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>Category</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual product</td>
<td>What behavior will we promote?</td>
</tr>
<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

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

- Audience responsiveness
  - CDC list of promising interventions

Case Study

- Parental modeling vs. Physical Activity vs. Fruits and Veggies
  - Likelihood of Adoption
    - McKenzie Mohr 1999

Return on Investment

- Impact vs. 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

Strengths and Weaknesses

Opportunities and Threats
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.

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
Optimize resource allocation
- Return on Investment
- Voters

Design most effective strategies for each segment selected
- Contemplation versus action stage

Reasons to Segment

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

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**Create Vivid Profile**

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

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**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

McKenzie Mohr 1999

ROI

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

Product  Price  Promotion  Place
**Core Product**

- 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?

**Positioning**

- Identify ways you can make it:
  - Unique
  - Important
  - Believable

**Effective Positioning**
**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
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
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

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