

SOCIAL MARKETING PLANNING PROCESS

PHASE	STEP	TECHNIQUE EXAMPLES	MARKET RESEARCH SUPPORT	FEEDBACK LOOPS
Scope	1) Purpose & Focus: "Environmental Scan"	Literature reviews, epidemiological and scientific data.	Broad based secondary research, interview industry experts.	
	2) Situation Analysis	SWOT analysis, peer reviews.	Employee research, interview industry experts.	
Select	3) Target Audience	Evaluate segments and prioritize them. Determine the segment(s) to focus on.	Segmentation study, clustering.	
	4) Behavior Objectives & Goals	Set behavior, knowledge, and belief objectives. Consider preliminary budget.		
Understand	5) Barriers, Benefits, & Competition for the Behavior	Gather information on knowledge, attitudes, practices, and beliefs.	Use a supplier to conduct focus groups. Do your own literature reviews of existing research.	Findings at this step may suggest adjustments to the target audience and/or behavior objectives and goals.
Design	6) Positioning Statement	Test and develop an approach that will stand out in the mind of the target audience.	Use a research supplier to conduct focus groups.	
	7) Marketing Mix	The 4 Ps: Product (the desired change), Price (financial and non-financial), Place (where and when to make the change), Promotion (where you will deliver your message).	Use a research supplier to conduct focus groups to evaluate executions and messaging.	A pre-test of draft strategies may suggest changes in the 4 Ps design.
Manage	8) Evaluation Plan	Figure out what you need to evaluate, when you will conduct the evaluation, and how you will measure change.	Use a research supplier to run quantitative tracking studies, focus groups, intercepts, or observational research.	Determine what testing and metrics will be used to evaluate success.
	9) Budget	Identify costs related to your approach.		
	10) Plan to Implement	Finalize your implementation plan by answering who, what, when, and how much.		

Adapted from Social Marketing: Influencing Behaviors for Good, by Nancy Lee and Philip Kotler, 2011.

