

# Phase 3: Strategy Development

This module describes phase 3 of the social marketing planning process, strategy development. On average, it takes people 40-45 minutes to complete this module. The time you need will depend on your pace and how much you explore the resources and supplemental materials.

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## Learning Objectives

After completing this module, you will be able to

- Explain the purpose of the strategy development phase and describe why it's important.
- Describe three general principles of the strategy development phase.
- Explain how to use evidence in the selection of interventions.
- List possible audience segments; analyze options, and select a target audience.
- Describe the benefits of a good audience segment description.
- Identify secondary audience(s).
- List possible behaviors to change; analyze options and select a behavior to change.
- Explain how to write SMART behavioral objectives.
- Explain what "marketing mix" is and define each component.
- Describe how each component of the marketing mix influences key strategy decisions.

## Introduction

Phase 3 of the social marketing planning process is strategy development. The marketing strategy includes anything that explains how you will influence the target audience to change their behavior. Concretely, you should think about how your program will address each of the 4 P's in the marketing mix. Also consider concepts from theories or models, evidence-based strategies, and any other pertinent information that may affect adoption of the desired behavior.

During this phase you will learn how to take all of the information you've collected, analyzed, and summarized in the first two phases and use it to make strategy decisions, such as

- A final target audience segment.
- Secondary audiences.
- Specific behavior change and behavioral objectives.
- Strategies based on the 4 P's.

The entire marketing strategy should answer the question: "How can we get the target audience to adopt the desired behavior(s)?" You should be able to explain your intervention design based on data about/from your target audience, theory, and other research.

### Tip

Determining a marketing strategy should be a creative process. Some members of your planning team may be uncomfortable with brainstorming and working with free-flowing ideas. If so, try selecting a smaller group of individuals who are comfortable with the creative (although still research-based) nature of this process. They can work on some initial strategies and then take their ideas back to the larger group.

In this phase, you must manage the expectations of a variety of stakeholders. Many stakeholders may not be familiar with social marketing and how it works. You'll want to involve them, but sometimes you may need to reign in people who want to jump ahead.

It can be very tempting when planning a social marketing program to begin thinking about what types of communication materials to develop or about a great slogan or logo. But, those details should wait until phase 4. Develop a clear outline for your program BEFORE you begin working on those details. This ensures that you take advantage of the information you've collected in phases 1 and 2 to create a unified and strategic program with reinforcing components.

There are many factors to consider when you get to this stage in the planning process:

- Meeting needs of your target audience.
- Staying focused on behavior change.
- Program logistics.
- Evaluation considerations.
- Preferences of partners and stakeholders.
- Requirements of your funding agency.
- Political concerns.

The formative research phase may seem like the most difficult part of the planning process but experienced planners say that the strategy development phase can sometimes be more difficult. Well-planned formative research makes this process easier, but there are still many hard decisions to make. Be prepared to feel a little overwhelmed at this point, but this is normal. Make an effort to work through this phase.

## Resources

- [Strategy Development Worksheet](#)
- [Obesity Prevention Coordinators' Social Marketing Guidebook](#) (PDF-2.6Mb)

This module begins with three general principles to use as you move through this phase and then discusses the use of evidence-based strategies. Then, we'll go through the *Strategy Development Worksheet* within the *Obesity Prevention Coordinators' Social Marketing Guidebook*. This resource offers a helpful guide for the strategy decisions you'll need to make.

## General Principles

Some things to keep in mind when making strategy decisions are

- Be creative.
- Consider policy and environment-level changes when appropriate.
- Keep your audience's perspective.

The marketing strategy you develop should be closely linked to the results of all of your formative research (including your secondary data collection and problem description). It should be easy to see the connections between the components of the marketing strategy and what you know or have learned about the target audience. The key insights you found in phase 2 when you were analyzing your data should play a role in the strategies you develop in this phase.

### Tip

Completing a table like the one below can provide a self-check that you have connected the marketing strategy components with your formative research results.

<b>Data Collection Method</b>	<b>Key Finding from Research</b>	<b>Component of Marketing Strategy that Addresses the Key Finding</b>

This type of table will allow you to easily see the link between formative research results and your marketing strategy. It can also help you document decisions made at this stage in a clear, concise manner and facilitate sharing with partners and stakeholders.

### Be Creative

The strategy development phase provides an opportunity to be creative in how you address the audience's wants and needs. Brainstorm new and exciting ideas. Try to describe the audience's experiences—both current experiences and those you would like them to have. For example, if you'd like your target audience to purchase more fruits and vegetables, pull all the information you found during formative research about all the steps they have to go through to do this

- Where do they shop for food?
- How does that experience take place? Do parents/adults take children with them? Are they alone? Are they busy or do they have plenty of time to wander around?
- Is it an organic market? A supermarket? A convenience store?
- What does it look like? Smell like?
- What's on their minds as they are shopping?

## Tip

While creativity is valued during this process, you don't have to come up with a "magical solution." Sometimes the more obvious answers are the best ones.

Try writing key insights on sticky notes and move them around to see what goes together. Group ideas in categories, then break them up and group them in new categories.

## Consider Policy and Environmental Changes

Policy or environmental level changes can support individual behavior change. Many social marketers get caught up in developing strategies to get individual-level behavior change without complementing those changes with policy or environmental level changes. How can you help make the behavior easier for your audience? What barriers from your formative research findings can be overcome with policy or environmental changes? Think about strategies you can use to influence the "upstream" behavior of policymakers and those responsible for the environment, if appropriate. This can help you create a more comprehensive plan.

## Big Picture Alert

If you decide now that you want to incorporate policy and environmental changes in your program, but haven't conducted formative research with policymakers, business owners, etc., you may need to go back to phase 2 to gather data on these groups. Think of them as another target audience with their own behaviors to change.

Need to review? See [Phase 2: How to Choose a Method](#).

## Keep an Audience Perspective

We've talked about keeping an audience perspective throughout the social marketing process. At this stage it is easy to get frustrated and start thinking of the target audience as having poor attitudes or lacking basic knowledge. If you find yourself in this position, it can be helpful to remind yourself of the need for keeping their point of view

"Believing passionately in a product or a program is one of the most endearing traits of social marketers...This zeal becomes dysfunctional when the marketer sees the customer as an adversary, as someone who has the wrong habits or the wrong ideas or is just plain ignorant or unmotivated."

Alan Andreasen, *Marketing Social Change* p. 42-43

But, using a true audience-focused mindset provides a different perspective:

"The customer is seen as someone with unique perceptions, needs, and wants to which the marketer must adapt...The assumption is made that customers have very good reasons for doing what they are doing. The marketer's challenge is to figure out how to adjust the marketing program to respond to these reasons."

Alan Andreasen, *Marketing Social Change*, p.49

## Using Evidence to Select Interventions

There are two levels of evidence for program planning. The broader level of evidence is made up of intervention approaches, such as those found in the Community Guide. One example is "create or improve access to places for physical activity."<sup>1</sup>

Second, a more specific level of evidence comes from actual programs or interventions that have been evaluated and tested. These "off the shelf" or existing interventions usually have materials and/or activities already developed. It can be tempting to use them as they are, especially if you don't have the time or resources to develop a complete program from scratch. But, avoid blindly adopting such an intervention without going through the steps described in the first few modules of this course to get to know your audience and what will be most appropriate for them.

Based on what you know about your audience, you can analyze existing interventions to determine if they apply to your particular audience and behavior. Think about the existing interventions as a starting point that will most likely need further refinement to meet your audiences' needs. Note any modifications that will need to be made. Most importantly, don't ignore your research results to adopt a program because it will be easy to implement. The social marketing planning process supports the use of evidence-based approaches and interventions. Broad-level approaches (i.e., Community Guide) do not include information on **how** to implement the approaches. Those decisions are driven by what you learn during the problem description and formative research phases about

- Barriers.
- Incentives.
- Motivators.
- Key influencers.
- Partner resources.
- Other parameters unique to your audience.

### Example

Kentucky built upon the existing VERB campaign to develop a localized Summer Scorecard program. Read about their story in this [case study](#). (PDF-971k)

The social marketing process can help you tailor or adapt an existing intervention. Again, knowing your audience's barriers to change and what will motivate them can guide the adaptation of existing programs or materials. Formative research can provide details (e.g., how to reach participants, appropriate incentives) that may not come with a packaged intervention.

Thinking about the strategy decisions in this phase will help you identify any gaps in existing programs, if you choose to use them, which you'll need to account for with other program components. For example, you may find an existing program that addresses your audience's

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<sup>1</sup> *Guide to Community Preventive Services, Creating or Improving Access to Places for Physical Activity is Recommended to Increase Physical Activity.* Found online at <http://www.thecommunityguide.org/pa/>

barriers and capitalizes on their motivators, but there may not be direction on appropriate places for the program or how to promote it.

### Tip

Regardless of whether you create a new intervention from scratch or modify an existing one, pre-testing will be vitally important. See pre-testing section in phase 4 for more information.

### Resources

The following resources can help you determine which approaches have sufficient evidence

- [Technical Assistance Manual](#)  
CDC; Division of Nutrition, Physical Activity and Obesity
- [Guide to Community Preventive Services](#)
- [Institute of Medicine Reports](#)
- [Research to Practice Series](#)  
CDC; Division of Nutrition, Physical Activity and Obesity
- [Guide to Breastfeeding Interventions](#)  
CDC; Division of Nutrition, Physical Activity and Obesity

Some databases that review existing interventions are

- [Overview of Nutrition, Physical Activity, and Obesity Intervention Strategies](#)  
UNC-CH Center of Excellence
- [Cancer Control P.L.A.N.E.T.](#)



## Make Strategy Decisions

Now, we will discuss the strategy decisions that you'll make in phase 3. We will go through the *Strategy Development Worksheet* found in the *Obesity Prevention Coordinator's Social Marketing Guidebook*. This worksheet roughly follows the four plan components, although since the health problem should be well understood by now, the focus will be on the audience, behavior, and strategies for change. This worksheet allows you to input major findings from the problem description and formative research phases. You can use those findings to make key decisions and create your overall strategy.

### Big Picture Alert

We've laid out the components of a marketing strategy and some guiding principles in this section of the module. While it looks like these decisions are made sequentially, in reality, they are made at the same time and any changes you make in one area will affect other areas.

### Resources

- [Strategy Development Worksheet](#)



## Make Strategy Decisions

### Choose an Audience Segment

After analyzing the formative research results from phase 2, you will choose a specific target audience segment. If you had more than one round of formative research, you may have been able to narrow down your audience segment after an early round. If not, now is the time to do so.

Your choice is also influenced by

- Available resources.
- Stakeholder and partner wishes.
- Political climate.
- Funding requirements.

For example, if your funding source dictates that you should work with a low-income population, then that consideration should be factored into your segmentation framework. You could still choose a segment based on other factors, especially if income level doesn't affect the behavior you're trying to change, but then attempt to work with the individuals in the segment that qualify as "low-income." You must decide which criteria matter to behavior change.

If you have more than one option for a target audience segment at this point, it may be helpful to make a list of these and compare them. If you are completing the *Strategy Development Worksheet*, list the program goal and audience segment at the top. Complete a separate worksheet for each segment you have chosen.

Need to review? See [Phase 2: Audience Segmentation](#).


#### Tip

If you choose to work with more than one audience segment, you should have separate behavioral targets and a different marketing strategy for each.

#### Resources

- [Choosing an Audience Segment Worksheet](#)  
This worksheet provides a sample table that will help you organize information to better compare audience segments.
- [Strategy Development Worksheet](#)

## Scenario 24



Rosa: "We still have work to do on our target audience. During our formative research, we decided on children ages 4-7 but we haven't narrowed it down any further than that. Because this group is so young, we did most of our formative research with parents. We may need to segment based on what we know about the parents, even though I think we'll most likely think of them as our secondary audience because they have so much influence over the children's behavior. We tried segmenting based on level of concern about children's TV habits. We did two focus groups with parents who reported high levels of concern and two groups with parents who reported medium or low levels of concern. But that split didn't seem to make much difference to how much TV they actually watched.

So, I asked Tiffany to look at the data from our problem description, secondary data, and our formative research. I got her to note any findings that might help us determine a way to segment our audience. Here's what she wrote down:"

- Parents find it difficult to keep track of children's time with media.
- Parents believe they'll have to "entertain" their children if they aren't watching TV.
- Parents see watching TV as an activity they can do together, provides things for them to talk about.
- Parents see TV as displacing other activities, ones that could be more valuable or useful (i.e., chores, reading, playing outside).
- Some parents are worried about content of TV, especially violence.
- Parents felt that 2 hours or less was reasonable in theory, but would be difficult to enforce.
- Parents have varying rules and practices for TV watching: some have rules about content, some have "rules" that end up being general family practices, and some parents closely monitor how much time their children spend with the TV. Parents who monitored the time spent watching TV had children who watched less.
- Parents do say that they want to connect with their children and can see TV takes up valuable communication time.

**Based on the information Rosa and Tiffany presented, provide your recommendation about whether Rosa should segment her audience any further, and if so, how you would recommend segmenting. Check the most appropriate response.**

1. No, you've narrowed the audience down enough.
2. Yes, you should segment. Try segmenting by current practices, like the type/amount of rules families have about TV.
3. Yes, you should segment. Try segmenting by the stages of change model, like parents in the "pre-contemplation" stage.
4. Yes, you should segment. Try segmenting by geographic location, like families in one neighborhood.

Feedback:

1. This would be **poor advice**. There is too much variation in this broad audience for you to be able to tailor a program. You should try to find some way to segment them further.
2. This would be **good advice**. Formative research indicates there are different groups of parents who have different types of rules about TV time. Plus, it seems as though this does impact behavior.
3. This would be **poor advice**. Stages of change could be a good framework for segmenting, but Rosa and her team didn't ask about it during their formative research, so they don't have enough information available to use this as a potential segmentation framework. If they wanted to use this approach, it would require additional research to determine if "stages of change" is an appropriate factor.
4. This would be **poor advice**. There are no data that indicate families in different neighborhoods behave differently. Rosa and her team may want to pilot their program in a specific neighborhood, but a different geographic location wouldn't call for a separate programmatic approach.



## Make Strategy Decisions

### Choose an Audience Segment (cont)

Once your final target audience is identified, you may want to spend some time writing a detailed description of the segment. If so, use the information you gathered in phases 1 and 2, such as

- Current behaviors.
- Attitudes
- Perceptions.
- Motivators.
- Barriers to adopting the desired behavior.
- Preferred methods of getting information.
- Demographic characteristics.

#### Big Picture Alert

In some cases, if you don't have much data on the segment you've chosen, you may need to go back and identify any important gaps and use additional formative research to fill those gaps.

Identify and document the characteristics of this particular segment that make the members different from the other possible segments you were considering. You may want to come up with a name that provides a short description of the segment's important characteristics.

Another way to describe your audience segment is to write a short profile describing an individual who personifies your segment. Doing this will provide a context for the rest of your decisions. An image of this individual can be helpful as well. You may want to have a graphic artist draw an image, or find a photograph online.

Once developed, either of these two descriptions can be used in multiple ways. They can be given to your partners and stakeholders, or sent to your funding agency. Most importantly, they can help your planning team keep the target audience in mind when making decisions.

#### Example

During the planning process for an intervention, a planning team from Georgia held a large meeting to update their stakeholders on their strategy decision. One stakeholder suggested they use a specific intervention, but it did not fit the audience segment selected by the planning team. Because the planners knew their audience so well and had a summarized description of their segment, they were able to demonstrate that the suggested intervention would not work. It did not reach the audience in appropriate places, it didn't seem to appeal to the lifestyle characteristics of the tweens, and it did not address barriers identified in formative research.

#### Resources

- [Examples of Audience Descriptions and Profiles](#) (PDF-105k)



## Make Strategy Decisions

### Choose Secondary Audiences

In addition to choosing a final audience segment, you will need to make a decision about any influencing audiences you want to include in your program. Look through the problem description data and formative research results to find information that reveals who the target audience segment finds influential. If you are using the *Strategy Development Worksheet*, any pertinent data can be placed in the Formative Research Results column.

Next, use that information to answer the following questions:

1. Is there an important secondary audience?
2. If so, does the secondary audience influence the audience segment's behavior enough so that you should devote program resources to reaching the secondary audience?
3. If so, how will your program activities be designed for the secondary audience (in order for them to influence the primary audience)?

Once you have made those decisions, write them down in the second column of the worksheet, beside "Secondary Audience."

Need to review? See [Phase 2: Secondary Audiences](#).


#### Tip

If you choose to develop program activities for the secondary audience, you will probably want to apply the audience orientation outlook to them as well.

#### Resources

- [Strategy Development Worksheet](#)

## Scenario 25



Rosa: "We finally agreed that the audience segment will be children ages 4-7 in households with no current rules about TV watching.

However, now the planning team can't decide on a secondary audience. We thought we had it figured out: children as primary audience and parents as the secondary audience, but now Bob is adamant that we include parents as part of our primary audience. We've spent lots of time discussing this. Bob keeps saying that you have to change the parents before you can change the children. I just don't see why this is so important to Bob. It's confusing because we really want both the parents and children to change.

I've asked Dan to help us out. He suggested that we not get so caught up in trying to figure out whether parents are a primary or a secondary audience. Apparently, this is a common issue when people are designing programs with young children. Instead, he said we should focus on the implications this has for our program, especially which behavior we are asking of our audience.

Now, I've scheduled a conference call with the planning team to discuss this issue again. What do you think I should suggest to them, so we can get past this issue? What will keep everyone happy and moving forward?"

### What should Rosa suggest? Check the appropriate answers.

1. Make parents the primary audience to keep Bob happy. Since it doesn't matter what you call them, this should help eliminate that conflict.
2. Suggest that as a team, you spend the call talking about what your research says about how the parents and children influence each other.
3. Make an executive decision to have children as the primary audience and parents as secondary. No more discussion, and then you can move on.
4. Talk about the impact on your next steps. Ask the team if they think the program's activities (whatever they may be) should be directed towards parents or children.
5. Talk about which behaviors you want to change. Once you know this, you may be able to better determine whether parents or children are the ones who should be changing.

### Feedback:

1. This would be **poor advice**. Simply eliminating the conflict won't help you move forward
2. This would be **poor advice**. You have the research gathered and analyzed already. It's time to spend some time figuring out how the data will help inform your program's strategies.
3. This would be **poor advice**. Making this kind of decision without buy-in from your team won't help solve the problem.
4. This would be **good advice**. Turn the focus to what impact this situation has on your potential program. Start to talk about decisions like this to move past the issue.
5. This would be **good advice**. Depending on which behavior you select, that could help you resolve this question.



## Make Strategy Decisions

### Choose a Behavior

As you choose an audience segment, you'll also make a final decision about what behavior you want the audience to do. Choosing one segment over another will probably have implications for the behavior you choose.

The specific behavior should be relevant to the health problem and feasible for the audience segment. For example, asking someone who currently eats around a half-cup of fruits or vegetables a day to start eating two and a half cups or more is probably not achievable. It may be most appropriate to choose a behavior that moves the audience towards the "gold standard" of recommended behavior, especially if they are not currently close to meeting that standard.

The "ideal behaviors" are those identified in guidelines, recommendations or documents like the *Healthy People* goals and objectives. While you can plan for long-term outcomes that meet the ideal goals, short term behavioral objectives should fall somewhere between baseline behaviors and the ideal, unless the target audience's current behaviors are very close to the ideal. Also, you must choose an actual behavior, and not just knowledge or attitudes. Changes in knowledge or attitudes may precede behavior change, but should not be the end goal of a social marketing program. The nutrition and physical activity behaviors that you will probably be working with are permanent, complex lifestyle changes, which are more difficult to change than single actions or simple, repeated actions.

If you are using the *Strategy Development Worksheet*, add your data to the Formative Research Results column and use them to choose a "Behavior to Recommend."

### Resources

- [Strategy Development Worksheet](#)

How audience segment can affect behavior choice:

Broad Behavior	Segments	Specific Behavior
Eating more fruits and vegetables	Segment 1: Currently eats most meals at home. Eats fruits with breakfast and vegetables with dinner meal, but still not enough to meet government recommendations.	Add one serving of fruits or vegetables to the lunchtime meal
	Segment 2: Currently eats most meals outside the home. Eats fruits and vegetables rarely.	Choose meals with fruit or vegetable options while eating out.
Getting more physical activity	Segment 1: Working parents of young children who have limited amounts of time to be physically active during morning or evening	Spend 30 minutes of lunch hour walking around the office building.



	hours because they need to take care of children.	
	Segment 2: Parents of school age children who want to spend more quality time together as a family.	Spend 30 minutes in the evening playing active games outside with children.
Breastfeeding	Segment 1: Women who give birth without having made up their minds about whether or not they'll breastfeed their newborns, but are open to the idea.	Do not accept formula samples at hospital after birth of child.
	Segment 2: Women who have decided to breastfeed but have difficulties after leaving the hospital.	Call a lactation consultant when having problems.
Reducing television watching	Segment 1: Families with a TV in their child's bedroom when the child starts school and who believe that excess TV can impact school performance.	Remove the TV from child's bedroom.
	Segment 2: Families who consistently watch TV during mealtimes.	Turn the TV off during mealtimes.

## Scenario 26

Rosa: "Well, we decided not to make a big deal about designating parents as a primary or secondary audience. Instead, we spent a lot of time talking about potential behaviors to change.

You know? Between the literature search and the formative research, it looks like we've got a pretty good list.

- Turn TV off during mealtimes.
- Watch less TV after school.
- Remove TV from all bedrooms.
- Monitor TV time.
- Limit TV time.
- Schedule TV shows to watch as a family.
- Serve or eat only healthy snacks while watching TV.
- Establish family rules for TV time.
- Schedule alternative family activities to replace TV watching.

Some of the planning committee members want to address all of the TV-related behaviors we've discussed. Their thinking is that different behaviors will be important to different families and by addressing all of them, we're providing options. But, there are a couple of people (parents themselves) that keep bringing up the point that asking parents to do all of these behaviors can be overwhelming."

**What do you think Rosa should recommend to the planning committee? Check the most appropriate response.**

1. Only choose one behavior. That's the most we should ask of anyone.
2. Choosing more than one behavior is fine, as long as we base our decision on what we know about the audience. We'll need to make sure any behaviors we choose are achievable, relevant, and will make an impact.
3. We have to change all the behaviors we listed before we can make any significant health impact.

Feedback:

1. This would be **poor advice**. There are some situations where you can ask the target audience to adopt more than one behavior.
2. This would be **good advice**. Depending on the situation of your audience segment, one behavior may be enough, or you may be able to ask them to change more.
3. This would be **poor advice**. Trying to impact too many behaviors can overwhelm participants and actually have a negative result. Behavior changes should be reasonable and achievable.





## Make Strategy Decisions

### Write Behavioral Objectives

The next step is to turn each specific behavior into a behavioral objective. A behavioral objective is something that you will use as a program planner to determine if your program is working. It should meet the "SMART" criteria

- Specific.
- Measurable.
- Achievable (or Attainable).
- Relevant (or Realistic).
- Time-specific.

Some examples of SMART behavioral objectives are

1. Mothers of preschool children in Oak Park neighborhood will offer at least one additional  $\frac{1}{2}$  cup serving of a fruit or vegetable each day to their children between (date) and (date).
2. High school principals in Eastside school system will replace all sugar-sweetened beverages with water and 100% fruit juice in all school vending machines by (date).
3. Increase percentage of urban African-American tween males in the state who are involved in active play (outside of school time and with peers) for at least 60 minutes a day, 5 days a week from 35% to 50% by the end of this year.<sup>2</sup>

The purpose of a behavioral objective is for you to be very clear about what you want the target audience to do in response to your program. Even if your program is designed to develop policy and environmental changes, you still have a behavior that you'll ask your target audience (or a secondary audience) to do. Other objectives, such as those used for process and outcome evaluations are different from those used to identify and measure behavior change in your target audience. You will write those objectives in phase 4.

You won't be able to tell if your behavioral objective is achievable or relevant unless you know who your target audience is. What is achievable for one group may not be achievable for a different group.

If you don't have specific baseline data on the behavior for your audience, write the objectives as specifically as possible without this information. Once you begin the intervention plan to collect this baseline data from the participants. At that time, you should go back to your objectives and revise them so that they are appropriately specific and measurable.

#### Tip

You may be required by your funding agency or your own organization to write objectives for your program or intervention. These objectives are not necessarily the same as behavioral objectives for a social marketing intervention. Check with your funding agency to find out what type of

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<sup>2</sup> Adapted from Georgia.

objectives they require. You may need to wait to write process and outcome objectives until you've started working on a detailed program plan and a monitoring and evaluation plan in phases 4 and 5.

## Resources

- [Goals and SMART Objectives Tutorial](#)
- [Evaluation Guides for SMART Objectives and Evaluation Plan Development](#)

## Scenario 27

"We really had a breakthrough once we chose the behaviors that we're going to focus on

1. Monitor TV time.
2. Limit TV time.
3. Establish family rules for TV time.

Because they are all linked together, we felt comfortable having more than one behavior as our goal. Also, determining what behaviors we'd like to change helped us see that we want parents to change their behavior, but do it in a way that influences the children. Based on the definitions of primary and secondary audiences, it looks like children are still our primary target audience, but parents will be strong influencers. And, the majority of our efforts will be directed at parents.

After that decision was made, Bob and I met with a small group of coalition members to review our decisions so far and to get their input in creating our objectives. It was amazing. We divided into two groups and had each group write SMART objectives for one of the behaviors on our list. Nobody had any problems with our final behaviors and they seemed to enjoy the exercise on writing objectives. They worked hard and encouraged us to continue.

Here are some of the objectives they came up with. I think a couple of them need some changes. What do you think?"

**Which of these objectives should Rosa and Bob edit? Check all that apply.**

1. Ninety-five percent of parents in the target audience segment will set up and enforce at least one rule about television one week after the program starts.
2. Fifty percent of parents who don't currently talk to their children about the types of TV they watch will begin doing so within two weeks of the start of the program.
3. Twenty-five percent of parents without any TV rules will discuss rules concerning TV time with their children within three weeks of the start of the program.
4. Fifteen percent of children will reduce the amount of TV they watch on a weekly basis by 10% as a result of new family rules within 10 weeks of the program's start.

Feedback:

1. This objective should be edited. It is not **achievable** to expect 95% percent of the target population to make this type of change in one week.
2. This objective should be edited. While it might be a step toward establishing rules about TV, as stated, it isn't **relevant** to the behavior change desired.
3. This objective is fine as it is written.
4. This objective is fine as it is written.

## Make Strategy Decisions

Once you have made decisions about the audience and behavior, it is time to think about the marketing mix to determine how behavior change will occur with your audience. We'll start with "product."



### Develop Product Strategy

Part of your product strategy comes from the behavior you've chosen but the behavior alone isn't your total product. You are not only selling the behavior, but a package of benefits that comes along with the behavior. Choosing a behavior that is relevant and attainable for the target audience is the first step in developing a product strategy. Next, you may need to use, create, or modify some tangible products or actual services in addition to the behavior you want to change; for example

- Cookbooks.
- Food diaries.
- Pedometers.
- Nutrition counseling.
- After-school care.
- Breastfeeding support.

The other major part of your product strategy is to link core benefits to your product or behavior. What benefits can/should you highlight? Look back at your data and research results to determine what your audience values. These are the characteristics to attach to the desired behavior. Sometimes those benefits are not health-related. You may need to position the product or behavior as a way to get some larger perceived benefit such as increased confidence, belonging to a group, or closeness with friends or family. For example, if focus groups suggest that children really value spending time with their parents, then try to position being active together as a way to reconnect with one another.

Need to review? See [Basics of Social Marketing: Product](#).

"The educational messages that the social manager presents ask the individual to begin to exercise and eat more vegetables while watching less television and eating fewer high-fat foods. In return, the individual is promised some vaguely lower probability of having a heart attack that may or may not occur at some undetermined time in the future. Such a message proposes an exchange that offers neither a temporally close transaction nor an explicit payback. The individual is called on to make a choice between a behavior that definitely leads to an easy-to-see, certain, immediate, pleasant outcome and a very different behavior that may lead to a less certain but longer-run pleasant outcome."

Michael Rothschild, *Carrots, Sticks, and Promises*, p. 28

Also, think about the immediate benefits of the desired behavior. Public health professionals (who care greatly about the health of others) can get too focused on the long-term health benefits, especially of nutrition- and physical activity-related behaviors. We want people to give up current

pleasures for some long-term benefit that they aren't sure will ever come. That's a hard sell. So, do what you can to promote the more immediate benefits of your desired behavior.

For example, formative research showed that tweens in Lexington, Kentucky, believed physical activity would give them more energy and make them look better. Instead of promising a long life free of chronic diseases, the program promoted energy and feeling good about oneself as some of the benefits of physical activity.

Once you have chosen the benefits to promote with your product, you must also consider how you will support those claims. Telling the target audience the benefits of changing behavior is only effective if they experience those benefits. Your messages, materials, and activities should combine to support your claims about the behavior.



## Make Strategy Decisions

### Develop Price Strategy

Your pricing strategy should address the costs or barriers to behavior change. Commercial marketers are concerned with the monetary cost to obtain the product. Social marketers usually have other costs to address. You should have identified the relevant barriers or costs from your secondary data and formative research. Now, think about how you can minimize the costs or barriers to the desired behavior; or how you can increase the costs of competing behaviors. For policymakers, one of the barriers to change could be disapproval from their constituents. Members of a school board or principal could believe that if they make a policy to ban soft drinks in schools they could be accused of taking away individual freedoms which could hinder chances for re-election or cause complaints from parents. Help elected officials position the change you want as a real benefit to their constituents.

Many times your first inclination to minimize barriers such as lack of knowledge or education is to create materials or to educate the target audience about the issue or behavior. Knowing or believing certain things may be precursors to behavior change, but usually changes in knowledge and attitudes aren't sufficient on their own to get people to change their behavior. Think beyond providing education or materials and try to address some of the stated or unstated barriers to change.





## Make Strategy Decisions Competition and Exchange

While you are thinking about your product and price strategy, you need to think about competition and the exchange you will offer.

Consider the competition. You should know by now (from secondary data and formative research) what your audience currently does instead of the desired behavior. As you think about the product and price strategies, think about how you can make the desired behavior more appealing than what the audience is already doing. How can you change what you're offering, this package of behavior and benefits, so that it is preferable to competing behaviors?

You should also identify the exchange. People usually act on the premise of self-interest and then make choices about behaviors that fulfill their self-interest. As a marketer, you need to create an exchange that will satisfy the audience's self-interest, while also satisfying your own interests (getting them to do the desired behavior). For the audience to change their behavior, your offer should have a better cost/benefit ratio than the competition. This exchange is created by your determination of the product and price, as well as how well you "sell" the product (or behavior) to the audience.

You may want to create what's called an exchange table. This is a 2-column table where you write down everything you think the audience is giving up to adopt the behavior in one column, and everything they will gain in the other column. Lining up the benefits and barriers this way can give you a complete picture of the exchange you'd like to see, and if it is a feasible proposition.

For example:

<b>Audience:</b> Middle-aged women who are not confident of their ability to be physically active but have some social support.	
<b>Behavior:</b> Be physically active for 30 minutes each day with a friend.	
<b>Audience Gives Up:</b> <ul style="list-style-type: none"><li>• Time (at least 30 minutes).</li><li>• Money (to purchase new clothes or shoes).</li></ul>	<b>Audience Receives:</b> <ul style="list-style-type: none"><li>• More confidence in ability to be active.</li><li>• Feeling more energetic.</li><li>• Increased connection with friends.</li></ul>
<b>Social Marketer Gets:</b> Improved health of audience.	



## Make Strategy Decisions

### Develop Place Strategy

The placement strategy should address

- Where the audience does or should do the desired behavior.
- Where the audience is located or where they gather.
- Appropriate times and locations for messages and information (i.e., message channels).

If you've developed or are using a tangible product or service, think about how the target audience will access the products or services.

- Is the location convenient?
- Can you make it more convenient?
- Are the hours appropriate?
- Is the location appealing?
- Are staff members friendly and accessible?

Think about who will help you implement the program. What plans can you make to ensure that they know the right message and will take it to the audience? If your program aims to change the environment of the target audience, think carefully about this "P."

### Example

Place strategies that might improve access to fruits and vegetables; such as,

- Farmer's markets in low-income areas with no grocery stores.
- Adding fruits and vegetables to the selection at convenience stores.
- Improving menu options to include fruits and vegetables in fast food restaurants.



## Make Strategy Decisions

### Develop Promotion Strategy

Finally, you will develop a promotion strategy. This is more than just messages and advertisements. You may create messages and/or advertisements at some point, but only the ones that you find are necessary based on the audience research and that fit into the promotion part of your marketing mix. If you do create messages, make the connection back to your place strategy and think again about appropriate times and locations for messages.

Once you know your product and its benefits, the barriers you need to overcome, and the best placement of products, materials, messages, or services, then you can think about how you will promote that package. Mass communication may or may not be the most appropriate method of promotion. If your target audience is fairly broad and well-represented in the general population, you may want to think about options such as radio and TV commercials, advertisements or billboards. Other options include newsletters, announcements, and word of mouth. In most cases, if you've narrowly defined your target audience, you should be able to find effective methods of communicating to them that are reasonably priced. Person-to-person communications, Web sites, social networking sites, newsletters, and group meetings are just a few examples of other means of communicating with smaller target audiences.

### Resources<sup>3</sup>

Resources for developing communication messages and materials include the following

- [The Pink Book](#)  
National Cancer Institute

#### Media Advocacy Resources

- [Community Tool Box Chapter on Media Advocacy](#)  
University of Kansas
- [APHA Media Advocacy Manual](#) (PDF-76k)
- Book: *Media Advocacy and Public Health: Power for Potential*
- [Simply Put](#) (PDF-2.74Mb)

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<sup>3</sup> Resources that are not hyperlinked can be found at:  
<http://www.cdc.gov/nccdphp/dnpa/socialmarketing/training/resources.htm>



## Scenario 28

"Thinking through the 4 P's was a good way for us to think about our marketing strategy. We had several long discussions about each and went back and forth on quite a few points, but we finally negotiated what we think are going to be the best strategies for each of the 4 P's. That was tough!

Here's [our completed worksheet](#) (PDF-72k) if you want to see our decisions."

## Summary

By the end of phase 3, you should have a good outline and plan for your intervention. In phase 4, you'll focus on preparing the program's activities and details you'll need to get the intervention ready for implementation.

You should now be able to

- Explain the purpose of the strategy development phase and describe why it's important.
- Describe three general principles of the strategy development phase.
- Explain how to use evidence in the selection of interventions.
- List possible audience segments; analyze options, and select a target audience.
- Describe the benefits of a good audience segment description.
- Identify secondary audience(s).
- List possible behaviors to change; analyze options and select a behavior to change.
- Explain how to write SMART behavioral objectives.
- Explain what "marketing mix" is and define each component.
- Describe how each component of the marketing mix influences key strategy decisions.