Social Marketing Procurement

Developed & facilitated by Atlas Communications & Media

for the National Social Marketing Centre

Location: North-West

Date: June 2009
### Learning Outcomes

- Recap basic social marketing principles
- Understand the complex nature of social marketing procurement
- Understand how social marketing can be used to achieve world class commissioning
- Understand the planning process required for effective social marketing
- Understand the timeframes and organisational resources required.
- Understand the NSMC criteria which can be used for evaluating social marketing tenders
The 5Ps of social marketing

Product
Price
Place
Promotion
Partnerships
Benchmark criteria

- Customer orientation
- Clear focus on behaviour
- Informed by behavioural theory
- Insight – what moves/motivates?
- Exchange – increase benefits/reduce barriers
- Competition – internal/external
- Segmentation – targets specific audience groups
- Mix of methods – information/services/rules…
Group exercise 1

Put the benchmarking criteria in order of importance
Procurement = buying-in services

- Service delivery
- Service redesign
- Service improvement
- Reduction in inequalities
- Greatest health gains
- Return on investment
- Improved health outcomes
Why procure social marketing?

- Commissioner
  - WCC
  - Efficiency
  - Cost benefit

- Capacity
  - Timeframes
  - Targets
  - Resources

- Skills/expertise
  - Behaviour change
  - Target audience
  - Interventions

- Efficiency
Procurement excellence in social marketing

- Share intelligence and collaboratively plan with partners and stakeholders
Procurement excellence in social marketing

**Mindset**

- Are guided by what works drawn form a wide evidence base. Willingness to maximizing the use of best practice 'wherever invented'
Procurement excellence in social marketing

- Enable target communities to input into design delivery and evaluation
Procurement excellence in social marketing

- Specify behavioral outcomes & have a clear planning and evaluation process.

Behavioural goals & planning
Procurement excellence in social marketing

Ethics

- Consider & address ethical issues associated with the intervention
Procurement excellence in social marketing

- Systematically use insight & knowledge about target audiences plus other data and evidence to inform and shape
Procurement excellence in social marketing

- Rigorously monitor and hold suppliers to account for delivery to agreed levels
North-West Provider framework

• Multi-organisation stakeholder group
  - NHS NW, PCTs, PH Networks, NSMC
• North West NHS Collaborative Procurement Hub
• ‘OJEU’ process
• Rigorous and robust
• Fair and transparent
# Framework Agencies

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National Social Marketing Centre  www.nsmcentre.org.uk
Organisational benefits

Effective procurement of customer-focused social marketing

Improved impact & outcome of SM

Attainment of WCC competencies

Service improvements in quality, responsiveness & efficiency of service delivery

Improved customer understanding through relationships building & a focus on their needs
World Class Commissioning

Annual assessment process

11 competencies

4 point scale (level within 2 years)

World class health service
WCC competencies

1. locally lead the NHS
2. work with community partners
3. engage with public and patients
4. collaborate with clinicians
5. manage knowledge and assess needs
6. prioritise investment
7. stimulate the market
8. promote improvement and innovation
9. secure procurement skills
10. manage the local health system
11. make sound financial investments
Group exercise 2

Look at the World Class Commissioning competency your group has been given and discuss how procurement of effective social marketing can help an organisation achieve this competency.
Be a star

Promotes breastfeeding amongst 16-25 year olds

• 6 areas = 1200 target audience

Results

• Preston: 52% - 63%
• Cent Lancs: 52% - 63%
• Bolton: 65% - 82%

£52,000 budget

Example used with kind permission of The Hub
Benchmark Criteria

• Customer Orientation
  – Focus groups with mothers & peer network.
  Desk research.
  Qualitative research.
  Pretesting
Benchmark Criteria

• Behavioural Goals
  – To increase breastfeeding initiation rates by shifting community norms.
Benchmark Criteria

• Segmentation
  – Prioritisation of 4 deprived wards
  – 16 -25 year old Mums
  – White and mixed race
  – Peers, partners & families
Benchmark Criteria

• Methods Mix
  – Local ‘stars’ given a make-over
  – Peer supporters providing on-demand support
  – 24 hour peer support helpline in some area
  – Sms system other areas
  – Internal training
  – Website/blog/radio advertising
Lessons from Be a Star

- Accountability: Address differing cultures and work patterns
- Roles & responsibilities: Clarify clearly prior to commissioning
- Ensure the brief is clear: Be honest about ambiguous briefs
- Sustainability: Internal lead with capacity, authority & passion
- Establish objectives & challenges: Don’t make assumptions
- Measurement is key: Measure baseline and develop ongoing evaluation metrics
Research

Primary

Secondary

Qualitative research

Quantitative research

Academic research

Market research
Research

Using research

1. Can we use existing secondary research?
2. Do we need primary research?
3. Establishing a baseline is key for evaluation
4. Use research to inform your brief
5. Define your behavioural objectives
6. Move through scoping phase

National Social Marketing Centre
Planning your procurement

1. Scope
2. Develop
3. Implement
4. Evaluate
5. Follow-up
Before you even start...

- An organisation-wide understanding of what social marketing is AND isn’t
- A realistic understanding of what social marketing can deliver
- Human and capital resources
- An understanding of timeframes
- Project manager/named leader
Writing a brief

- Purpose
- Some background
- Budget
- Audience
- Required skills
- Timeframe
- Outline key relationships
- Engage
- Clear outputs
- Keep it concise
Writing a tender

- Keep the focus on the brief
- Include minimal procurement details

Different tenders for different stages /outputs
- Refer to table in toolkit lists outputs

Understand your obligations re procurement
- Legal requirements
- Organisational requirements

Good practise procurement
- Sound evaluation
- Good housekeeping
- Response & feedback
Group exercise 3

In groups, based on your scenario details, start to write a brief.
Evaluate your tender

Benchmark criteria

Develop a matrix against brief

Use a weighting system 0-4

Keep notes for feedback

Select for interview
Selecting an agency(ies)

What are you looking to ‘buy’ from the agency?

Flexibility in approach & delivery

Use preferred provider framework

Look for demonstrable experience in tender & pitch

Develop criteria for selection
Agency competencies

- Understanding & experience of social marketing
- Capability of delivery
- Sound company history
- Use of the benchmark criteria
- Transfer of knowledge
- Financial competence
The interview

- Checklist questions
- Develop a matrix for evaluation
- Rehearse
- Keep focussed
- Make a decision
- Feedback & evaluation
Group exercise 4

Role play exercise.
Write down 4 bullet points which would be given in an ‘ideal’ answer to each of the 4 questions given.
Liverpool’s Challenge: Lose a million pounds

Aim: Reduce levels of obesity by collectively pledging to lose a million pounds

Target audience: overweight/obese over 18s in Liverpool PCT area.

15 month high profile campaign

Example used with kind permission of Liverpool Primary Care Trust’s social marketing department
Liverpool’s Challenge

Multi-faceted campaign
Fun and engaging

Tanker, events, extensive media campaign and CRM techniques to engage and support.

Feb 09 – ½ million pounds pledged, 72% prompted awareness. 58% have lost weight

Example used with kind permission of Liverpool Primary Care Trust’s social marketing department
Lessons from Lose a Million Pounds

Have a vision
- Built on ‘being part of something’ ethos from City of Culture

Lead from within
- Strong social marketing team lead
- Provide building blocks for innovation

Internal partnerships
- Supportive steering committee allows access to skills, expertise and networks of others

Insight is key
- Develop and test overall concept, campaign strands, launch & implementation

Develop a project ethos
- Bring all agency partners together
- Be clear about expected collaboration

Build evaluation in:
- Allow you to tweak and improve delivery as you go & delivery effective reporting
Review

- Avoid panic buying
- Allow sufficient time to plan & implement
- Be strategic
- Threshold funding & sustainability
- Ensure ROI
- Sufficient resources to manage/review/adapt
- Accept that it is going to be challenging

Best-practice social marketing

Link into WCC competencies
NSMC support

- Commissioning Social Marketing Guide
- NSMC checklists & toolkit
- Showcase database
- North-West Regional Manager: Michael Hope
  M.Hope@nsmcentre.org.uk, 07500 975847
- Sub-regional public health networks
working together to realise the potential of effective social marketing

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