

SOCIAL MARKETING TRAINING

Introduction

Social marketing is increasingly being adopted as a standard practice for organizational training programs. Employed effectively for years in the public health sector, social marketing focuses on the marketing exchange inherent in any effort to change behavior. People are persuaded to change behavior based on what they get in exchange for that change, whether it be a payment, reward, or simply a feeling of usefulness or acceptance. Social marketing encourages voluntary behavior change by unearthing these kinds of behavioral determinants through market/audience research, then repackaging, restructuring and replacing what the target audience is being offered. As agencies increasingly move from mandatory programs to voluntary ones and focus on mass behaviors that produce organizationally beneficial results, this kind of behavior focused approach is increasingly required.

The goal of the training would be to build both in-house expertise and some experience putting together a social marketing plan. This would require both lecture and workshop segments that provide hands-on experience working with your current organization's programs.

What follows is a proposal to fulfill your training needs while also using a social marketing methodology for a specific current program. The concept is to build capacity through the use of marketing professionals experienced both in training and executing social marketing campaigns so your staff and selected partners can learn by doing.

Our Approach

Salter Mitchell / Marketing for Change Inc. Inc. (SM/M4C) offers social marketing workshops that combine learning with planning. Participants in these workshops apply a set of marketing tools to their real-life programs: identifying targets of opportunity; assessing barriers and benefits; and selecting effective and affordable tactics that fit within the limits of their programs. They leave with a new outlook on changing behavior—and the beginnings of a new implementation plan.

This is a clear break from some traditional training approaches that focus more narrowly on passing along information. Returning from training in those cases can feel like re-entering the atmosphere after a mission to Mars. The participant returns to the office, informed and inspired. She quietly settles into a stiff chair at her blue-gray cubicle, the air conditioning humming in the background. She's ready to put her skills to work. But then she begins talking with colleagues. They are lost. She tries to explain. She tries to help them understand – "if we just did it this way..." A blank look stares back. And right then she realizes something: Nothing changed while she was gone – except her. Back in the training, she had imagined it differently. All one needed were skills, tools, the tricks of the trade. But in the real world, one's day-to-day workplace is complicated by its own specific set of tangled relationships, tight deadlines and penny-pinching spending caps.

The SM/M4C experience recognizes this reality. Our staff designs training to be applicable in a real-world environment. We conduct needs assessments (actually we like to consider what people want from their job, not just what they need to do it). We customize courses. We evaluate not just how people feel when a course is finished, but how they apply what they learn weeks later. Then we do more than that: We attempt to replicate the workplace environment inside the training. Training becomes more of a tutorial where participants apply newly learned skills to real-life examples in an environment that simulates their office.

Proposed Work Plan

SM/M4C recommends applying this mix of training and planning to specific programs in your organization while simultaneously introducing a much larger audience to the increasingly popular and useful methodology of social marketing.

Here are the training options:

- **Half-Day Training:** This includes some pre-workshop customization (to fit your project and participants), a 45-minute overview of social marketing for a large audience, a 2-hour workshop for a smaller group, and a brief evaluation report. The goal is to build familiarity with social marketing for the larger audience, and the outline of social marketing intervention plans for a few targeted projects.
- **One-Day Training:** This includes some pre-workshop customization (to fit your project and participants), a 90-minute presentation and demonstration for a large audience, a 3-hour workshop for a smaller group and a brief evaluation report. The goal is to build familiarity with social marketing for the larger audience, a limited set of skills for the workshop participants and the outline of social marketing intervention plans for a few targeted projects.
- **Two-Day Training:** This includes more significant pre-workshop customization (to fit your project and participants); a 90-minute presentation and demonstration for a large audience; a 3-hour workshop for a smaller group on Day 1; two additional 2- to 3-hour workshops on Day 2 that give participants working knowledge about and experience with audience research and common marketing approaches; a brief evaluation report; and some follow-up helpline assistance via email. The goal is to build some familiarity with social marketing for the larger audience, working knowledge of the social marketing approach, and a full social marketing plan that includes a marketing analysis, a logic model, marketing strategies and tactics, and a timeline.

Outcomes

The intended outcomes will be as follows:

- Building a familiarity with social marketing among your targeted program and communication staff, as well as partners outside the agency. This would include an understanding of how a marketing methodology might be used to improve results in voluntary programs.
- Providing hands-on social marketing skills to a smaller group of selected staff members and/or selected members of your partner organizations that could be immediately applied to encouraging voluntary behaviors targeted by the agency or its partners.
- Creating social marketing plans or outlines for up to three current programs, provided the key decision-makers and planners for those programs are part of the full workshop. These outlines could later be developed into operational plans for the specific programs.

Outputs

The project will begin with an assessment of the participant's wants, needs, interests and program responsibilities to customize the training as appropriate. This assessment is conducted through email and results will be shared with your project manager during a pre-workshop discussion of desired outcomes and special needs.

The initial training exercise will be a large 90-minute social marketing training, accommodating up to 500 participants, for your staff and invited guests. The goal is to build a common understanding of this increasingly popular and beneficial methodology so participants might understand how to interact effectively with groups implementing social marketing efforts both inside and outside of your organization.

Following the introductory training in the one day training would be a smaller 3-hour workshop focusing on pre-determined specific programs within your organization. Project-specific teams would be formed to participate in the training and practice of using a social marketing methodology to influence individual and organizational behavior toward the desired outcome. At least one of SM/M4C's two lead trainers, Peter Mitchell or Tait Martin, would travel to the selected site to train the participants (travel costs not included). The participants are responsible for producing any outreach materials, communicating, or otherwise implementing any social marketing ideas generated from the training.

Two-day participants will receive more in-depth training on social marketing techniques including market/audience research application, different social marketing approaches, development of logic models and marketing strategies specific to your organization and the creation of a timeline to implement the new strategies with your group. In addition, the two-day program includes an e-mail helpline for participants to use once the training is complete.

SM/M4C strongly recommends training project specific teams that include both staff and partners. Partners include individuals from community groups, government agencies or others who you rely on regularly in your business practices. By inviting outside partners, you will gain the experience of working closely with a stakeholder group in a structured way, gain expertise on community norms and other local issues, and develop a common understanding of social marketing so that the partners and your organization can move forward more efficiently.

Before and after the training, SM/M4C also conducts both a pre-test and post-test to assess the training's impact on the participants and creates a brief report for your organization. (Two-day trainings also include a longer-term follow-up made four weeks after the training is complete).

Sample Agendas

One day training:

10:30AM – Noon: Social Marketing
Intro presentation
1:00PM - 4:00PM: Workshop

Two day training:

Day One

10:30AM – Noon: Social Marketing
Intro presentation
1:00PM - 4:00PM: Workshop

Day Two

9AM – Noon: Workshop
1:30PM – 4PM: Afternoon session

Tasks

1] **Training Assessment & Customization.** Before each training, pre-training assessments are distributed to the workshop participants (those participating in both the introductory training and the follow-up workshop) to assess their specific needs, wants and program responsibilities. The results are then used to customize the training offerings.

2] **Introduction to Social Marketing.** This 90-minute training session aimed at large audiences (up to 500 people) would be offered at a predetermined location determined by your organization. The training covers the basic concepts and tactics used in social marketing. It is designed to create a baseline of understanding around social marketing and develop organizational support for initiatives using this methodology. Your managers, finance, contract specialists, scientists, public affairs specialists and administrative staff should also be invited to the session to get a better understanding of social marketing goals.

3] **Social Marketing Workshop** (for one-day offering). Following the introductory sessions (above) up to 35 selected staff and partners will participate in a more intensive workshop involving hands on exercises and using a social marketing plan for a predetermined specific program. Participants will be provided with pre-read material and social marketing toolkits. The workshop will use available market/audience research applicable to the project and provided by your organization to present additional analyses in the workshop.

4] **Audience Research Workshop** (for two-day offering only). Participants will learn how to use various types of research in the social marketing process. Issues like survey research, focus groups, market segmentation and participant observation will be discussed. Social changes theory, such as diffusion of innovation and stages of change, will also be illustrated and participants will be asked to apply those theories to specific projects.

5] **Behavioral Determinants & Marketing Strategies Workshop** (for two-day offering only). This workshop gets into "why" people do the things they do and how you can use those behaviors to achieve your organizational goal. Common marketing strategies, such as permission marketing and social norm campaigns, will also be shared.

6] **Tactical Session** (for two-day offering only). Participants will work with the SM/M4C facilitator to develop specific logic models and tactics that can be put to use in your organization. The training also includes the development of timelines to track the implementation of social marketing principles.

7] **Evaluation.** Pre-tests and post-tests are administered and analyzed to prepare a brief final report on the training for your key management and staff.

8] **Helpline e-mail assistance** (for two-day offering only). Participants will be able to contact SM/M4C staff for social marketing guidance for up to a month after the training is over for help with program implementation and general questions about their new campaign.

Staff

Peter Mitchell, Chairman & Chief Creative Officer

A former journalist and legislative staffer, Peter got into social marketing a decade ago when he was asked to direct the marketing campaign for a new anti-tobacco initiative in Florida. The campaign became “truth” – an effort that transformed tobacco control and got replicated on a national scale after Florida showed the first statewide drop in teen smoking in 19 years. Since then, Peter has developed and directed dozens of social marketing campaigns across the globe, first as a senior marketing specialist for the Academy for Educational Development, a large international non-profit, and later as a founder of Marketing for Change, which is now part of Salter>Mitchell. A graduate of Colgate University, Peter spent a decade as a reporter, including covering Florida for The Wall Street Journal, and served as the policy coordinator for Florida’s Senate President. Over the years, Peter has designed behavior-change campaigns domestically and in Bangladesh, India, Jordan and Tanzania, for the U.S. Centers for Disease Control and Prevention, the Chesapeake Bay Program, the U.S. Environmental Protection Agency, Florida Healthy Kids Corporation, the Massachusetts Institute of Technology, the Planned Parenthood Federation of America, the United Nations and the U.S. Agency for International Development.

Christene Jennings, Director of Social Marketing

Christene made her foray into social marketing in the traffic safety arena, including serving as Director of Programs at the Automotive Coalition for Traffic Safety (ACTS). After more than eight years encouraging seat belt use and improving child passenger safety, Christene led ACTS’ biggest foray into social marketing — a tween traffic safety initiative that drew national attention, including segments on NBC Nightly News and CNN. At Salter>Mitchell, she directs client solutions, diagnosing project needs and formulating the agency’s response. Christene’s expertise in social marketing methodology keeps projects sharply focused on effecting targeted, measurable behavior change.

Tait Martin, Ph.D., Vice President & Director of Research

Tait directs Salter>Mitchell’s research and keeps our behavioral-based approach focused and well grounded. His breadth of professional experience over the past 16 years ensures his methods are both rigorous and results-oriented. Tait’s main goal is to ensure that client research adheres to a behavioral-based approach consistent with the Salter>Mitchell mantra: “Awareness is not the goal; behavior change is.” His career experience includes stints as the communication director for one of the largest United Way organizations in Louisiana; spokesperson for a major state government agency in Florida; communication and public relations instructor at three top-tier higher education institutions; and morning radio talk show host. Widely cited in both academic and applied research circles, Tait holds a Ph.D. in Communication Theory and Research (emphasis in persuasion and cognitive processing) from Florida State University, as well as a master’s degree in Organizational and Interpersonal Communication from the University of Louisiana. To date, Tait has been involved with over 250 research projects across the United States.