

Community-Based Prevention Marketing

Step 6: Develop a Strategic Plan

Full Transcript

Introduction

This step, titled "Develop a Strategic Plan," features the development of an integrated strategic plan that will guide advocacy and implementation activities. Based on information gathered for each audience segment during step 5, coalition members will build a plan that results in the adoption of the policy and policy practices for priority audiences. A marketing plan will be developed that establishes product, pricing, placement, and promotion strategies for each audience segment explored in step 5. In addition, step 6 is also the time to make a budget and start thinking about a plan for implementation, and for monitoring and evaluation of advocacy activities. In this step, your coalition will rely heavily on the university partner for specialized support. Having a partner with social marketing expertise is especially important for step 6.

Strategy Development

Before we begin, let's gain an understanding of the strategy development process from Carol Bryant, Director of the Florida Prevention Research Center at the University of South Florida's College of Public Health.

VIDEO: Carol Bryant, Director of the Florida Prevention Research Center, College of Public Health, University of South Florida. Video Title: "Strategy Development."

Objectives

By the end of this step, you will be able to:

- create a positioning statement for the policy,
- identify the core benefits that the policy offers priority audiences,
- identify ways to lower costs and barriers to supporting the policy,
- identify spokespersons to engage decision makers and advocate for the policy,
- identify agenda-setting tactics and communication guidelines,
- identify information channels for communicating with priority audiences,
- create a budget for advocacy activities and implementation,
- and consider a plan for monitoring and evaluation.

The Marketing Plan

The Marketing Plan consists of several components:

- the Positioning Statement, which is benefit-focused,
- the Product Strategy, which focuses on maximizing value to the consumer,
- the Pricing Strategy, which aims to minimize costs to the consumer,
- the Placement Strategy, which creates partnerships in key locations,
- and the Promotional Strategy, which promotes and advocates change.

For more information about each of these components, click the folder tabs above. To review this overview at any time, click the binder clip on the right.

Positioning Statement

To begin, the coalition will craft three positioning statements for framing the policy - one for each of the priority audience groups. These positioning statements should align with and guide decision-making as the coalition develops the strategy-based marketing plan.

Social marketers suggest developing the positioning statement by filling in the blanks of the following phrase:

“We want [PRIORITY AUDIENCE] to see [DESIRED BEHAVIOR] as [DESCRIPTIVE PHRASE] and as more important and beneficial than [COMPETITION].”

Note that this positioning statement is for internal use only; this is meant as a frame of reference for the coalition when developing the strategies that comprise the marketing plan.

Click "Show Example" to view the positioning statement the Lexington coalition created for corner store owners.

Positioning Statement Example

“We want [corner store owners] to see [stocking fresh fruits and vegetables] as [more sought-after/marketable] and beneficial than [stocking only high calorie packaged food].”

Product Strategy

Social marketers believe new policies and practices should provide a solution to problems consumers consider important and offer them benefits they truly want. The goal of product strategy is to identify the benefits that priority audiences receive from adopting recommended changes.

The product strategy allows the coalition to maximize:

- the benefits that each audience segment receives from engaging in desired actions,
- and opportunities to enact the recommended policy.

In developing the product strategy, it's important for your coalition to keep in mind that while the desired outcome is the change we want them to make, it's also desirable to each of the three audience groups, because it's a better outcome than what their current situation provides. For example, it's worth pointing out to the beneficiaries of an obesity prevention initiative that an apple can be as fast and inexpensive as a bag of chips or a chocolate bar, but it provides a healthier option over the alternatives.

Click the yellow document titled "Questions to Ask" to learn how to get started with this strategy.

Product Strategy Questions

Keeping in mind the information gathered in Step 5, the coalition must make decisions about the product strategy to maximize the benefits for each audience. In order to guide discussion and decision-making in the development of a meaningful product strategy, you must first ask the right questions. Here are some of the questions the Lexington coalition developed to ask the neighborhood corner store owners, a stakeholders group. You can adapt these questions to meet the needs of your coalition's local context and chosen policy.

- How will store owners benefit if they adopt the new policies being promoted? What would they get from the change that would make their lives better?
- Which benefit would make the new policies or practices a better choice than what they are currently doing? What can we do to ensure they truly benefit in this way?
- Which foods should be added to their inventory? What other business practices can enhance access to healthy foods?
- What policies or practices will motivate store owners?

Refer to the worksheets from step 5, which can be found in the resources area, to help you develop marketing questions for this step.

Pricing Strategy

Along with the product strategy, a pricing strategy should be developed. In social marketing, price refers to the psychological, social, and financial costs that consumers exchange for product benefits. The goal of the pricing strategy is to identify the costs or barriers a particular audience segment may encounter and develop strategies for helping them overcome those barriers. A good pricing strategy will minimize the monetary and non-monetary costs of adopting the policy for each audience segment. Click the papers below to learn more about each type of cost. Click "Questions to Ask" for questions to help you build your pricing strategy.

Monetary Costs

Monetary costs can be expenses incurred due to tangible objects or services. These include the cost of objects, such as condoms, bike helmets, and booster seats, and fees associated with services, such as fitness clubs, parenting classes, and transportation fees, such as bus fare.

Non-Monetary Costs

Non-monetary costs can be the time and effort required, and the psychological or physical discomfort that may result, from a particular action. Examples of the cost of time and effort include cooking with fresh vegetables and exercising after work. Examples of psychological discomfort include smoking cessation and talking to your teenager about bullying. Examples of physical discomfort include medical exams and exercise. These are all potential costs of making a change.

Pricing Strategy Questions

To develop a meaningful pricing strategy for each audience segment, ask questions that will guide discussion and decision-making. Using the information they had already gathered, the Lexington coalition asked the following questions to define the pricing strategy for corner store owners.

- What policies can help owners acquire fresh food products at lower costs?
- How can local residents be encouraged to shop at neighborhood stores?
- How can food spoilage be reduced to avoid financial losses?
- What other policies could help lower the costs or barriers that deter store owners from offering healthy items?

The Placement Strategy

“Placement” refers to the location where products or services are available and the time or place where the changes occur. The goal is to develop strategies to make it easier and more convenient for key audiences to adopt the policy initiative. With a placement strategy, the coalition will have identified spokespersons and partners to circulate information about policy enactment in strategic locations and reinforce the proposed actions.

As part of their placement strategy, the Lexington coalition installed healthy food racks in neighborhood corner stores in order to provide ready access to healthy foods.

Click "Questions to Ask" for placement strategy questions.

Placement Strategy Questions

With the information gathered in Step 5 as a guide, the coalition must make decisions about the placement strategy. Ask targeted questions to guide discussion and decision-making in the development of a meaningful placement strategy for each audience segment. In Lexington, the

coalition asked the following questions to define the placement strategy for corner store owners, a stakeholders group.

- What are owners willing to do to make their corner stores a place more people would shop?
- How can partner organizations and individuals work with stores and distributors to bring healthier foods to store owners?
- Which partners can help owners make their stores more conducive to use by neighborhood residents?

Promotional Strategy

The promotional strategy includes guidelines for designing effective, attention-getting messages; selecting appropriate information channels; and identifying promotional activities to persuade audience segments to adopt the policy initiative. The goal is to promote policy enactment and the associated actions in a manner that is relevant, appealing, and accessible for all the stakeholders.

The promotional strategy includes four major elements: the message, the messengers, the creative strategy, and the communication channels. Click on the blue post-its for a brief description of each.

The message is what you want your target audience to do, know, or believe.

The messengers are those people who support the effort and will deliver your message.

The creative strategy is how you will “sell” your message.

The communication channels are where and when your message will appear.

Click “Questions to Ask” for questions to help you build your promotional strategy.

Promotional Strategy Questions

As with the previous steps, use the information gathered in step 5 to answer key questions that will help guide your promotional strategy.

In Lexington, the coalition developed the following marketing questions for corner store owners:

- What type of messages would motivate owners to make affordable and healthy foods available in a consumer friendly environment? What will get their attention? What tone is most effective?
- What information channels are effective in communicating with owners?
- What types of educational or promotional materials would be effective?

- What spokesperson would they trust?
- What types of activities could motivate them to change?

Before the Meeting: The Strategy Workbook

Before the coalition meets, the research team and marketing expert prepare the strategy workbook. The outline for this workbook is included in the resource area. An example of the final workbook created by the coalition in Lexington is also included under resources. Use the outline and the example to help you work through Step 6. The workbook is divided into the components of the marketing plan, with marketing questions and relevant research findings presented for each audience profile. The profiles for each audience group - beneficiaries, stakeholders, and decision-makers - should include the following:

- key demographics
- interests and values aligned with your policy goals
- possible benefits to supporting the policy
- barriers to supporting the policy
- attitudes towards the issue
- a typical day in the life of the specific audience segment

Before the Meeting: Other Plans

In addition to completing the strategy workbook, the coalition will also prepare a budget plan.

A simple budget template in Excel with pre-built formulas has been included under the resources tab for help thinking through this step. The completed budget plan can be included with the strategy workbook.

You will also want to begin to consider a plan for monitoring and evaluating the coalition's advocacy efforts and implementation of any policy that may result. Step 7 will go into more detail about why it's important and helpful to plan for monitoring and evaluation.

During the Meeting: The Marketing Plan

Now that the coalition has a strategy workbook, complete with the marketing plan outline and budget, the marketing expert can describe the role research plays in developing an integrated marketing plan and review the basic components of the plan. For each audience segment, the marketing expert will go through the components of the plan, presenting the coalition with a set of marketing questions and corresponding research findings from step 5. The marketing expert will facilitate a discussion of the research findings and guide the group in developing the marketing plan. During this process, coalition members will review the strategy workbook and use research findings to answer a series of marketing questions that will inform the marketing plan. In real time during the meeting, the facilitator should produce a master document that reflects the marketing decisions made by the group.

During the Meeting: Other Plans

Also during the meeting, the coalition can form a sub-committee to develop an implementation plan to accompany the marketing plan. The implementation plan designates the lead organization or coalition members for each task, sets a deadline for completing the tasks, and designates other coalition members or partners to help.

Social marketers describe marketing implementation as turning marketing strategies into actions that meet strategic marketing objectives. Keeping this in mind, your implementation plan should answer the following questions:

- What will we do? This includes activities necessary to carry out strategies identified in the marketing mix for each audience segment.
- Who will be responsible? For each major effort, identify individuals and organizations responsible for strategy implementation.
- When will it be done? Establish timeframes for each major activity.
- How much will it cost? Complete your budget by identifying expenses related to each activity.

Remember to reference the social marketing plan outline worksheet and the budget template, located in the resources section, to guide you in developing your integrated strategic plan.

Note to Facilitator

Typically, an entire day is needed to develop a marketing plan for just one 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 each of the 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.

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.

Moving to the Next Step

Congratulations on completing this learning module! You are now ready to move to step 7 titled, "Monitor and Evaluate."