

Developing a Social Marketing Plan

1. Provide background, purpose and focus for plan.

- a. Summarize key *background* information leading to the development of this plan.
- b. What is the campaign *purpose*, the intended impact (benefit) of a successful effort?
- c. What is the campaign *focus*?

2. Conduct a situational SWOT (strength, weakness, opportunity, threat) analysis.

Internal factors to consider: organizational resources, expertise, management support, current partnerships, distribution channels

External factors to consider: cultural, technological, demographic, natural, economic and political factors

- a. What internal *strengths* will your plan maximize?
- b. What internal *weaknesses* will your plan minimize?
- c. What external *opportunities* will your plan take advantage of?
- d. What external *threats* will your plan prepare for?
- e. What findings from *prior or similar efforts* (either yours or others') are noteworthy?

3. Select target audiences.

- a. Who is your *primary target audience*?
 - i. Consider: size, demographics, values, lifestyle, geographics, economics, related behaviors, and readiness to act.
- b. Who are your *secondary audiences*?
 - i. Consider messengers, distribution channels, and those that influence your primary audience.

4. Consider costs and economic concerns, and physical and/or monetary incentives.

- a. What *monetary costs* will you incur in executing your plan?
 - i. Consider: tangible objects, services rendered, marketing materials, and payment to community members for their planning and assistance.
 - ii. If costs *exceed* current funds, what potential funding sources can you explore?
- b. Will there be a *monetary cost* to your primary audience from tangible objects or services in your campaign? (For example, the cost of a fishing license)
- c. Will there be a *monetary or physical incentive* for your audience?
 - i. Consider: coupons, rebates, lower health costs, discounts;
 - ii. Consider: posters, magnets, food, and other tangible items.
- d. Will there be *intangible incentives* for your audience?
 - i. Consider: a sense of wellbeing, knowing they are helping the environment, a healthier lifestyle, time in nature or increased time with family.
- e. Will there be *monetary or nonmonetary* disincentives for your audience?
 - i. Consider: higher prices for non-campaign items, health concerns from toxics, worry over danger to family.

5. Promotion.

- a. What *key messages* do you want to communicate to target audiences?
- b. Who will the *messengers* be delivering and/or sponsoring the plan?
- c. What *communication channels* will you use?

- d. *Creative strategy*: Is there a logo, a tagline, a local place beloved by your audience, or other hook that you will use to coordinate and anchor your plan?
- 6. What are the barriers? Consider access and ability to participate.**
 - a. *Where* will the public perform the desired behavior? Do they have access to this area? Is transportation available?
 - b. *How* will the public perform the desired behavior? Is training, licensing, or increased knowledge needed to participate? Does the audience know how to gain the training or license?
 - c. Are there any groups or individuals in the distribution channel you will target to help support your efforts?
- 7. Develop a plan for evaluation and monitoring.**
 - a. What *purpose* will this evaluation serve?
 - b. *For whom* is the evaluation being conducted? To whom will it be presented?
 - c. What *goals* will be measured?
 - d. What *techniques and methodologies* will be used to conduct these measures?
 - e. *When* will measurements be taken?
 - f. *How* will measurements be reported?

Consider these discussion questions before you begin to formulate your plan:

- Who will be taking on actions?
- Who needs to be engaged that you have not yet reached out to?
- What actions are the highest priority for the plan?
- What changes in the community will show you that your campaign is a success?
- What specific goals or targets will get you to your priorities?
- What actions can you take immediately?
- What actions need to be considered and put into motion for the future?