# Campaign Proposal Assignment Packet

**425 Points Total**

Assign Campaign Proposal – Thursday, August 29

- Total length of project:  14 weeks

Milestone 1 – Skills Assessment Report – Thursday, September 5

- 20 points (Time allotted:  1 week)

Milestone 2 – Preliminary Interview Report – Thursday, September 19

- 35 points (Time allotted:  2 weeks)

Milestone 3 – Secondary Research Report – Thursday, October 3

- 50 points (Time allotted:  2 weeks)

Milestone 4 – Primary Research Plan – Thursday, October 24

- 40 points (Time allotted:  2 weeks, not including week of Fall Break)

Milestone 5 – Campaign Planning Report – Tuesday, November 5

- 30 points (Time allotted:  1 ½ weeks)

Milestone 6 – Campaign Tactics & Logistics Report – Tuesday, November 19

- 60 points (Time allotted:  2 weeks)

Milestone 7 – Proposed Evaluation Plan – Tuesday, November 26

- 10 points (Time allotted:  1 week)

Milestone 8 – Campaign Proposal – Thursday, December 5

- 100 points

Milestone 9 - Formal Presentation – Thursday, December 12

- 30 points

Milestone 10 - Individual Log and Final Reflection – Friday, December 13

- 50 points

***NOTE:*** *Beginning with Milestone 2, each milestone will ultimately become a section of the final campaign proposal.  To avoid the revision process becoming overwhelming at the end of the semester, revisions recommended by the instructor and/or the client must be made and submitted when turning in the next milestone.  For instance, changes to Milestone 2 will be made and submitted when turning in Milestone 3.  Both the original graded copy and the revised copy of the previous milestone should be included so comparisons between versions can be made efficiently.*

## Campaign Proposal Assignment Overview

The campaign proposal assignment is based on the ***competitive agency model***. Students will work in teams of four to five members per team and "compete against each other to develop campaign proposals in the same way that real-world agencies compete for the business of prospective clients" (Bobbitt & Sullivan, 2005, p. xv). Specifically, the class will be divided into three to four teams who will present competing campaign proposals to a single client.

To ensure a high quality final product for the client and for student portfolios, the semester-long project is broken up into smaller milestone assignments with corresponding deadlines. *Students will be allowed to form their own teams and should designate a team leader/liaison.*

1. Milestone 1 involves distributing a **Skills Assessment Worksheet** to each team member. After the worksheets are completed by all team members, the team will analyze their strengths and weaknesses and submit a **Skills Assessment Report**. Copies of the completed worksheets will also be typed, alphabetized by students' last names, and submitted for instructor and client review.

2. Each team will have the opportunity to interview one or more client contact(s). A **Preliminary Interview Guide** must be submitted and approved before the interview is conducted. Milestone 2 includes a **Preliminary Interview Report** consisting of a transcript of the notes taken during the interview and an analysis of the information gleaned from the interview.

3. Milestone 3 involves gathering relevant secondary research from sources including but not limited to the mass media and the Internet. Teams then submit a **Secondary Research Report** that highlights the relevant information gathered through background research.

4. Milestone 4 requires submission of the **Primary Research Plan.** The plan includes a preliminary list of audiences that the campaign will ultimately reach. It will also provide a list of research objectives and a description of how specific research methodologies could be employed during the primary research phase. The team will then develop at least one specific research instrument such as a questionnaire or focus group facilitation guide.

5. Based on primary and secondary research, the team is ready to develop Milestone 5, the **Campaign Planning Report.** This report includes proposed goals, objectives, messages, themes and strategies for the campaign.

6. Once the Campaign Planning Report is approved, the team will prepare Milestone 6, the **Campaign Tactics & Logistics Report.** This report includes proposed media and non-media tactics to accomplish the campaign's goals and objectives. To the extent possible, the team will include samples of proposed tactics (e.g., a draft news release, a sample event schedule, etc.). The logistics portion of the report includes proposed staffing, budgeting and scheduling information.

7. Milestone 7 is the **Proposed Evaluation Plan** and includes a copy of at least one instrument developed to support efforts to evaluate the effectiveness of the campaign.

8. Milestone 8 is the completed **Campaign Proposal** and should include revisions of all previous milestones as directed by the instructor and/or the client.

9. The project concludes with Milestone 9, a **Formal Presentation** to the client. Teams will submit professional copies of the proposal to both the instructor and the client and will develop a corresponding PowerPoint presentation that summarizes the proposal.

10. Each of the above milestones is considered a team effort. Thus, only one copy of each milestone is required.

    a. The <u>individual</u> portion of the assignment, Milestone 10, is to submit a detailed **Individual Log** of the hours invested in the project. The format for the log should include <u>two columns</u>: one for the date and time and one for a detailed description of the actions performed. *The total time should be calculated and appear at the end of the log.* The purpose of the log is to create individual accountability and to ensure an equitable division of labor among all team members.

    b. Each student will also submit an **Individual Final Reflection** that assists the student in processing the experience. The reflection should be two to three pages in length and includes responses to the following.

        - ***What lessons did you learn about developing a public relations campaign? Specifically, what did you learn about:***
            - Research and evaluation
            - Developing goals, objectives, strategies, and tactics
        - ***What did you learn about teamwork during the process? Specifically…***
            - What do you believe your team did effectively throughout the assignment?
            - What do you believe your team should have done differently?
            - What unique contribution did you bring to the campaign process?

# Skills Assessment Worksheet

| | |
|---|---|
| Name ______________________ | Classification ______________________ |
| Phone ______________________ | Email ______________________ |
| Major/Minor ______________________ | |
| Courses Completed Toward Major: | |
| Short- and Long-Term Career Goals: | |
| Strong Communication Skills: | Communication Skills to Improve: |

Rate your *abilities* in the following areas according to the following scale:
1=No experience, 2=A little experience, 3=Some experience, 4=A lot of experience

Rate your *interest level* in the following areas according to the following scale:
1=No interest, 2=A little interest, 3=Some interest, 4=A lot of interest

| | **Ability** | | | | **Interest** | | | |
|---|---|---|---|---|---|---|---|---|
| **Skill** | **1** | **2** | **3** | **4** | **1** | **2** | **3** | **4** |
| 1. *Planning and Programming* | | | | | | | | |
| a. Analyzing problems/opportunities | | | | | | | | |
| b. Defining goals and publics | | | | | | | | |
| c. Making recommendations/plans | | | | | | | | |
| 2. *Research and Evaluation* | | | | | | | | |
| a. Primary (surveys, focus groups) | | | | | | | | |
| b. Secondary (Internet, library) | | | | | | | | |
| *3. Writing and Editing* | | | | | | | | |
| a. Writing news releases | | | | | | | | |
| b. Writing scripts/speeches | | | | | | | | |
| c. Writing newsletters/brochures | | | | | | | | |
| 4. *Production* | | | | | | | | |
| a. Desktop publishing | | | | | | | | |
| b. TV/radio production | | | | | | | | |
| c. Web site design | | | | | | | | |
| 5. *Event Planning* | | | | | | | | |
| *6. Public Speaking* | | | | | | | | |
| 7. *Project Management* | | | | | | | | |
| a. Time management | | | | | | | | |
| b. Multitasking | | | | | | | | |
| c. Decision making | | | | | | | | |
| 8. *People Skills* | | | | | | | | |
| a. Networking | | | | | | | | |
| b. Active listening | | | | | | | | |

## Milestone 1 - Skills Assessment Report

Prepare an analysis of your team's strengths and weaknesses addressing the following questions. *Frame the analysis with a strong introduction and conclusion.*

- What skills is your team well prepared to demonstrate?
- In what areas does your team lack experience?
- As you consider each team member's worksheet and what you know about each other so far, what challenges is your team likely to encounter in terms of interpersonal and/or schedule conflicts?
- How do you intend to address areas of inexperience or potential problems?

*Group "constitution"/bylaws is worth up to 5 bonus points!*

## Preliminary Interview Guide

As your team prepares to interview a client contact, consider including in your interview guide some of the questions below. Although it may be longer, your interview guide should consist of <u>at least ten questions</u>.

- Give us an overview of your organization.
  (Probes—industry, mission, vision, values, culture, strategy, structure)
- Tell us a little about the history of your organization.
  What is your personal history with the organization?
- Tell us what you would like to accomplish through a public relations campaign.
- Who are the campaign's priority audiences? What information have you gathered about them already?
- What research, if any, do you have available that we could review?
  What would you hope to accomplish if original research were conducted?
- What communication strategies and tactics have you implemented in the past? In your opinion, how effective were these in reaching this campaign's priority audiences?
- What timeframe and budget figure do you have in mind for the campaign?
- How would you know the campaign was effective?

## Milestone 2 – Preliminary Interview Report

A *transcript* is simply a typed version of the notes taken during the interview. The transcript should list each question posed followed by the client's response. The analysis portion of the report should address the following questions framed with an introduction and conclusion.

- Based on the initial interview, what are possible campaign goals and objectives?
- According to the client, who are the target audiences for the campaign? What assumptions does the client make about these audiences?
- What messages/themes were suggested by the client interview?
- What ideas did the interview generate concerning sources of background research?

## Milestone 3 – Secondary Research Report

Different teams will be assigned to research various areas of background information. Sources might include mass media sources, library databases and Internet sources. Background information may include information about the client organization, its industry, peers/competitors, and its publics. Report your findings by responding to the following questions as you construct the background analysis.

- What findings help you better understand the client organization?
- What industry and peer/competitor information did you identify as potentially relevant to the campaign?
- What findings help you better understand the campaign's target audiences?
- What findings suggest areas for additional (primary) research?
- What findings, if any, may run counter to the client's perceptions?

Conclude the report with the situation analysis section and the statement of the core problem/opportunity as uncovered by the secondary research phase.

## Milestone 4 – Primary Research Plan

Based on the secondary research phase, develop a list of the campaign's priority audiences. For each audience, supply a brief description of who comprises that audience and your rationale for targeting them in the campaign.

Next, establish at least one research objective for each audience in the areas of awareness, attitude, and action. For example, if I wanted to learn more about an audience's awareness of my organization, I could create the following research objective: "To measure the degree to which X is aware of Y."

Finally, select at least one primary research method per audience and explain why you selected each method and how it will contribute to accomplishing your research objectives. One of your methods *must* be a focus group or a survey.

After obtaining approval for the proposed primary research objectives and methods, you then proceed to create the research instrument corresponding to at least one proposed method. For instance, develop a structured interview guide for one-on-one interviews or a facilitation guide for a focus group. If you opted for survey research, design the questionnaire. Be sure the questions you include clearly relate to accomplishing your research objectives.

The primary research plan contains the final version of the research instrument developed. The format for the research plan includes the following sections:

- **For each target audience -**
    - Description
    - Rationale
    - Current Relationship
    - Influentials
    - Self-Interests
    - Research Objective(s)
    - Research Method(s)
      (include details about sampling and data collection)
- Appendix(es) (include copies of research instrument(s) developed)

## Milestone 5 – Campaign Planning Report

With the primary research phase planned, you are now ready to develop the campaign's goals, objectives, messages, themes and strategies.

Your campaign should have one primary goal with multiple objectives that establish how the goal will be achieved. Include ***outcome objectives*** that address each of your target audiences and the desired changes in their awareness, attitudes and/or actions. Objectives should begin with an infinitive phrase (To + action verb) followed by the desired result, target audience, quantification and deadline.

For example, if the client were a hospital in a market with two other major competitors, the goal of the campaign could be "To become the community's preferred healthcare provider." Because research has revealed females ages 60 and over as a priority audience, outcome objectives to accomplish this goal could include:

- To achieve 80% top-of-mind awareness with females 60 and over in the primary service area by July 1, 2013.
- To increase the percentage of females 60 and over in the primary service area who prefer Hospital X to 50% by July 1, 2013.
- To improve reported inpatient last-visit share among females 60 and over in the primary service area to 25% by July 1, 2013.

Once you've created objectives, you are ready to identify the campaign's key messages and theme. Essentially, ***messages*** are the basic ideas you want target audiences to remember as a result of the campaign while ***themes*** are the overarching ideas that apply to all audiences. While your campaign may include several messages, you should focus on developing a single theme that encompasses these messages.

In our hospital example, let's say the organization wants to own the "best" position. In other words, top management believes and research supports the notion that if a hospital is considered the best healthcare alternative, it will also be the community's preferred provider. Thus, key messages for the campaign center around having the best medical staff, the best technology and the highest quality of care.

It may be helpful to think of a campaign's theme in terms of a "tagline" or slogan used throughout the campaign. Thus, this is a prime opportunity to apply creativity to the planning process and is especially critical in an integrated communications effort that employs advertising and marketing strategies as well. For instance, the theme for the hospital's "best" campaign could be "Medical Excellence Everyday."

A ***strategy*** is a statement of the communication vehicles (or channels) used to accomplish a specific objective. ***Tactics*** (which you will develop in Milestone 6) are the specific action plans for how to implement strategies.

There are multiple ways to categorize strategies, and the list included here moves from media to nonmedia channels. Strategy categories include media relations, institutional advertising, interactive media, special events, partnerships/sponsorships, internal communication, investor relations materials, marketing activities and in-person communication. You should rely on as many strategies as it takes to accomplish the campaign's objectives.

In the hospital example above, we have three objectives that move from awareness to preference to usage (knowledge→attitude→behavior). Thus, we want females 60 and over to remember and believe Hospital X's claim to be the community's best healthcare provider so they will choose Hospital X for their next inpatient hospitalization. We might develop the following strategies.

- Position Hospital X's physicians as experts in the news media on health issues relevant to females 60 and over.

- Partner with other organizations focused on seniors to sponsor educational events featuring Hospital X's physician specialties and technology advances relevant to females 60 and over.

The format for the campaign planning report includes the following sections:

- Campaign Goal
- Campaign Theme
- By Target Audience:
    - Objectives
    - Campaign Messages
- Strategy Categories
    - Mass Media Strategies
    - Digital Media Strategies
    - Direct Strategies

## Milestone 6 – Campaign Tactics & Logistics Report

Once objectives and strategies are formulated, the Campaign Tactics & Logistics Report is essentially an action plan for implementing the campaign. For each tactic included in the plan, explain how the tactic contributes to accomplishing a campaign objective. For each tactic, provide a brief description that specifies what is essential for the tactic to be implemented. *Tactics begin with action verbs and are stated as commands*.

Your plan should include both media and nonmedia tactics with a minimum of 10 individual tactics. One of your media tactics must include a news release, and one of your non-media tactics must involve an event or sponsorship. Where practical, include samples of proposed tactics (e.g., a draft of a news release or an event schedule).

For instance, to implement the strategy of positioning Hospital X physicians as experts in the media, one media tactic is to "Develop a referral service publication that lists physician specialties related to senior female health concerns and distribute it to local media." A non-media tactic to implement the strategy of cosponsoring educational events is to "Develop a public seminar on orthopedic treatment options and partner with an orthopedic clinic that specializes in diagnosing and treating seniors."

The logistics portion of the report will include three sections that further detail how the campaign will be implemented.

First, **Staffing** will include a description of all team members with brief biographies listing each person's credentials, experience, and campaign responsibilities. Including head shots of each team member is optional.

Second, the **Budget** section will focus on program and production costs, including estimates for designing and producing communications materials and planning and producing events. These estimates should be based on the campaign schedule (see below).

Third, the **Schedule** should include a chronological listing of campaign highlights and be supported with either a calendar or timeline (e.g., a Gantt chart).

## Milestone 7 – Proposed Evaluation Plan

Your evaluation plan *must* include summative evaluation methods. The plan should include at least one evaluation method per target audience. Like the primary research plan, explain why you selected each method and how it will assess the campaign's effectiveness in reaching its objectives. Create the research instrument corresponding to at least one of the proposed methods.

In the hospital example, the evaluation criteria are implied by the objectives. Since the campaign objectives established 80% top-of-mind awareness, 50% preference, and 25% inpatient hospitalization for females 60 and over, it is clear that a pretest/posttest study is necessary to measure success. Thus, if I developed a telephone questionnaire during the primary research phase (i.e., a benchmarking study), I would propose a follow-up tracking study at the end of the campaign that is also implemented as a telephone questionnaire.

## Milestone 8 – Campaign Proposal

The Campaign Proposal is the culmination of all previous milestones. You will compile all the sections of the plan into a comprehensive written proposal. You will ultimately submit three copies, attractive in design and professionally bound. Be sure to make copies for each team member because the submitted copies will not be returned.

The final proposal adds three elements: a title page, a table of contents and an executive summary. The **Title Page** includes the name of the proposal, the client, and the team agency, along with the submission date. The **Table of Contents** lists each section of the report with the corresponding page number where the section begins.

The **Executive Summary** follows the Table of Contents and is a two- to three-page overview of the entire campaign proposal. It defines the problem or opportunity that prompted the proposal and provides a brief synopsis of the research results. It lists the campaign goal and objectives and previews the campaign theme and strategies. Finally, it lists the methods proposed to evaluate the campaign's effectiveness.

The proposal should also include the following section headings: Background Research; Primary Research Plan; Goal and Objectives; Messages, Theme(s), and Strategies; Tactics and Logistics; and Evaluation Plan. Supporting documents (e.g., research instruments, copies of communication tactics), should appear as appendixes (labeled as Appendix A, Appendix B, etc.).

# Campaign Proposal Evaluation Worksheet

**Content**

*The final report contains the following:*

- Title Page
- Table of Contents
- Executive Summary
- Background Research
- Primary Research Plan
- Goal and Theme
- Objectives and Messages
- Strategies
- Tactics and Logistics
- Evaluation Plan
- Appendixes

Notes on Content

**Style**

- Report is written in a professional tone following AP guidelines with correct grammar, spelling, etc.
- Report is professional in appearance and free of typos

Notes on Style

**Total ______ out of 100**

## Proposal Presentation Evaluation Worksheet

**Content**

*Final presentation includes the following sections:*

- Background Research
- Primary Research Plan
- Goal and Theme
- Objectives and Messages
- Tactics and Logistics
- Evaluation Plan

Notes on Content

**Delivery**

*Final presentation demonstrates the following:*

- Appropriate and attention-gaining introduction
- Cohesiveness and smooth flow between speakers
- Professionalism evidenced by prepared and polished speakers and extemporaneous delivery
- Verbal proficiency—volume, rate, tone, free from vocal interferences, appropriate language, etc.
- Nonverbal proficiency—appearance, eye contact, facial expressions, gestures, etc.
- Professional PowerPoint presentation that complements oral delivery
- Compliance with predetermined time limit

Notes on Delivery

**Total _____ out of 30**