APPENDIX A

SOCIAL MARKETING PLANNING WORKSHEETS

STEP 1: DESCRIBE THE SOCIAL ISSUE, ORGANIZATION(S), BACKGROUND, PURPOSE, AND FOCUS OF YOUR PLAN

1.1 Briefly identify the social issue, sometimes referred to as the “wicked problem,” your plan will be addressing (e.g., tobacco use, air pollution, water contamination, homelessness, literacy).

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1.2 Identify the organization(s) involved in developing and implementing the plan.

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1.3 Summarize key background information leading to the development of this plan, ideally using reliable statistics (e.g., percent decrease in salmon populations).

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1.4 What is the campaign purpose, the intended impact (e.g., reduced teen pregnancies, increased protection of salmon habitats)?

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1.5 What is the campaign focus, the approach you will be using to contribute to your plan’s purpose (e.g., residential gardening practices)? Areas of focus may be solution-oriented (e.g., soft shore buffers), population-based (e.g., homes on streams), or product-related strategies (e.g., native plants).

Refer to Chapter 4 for a detailed description of the process.
STEP 2: CONDUCT A SITUATION ANALYSIS

(Identify Two to Three Bullet Points for Each)

Organizational Factors: Organizational Resources, Service Delivery Capabilities, Expertise, Management Support, Issue Priority, Internal Publics, Current Alliances and Partnerships, Past Performance

2.1 What organizational strengths will your plan maximize?

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2.2 What organizational weaknesses will your plan minimize?

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External Forces: Cultural, Technological, Demographic, Natural, Economic, Political/Legal, External Publics

2.3 What environmental opportunities will your plan take advantage of?

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2.4 What environmental threats will your plan prepare for?

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Prior and Similar Efforts

2.5 What findings from prior and similar efforts are noteworthy, those of yours and others?

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Refer to Chapter 4 for a detailed description of the process.
STEP 3: SELECT TARGET AUDIENCES

3.1 Describe the primary target audiences for your program/campaign in terms of size, problem incidence and severity, and relevant variables, including demographics, psychographics/values and lifestyles, geographics, related behaviors, and/or readiness to act (e.g., homeowners on shoreline properties engaged in landscaping and interested in protecting the environment):

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3.2 If you have additional important audiences that you will need to influence as well, describe them here, to keep them in mind as you develop strategies. They may end up being messengers or distribution channels (e.g., garden centers and nurseries):

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Refer to Chapter 5 for a detailed description of the process and Worksheet A on page 518 in this Appendix.
STEP 4: SET BEHAVIOR OBJECTIVES AND TARGET GOALS

Objectives

4.1 Behavior Objective:
What, very specifically, do you want to influence your target audience to do as a result of this campaign or project (e.g., plant native plants)?
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4.2 Knowledge Objective:
Is there anything you need them to know in order to act (e.g., how to identify native plants at the nursery)?
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4.3 Belief Objective:
Is there anything you need them to believe in order to act (e.g., native plants can be beautiful and easier to maintain)?
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Goals

4.4 What quantifiable, measurable goals are you targeting? Ideally, these are stated in terms of behavior change (e.g., increase in sales of native plants). Other potential target goals are campaign awareness, recall, and/or response and changes in knowledge, belief, or behavior intent levels.
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Refer to Chapter 6 for a detailed description of the process and Worksheet B on page 519 in this Appendix.
STEP 5: IDENTIFY TARGET AUDIENCE BARRIERS, BENEFITS, AND MOTIVATORS; THE COMPETITION; AND INFLUENTIAL OTHERS

Barriers
5.1 Make a list of *barriers* your audience may have to adopting the desired behavior. These may be related to something, physical, psychological, economical, skills, knowledge, awareness, or attitudes. (Try for a list of 5 to 10.)

Benefits
5.2 What are the key *benefits* your target audience wants in exchange for performing the behavior (e.g., a yard that’s easier to maintain and increased wildlife on their property)? This answers the question “What’s in it for me?” (Try for a list of 2 to 3.)

Motivators
5.3 What does your target audience say will make it more likely that they would do the behavior? Ask them if there is something you can give them, say to them, or show them that would help them (e.g., an easy way to know which nurseries sell native plants and to identify plants at the nursery).

Competition
5.4 What are the major competing *alternative behaviors* (e.g., planting nonnative plants)?
5.5 What *benefits* do your audiences associate with these behaviors (e.g., easier to find)?
5.6 What *costs* do your audiences associate with these behaviors (e.g., requires more fertilizing)?

Influential Others
5.7 Relative to the desired behavior, who does your target audience listen to, watch, and/or look up to?
5.8 What do you know about what these midstream audiences are currently saying and doing regarding the desired behavior (e.g., staff at nurseries)?

Refer to Chapter 7 for a detailed description of the process and Worksheet C on page 520 of this Appendix.
Positioning Statement

6.1 Write a statement similar to the following, filling in the blanks:

“We want [TARGET AUDIENCE] to see [DESIRED BEHAVIOR] as [ADJECTIVES, DESCRIPTIVE PHRASES, SET OF BENEFITS, OR HOW THIS BEHAVIOR IS BETTER THAN THE COMPETITION] (e.g., “We want shoreline property owners engaged in landscaping to see native plants as beautiful, easy to find, less hassle to maintain, and a way to protect water quality and wildlife habitats”).

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Refer to Chapter 9 for a detailed description of the process.
**STEP 7: DEVELOP MARKETING STRATEGIES**

**7.1 Product: Creating the Product Platform**

7.1.1 Core Product: What is the major perceived benefit your target audience wants from performing the behavior that you will highlight? (Choose one or a few from those identified in 5.2.)

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7.1.2 Actual Product: What, if any, tangible goods and services will you be offering and/or promoting (e.g., 100 native plants to choose from, fruits and vegetables, life vests, blood monitoring equipment, low-flow showerheads)?

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______________________________________________________________________

7.1.3 Augmented Product: Are there any additional tangible goods or services that would assist your target audience in performing the behavior (e.g., workshop on designing a native plant garden)?

Refer to Chapter 10 for a detailed description of the process.

**7.2 Price: Fees and Monetary and Nonmonetary Incentives and Disincentives**

7.2.1 If you will be including tangible goods and services in your campaign, what, if anything, will the target audience have to pay for them (e.g., cost of native plants, life vests)?

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7.2.2 Describe any monetary incentives for your target audience (e.g., coupons, rebates).

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7.2.3 Describe any monetary disincentives you will highlight (e.g., fines, increased taxes, higher prices for competing products).

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7.2.4 Describe any nonmonetary incentives (e.g., recognition, such as yard plaques).

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7.2.5 Describe any nonmonetary disincentives (e.g., negative visibility, a website with photos of properties where migratory birds have disappeared).

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Refer to Chapter 11 for a detailed description of the process.

7.3 Place: Develop the Place Strategy

As you determine each of the following, look for ways to make locations closer and more appealing, to extend hours, and to be there at the point of decision making.

7.3.1 Where will you encourage and support your target audience to perform the desired behavior and when?

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7.3.2 Where and when will the target audience acquire any related tangible goods?

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7.3.3 Where and when will the target audience acquire any associated services?
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7.3.4 Are there any groups or individuals in the distribution channel that you will target to support efforts (e.g., nursery owners and their staff)?
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Refer to Chapter 12 for a detailed description of the process.

7.4 Promotion: Decide on Messages, Messengers, Creative Strategies, and Communication Channels

7.4.1 Messages: What key messages do you want your campaign to communicate to target audiences?
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7.4.2 Messengers: Who will deliver the messages and/or be the perceived sponsor?
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7.4.3 Creative Strategies: Summarize, describe, or highlight elements such as logos, taglines, copy, visuals, colors, script, actors, scenes, and sounds in broadcast media.
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7.4.4 Communication Channels: Where will your messages appear?

Refer to Chapters 13 and 14 for a detailed description of the process.
STEP 8: DEVELOP A PLAN FOR MONITORING AND EVALUATION

8.1 What is the *purpose* of this evaluation? Why are you doing it?

___________________________________________________________________

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8.2 For *whom* is the evaluation being conducted? To whom will you present it?

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8.3 *What inputs, outputs, outcomes, and impact* will be measured?

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8.4 *What techniques and methodologies* will be used to conduct each of these measurements?

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8.5 *When* will these measurements be taken?

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8.6 *How much* will this cost?

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Refer to Chapter 15 for a detailed description of the process and Worksheet D on page 521 in this Appendix.
STEP 9: ESTABLISH BUDGETS AND FIND FUNDING SOURCES

9.1 What costs will be associated with product-related strategies?

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9.2 What costs will be associated with price-related strategies?

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9.3 What costs will be associated with place-related strategies?

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9.4 What costs will be associated with promotion-related strategies?

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9.5 What costs will be associated with evaluation-related strategies?

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9.6 If costs exceed currently available funds, what potential additional funding sources can be explored?

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Refer to Chapter 16 for a detailed description of the process.
STEP 10: COMPLETE AN IMPLEMENTATION PLAN

10.1 Sample Implementation Plan

<table>
<thead>
<tr>
<th>What</th>
<th>Who</th>
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10.2 If you are conducting a pilot or plan with several phases, complete a grid for each phase.

Refer to Chapter 17 for a detailed description of the process. For an electronic version of this plan, visit www.socialmarketingservice.com.
Worksheet A
Selecting Target Audiences

<table>
<thead>
<tr>
<th>1 Potential Target Audiences</th>
<th>2 Size</th>
<th>3 Problem Incidence</th>
<th>4 Readiness to Act</th>
<th>5 Ability to Reach</th>
<th>6 Match for the Organization</th>
<th>7 Average Score (From 2, 3, 4, 5)</th>
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1. **POTENTIAL TARGET AUDIENCES**: Relative to a campaign purpose (e.g., improve water quality) and focus (e.g., yard care), brainstorm and then list potential target audiences. A target audience is a segment of a population that has similar characteristics. Potential audiences may be grouped based on one or more variables, including demographics, geographics, values and lifestyles, or current related behaviors (e.g., homeowners with large lawns).

2. **SIZE**: As a segment of a population, what is the actual or relative size of this segment?

3. **PROBLEM INCIDENCE**: How significant is the contribution that this audience makes to the environmental problem (e.g., shoreline properties or frequency of fertilizing)?

4. **READINESS TO ACT**: How concerned is the target audience with the problem issue/behavior?

5. **ABILITY TO REACH**: Can you identify them and do you have efficient ways to reach them?

6. **MATCH FOR THE ORGANIZATION**: Does this audience support your organizational mission, expertise, and positioning?

7. **AVERAGE SCORE**: This can be a “weighted average” to give increased significance to one or more of the items, or it can be an “unweighted average,” with each aspect being considered equally important.

A variety of scales have been used to rank these items: (a) high, medium, low; (b) scale of 1 to 10, (c) scale of 1 to 7, (d) scale of 1 to 5. The one used will depend on how much verifiable information is available.
## Worksheet B

### Prioritizing Behaviors

<table>
<thead>
<tr>
<th>1 Potential Behaviors to Rank</th>
<th>2 Impact on the Social Issue</th>
<th>3 Willingness of Target Audience to do this Behavior</th>
<th>4 Measurability</th>
<th>5 Market Opportunity</th>
<th>6 Market Supply</th>
<th>5 Average Score (From 2, 3, 4, 5, 6)</th>
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1. **Potential Behaviors to Rank:** Relative to a campaign purpose, focus, and target audience, brainstorm and then list potential single, simple behaviors to promote (e.g., replacing half of lawn with native plants).

2. **Impact on the Environmental Issue:** What potential impact do scientists, technical staff, and/or engineers determine that this desired behavior will have on the environment relative to other behaviors (e.g., using natural vs. chemical fertilizers vs. reducing lawn in half)?

3. **Willingness:** How willing is the target audience to do this? In the diffusion model, this would be the percentage or number who are in the Help Me group versus the Show Me or Make Me group.

4. **Measurability:** Can the behavior be measured through either observation, record keeping, or self-reporting?

5. **Market Opportunity:** Estimate the percentage and/or number of people in the target audience/population who are not already doing the behavior. (Note: The higher the number, the higher the score.)

6. **Market Supply:** Does the behavior need more support? If some other organization or organizations are already addressing this behavior, perhaps a different behavior would be more beneficial to the social issue.

7. **Average Score:** This can be a “weighted average,” to give increased significance to one or more of the items, or it can be an “unweighted average,” with each aspect being considered equally important.

A variety of scales have been used to rank these items: (a) high, medium, low; (b) scale of 1 to 10, (c) scale of 1 to 7, (d) scale of 1 to 5. The one used will depend on how much verifiable information is available.

(Adapted from Doug McKenzie-Mohr, www.cbsm.com.)
Worksheet C  
*Using the 4Ps to Reduce Barriers and Increase Benefits*

**Desired Behavior:** _______________________________________________________________

**Target Audience:** _______________________________________________________________

For each of the target audience's perceived barriers and potential benefits, consider whether one or more of the 4Ps would help reduce the barrier and provide desired benefits.

<table>
<thead>
<tr>
<th>Perceived Barriers to Desired Behaviors</th>
<th>Product \nGoods or services to promote or to provide to help the audience do the behavior</th>
<th>Price \nIncentives and disincentives (includes use of pledges and commitments)</th>
<th>Place \nWhere goods and services can be accessed or behavior will be performed</th>
<th>Promotion \nMessages, messengers, creative elements, and communication channels (includes use of prompts)</th>
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**Desired Benefits**


## Worksheet D

### Potential Evaluation Measures

<table>
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<th>Inputs</th>
<th>Outputs</th>
<th>Outcomes</th>
<th>Impact</th>
<th>Return on Investment</th>
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</table>
| Resources allocated to the campaign or program effort:  
- Dollars  
- Incremental staff time  
- Existing materials  
- Existing distribution channels  
- Existing partners | Program activities conducted to promote a desired behavior. These measures do not indicate whether the audience “noticed” or responded to these activities. They represent only what was “put out there,” including:  
- Number of materials disseminated  
- Number of calls made  
- Numbers and types of distribution channels for any products or services  
- Number of events held  
- Websites created/utilized  
- Social media tactics  
- Reach and frequency of communications  
- Free media coverage  
- Paid media impressions  
- Implementation of program elements (e.g., whether on time, on budget) | Audience responses to outputs, including:  
- Changes in behavior  
- Changes in numbers of related products or services “sold” (e.g., native plants)  
- Changes in behavior intent  
- Changes in knowledge  
- Changes in beliefs  
- Responses to campaign elements (e.g., hits on a website)  
- Campaign awareness  
- Customer satisfaction levels  
- Policy changes  
- Partnerships and contributions created | Indicators that show levels of impact on the social issue that constituted the focus of the effort:  
- Lives saved  
- Diseases prevented  
- Injuries avoided  
- Water quality improved  
- Water supply increased  
- Air quality improved  
- Landfill reduced  
- Wildlife and habitats protected  
- Animal cruelty reduced  
- Crimes prevented  
- Financial well-being improved | Economic value of changes in behavior and calculated rate of return on the spending associated with the effort:  
- For every dollar spent, dollars saved or generated  
- After subtracting expenses, rate of return on investment |