

# DESCRIPTIONS OF STEPS IN PLANNING PROCESS

### #1. BACKGROUND, PURPOSE, FOCUS

Note the social issue the plan will be addressing (e.g., obesity), including a statement of the problem. Summarize factors that led to the development of the plan.

Then develop a purpose statement that reflects the benefit of a successful campaign (e.g., reduce obesity) and a focus that narrows the scope of the plan's purpose to one the plan will address (e.g., physical activity).

### #2. SITUATION ANALYSIS

Relative to the purpose and focus of the plan, describe the factors and forces in the internal and external environment that are anticipated to have some impact on planning decisions.

Factors and Forces Influencing Your Priority Audiences and Your Effort

<p><u>Organizational Factors</u> (Strengths &amp; Weaknesses)</p> <p>Resources Past Performance Current Alliances and Partners Service Delivery Internal Publics</p>	<p><u>External Forces</u> (Opportunities &amp; Threats)</p> <p>External Publics Political/Legal Forces Economic Forces Natural Forces Demographic Forces</p>
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### #3. PRIORITY AUDIENCE

A priority audience for your marketing efforts is selected and described. A marketing plan ideally focuses on one priority audience, although additional secondary audiences are often identified and strategies are developed for them as well, over time.

This is a 3 step process:

1. Segment the market.
2. Evaluate segments.
3. Choose one or more as a focal point.

### #4. OBJECTIVES & GOALS

Social marketing plans always include a behavior objective – something you want to influence the priority audience to do.

Knowledge objectives include information or facts you want the audience to be aware of - ones that might make them more likely to perform the desired behavior.

Belief objectives relate more to feelings and attitudes.

Goals are quantifiable desired outcomes.

### #5. BARRIERS, BENEFITS, MOTIVATORS, COMPETITORS

Barriers are reasons your priority audience cannot (easily) or does not want to adopt the behavior.

Benefits are reasons your priority audience might be interested in adopting the behavior or what might motivate them to do so.

Motivators are intervention strategies the priority audience says will help reduce barriers and provide desired benefits. Something they say we could give them, show them, or say to them.

Competitors are related behaviors your priority audience prefers or organizations that support or promote "undesirable" behaviors.

### #6. POSITIONING STATEMENT

Positioning is the act of designing the organization's actual and perceived offering in such a way that it lands on and occupies a distinctive place in the mind of the priority audience – where you want it to be. Fill in the blanks: "We want (PRIORITY AUDIENCE) to see (DESIRED BEHAVIOR) as (DESCRIPTIVE PHRASE) and more important and beneficial than (COMPETITION).

## #7. MARKETING INTERVENTION MIX STRATEGY (THE 4PS)

### PRODUCT

A product is anything that can be offered to a market to satisfy a want or need. In social marketing, major product elements include:

- Core product is the benefit of behavior change (e.g. longer healthier life)
- Actual products are goods or services you develop and/or promote to "help" your audience do the behavior (e.g. a tobacco quit-line)
- Augmented products are additional features, goods and services that assist in behavior adoption (e.g. nicotine patch)

### PRICE

Price is the cost that the priority audience associates with adopting the desired behavior. Pricing-related strategies to reduce costs and increase benefits include these 6:

1. Increase monetary benefits for the desired behavior.
2. Decrease monetary costs for the desired behavior.
3. Increase non-monetary benefits for the desired behavior.
4. Decrease non-monetary costs for the desired behavior.
5. Increase monetary costs for the competing behavior
6. Increase non-monetary costs for the competing behavior.

### PLACE

Place is where and when the priority audience will perform the desired behavior, acquire any related tangible goods, and receive any associated services.

Options include:

- Physical locations
- Phone/Mobile devices
- Mail
- Fax
- Internet
- Mobile Unit
- Where people shop
- Where people hang out
- Drive-throughs
- Home Delivery/House Calls
- Kiosks
- Vending Machines

### PROMOTION

Promotions are persuasive communications designed and delivered to highlight the offer and inspire your priority audience to action. At this step you determine messages, messengers, creative strategies, and communication channels.

Major social marketing communication channels include:

- Social Media
- Advertising
- Public Relations
- Special Events
- Printed Materials
- Special Promotional Items
- Signage and Displays
- Personal Selling
- Popular/Entertainment Media

### #8. EVALUATION PLAN

An evaluation plan outlines why you will be evaluating, what will be measured, how and when. What is measured often falls into one of the categories below:

Inputs	Outputs	Outcomes	Impact	Return on Investment
Resources allocated to the campaign	Campaign related activities	Audience response to outputs	Indicators that show levels of impact on the Social Issue	Cost and benefit per behavior change

### #9. BUDGET

Identify price tags for strategies and activities with cost-related implications.

- Product-related costs
- Price-related costs
- Place-related costs
- Promotion-related costs
- Evaluation-related costs

### #10. IMPLEMENTATION PLAN

The implementation plan functions as a concise working document to share and track planned efforts. Most commonly, plans represent a minimum of 1-year activities, and ideally 2 or 3 years.

WHAT	WHO	WHEN	HOW MUCH

## Behavior Change for Social Good

### DEFINITION

“Social marketing is a process that applies marketing principles and techniques to create, communicate, and deliver value in order to influence priority audience behaviors that benefit society (public health, safety, the environment, and communities) as well as the individual.”  
Philip Kotler, Nancy R. Lee, and Michael Rothschild, 2006

Similarities to commercial marketing include:

- Exchange theory is fundamental
- Customer-orientation is critical
- Audiences are segmented
- All 4P intervention tools are considered
- Market research is key to success
- Results are measured for improvement

In commercial marketing, however:

- Financial versus societal gain is the goal
- Competitors are similar organizations

### GUIDING THEORIES

Stages of Change Model describes six stages that people go through in the behavior change process.

Social Norms Theory is based on the central concept that much of people's behavior is influenced by their perceptions of what is “normal” or “typical.”

Health Belief Model emphasizes priority audiences are influenced by perceived personal susceptibility and seriousness of the health issue, and benefits, barriers and cues to action for the desired behavior.

Theory of Reasoned Action /Theory of Planned Behavior suggests the best predictor of behavior is intention to act and this intention is influenced by perceived benefits, costs and social norms.

Social Cognitive Theory states that likelihood of adopting the behavior is determined by perceptions that benefits outweigh the costs and belief in self-efficacy (ability to perform the behavior).

Exchange Theory postulates that in order for an exchange to take place, priority audiences must perceive benefits equal to or greater than perceived costs.

Behavioral Economics Framework helps explain how environmental and other factors prompt personal decisions and that we do not always behave rationally. Many tactical strategies relate to the Place tool (e.g. school cafeteria configuration to increase healthy eating, opt out versus opt in for organ donation).

### TEN STEPS IN THE PLANNING PROCESS

*See Reverse Side for Detailed Descriptions of Each Step*

- Step #1. Describe the Background, Purpose and Focus for the Planning Effort  
Step #2. Conduct a Situation Analysis  
Step #3. Select and Describe the Priority Audience for this Campaign  
Step #4. Set Marketing Objectives and Goals (Behavior, Knowledge, Beliefs)  
Step #5. Identify Audience Barriers, Benefits, Motivators, Influential Others and the Competition  
Step #6. Craft a Positioning Statement  
Step #7. Develop a Marketing Intervention Mix Strategy, Considering all 4P Tools:
- Product
  - Price
  - Place
  - Promotion
- Step #8. Determine an Evaluation Plan  
Step #9. Establish a Campaign Budget  
Step #10. Outline an Implementation Plan



Although steps appear linear in theory, they are actually spiral in reality with each step subject to revision as the process unfolds.

### APPLICATIONS

Most social marketing efforts are applied to:

Improving public health (e.g. HIV/AIDS, tobacco use, obesity, teen pregnancy, tuberculosis, malaria)

Preventing injuries (e.g., traffic collisions, domestic violence, senior falls, drowning, youth suicide)

Protecting the environment (e.g., water quality, air quality, water conservation, habitat protection)

Contributing to communities (e.g., voting, spaying and neutering pets, volunteering, crime prevention)

Enhancing financial wellbeing (e.g. saving for retirement, living within a budget, having a checking account)

### UPSTREAM & MIDSTREAM & DOWNSTREAM

Downstream social marketing focuses on influencing individual behaviors, while midstream social marketing focuses on influencing those “closer” to the priority audience (e.g. friends, family, teachers, healthcare providers), and upstream social marketing focuses on influencing policy makers, media, corporations and other social influencers. The same ten step process is applicable for each.

### THE ROLE FOR RESEARCH

Market research has a role to play when developing each step and properly focused research can make the difference between a brilliant and mediocre plan.

Formative Research is used to help select and understand priority audiences and develop draft marketing strategies. It may be new research (primary data) that you conduct, or it may be research conducted by someone else that you are able to review (secondary data).

Pretest Research is conducted to evaluate a short list of alternative strategies and tactics, ensure that potential executions have no major deficiencies, and fine-tune possible approaches so that they speak to your priority audience in the most effective way.

Monitoring Research provides ongoing measurement of program outputs and outcomes, often used to establish baselines and subsequent benchmarks relative to goals.

Evaluation Research, as distinct from monitoring, is research that supports a final assessment of the campaign.

## PRINCIPLES FOR SUCCESS

1. Take advantage of prior and existing successful campaigns.
2. Start with priority audiences most ready for action.
3. Select single, doable behaviors with significant potential impact.
4. Identify and remove barriers to behavior change.
5. Bring real benefits into the present.
6. Highlight costs of competing behaviors.
7. Develop and Promote tangible goods/services to help audiences perform the behavior.
8. Consider non-monetary incentives such as recognition & appreciation.

9. Make access easy.
10. Have a little fun with messages.
11. Messengers should be the ones the priority audience considers Credible.
12. Use media channels at the point of decision making.
13. Try for popular/entertainment media.
14. Get commitments and pledges.
15. Use prompts for sustainability.
16. Track results and make adjustments.