

# Using an Innovative Computer Based Social Marketing Planning Tool to Address Public Health Issues:

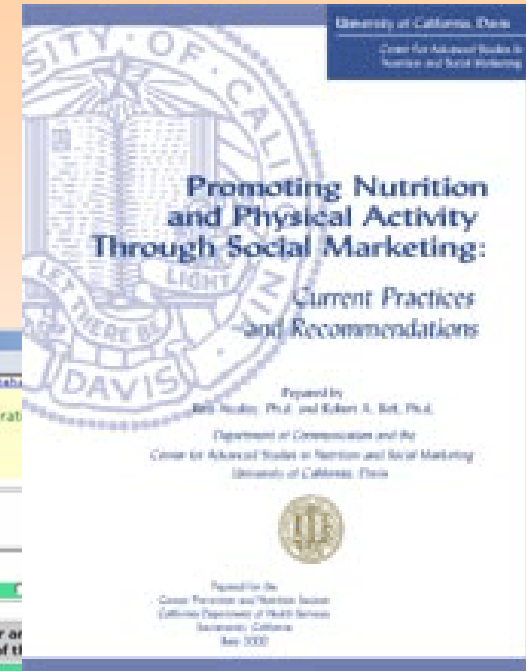
***CDCynergy-Social Marketing Edition  
Version 2.0***

## **USDA Food Safety Education Conference**

Denver, Colorado

*September 28, 2006*

# Want to do Social Marketing...?



Audience Behavior Prioritization Wizard - netscape

Step 3 - Rate Each Audience/Behavior.  
Directions: The default rating for each audience/behavior and factor is 3. Adjust the rating and review the ranking and scores.

Rate this audience/behavior:  
**Chitlin Preparers/Soak chitlins in bleach solution**

Behavioral Feasibility: The barriers associated with this proposed behavior are likely to be adopted by a significant percentage of the target audience.

|                       |                       |                       |                                  |                       |
|-----------------------|-----------------------|-----------------------|----------------------------------|-----------------------|
| Strongly Disagree     | Disagree              | Neutral               | Agree                            | Strongly Agree        |
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |

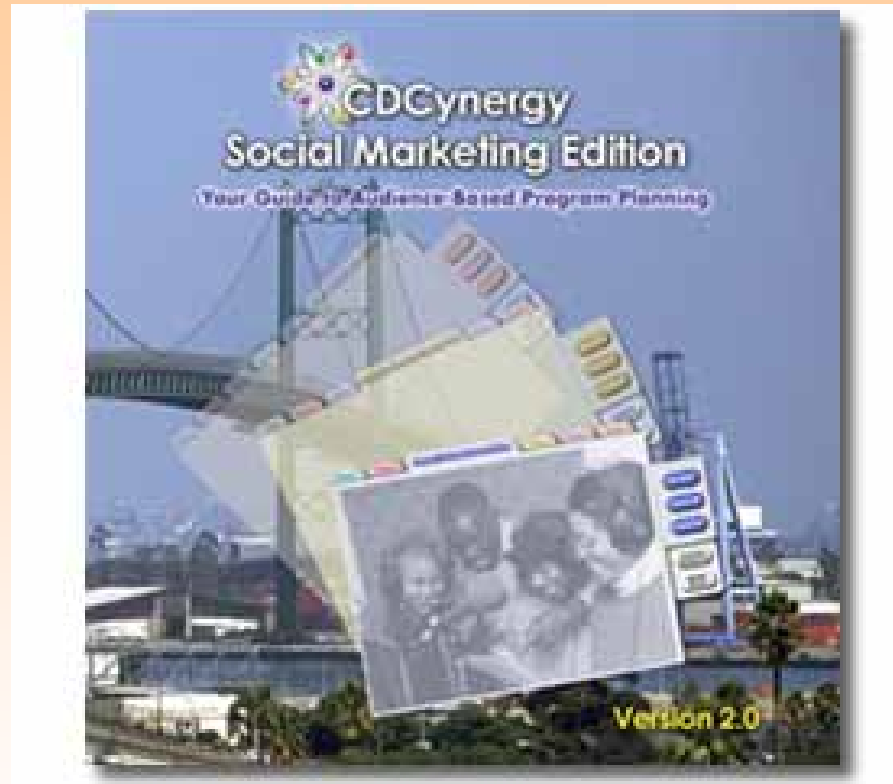
Political Feasibility: Both my organization and the community will support this audience/behavior pair choice.

|                       |                       |                       |                                  |                       |
|-----------------------|-----------------------|-----------------------|----------------------------------|-----------------------|
| Strongly Disagree     | Disagree              | Neutral               | Agree                            | Strongly Agree        |
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |

Done Rating This Audience/Behavior

Turning Point

# *Need Help...?*



# The Agenda

- Background: Turning Point; the *CDCynergy* concept
- *CDCynergy-SOC*: Formative research and product development
- *CDCynergy-SOC*: Exploration of the tool



# Turning Point Social Marketing National Excellence Collaborative

- Robert Wood Johnson Foundation grant
- New York (lead state), Minnesota, Virginia, Illinois, North Carolina, and Maine
- Mission: Advance the use of social marketing in public health practice
- Strategy: Modify *CDCynergy* for social marketing applications

# *CDCynergy* Background

- A CD-ROM/web-based tool for developing, managing and evaluating *health communication programs*
- Original version (now revised) underwent rigorous testing and evaluation
- Now available in a variety of specific applications (e.g., tobacco, micro-nutrients, cardiovascular health, etc.)

# Who Needs Another CD?

## CDCynergy Strengths

- Flexible logic model
- Based in science
- Planning template
- Emphasis on:
  - formative research
  - evaluation
- Highly adaptable
- Cool graphics

## Social Marketing Needs

- “Closure” on the principles/model
- Structured and consistent method of application
- “Portable” tutorial
- Easy access to resources

# Social Marketing and Health Communication

- Communication and social marketing aren't the same (Duh!)
- Effective social marketing programs frequently rely on communication tactics

## Points of *convergence*

- Formative research
- Evaluation
- Planning
- Science

## Points of *divergence*

- Structural change
- Product
- Price
- Placement
- Barriers & benefits





# Goal and Objective

## **Goal:**

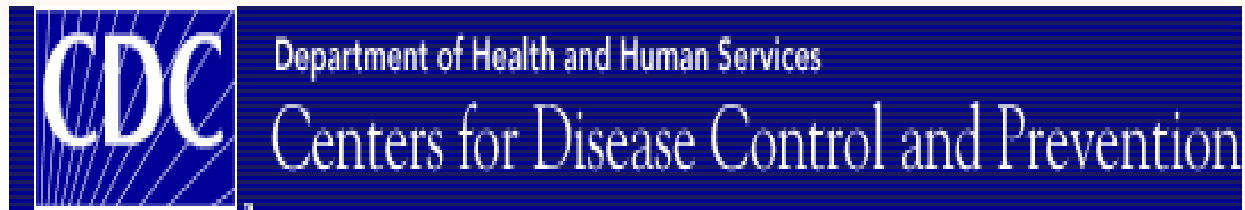
Advance the use of “best practice” social marketing by providing a planning tool like the communication version of *CDCynergy*.

**Behavioral Objective:** Public health managers and program staff will use the tool.



# Partners in Development

Turning Point



# Modifying *CDCynergy* for Social Marketing Applications

## Remember the Social Marketing Elements?

- Audience segmentation
- Formative research
- Strategy development
- Product design and testing
- Monitoring and evaluation



# Initial Formative Research

Turning Point



# Formative Research Phases

- Feedback on *CDCynergy* from SM professionals
- Audience needs assessment
  - Stakeholders
  - Users
- Review of existing social marketing models

# Feedback on *CDCynergy*

- Purpose: Assess potential of original version of *CDCynergy* (health communication) for conversion to a social marketing application
- Computer-assisted laboratory exercise at CDC
- 12 social marketing “experts”
- *Findings: strong potential, move forward*



# Target Audience(s) Survey

- Purpose: To learn about -
  - How social marketing is used in public health practice
  - Identify desired/useful characteristics of a social marketing program planning tool
  - Specific information/assistance needed by users
- Conducted by TP Social Marketing Collaborative

## Stakeholders

- Association reps
- Trainers
- Contractors
- Academics

## Users

- State and local level
- Varying access to resources
- Varying SM experience

# Needs Assessment Findings

- Social marketing – an effective tool for behavior change
- CD-ROM format – useful for program planning
- *CDCynergy* – adaptable for use as social marketing planning tool
- Content – keep it simple
- *Make it, we will use it! BUT, provide support!*



# Product Development (Content)



# Product Development Contract

- AED/Social Marketing Collaborative
- Phase I
  - Review formative research
  - Review existing SM models
  - Develop “logic model”
  - ID case studies
- Phase II
  - Write planning model scripts
  - Develop case studies
  - ID “on-board” resources

# Product Development Principles

- Work closely with CDC and Social Marketing Collaborative
- Regular monitoring and reporting
- Expert review panel
- Adherence to logic model
- “User-friendly” tools, language and methods

# Epidemiology

What causes health problem?

Who is at risk?

What behavior contributes to the risk?

Audience  
Behavior

# Marketing

What benefits can I offer  
in exchange for  
their behavior change?

# Communication

How can I communicate  
those benefits effectively?

Teens  
Smoking

Women  
Cancer  
screening

Undergrads  
Drinking

Etc.

# Product Development (Technology)

Turning Point



# CD-ROM Production

- Funded by CDC, Office of Communication
- Produced by Oak Ridge Institute for Science and Education (ORISE)
- Purpose: Modify *CDCynergy* architecture as needed and incorporate SM content, including:
  - Planning template
  - Resources (research, consultants, etc.)
  - Media examples
  - Navigation aids

# Product Testing

Turning Point

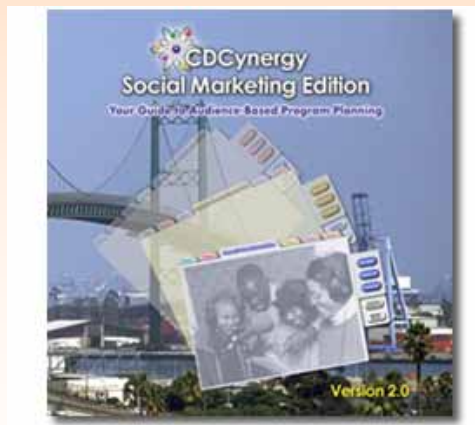


# *Beta Testing*

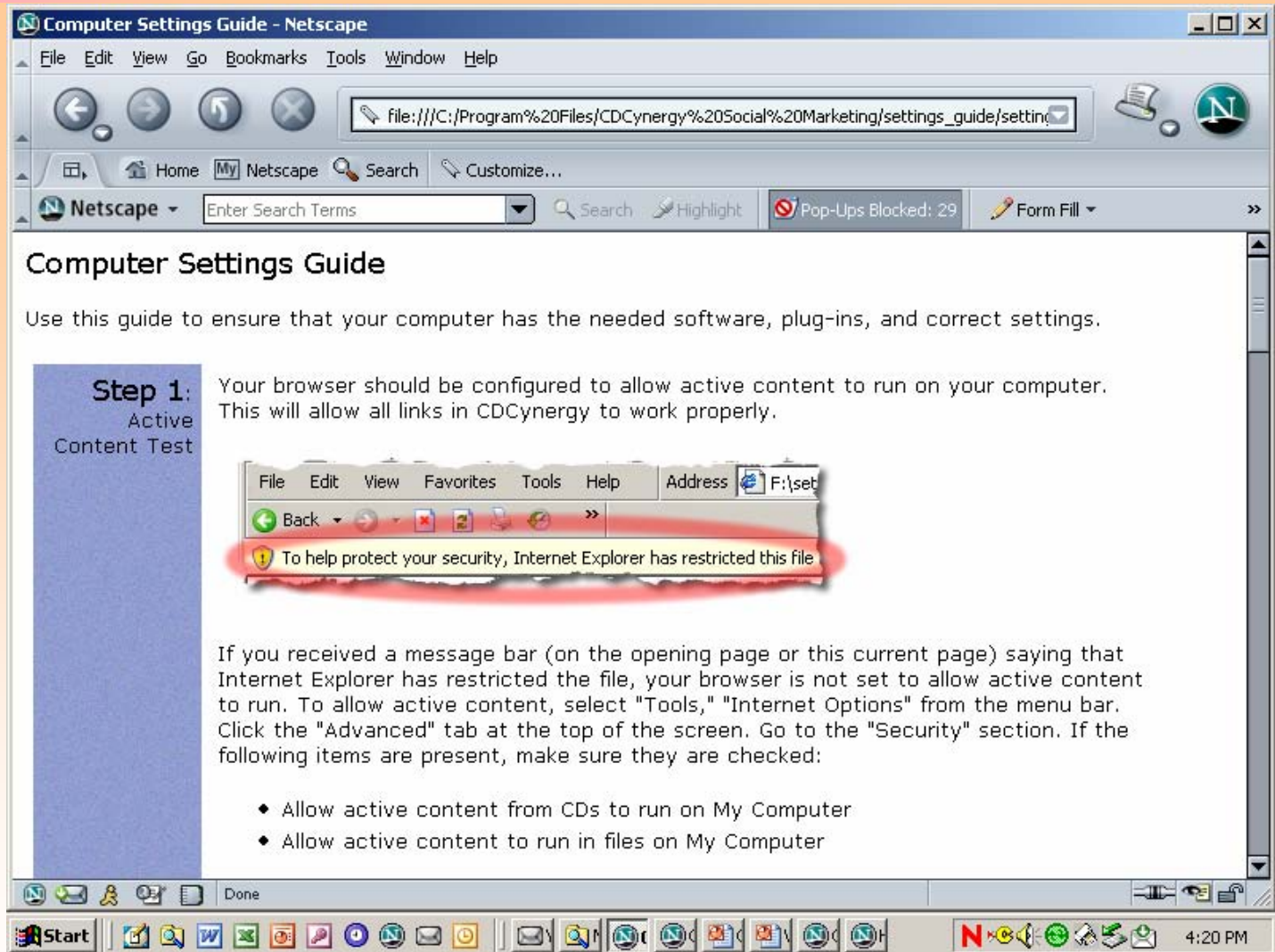
- Hosted by Minnesota Social Marketing Collaborative - Fall 2002
- Purpose: Evaluate “alpha” version of program using test website established by CDC
- Site: computer laboratory at University of Minnesota
- Test audiences
  - state public health administrators
  - local public health and CBO staff



# The Tool



Turning Point





Turning Point

Introduction to Social Marketing - Netscape

## Introduction to Social Marketing

- ["Introduction to Social Marketing"](#)  
(Video Segment - 6 Minutes)
- [Approaching the Social Marketing Edition \(Video Segments\)](#)
- [Primer for Managers](#)
- [Is Social Marketing for You?](#)
- [Phases and Steps](#)
- [Key Social Marketing Concepts](#)

Start | [Icons] | [System Tray] 4:23 PM

CDCynergy Social Marketing Edition - Netscape

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# CDCynergy Social Marketing Edition

MAIN PAGE

Phase 1: Problem Description    Phase 2: Market Research    Phase 3: Market Strategy    Phase 4: Interventions    Phase 5: Evaluation    Phase 6: Implementation

SELECT STEP

Introduction

## Introduction

A full, clear problem description and analysis will help you decide whether to undertake a social marketing effort. If you do, the problem description will help you keep your main goal in mind.

In this Phase, you will:

- ◆ state your health or safety problem and the groups it affects
- ◆ identify the major causes of the problem
- ◆ draft a list of possible audiences for your program
- ◆ learn about previous efforts to address the problem
- ◆ form a strategy team
- ◆ identify issues and aspects of your situation that could affect the program's success

You will rely on existing statistics and easy-to-find literature during this phase. If they leave some problem description or analysis gaps, you will fill them in with findings from the market research that you will conduct in Phase 2.

Examples  
Resources  
Consultant  
Tools for Research  
Media Library  
My Plan  
My Model

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CDCynergy Social Marketing Edition - Netscape

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**CDCynergy Social Marketing Edition**

Phase 1: Problem Description | Phase 2: Market Research | Phase 3: Market Strategy | Phase 4: Interventions | Phase 5: Evaluation | Phase 6: Implementation

SELECT STEP

Introduction

Introduction

2.1 Define your research questions.  
2.2 Develop a market research plan.  
2.3 Conduct and analyze market research.  
2.4 Summarize research results.

In P Summary

collected information about it from experienced colleagues and the published scientific literature, and drafted a preliminary definition of your target audience.

Now, in Phase 2, you will conduct market research to understand the audience better and refine its definition. You will:

- ◆ spell out your market research questions
- ◆ select research methods to answer those questions
- ◆ take full advantage of data that were collected for other purposes
- ◆ collect supplementary data
- ◆ summarize your research results

Market research has two basic parts:

- ◆ audience research
- ◆ assessment of your program's environment

Examples  
Resources  
Consultant  
Tools for Research  
Media Library  
My Plan  
My Model

Start

4:26 PM

Turning Point

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# CDCynergy Social Marketing Edition

Phase 1: Problem Description   Phase 2: Market Research   **Phase 3: Market Strategy**   Phase 4: Interventions   Phase 5: Evaluation   Phase 6: Implementation

SELECT STEP

3.4 Write your behavior change goal(s).

BACK   NEXT

### Step 3.4: Write your behavior change goal(s).

#### What To Do

Now you can write benefit exchange statements. Together, they are the core of the strategic plan or "blueprint" for your program.

It's also a good idea to take the time now to write about the rationale for the decisions you have just made in an audience profile. This document can be shared with other planners in later phases.

---

#### How To Do It

At this point you've identified the key target audience segments, the behaviors you want them to engage in, and what you will offer them in exchange.

Rewrite each audience segment/behavior couplet in the form of a benefit exchange statement that spells out the exchange. This condensed format makes it easier to explain the purpose of your program to stakeholders and partners.

Examples  
Resources  
Consultant  
Tools for Research  
Media Library  
My Plan  
My Model

Start | [Icons] | 4:28 PM

Turning Point

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## CDCynergy Social Marketing Edition

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[Step 1: Choose the behavior you will offer](#) | [Step 2: Describe the benefits you will offer](#) | [Step 3: Identify the barriers](#) | [Step 4: Develop the message](#) | [Step 5: Evaluate the plan](#)

Step 2: Describe the benefits you will offer.

**What to do:**

Social marketing is the commercial marketing it is based on the principle of exchange, the idea that people will bear certain costs to get something of value in return.

You want to offer your audience an exchange that:

- is easy to impossible to accept
- outweighs the benefits they will get for adopting a behavior
- removes any barriers that might deter them.

- Examples
- Resources
- Consultant
- Tools for Research
- Media Library
- My Plan
- My Model



Examples - Netscape

WIC - Breastfeeding

Chitterling Preparation

Teens Stopping Aids


Violence Against Women


## Phase 2: Conduct Market Research

### Step 2.1 Define your research questions.

Formative research aimed to collect consumer information needed to segment the population, identify important factors limiting breastfeeding, and define the methods to effectively promote breastfeeding. Some of the research objectives included:

- ♦ identifying the perception of breastfeeding and bottle-feeding (formula) held by the audiences,
- ♦ identifying the factors that motivate and deter the target audience group from breastfeeding and influencing audiences from encouraging breastfeeding, and
- ♦ identifying effective information channels and spokespersons for promoting breastfeeding among WIC participants.

 View Video Segment:  
Carol A. Bryant  
**"Breastfeeding Costs"**  
(7 Minutes)

 View Video Segment:  
Carol A. Bryant  
**"Breastfeeding Benefits"**  
(3 Minutes)

### Step 2.2 Develop a market research plan.

Start | [Taskbar icons] | 4:31 PM

**Phase 4 Resources - Netscape**

File Edit View Go Bookmarks Tools Window Help

Enter Search Terms Search Highlight Pop-Ups Blocked: 29 Form Fill

### Categorized Index

- Budgeting**
  - Coalitions/partnerships:
    - a. [Specific partners](#)
- Contractors/consultants**
- Creative briefs**
- Cultural competence**
- Ethics**
- Health and media literacy**
- Low-cost social marketing**
  - Message development:
    - a. [Message mapping](#)
    - b. [Message framing](#)
    - c. [Message tailoring](#)
- Policy/structural**
- Social marketing:
  - a. [Books/chapters](#)
  - b. [Journals](#)
  - c. [Documents \(PDFs, journal articles, etc.\)](#)
  - d. [Conferences](#)

### Phase 4 Resources

#### Budgeting

SEE ALSO: [Low-cost social marketing](#)

**Budget Worksheet**, fragment. [Budget Worksheet](#)

**CCH Business Owners Toolkit** is a website for small businesses with free tools for activity start-ups, marketing, hiring and budgeting. Downloadable checklist documents: <http://www.toolkit.cch.com>

**Costs for promotional items:** [Promo Items Cost Sheet.pdf](#)

**Expense Portion of Budget** [Expense Portion of Budget](#)

**GuideStar** houses a database of more than 700,000 U.S. non-profit organization budgets, timelines, activity charts, etc. <http://www.guidestar.org>

**The Foundation Center's Learning Lab**, *Proposal Budgeting Basics*, go to: [http://www.foundationcenter.org/learninglab](#) for information about this resource and a short proposal writing course [http://www.foundationcenter.org/learninglab](#)

Start | [Taskbar icons] | 4:33 PM

Videos in the Social Marketing Edition - Netscape

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*Phase 3: Create the Marketing Strategy - Consultant Videos:*

 View Video Segment:  
Michael I. Rothschild  
**"Marketing Strategy - Exchange" (6 Minutes)**

 View Video Segment:  
R. Craig Lefebvre  
**"Marketing Strategy - 4 P's" (4 Minutes)**

 View Video Segment:  
William Smith  
**"Marketing Strategy - Fun, Easy, Popular" (12 Minutes)**

 View Video Segment:  
May Kennedy  
**"Multiple interventions - when and why" (10 Minutes)**

Start | [Icons] | 4:34 PM

Turning Point



# CDCynergy Social Marketing Edition

- Phase 1: Problem Description
- Phase 2: Market Research
- Phase 3: Market Strategy
- Phase 4: Interventions
- Phase 5: Evaluation
- Phase 6: Implementation

SELECT STEP

BACK NEXT

2.1 Define your research questions.


Take note of whether audience segments vary in their answers to these questions. (See [Channels](#) and [Audience segmentation](#) in Definitions)

|  |   |  |   |
|--|---|--|---|
|  NEED MORE DETAIL | <a href="#">Dig deeper into a discussion of benefits.</a> |  NEED MORE DETAIL | <a href="#">Dig deeper into competition and social marketing.</a> |
|--|---|--|---|

### Example:

In [the WIC-Breastfeeding case](#), the central research questions concerned Hispanic women's perceptions of the costs or barriers and the benefits of breastfeeding and its competition, bottle-feeding.

View Video Segment:



Carol A. Bryant  
**"Breastfeeding Benefits"**  
 (3 Minutes)

- Examples
- Resources
- Consultant
- Tools for Research
- Media Library
- My Plan
- My Model

Turning Point

Tools for Research - Netscape

## Select a Tool for Research

Doer/Non-Doer Analysis

### Doer/Non-Doer Analysis

[\[Description\]](#) [\[Pros\]](#) [\[Cons\]](#) [\[Common Uses\]](#) [\[Resources\]](#)

#### Description

Doer/non-doer analysis a general research analysis that can be applied to both quantitative and qualitative methods. By comparing members of an audience who do a behavior to those who do not, you can identify the factors that may be important for behavior change.

The doer/non-doer interview includes six open-ended questions about:

- ◆ The perceived consequences of performing the desired behavior (What do you see as the advantages or good things of performing the behavior? What do you see as the disadvantages or bad things of performing the behavior?);
- ◆ Self efficacy (What makes it easier to perform the behavior? What makes it difficult to perform the behavior?); and
- ◆ Norms (Who approves or supports you doing the behavior? Who disapproves or objects to you doing the behavior?)

#### Pros

- ◆ Can be used in both quantitative and qualitative research methods
- ◆ Limits your research focus to practical, relevant research questions
- ◆ Focuses on one, clearly defined behavior

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MyPlan.doc - Microsoft Word

File Edit View Insert Format Tools Table Window Help

Type a question for help

1 2 3 4 5 6 7

to create a table of key program decisions about Target Audience, Behavior Change, Exchange/Benefits, Strategy, Intervention Activities and Tactics, go to the **My-Model** document.

**Phase 1-Problem-Description**

- [Step 1.1-Write a problem statement](#)
- [Step 1.2-List and map the causes of the health problem](#)
- [Step 1.3-Identify potential audiences](#)
- [Step 1.4-Identify the models of behavior change and best practices](#)
- [Step 1.5-Form your strategy team](#)
- [Step 1.6-Conduct a SWOT analysis](#)

**Phase 2-Market-Research**

- [Step 2.1-Define your research questions](#)
- [Step 2.2-Develop a market research plan](#)
- [Step 2.3-Conduct and analyze market research](#)
- [Step 2.4-Summarize research results](#)

**Phase 3-Market-Strategy**

- [Step 3.1-Select your target audience segments](#)
- [Step 3.2-Define current and desired behaviors for each audience segment](#)
- [Step 3.3-Describe the benefits you will offer](#)
- [Step 3.4-Write your behavior change goal\(s\)](#)
- [Step 3.5-Select the intervention\(s\) you will develop for your program](#)
- [Step 3.6-Write the goal for each intervention](#)

**Phase 4-Interventions**

- [Step 4.1-Select members and assign roles for your planning team](#)

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Turning Point

MyModel.doc - Microsoft Word

File Edit View Insert Format Tools Table Window Help

Type a question for help

Verdana 14 B I U

## My-Model

|                   |  |
|-------------------|--|
| TARGET AUDIENCE   | <p>In order to help this specific target audience:</p> <ul style="list-style-type: none"> <li>→ (start text here)</li> <li>→ (start text here)</li> <li>→ (start text here)</li> </ul>       |
| BEHAVIOR CHANGE   | <p>Do this specific behavior:</p> <ul style="list-style-type: none"> <li>→ (start text here)</li> <li>→ (start text here)</li> <li>→ (start text here)</li> </ul>                            |
| EXCHANGE/BENEFITS | <p>We will offer these benefits that the audience wants:</p> <ul style="list-style-type: none"> <li>→ (start text here)</li> <li>→ (start text here)</li> <li>→ (start text here)</li> </ul> |
| STRATEGY          | <p>And lower these barriers, address these 'Ps':</p> <ul style="list-style-type: none"> <li>→ (start text here)</li> <li>→ (start text here)</li> <li>→ (start text here)</li> </ul>         |

**Through these intervention activities and tactics:**

| Behavior Change Goals | Activities and Tactics | Program Delivery & Reach Objectives | Outcome Objectives | Resources Needed |
|-----------------------|------------------------|-------------------------------------|--------------------|------------------|
| Start text here       | Start text here        | Start text here                     | Start text here    | Start text here  |

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**CDCynergy Social Marketing Edition**


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SELECT STEP


BACK NEXT 1.6 Conduct a SWOT analysis.

**Knowledge Check**

 TEST YOUR KNOWLEDGE [Test Your Knowledge](#)

**Complete My Plan**

Use the SWOT worksheet linked to Step 1.6 of My Plan to record the strengths, weaknesses, opportunities and threats that you have outlined, along with any ethical barriers to adopting particular interventions in your community. Next write a summary of eliminated approaches and ones that appear to be more attractive based on this.

 EVALUATION RELEVANCE

[Examples](#)

[Resources](#)

[Consultant](#)

[Tools for Research](#)

[Media Library](#)

[My Plan](#)

[My Model](#)

[<printable version>](#)

Start | Y. | N. | C. | C. | C. | H. | M. | 4:48 PM

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# For More Information

- *Mike Newton-Ward, Social Marketing Consultant*  
North Carolina's Turning Point  
E-mail: [mike.newton-ward@ncmail.net](mailto:mike.newton-ward@ncmail.net)
- *Social Marketing National Excellence Collaborative*  
<http://www.turningpointprogram.org/Pages/socialmkt.html>
- *TangibleData Media on Demand*  
<http://tangibledata.com/CDCynergy%2DSOC/Drive-thru/index.cfm>

