

Social Marketing CDCynergy: A Primer for Managers and Supervisors

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Introduction:

Your staff will be using this planning tool to develop a social marketing program. In doing so, they may apply principles and processes different from those usually used in your department. They will be asking certain critical questions of the research data, and making decisions based on specific criteria. They need your input and support and adequate resources to use this tool successfully and to mount an effective social marketing program. In turn, you must ensure that the directions taken and decisions made comply with your department's objectives and priorities, and that there is clear accountability for the resources used and results delivered.

This Supervisor primer aims to help you by:

- Briefly describing the purpose and steps of each of the planning tool's six phases
- Alerting you to key points in the process where your involvement may be necessary to
 - provide input and/or resources,
 - review rationale and approve recommendations/ decisions, and to
 - support strategic direction and tactics
- Pointing out important differences between the social marketing approach and program planning processes you may be using currently
- Cueing you with questions to ask and items to consider or pay attention to at key points in the planning process

The intent is to help you be an engaged, informed, and efficient social marketing consumer and manager.

Phase One: Describe Problem

At the outset of this process, your staff will develop a description of the health problem to be addressed and a compelling rationale for the program. These are to be based on a thorough review of the available data, the current literature on behavioral theory and best practices of programs addressing similar problems. Through a Strengths/Weaknesses/Opportunities/Threats (SWOT) analysis, your staff will identify factors that can affect the program being developed. Finally, your staff will propose a strategy team, probably comprised of staff, partners, and stakeholders, to help develop and promote the program.

Much of this will feel very familiar to you, but there may be one or two important differences.

What's Different?

- ▶ Behavior change, not epidemiology, will be at the center of your program. The problem description should reflect which behaviors are contributing to the problem and which proposed behaviors will be promoted as the solution.
- ▶ The problem statement should be informed by theories of behavior and how change occurs. This requires that your staff consider factors that influence behavior, or behavioral determinants. Sometimes, these may be expressed in terms of benefits and barriers.
- ▶ Factors "upstream" in the causal chain from the problem and associated behaviors may be considered.

How You Can Help:

- Confirm that the problem description and rationale fit your department's current priorities. It is essential that your staff have your endorsement and support for the problem they've chosen to tackle.
- Determine that the data presented are complete and support the problem analysis.
- Ensure that the SWOT analysis is complete and identified factors are defensible.
- Review the proposed strategy team for serious omissions or political sensitivities.
- Clarify who else must review and approve key elements of this program at various points, and help with a plan for expediting such review and approval.

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Phase Two: Conduct Market Research

Social marketing depends on a deep understanding of the consumer. That is why you conduct *market* or *consumer* research. In this phase, your staff will learn what makes your target audience tick; what makes audience subgroups or *segments* alike and different from one another. This research aims to get inside your consumer's head, understanding what s/he wants in exchange for what your program wants her/him to do, and what s/he struggles with in order to engage in that behavior. The objective of the research is to determine: how to cluster your target audience into useful segments, which target audience

segments are most ready to change their behavior, and what they want or need most in order to do that.

What's Different?

- ▶ Dividing the audience into segments: Your research aims to identify which members of your target audience are more likely to adopt the desired behavior, and important similarities and/or differences among them. These answers will set up the strategy development.
- ▶ Identifying competing behaviors: The safer, healthier behavior you want to promote is competing with innumerable other choices your target audience can make, including the risky behavior they may be performing now. To be effective, your strategy must make your proposed behavior at least as attractive as the alternatives, or you will fall short of your objectives.
- ▶ A focus on benefits and barriers: People do things because they get benefits in return. Barriers make it harder for people to act. Your research must uncover which benefits the target audience wants more and which barriers they struggle with most. Your strategy depends on this.
- ▶ Distinguishing Doers from Non-doers: One way to determine which benefits or barriers most influence a population's behavior is to compare those who do the behavior (Doers) with those who don't (Non-doers). The key is to look at how they are different, rather than the same; those factors will be the key clues to behavior change.

How You Can Help:

- Most importantly, allocate available resources for this critical phase of the process.
- Make sure that timelines and roles and responsibilities seem clear and reasonable.
- Confirm that any required review/clearance and/or procurement mechanisms are clear and in place.
- Review the research report to look for the following:
 - What most distinguishes between key audience segments?
 - Which target audiences appear most ready to change? And why?
 - What benefits and barriers do target audiences ascribe to the desired and

- competing behaviors?
- o What appear to be attractive exchanges for the respective audience segments?

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Phase Three: Create a Marketing Strategy

This is the centerpiece of your social marketing program: articulating what you are setting out to achieve and how you'll do it. Based on the research findings, your staff members begin by selecting a target audience segment and the desired behavior to be promoted. Then they will specify the benefits the target audience will receive for doing that behavior. These must be benefits the target audience really cares about and that your program can actually offer. Your staff may also specify key barriers that the program will help the target audience overcome in order to perform the desired behavior.

What's Different?

- ▶ Targeting some, not all. As noted above, your strategy likely will focus on the largest audience segments that are more ready to change. This focus enables you to tailor what you are offering uniquely to the defined target audience, which improves efficiency and effectiveness. But it means your program will not be reaching everyone equally, an outcome that sometimes presents political difficulties.
- ▶ Audience profiles. These are rich descriptions of your target audiences, designed to give planners a textured, research-driven picture of whom your program is setting out to reach and influence.
- ▶ Exchange – creating an offering, not a message. Your program must offer the target audience meaningful benefits in exchange for adopting the desired behavior. This offering must be clear, readily available and appealing to your audience.
- ▶ Interventions that address key determinants. It is likely that the strategy you review will contain a mix of interventions. Each one should clearly address one of the identified behavioral determinants, with an emphasis on key benefits and barriers.
- ▶ Finally, your research may indicate that existing programs/services need improvement or replacement because they don't reach the right audience or because

they fail to meet key audience needs. This may ruffle feathers, but keep in mind the clients you are trying to serve.

How You Can Help:

- Most importantly, confirm available budget and other needed resources for the program.
- Review the rationale behind the selection of the target audience, desired behavior, and behavioral goal.
- Review the intervention mix and the respective objectives:
 - Is it clear how each intervention either adds value or reduces costs to the target audience?
 - Is it clear what each intervention is intended to do and how it affects the desired change?
 - Taken together, will the overall mix of interventions reach enough of the target audience often enough to have the desired impact?
 - Is the overall mix feasible for your staff to develop, launch and manage? If not, is it clear how others will be involved? Is that kind of involvement appropriate and feasible?

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Phase Four: Plan the Intervention

This phase involves developing interventions and tactics in four possible areas – new or improved products or services, staff training, policy change, and communication. Your staff will likely be quite familiar with these processes and considerations. They involve keeping on strategy, ensuring that each intervention addresses the respective target benefit or barrier, is accessible and appropriate for the target audience, and is ready to go when it needs to be. Your staff will develop a plan, timeline and budget for each of the proposed interventions. They will highlight where key partners and stakeholders are needed and how to engage them. At the end of this phase, you should be able to review a comprehensive workplan, describing and tying together all the pieces.

What's Different?

- ▶ Keep focused on the target audience. The program is for

the audience, not the implementers. If your staff members become strongly invested in a particular approach, get suspicious. Ask them how they know this is what the audience wants.

- ▶ Delivery, reach and outcome objectives. The intervention components of the overall plan must reach enough of your target audience and must deliver what they want and need in order to make an evident impact.
- ▶ Interaction between interventions: You want repeated exposure to your products, services and messages. Plan for reinforcement and repetition.
- ▶ Better to do a few things very well, than more things insufficiently.

How You Can Help:

- Review the overall workplan:
 - Are the respective objectives of each activity clear, feasible and on-strategy?
 - Are roles and responsibilities clear and feasible?
 - Do timelines and budgets appear reasonable and fit your departmental schedules?
 - Are necessary review/clearance and procurement mechanisms clear and in place?
- Review rationale and technical content for proposed modifications/improvements:
 - Does each of the proposed activities support the overall strategy? Do they clearly offer the benefits sought by the target audience? Do they lower or remove key barriers?
 - Have the activities been pretested and revised based on the findings?

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Phase Five: Plan Monitoring and Evaluation

During this phase, your staff will determine what information needs to be collected, how the information will be gathered and how the data analysis and reporting will take place. Social marketing is based on an iterative design model, so monitoring data are used to both ensure the program is being

implemented as planned and to examine whether your strategy and tactics are suitable or may need tweaking. Your staff also will put a proverbial finger in the wind to consider if environmental factors (policies, economic conditions, new programs, structural change or improvement, etc.) have changed in ways that affect your program.

Your staff also will design a research plan to evaluate the effects or outcomes of the social marketing program. This will involve examining whether:

- Desired effects were achieved
- Observed effects can be attributed to what your program did
- The underlying logic of the intervention and its relationship to desired effects are sound

As you know, good program evaluations are highly prized by policy-makers and funders, but rarely paid for. These evaluations can be modest or extensive, but should be designed to maximize the available resources. So at an early point in this process, you will want to check in with your staff to discuss their resource needs and what you can make available for these purposes.

What's Different?

- ▶ Gather data to understand "How we are doing" so the program can be adjusted and improved. Your target audience's exposure, recall and opinion are primary concerns here.
- ▶ You will assess indicators that reflect the behavior change objectives that were set, rather than the ultimate epidemiology or the morbidity / mortality objective. For example, the evaluation design might examine changes in audience perceptions of consequences, or self-efficacy, to performing the desired behavior.

How You Can Help:

- Review identified program indicators. Are they clearly linked to the respective intervention objectives? Will they satisfy your departmental accountability requirements?
- Review the monitoring and evaluation plan. Are roles and responsibilities clear? Do timelines and budgets appear reasonable and fit your departmental schedules?
- Keep in mind that inconsistent evaluation results often result from:
 - Using the wrong intervention (targeting the wrong behavior or wrong determinant of behavior);

- Poor implementation of a good intervention (poor execution, not reaching enough people, wrong target audience);
- Measurement problems (impact of secular events); and/or
- Unrealistic expectations from the outset.

Be sure to discuss these issues with your staff.

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Phase Six: Implement the Intervention and Evaluation

Finally, after all the planning, your staff is ready to implement the program and the evaluation. This phase walks them through steps for launching the program; producing materials; procuring needed services; sequencing, managing and coordinating the respective interventions; staying on strategy; fielding the evaluation; capturing and disseminating findings and lessons learned; and modifying activities as warranted.

For the most part, your staff will be familiar with these concepts and procedures. However, they may need your support in sticking to the identified strategy while the interventions have adequate time to unfold and reach its intended target audiences. Not fully implementing the program plan is one sure way to produce mediocre results. At the same time, your monitoring plan should be alerting you to any issues that require urgent attention or modification. Staying on top of important stakeholder and partner perspectives and concerns is an important function during this phase.

What's Different?

- ▶ Monitoring data driven mid-course corrections, as appropriate. Your staff must feel comfortable making necessary adjustments to the strategy and tactics if they learn that something's not working. You should be brought in to review and approve any proposed changes, and defend them as needed.

How You Can Help:

- Establish an appropriate schedule of project updates – both technical and financial.
- Help your staff to stick to the strategy. This may entail either giving them a buffer from external pressure, or questioning sudden opportunistic departures from the strategy or program plan.

- Monitor the perspectives and concerns of partners and stakeholders. Are partners pleased with the program’s direction and progress? Are stakeholders apprised and supportive of the project and its accomplishments?

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Social Marketing CDCynergy: Key Points and Considerations

Phase 1: Describe Problem

Points in Process

- ▶ Review problem description and rationale
- ▶ Review composition of strategy team
- ▶ Review SWOT analysis

Ask/Consider This:

- Does this fit with current departmental priorities?
- Are the relevant data presented? Do the data support the problem analysis?
- Does the team fit well together? Does it fit with your department?
- Are there any political sensitivities? Anyone missing?
- Any there any red flags?
- Are there any serious omissions?

Phase 2: Conduct Market Research

Points in Process

- ▶ Review research plan
- ▶ Review research report

Ask/Consider This:

- Confirm available resources
- Are roles and responsibilities clear?
- Do the timelines and budgets appear reasonable and fit your departmental schedules?
- Are necessary review/clearance and procurement mechanisms clear and in place?
- Can you answer the following:
 - What most distinguishes between key audience segments?
 - Which target audiences appear most ready to change? And why?
 - What benefits and barriers do target audiences ascribe to the desired and competing behaviors?
 - What appear to be attractive

exchanges for the respective audience segments?

Phase 3: Create Marketing Strategy

Points in Process

Ask/Consider This:

- ▶ Review identified target audience(s) and behavior(s)
 - Is the rationale (research and logic) behind the selections clear and sound?
- ▶ Review behavioral goal (this is what your social marketing program aims to achieve)
 - Will achieving this goal have a sufficient impact on the original problem described?
 - Does the goal seem feasible?
- ▶ **Allocate available budget and other resources for the program**
 - Is the effort sufficiently well-funded to reach enough of the target audience to achieve your behavioral goal?
- ▶ Review the intervention mix and respective objectives
 - Is it clear how each intervention either adds value (offers more desired benefits) or reduces costs (lowers a relevant barrier) to the target audience? Are these benefits and barriers supported by the research findings?
 - Is it clear what each intervention is intended to do and how it affects the desired change?
 - Taken together, will the overall mix of interventions reach enough of the target audience often enough to have the desired impact?
 - Is the overall mix feasible for your department to develop, launch and manage? If not, is it clear how others will be involved? Is that kind of involvement appropriate and feasible?

Phase 4: Plan the Intervention

Points in Process

Ask/Consider This:

- ▶ Review selection of new or improved services or products
 - Is the rationale behind the modifications/improvements clearly and convincingly presented? Is it clear how/why the target audience will respond better?
 - Does each of the activities support the overall strategy?
 - Are the respective development processes, materials, delivery channels and partner roles clear and feasible?
 - Is the plan for pretesting the new or improved products or services clear and

feasible?

- ▶ Review proposed staff training plan
 - Is the rationale and approach for staff training clear and feasible
 - Confirm budget and other resources for the staff training
- ▶ Review proposed policies to be enacted or changed
 - Is the rationale clearly and convincingly presented? Does it support the overall strategy?
 - Is there a clear approach for achieving the policy change?
 - Are there red flags to be aware of?
- ▶ Review the communication plan
 - Are respective audiences, benefits and messages clear and supported by prior research?
 - Does each of the activities support the overall strategy?
 - Are the respective materials, delivery channels and partner roles clear and feasible?
 - Is the plan for pretesting the messages and materials clear and feasible?
- ▶ Review the work plan
 - Are roles and responsibilities clear?
 - Do the timelines and budgets appear reasonable and fit your departmental schedules?
 - Are necessary review/clearance and procurement mechanisms clear and in place?

Phase 5: Plan Program Monitoring and Evaluation

Points in Process

Ask/Consider This:

- ▶ Review identified program indicators
 - Are they clearly linked to intervention objectives?
 - Will they satisfy your departmental reporting and/or accountability requirements?
- ▶ Review monitoring and evaluation plan
 - Are roles and responsibilities clear?
 - Do the timelines and budgets appear reasonable and fit your departmental schedules?

Phase 6: Implement Interventions and Evaluation

Points in Process

Ask/Consider This:

- ▶ Establish schedule of project updates – both technical and financial
 - Has the overall strategy changed at all? If so, why?
 - Are there any external (policy or



Monitor perspectives of partners and stakeholders

environmental) or internal factors or issues that may adversely affect the strategy or its implementation?

- Are audience exposure and/or service delivery levels in line with projections?
- Is spending in line with projections? Are there any issues to be addressed?
- Are partners pleased with direction and progress?
- Are key stakeholders (particularly those who approve ongoing budget allocations) apprised and supportive of the project and its accomplishments?

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