Initial Planning Phase

Initial Planning

- Background, purpose, behavioral focus
- Situational analysis
- Identification of information gaps needed to develop marketing plan
- Develop formative research plan
- Conduct formative research

Plan Components

- Background statement
- Situational analysis
- Priority population
- Core product – Benefits offered
- Price – Costs and other factors to address
- Place – Distribution channels and partners
- Promotion – Promotional tactics
### Data-Based Marketing Plan

<table>
<thead>
<tr>
<th>Actual product</th>
<th>What behavior will we promote?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority population</td>
<td>Which segments will we give the greatest priority in our program planning?</td>
</tr>
<tr>
<td>Core product</td>
<td>Which benefits will we promise?</td>
</tr>
<tr>
<td>Position</td>
<td>How can we best distinguish our product from the competition?</td>
</tr>
<tr>
<td>Augmented product</td>
<td>Goods and services to enhance adoption?</td>
</tr>
<tr>
<td>Price</td>
<td>How can we lower costs and other key barriers?</td>
</tr>
<tr>
<td>Placement</td>
<td>Which partners should we mobilize? Which distribution channels should we use?</td>
</tr>
<tr>
<td>Promotion</td>
<td>Which spokespersons, information channels, message design guidelines, and activities should we use?</td>
</tr>
</tbody>
</table>

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### 1. Write Background Statement

- **Background:**
  - Write brief description of the problem or need for the program
- **Purpose:**
  - State your general purpose or goal
- **Behavioral focus:**
  - State a behavioral goal or focus

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### Select a Behavioral Focus

- **What if there is no behavioral determinant?**
- **How to select among multiple behaviors?**
Return on Investment

Assessing ROI

Likelihood of Adoption

Case Study Purpose

McKenzie Mohr 1999
**Case Study**

- Impact on problem
  - U Berkeley Center for Weight and Health
    - [http://www.cnr.berkeley.edu/cwh/activities/child_weight2.shtml](http://www.cnr.berkeley.edu/cwh/activities/child_weight2.shtml)

- Audience responsiveness
  - CDC list of promising interventions

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**Case Study**

- Impact
  - Parental modeling
  - Physical Activity
  - Fruits and Veggies

- Likelihood of Adoption

McKenzie Mohr 1999

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**Return on Investment**

- Impact
  - Responsiveness

McKenzie Mohr 1999
Exercise

- Background or problem statement:
- Purpose or goal:
- Behavioral focus:
  - Chart each behavior's impact and likelihood of being adopted
  - Note existing data sources

Other Existing Resources

- Impact on behavior
  - Peer review literature
  - Review articles
- Responsiveness
  - Program reports
  - Published evaluations
  - CDC’s Community Guide

Exercise

- Background or problem statement:
- Purpose or goal:
- Behavioral focus: List data sources
Other Existing Resources

- Impact on behavior
  - Peer review literature
  - Review articles
- Responsiveness
  - Program reports
  - Published evaluations
  - CDC’s *Community Guide*

2. Situational Analysis

- Strengths
- Weaknesses
- Opportunities
- Threats

Strengths

- Organizational resources
- Service delivery capabilities
- Partners
- Previous successes
**Weaknesses**
- Organizational resources
- Service delivery capabilities
- Partners
- Previous successes

**Opportunities**
- Demographic trends
- Cultural trends
- Economic forces
- Stakeholders
- Political forces

**Threats**
- Demographic trends
- Cultural trends
- Economic forces
- Stakeholders
- Political forces
Threats

Exercise

List one example for each
- Strengths of planning group
- Weaknesses of planning group
- Opportunities in external environment
- Threats in external environment

SWOT Analysis

- Organizational resources
- Service delivery capabilities
- Partners
- Previous successes
- Demographic trends
- Cultural trends
- Economic forces
- Stakeholders
- Political forces
3. Priority Population
- Primary audience
  - Whose behavior do you want to change?
- Secondary audiences
  - Influencers
  - Gatekeepers

Segmentation Schemes
- Undifferentiated
- Differentiated
- Concentrated

Undifferentiated
- One product
- One marketing strategy for everyone
- Imagine:
Differentiated

- Select several segments
- Design products for each

Automobiles

- Describe characteristics of segment that buys:
Secret tribe of people...with an educated, liberal arts orientation and into individual sports such as skiing and biking; they're the Patagonia crowd. Beetle drivers are a club for people who don’t join clubs.

**Beetle**

- Secret tribe of people...with an educated, liberal arts orientation and into individual sports such as skiing and biking; they’re the Patagonia crowd. Beetle drivers are a club for people who don’t join clubs.

**Concentrated**

- Select one or two segments
- Develop strategy for these groups
- Best for organizations with limited resources
What do public health professionals do?

Undifferentiated

Greatest Need
Reasons to Segment

- Optimize resource allocation
  - Return on investment
  - Voters
- Design most effective strategies for each segment selected
  - Contemplation versus action stage

Segmentation Process

1. Identify variables segmenting market
2. Evaluate segments
3. Select priority segments
**Segmentation Variables**
- Current Behavior
- User Status
- Readiness to Change
- Desired Benefits
- Psychographics
- Demographics (often weakest way to segment)
- Others

**Behavior**
- Past
  - Always
  - Occasional
  - Never user
- Current
  - Never
  - Sometimes
  - Always

**Readiness**
- Future intentions
- Stages of change
- Other
Personal Characteristics

- Demographics
- Life course
- Psychographics
- Others

Identifying Variables

- Literature searches
  - Use criteria identified in previous studies
  - Search for potential basis variables
- Key informant interviews
- Focus group interviews
- Surveys

Evaluate Segments

- Selection Criteria
  - Potential impact
    - Size
    - Need or benefits received
  - Responsiveness
  - Ready to change
  - Reachability
  - Match with organizational capacity
Return on Investment

Existing Data
   › CDC’s VERB research
Degree of Involvement

- Superstars
- Moderately involved but not passionate
- Passives
- High risk

Create Vivid Profile

- VERB data on tweens
  - Developmental challenges
  - Motivators
  - Lifestyle

Exercise

- Use your behavioral focus for this exercise
- List potential ways to segment
  - Consider current behavior
  - Consider readiness to change
- May combine into potential segments
Case Study

Middle high risk
Middle moderate
Elementary active

Responsiveness
Impact

McKenzie Mohr 1999

ROI

Responsiveness
Impact

McKenzie Mohr 1999

Exercise

- List ways to segment
- Identify existing data sources to map behaviors in terms of:
  - Impact
  - Responsiveness
- Identify ways to develop vivid profile
Exercise

- For each segment consider how would segment
- Identify data sources need to map segments in terms of
  - Impact
  - Responsiveness
- Identify ways to develop vivid profile

Review of Plan Components

- Background and behavioral focus or actual product
- Priority population
- Core product – Benefits offered
- Price – Costs and other factors to address
- Place – Distribution channels and partners
- Promotion – Promotional tactics

4. Identify Information Gaps
Positioning

- Distinctive place it occupies in consumer’s mind
  - How does it differ from competition?
  - What makes it uniquely better?
  - How do they feel about the product?

Effective Positioning

- Identify ways you can make it:
  - Unique
  - Important
  - Believable
Sustainable Competitive Advantage

- Makes actual product distinctively better
- Can be offered consistently over time
- Most powerful often:
  - Offer immediate returns
  - Are not related to preventive health

Competitive Analysis
Augmented Product

- Monitoring Device
- Cultural Passport

Price

- What do they exchange for benefits?
- What other factors impact behavior?

Role of Theory

- Provides list of potential variables
- Can categorize into:
  - External
  - Internal
External

- Societal
- Community
- Interpersonal

Internal Factors

Existing Data Sources
- Government datasets
- Government publications
  - CDC audience research
- Local program data
- Published literature
- Non–governmental agency reports
- Commercial marketing resources
  - Books, articles, journals
  - Companies that sell related products
Case Study

- VERB literature review
- IOM reports
- Peer review literature

Placement

- Make Physical Activity
  - Accessible
  - Location
  - Safety and supervision
- Mobilize Partners
  - Create action opportunities or outlets
Case Study

- Potential Spokespersons
  - Teachers
  - Parents
  - Local celebrities
  - TV and internet promising
Work Session
- List existing data sources and data collection strategies to identify:
  - Product benefits
  - Costs and other barriers
  - Places – locations, times, partners, distribution points
  - Spokespersons and information channels

Remember
- Goal is to identify
  - What you already know
  - What you need to learn
    - Possible existing data sources
    - Data collection goals

Work Session
- Summarize proposed data collection activities
5. Develop Research Plan

- Background, purpose, behavioral focus
- Situational analysis
- Identification of information gaps needed to develop marketing plan
- Develop formative research plan
- Design and conduct formative research