

For Publication

**IABC Accreditation Council**

# **Portfolio Submission Guidelines**

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**IABC** INTERNATIONAL ASSOCIATION  
OF BUSINESS COMMUNICATORS

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ACCREDITATION COUNCIL

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## \* Description of Portfolio

Welcome to the portfolio step in the accreditation process. The portfolio you submit is a vital part of the accreditation process. It qualifies you to proceed with accreditation and show your readiness to take the exam. The portfolio provides you the opportunity to demonstrate strategic thinking in each step of the strategic communication planning process as you summarize the work plan for your project/program.

The portfolio requirements are designed to give all candidates an equal opportunity to showcase their management and strategic communication planning skills as a communicator, regardless of their individual areas of expertise or any external or job-related advantages or limitations. The portfolio measures what you have done and, most importantly, the reasons for your actions.

You should display your professional abilities in the best possible light. Select projects of your best strategic work. In particular, highlight your strategic alignment summary under the goals/objectives and results headings. This enables the reviewers to evaluate your ability to think strategically so work to make this section especially clear and concise. In addition, your portfolio not only reflects what you have done but also gives you an opportunity to answer the question, "What, if anything, would I do differently if I could do the project all over again?" A summary of this is best when placed under the measurement/evaluation of outcomes heading. This enables reviewers to understand what you and your organization have learned from this project/plan to enhance future communication activities.

We strongly encourage you to ask an ABC colleague or accreditation program facilitator to be your mentor/coach as they can provide insight into your statement of objectives and your choices of work projects to showcase. A mentor/coach can be found through your local/regional IABC group or by contacting [recognition@iabc.com](mailto:recognition@iabc.com).

The portfolio itself is comprised of the work plan summary and the work samples. The work plan summary describes the program from initial awareness of the communication need through planning and evaluation. A format for the work plan can be found in the "Guidelines for Writing Your Work Plan" section. The work sample provides supporting documentation of your communication activities and may include e-files of photos of your displays, brochure, media releases, websites, timelines, project management spreadsheets, etc. Your e-file submission serves as documentation of your work. Read the "Preparing Your Work Samples" section to learn more. Please identify on your submission "confidential" work that should be destroyed upon evaluation of the portfolio.

You are required to submit two work plans of your best project/program as an organizational communicator. These two plans become your portfolio. Categories for projects/programs can be found in the Categories for Communication Work Plan section. These categories highlight possible projects/programs you may have done and can use for the portfolio submission. There is no timeframe within which work included in the portfolio must have been completed; however, it is recommended that you use a program/project that was implemented within the last five years as a guideline. Keep in mind that you will need to submit electronic samples (PDF files) of the work/collateral to support your work plan. Your samples should represent a broad range of communication activities associated with your project.

If your portfolio does not receive a qualifying score, a member of the Accreditation Council will give you a detailed explanation of the reasons why your portfolio needs more work and help you discover what you need to do in order to make it a qualifying portfolio. You have one year to re-work your portfolio, incorporating suggested changes. Your portfolio must receive a qualifying score before you will be eligible to take the accreditation exam.

## \* Categories of Communication Management Work Plan

Projects, programs and campaigns that are guided by a communication strategy should be used for your work plan. Projects, programs and campaigns can be from any type of organization, from governments and retail companies to services such as utilities and health care. Your work plan should demonstrate how your project applied a full range of planning and management skills, including research, analysis, strategy, tactical implementation and evaluation. Portfolio work samples that support your work plan may include a combination of communication materials and should reinforce how the sample provided the support.

### **Category 1: GOVERNMENT RELATIONS**

Programs targeted at government bodies and government agencies.

### **Category 2: COMMUNITY RELATIONS**

Programs targeted at community audiences, including nonprofit and volunteer organizations.

### **Category 3: CUSTOMER RELATIONS**

Programs targeted at customer audiences, including customer relationship management and customer research.

### **Category 4: INTERNATIONAL COMMUNICATION**

Programs targeted at international audiences, including multinational consumers and international organizations, as well as programs undertaken by multinational bodies (such as the European Union or MERCOSUR).

### **Category 5: MEDIA RELATIONS**

Programs that used the news media as the main channel for reaching target audiences.

### **Category 6: MULTI-AUDIENCE COMMUNICATION**

Programs targeted at more than one internal and/or external audience.

### **Category 7: MARKETING COMMUNICATION**

Programs aimed at marketing products and/or services to an external audience.

### **Category 8: ISSUES MANAGEMENT AND CRISIS COMMUNICATION**

Programs targeted at external and/or internal audiences that address trends, issues and/or

attitudes that have a significant impact on an organization, such as labor relations, crises, mergers, acquisitions, public policy or environmental concerns.

**Category 9: EMPLOYEE/MEMBER COMMUNICATION**

Programs targeted at employee or member audiences. This category includes programs that create awareness and influence opinion or behavioral change, and those focused on management communication, ethics, morale, internal culture or change management.

**Category 10: HUMAN RESOURCES AND BENEFITS COMMUNICATION**

Programs targeted at employee or member audiences that deal with health and welfare, savings and pension, stocks and compensation, or recruitment and retention.

**Category 11: STRATEGIC COMMUNICATION PROCESSES**

This category is for programs that develop new strategic approaches to communication within an organization. They may include brand and culture audits, strategic messaging, employee and market research, competitive benchmarking and audience analysis. This category also includes training programs that enhance communication within an organization or among key audiences.

**Category 12: BRAND COMMUNICATION**

This category includes strategies for new brands and for repositioning existing brands. Winners in this category demonstrate the research used to shape brand changes. Programs include brand architectures, changes to corporate identities and design solutions that address the challenges of brand communication.

**Category 13: SPECIAL EVENTS: INTERNAL OR EXTERNAL**

This category includes any event that marks a significant occasion that supports the goals of an organization. For example, an anniversary, official opening, product launch, road show, conference, customer event or employee appreciation event would be eligible.

**Category 14: SOCIAL RESPONSIBILITY**

Programs targeted at communities, governments or funding agencies. Programs in this category address sustainable development or other economic, social or environmental issues. They include international aid, public awareness, corporate social responsibility, economic revitalization, cultural preservation, education, literacy, health, poverty reduction, employment, and indigenous and heritage protection programs.

Portfolios in this category may also include programs that feature educational entertainment. Such programs inform and persuade an audience to make significant behavior changes through entertainment programs, such as soap opera, sit-com (situation comedy), or stand-alone drama (i.e. miniseries). The format is used in places where a single medium (radio or television) may be the only way to reach a large population and where dramatic changes in behavior and lifestyle are needed to combat major societal problems like gender discrimination or sexually transmitted diseases.

#### **Category 15: MULTILINGUAL COMMUNICATION**

Programs targeted at bilingual and/or multilingual audiences, including non-native language speakers.

#### **Category 16: ELECTRONIC AND DIGITAL COMMUNICATION**

These programs are computer-based communication projects produced for internal or external audiences that primarily use electronic production and/or delivery tools. These tools include electronic newsletters, electronic annual reports, web sites and intranet sites. This category includes predominantly one-way electronic communication: published content that audiences access online. Please consider carefully whether your program fits this category or Category 17, Social Media.

#### **Category 17: SOCIAL MEDIA**

These programs encompass a quickly evolving range of new tools and practices that enable individuals and groups to collaborate and share knowledge and experiences online. These tools and practices intend to engage a public (whether internal or external) in conversation, as opposed to broadcasting information in one direction. The tools and techniques currently available include (but are not limited to):

- Conversation-enabled publishing platforms (blogs, podcasts, etc.)
- Social networks (LinkedIn, Facebook, MySpace, Dopplr, etc.)
- Democratized content networks (Digg, wikis, message boards, etc.)
- Presence networks/microblogging (Twitter, Jaiku, Pownce, etc.)
- Content sharing sites (YouTube, Flickr, Del.icio.us, etc.)
- Virtual networking platforms (Second Life, There.com, etc.)

## \* GUIDELINES FOR WRITING YOUR WORK PLAN

Think of your work plan as an executive summary of your communication strategy. The work plan describes your project's communication program, how it was developed and what you intended to achieve. View examples of work plans online at [www.iabc.com/abc](http://www.iabc.com/abc).

### **Specifications for Portfolios:**

As a guideline, work plans should be between **four (4) pages and six (6) pages** and should, clearly and concisely, summarize each step in the strategic communication plan for submission. Information such as timelines, organizational charts, flow diagrams, project management spreadsheets, other matrixes and additional plan information not directly related to the strategic communication plan summary can be submitted in a **two-page addendum**.

Portfolio submissions must be typed. The minimum font size is 10-point on 8.5 by 11-inch paper (A4 size outside the Americas, or 21 by 29.7 centimeters).

Use single column (paragraph) format, with no less than half-inch margins (1.3 centimeters) on all sides.

Portfolios should be written in the third person. It should not include words such as I, my, your, we, me etc.

### **How to label your work plan:**

List the following information at the top of your 4-page work plan and not on a separate page:

1. **Candidate's name:** The candidate *must* be the person who was principally responsible for the development, management and execution of the project.
2. **Organization candidate did work for:** Name of the organization the project affected
3. **Client organization or outside agency (if applicable):** If the work you are submitting was not done for your organization, include the name of the organization for which the project was designed. If you are no longer affiliated with the organization the project was designed for, or are an outside supplier (e.g., an agency or freelancer), you must include the organization's written approval of the project on their company letterhead/email signature along with your portfolio submission.
4. **Title of portfolio:** Choose a name that clearly describes your portfolio program.
5. **Category:** List the communication area – communication management or communication skills -- and category name (e.g., Category 17, Social Media) for your portfolio.
6. **Time period of project:** Specify when the communication project took place.

7. **Brief description:** Provide a one- or two-sentence description of your project.

### **Work Plan Format:**

Work plans should use the following format (including these headings):

#### **1. Project Summary**

This is where you briefly describe your organization's business or function, history, location, size, number of employees, annual budget. Include any other directly relevant information that will help the portfolio graders review your work in context.

Also, briefly describe the communication function in your organization, including overall objective, history, number of employees, annual budget and your role in the organization when the project was executed.

Finally, what clearly state the need or opportunity your communication project intended to address? There must have been a clear and definite business need for your project. Clearly describe the issues the organization faced, and outline any impact these issues had on performance, reputation, image, profits, participation, etc. Highlight any formal or informal research findings that support your analysis of the need or opportunity.

#### **2. Intended Audience(s)**

Identify your primary audience and any other audiences. Outline the audiences in terms of size, location, opinions and other characteristics. What was the audience's state of mind? What key audience characteristics did you take into account when developing your solution? Consider psychographic as well as demographic characteristics. Describe any research you did on your audience. If you did not conduct research, discuss how the need/opportunity was recognized.

#### **3. Goals and Objectives**

Goals describe what your communication project was designed to accomplish; what outcomes you were seeking from your target audiences. Choose one or two key goals to describe in detail. These goals should be aligned with your organization's strategic needs. Objectives are those steps you took to accomplish your goals. These should be realistic and measurable, and should examine desired outputs (such as number of media releases), outtakes (such as how you wanted the audience to perceive the message) and outcomes (such as metrics that pertain to issues such as, quality, time, cost, revenue percentage increase/decrease, market share or other criteria). Outcome measures are often financial, but not always. If your measurements are not financial, be sure to note this in your description. Also, please note whether you set these objectives and/or constraints, or were they imposed by other persons or outside circumstances?

#### **4. Solution overview.**

Outline your project's solution and the logic that supported it. Tell us why you did what you did. The solution should demonstrate your thought process, imagination and approach to problem solving. Describe your overall approach in dealing with management and how you sold the plan to them. If the plan was brought to you or your communication organization by management, describe in detail how you worked with them to structure the project or to sell necessary changes to the original plan. This may include explaining how you took management's original plan, which wasn't quite up to standard, and expanded it to maximize resources. Discuss how you involved stakeholders in developing the solution. Identify key messages. Present the tactics and communication vehicles you used.

#### **5. Implementation and Challenges**

Describe in detail how the work was carried out. (If you created a communication implementation plan, you can include that in the addendum rather than detailing in this section.) What was your role in the project? State your project budget. It does not matter if the budget was small or large. Show that you made efficient use of money. Discuss time frames. Describe any limitations or challenges that you faced when communicating and implementing the program/project. (Graders are looking for flexibility and a capacity to resolve problems and negotiate solutions as you monitored your plan.) Note any special circumstances and discuss how these were incorporated into the process.

#### **6. Measurement/evaluation of Outcomes**

How did you measure/evaluate your project's results? Every result should be linked to one or more of the objectives outlined in section 3. Results must be substantiated through quantitative or qualitative data. Measurement should demonstrate outputs, outtakes and outcomes. Cite formal and informal evaluations and any indications that the effort was effective in meeting its objectives.

For example, if your media relations campaign was designed to support a product roll-out, you should measure bottom-line figures about sales targets or the number of qualified sales leads, rather than just measuring the number of clips and impressions or advertising value equivalent.

If your challenge was to improve employees' understanding of an issue, you must show that their knowledge increased as a result of the communication plan you implemented preferably through a survey or some other research tool.

Include your own evaluation of the project, program or campaign, knowing what you know now. Were your objectives appropriate? Was the budget adequate? Was the timing correct? Was the audience targeted correctly? Was the communication channel choice effective? What would you do differently, knowing what you do today, and why?

## \* PREPARING YOUR WORK SAMPLE

The work sample is the supporting material that illustrates your communication program and provides the evidentiary support for your work plan. It can include videoclips, publications, design work, writing samples, photography, computer programs, etc. You may also include products such as scripts, an executive summary of the research results, the media buy, etc. Your work sample should represent the scope of your work.

The work sample should be electronic with files submitted as PDFs, and is the supporting evidence of your communication project—for example, a newsletter, podcast or web site. Please submit the highest-quality samples you can.

**Important:** If the work was completed on behalf of a client, **include a written letter of permission from the client** on their letterhead/email acknowledging your role and their consent for you to submit this portfolio.

### **A word about the size of your portfolio**

Organize and condense your work to provide a representative overview of your project. Be conscientious of file size for electronic delivery. Use tabs to separate and label the different sections of your portfolio (i.e. work plan, work sample) and be sure all sections are clearly identified.

### **Technical specifications:**

- **Electronic/digital elements.** Electronic and interactive work samples should be viewable on Windows or Macintosh equipment and/or software.
- **For web sites,** provide the URL or IP address of the site in your portfolio.
- **For intranets or “limited, secured access” sites,** provide instructions on how to register for the site, along with an account name or password. If access may be a barrier to evaluation, or if there's a chance the site may change after submission, consider submitting a "Tour of Work Sample Video" (of five minutes or less) or screen shots

### **Sample Suggestions**

- **Displays, billboards, sculptures, etc.** - Send color photographs, no larger than 8 by 10 inches, or 20.3 by 25.4 centimeters.
- **Publications** - Send a link to publication archive if at all possible. If PDFs must be made, send sample of publication's pages rather than the complete publication. For periodicals, we suggest that candidates submit three consecutive issues as a single sample (for both

printed and electronic versions). For semi-annual publications, submit both issues. For annual publications, including annual reports, submit one issue. Indicate the frequency of the publication (monthly, quarterly, semi-annual, etc.) in your work plan. Publication formats are defined as follows:

- **Magazines:** printed on coated or glossy paper, generally 8.5 by 11 inches (A4 outside the Americas, or 21 by 29.7 centimeters), saddle-stitched or perfect bound.
  - **Newspapers:** printed on newsprint, approximately 16 by 23 inches (40.6 by 58.4 centimeters).
  - **Magapapers/tabloids:** printed on coated or high-quality paper, generally 12 by 14 inches (30.5 by 35.6 centimeters) or larger.
  - **Newsletters :** printed on newsprint or glossy paper, smaller in size than newspapers or magapapers, generally four to eight pages on 8.5 by 11-inch paper (A4 outside the Americas, or 21 by 29.7 centimeters).
- **Programs and campaigns** - Submit a complete, concise sample that illustrates the entire campaign. To do this, enclose representative samples of multiple program elements. Submit color photographs (no larger than 8 by 10 inches, or 20.3 by 25.4 centimeters) of large or bulky samples.
  - **Writing samples** - Provide evidence of where the sample appeared. For recurring features or columns (Category 21), send three different instances as a single sample. For scripts (Category 21), submit typed entries.
  - **Videotapes** – Provide link to video tape.

### **Be selective with your work sample**

For larger communication programs, pick those examples (clips, photos, etc.) that best represent your program/project, rather than sending every item. For example, don't send a T-shirt—send a picture of a crowd of people wearing it. As a final check, ask yourself:

1. If you were a member of the target audience, would the work sample capture your attention?
2. Is it relevant, meaningful and memorable?
3. Does your work sample portray the solution as described in the work plan?