Planning and Delivering a Project to Influence Public Behaviour

ChaMPs training course

15 June 2011
Learning objectives

• Prepare to follow a systematic and effective planning process covering:
  – clear behavioural goals
  – developing a proposition
  – developing a product or service
  – the marketing mix
  – preparing for implementation
  – using communications appropriately
Session outline

• Purpose of development stage (15 mins)
• Developing SMART behavioural goals (15 mins)
• Creating a proposition (30 mins)
• Product and marketing mix (50 mins)
• Break (15 mins)
• Branding and communications (25 mins)
• Pretesting and preparing for implementation (10 mins)
• Tips for implementation (15 mins)
• Learning from session (5 mins)
The social marketing process

Developing a specific programme, campaign or intervention.
The social marketing process

The intervention goes live.
Work within a framework

- **Explore**
  - Insight

- **Enable**
  - Infrastructure
  - Facilities
  - Design
  - Resources

- **Encourage**
  - Legislation
  - Regulation
  - Incentives
  - Information

- **Exemplify**
  - Leading by example
  - Policy consistency
  - Organisational learning

- **Engage**
  - Deliberation
  - Permission
  - Co-production

- **Evaluate**
  - Evidence-based innovation

**MIND SPACE**

- **Explore**
- **Enable**
- **Encourage**
- **Exemplify**
- **Engage**
- **Evaluate**
Locating actions within the 4Es

**Enable**
- Infrastructure
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### Locating actions within the 4Es

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Nudging or more?

• How much – how far – should you intervene?
• Nudging is popular – but will nudging be enough?
Governments Nudged into Nudging

Some Governments like Liberal Paternalism and Nudging because:

- Simple concept
- Promise of easy solutions
- Low cost solutions
- Light touch change

Source: Strategic Social Marketing
But there are 5 big problems with this thinking

1. Top down and controlling (Paradox)
2. Does not engage or empower
3. Individualistic, does not address causality
4. Driven by understanding but not insight
5. No account of other new understanding

Source: Strategic Social Marketing
The value/cost exchange matrix©
4 Primary Forms of intervention

- **Active Decision**
  - Conscious / Considered

- **Incentive**
  - Reward
  - Nudge

- **Disincentive**
  - Punish
  - Automatic / Unconscious
  - Passive Decision Nudge

Source: Strategic Social Marketing
The value/cost exchange matrix

4 Primary Forms of intervention

Incentive
- Reward
  - eg: Reward for not smoking

Disincentive
- Punish
  - eg: A Fine

Active Decision
- Conscious / Considered
  - Hug

Nudge
- eg: A default saving scheme

Automatic / Unconscious
- Passive Decision Nudge
  - Shove

- eg: Restrictions on sale time and age for alcohol

Source: Strategic Social Marketing
The value/cost exchange matrix

4 Primary Forms of intervention

Social Marketing
Traditional Focus

Incentive
Reward

Active Decision
Conscious / Considered

Nudge

Automatic / Unconscious
Passive Decision Nudge

Disincentive
Punish

Smack

Shove

Hug

Source: Strategic Social Marketing
The value/cost exchange matrix©
4 Primary Forms of intervention

Social Marketing
Traditional Focus

Active Decision
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Source: Strategic Social Marketing

The social marketing gateway
Development
Purpose of Development

• Public sector practitioners talk about:
  – Developing or redesigning ... a Programme, Campaign, Project or Intervention

• Marketers talk about:
  – Creating a valued product or service

• Think about the value we are offering our target audience / customers
  – What we offer needs to be valued BY THEM
What is ‘it’ we are developing

There are clear differences in developing:
• a new or redesigned service
• a campaign to change behaviour
• a community development & engagement project
• an advocacy or policy change intervention

All of these can be the outputs of insight-led behaviour change planning process
Exercise - Think about something you have been part of developing

1. What was the desired behaviour change?

2. Who was the target audience(s)?

3. What did you develop?
Setting behavioural goals
What is the desired behaviour?

For each target audience segment

- behaviour and behavioural goals
- ‘insight’
- CONSUMER
- ‘exchange’
- intervention and marketing mix
- ‘competition’
- audience segmentation
SMART behavioural goals

**S** specific: set out clearly the behaviour promoted

**M** measurable: ensure it can be measured

**A** achievable: by the audience

**R** realistic: taking into account time /resources

**T** ime bound: need to have a clear timescale
Quick exercise

1. Consider an audience and a problem behaviour.
2. Write a ‘big’ SMART behavioural goal.
3. Can you think of any smaller (interim) behavioural goals (i.e. the steps along the way)?
Developing a proposition

The ‘offer’ or ‘idea’ that will move and motivate the audience to change behaviour
Finding the proposition: ‘the offer’

What we believe, based on insights, will help move people from current to desired behaviour (and sustain it)

- related knowledge, attitudes, beliefs, perceptions, values, emotional engagement

social marketing mix
with SMART behavioural goals

Adapted from Cork 2008
The proposition can be identified by an analysis of barriers and triggers

**Growing the desired behaviour**

**INCREASE:**
Build the rewards & benefits gained from the behaviour

**DECREASE:**
Remove or reduce any blocks or barriers in the way

**Reducing the problem behaviour**

**DECREASE:**
Remove or reduce the rewards & benefits gained from the behaviour

**INCREASE:**
Increasing blocks or barriers in the way – so harder to do
Example - raising uptake of diabetic retinopathy screening in Tower Hamlets
Example - diabetic retinopathy

**Current behaviour**
- High incidence of non-uptake of screening

**INSIGHT** - transience, misunderstanding, fear, motivated by possible wider loss

**PROPOSITION**
- You’ve a lot more to lose than your sight

**Desired behaviour**
- Respond to GP invitation and go for an eye test

**Social marketing mix** - new language (diabetic blindness); highlight loss of enjoyment of family; key role for local pharmacies; no paid for advertising

**SMART behavioural goal** - raise screening uptake from 60-70%
# Proposition checklist

<table>
<thead>
<tr>
<th>Checklist</th>
<th></th>
</tr>
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<tbody>
<tr>
<td>1. Has the proposition been developed based on clear audience/customer insights?</td>
<td>✓</td>
</tr>
<tr>
<td>2. Are there different propositions tailored to different needs and contexts of different audience segments?</td>
<td></td>
</tr>
<tr>
<td>3. Does the proposition clearly articulate what’s in it for the customer(s) or society as a whole?</td>
<td></td>
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<tr>
<td>4. Is it clear that the proposition is not simply a restatement of the intervention aims or policy goals?</td>
<td></td>
</tr>
<tr>
<td>5. Is it clear how the proposition will address or counter competition for the time and attention of the audience?</td>
<td></td>
</tr>
<tr>
<td>6. Is the proposition simple and straightforward to understand (i.e. a single line)</td>
<td></td>
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<tr>
<td>7. Is the proposition in everyday language?</td>
<td></td>
</tr>
<tr>
<td>8. Have those who need to follow up and contribute to components of the intervention been briefed and understand the reasons for the proposition?</td>
<td></td>
</tr>
<tr>
<td>9. Are pre-testing plans in place for the intervention components that have been developed based on the proposition?</td>
<td></td>
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Source: NSMC
Task

1. Pick a behavioural you wish to change
2. Decide on a proposition for one target audience
Developing the product and the marketing mix
How do we bring about the desired behaviour change? For each target audience segment:

- Behaviour and behavioural goals
- ‘Insight’
- Consumer
- ‘Exchange’
- ‘Competition’
- Audience segmentation

Intervention and marketing mix
Concept of ‘The Product’

Principle of delivering ‘valued benefits’

augmented
product or service

AUGMENTED: Additional features
e.g.: follow-up / warranty / locations

actual
product or service

ACTUAL: What is actually provided

core
benefits

CORE: the BENEFITS that the customer values from the product or service
Commercial sector example

**Augmented product or service**
- Customised interiors
- Choices of paint finishes
- Service package
- Warranty

**Actual product or service**
- Sports car
- Feeling great!
- Social status
- Sense of freedom
- Flexibility of travel

**Core benefits**
Public sector example

Augmented product or service

Flexible opening
A social environment
Friendly positive service
Accessible location

Actual product or service

NHS Stop Smoking Service

Core benefits

A sense of achievement
Feeling positive about self
Having more disposable cash
Supporting the family
We create valued benefits

The social marketing task

<table>
<thead>
<tr>
<th>Augmented product or service</th>
<th>Ensuring the context for developing the ‘product’ or intervention maximises its potential to be taken up and valued by the audience(s) e.g: flexible options and choices for people, promotion of their valued benefits</th>
</tr>
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<tbody>
<tr>
<td>Actual product or service</td>
<td>Making sure that the ‘product’ or intervention being developed is able to deliver ‘valued benefits’ (as below) and therefore able to support achievement of desired behaviour</td>
</tr>
<tr>
<td>Core benefits</td>
<td>Ensuring all work is based on a sound understanding and insight into what the people concerned will value as a benefit (rather than simply what those developing it believe to be a value)</td>
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</table>
Commercial marketers offer

We commonly offer:

**Short term BENEFITS**

Enjoyment now!

**Longer term COST consequences**

Health problems in later years

**Longer term BENEFITS**

Your health in 20 years time

**Short term COSTS**

Reduced pleasure now
Create valued benefits for the customer

**Turn**

- Longer term **BENEFITS**
- **Reduce**
  - Short term **COSTS**

**Into**

- More immediate **BENEFITS**
- **Make our ‘service’ or ‘product’ Fun, Easy & Popular**
Think about services and products – the 4 Ps of marketing

<table>
<thead>
<tr>
<th>SERVICE OR PRODUCT</th>
<th>What’s provided - e.g. specific service or activities</th>
</tr>
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<tbody>
<tr>
<td>PRICE</td>
<td>What it costs the customer - not just money, but also time, effort, social consequence. How can we lower the cost of engagement?</td>
</tr>
<tr>
<td>PLACE</td>
<td>BOTH where the activity is delivered AND where the customer can be reached and engaged</td>
</tr>
<tr>
<td>PROMOTION</td>
<td>The package of things that will highlight &amp; promote the activity &amp; incentivise/encourage participation</td>
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# More Ps of social marketing

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<tr>
<th><strong>Partnership</strong></th>
<th>• Working with others to maximise reach and impact of work</th>
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<tr>
<td><strong>Politics</strong></td>
<td>• Recognising impact of local and national political context</td>
</tr>
<tr>
<td><strong>Policy</strong></td>
<td>• Seeking to address organisational factors outside an individual’s control</td>
</tr>
<tr>
<td><strong>People – Public – Patients – Professionals</strong></td>
<td>• Focusing on supporting, encouraging, motivating and mobilising people – both the public and professionals</td>
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Case example – Smoking in pregnancy, Stoke-on-Trent

Using customer insight to shape service redesign
The challenge

- 22% of pregnant women smoking vs 17% nationally

- Existing local smoking cessation service – ‘Quit for a New Life’ - not engaging a key target audience

- **Insight** gathered into what women (i.e. the intended customers) would ideally want from a service for them

Customers’ voices used in service redesign
Customers’ voices

- Stop focusing on negatives and fears
- Stop nagging
- I’ve only one luxury in life
- It’s my only treat
- I smoke for a reason
- When they are telling me to stop, it makes me more determined
Acting on insight gathered

Mix of methods used:
• Staff training & adapted referral pathways
• Recruitment of new support workers
• Quit for a New Life service rebranded
• Me² Stop smoking club, focusing on 'me time' and stress management
• No appointments needed
• Free crèche provided
• Welcome pack & gifts

Results:
• 60% conversion rate
• 318% increase in quits in year
## Changes to the marketing mix

<table>
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<tr>
<th>SERVICE OR PRODUCT</th>
<th>The product was changed – redesigned around customer needs and staff behaviour changed</th>
</tr>
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<tr>
<td>PRICE</td>
<td>Cost of engagement lowered – easier, more convenient and attractive for customers to take up</td>
</tr>
<tr>
<td>PLACE</td>
<td>No change in location, but access made easier – e.g. drop in rather than appointment</td>
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<tr>
<td>PROMOTION</td>
<td>Branding and promotion of ‘a service for them’, plus other incentives (welcome packs)</td>
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Group exercise – Snack Right

• Who is the target audience/s?
• What are the behavioural goals – are they SMART?
• What’s the proposition or offer?
• What are the 4Ps in the marketing mix?
• Are there any other ‘Ps’ involved?
## Marketing mix (phase 1)

<table>
<thead>
<tr>
<th><strong>Product</strong></th>
<th><strong>Price</strong></th>
<th><strong>Place</strong></th>
<th><strong>Promotion</strong></th>
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<tr>
<td>Replace an unhealthy snack each day with a healthy snack</td>
<td>Parents’ time attending an event</td>
<td>Children’s centres</td>
<td>Fun events with supporting materials; Healthy Start vouchers; support from emerging; ambassador network; Support from health awareness via local media</td>
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Developing your plan
Outline of a social marketing plan

• The problem
• The resources / assets
• The people
• The behaviour
• Marketing objectives & behavioural goals
• Set out the proposition
• Product/service
• Monitoring and evaluation (NB – next course)
• Implementation plan
Branding and communications
Branding

Branding helps create and reinforce a tone or feel to a product or service (initiative / campaign / programme etc)

Branding should not be confused with ‘logos’

Is your brand an asset?

Is your ‘brand’:
- worthy / dull / boring / ‘do-goody’

Is your ‘brand’
- fun / interesting / exciting / socially acceptable
  relevant / encouraging / entertaining / etc

Leveraging an existing famous brand is usually more effective than inventing a new one
Communications

• Not all social marketing involves communicating messages

• The relevance of a message-based approach (or component to a strategy) should be considered to see if it might help achieve or sustain a given behaviour

• A message strategy should highlight and promote the relevant *valued benefits* being proposed/developed

• Important not to just communicate things those leading the project or programme will value
Communication content & style

• Messages used need to be directly linked to achievement of the behaviour
• Ensure messages are tailored to different audiences involved (tone, style, approach)
Message delivery

• What are you asking people to do?
• How are you asking them?
• Where are you asking them?

Example: ‘Stop smoking’ – here are two very different creative strategies.
Communication framework

Tailored communication

- Channels
- Methods
- Style
- Who
- Measuring the response
- When

Adapted from Brilliant Futures
Group Task – Populating the communications framework

Revisit Snack Right.
What are main elements in the communications framework?
Pre-testing / Formative evaluation
Pre-testing and refining

- Even well researched understanding and insights can fail in practice
- Pre-testing is a chance to check your hypotheses
- We might think something is excellent, but if the intended audience doesn’t it will have little real value to them and is unlikely to be effective
- Pre-testing can identify unintended consequences
Pre-testing and refining

Can include testing the following:

• The proposition and how motivating it is
• The extent that the ‘product or service’ will be valued and used
• The presentation of the product and related messages
• The potential impact on secondary audiences (people around the main audience who could have a reinforcing or undermining influence)
Pretesting: techniques

- Solution group
- Personal interviews
- Professional review
- Focus group / reference group
- Advisory group
- Piloting
- Hall testing
QUESTION

You have developed an intervention to encourage active travel to school, but do not have a budget pre-test. What might you do?
Implementation
Preparing to implement

• By the end of development it should be possible to produce a clear schedule for the Implementation stage.

• Clarify roles and responsibilities and schedule of key components.

• But project management can carry many pitfalls and surprises.
Discussion

What are the pros and cons of a launch event?
Tips

• Spot opportunities and manage problems
• Don’t let opportunities deflect the project from its core objectives or dilute your resources
• Gather feedback from staff and stakeholders
• Monitor and evaluate the process
• Monitor external developments
Monitoring tools

- Media monitoring
- Event questionnaires
- Bounceback cards
- Client satisfaction
- Analysis of call volume
- Coupons
- Website hits
Key learning points

• What are the main things that people have taken out of the session?

• What are the main learnings?
Resources

- www.socialmarketing-toolbox.com
- www.socialmarketinggateway.co.uk
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