



World Social Marketing Conference 2008

Brighton & Hove City, England, 29 – 30 September 2008

PLANNING

MANAGING COMPLEXITY

The Total Process Planning (TPP) framework

Behavioural Interventions & Social Marketing

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Trial version - help us pre-test this & other resources

National Social Marketing Centre

Planning framework

Behavioural Interventions and Social Marketing

Scope Develop Implement Evaluate Follow-up

Total Process Planning (TPP) framework

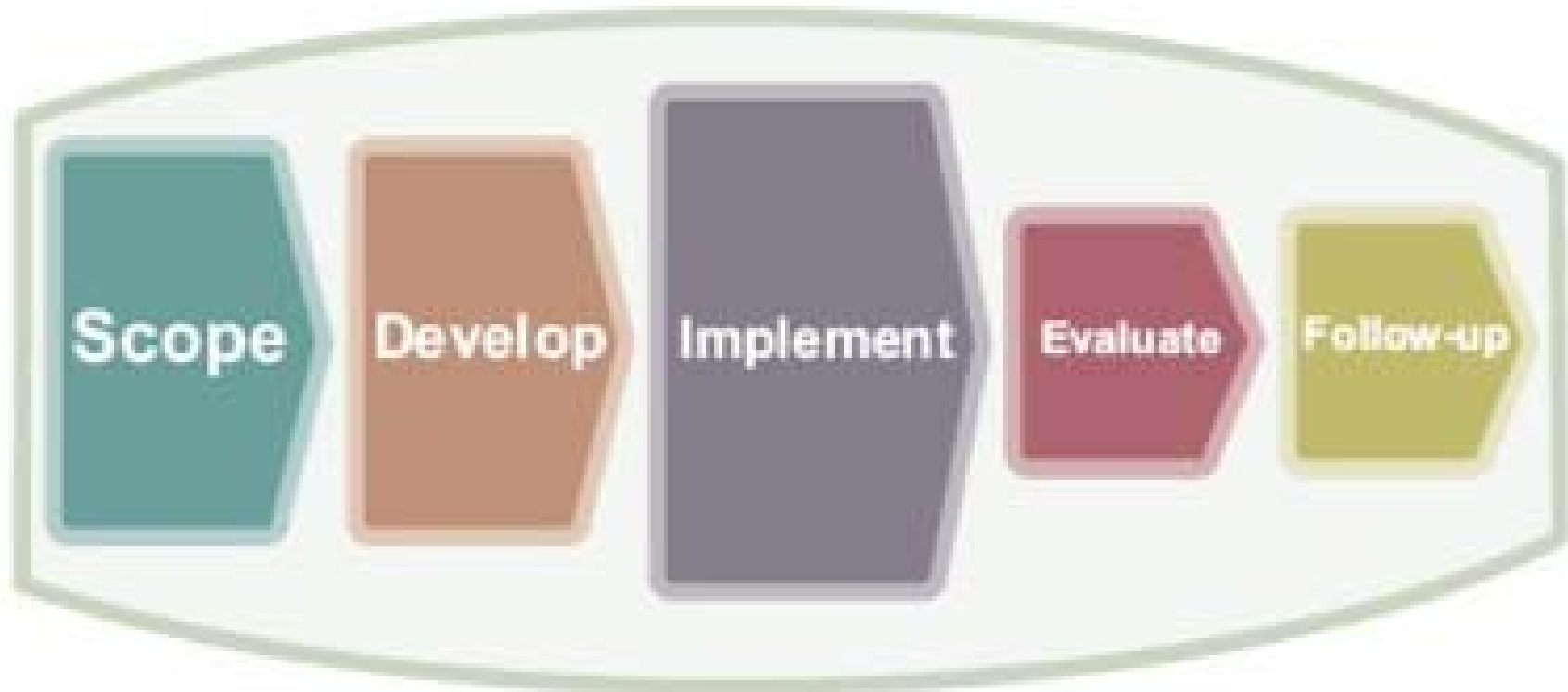
This is a short overview of a straight-forward planning framework (TPP), spotlighting some core features and tasks.

It provides a practical framework in which to plan and manage the range of tasks required when developing and delivering effective behavioural interventions, based on core social marketing principles.

While the main stages (Scope, Develop, Implement, Evaluate, Follow-up) should be considered as sequential, the way tasks are undertaken and managed within each stage are rarely such. Undertaking them requires a flexible approach tailored to different circumstances and contexts.

A fuller Planning Guide and related resources and tools are currently being developed and will be available later in the year. Visit www.nsmcentre.org.uk for details.

'Total Process Planning' (TPP) framework



England: Social Marketing strategic approach

STEP 1: 2004

**Government
Commitment
to review**

STEP 2: 2006

**Independent
Review**
undertaken by NSM Centre

STEP 3: 2008

**Dept of Health
official strategic
response**

HM Government

DH Department of Health



Working in partnership across government with people, their communities, local government, voluntary agencies and business

NHS

National Social Marketing Centre

It's our health!

Realising the potential of effective social marketing

Summary



Independent review, findings and recommendations

NCC National Consumer Council
Making all consumers matter

DH Department of Health

Ambitions for health

A strategic framework for maximising the potential of social marketing and health-related behaviour



Social marketing: putting people at the heart of policy, communications and delivery to encourage behaviour change

NHS

What do we mean by Planning in a Social Marketing context?

WHAT to do?

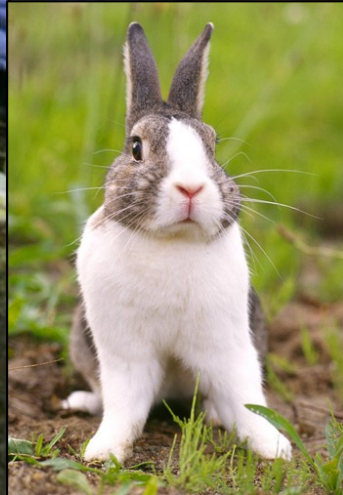
HOW to do it?

In short time now it's more about

'How to approach'

**But always more
than one way
*'to skin a rabbit'***





Reality check – how do we go about planning in practice?

A short multiple choice

Take text book from the shelf (internet!)...

- a) ...systematically follow its advice
- b) ...pick & choose the bits I like
- c) ...ignore it & do what I've always done

**...just get stuck-in
& hope it'll all pan out**

Integrating thinking & learning

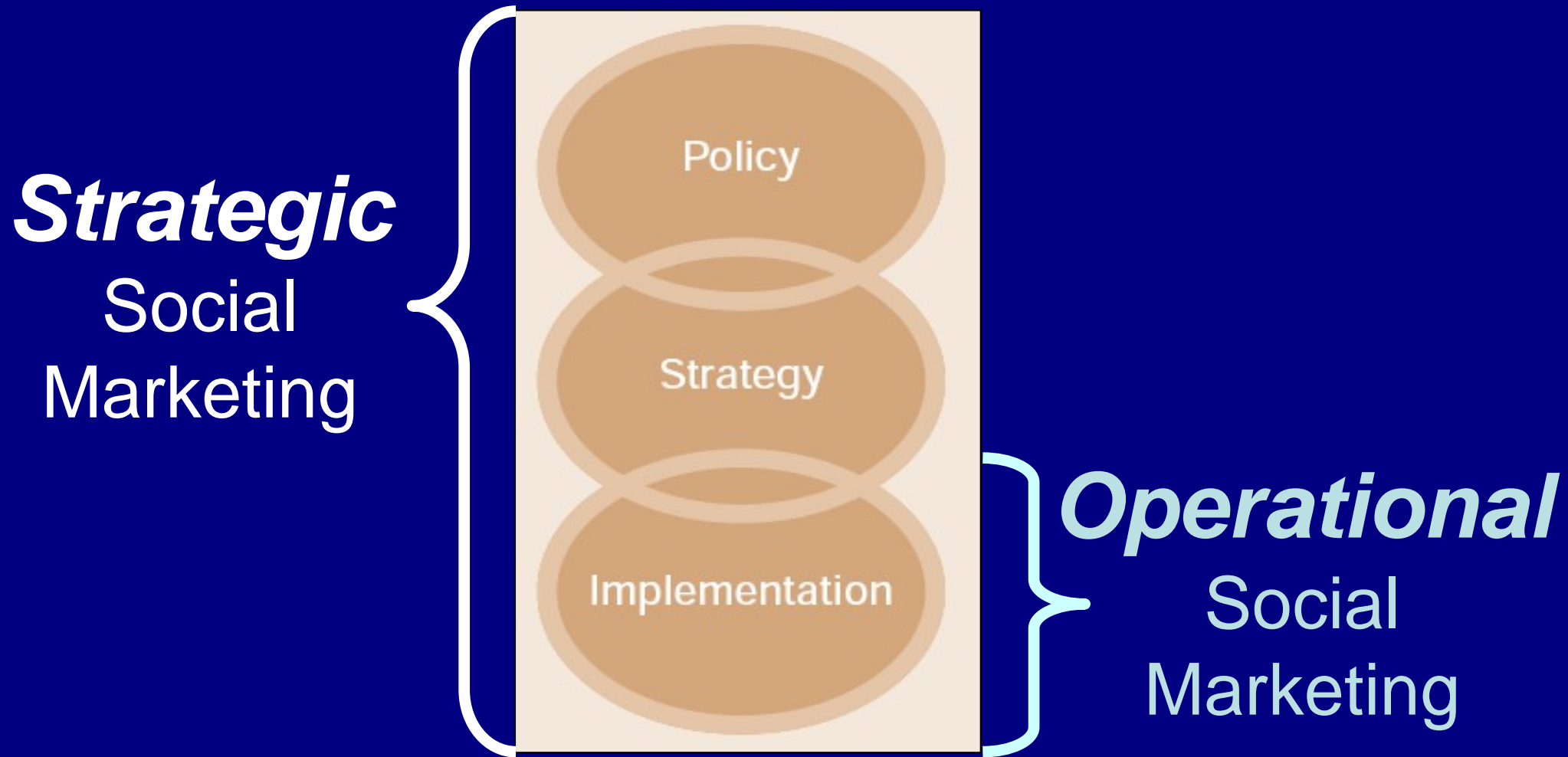
**Project & Programme
Planning**

&

**Key Social Marketing
Principles & Tasks**

Planning what?

Checking out how we are approaching the task



Planning what?

Checking we are using language in similar way

Programme

Social Marketing Programme

Used to refer to a longer term planned programme of work

Typically staged over 3 to 10+ years



Campaign

Social Marketing Campaign

commonly consisting of a range or cluster of activities

Typically staged over 1 to 3 years

Intervention

Social Marketing Initiative

used to refer to a time specific targeted intervention

Typically undertaken within 1 year



Social marketing National Benchmark Criteria

National 8 point Benchmark Criteria

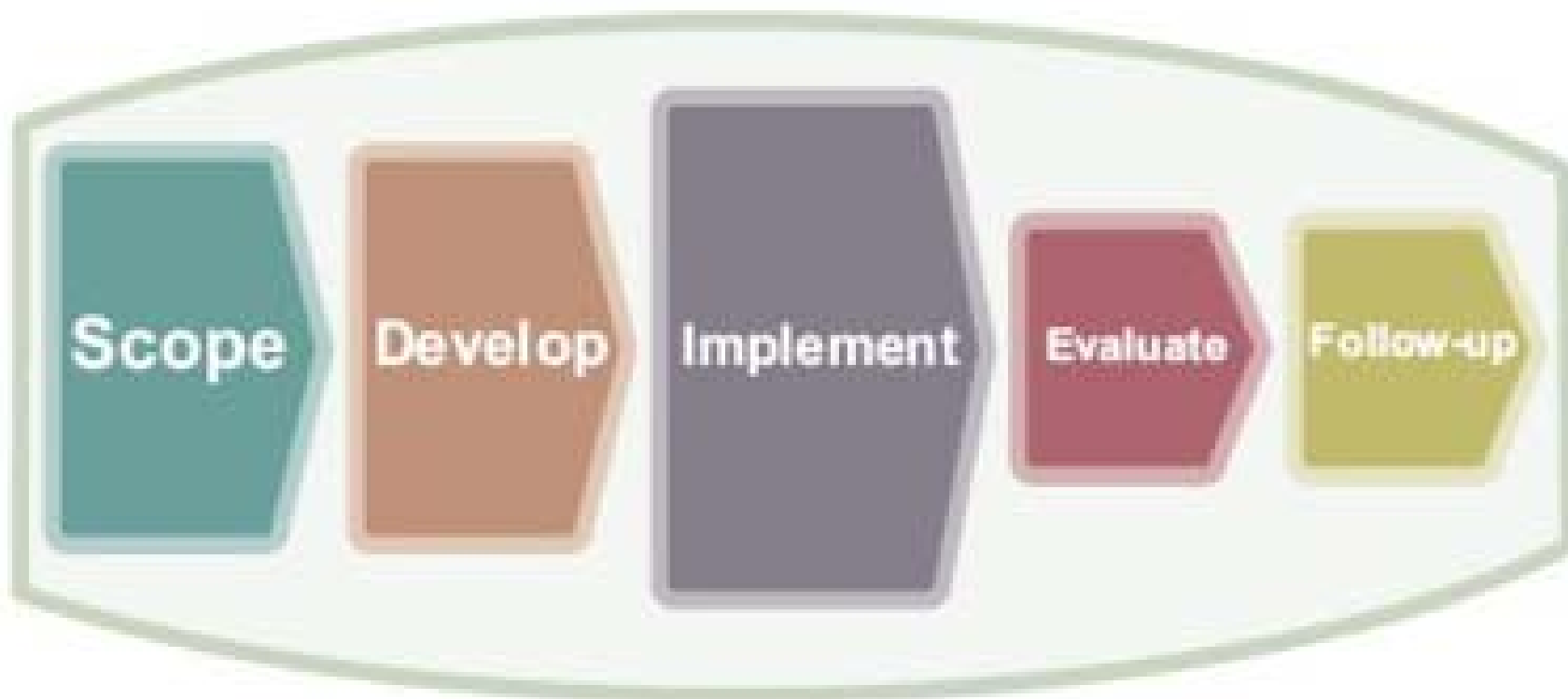
Key features to look for to determine if something is consistent with social marketing

Not to be confused with 'a process' of what you do

Not 'a plan'

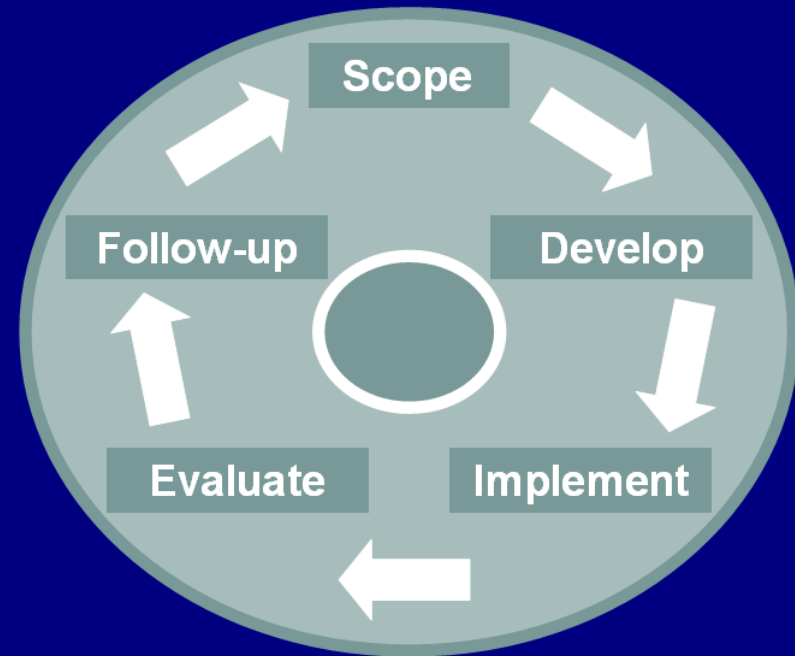
Benchmark	What to look for
<p>1. CUSTOMER ORIENTATION <i>'Customer in the round'</i> Develops a robust understanding of the audience, based on good market and consumer research, combining data from different sources</p>	<ul style="list-style-type: none"> A broad and robust understanding of the customer is developed, which focuses on understanding their lives in the round, avoiding potential to only focus on a single aspect or features Formative consumer / market research used to identify audience characteristics and needs, incorporating key stakeholder understanding Range of different research analysis, combining data (using synthesis and fusion approaches) and where possible drawing from public and commercial sector sources, to inform understanding of people's everyday lives
<p>2. BEHAVIOUR Has a clear focus on behaviour, based on a strong behavioural analysis, with specific behaviour goals</p>	<ul style="list-style-type: none"> A broad and robust behavioural analysis undertaken to gather a rounded picture of current behavioural patterns and trends, including for both <ul style="list-style-type: none"> – the 'problem' behaviour – the 'desired' behaviour Intervention clearly focused on specific behaviours <ul style="list-style-type: none"> ie not just focused on information, knowledge, attitudes and beliefs Specific actionable and measurable behavioural goals and key indicators have been established in relation to a specific 'social good' Intervention seeks to consider and address four key behavioural domains: <ul style="list-style-type: none"> 1: formation and establishment of behaviour; 2: maintenance and reinforcement of behaviour; 3: behaviour change; 4: behavioural controls (based on ethical principles)
<p>3. THEORY Is behavioural theory-based and informed. Drawing from an integrated theory framework</p>	<ul style="list-style-type: none"> Theory is used transparently to inform and guide development, and theoretical assumptions tested as part of the process An open integrated theory framework is used that avoids tendency to simply apply the same preferred theory to every given situation Takes into account behavioural theory across four primary domains: <ul style="list-style-type: none"> 1: bio-physical; 2: psychological; 3: social; 4: environmental / ecological
<p>4. INSIGHT Based on developing a deeper 'insight' approach – focusing on what 'moves and motivates'</p>	<ul style="list-style-type: none"> Focus is clearly on gaining a deep understanding and insight into what moves and motivates the customer Drills down from a wider understanding of the customer to focus on identifying key factors and issues relevant to positively influencing particular behaviour Approach based on identifying and developing 'actionable insights' using considered judgement, rather than just generating data and intelligence
<p>5. EXCHANGE Incorporates an 'exchange' analysis. Understanding what the person has to give to get the benefits proposed</p>	<ul style="list-style-type: none"> Clear analysis of the full cost to the consumer in achieving the proposed benefit (financial, physical, social, time spent, etc.) Analysis of the perceived / actual costs versus perceived / actual benefits Incentives, recognition, reward, and disincentives are considered and tailored according to specific audiences, based on what they value
<p>6. COMPETITION Incorporates a 'competition' analysis to understand what competes for the time and attention of the audience</p>	<ul style="list-style-type: none"> Both internal & external competition considered and addressed <ul style="list-style-type: none"> – Internal eg psychological factors, pleasure, desire, risk taking, addiction etc – External eg wider influences / influencers competing for audience's attention and time, promoting or reinforcing alternative or counter behaviours Strategies aim to minimise potential impact of competition by considering positive and problematic external influences & influencers Factors competing for the time and attention of a given audience considered
<p>7. SEGMENTATION Uses a developed segmentation approach (not just targeting). Avoiding blanket approaches</p>	<ul style="list-style-type: none"> Traditional demographic or epidemiological targeting used, but not relied on exclusively Deeper segmented approaches that focus on what 'moves and motivates' the relevant audience, drawing on greater use of psycho-graphic data Interventions directly tailored to specific audience segments rather than reliance on 'blanket' approaches Future lifestyle trends considered and addressed
<p>8. METHODS MIX Identifies an appropriate 'mix of methods'</p> <p>'Intervention mix' = Strategic SM 'Marketing mix' = Operational SM</p>	<ul style="list-style-type: none"> Range of methods used to establish an appropriate mix of methods Avoids reliance on single methods or approaches used in isolation Methods and approaches developed, taking full account of any other interventions in order to achieve synergy and enhance the overall impact Four primary intervention domains considered: <ul style="list-style-type: none"> 1: informing / encouraging; 2: servicing / supporting; 3: designing / adjusting environment; 4: controlling / regulating

'Total Process Planning' TPP as a *planning* model

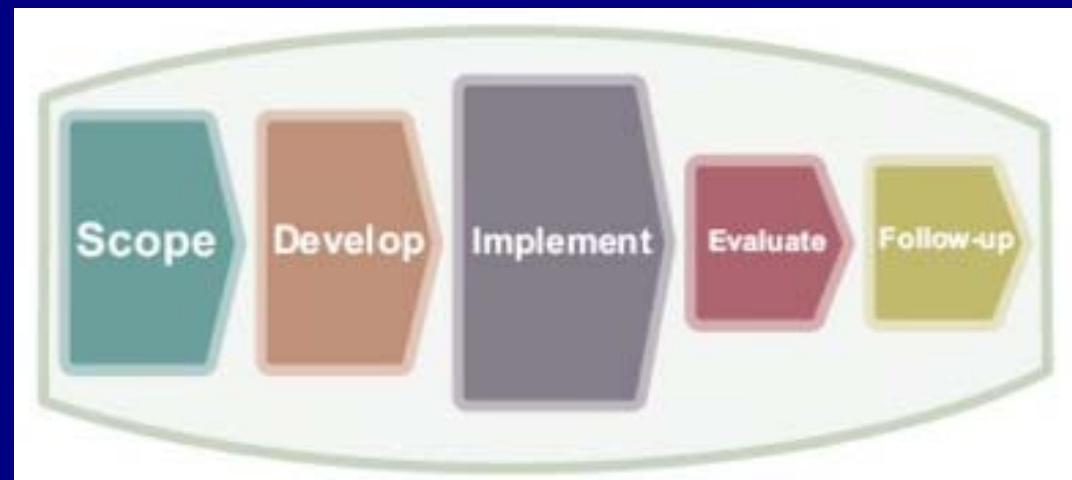


'Total Process Planning'

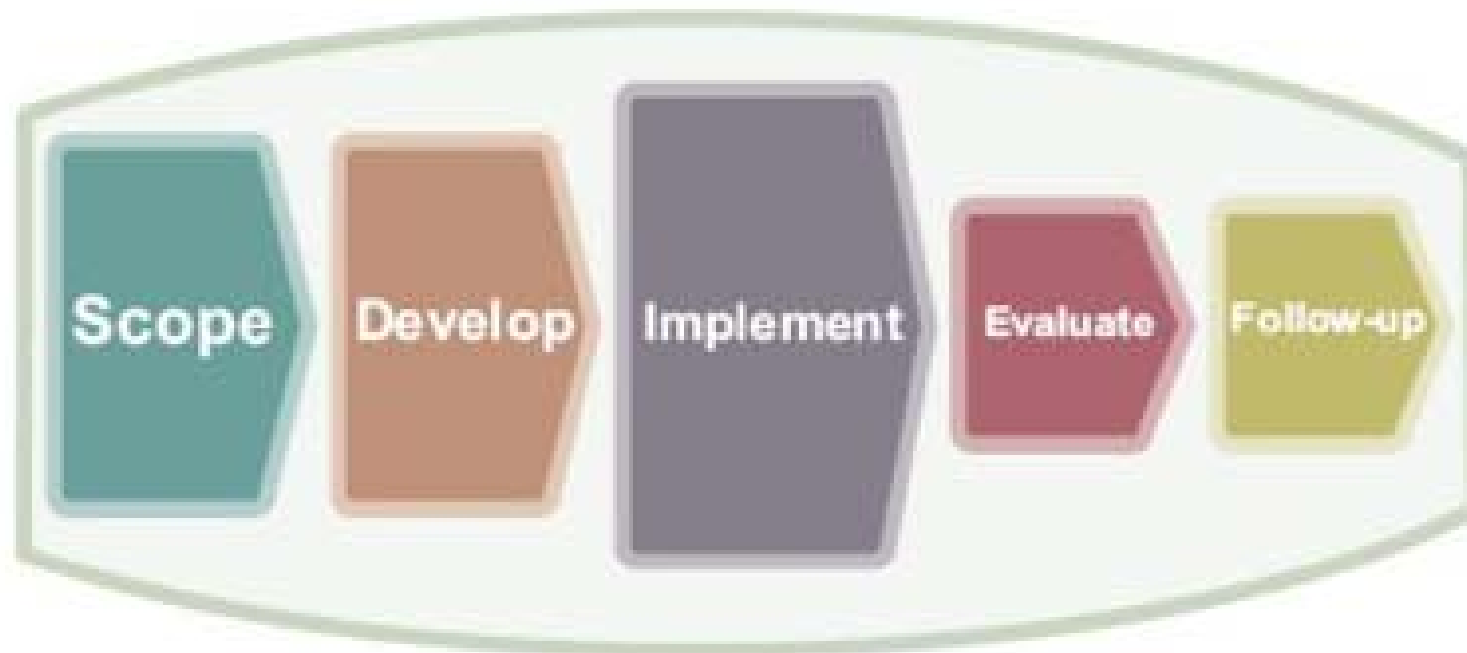
*A conceptual
model*



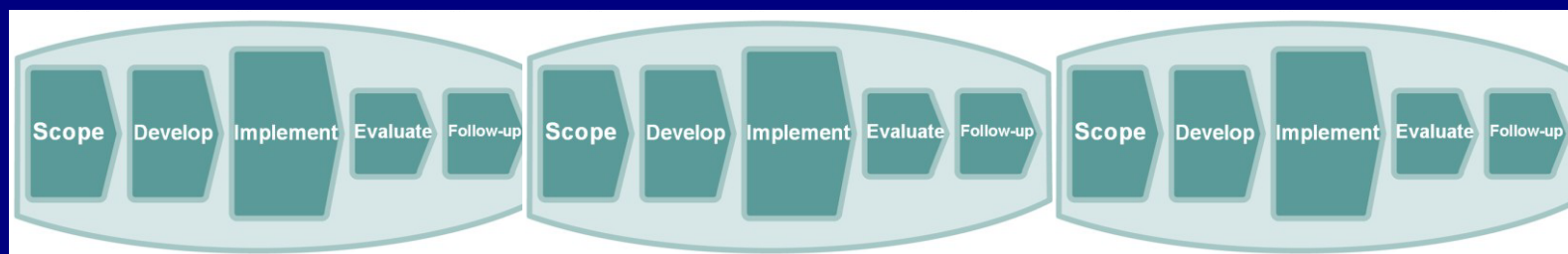
*A planning
framework*

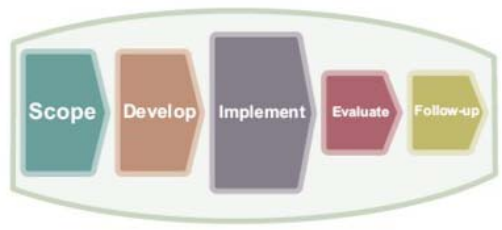


'Total Process Planning' TPP as a *planning* model



**Developing a longer-term Programme
with a series of linked Campaigns or Interventions**





Key things to highlight about the TPP framework

Don't be fooled by it's simplicity

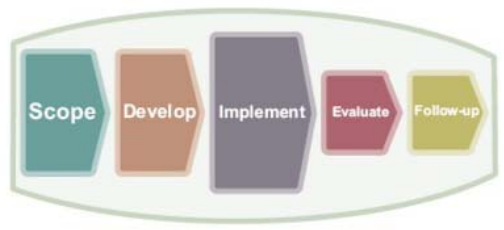
Managing the complexity

Keeping '*stages*' distinct – sequential

A major challenge

Recognising '*tasks*' are rarely sequential

Flexible, adaptive, iterative



Commissioners & Practitioners Guidance note

Invest in Scoping

This can save money, time and other resources

Commission in stages

Avoid single contract to cover everything
'block buying'

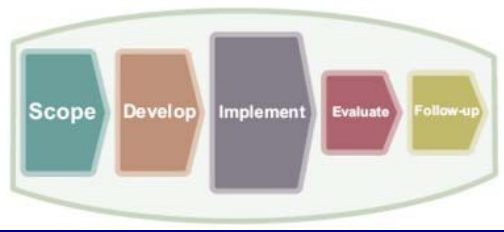
Use the simple 8 point benchmark sheet

Ask those tendering to indicate how whatever they are proposing will be consistent with them

Beware...

"We already know what needs to be done...."

"Here's one we prepared earlier..."

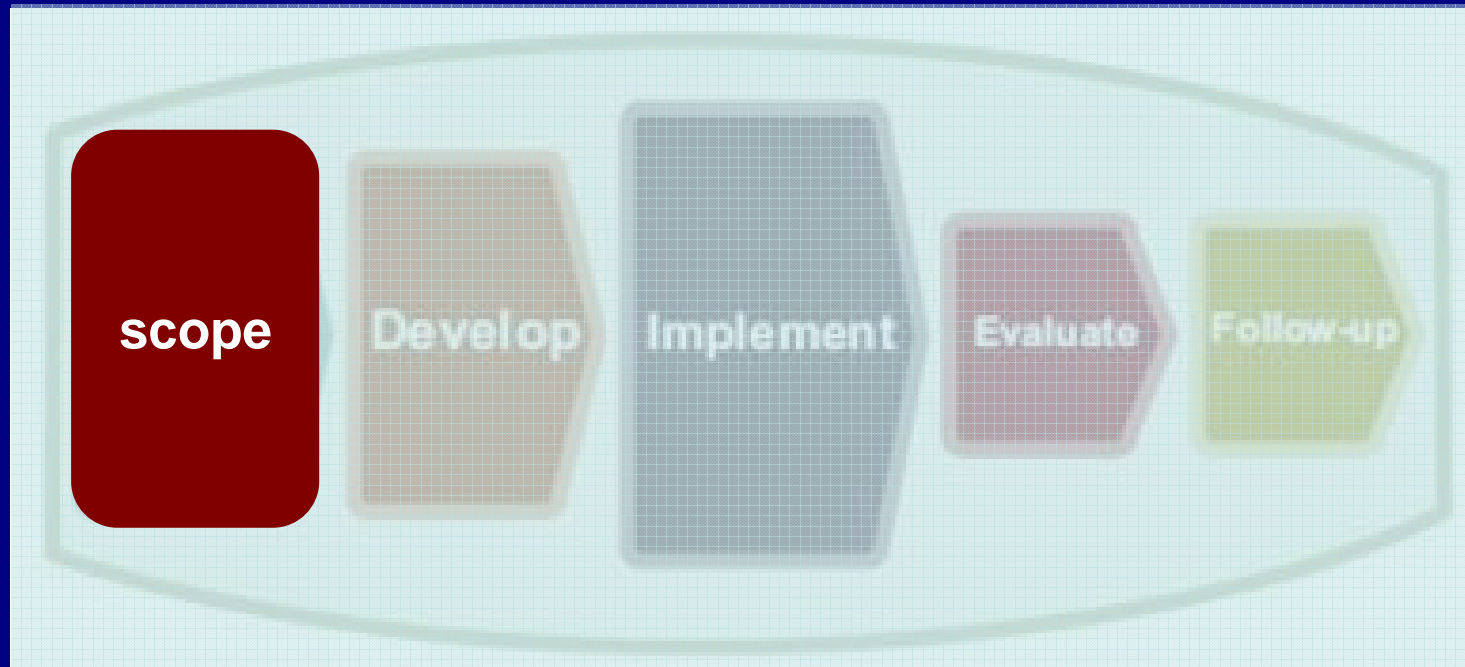


Benefits of effective Scoping

Beyond helping avoid an unquestioned rush to communications or 'social advertising' it can help by:

- a: Significantly enhance effective **stakeholder engagement** & involvement.
- b: Directly assist subsequent **review & evaluation**
- c: Enhance the evidence base and **help others learn / benefit** from the work

Scoping



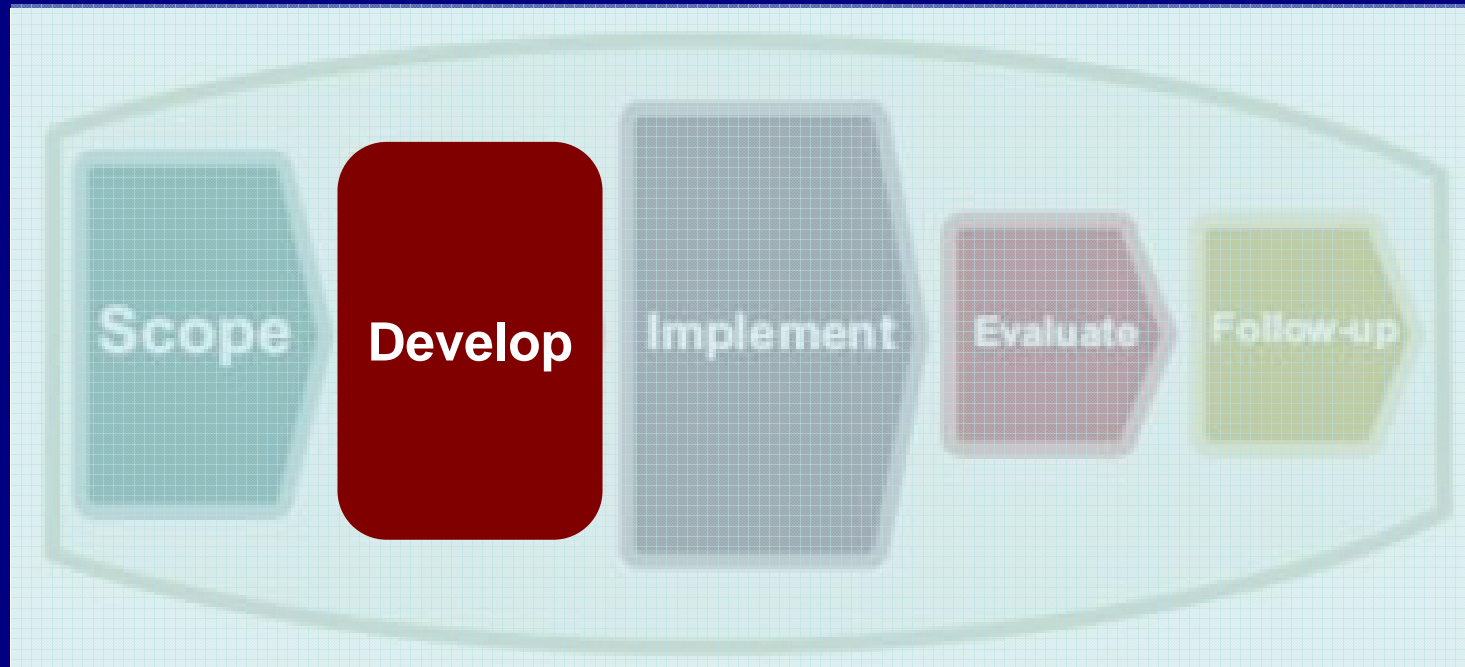
Where you examine the issue or challenge

Build a robust understanding of the audience & behaviour

Consider the resources (human & financial) available

Select the intervention options believed most likely to have a positive impact on the lives of those being addressed

Development

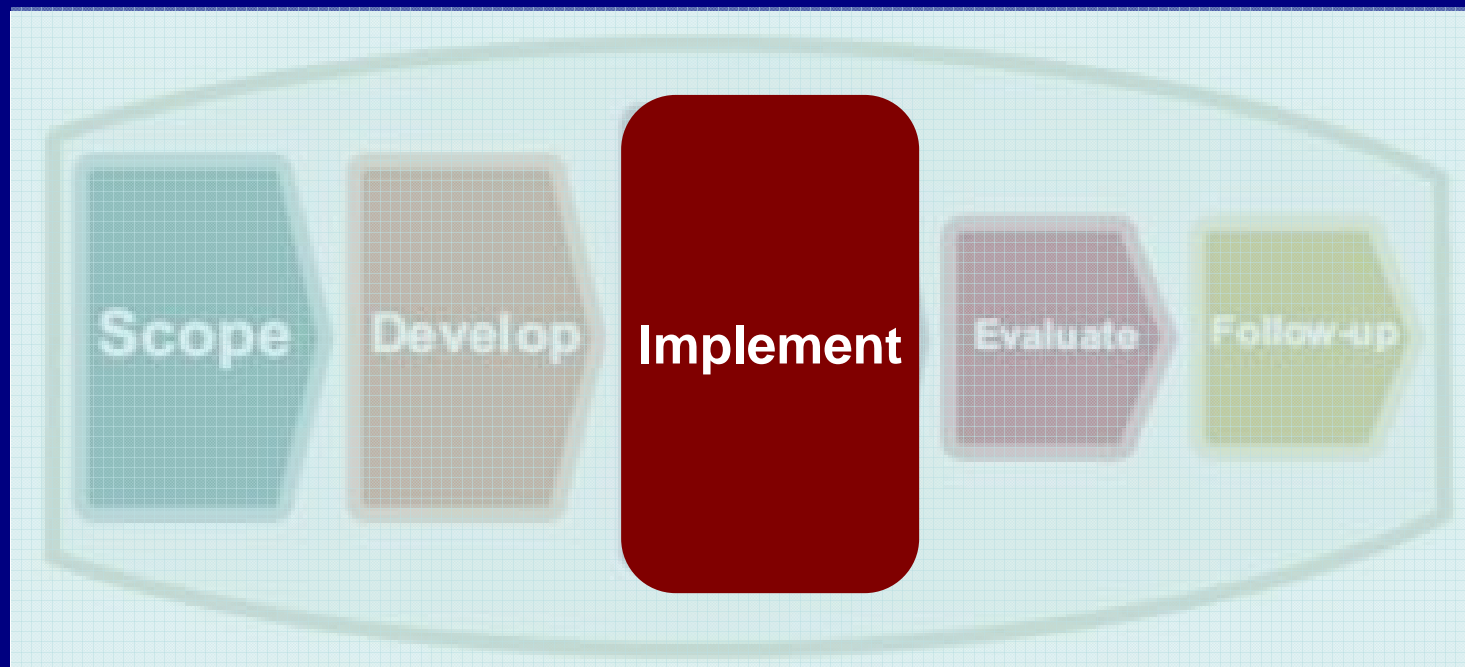


Where the behavioural goals and audience insights from ‘Scoping’ are taken and developed

Includes specific audience pre-testing of ideas / options

Checking if the evidence and assumptions made during scoping are relevant and actionable.

Implementing



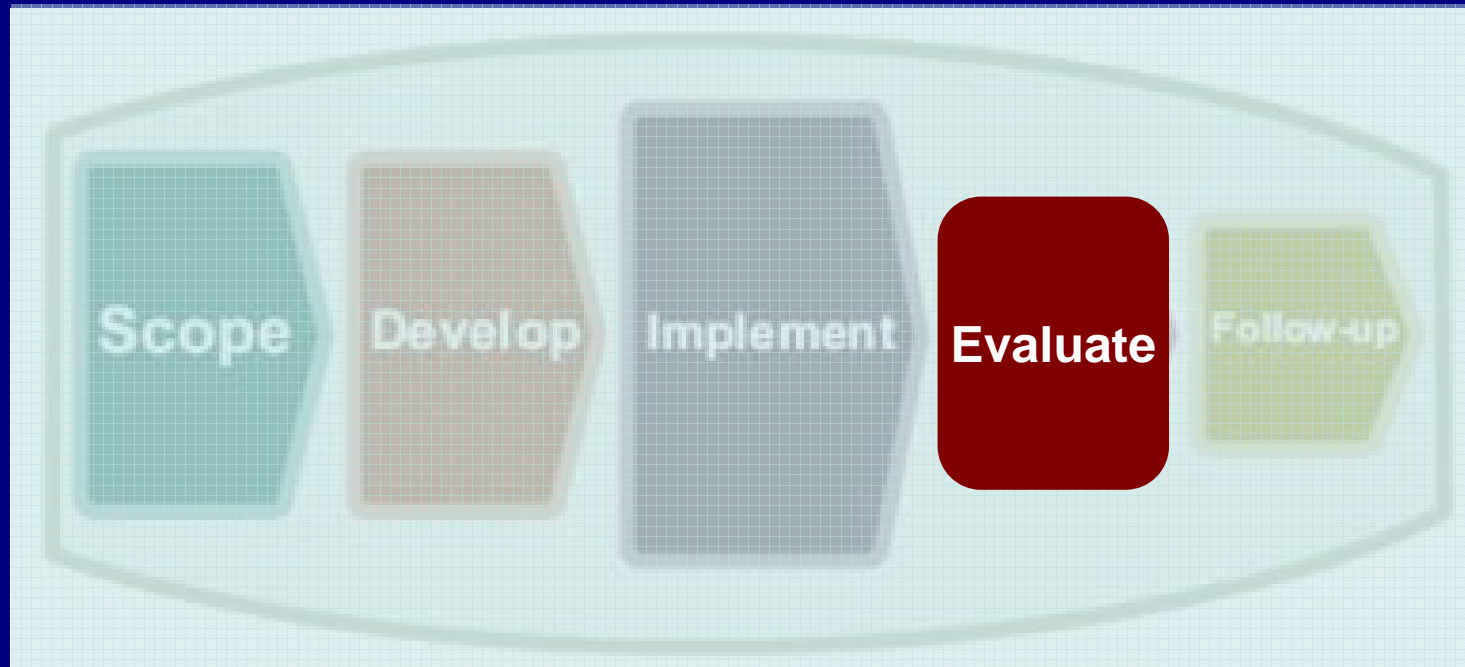
Where you 'go live' with the programme, campaign or intervention

Will vary according the approaches and methods selected during Scoping & Development

Live tracking, opportunity spotting & threat management

Data capture

Evaluating



Where original aims & objectives formally revisited

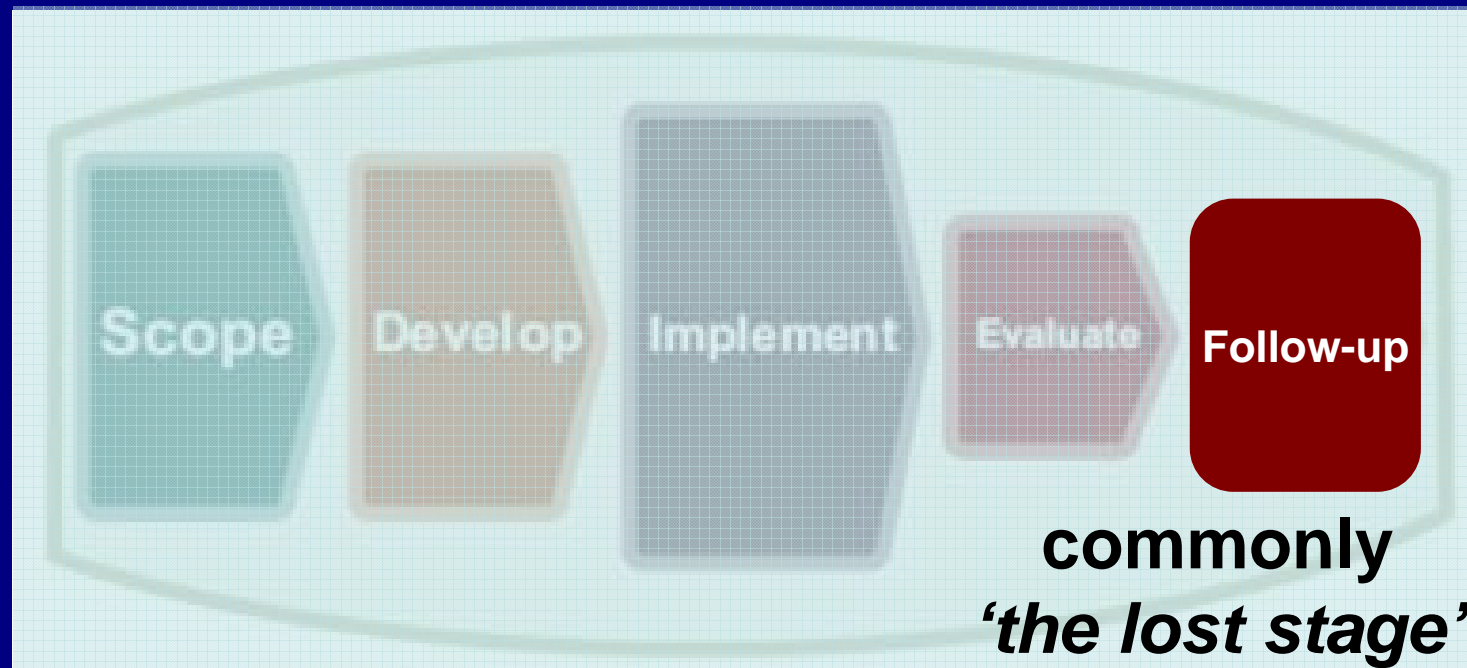
Where baseline and process data captured is examined

Where extent of outcomes are assessed

Where cost-effectiveness considered

Where implications and ideas for further work set down

Following-up



Where time dedicated to considering the evaluation findings with key stakeholders and decision-makers

Implications for future work considered

Where learning and evidence from the work is disseminated (published / web) so available for others

Thank you

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