A PERENNIALLY SUCCESSFUL LIVE CASE PROJECT

Tom Jordan • Department of Journalism and Mass Communications
San Jose State University • San Jose CA 95192-0055 • 408/924-7555

ABSTRACT

As the capstone course in our advertising sequence, each fall we secure a business sponsor for a complete marketing communications campaign. The approximately 120 students taking the course each fall (we have about 500 advertising majors) are divided into teams of about ten students each and compete with each other in developing a complete campaign for the client. The client judges the campaigns based on a campaign book, similar to the ones used for the AAF competition in the spring semester, and a full day of presentations from each student agency. The course is enormously successful for the department, students, and the sponsor. And it's a money-raiser for the department, as the sponsor typically donates $7,000 to $10,000. Success of the program is dependent on tight faculty control to ensure delivery to the "client" of a valuable product.

BACKGROUND

The three of us stand at the back of the room and are again amazed at the level of professionalism our students are displaying in their presentations. Now advertising faculty, one of us was a senior account supervisor at Doyle, Dane, Bernbach; one the owner of the agency that did the Pet Rock campaign; and one a Leo Burnett copywriter. It may be self-delusion, but we agree that these students are far better than we were when we finished our college studies. Certainly their presentation skills are better. Almost every year, of the twelve agencies on the average that present, six to eight are agency-caliber presentations, three or four look like student presentations, and one or two don't really resemble much of anything. Our clients, who typically donate $7,000 to $10,000 to sponsor the competition, and avail themselves of any ideas generated, have unanimously agreed.

Students come to the course having completed all of the required courses in the sequence and almost all of their electives. All advertising majors, and minors, are required to take the course. The typical student is an advertising major with a marketing minor, the second most typical is a marketing major with an advertising minor.

We run the same course in the spring semester using the American Academy of Advertising (AAF) national competition as our case. Our school has won that competition twice, and we find it a worthwhile endeavor each year. It is such a good experience that we try to replicate it for the students who take the course during the fall semester, using a local sponsor. Because each campaign is a course, the same students never participate in both campaigns.

Client Identification and Solicitation

The fall capstone course really begins with identifying potential sponsors and soliciting their support for the fall campaign. This responsibility falls upon the faculty, although former students now working in the area have suggested clients and recommended course sponsorship to their employers. We try to identify three or four potential sponsors early in the year so that we can make a presentation to them and get a commitment by the end of the spring semester.

Some balk at the suggested donation, but we point out the benefits of the program and remind them that it's really only the production price of a single brochure or ad, and they're getting ten to twelve complete campaigns full of ideas. In addition, they get to preview the graduating class and see their work, and many sponsors have indeed used the competition to identify the ablest of our graduates and offer them positions. Many potential sponsors are intrigued by the prospect of having original research done (a normal component of the overall campaign), and like the price. Of course they're fulfilling corporate responsibility and building good will not only with the university but with all the students and their families (all of whom are invited to the presentations).

When they need convincing, we show them the books created by previous teams, with all the research, media plans, sales promotions, and creative. And we get excellent references from previous sponsors.

My belief is that people sponsor the competition about 50/50 for altruistic reasons—to give something back to the community— and sound business reasons— to get original research plus ten or twelve complete marketing communications campaign plans for what they'd pay an agency to develop an ad or two.

Invariably, the sponsors have been pleased, though they are sometimes surprised at the amount of work *they* have to put into a successful campaign.

Clients

Over the past five years, we have had as clients:

- A large dry-cleaning chain (> 80 retail outlets in the county).
- A water-slide theme park.
- The transportation (Bus) system for the neighboring county.
- The Convention & Visitor's Bureau for the local metropolis.
- A start-up data-base marketing/direct mail company.
- The top radio station, in its format, in our ADI.

Client/Sponsor Responsibilities

The first requirement of a sponsor is to provide the background information necessary for the campaign. The sponsor can define the problem and write the case with an assist from a faculty member; or a faculty member can interview the sponsor and write the case for review and approval by the sponsor. The sponsor must also provide as much detailed business information as possible, including:

- Marketing plan
- Sales trends and data
- Competitive information
- Existing research
- New product plans
- Deliverables desired (ads, brochures, media, etc.)

Clearly, much of this information is proprietary. Students are required to sign non-disclosure agreements, but some sponsors nonetheless choose not to divulge complete or accurate marketing data, particularly forecasts. (The real-world parallels extend to the client-agency relationship.)

The time commitment on the client's part can be controlled, but has a certain minimum requirement. Assembling all the relevant data and writing or reviewing the case requires quite a bit of time.

Clients meet Student Agencies

The second client commitment is at our first client question and answer session. This is the first meeting between the client and the student agencies. The students have been given the case and the background information. They have had a week or so to become acquainted with one another and to digest the case. At this meeting, the client's marketing and advertising people form a panel of four or five and field answers from the student agency account executives.

The agencies wear their "client clothes" to this meeting, and identify themselves with their agency name and logo on a large placard. Usually, a faculty member will moderate to give each agency two or three questions and enable them to make a positive impression on the client.

Client Tour

The next major commitment is a tour of the client's facilities or offices, usually with a question and answer session included. This tour follows the initial question and answer session by about a week, but is restricted to two or three representatives from each agency so as not to overwhelm the client. The tour is another opportunity for questions, and some hands-on experience for the students, to acquaint themselves with the client's product/service and operation. Sometimes two tours are scheduled to accommodate Tuesday/ Thursday schedules and Monday/Wednesday schedules.

Client Availability during Semester

Clients can control access to executives by student agencies. We do not, in other words, turn 100-plus students loose on a friendly client with a series of trivial questions. Clients can designate a certain person at their company as student agency liaison, and set aside several hours per week or per day for students to call in with questions. We (the faculty) insist that each student agency act responsibly, asking only pertinent questions, and dressing professionally whenever they appear at the client's place of business.

Client Review of Campaign Books

About a week before the final presentations, student agencies turn in their campaign books, 50 or 60 pages describing the entire campaign, from situation analysis through research, marketing, media, creative, and budget to evaluation. The *de facto* standard for the books is laser printing and spiral binding with color-comped creative and charts and graphs to support marketing, research, and media. The client's team reviews the books independently, using a suggested set of criteria provided by the faculty or worked out jointly between the faculty and the client. This commitment is a major one, as all teachers know. Even spending one hour reviewing one book may not do justice to the efforts expended to create it, and clients often find themselves devoting several evenings, days, or a weekend day to reviewing the books. To their credit, I find that clients are rigorous in their scrutiny of the books, and I'm sure they invest a lot of time, more than they had anticipated, in this review. On the other hand, as they see some of the fresh thinking and analysis, clients become aware at this stage of the wisdom of sponsoring the competition.

Presentation Day

This day is the biggest day so far in the life of most of our students. It's their first real presentation to a real-world client. They've worked extremely hard on this campaign and again on the presentation. It's an exciting day for the students, their families, the faculty, and the client. We begin with a continental breakfast at 8:00 a.m. while the first team is setting up for its presentation. Student agencies present their campaigns in a large room, using slides, microphones, and, very often, music. They must create their own slides (as they've done their own books), but we have the system in the department so they can do it for just the cost of the slide film and developing. We purchased the system with the client donations from previous years.

The client's panel of judges sits in the front row and watches the 15- to 20-minute presentation, then adjourns with the student team to a nearby room for a ten-minute question and answer session. This time the students are answering the questions or defending their decisions and recommendations. Invariably, clients have prefaced their questions with praise for the overall campaign and presentation, and the questions are sincere attempts to have students elaborate on the rationale for their recommendations.

At the end of the day, the client huddles, then returns to the presentation room with the announcement of the winning team. The winning team gets a certificate of achievement from the department, and individuals (not just from the winning team), sometimes get job offers, but no guarantees are made. The sure outcome for students is a campaign book that they can point to proudly and show prospective employers who wonder what they did in school.

FACULTY PERSPECTIVE

This is a difficult, though rewarding course to teach. To teach the campaigns course, one must alternately be a teacher, coach, creative director, buddy, referee, completely unreasonable (from a student's perspective), big softy, cheerleader, courteous, brave, loyal, thrifty, etc. *ad infinitum*. Major agency experience seems to help, but is not necessary. Faculty who have conducted successful (winning) campaigns cite several common elements.

1. Work to deadlines
Establish specific due dates for each portion of the campaign, and require full presentation of them as they are due. That is, when the first section of the campaign, the situation analysis, is due, usually within the first two or three weeks of the semester, require the students to present it as well as turn in the hard copy.

2. Set Specific Deliverables
Using examples from previous campaigns, let students know early what the deliverables are and what will be required to produce them. The campaign book, for instance, may cost several dollars and seven or eight copies may be required for clients and faculty, as well as one copy for each student. Students should incur no more expense for this course than for buying a textbook for any other course. I usually suggest using a common word processing program such as Microsoft Word on a Macintosh platform (we have nearly 3,000 Macintoshes on our campus), and one or two of the students should be familiar with or learn a presentation program such as Persuasion for creating their slides.

TYPICAL SCHEDULE

Week 1
Form Agencies
Introduce Case

Week 2
Q&A with Client
Research begins

Week 3
Client Site Tour

Week 4
Situation Analysis

Week 5
Research completed

Week 6
Problems and Opportunities

Week 7
Marketing Objectives and Strategies

Week 8
Creative Strategy (Platform)

Week 9
Media Recommendations

Week 10
Sales Promotion

Week 11
Budget and Timeline

Week 12
Campaign Evaluation/Review

Week 13
Turn in Rough Draft of Campaign Book

Week 14
Prepare Final Presentation

Week 15
Final Book Due, Team Evaluations

Week 16
Presentation, Winner Announced

3. Form Agencies Quickly
On the first day of class, we distribute agency position preference sheets to all students. They can indicate the function they'd like to work in, four or five names of other students they'd like to work with, and names of students they'd prefer not to work with. We can normally accommodate the students who want to work together, and almost invariably separate those who don't want to work together. But we make no guarantees on positions. Each instructor differs on this, but my personal method is to assign the Account Executive position to the person who wants it and has the highest grade point average, although I've varied this when, to my knowledge, a student was the natural leader in a group. The critical positions are Account Executive, Research, Copy, Art, Sales Promotion, Production and Media. While I assign positions, I allow students to negotiate their own position within their agency, as long as each has an area of responsibility.

4. Quick, Easy Assignment
The agency's first assignment is to name itself and write an agency philosophy (research-based, creative-driven, integrated elements, etc.), and provide a one-paragraph biography of each agency member. This gets them working together quickly.

5. Quiz on Case
The second period I distribute the case, and the third period I quiz the entire class on its substance. This lets them know that each is responsible for contributing to the overall campaign, and not just a portion (the "I'm only doing the art" syndrome).

6. Original Research
Almost every client can benefit from at least one piece of primary research. Often, we apply all students to doing one research project. This saves time. They share the results and analyze them individually. The client gets one set of data and several interpretations of what the data mean. In addition, individual agencies often perform their own primary research, or do extensive secondary research that sets their situation analysis and determination of problems and opportunities apart from the others. Clients invariably appreciate this and give us strong positive feedback on this aspect of the campaign.

7. Conference Reports
I require conference reports from the account executive every week. A brief, one-page report on the week's meetings (this course requires at least weekly out-of-class meetings), not only tracks the progress of the

group, but helps document non-performance by individuals.

8. Firing Option
Individual non-performance, a perennial problem, is addressed with the firing option. To fire an individual, the account executive must document the areas of poor performance (missed meetings, missed deadlines, blown assignments), set a specific objective for the individual to meet to get the performance back in line (e.g., media prices on three magazines due Friday, on disk), and set the alternative—firing. This warning letter must be signed by at least half the agency members. If the individual fails to respond to the written warning, he or she is out of the agency and must see the instructor to complete the course. The individual may try to get on with another agency in the same class, but other agencies are not required to accept them, and rarely do. Usually, the fired student is required to complete the campaign book alone. This alternative is *usually* enough to dissuade those who want a free ride.

9. Agency Competition
If a class is divided into two agencies, two types of class meeting follow. The first is information giving, and the entire class attends. The second is a progress report/review by the instructor of each agency. In the second, we typically divide the class time so that only one agency is in the room at a time. Their ideas, they are learning, have value, and must be guarded. While some cross-talk invariably occurs, students quickly become protective of their creative themes and sales promotion ideas.

10. Grading
Grades are assigned to individuals, but based on the campaign and presentation the agency has produced. Again, individual instructors differ slightly here, but the methods are roughly similar to mine. I grade individually on the case knowledge quiz, give them feedback at each weekly presentation they make on their progress, and assign a mid-term grade to the first draft they turn in of the entire campaign. The final campaign book gets a grade and the presentation gets a grade. These are averaged for an overall agency grade. Then I assess individual contribution, based primarily on my knowledge of their work (who did the research, writing, art, presenting, production, etc.), and secondarily on their peer evaluation. The peer evaluation they do at the end of the course gives me usually confirming, sometimes surprising, but invariably valid input on the contribution of each team member.

11. Peer Review
At the end of the course, each student gets to assess the contribution of each other student in five areas: meeting attendance, cooperation, initiative, follow-through, and overall contribution. This is a delicate area. It is imperative that you inform students that they are not assigning grades to other students, but providing their opinion of the contribution of their group members. The teacher assigns grades using the peer evaluation as one of several sources. To ensure objectivity, the teacher must guarantee that each peer evaluation is confidential and will not be revealed to any other person. I rank order the peer review information, arriving at a consensus of each team member, and will let students know that, for instance, "your team said that, of ten members, only one person contributed less than you, and your contribution was rated significantly lower than the person above you in the rank order." This is usually enough to defuse student fear of arbitrary grading.

SUMMARY

Some students don't seem to remember the basics of the things you know they've been exposed to over the past few years in the department. So each time, I review fundamentals: how to write a crisp, quantifiable objective; how to write strategies and the tactics and executions that will meet the objective; how to write a creative strategy or platform that holds the entire campaign together; how to be sure the campaign is internally consistent as well as on-target.

Other students seem to forget all they've learned and want to rush right into clever promotions, cutesy headlines, and execution-based advertising without getting a founding in the situation analysis and marketing requirements of the case. By following the plan week by week, and requiring each person to demonstrate knowledge of the case, most of the confusion is avoided.

With all its frustrations, this is a rewarding course to teach. More than the formal graduation, presentation day is the rite of passage for our graduates. They're presenting their own work to a real-world client in competition with their peers. And invariably, as we stand in the back of the room and watch our fledglings leave the nest, we're amazed and not just a little bit proud.