MODULE 3: PERSUASION</b>				
10	3/22	<b>Preparing Effectively</b> > Why it's so important to prepare, how to prepare, and why this skill is vital for planners and strategists.	<p><u>Read:</u>  <b>Text:</b> <i>HBR Guide to Persuasive Presentations</i>, Sections 1–3 ("AUDIENCE," "MESSAGE," "STORY")  <b>Article:</b> "<a href="#">Doing the Hard Work to Make it Clear</a>" by Russell Davies</p> <p><u>Watch:</u>  <b>PSFK</b> "<a href="#">Skills Of The Rockstar Planner: Communicating Ideas</a>"</p>	—
11	3/29	<b>Crafting the Right Story</b> > Why it's not just about what you say, but how you say it.	<p><u>Read:</u>  <b>Text:</b> <i>HBR Guide to Persuasive Presentations</i>, Sections 4–5 ("MEDIA" &amp; "SLIDES")  <b>Article:</b> "<a href="#">Doing the Hard Work to Make it Big</a>" by Russell Davies</p> <p><u>Watch:</u>  <b>PSFK Conference</b> – <a href="#">Rob Walker</a> "<a href="#">Significant Objects</a>"</p>	<b>Creative Interviews Paper</b>

CLASS	DATE	TOPIC	PRE-WORK	DUE
12	4/5	<b>Connecting with Audiences</b> > Using empathy to connect with an audience while presenting.	<u>Read:</u> <b>Text:</b> <i>HBR Guide to Persuasive Presentations</i> , Sections 6–7 (“DELIVERY” & “IMPACT”) <b>Article:</b> <a href="#">“Doing the Hard Work to Make it Bearable”</a> by Russell Davies  <u>Watch:</u> <b>TED Talk:</b> <a href="#">John Bohannon “Dance vs. powerpoint, a modest proposal”</a>	—
13	4/12	<b>Closing the Presentation</b> > A final look at persuasive communications	<u>Read:</u> <b>Book Excerpt:</b> Selected Chapters from Humes, J. (2002). <i>Speak Like Churchill, Stand Like Lincoln: 21 Powerful Secrets of History's Greatest Speakers</i> .	—
—	4/19	NO CLASS > Holiday	—	—
<b><u>WRAP-UP</u></b>				
14	4/26	<b>Bringing it All Together</b> > Risk-taking in the right ways and how it can contribute to a successful career.	<u>Read:</u> <b>Text:</b> <i>The Creative Habit</i> , Chapter 11 “An ‘A’ in Failure”	—
15	5/3	<b>Final @ 4pm</b> <b>Carroll Hall Room 141</b>		<b>Brand Promise Presentations</b>