

Initial Planning Phase

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Overview of Steps in Initial Planning Phase

- ❑ Background statement
- ❑ Situational analysis
- ❑ Select target market
- ❑ Specify goals and objectives
- ❑ Market research

Step One: Prepare Background, Purpose, and Focus Statements

- ❑ Background:
 - Write brief description of the problem or need for the program
- ❑ Purpose:
 - State your general purpose
- ❑ Behavioral focus:
 - State a behavioral goal or focus

Behavioral Focus

- ❑ Social marketing is inappropriate for problems that do not have behavioral determinants
- ❑ Some problems are associated with only one behavior
- ❑ When multiple behaviors impact problem, need to compare alternatives

Selecting Behavioral Focus

- ❑ Based on
 - Impact
 - Likelihood of change
 - Strength of competition
 - Resistance
 - Availability of effective interventions

Selection Process

- ❑ List specific behaviors
 - ❑ Estimate impact
 - ❑ Estimate probability of change
 - Resistance to change
 - Availability of evidence-based interventions
 - Search for best return on investment
- Based on McKenzie Mohr, D. and Smith, W. (1999).

Step One Worksheet: Describe the Background, Purpose, and Focus

Background or Needs Statement:

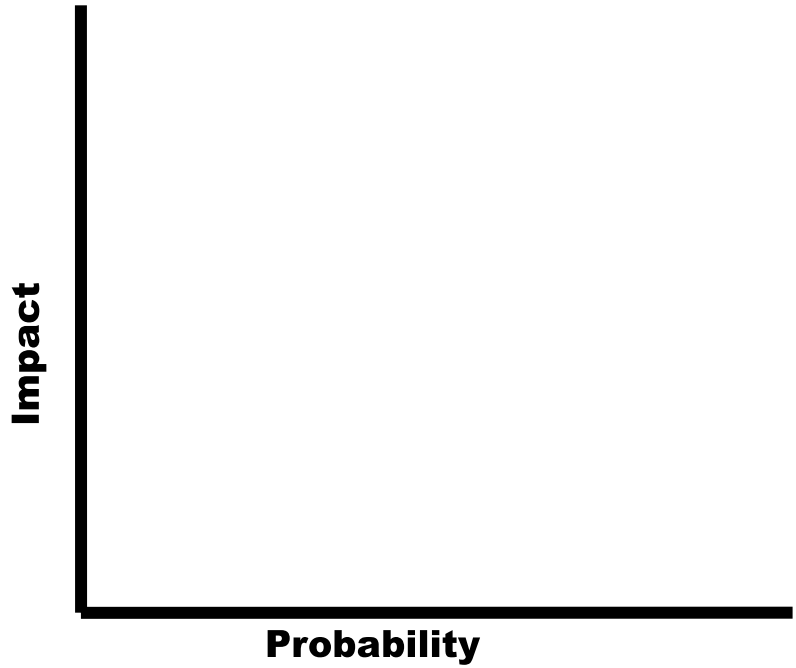
Purpose:

Focus:

Behavioral Focus Worksheet

Potential Behaviors

- ①
- ②
- ③
- ④
- ⑤



Step Two: Situational Analysis

- Consider external factors
 - Demographic trends
 - Cultural trends
 - Economic forces
 - Stakeholders
 - Political forces

- Consider internal factors
 - Organizational resources
 - Service delivery capabilities
 - Partners
 - Previous successes

Conduct SWOT Analysis

- Strengths
- Weaknesses
- Opportunities
- Threats

Step Two Worksheet: Situational SWOT Analysis

Consider Internal Organizational Situation

Strengths

Weaknesses

Consider External Situation

Opportunities

Threats

Step 3: Select Target Markets

- ❑ Primary audience - Whose behavior do you want to change?
- ❑ Secondary audiences
 - Influencers
 - Gatekeepers

Segmenting Populations Based on Differences

- ❑ Behavior
- ❑ Benefits
- ❑ Costs
- ❑ Personal characteristics
- ❑ Others

Segmenting based on Behavior

- ❑ Past behavior
- ❑ Current behavior
- ❑ Future intentions
- ❑ Other
- ❑

Segmenting based on Personal Characteristics

- ❑ Demographics
- ❑ Psychographics
- ❑ Lifestyle
- ❑ Stage of life
- ❑ Others

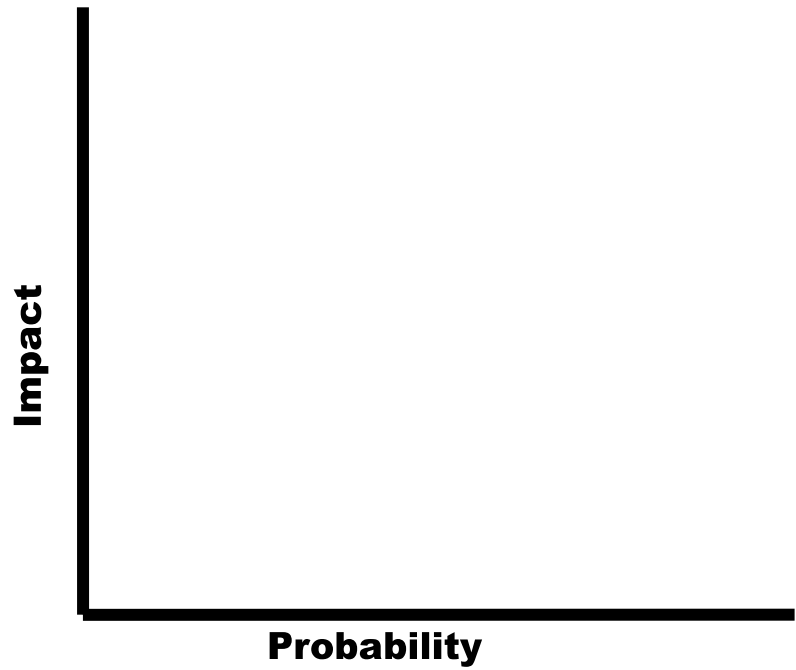
Selecting Criteria for Selecting a Priority Population or Segment

- ❑ Return on Investment
 - Potential impact
 - Size of group
 - Need or benefit received
 - Responsiveness
 - Readiness to change
 - Likely response to your efforts

Step 3 Worksheet: Select Target Markets

Potential Segments

- ①
- ②
- ③
- ④
- ⑤



Step Four: Prepare Behavioral Objectives

- ❑ Decide what specific behaviors to recommend
- ❑ Establish quantifiable behavioral objectives
- ❑ At this point, typically do not have enough data and must begin next step – identifying gaps you need to fill with market research.

Formative Research Worksheet

- ❑ Each page is devoted to a single marketing decision
- ❑ 1st Column: list ideas to confirm or explore
- ❑ 2nd Column: record existing data that you can review to make that decision
- ❑ 3rd Column: identify data collection methods
- ❑ 4th Column: specify recruitment procedures
- ❑ 5th Column: assign task to specific people or organizations

Step Five: Market Research

- ❑ Develop Plan
- ❑ Implement Plan
- ❑ Use Results to Prepare Strategy Workbook

Develop Research Plan

- ❑ Based on marketing decisions
 - What to recommend – behavioral objective
 - How to refine segment
 - Which benefits to promise
 - Which costs to lower or make affordable
 - How to place the product and reinforce adoption
 - How to promote the product

Step 5 A. First Decision: Behavioral Objectives

- ❑ List Options
- ❑ CDC recommendations
- ❑ Other scientific standards or recommendations
- ❑ Examples from other successful program
- ❑ Identify Information gaps
 - Consumers' reactions to each option
 - Stakeholders' reactions to each option
 - May have other concerns

FORMATIVE RESEARCH WORKSHEET

Marketing Decisions	Data to Assemble or Collect	Best Data Collection Method	Sample: Who eligible and how recruit	Person Responsible
<p>Behavioral recommendations</p> <p><input type="checkbox"/> Options being considered</p>				

Step 5 B. Second Decision: Refine Segment

- ❑ Many target markets have segments within them that require different approaches
- ❑ Also want a vivid profile or picture of the segments you will give greatest priority
- ❑ List market segment(s) selected
- ❑ Consider data needed to confirm or refine segmentation
- ❑ List characteristics you need to understand
- ❑ Consider secondary audiences
 - Who influences the primary audience
 - Who could facilitate or promote change?
- ❑ List existing data sources
- ❑ This reveals gaps you will have to address with original data later

Step 5 C. Third Decision: Which Benefits to Offer

- ❑ Goal is to find benefits that distinguish product from competition

Step 5 D. Fourth Decision: Which Costs to Lower and Other Factors to Address

- ❑ Goal is to find factors that have greatest impact on behavior

Role of Theory

Guide search for factors to address

Social ecology model helps us divide into external and internal factors

External factors to consider

- ❑ Policies – existing or potential
- ❑ Access to needed resources, products or services
- ❑ Social norms
 - Who do they listen to?
 - What are they saying?
- ❑ Skills
- ❑ Cultural trends
- ❑ Other constraints/opportunities
- ❑

Internal Factors to consider

- ❑ Perceived costs
- ❑ Perceived benefits
- ❑ Perceived risk
- ❑ Self confidence or self efficacy
- ❑ Other beliefs, values, attitudes

Step 5 E: Fifth Decision: Placement

- ❑ Where to offer services and products
- ❑ Partners who can support behavior change

Step 5 F: Sixth Decision: Promotion

- ❑ Spokespersons
- ❑ Information channels
- ❑ Communication Guidelines

Marketing Decisions	Data Available or Needs to be Collected	Best Data Collection Method	Information Sources	Who will Be Responsible for Data Collection
<p>Placement</p> <ul style="list-style-type: none"> ❑ Distribution channels for products ❑ Location of services ❑ Partners or intermediaries 				

Marketing Decisions	Data to Assemble or Collect	Best Data Collection Method	Sample: Who eligible and how recruit	Person Responsible
<p>Promotion</p> <ul style="list-style-type: none"> <li data-bbox="191 435 401 505">□ Information channels <li data-bbox="191 656 459 691">□ Spokespersons <li data-bbox="191 878 338 914">□ Tactics 				

