

MARKETING PLAN

Basics Applied

First, a quick review. Social marketing is about changing behavior, so every campaign must start by targeting the behavior you want to change. A behavior is an observable action taken by a specific segment of the population. Once you have a behavioral goal, you need to develop a strategy focused on what's influencing that behavior -- and that influence may not be what you initially think. People are different, and you need to offer specific types of people what they specifically want, not what you think they should want. In general, that will mean making your target behavior more fun, easy or popular.

Simple, no?

Simple to say. Tougher to execute.

In this section, we give you a basic step-by-step approach to designing a social marketing campaign. There are so many caveats here we cannot begin to list them all. Just understand that your strategy is only as good as your assumptions, so if you assume most kids love vegetables ... well, you get the idea. There are tons of potential pitfalls: Bad audience research or no research at all can lead to bad results. Poor implementation can make even a good approach ineffective. What this approach offers is a way to ask the right questions and give your campaign a certain logic. It is a way to think more like a marketer. It is a way to give your behavior-change program a fighting chance. Once you complete these steps, consider putting together a more detailed social marketing plan, potentially working with a marketing professional. For an example outline of a marketing plan, go to www.socialmarketing.info.

Step One: Select your target behavior

What's your vision of success?

If your project is like most others, you are focused on a collective social outcome – cleaner air, smarter students, healthier children or something else along those lines. There might be other solutions – putting filters on smokestacks, for example – that can be performed without mass behavior change. You can only employ social marketing if there's a specific behavior necessary to reach your goal – like, for example, getting people to actually install those filters properly.

That's where social marketing begins – with the behavior.

So how do you decide what behavior you want to change: Just WHO should be doing exactly WHAT? The answer isn't always simple. Often this means dissecting your goals into a set of behaviors performed by different groups, then deciding which populations might have an outsized impact or might be easiest for your organization to change. Sometimes, we at Marketing for Change are brought in to moderate these discussions as groups and their stakeholders struggle to agree on what really matters in terms of behavior. Suffice it to say this step, while not always easy, is essential. And if needed, it makes sense to get help from an outsider to facilitate this discussion.

A target behavior in social marketing has two parts: the ACTOR and the ACTION. The two are connected. You can't address one without considering the other. A campaign to encourage young mothers to exercise, for example, is totally different than an exercise campaign aimed at retirees. So the first step is to name (1) the specific actors you want to influence and (2) the precise action you want them to take. Avoid listing what you what you are against (for example, don't smoke). List the action they should take (refuse a cigarette). You can see an example in the box below.

At this point, you may also want to "segment" your actors. There are entire books on this subject, but the concept itself is simple: The more you group like actors, the better able you will be to address specific needs and desires. Remember how we talked about everyone being different? (Specifically, we called you weird). This is where we try to group people by what makes them different. In the earlier example, we might decideto target first-year students instead of all students because first-year college students approach drinking differently from more experienced upper classman. There are dozens of segmentation schemes you might consider – splits based on demographics, psychographics, stages of change, and much, much more. For now, just remember the simple idea: The more narrowly defined the target actors, the more specific your program can be to their needs. Just make sure you are targeting enough people to make a significant impact on your program's bottom line.

ACTOR	ACTION
First-year college students	Abstain from drinking alcohol or limit alcohol consumption to four or fewer drinks in a single evening.

Step Two: Evaluating the present situation

Once you know specifically who you want to do what, you need to take a look at why these people are not currently doing the targeted action. In other words: What's the problem? You will also want to be as specific as possible about your target action. What's the context? When is it supposed to happen?

Consider, for example, where and when your target behavior is taking place. For example, helping a father put a four-month-old in an infant seat is one thing; helping that same father place a six-year-old in a booster seat is another. Encouraging parents to use the "proper restraint" is a good general statement, but it is really several different marketing goals and should be considered that way.

SOME WAYS TO DO THIS INCLUDE:

- Market analyses (pinpointing how a particular behavior is positioned relative to the alternatives);
- Primary and secondary audience research (primary is the research you do yourself to learn what your actors want, need, think and feel; secondary research is the stuff you learn by studying other people's research into the same group of people); and
- A review of the existing customer data (a fancy way to say anything that you can find in reports, in databases or on the Internet about your target actors) and studies on the behavior.

When it comes to primary research, it is best to use a combination of qualitative research, such as focus groups, ethnographies and in-depth interviews, and quantitative research, such as surveys, so you can learn both how people process the issue (qualitative findings) and how many feel one way or another (quantitative findings). Not every program can afford this kind of research. For those who can, the value of the research is entirely dependent on how the information is gathered and analyzed. Bad data or insufficient analysis can be worse than no research at all. In general, the idea is to review all results in context. Different organizations can afford different levels of sophistication, and every project is a bit different. You will probably need at least some consulting help from professionals in the field. The point here is you need this research: You can't begin to design a program to influence people if you don't know a lot about them.

Regardless of how you plan to get the answers, the questions are the same. They revolve around the same three pillars described above – perceived consequences (fun), self-efficacy (easy) and norms (popular).

The worksheets that make up Section 3 show some of the key questions you need to explore. These are not the specific questions you would send out in a survey or moderator's guide; they are tools to help you determine how to design your research. Each research question goes to a common determinant of behavior – that is, a reason why someone might do something. In short, that's the main question you're exploring: Why would people do what I want them to do? What's in it for them – especially in the short term on the individual (versus societal) level?

You will also want to design your research so it examines the need-states of your actors (more on need-states in Step Three).

One final bit of advice here: As you consider each of these questions, it is important that you do so from the point of view of your target actors. Something you may see as a reward, they may view as a penalty, or vice versa. One example: The health risk posed by cigarettes can actually be positioned as a benefit to certain segments of teens. It allows them to quite literally take their lives in their hands, a way for them to fulfill their natural yearning for rebellion.

Step Three: Identify actor need-states

This next step is tricky. It involves putting aside your target behavior for a moment and thinking very broadly about your target actors. What are their interests, their aspirations, their needs at this specific time in their lives? These factors have been called many things. We like the term "need-states" because it implies a state of mind rather than a physical need, like food and water. It's as much about what the actors want as what they truly need.

To provide a benefit your target actors desire, you have to understand what they want, and not just in terms of the behavior you are targeting. Back when Marketing for Change Chairman Peter Mitchell was working with the agency Crispin Porter + Bogusky on Florida's "truth" anti-smoking campaign, everyone involved was well aware of the many benefits of refusing tobacco – your clothes smell better, your skin is healthier, you are in better shape. But here's what was more important: Cigarettes were meeting some core need-states of teenagers, most notably rebellion and independence. If the campaign to reduce tobacco didn't address those issues, it wouldn't be successful. So instead of promoting an existing benefit of avoiding tobacco use, the truth campaign created a new benefit – refusing a cigarette would now offer the opportunity to rebel against an adult institution, the tobacco industry. The truth campaign was all about positioning smoking as something some adults were conning teens into doing and positioning the refusal to smoke as a fun act of rebellion against these adults. That met a core need-state of teenagers, and it was one reason the campaign was so successful.

So what do your target actors really want at this time in their lives? Make a list of the three to six most important need-states. Some possible ideas are listed below:

Whatever you list, remember it. Put a list on your desk, next to your computer. Memorize it. Dream about it. Benefits related to these need-states will be the most powerful by far.

Step Four: Listing potential offers

Now, let's get back the behavior you are trying to encourage. In many ways, marketing a behavior is about solving a problem your target actors face. They need something, want something. You can encourage a behavior if it helps them meet one of those recognized needs, wants or need-states. It also helps just to make the behavior easier. If you want people to come to your health clinic, put it on the bus route.

This is the step where you start looking for ways to solve problems. Look back at your notes about the present situation – specifically note the barriers and benefits embedded in your answers – then consider what your organization or a partner could do to:

- Help people overcome a barrier to the behavior;
- Create a new benefit of doing the behavior; and
- Promote any benefit valued by the target actors, but not widely known (no reason to promote a benefit everyone already knows).

In each instance, think about whether you are addressing your actors' need-states identified in Step Three. Again this begins with asking the right questions, and those are included as part of the worksheets in Section 3. There are many answers to these questions – this is where you can really be creative. Maybe the answer involves an intervention no one has ever tried. Maybe the world is waiting for you and your social marketing agency to develop it. But we'll give you some general ideas anyway.

Common Behavior-Change Interventions

IMPROVING SKILLS BY

- Offering training
- Offering clearer directions
- Offering more guidance
- Making the target behavior itself simpler

Adventure	Financial Security	Order
Approval	Freedom	Popularity
Autonomy	Friendship	Power
Balance	Fun	Recognition
Basic Needs	Hope	Respect
Belonging	Identity	Safety
Challenge	Knowledge	Self-Esteem
Community	Love	Simplicity
Control	Luxury	Sympathy
Empathy	Meaning	Wealth

BOOSTING YOUR TARGET ACTORS' CONFIDENCE BY

- Acknowledging any challenges/showing empathy
- Giving social "permission" to engage in behavior
- Allowing people to "sample" the behavior

OVERCOMING EXTERNAL BARRIERS BY

- Removing any stigma around behavior
- Making the behavior more convenient
- Gradually engaging the target actors through permission marketing. (In general, permission marketing means slowly winning the actor's "permission" to make your sale. It might begin with someone giving you permission to email them something (in exchange for getting information they are already seeking), then maybe getting permission to send them ideas about how to change their behavior, and so on.)
- Advocating for policy changes
- Developing partnerships with organizations that dominate the external environment around a behavior

GIVING THE TARGET ACTORS MORE CONTROL BY

- Offering more options or choices
- Allowing people to more easily customize what they do
- Fitting the behavior more closely to their lifestyle or work demands

REDUCING A NECESSARY INVESTMENT OF TIME, MONEY OR OTHER RESOURCES BY

- Lowering the price of a program
- Redefining the behavior so it can be done in less time or with fewer resources

PROMOTING “WHAT’S NORMAL” BY

- Surveying the target actors and publicizing the results to reveal a norm that exists but may not be widely recognized
- Publicizing how more and more people, perhaps celebrities, are doing the behavior to hint at an emerging norm
- Recruiting a network of grassroots supporters who can act as advocates for the behavior

MAKING THE BEHAVIOR MORE OF AN EXPECTATION BY

- Reworking communication messages with target actors to position the behavior as expected rather than sought
- Partnering with organizations tied to the target actors to promote the behavior as part of that group’s identity
- Repositioning the behavior, through advertising and other communication, as something target actors are expected to do

LEVERAGING TRADITION BY

- Embedding the behavior into a regular and popular community activity
- Linking the behavior to a popular traditional activity or custom
- Making the behavior fulfill a self-standard of the target actors
- Repositioning the behavior, through advertising and other communication, as something specific to the target actors
- Linking the behavior to other activities specific to these target actors

OFFER NEW REWARDS BY

- Alleviating any perceived risk associated with engaging in the behavior
- Eliminating or reduce any penalties associated with the behavior
- Associating the behavior with positive emotions

Step Five: Choosing a strategy

Now you have some ideas. The next step is to prioritize and build a simple strategy. You should be able to describe your strategy in one or two sentences – something like: We are going to get people to [do your behavior] by [what you’re offering] through [how you make the offer real].

Here’s an example from our Chesapeake Club campaign:

We are going to discourage people from fertilizing in the spring by offering those who wait a new lifestyle brand imbued with the cachet of the Chesapeake Bay. We’ll create the brand through a mass media campaign, a partnership with restaurants, a lawn service offering, and a useful lifestyle website.

The goal here is to get your mind around what you are trying to accomplish. In the Chesapeake Bay example, our research showed no statistical relationship between fertilizer use and pollution concerns. Any overly environmental message would simply be tuned out. So instead, we decided to build a lifestyle brand that would associate our target behavior with a high-end local lifestyle. We looked for tactics that would create this kind of brand. Having a TV spot featuring the Sierra Club president would have been a mistake; that would have built an environmental, not a lifestyle, brand.

Instead, our spokesman was someone eating seafood and our tag line was “save the crabs, then eat ‘em.” The humor helped make us less preachy and more fun.

Your strategy should do the same thing. It should be a way to steer your campaign. To create this strategy, look over the ideas you put together in Step Four, and develop a theme or two that might tie the approach together. It's important at this point that you abandon some of your ideas. Even if your resources are unlimited, your attention is not. You want to find the sweet spot – the one change that will make the most difference – and develop your campaign around that.

This is also another good time to get professional marketing help, if you have not been using some already. You should have fleshed out most of the issues. But without a lot of marketing experience, it may be tough to see an overarching theme. After all, remember you are probably deep in the trees on this issue, so it's difficult to see the forest.

Step Six: Making your plan

With your strategy in place, you can begin planning your tactics. In short, these are the specific actions you are going to take, such as putting up posters or developing a partnership. The breadth of tactics you can select – from advertising to program alterations – goes well beyond the scope of this little book.

Just remember to think beyond messaging. Messages can be very important, but other factors – like the design of your program or how you help people with the behavior – are often even more important. For example, you can ask yourself if what people experience in your program is as pleasant as a break at Starbucks or more like a stop at the Division of Motor Vehicles. Remember the part about making your target behavior fun, easy and popular. Just telling people that it's fun, easy and popular is not enough. It's got to feel that way.

Your marketing plan document can take whatever format is most helpful for you. These plans typically contain:

- A clear statement of your goals, including measurable objectives you plan to track;
- A description of your target actors (this is often call a "target audience," a phrase we reject as too passive), including details about what segments will get the most focus;
- A market analysis, showing how your behavior or program is positioned relative to the competition;
- A "logic model" showing a flow chart of how you expect to influence behavior and noting where you intend to measure progress;
- A brief description of your strategy and core tactics;
- A timeline showing what you plan to do to implement the program.

You can download a marketing plan format at www.socialmarketing.info.

Step Seven: Implementation and evaluation

Not much explanation is necessary here. You simply execute the plan developed in the earlier steps. Easier said than done, of course, and there is a lot of advice available about how to execute various tactics. Seek out what you can – from your colleagues, books and the Internet, and professional firms like Salter>Mitchell (www.SalterMitchell.com).

Finally, you should also invest the necessary time and resources into monitoring and evaluation. Unless you measure your impact, you have no idea of what you're doing.

You can find a brief discussion of monitoring and evaluation and links to other evaluation resources at www.socialmarketing.info.

One question we get all the time is: How do I start applying this approach called social marketing? The simple answer is: You just start thinking differently. The next time you face a behavior-change challenge, apply the concepts in this little book.

To help you do that, we've included some worksheets we at Marketing for Change use in the training workshops we do for companies, non-profits and government organizations. They are a series of questions you can ask yourself as you address any problem – just remember to start by boiling down the issue to the specific behavior you need to change. Answer the questions on the left side first then move to those on the right. Finally, read through what you have and see if there are ideas you can build a change strategy around. (Also, remember, all of this will be more valuable if your answers are based on research and not just hunches).

The worksheets begin on the next page – and mark the end of this little book on social marketing. As we said at the beginning, this book is far from comprehensive. It's a starting point. But hopefully this little book, like a good social marketing program, has helped solve some problems for you – and encouraged you to change your behavior.

For more advice about resources and information around social marketing, go to www.socialmarketing.info.

Efficacy Barriers	Improving Efficacy
Why isn't this behavior EASY?	Making the Behavior EASIER
What SKILLS, if any, do the target actors lack?	How might the target actors be taught needed SKILLS (through training, directions or illustrations) OR how could the desired behavior be adjusted so these skills are no longer necessary?
Where do the target actors lack CONFIDENCE around the desired behavior?	How can the actors' CONFIDENCE be increased OR how could the desired behavior be adjusted so this level of confidence is no longer necessary?
What EXTERNAL BARRIERS (realities outside the actors' control) such as location, availability, and transportation, discourage the desired behavior?	What EXTERNAL BARRIERS can be eliminated or reduced?
Where do the actors feel a loss of CONTROL or want more control?	How can the target actors be given the perception of more CONTROL over the desired behavior?
What does the desired behavior COST the target actors, in terms of time, money or some other resource?	How can the behavior's COST to target actors be eliminated or reduced?

Existing Norms	Building Supportive Norms
<p>What is NORMAL now?</p>	<p>Creating a NEW NORMAL</p>
<p>What do most members of the target actor group USUALLY DO when it comes to this behavior?</p>	<p>If the desired behavior is more prevalent than people think, how can you raise AWARENESS that this behavior is more common than they realize?</p>
<p>What do the actors FEEL IS EXPECTED when it comes to this behavior?</p>	<p>How can the desired behavior be positioned more as an EXPECTATION – as something the target actors believe others expect of them?</p>
<p>What do PEOPLE LIKE THEM do when it comes to this behavior?</p>	<p>How can the HABITS and CUSTOMS of the target actors' social group be leveraged to support the desired behavior?</p>
<p>What SELF-STANDARDS (people's expectations of themselves) are being fulfilled or violated?</p>	<p>How can the behavior appeal to the target actors' ASPIRATIONS and SELF-IMAGE?</p>

<h2 style="text-align: center;">Perceived Consequences</h2>	<h2 style="text-align: center;">Changing the Perceived Consequences</h2>
<p>What do people EXPECT will happen?</p>	<p>Creating NEW EXPECTATIONS</p>
<p>What are the perceived REWARDS for the current behavior? For the desired behavior?</p>	<p>What new REWARDS could be added for the desired behavior or how could more people be made aware of the behavior's existing (but not widely recognized) rewards? What could be done to reduce the perceived rewards of the current behavior?</p>
<p>What are the perceived RISKS (something that might happen) of each behavior?</p>	<p>How could the RISKS of doing the desired behavior be reduced?</p>
<p>What are the PENALTIES (something that will happen) for each behavior?</p>	<p>How can the PENALTIES associated with the desired behavior be reduced or eliminated?</p>
<p>How does each behavior make the target actors FEEL?</p>	<p>What might make the target actors FEEL better about the behavior?</p>



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