



**CBPM**

Community-Based Prevention Marketing



# Develop a Strategic Plan

**6**

## CBPM for Policy Development Step 6 Facilitator Guide

Each step of Community Based Prevention Marketing for Policy Development includes a learning module on the CBPM Policy Development website, a corresponding Facilitator Guide, and resources and worksheets specific to the activities for each step. The training module and Facilitator Guide complement each other and provide the facilitator and the coalition with a comprehensive understanding of the purpose of each step as well as the resources to complete the activities for each step.

These Facilitator Guides were developed primarily to assist the facilitator by providing a lesson plan and activities to be completed by the coalition during each meeting. The corresponding training modules on the CBPM Policy Development website should also be viewed by the facilitator prior to the coalition meeting. The facilitator may then choose all or parts of the training module to share with the coalition. While some of the information provided in the website training modules may be helpful for the coalition, the decision to watch all or parts of the module—either as a group or separately before the coalition meeting—is for the facilitator to make, based on the needs of the coalition.

<b>Title</b>	Step 6: Developing a Strategic Plan
<b>Time</b>	4-6 hours
<b>Materials</b>	<p><b>Materials needed:</b></p> <p><b>Group</b></p> <ul style="list-style-type: none"> <li>• Display mechanism for eight steps in the CBPM for Policy Development process flowchart</li> <li>• Display mechanism describing Strengths, Weaknesses, Opportunities, and Threats</li> <li>• Learning Module: <i>The Marketing Plan: Developing a Data-Driven Strategy for Promoting the Policy</i></li> <li>• Interpretation of Findings worksheet from Step 5</li> <li>• Strategy Workbook</li> </ul> <p><b>Individual</b></p> <ul style="list-style-type: none"> <li>• Social Marketing Plan Outline</li> <li>• SWOT analysis worksheet</li> <li>• Budget template</li> <li>• Meeting evaluation worksheet</li> </ul> <p><b>Additional Resources:</b></p> <ul style="list-style-type: none"> <li>• For more information on creating an audience profile, see Plattner, H. (2010) D.School Bootcamp Bootleg. Palo Alto, CA: Institute of Design at Stanford: <a href="http://dschool.stanford.edu/wpcontent/uploads/2011/03/Boot">http://dschool.stanford.edu/wpcontent/uploads/2011/03/Boot</a></li> </ul>

	<p><a href="#">campBootleg2010v2SLIM.pdf</a></p> <ul style="list-style-type: none"> <li>For more information on framing, see FrameWorks' <i>Framing Public Issues Toolkit</i>, particularly Section III, p. 26-28 on "Metaphors and Simplifying Models":  <a href="http://www.frameworksinstitute.org/assets/files/PDF/FramingPublicIssuesfinal.pdf">http://www.frameworksinstitute.org/assets/files/PDF/FramingPublicIssuesfinal.pdf</a></li> </ul>
<b>Objectives</b>	<p>Upon completion of this step, coalition members will have:</p> <ol style="list-style-type: none"> <li>Created a positioning statement for the policy.</li> <li>Modified policy elements to optimize support.</li> <li>Identified the core benefits that the policy should offer priority audiences (Product Strategy).</li> <li>Identified ways to lower costs and barriers to supporting the policy (Pricing Strategy).</li> <li>Identified spokespersons and partners to engage decision makers and advocate for the policy (Placement Strategy).</li> <li>Identified agenda-setting tactics and communication guidelines (Placement Strategy).</li> <li>Identified information channels for communicating with priority audiences (Promotional Strategy).</li> <li>Identified other promotional activities for obtaining support (Promotional Strategy).</li> <li>Created a budget for advocacy activities.</li> </ol>

<b>Prior to meeting</b>	<b>Develop the Marketing Plan</b>
<b>Activity</b>	<ol style="list-style-type: none"> <li>Collaborate with the university partners and/or social marketing expert to prepare the Strategy Workbook, complete with the Social Marketing Plan outline, SWOT analysis worksheet, and budget template.               <ol style="list-style-type: none"> <li>This is a document that summarizes the research findings and related marketing questions corresponding to the Marketing Mix (4Ps) for each audience segment                   <ol style="list-style-type: none"> <li>Beneficiaries</li> <li>Stakeholders</li> <li>Decision-Makers</li> </ol> </li> <li>A Strategy Workbook template, Strategy Workbook example,</li> </ol> </li> </ol>

	<p>Social Marketing Plan (SMP) Outline, and budget template are provided in the Resources area. The <i>Interpretation of Findings</i> worksheet from Step 5 can serve as a basis for this work.</p> <p>2. Send an email to coalition members describing the purpose of the Step 6 meeting. Include the Strategy Workbook and SMP Outline.</p>
<p><b>Anticipatory Steps</b></p>	<ul style="list-style-type: none"> <li>• Step 6 is devoted to the development of an integrated marketing plan that will guide advocacy activities.</li> <li>• Show the Step 6 module from the training website to review the elements of the social marketing plan. The workbook is divided into the components of the marketing plan, with marketing questions and relevant research findings presented for each component. These components are: <ul style="list-style-type: none"> <li>○ <b>Audience profile</b> for key beneficiaries, stakeholders, and decision-makers to which the coalition will give greatest priority in their advocacy activities. For each key priority audience, develop a composite profile that includes the following: <ul style="list-style-type: none"> <li>▪ Key demographics</li> <li>▪ Interests and values aligned with your policy goals</li> <li>▪ Possible benefits to supporting the policy</li> <li>▪ Barriers to supporting the policy</li> <li>▪ Attitudes towards the policy issue</li> <li>▪ A typical day in the life of the audience segment</li> </ul> </li> <li>○ <b>Positioning Statement</b> (or framing the policy): How should the policy be packaged to give it a specific meaning, while discounting competing views? How can it be positioned to connect the issue to people’s values and influence how they interpret facts – who they blame for the problem, who they think is responsible for fixing the problem, and the types of solutions that seem most reasonable? What values, metaphors, symbols, messengers, pictures, or stories should be used to convey this position/frame in a powerful, memorable way?</li> <li>○ <b>Product strategy</b>: How should the policy be modified or structured to garner support and minimize resistance from priority audiences? What incentives could be added to make it more acceptable or attractive? Can a default option be selected that will increase compliance with the desired behavior? What do audience groups value most that the policy can provide them? What are the core benefits that this policy offers each audience that can be used to garner their support?</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ <b>Pricing strategy:</b> How can perceived costs or objections be minimized or made acceptable to priority audiences?</li> <li>○ <b>Placement strategy:</b> What organizations, leaders, or other partners can be enlisted to persuade decision makers to adopt the policy? Where and when should decision makers be engaged?</li> <li>○ <b>Promotional strategy:</b> What activities can be used to get the policy issue on the media agenda? What information channels should be used to communicate with beneficiaries and other priority audiences? What promotional activities should the coalition sponsor?</li> </ul> <ul style="list-style-type: none"> <li>● The Interpretation of Findings worksheet from Step 5, SMP Outline, SWOT analysis worksheet, and budget template will facilitate completion of the Strategy Workbook.</li> </ul>
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Instructional Input			
During the Meeting	Min	Activity	Objective
Procedure	240-360	1. The facilitator explains the purpose of the meeting, and notes that, due to the nature of the work, this step will require more time to complete than most of the other steps.	1,2
		<p>Section A</p> <ul style="list-style-type: none"> <li>a. The marketing expert introduces and briefly reviews the components of the Strategy Workbook with the coalition.</li> <li>b. The marketing expert describes the role research plays in developing an integrated marketing plan and reviews the basic components in the plan. <ul style="list-style-type: none"> <li>i. Refer to the Strategy Workbook example, Social Marketing Plan Outline, SWOT analysis worksheet, and budget template in the Resources area.</li> </ul> </li> </ul> <p>Section B</p>	

		<p>c. For each key audience segment, the marketing expert goes through the components in the plan, presenting the coalition with the marketing questions and corresponding research findings outlined in the Strategy Workbook.</p> <ul style="list-style-type: none"> <li>i. S/he facilitates a discussion of the research findings and guides the group in the development of a marketing plan.</li> <li>ii. During this process, coalition members review the Strategy Workbook and use research findings to make a series of decisions based on questions outlined in the workbook. These decisions will inform the marketing plan.</li> <li>iii. In real time during the meeting, the facilitator should produce a master document that reflects the marketing decisions made by the group.</li> </ul> <p>Section C</p> <p>d. Based on varying expertise and interests of the coalition, interested members form a subcommittee and use the Interpretation of Findings worksheet, Social Marketing Plan Outline, SWOT analysis worksheet, and budget template to develop an implementation plan to accompany the marketing plan. The implementation plan should:</p> <ul style="list-style-type: none"> <li>i. Identify tasks related to each marketing decision.</li> <li>ii. Designate the lead organization or coalition member for each task.</li> <li>iii. Set a deadline for completing the task and designates other coalition member or partners to help.</li> <li>iv. Identify budgetary obligations</li> </ul>	9
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		<p>associated with the tasks.</p> <p>e. Refer to the Social Marketing Plan Outline Section 7.0: Implementation Plan in the Resources area.</p>	
<b>Conclusion</b>	20-30	<ol style="list-style-type: none"> <li>1. The facilitator reviews the implementation plan, including the completed budget, with the group and makes adjustments as needed.</li> <li>2. The facilitator discusses the purpose of the next meeting and fields comments and concerns.</li> </ol>	N/A
<b>Measures of Progress</b>	<ul style="list-style-type: none"> <li>• Activity completion</li> <li>• Strategy Workbook completed</li> <li>• First draft of the implementation plan established</li> <li>• Budget established</li> </ul>		
<b>Note to Facilitator</b>	<p>Typically, an entire day is needed to develop a marketing plan for a specific set of priority audiences. Therefore, if you plan to seek support from multiple audiences, you may want to hold two or more half day sessions to develop marketing plans for specific groups. The people who attend each session may also vary depending on the diversity within the coalition. In some cases, you may also want to invite people who have not been part of the coalition but will be important to your success in reaching a specific group.</p> <p>The strategy formation process can be daunting for coalition members. Breaks should be taken so as not to tire coalition members. The coalition leader should be prepared to refocus the coalition members if they get too far off topic. Efforts should also be made to provide coalition members with a succinct summary of what has been learned from Steps 1-5 in advance of the strategy formation meeting so that coalition members are prepared for the session.</p>		