Social marketing planning process

What should a good social marketing program have

- Be based on behavioral theories and models (it has been shown that programs that are based on behavioral theories and models are more effective)
- Can be evaluated!!! (i.e. clearly set goals and processes)
  - Can give information about which parts of the program work and which don't
  - Return on investment, value for money
  - Impact on behavior, beliefs, attitudes and/or knowledge

- **The laziest thing people do is go right to tactics. You have to start with <u>what you are trying to get done, who can get it done for you, what you have to tell them, and who has to tell them to persuade them</u>. (Fenton Communications, 2001 in French and Gordon 2015)**

Common weaknesses of social marketing programs

- Using top-down approaches (constructed by experts and policy planners without consumer insight – thus often misunderstood or seen as irrelevant)
- Short-term or constantly reviewed programs
- Focused on tactical solution (message development, media buying, new product development, new media interventions) – fail to meet the audience needs and address causal agents
- Poor management, lack of coordination and integration among different programs.
- Unrealistic or unmeasurable goals
- Insufficient funding to reach the goals

(French and Gordon 2015)

A successful social intervention planning principles

- Long-term strategic approach
- Based on a deep understanding of the causes of problems and how people view the issue
- SMART program objectives
- Targeting particular audience's needs!
- Addressing causal factors as well as reactions to them
- Evaluation of the program's successes and failures

(French and Gordon 2015)

Questions to be answered
(Medical Research Council's guide, 2010)

- Are you clear about what you are trying to do, what outcome you are aiming for, and how you will bring about change?
- Does your intervention have a coherent theoretical basis?
- Have you used this theory systematically to develop the intervention?
- Can you describe the intervention fully, so that it can be implemented properly for the purposes of your evaluation, and replicated by others?
- Does the existing evidence, ideally collated in a systematic review, suggest that it is likely to be effective or cost effective?
- Can it be implemented in a research setting, and is it likely to be widely implementable if the results are favourable?

- **If one of the questions is not answered, more preparation is needed**

Social marketing planning models

- There are a number of social marketing operational planning models
- Can be adapted to the needs of a particular project

- The planning models set out a number of steps that proceed from analysis through development and into implementation and evaluation.
- The various planning models have advantages and disadvantages.
- Some are very simple and easy to apply, others are more comprehensive and require more effort.

(French and Gordon 2015)

The Total Process Planning Model (TPP)

- One of the most used
- Scoping the issue, developing potential interventions, testing them, implementing the program, evaluating it and following up (input for the next delivery)

Scope → Develop → Implement → Evaluate → Follow up

French and Blair-Stevens, 2008
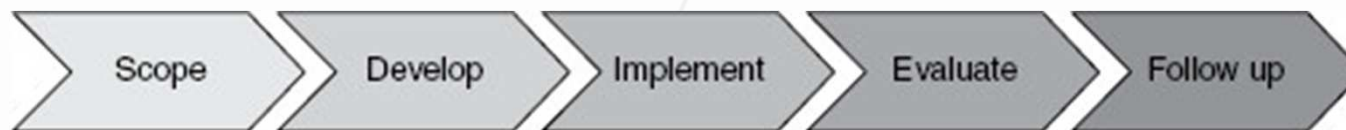
The CDCynergy social marketing planning tool

Phase one: Describe the problem

Phase two: Conduct market research

Phase three: Create a marketing strategy

Phase four: Plan the intervention

Phase five: Plan the programme and evaluation

Phase six: Implement the intervention and evaluate

CDC, 2005

Kotler and Lee's (2016) ten-step model

- Describe the social issue, background, purpose and focus
- Conduct a situation analysis
- Select target audiences
- Set behavior objectives and target goals
- Identify target audience barriers, benefits and motivators; the competition; the Influential others
- Develop a positioning statement
- Develop a strategic marketing mix
- Develop a plan for monitoring and evaluation
- Establish budgets and find funding sources
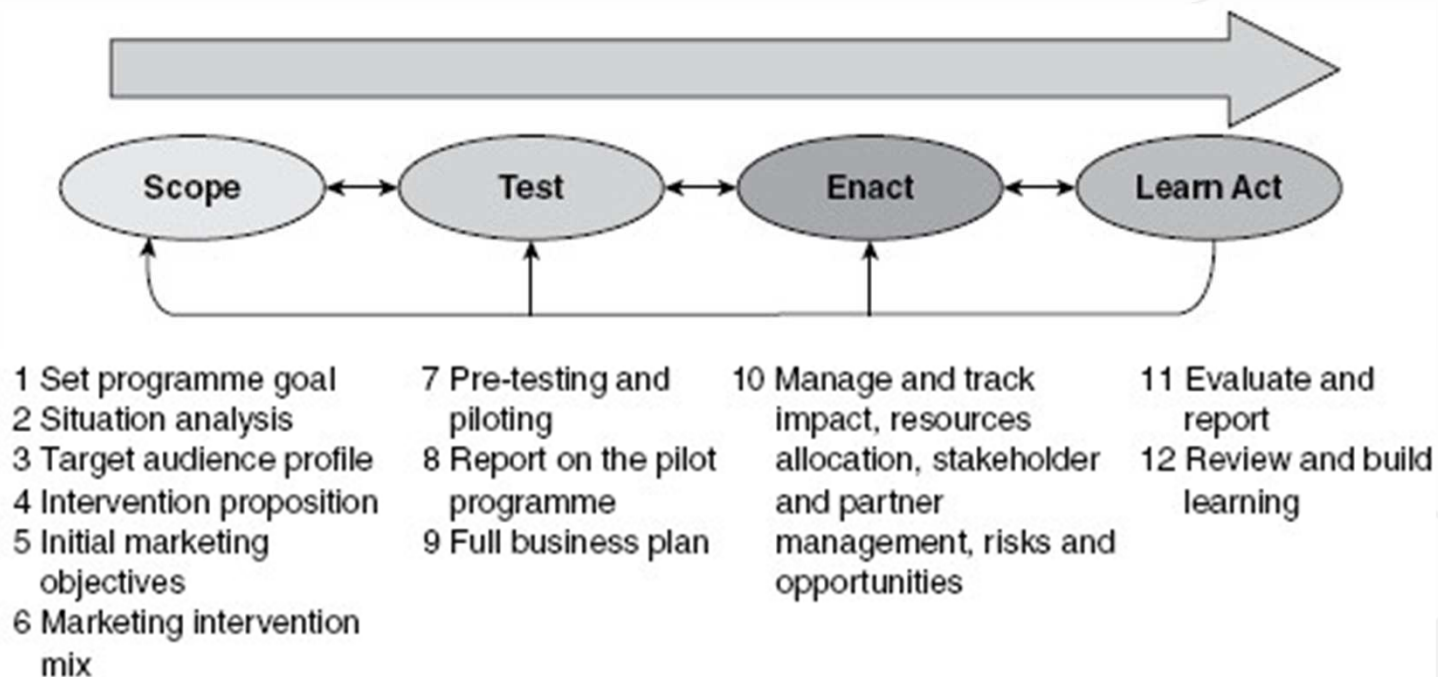- Complete an implementation plan

Lee and Kotler (2016)

Kotler and Lee's (2016) ten-step model

Figure 2.5 Summary of Marketing Planning Steps and Research Input

Kotler & Lee, 2008: 45

Social Marketing Fall 2011

The STELa social marketing planning tool

1 Set programme goal
2 Situation analysis
3 Target audience profile
4 Intervention proposition
5 Initial marketing objectives
6 Marketing intervention mix

7 Pre-testing and piloting
8 Report on the pilot programme
9 Full business plan

10 Manage and track impact, resources allocation, stakeholder and partner management, risks and opportunities

11 Evaluate and report
12 Review and build learning

French 2010

What we will focus on

French 2010

The importance of the scoping stage

- It helps to avoid a tendency to start generating and crafting solutions before a deep understanding and insight into the customer are achieved

- It ensures that a clear behavioral focus is identified from the start

- Ensures that relevant theory and ethical issues are considered

Scope

1 Set programme goal
2 Situation analysis
3 Target audience profile
4 Intervention proposition
5 Initial marketing objectives
6 Marketing intervention mix

French and Gordon 2015

Advantages of investing in the scoping stage

- Ensuring that subsequent resources and time invested in addressing the challenge(s) can be used to the greatest potential effect

- Way to engage and mobilize key partners and stakeholders

- Providing important <u>baseline understanding and insights</u> on which all subsequent work can be based.

- Helping to grow the evidence base by setting out a clear hypothesis and objectives that can be <u>tested, evaluated, and reported on</u>.

French and Gordon 2015

Scoping, task 1: Set program rationale and goal

- why action is needed on the identified social issue,
- What is the target audience
- why they have been selected.
- Why is there need for action,
- What is the relevant policy and organisational context
- What should be the overall strategic objectives of the intervention

French and Gordon 2015

Step 1: Describe the Social Issue, Background, Purpose and Focus

- Social Issue (The Wicked Problem)

- Background: Facts & Information

- Purpose: What is the potential impact of a successful campaign.
  - Usually to "Decrease, Reduce, Improve, Increase, Eliminate" something (e.g., Improve Water Quality)

- Focus: Potential approaches to contribute to the plan's purpose

Figure 2.5 Summary of Marketing Planning Steps and Research Input
Kotler & Lee, 2008: 45

Kotler and Lee (2008)

Describing the problem and its background

- What is the specific wicked problem? (public health problem, safety concern, environmental threat, community need)

- Substantiate and quantify the problem
    - How bad is it?
    - What is contributing to the problem? What makes it worse?
    - Who is affected by the problem?
    - How do you know? (data - epidemiological, scientific, other research data from credible sources)

- What organizations have been dealing with this problem and how?

- Based on this: What is the potential impact of your plan? What difference will it make? (these are not objectives/goals, which must be measurable, but is the explanation of the plan's purpose)

Lee and Kotler 2016, French and Gordon 2015

Where do we get the information

- Czech statistical office (https://www.czso.cz/)
- Eurostat
- CVVM- public opinion research center (https://cvvm.soc.cas.cz/en/)
- News (attention to source credibility)
- Specific organizations (attention to source credibility)
- Scientific literature (scholar.google.com)
- Thesis (attention to quality)

- Snowballing the sources

Scoping, task 2: Situation analysis (1/2)

- SWOT (strengths, weaknesses, opportunities and threats) and PESTLE (Political, Environmental, Social, Technological, Legal, Economic) analysis.

- Competition analysis and force field analysis:
  - list and assign the relevant weighting to factors influencing adoption of the behavior including positive enabling factors and barriers to change;
  - analyze what or who may be influencing the target audience to act in a way that is detrimental or positive and assess the relevant weight of the influence.

French and Gordon 2015

Scoping, task 2: Situation analysis (2/2)

- Evidence and data reviews: what is known from published and unpublished sources (professional journals, case study reports, interviews with others who have undertaken work in the field) about:
  - the causes
  - how to tackle the issue

- Asset mapping: the recording of all assets that could be used to tackle the problem, including:
  - social networks,
  - community assets,
  - environmental assets,
  - stakeholder assets.

French and Gordon 2015

Scoping, task 3: Target audience profile and segmentation (1/2)

- Describe the primary audience (i.e. the people you are seeking to influence).
- Describe the secondary and tertiary audiences (i.e. the people who are influencing or could influence the primary audience, e.g. parents).
- Data analysis
  - service uptake data,
  - demographics,
  - geographic data,
  - relevant behavioural data (including risk taking and protective behaviours).

French and Gordon 2015

Scoping, task 3: Target audience profile and segmentation (2/2)

- Target audience insight and understanding - from qualitative and quantitative target audience research such as surveys, focus groups and observational studies.

- Development of target segmentation model
  - Clustering people based on factors such as understanding, attitudes, beliefs, behavious and risk.

French and Gordon 2015, Lee and Kotler 2016

Scoping, task 4: Intervention proposition

- Describing the social marketing exchange based on target audience insight
- Positioning: how will be positioned with the target audience.
- Positive behaviour change (e.g. recycling): how the benefits will be maximised and costs reduced for the target audience
- Problematic behaviour (e.g. driving too fast): how the costs will be maximised and the benefits reduced.
- non-rational choice situations: how the choice environment will be structured, or what policy or service transformation will be introduced.

- List the 'forms' and 'types' of intervention that will be applied and the rationale for their selection.

- Set out the level of funding that will be required to deliver the proposed intervention objectives and over what time-frame.

French and Gordon 2015, Lee and Kotler 2016

Scoping, task 5: initial social marketing objectives

- Set out:
  - cognitive objectives (measuring knowledge)
  - affective objectives (beliefs and attitudes)
  - behavioral objectives

- All objectives should be SMART: specific, measurable, achievable, relevant, time bound.

French and Gordon 2015, Lee and Kotler 2016

Scoping, task 6: Marketing intervention mix strategy (1/2)

- Which combination of the intervention forms will be used –
  - 1 Inform,
  - 2 Educate,
  - 3 Support,
  - 4 Control,
  - 5 Design

- How will the desired behaviour be positioned with the target audience so that they perceive it to be of value, plausible and sustainable.

French and Gordon 2015

Scoping, task 6: Marketing intervention mix strategy (2/2)

- Design the product,
- What is the system, environment or services offered to assist adoption of the desired behaviour.
- What is the price or cost that will be associated with adopting the behaviour and how this will be reduced.
- how to promote the desired behaviour
  - the language to 'frame' the offer,
  - the channels of communication
  - the 'voice' and 'face' of the promotion

French and Gordon 2015, Lee and Kotler 2016

Stage 2: testing and development of the intervention (1/2)

- Task 7 Pre-testing and piloting
  - which potential interventions to test and how to test them.
  - budget and a timetable for the pilot phase.

- Task 8 Reporting on the impact of the pilot programme
  - Report on the immediate effect of the intervention on issues such as knowledge gain, attitude and beliefs.
  - Measure the impact on short-term behaviours and systems efficiency such as the cost of generating interest in the programme and the costs of different methods of generating contact with the intervention or short-term behavioural action.

French and Gordon 2015

Stage 2: testing and development of the intervention (2/2)

- Task 9 Full social marketing implementation plan
  - Define:
    - audience segmentation
    - SMART behavioural objectives for the programme and how these will be measured.
    - Anticipated impact and outcomes for the selected target audiences over a designated time-frame.
    - intervention mix and how it will be coordinated and managed
    - Budget
    - plan for stakeholder and partner engagement.
    - how the programme will be managed and its governance arrangements.
    - project process milestones, e.g. when will the launch take place and when will the first review take place?

French and Gordon 2015

Stage 3: Enact

- Task 10 Manage the implementation
  - Manage and track the impact of the staff support and development plan.
  - Manage and track the impact of the stakeholder and partner management plan.
  - Review and manage risks associated with the project.
  - Track and manage the intervention budget
  - opportunity spotting, horizon scanning and programme adjustment.
  - Gather process, impact and outcome data. Record progress and setbacks, analyse and report.
  - Regularly review progress against objectives.
  - Report to sponsors and stakeholders

French and Gordon 2015

Stage 4: Learn and act

- Task 11 Evaluate and report
  - Record learning and share findings.
  - Report to sponsors, stakeholders and partners.
  - Report back to target audiences.
  - Report to professional audiences.

- Task 12 Review and build learning into the next wave of implementation

French and Gordon 2015

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