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Scoping: choosing the focus, situation analysis



EVROPSKÁ UNIE
Evropské strukturální a investiční fondy
Operační program Výzkum, vývoj a vzdělávání

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Selecting the purpose (for seminar?)

- What is the 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?
 - How do you know? (data - epidemiological, scientific, other research data from credible sources)
- 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)



Selecting the focus (for seminar?)

- To pick a route that will lead toward the purpose
- Can start by brainstorming potential approaches (those already taken, new opportunities, emerging needs)
- Can be related to behavior, particular population, product
- Possible criteria:
 - Behavior change potential
 - Has the area been addressed by other organizations
 - Is it good match for sponsoring organization (consistent with its mission and culture, its infrastructure, staff expertise)?
 - Which focus has the greatest funding potential?
 - Which area has the greatest potential to contribute to the social issue?

SWOT analysis

- Very adaptable - can be carried out on policies, services, interventions, products, industries or even individual people
- Can also be used to assess competition
- used to assess internal strengths and weaknesses and external threats and opportunities of an organisation or program
- Can also be used to
 - match strengths with opportunity to create a program
 - Convert weaknesses into strengths by finding a new target audience

SWOT analysis: steps

- Steps:
 - Specify again the aims and goals of the organisation or policy (otherwise too wide)
 - Identify and list the internal and external factors that help or obstacle their achievement
 - List strengths and weaknesses of the current approach or organization (*e.g. Experience with project preparation and implementation, research experience, age proximity of the target group, financing possibilities, etc.*)
 - If possible, weigh based on data and evidence, then prioritize
 - Differentiate strengths and weaknesses based on likely impact on performance
 - Seek to match strengths with opportunities
 - Seek to convert weaknesses into strenghts
 - Identify elements not to be focused on

What can organizational strengths and weaknesses be

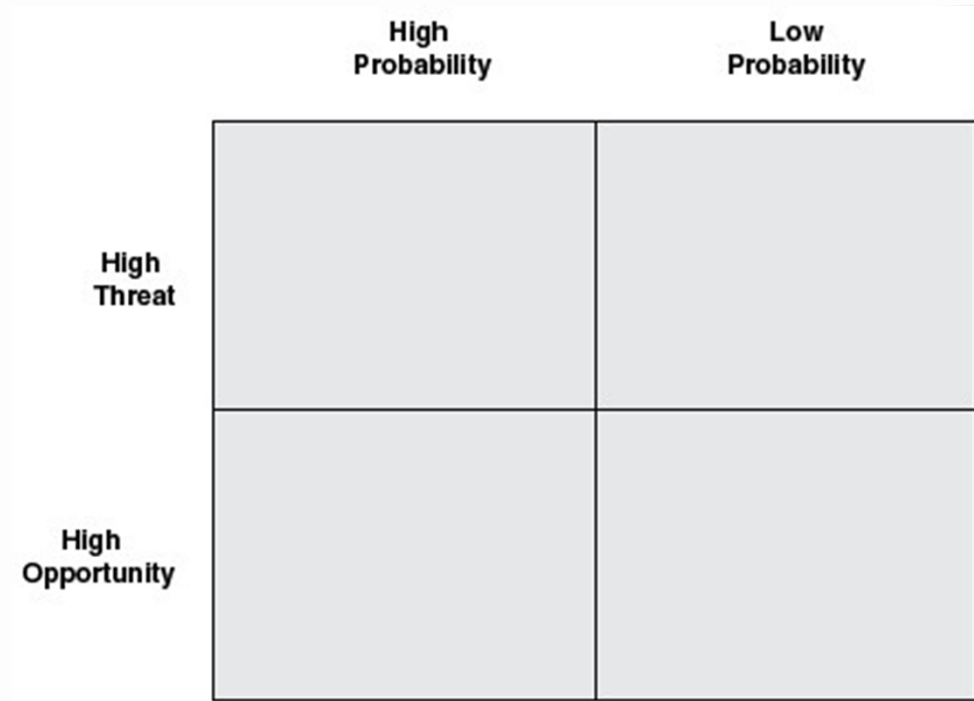
- Resources (funding levels, staff time, expertise)
- Service delivery capabilities (distribution channel availability, quality of service delivery)
- Management support
- Issue priority (within the organization)
- Internal publics (who is likely to support the effort)
- Current alliances and partners (for communication, funding, access to population, etc.)
- Past performance (reputation)

PESTLE analysis: assessing current and future external and internal threats and opportunities

- Complementary tool to SWOT
- Factors that need to be considered in the development of social marketing programs, so they are future-proofed
- Political factors (current and potential new laws)
- economic factors (e.g. Disposable income, unemployment)
- social factors (e.g. Acceptable norms of behavior in a given situation)
- technological factors (e.g. New technological possibilities that can help)
- environmental factors (e.g. Extreme weather)
- What is the probability that the future development will influence our program?

PESTLE analysis, the process

- List all possible factors in the external environment that may impact on the social marketing program
- Prioritize and rank in terms of their potential impact and likelihood of occurrence



Review of past or similar efforts

- Target Audiences
- Strategies
- Results
- Lessons Learned
- Existing Research
- Potential Materials to Use

Competition analysis

- assessment of the strengths and weaknesses of existing and potential competitors
- a form of situational analysis
- a way of generating potential intervention strategies and tactics
- Internal and external factors that oppose behaviors being promoted
 - Specific to the particular behavior being influenced
 - E.g.
- Competitors can be:
 - Behaviors our target audience would prefer over the one we promote
 - Behaviors they „have been doing forever“ (a habit they would have to give up)
 - Organizations and individuals who send counter messages

Competition analysis, the process

- Individuate the key competitive forces (e.g. fast food and sugary drinks for obesity)
- Individuate key factors from each of the competitors
- Assign the factors a weighting based on data and evidence to indicate its relative strength, the total should always make 1.0.
- Assign a rating of the factor strength of influence regarding each of the factors.
- Multiply the weighting factor by the rating to produce an overall competitor score.
- It is thus possible to determine which forms of competition are most important and how best to reduce their impact.

Example of competition analysis

Table 11.4 Example of comparative competition analysis in the field of obesity

Key Behaviour Influencing Factors	Weighting	Fast Food rating	Fast Food weighted	Soft Drinks rating	Soft Drinks weighted
1 – Extensive distribution	.2	6	2.4	3	1.2
2 – Customer focus	.3	4	1.2	5	1.5
3 – Promotions and marketing	.4	3	.6	3	.6
4 – Price	.1	7	.7	4	.4
Totals	1.0	20	4.9	15	3.7

Profiling of competitors: organizations and sectors

- For competing organisations or sectors, it is possible to list the attributes of the competitor
- profiling helps to identify potential weaknesses that can be exploited

Table 11.5 Competitor profile checklist

Background

- location of offices, plants and online presence
- history – key personalities, dates, events and trends
- ownership, corporate governance and organisational structure

Financials

- profit and loss ratios, dividend policy and profitability
- various financial ratios, liquidity and cash flow
- profit growth profile, method of growth (organic or acquisitive)

Products/services

- products offered, depth and breadth of product line, and portfolio balance
- new products developed, new product success rate and R&D strengths
- brands, strength of brand portfolio, brand loyalty and brand awareness
- patents and licenses
- quality control conformance
- reverse engineering

Marketing strategy

- objectives and targets
- segments served, market shares, customer base, growth rate and customer loyalty
- promotional mix, promotional budgets, advertising themes, ad agency used, sales force success rate, online promotional strategy
- distribution channels used (direct and indirect), exclusivity agreements, alliances and geographical coverage
- pricing strategy

Facilities

- plant capacity, capacity utilisation rate, age of plant, plant efficiency, capital investment
- location, distribution, logistics and product mix by plant

Personnel and other organisational assets

- number of employees, key employees and skill sets
- strength of management and management style
- compensation, benefits and employee morale and retention rates
- shareholder profile and issues

Corporate strategy

- vision, mission statement
- growth plans, acquisitions and divestitures

Profiling of competitors:
cultural beliefs,
economic influences,
fashion, etc.

Table 11.6 Competitive forces profile factors

Scale and scope of influence

- how many people are engaged or being influenced
- geographical focus of influence
- organisations being influenced
- systems being influenced

Sources of influence

- types of influence
- form and type of influence
- channels of influence
- media influence
- digital influence

Key players

- key leaders or individuals
- key conduits
- key organisations
- key networks

Temporal issues

- trends
 - seasonal or cyclical influences
 - likely life cycle
 - sustainability factors
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References

- French, Jeff, and Ross Gordon (2015). Strategic social marketing. Sage.
- Lee and Kotler (2016), Social Marketing, Fifth Edition, Sage.