Using an Innovative Computer Based Social Marketing Planning Tool to Address Public Health Issues:

**CDCynergy-Social Marketing Edition**
Version 2.0

USDA Food Safety Education Conference
Denver, Colorado
*September 28, 2006*
Want to do Social Marketing...?
Need Help...?
The Agenda

• Background: Turning Point; the CDCynergy concept

• *CDCynergy-SOC*: Formative research and product development

• *CDCynergy-SOC*: Exploration of the tool
Turning Point Social Marketing National Excellence Collaborative

• Robert Wood Johnson Foundation grant
• New York (lead state), Minnesota, Virginia, Illinois, North Carolina, and Maine
• Mission: Advance the use of social marketing in public health practice
• Strategy: Modify CDCynergy for social marketing applications
**CDCynergy Background**

- A CD-ROM/web-based tool for developing, managing and evaluating *health communication programs*
- Original version (now revised) underwent rigorous testing and evaluation
- Now available in a variety of specific applications (e.g., tobacco, micro-nutrients, cardiovascular health, etc.)
Who Needs Another CD?

**CDCynergy Strengths**
- Flexible logic model
- Based in science
- Planning template
- Emphasis on:
  - formative research
  - evaluation
- Highly adaptable
- Cool graphics

**Social Marketing Needs**
- “Closure” on the principles/model
- Structured and consistent method of application
- “Portable” tutorial
- Easy access to resources
# Social Marketing and Health Communication

- Communication and social marketing aren’t the same (Duh!)
- Effective social marketing programs frequently rely on communication tactics

<table>
<thead>
<tr>
<th>Points of convergence</th>
<th>Points of divergence</th>
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<tbody>
<tr>
<td>- Formative research</td>
<td>- Structural change</td>
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<td>- Evaluation</td>
<td>- Product</td>
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<td>- Planning</td>
<td>- Price</td>
</tr>
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<td>- Science</td>
<td>- Placement</td>
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<td>- Barriers &amp; benefits</td>
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Goal and Objective

Goal:
Advance the use of “best practice” social marketing by providing a planning tool like the communication version of *CDCynergy*.

Behavioral Objective: Public health managers and program staff will use the tool.
Modifying *CDCynergy* for Social Marketing Applications

Remember the **Social Marketing Elements**?

- Audience segmentation
- Formative research
- Strategy development
- Product design and testing
- Monitoring and evaluation
Formative Research Phases

• Feedback on *CDCynergy* from SM professionals

• Audience needs assessment
  – Stakeholders
  – Users

• Review of existing social marketing models
Feedback on **CDCynergy**

- **Purpose:** Assess potential of original version of *CDCynergy* (health communication) for conversion to a social marketing application
- **Computer-assisted laboratory exercise at CDC**
- **12 social marketing “experts”**
- **Findings:** strong potential, move forward
Target Audience(s) Survey

• Purpose: To learn about -
  • How social marketing is used in public health practice
  • Identify desired/useful characteristics of a social marketing program planning tool
  • Specific information/assistance needed by users

• Conducted by TP Social Marketing Collaborative

<table>
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<tr>
<th>Stakeholders</th>
<th>Users</th>
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<tr>
<td>• Association reps</td>
<td>• State and local level</td>
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<tr>
<td>• Trainers</td>
<td>• Varying access to resources</td>
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<tr>
<td>• Contractors</td>
<td>• Varying SM experience</td>
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<td>• Academics</td>
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Needs Assessment Findings

• Social marketing – an effective tool for behavior change
• CD-ROM format – useful for program planning
• CDCynergy – adaptable for use as social marketing planning tool
• Content – keep it simple
• Make it, we will use it! BUT, provide support!
Product Development
(Content)
Product Development Contract

• AED/Social Marketing Collaborative

• Phase I
  – Review formative research
  – Review existing SM models
  – Develop “logic model”
  – ID case studies

• Phase II
  – Write planning model scripts
  – Develop case studies
  – ID “on-board” resources
Product Development Principles

- Work closely with CDC and Social Marketing Collaborative
- Regular monitoring and reporting
- Expert review panel
- Adherence to logic model
- “User-friendly” tools, language and methods
Epidemiology
What causes health problem?
Who is at risk?
What behavior contributes to the risk?

Marketing
What benefits can I offer in exchange for their behavior change?

Communication
How can I communicate those benefits effectively?

Audience
Behavior

Teens
Smoking
Women
Cancer screening
Undergrads
Drinking
Etc.
Product Development (Technology)
CD-ROM Production

- Funded by CDC, Office of Communication
- Produced by Oak Ridge Institute for Science and Education (ORISE)
- Purpose: Modify *CDCynergy* architecture as needed and incorporate SM content, including:
  - Planning template
  - Resources (research, consultants, etc.)
  - Media examples
  - Navigation aids
Product Testing
Beta Testing

• Hosted by Minnesota Social Marketing Collaborative - Fall 2002
• Purpose: Evaluate “alpha” version of program using test website established by CDC
• Site: computer laboratory at University of Minnesota
• Test audiences
  – state public health administrators
  – local public health and CBO staff
The Tool
Computer Settings Guide

Use this guide to ensure that your computer has the needed software, plug-ins, and correct settings.

Step 1: Active Content Test

Your browser should be configured to allow active content to run on your computer. This will allow all links in CDCnergy to work properly.

To help protect your security, Internet Explorer has restricted this file.

If you received a message bar (on the opening page or this current page) saying that Internet Explorer has restricted the file, your browser is not set to allow active content to run. To allow active content, select "Tools," "Internet Options" from the menu bar. Click the "Advanced" tab at the top of the screen. Go to the "Security" section. If the following items are present, make sure they are checked:

- Allow active content from CDs to run on My Computer
- Allow active content to run in files on My Computer
Introduction to Social Marketing

- "Introduction to Social Marketing" (Video Segment - 6 Minutes)
- Approaching the Social Marketing Edition (Video Segments)
- Primer for Managers
- Is Social Marketing for You?
- Phases and Steps
- Key Social Marketing Concepts
Introduction

A full, clear problem description and analysis will help you decide whether to undertake a social marketing effort. If you do, the problem description will help you keep your main goal in mind.

In this Phase, you will:

- state your health or safety problem and the groups it affects
- identify the major causes of the problem
- draft a list of possible audiences for your program
- learn about previous efforts to address the problem
- form a strategy team
- identify issues and aspects of your situation that could affect the program’s success

You will rely on existing statistics and easy-to-find literature during this phase. If they leave some problem description or analysis gaps, you will fill them in with findings from the market research that you will conduct in Phase 2.
Introduction

2.1 Define your research questions.
2.2 Develop a market research plan.
2.3 Conduct and analyze market research.
2.4 Summarize research results.

In Summary, I collected information about it from experienced colleagues and the published scientific literature, and drafted a preliminary definition of your target audience.

Now, in Phase 2, you will conduct market research to understand the audience better and refine its definition. You will:

- spell out your market research questions
- select research methods to answer those questions
- take full advantage of data that were collected for other purposes
- collect supplementary data
- summarize your research results

Market research has two basic parts:

- audience research
- assessment of your program’s environment
Step 3.4: Write your behavior change goal(s).

What To Do

Now you can write benefit exchange statements. Together, they are the core of the strategic plan or “blueprint” for your program.

It’s also a good idea to take the time now to write about the rationale for the decisions you have just made in an audience profile. This document can be shared with other planners in later phases.

How To Do It

At this point you’ve identified the key target audience segments, the behaviors you want them to engage in, and what you will offer them in exchange.

Rewrite each audience segment/behavior couplet in the form of a benefit exchange statement that spells out the exchange. This condensed format makes it easier to explain the purpose of your program to stakeholders and partners.
Turning Point
Phase 2: Conduct Market Research

Step 2.1 Define your research questions.

Formative research aimed to collect consumer information needed to segment the population, identify important factors limiting breastfeeding, and define the methods to effectively promote breastfeeding. Some of the research objectives included:

- Identifying the perception of breastfeeding and bottle-feeding (formula) held by the audiences,
- Identifying the factors that motivate and deter the target audience group from breastfeeding and influencing audiences from encouraging breastfeeding, and
- Identifying effective information channels and spokespersons for promoting breastfeeding among WIC participants.

View Video Segment:
Carol A. Bryant
"Breastfeeding Costs"
(7 Minutes)

View Video Segment:
Carol A. Bryant
"Breastfeeding Benefits"
(3 Minutes)

Step 2.2 Develop a market research plan.
Phase 4 Resources

Budgeting
SEE ALSO: Low-cost social marketing

Budget Worksheet, fragment. Budget Worksheet

CCH Business Owners Toolkit is a website for small businesses with free activity start-ups, marketing, hiring and budgeting. Downloadable checklists documents: http://www.toolkit.cch.com

Costs for promotional items: Promo_Items_Cost_Sheet.pdf

Expense Portion of Budget Expense Portion of Budget

GuideStar houses a database of more than 700,000 U.S. non-profit organizations, budgets, timetables, activity charts, etc. http://www.guidestar.org

The Foundation Center's Learning Lab, Proposal Budgeting Basics, go to: for information about this resource and a short proposal writing course http://
Turning Point
Turning Point
Doer/Non-Doer Analysis

[Description] [Pros] [Cons] [Common Uses] [Resources]

Description

Doer/non-doer analysis is a general research analysis that can be applied to both quantitative and qualitative methods. By comparing members of an audience who do a behavior to those who do not, you can identify the factors that may be important for behavior change.

The doer/non-doer interview includes six open-ended questions about:

- The perceived consequences of performing the desired behavior (What do you see as the advantages or good things of performing the behavior? What do you see as the disadvantages or bad things of performing the behavior?);
- Self efficacy (What makes it easier to perform the behavior? What makes it difficult to perform the behavior?); and
- Norms (Who approves or supports you doing the behavior? Who disapproves or objects to you doing the behavior?)

Pros

- Can be used in both quantitative and qualitative research methods
- Limits your research focus to practical, relevant research questions
- Focuses on one, clearly defined behavior
Phase 1 - Problem Description
Step 1.1 - Write a problem statement
Step 1.2 - List and map the causes of the health problem
Step 1.3 - Identify potential audiences
Step 1.4 - Identify the models of behavior change and best practices
Step 1.5 - Form your strategy team
Step 1.6 - Conduct a SWOT analysis

Phase 2 - Market Research
Step 2.1 - Define your research questions
Step 2.2 - Develop a market research plan
Step 2.3 - Conduct and analyze market research
Step 2.4 - Summarize research results

Phase 3 - Market Strategy
Step 3.1 - Select your target audience segments
Step 3.2 - Define current and desired behaviors for each audience segment
Step 3.3 - Describe the benefits you will offer
Step 3.4 - Write your behavior change goal(s)
Step 3.5 - Select the intervention(s) you will develop for your program
Step 3.6 - Write the goal for each intervention

Phase 4 - Interventions
Step 4.1 - Select members and assign roles for your planning team
<table>
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<tr>
<th>TARGET AUDIENCE</th>
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<tbody>
<tr>
<td><strong>Behavior</strong></td>
<td>CHANGED</td>
</tr>
<tr>
<td><strong>Exchange</strong></td>
<td>BENEFITS</td>
</tr>
<tr>
<td><strong>Strategy</strong></td>
<td></td>
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</table>

**Through these intervention activities and tactics:**

<table>
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<tr>
<th>Behavior Change/Goal</th>
<th>Activities and Tactics</th>
<th>Program Delivery &amp; Reach Objectives</th>
<th>Outcome Objectives</th>
<th>Resources Needed</th>
</tr>
</thead>
</table>

**Turning Point**
1.6 Conduct a SWOT analysis.

Knowledge Check

Test Your Knowledge

Complete My Plan

Use the SWOT worksheet linked to Step 1.6 of My Plan to record the strengths, weaknesses, opportunities and threats that you have outlined, along with any ethical barriers to adopting particular interventions in your community. Next write a summary of eliminated approaches and ones that appear to be more attractive based on this.
For More Information

• Mike Newton-Ward, Social Marketing Consultant
  North Carolina’s Turning Point
  E-mail: mike.newton-ward@ncmail.net

• Social Marketing National Excellence Collaborative
  http://www.turningpointprogram.org/Pages/socialmkt.html

• TangibleData Media on Demand
  http://tangibledata.com/CDCynergy%2DSOC/Drivethru/index.cfm