# JOUR 4473 ACCOUNT PLANNING

# Department Instructor

Journalism Lucy M. Brown

# Course prefix and number Course title Class size/type

JOUR 4473 (Upper level/Graduate standing) Account Planning Maximum 16/Lab

**Required textbook**

Larry D. Kelley and Donald W. Jugenheimer (2014), Advertising Account Planning: Planning and Managing an IMC Campaign.

ISBN-13: 978-0765640369

**Additional reading**

* + - * Marye Tharp (2014) Transcultural Marketing: Building Customer Relations in Multicultural America. Armonk, New York: M.E. Sharpe
* Hart Weichselbaum (2008) Readings in Account Planning (articles from Bendinger, Gladwell, Baskin, Pollitt and Gordon, Feldwick, Bedbury and Hedges)
* Steel, Jon (1996) Truth, Lies and Advertising: The Art of Account Planning, New York, John Wiley.

**Additional reading for graduate students**

* + - * Barbara Mueller (2007) Communicating with Multicultural Consumer: Theoretical and Practical Perspectives
* Academic Journal articles covering a range of racial, ethnic cultures and sub-groups in the United States of America (e.g., African Americans, Latinos, Asian Americans, women, tastemakers, etc. In addition, current journal articles on issues relevant to the media topics covered for the specific semester. (See page 3 and 4 for examples students may read for spring 2017)

# Course description

# JOUR 4473 Account Planning (Sp, Fa). 3 hours

An introduction to applied advertising research and account planning, integrating consumers’ perspectives into creative strategy. A writing and data analysis course with emphasis on research for developing and evaluating advertising messages for diverse cultures. *Prerequisite:* Minimum 90 hours completed, no in-progress hours or coursework accepted, 2.5 overall GPA, completion of JOUR 1033 with a grade of C or better, and completion of JOUR 3723 and JOUR 3743, with a grade of B or better; or graduate standing.

**Course instructor**

Dr. Lucy Brown worked as an account planner for major national advertising agencies and advertisers, also serving as a vice president and director of research and strategic planning at a major national agency. She earned a Ph.D. in Advertising from the University of Texas-Austin, and an MS in Communication Design from the Pratt Institute.

**Justification for Course**

**Role of an account planner is critical to producing effective marketing communication:** An account planner is a researcher and communication strategist who is responsible in the advertising agency for integrating the consumers’ perspective in the development of all marketing communication efforts. This includes consumer communication research, message design and the media selection. The planner is not only the advocate for the voice of the consumer, but also a steward of the brand who ensures that the message is in sync with the brand’s image and core values. A good planner keeps current with pop-culture trends, writes creative briefs and helps inspire creatives to produce messages that are insightful, truthful, strategically sound and appropriate, while achieving the company’s pre-set marketing communication goals. Importantly, the planner ensures that the creative work is on strategy and its impact is tracked and adjusted as required.

**Account Planning is an established function in agencies and some marketing departments.** Account planning is a function in most medium and large US advertising agencies. On the client side, some companies such as AT&T have also introduced planning in their marketing communication in-house teams. Account planning departments typically serve as the intellectual hub of the agency and there is a growing demand for planners who are knowledgeable about diverse consumer groups, not only in ad agencies but also in media agencies.

**Account Planning can serve as an alternative course for (JOUR 4453) Media Strategy and Planning.** While there are differences in content, most of the skills taught in this class are transferable to the media planning discipline as both courses cover developing communication and media strategy based on consumer research, utilizing a range of secondary sources including syndicated data, such as MRI or Simmons. Both courses have a substantial writing and data analysis components. Students also obtain hands-on experience to apply skills to real world research projects, similar to requirements of an entry-level planning position. Ad/PR students can therefore substitute this class for JOUR 4453.

**Account Planning is an established course in most top advertising curricula**. Many top advertising programs around the country such as University of Texas at Austin, Michigan State, Oklahoma State and Boston University are offering account planning courses, sometimes in addition to a general or advertising research methods course. This course will give advanced undergraduate and graduate students even more specialization within the department as well as training necessary for quality jobs in the field.

According to the Bureau of Labor Statistics, employment for advertising, promotions and marketing managers (including account planners) is expected to continue to grow faster than the average for all occupations. These management occupations require prospective employees to understand how to develop, conduct and use research in making strategic decisions. Account Planning will thus train students in the key concepts and skills needed to obtain first and subsequent jobs in the field.

**Course objectives and content**

The desired skills for an account planner are research, analysis, writing, cultural acumen and presentations, which would serve any entry-level position in journalism and mass communication, not just account planners. This course will emphasize the research, writing and cultural skills components. The course seeks to sharpen students’ cultural sensitivity skills, so they have a better understanding of groups (age, race/ethnicity, gender, etc.) to which they do not belong, as these skills are critical to have success as an account planning professional. The overall goal of this course is to teach students to translate research findings from quantitative data and qualitative information to meaningful, actionable consumer insights for creating innovative marketing communication, specifically relating to media selection and creative strategy.

***Specific outcomes*** *(On completion of the course, students should be able to do the following:)*

* Define the fundamentals of current account planning practices
* Recall contemporary secondary and syndicated sources commonly used for consumer research
* Explain selected theories impacting consumer behavior
* Identify and apply the basics of qualitative methods commonly used in advertising (brainstorming, focus groups, ethnography)
* Demonstrate an understanding of the advertising research process from exploration to reporting
* Practice to design a master creative brief (MCB) or copy platform informed by consumer insights gleaned from research
* Practice professional presentation and project writing skills suitable for ad agencies
* Compose positioning statements for marketing communication purposes
* Practice professional skills: teamwork, deadline discipline, leadership, etc.
* Apply analytical research skills and knowledge of different genders and ethnic and racial groups to avoid reinforcing stereotypes
* Employ the process required to develop insights for inter-cultural consumer markets
* Design questionnaires used for creative development or for evaluative copy-testing
* Critique advertisements from a psych-social perspective to practice critical thinking and problem solving skills
* Effectively evaluate market communication to determine if appropriate for the desired target audience and marketing context

Planners are often viewed as too “soft and creative” for marketing, yet too “market-driven and specialized” for mass communication. In this course a nod will be given to both the creative and the market-driven motives of advertising (intended impact of advertising), but this market-driven motivation will be presented in context of the overall societal implications of advertising messages (unintended impact of advertising). Students will also learn about context and understanding the cultural sensibilities of the target. The course will expose them to the importance of aesthetics for processing of market communication. They will also learn about the role of segmentation research in target identification. Finally they will be exposed to the importance of testing concepts across various audiences to avoid alienating potential consumer group or influencers.

# Description of instructional methodologies

# Instruction will include lectures, discussions, modeling, in-class activities (individual and small group), guest speakers, video/audio tapes, group projects, field-based activities, writing and presentations.

# Assessment of student learning

# Assessment of teaching outcome will include projects, presentations, short writing assignments, peer group evaluation, external expert evaluation of final projects and presentations.

**Assessment of graduate students vs. undergraduates**

* Undergraduates will work on their 10 - 15 page consumer project in groups (2 or 3), while graduate students will write individual papers
* Undergraduates will do group presentations, while graduate students will present individually
* The creative development or evaluation questionnaire project will be done as a class. Undergraduates will complete specific sections of the questionnaire, while the graduate students will produce a complete questionnaire. For example, the questionnaire will include screener questions as well as attitudinal, usage, perception, communication, purchase intent and demographic questions. Undergraduates will be responsible for one or two sections of the questionnaire, while each graduate student will be responsible for designing a complete questionnaire as well as providing instructions to the programmer for skip patterns, randomization and also formulating invitations, introductions to sections and a close to the questionnaire.
* Graduate students will get practice in writing moderator’s outline for a focus group.
* Undergraduates will take a multiple-choice test, while graduate students complete an annotated bibliography of specified research or scholarly articles.

**Approximate grade allocation**

1. Questionnaire development – **20%**
2. Brand positioning statement **– 5%**
3. Write a creative brief **– 10%.**
4. MC Test on Textbook/ Annotated Bibliography (graduates only) **– 10%**
5. Consumer research project – **30%**

Research and presentation **- 10%**

1. Participation: In- class assignments, attendance; punctuality; peer evaluation; Q&R **– 15%**

**See the next page for examples of journal articles graduate students will read in order to write an annotated bibliography of 10 articles minimum** (These will change, depending on specific topic and brand ads selected for analysis for the semester)

**Graduate student annotated bibliography – examples of articles**

(These will change, depending on specific topic and brand ads selected for analysis for the semester)

**Ethnic Diversity/Race**

Han, X., & Tsai, S. W. (2016). Beyond targeted advertising: Representing disenfranchised minorities in ‘inclusive’ advertising.

 *Journal of Cultural Marketing Strategy*, *1*(2), 154-169.

Sierra, J. J., Hyman, M. R., & Heiser, R. S. (2012). Ethnic identity in advertising: A review and meta-analysis.

 *Journal of Promotion Management*, *18*(4), 489-513.

Watson, S., Thornton, C. G., & Engelland, B. T. (2010). Skin color shades in advertising to ethnic audiences:

 The case of African Americans. *Journal of Marketing Communications*, *16*(4), 185-201.

Thomas, K. D. (2015). Advertising diversity: Ad agencies and the creation of Asian American consumers.

 *Consumption Markets & Culture*, 1-3.

**Age:**

Loroz, P. S., & Helgeson, J. G. (2013). Boomers and their babies: An exploratory study comparing psychological profiles and

 advertising appeal effectiveness across two generations. *Journal of Marketing Theory and Practice*, *21*(3), 289-306.

**Gender:**

Grau, S. L., & Zotos, Y. C. (2016). Gender stereotypes in advertising: A review of current research.

 *International Journal of Advertising*, 1-10.

Cortese, A. J. (2015). *Provocateur: Images of women and minorities in advertising*. Rowman & Littlefield.

**Digital/Mobile Advertising:**

Bakopoulos, V., Stuart, G., & Briggs, R. (2016). Measuring the value of mobile advertising in driving business outcomes:

 Empirical data from Coca-Cola, AT&T, MasterCard and Walmart. *Applied Marketing Analytics*, *2*(2), 169-179.

Becerra, E. P., & Korgaonkar, P. K. (2010). The influence of ethnic identification in digital advertising.

 *Journal of Advertising Research*, *50*(3), 279-291.

Grewal, D., Bart, Y., Spann, M., & Zubcsek, P. P. (2016). Mobile advertising: a framework and research agenda.

 *Journal of Interactive Marketing*, *34*, 3-14.

### Weekly Course Outline

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| Week 1 | Introduction: Key agency roles and the relationship with account planning function Deconstructing marketing communication messagesGraduates students receive reading list for annotated bibliography |
| Week 2 | History: History of account planning- UK/USA Account planning process and philosophy |
| Week 3 | CopyTesting: Creative development and evaluative research (qualitative/quantitative) |
|  Week 4 |  Questionnaire development workshop |
| Week 5 | Positioning: Attribute/Benefits/Brand Personality: Transforming attributes into Consumer Benefits (Review Tyson’s brand positioning statement & Walmart’s current brand guidelines) |
| Week 6 |  Positioning workshop  |
| Week 7 |  Exam / Submit Annotated Bibliography (graduates only) Guest speaker |
| Week 8 | Targeting: Segmentation, target definition, writing target profiles |
| Week 9 |  Understanding the consumer; marketing to diverse consumer groups |
| Week 10 | Creative Writing the creative brief/ The briefing processBriefs: |
| Week 11 |  Finding the consumer insight within the data/information |
| Week 12 |  Creative brief workshop |
| Week 13 | Consumer Selecting appropriate research based on research objectives; timing and budgetResearch: Focus group workshop |
| Week 14 |  Consumer research workshop |
| Week 15 |  Finalize all projects (questionnaire, positioning statement, brief, consumer research) |
| Week 16 |  Consumer research exam and presentation |