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***Four step Social Marketing***

***Planning Guide***

***Plan Overview***

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**Scoping Stage and scoping report:**

**1.0    The rationale:**

* + Sets out why action is needed on the identified social issue, the target audience and why they have been selected. Sets the action in the relevant policy context and within the overall strategic objectives of the project sponsor /s.
* **2.0    Situation Analysis** 
  + SWOT:  Organizational Strengths & Weaknesses and Environmental Opportunities & Threats
  + Competition analysis/ Force Field analysis: List and assign weight to factors influencing adoption of the behavior including positive enabling factors and barriers to change.
  + Literature review , what we know about how to tackle the issue
  + Environmental scan of programs focusing on similar efforts: activities & lessons learned
  + Asset mapping: recording of all social assets including: social networks, community assets, stakeholder analysis
* **3.0    Target Audience Profile** 
  + Size of target audience
  + Primary audience ( first priority, secondary audiences and tertiary audiences ( These can often be intermediaries)
  + Data analysis including : service up take data, demographics, geographics, relevant behaviors (including risk),
  + Target audience insight, developed form qualitative and quantitative target audience research and psychographics.

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* **4.0    Intervention Proposition**
  + Set out how and why the exchange in relation to the behavior change will be positioned with the target audience, how the benefits be maximized and costs reduced.
  + In the case of non-rational choice situations set out how the choice environment will be structured, or what , policy or service transformation be introduced
* **5.0 Initial Marketing Objectives** 
  + Cognitive objectives : measuring knowing
  + Affective objectives: measuring beliefs and attitudes
  + Psychomotor :measuring behavior

NOTE: OBJECTIVES SHOULD BE: **SMART: Specific, Measurable, Achievable, Relevant, Time bound**

**Testing stage and report:**

* **6.0    Marketing intervention Mix Strategies** 
  + Which combination of the five intervention types will be used: 1 Inform, 2 Educate, 3 Support, 4 Control, 5 Design and how the 4 P’s of marketing will be applied:
  + Also set out what ‘Form’ of intervention wil be used:
    - Hug: High cognitive choice with a positive reward
    - Nudge: Low cognitive engagement with a positive reward
    - Shove Low cognitive engagement with a penalty
    - Smack: High cognitive engagement with a penalty

It can also be useful to think about: Product: the actual benefit people get form adopting the behaviour and also the physical objects or services offered to assist adoption. Price: Costs that will be associated with adopting the behavior and how they will be reduced and what Incentives and Disincentives will be used. Place, ensuring convenient access, opportunities to engage and attractiveness. Promotion, how the desired behavior will be promoted and through which channels.

* **6.2 Pre testing and piloting** 
  + Methods used to test the interventions & timetable and plan for the pilot
* **6.3 Report on the impact of the pilot programme** 
  + Reporting on impact, outcome, return on investment and efficiency
* **6.4 Full business plan setting out** 
  + Final SMART objectives for the programme
  + Recommended intervention and marketing mix
  + Anticipated impact over designated time frame
  + Resources required from main sponsors , partners and stakeholders
  + How the budget will be applied
  + How stakeholder and partners will be engaged
  + Programme management and governance.

**Enact**

* **10.0    Plan for Implementation the programme including**
  + Programme time frame and key mile stones
  + Recommended intervention mix and marketing mix
  + Resources allocation to elements of the intervention and marketing mix
  + Stakeholder and partner management plan
  + Programme management and reporting plan,
  + Evaluation and monitoring plan

**Learn and Act**

**11.00 Evaluate and report**

* Report to sponsors, stakeholders and partners
* Report to target audiences
* Report to professional audiences
* Record learning and share findings
* Review and build in learning to next wave of implementation

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***My Social Marketing Pan***

**Scoping Stage and scoping report:**

1. **The rationale:**

**Why action is needed**

(Problem statement)

**Target audience selection** (Why selected)

**Need / Problem to be addressed**

**Seriousness**

**Social, economic health, wellbeing drivers**

**Policy driver**

**Ability to intervene**

**Numbers involved**

* **2.0    Situation Analysis** 
  + SWOT:  Organizational Strengths & Weaknesses and Environmental Opportunities & Threats

**Strengths** in dealing with the issues,

**Weaknesses**, in dealing with this challenge

**Opportunities:**

**Threats,** issues that may make the situation worse)

**Competition / Force Field analysis**

(List possible factors, individual, organisations that may be promoting the problem behaviour or not supporting the positive behaviour you want to encourage, and then set out possible strategies for reducing this influence)

**Competitor Possible action to reduce influence**

**Factors influencing the behaviour:**

**Barriers**

**Enabling factors**

(Give a weighting of 1 low – 5 high for each)

**Literature review and field experience**.

Summary of what is known from the literature about effective interventions).

**Asset mapping**

(List all current resources that could be brought to bear on the behaviour including organisations, individual’s physical assets, services, budget, research capacity etc.)

* **3.0    Target Audience Profile**

**Size of target audience**

**Primary audience**

(The behaviour you wish to influence)

**Secondary audience**

(People who directly influence the primary target audience behaviour)

**Tertiary audience**

(People who indecently influence the primary of secondary audience behaviour)

**Summary of key available data**

(Demographics, service use, uptake, risk taking etc.)

**Target audience insight**

(Derived from qualitative and quantitative research about beliefs, attitudes and knowledge)

**Primary abidance**

**Secondary audience**

**Tertiary audience**

* **4.0    Intervention Proposition**

**How the exchange will be positioned with the target audiences,**

(How the benefits will be set out and how the costs will be reduced)

**Benefits** (How they will be reduced or increased)

**Costs** (How they will be reduced or increased)

**Non rational choosing**

(In the case of non-rational choice situations set out how the choice environment will be structured, or what, policy or service transformation be introduced)

* **5.0 Initial Marketing Objectives**

**List your objectives**

**Cognitive objectives:**

**Affective objectives:**

**Psychomotor objectives:**

NOTE: OBJECTIVES SHOULD BE: **SMART: Specific, Measurable, Achievable, Relevant, Time bound**

**Testing stage and report:**

* **6.0    Marketing intervention Mix Strategies**

**Set out which combination of the five intervention types will be used and which of the four forms of intervention will be used (Nudge, Hug, Smack, and Shove):**

**Inform (Nudge, Hug, Smack, Shove):**

**Educate (Nudge, Hug, Smack, Shove):**

**Support (Nudge, Hug, Smack, Shove):**

**Design (Nudge, Hug, Smack, Shove):**

**Control (Nudge, Hug, Smack, Shove):**

**Set out how the marketing mix will be used to help change behaviour:**

**Product**

The actual benefit people get from the change in behaviour. Can also include the objects or services offered to assist adoption.

**Price**

The costs that will be associated with adopting the behavior and how they will be reduced and what Incentives and or disincentives will be used.

**Place**

Ensuring convenient access, opportunities to engage and attractiveness.

**Promotion**

How the desired behavior will be promoted, what channels and methods will be used.

* **6.2 Pre testing and piloting**

**Methods that will be used to test the interventions**

(Include timetable and plan for the pilot)

* **6.3 Report on the impact of the pilot programme**

**How the pilot programme will report on impact, outcome, return on investment and efficiency.**

* **6.4 Full business plan setting out**

**Final SMART objectives for the programme**

**Recommended intervention and marketing mix**

**Anticipated impact over designated time frame**

**Resources required from main sponsors, partners and stakeholders**

**How the budget will be applied**

**Intervention Time frame Budget**

**How stakeholder and partners will be engaged**

**Programme management and governance**

**Enact**

* **10.0    Plan for Implementation the programme including**

**Programme timeframe and key mile stones**

**Final intervention mix and marketing mix**

**Resources allocation to elements of the intervention and marketing mix**

**Stakeholder and partner management plan**

**Programme management and reporting plan**

**Evaluation and monitoring plan**

**Learn and Act**

**11.00 Evaluate and report**

**How you will report to sponsors, stakeholders and partners to target audiences**

**How you will report to professional audiences**

**How you will record learning and share findings**

**How you will review and build in learning to next wave of implementation**

**Additional notes notes**