10 STEPS FOR DEVELOPING A

STRATEGIC SOCIAL MARKETING PLAN

Step 1: Describe the Social Issue, DEI Considerations, Organization(s), Background, Purpose, and Focus of Your Plan

1.1 Briefly identify the social issue, sometimes referred to as the “wicked problem,” your plan will be addressing (e.g., gun violence, youth suicide, air pollution, water contamination, homelessness, voting).

1.2 Note any Diversity, Equity, and Inclusion (DEI) considerations relevant to the social issue being addressed.

1.3 Identify the organization(s) involved in developing and implementing the plan.

1.4 Summarize key *background* information leading to the development of this plan, ideally using reliable statistics (e.g., percent decrease in salmon populations).

1.5 What is the *purpose of this effort*, the intended impact (e.g., reduced teen pregnancies, increased protection of salmon habitats)?

1.6 What is the plan’s *focus*, the approach you will be using to contribute to your plan’s purpose (e.g., residential gardening practices)? Areas of focus may be solution-oriented (e.g., soft shore buffers), population-based (e.g., homes on streams), or product-related strategies (e.g., native plants).

Refer to Chapter 5 for a detailed description of the process.

Step 2: Conduct a Situation Analysis

**(Identify Two to Three Bullet Points for Each)**

Organizational Factors: Organizational Resources, Service Delivery Capabilities, Expertise, Management Support, Issue Priority, Internal Publics, Current Alliances and Partnerships, Past Performance

2.1 What organizational *strengths* will your plan maximize?

2.2 What organizational *weaknesses* will your plan minimize?

External Forces: Cultural, Technological, Demographic, Natural, Economic, Political/Legal, External Publics

2.3 What external *opportunities* will your plan take advantage of?

2.4 What external *threats* will your plan prepare for?

Prior and Similar Efforts

2.5 What findings from *prior and similar efforts* are noteworthy, those of yours and others?

Refer to Chapter 5 for a detailed description of the process.

Step 3: Select Priority Audiences

3.1 Describe the *priority audience* for your program/campaign in terms of size, problem incidence and severity, and relevant variables, including demographics, psychographics/values and lifestyles, geographics, related behaviors, and/or readiness to act (e.g., homeowners on shoreline properties engaged in landscaping and interested in protecting the environment).

3.2 If you have *additional important audiences* that you will need to influence as well, describe them here, to keep them in mind as you develop strategies. They may end up being messengers or distribution channels (e.g., garden centers and nurseries).

Refer to Chapter 6 for a detailed description of the process and Worksheet A in this Appendix.

Step 4: Set Behavior Objectives and Target Goals

Objectives

4.1 *Behavior Objective*:

 What, very specifically, do you want to influence your priority audience to *do* as a result of this campaign or project (e.g., plant native plants)?

4.2 *Knowledge Objective*:

 Is there anything you need them to *know* in order to be more likely to act (e.g., how to identify native plants at the nursery)?

4.3 *Belief Objective*:

 Is there anything you need them to *believe* in order to be more likely to act (e.g., native plants can be beautiful and easier to maintain)?

Goals

4.4 What quantifiable, measurable goals are you targeting? Ideally, these are stated in terms of *behavior change* (e.g., increase in sales of native plants). Other potential target goals are campaign awareness, recall, and/or response and changes in knowledge, belief, or behavior intent levels.

Refer to Chapter 7 for a detailed description of the process and Worksheet B in this Appendix.

Step 5: Identify Priority Audience Barriers, Benefits, and Motivators; the Competition; and Influential Others

Barriers

5.1 Make a list of *barriers* your priority audience may have to adopting the desired behavior. These may be related to something, physical, psychological, cultural, economic, skills, knowledge, awareness, or attitudes. (Try for a list of 5 to 10.)

Benefits

5.2 What are the key *benefits* your priority audience wants in exchange for performing the behavior (e.g., a yard that’s easier to maintain and increased wildlife on their property)? This answers the question “What’s in it for me?” (Try for a list of 2 to 3.)

Motivators

5.3 What does your priority audience say will make it more likely that they would do the behavior? Ask them if there is something you can *give* them, *say* to them, or *show* them that would help them (e.g., an easy way to know which nurseries sell native plants and to identify plants at the nursery).

Competition

5.4 What are the major competing *alternative behaviors* (e.g., planting nonnative plants)?

5.5 What *benefits* do your audiences associate with these behaviors (e.g., easier to find)?

5.6 What *costs* do your audiences associate with these behaviors (e.g., requires more fertilizing)?

Influential Others

5.7 Relative to the desired behavior, who does your priority audience listen to, watch, and/or look up to?

5.8 What do you know about what these midstream audiences are currently saying and doing regarding the desired behavior (e.g., staff at nurseries)?

Refer to Chapter 8 for a detailed description of the process and Worksheet C in this Appendix.

Step 6: Develop a Positioning Statement

Positioning Statement

6.1 Write a statement similar to the following, filling in the blanks:

 “We want [PRIORITY AUDIENCE] to see [DESIRED BEHAVIOR] as [ADJECTIVES, DESCRIPTIVE PHRASES, SET OF BENEFITS, OR HOW THIS BEHAVIOR IS BETTER THAN THE COMPETITION]” (e.g., “We want shoreline property owners engaged in landscaping to see native plants as beautiful, easy to find, less hassle to maintain, and a way to protect water quality and wildlife habitats.”).

Refer to Chapter 9 for a detailed description of the process.

Step 7: Develop Marketing Strategies

7.1 Product: Creating the Product Platform

7.1.1 *Core* Product: What is the major perceived benefit your priority audience wants from performing the behavior that you will highlight? (Choose one or a few from those identified in 5.2.)

7.1.2 *Actual* Product: What, if any, tangible goods and services will you be offering and/or promoting (e.g., 100 native plants to choose from, fruits and vegetables, life vests, blood monitoring equipment, low-flow showerheads, 988 mental health hotline)?

7.1.3 *Augmented* Product: Are there any additional tangible goods or services that would assist your priority audience in performing the behavior (e.g., workshop on designing a native plant garden)?

Refer to Chapter 10 for a detailed description of the process.

7.2 Price: Fees and Monetary and Nonmonetary Incentives and Disincentives

7.2.1 If you will be including tangible goods and services in your campaign, what, if anything, will the priority audience have to *pay* for them (e.g., cost of native plants, life vests)?

7.2.2 Describe any *monetary incentives* for your priority audience (e.g., coupons, rebates).

7.2.3 Describe any *monetary disincentives* you will highlight (e.g., fines, increased taxes, higher prices for competing products).

7.2.4 Describe any *nonmonetary incentives* (e.g., pledges to have toddlers wear a life vest on the beach).

7.2.5 Describe any *nonmonetary disincentives* (e.g., negative visibility, a website with photos of properties where migratory birds have disappeared).

Refer to Chapter 11 for a detailed description of the process.

7.3 Place: Develop the Place Strategy

As you determine each of the following, look for ways to make locations closer and more appealing, to extend hours, and to be there at the point of decision making.

7.3.1 *Where* will you encourage and support your priority audience to *perform the desired behavior* and *when*?

7.3.2 *Where* and *when* will the priority audience acquire any related tangible goods?

7.3.3 *Where* and *when* will the priority audience acquire any associated services?

7.3.4 Are there any groups or individuals in the distribution channel that you will engage to support efforts (e.g., nursery owners and their staff)?

Refer to Chapter 12 for a detailed description of the process.

7.4 Promotion: Decide on Messages, Messengers, Creative Strategies, and Communication Channels

7.4.1 *Messages*: What key messages do you want your campaign to communicate to priority audiences?

7.4.2 *Messengers:* Who will deliver the messages and/or be the perceived sponsor?

7.4.3 *Creative Strategies*: Summarize, describe, or highlight elements such as logos, taglines, copy, visuals, colors, script, actors, scenes, and sounds in broadcast media.

7.4.4 *Communication Channels*: Where will messages and creative elements appear?

Refer to Chapter 13 for a detailed description of the process.

Step 8: Develop a Plan for Monitoring and Evaluation

8.1 What is the *purpose* of this evaluation? Why are you doing it?

8.2 For *whom* is the evaluation being conducted? To whom will you present it?

8.3 *What inputs*, *outputs*, *outcomes*, *and impact* will be measured?

8.4 *What* *techniques and methodologies* will be used to conduct each of these measurements?

8.5 *When* will these measurements be taken?

8.6 *How* much will this cost?

Refer to Chapter 14 for a detailed description of the process and Worksheet D in this Appendix.

Step 9: Establish Budgets and Find Funding Sources

 9.1 What costs will be associated with *product*-related strategies?

 9.2 What costs will be associated with *price*-related strategies?

 9.3 What costs will be associated with *place*-related strategies?

 9.4 What costs will be associated with *promotion*-related strategies?

 9.5 What costs will be associated with *evaluation*-related strategies?

 9.6 If costs exceed currently available funds, what potential additional funding sources can be explored?

It should be noted that formative research costs are not included in this plan. It is included in plan development costs. Costs in Step 9 are ones associated with Plan implementation. Refer to Chapter 15 for a detailed description of the process.

Step 10: Complete an Implementation Plan

10.1 Sample Implementation Plan

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| --- | --- | --- | --- |
| What | Who | When | How much |
|  |  |  |  |
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10.2 If you are conducting a pilot or plan with several phases, complete a grid for each phase.

Refer to Chapter 16 for a detailed description of the process. For an electronic version of this plan, visit www.socialmarketingservice.com.

Worksheet A

Selecting Priority Audiences

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1Potential Priority Audiences | 2Size | 3Problem Incidence | 4Readiness to Act | 5Ability to Reach | 6Match for the Organization | 7Average Score(From 2, 3, 4, 5) |
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1. **POTENTIAL PRIORITY AUDIENCES:** Relative to a campaign purpose (e.g., improve water quality) and focus (e.g., yard care), brainstorm and then list potential priority audiences. A priority audience is a segment of a population that has similar characteristics. Potential audiences may be grouped based on one or more variables, including demographics, geographics, values and lifestyles, or current related behaviors (e.g., homeowners with large lawns).

2. **SIZE:** As a segment of a population, what is the actual or relative size of this segment?

3. **PROBLEM INCIDENCE:** How significant is the contribution that this audience makes to the problem this plan is addressing (e.g., shoreline properties or frequency of fertilizing)?

4. **READINESS TO ACT**: How concerned is the priority audience with the problem issue/behavior?

5. **ABILITY TO REACH:** Can you identify this audience, and do you have efficient ways to reach them?

6. **MATCH FOR THE ORGANIZATION:** Does this audience support your organizational mission, expertise, and positioning?

7. **AVERAGE SCORE:** This can be a “weighted average” to give increased significance to one or more of the items, or it can be an “unweighted average,” with each aspect being considered equally important.

A variety of scales have been used to rank these items: (a) high, medium, low; (b) scale of 1 to 10, (c) scale of 1 to 7, (d) scale of 1 to 5. The one used will depend on how much verifiable information is available.

Worksheet B

Prioritizing Behaviors

**PRIORITY AUDIENCE** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| --- | --- | --- | --- | --- | --- | --- |
| 1Potential Behaviors to Rank | 2Impact on the Social Issue | 3Willingness of Priority Audience to do this Behavior | 4Measurability | 5Market Opportunity | 6Market Supply | 7Average Score(From 2, 3, 4, 5, 6) |
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1. **POTENTIAL BEHAVIORS TO RANK:** Relative to a campaign purpose, focus, and priority audience, brainstorm and then list potential single, simple behaviors to promote (e.g., replacing half of lawn with native plants).

2. **IMPACT ON THE SOCIAL ISSUE:** What potential impact do scientists, technical staff, and/or engineers determine that this desired behavior will have on the environment relative to other behaviors (e.g., using natural vs. chemical fertilizers vs. reducing lawn in half)?

3. **WILLINGNESS:** How willing is the priority audience to do this? In the diffusion model, this would be the percentage or number or relative size who are in the *Help Me* group versus the *Show Me* or *Make Me* group.

4. **MEASURABILITY:** Can the behavior be measured through either observation, record keeping, or self-reporting?

5. **MARKET OPPORTUNITY**: Estimate the percentage and/or number of people in the priority audience/population who are not already doing the behavior. (Note: The higher the number, the higher the score.)

6. **MARKET SUPPLY:** Does the behavior need more support? If some other organization or organizations are already addressing this behavior, perhaps a different behavior would be more beneficial to the social issue.

7. **AVERAGE SCORE:** This can be a “weighted average,” to give increased significance to one or more of the items, or it can be an “unweighted average,” with each aspect being considered equally important.

A variety of scales have been used to rank these items: (a) high, medium, low, (b) scale of 1 to 10, (c) scale of 1 to 7, (d) scale of 1 to 5. The one used will depend on how much verifiable information is available.

(Adapted from Doug McKenzie-Mohr, www.cbsm.com.)

Worksheet C

Marketing Intervention Tolls: Using the 4Ps to Reduce Barriers and Increase Benefits, Inspired by Audience Motivators

**Desired Behavior:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Priority Audience:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| For each of the priority audience’s perceived barriers and potential benefits, consider whether one or more of the 4Ps would help reduce the barrier and provide desired benefits. | Potential Strategies Using the 4Psto reduce barriers and increase benefits |
|  | PRODUCTGoods or services to promote or to provide to help the audience do the behavior |  PRICEIncentives and disincentives (includes use of pledges and commitments) | PLACEWhere goods and services can be accessed or behavior will be performed | PROMOTIONMessages, messengers, creative strategies, and communication channels (includes use of prompts) |
| **Perceived Barriers to Desired Behaviors** |  |  |  |  |
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| **Desired Benefits** |  |  |  |  |
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**WORKSHEET FOR POTENTIAL EVALUATION MEASURES**

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| --- | --- | --- | --- | --- |
| **INPUTS** | **OUTPUTS** | **OUTCOMES** | **IMPACT** | **RETURN ON INVESTMENT** |
| *Resources allocated to the campaign or program effort:** Dollars
* Incremental staff time
* Existing materials
* Existing distribution channels
* Existing partners
 | *Program activities conducted to influence a desired behavior. These measures do not indicate whether the audience "noticed" or responded to these activities. They only represent what was "put out there" including:** Number of materials disseminated
* Number of calls made
* Numbers and types of distribution channels for any products or services
* Number of events held
* Web sites created/utilized
* Social media tactics
* Reach and frequency of communications
* Free media coverage
* Paid media impressions
* Implementation of program elements (e.g., whether on time, on budget)
 | *Audience response to outputs including:** Changes in behavior
* Changes in numbers of related products or services "sold" (e.g., native plants)
* Changes in behavior intent
* Changes in knowledge
* Changes in beliefs
* Responses to campaign elements (e.g., hits to a Web site)
* Campaign awareness
* Customer satisfaction levels
* Policy changes
* Partnerships and contributions created
 | *Indicators that show levels of impact on the social issue that was the focus for the effort:** Water quality improved
* Wildlife and habitats protected
 | *Economic value of changes in behavior and the calculated rate of return on the spending associated with the effort:** For every dollar spent, dollars saved or generated
* After subtracting expenses, what is the rate of return on the investment
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|  |  |  |  |  |