



SOCIAL MARKETING PLANNING PROCESS: CREATING YOUR SOCIAL MARKETING PLAN

SAMHSA
Substance Abuse and Mental Health
Services Administration

S O C I A L M A R K E T I N G T A T E A M

One of your system of care RFA requirements is to develop a social marketing plan that will serve as your road map to communications and outreach. A comprehensive plan will help you reach your program goals and support your expansion and sustainability.

Social marketing is an approach that uses commercial marketing strategies to drive behavior change around a social issue. Developing a social marketing plan can help you be more strategic and audience-focused in your communication efforts and achieve better results. (Please note that social media is not the same as social marketing and they are often confused. Social media—such as Facebook and Twitter—is a tool/activity that can be used toward achieving some of the goals you create within your social marketing plan.)

This document is provided as a tool to help you build a comprehensive plan. It is not intended to serve as a “fill-in” document that can be submitted to meet your requirement. You will use this guide to help you think about the sections that should be included in your plan, then decide what document format (i.e., narrative, graphic flow chart, etc.) works best for your system of care.

Before you start to write your plan, we recommend that you:

- Form a social marketing committee. A tip sheet is available from your social marketing TA Provider if help is needed regarding committee composition. One of this committee’s tasks will be the creation of a social marketing plan. The process should not be a one-person job.
- Make sure that everyone is aware that the plan is due at the end of your first-year funding agreement and that the scope of the document should focus on year 2 with projections through year 4. A social marketing plan also functions best when your committee participates in periodic review and revision of the plan throughout years 2–4.

Once you have completed your plan at the end of year 1, we recommend that you:

- ☐ Review your completed plan to make sure that you have included each section explained in this guide.
- ☐ Ask your social marketing TA Provider to review and provide feedback.
- ☐ Obtain final approval from your system of care governance board.
- ☐ Submit your plan to your assigned Government Project Officer.

Figure 1: Visualizing the Social Marketing Process



Figure 1 depicts the social marketing planning process. Each of the individual parts builds on the others. Understanding the starting point and including each individual component shown above will make your system of care social marketing plan more effective.

Each section of the above diagram is explained in depth in the next few pages of this guide.

Section 1: System of Care History/Background

When you begin your social marketing plan, it is important to review the history of your system of care. Whether you are a brand new or experienced system of care grant, a brief explanation will provide context for your plan.

Summary of key points to be included in your background section:



Section 2: System of Care Goals

Your social marketing goals should directly support your overall system of care program goals. Include these program goals in your social marketing plan so that there is a clear connection between your social marketing efforts and how they will help to achieve your system of care goals.

Our system of care goals are:



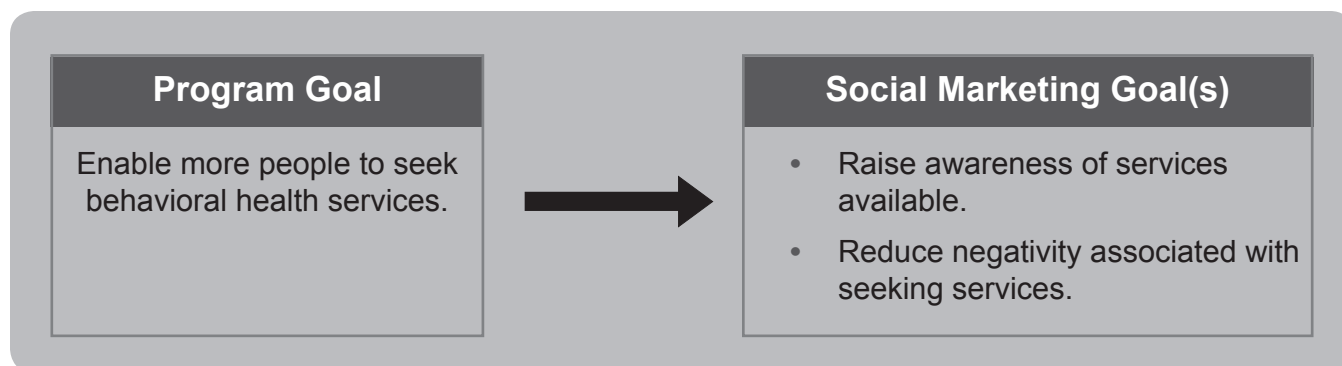
Section 3: Social Marketing Goals

Goals can focus on foundational activities such as sustainability and partnership growth, or programmatic activities, such as increasing access to services and participation in the system of care. Each social marketing goal(s) should support an overall program goal, like one of those listed in Section 2 above, as well as identify a change in either knowledge, attitudes, beliefs, or behavior. For system of care communities, one priority goal is developing tangible support for expanding and sustaining the program. No matter the goal(s), it's important to obtain buy-in on them early so everyone involved in the planning process is aligned. Here are some questions that may help to focus your goal writing efforts:

- What issue is most important to your program right now?
- Who is most affected by this issue?
- Who makes decisions about, or influences this issue?
- What measurable outcomes would you like to achieve through your communications efforts?
- How will you know you are achieving your goals?

Your social marketing plan goals should state desired outcomes for your communication efforts. This plan should be a “living” document and should grow with your system of care. You may need to start setting goals for the short-term or combine short-term and long-term goals that serve your program goals.

Example of a social marketing goal that supports a program goal:



A well-written social marketing goal should be accompanied by measurable objectives. Including a measurable objective around changes in attitudes will help you evaluate whether your social marketing strategies have been successful. Consider using the practice of S.M.A.R.T. goals—making sure your goals are Specific, Measurable, Attainable, Realistic, and Timely.

Section 4: Audiences

Systems of care engage multiple groups for the benefit of children, youth, and families, but reaching all of these groups—particularly within a one-year period—is not practical or realistic. Think about the one or two key audiences that you need to get on board first to obtain the support necessary to facilitate state, tribal, or region-wide implementation.

Whose knowledge, attitudes, beliefs, and behaviors should be impacted to meet your identified goal(s)?

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Once you have identified no more than three audiences for your goal, it's important to analyze your audience. One of the key principles of social marketing is that it uses language and tools that will reach each designated audience. If you try to reach an audience but do not take the time to understand them, your social marketing will be less effective.

When considering the change in attitudes, beliefs, and behaviors you are asking your audience to undertake, it is important to think about the following:

- What are some characteristics of this audience (i.e., gender, ethnicity, income level, education)?
- What are the language considerations?
- By what or whom is the audience influenced?
- What do you know about this audience's knowledge, attitudes, beliefs, and behaviors in relation to your goal?
- What barriers might the audience experience in changing attitudes, beliefs, or behaviors?
- What benefits might the audience derive from changing attitudes, beliefs, or behaviors?

(Additional note: Once your audience(s) have been identified, your social marketing committee should consider adding members from this audience to the committee if they are not already a part of the group.)

Section 5: Messages

Your messages deliver important information about the issue and compel the targeted audience to think, feel, or act in a way that helps your system of care achieve its goals. They should:

- Show the importance, urgency, or magnitude of the issue;
- Be specific to the audience, not general messages;
- Address the barriers and highlight the benefits to the audience (per your audience analysis);
- Put a “face” on the issue;
- Be tied to specific values, beliefs, or interests of the audience;
- Reflect an understanding of what would motivate the audience to think, feel, or act;
- Be supported by facts; and
- Be culturally competent.

You should ensure that your messages are effective by soliciting input from members of your audience to determine language that will resonate with them. You will learn more about this in the section on pretesting.

As you write your messages, be sure to identify which message is designed to reach each audience. Supporting information should show key facts that bolster your message.

Audience:	
Message:	
Supporting Information:	

Audience:	
Message:	
Supporting Information:	

Audience:	
Message:	
Supporting Information:	

Section 6: Channels

What are the best ways to reach the audiences you have identified? For families and youth, those ways, or “channels,” may include other partners, important community members, and media—both traditional and digital. For professionals, channels may include internal newsletters, meetings, or trainings.

Audience:	
Channel(s):	

Audience:	
Channel(s):	

Audience:	
Channel(s):	

Section 7: Proposed Activities, Events, and Materials

Social marketing is typically understood as activities, events, and materials. They are, of course, an important part of the process—but not the only one. When they are bolstered by the foundational work that comes before them (identifying a goal, audience, and message), they will be more effective.

What types of activities, events, and materials will you use to engage your audiences? Creating or participating in a National Children’s Mental Health Awareness Day event/activity is an example of content that should be included in this section. There also are many other different content items that can be included: newsletters, brochures, social media campaigns, PSAs, print media campaigns, open houses, hotlines, speeches, listservs, radio broadcasts, podcasts, videos, and more. As you propose your activities, events, and materials, consider:

- Appropriateness to audience, goal, and message;
- Relevance to desired outcomes;
- Climate of community toward the issue/activity;
- Cultural competence (including language); and
- Budget allowed and any in-kind contributions from partners.

It may be useful to chart your proposed activities, events, and materials in a table format (see example below) that may include descriptions, task leads, timeline, budget, reference to the specific goal it supports, channels, and applicable audience. (In the appendix of this document there is a *Social Marketing Planning Summary* chart that may also be used.)

Audience:	
Proposed Activities:	
Channels:	
Materials Needed:	
Estimated Budget:	
Timeline:	
Completion Timeframe & Task Lead:	

Section 7: Proposed Activities, Events, and Materials, *continued*

Audience:	
Proposed Activities:	
Channels:	
Materials Needed:	
Estimated Budget:	
Timeline:	
Completion Timeframe & Task Lead:	

Audience:	
Proposed Activities:	
Channels:	
Materials Needed:	
Estimated Budget:	
Timeline:	
Completion Timeframe & Task Lead:	

Section 8: Pretesting and Implementation

Pretesting means that you will check with your intended audience before you finalize activities, events, or materials. This process can include surveys, discussion groups, interviews, or informal feedback. In addition, consult with the people who manage the channels you intend to use—tribal elders, community leaders, and communications professionals in key stakeholder organizations. This will ensure the intended message within the specific product is both effective and conveyed in a culturally competent way. While pretesting takes time, it ensures your products are as effective as possible and can save you the cost of producing materials that are not audience appropriate.

Pretesting Ideas:

Section 9: Evaluation and Mid-Course Corrections

In writing your social marketing goals, they should have included a measurable change in knowledge, attitudes, beliefs, or behaviors that will help you determine whether your social marketing efforts have been effective. Ongoing evaluation and mid-course corrections allow you to identify milestones; determine strengths and weaknesses; identify obstacles; create and implement new approaches to success; and consult with social marketing and communications technical assistance providers.

If you are not reaching social marketing goals as determined by your evaluation process, it is necessary to make some revisions to your planning. Working with the system of care evaluator will help focus your efforts.

Here are some examples of how social marketing efforts may be evaluated:

- Increased call volume to warm line.
- Asking “How did you hear about us?” (Determine where they got the information—which channel?)
- Process measures—knowing the distribution number of materials and numbers reached at events.
- Outcome measures—is there awareness of service?
- Wrapping social marketing evaluation into other QI evaluation efforts for the system of care.

What will be the process by which you evaluate the effectiveness of your social marketing efforts?



Included at the end of this document is a template tool that you can use to do pre-planning work in developing the entire plan. The template will help you focus in on the key points of your plan that will then be explained in your final social marketing plan.

In summary, reaching your social marketing goal(s) begins with a clear understanding of why your system of care exists (history) and what program goals have been identified. Writing a social marketing goal(s) that supports your system of care program goal(s) will help support your work toward sustainability. Social marketing goals can be achieved by identifying a specific audience, creating tailored messages to reach

that audience, and identifying the best channels to get that message to your audience. Careful thought will go into what activities, events, or materials are the best product to go through those channels and which will work best for your audience. Before you create and finalize those products, pretesting products with representatives from your chosen audience will help determine their appropriateness. Finally, you will evaluate the effectiveness of your strategies to determine if they are effective in achieving your stated goal.

Social marketing TA Provider contact information:



System of Care Background Information:



System of Care Program Goal(s):



Social Marketing Goal(s):

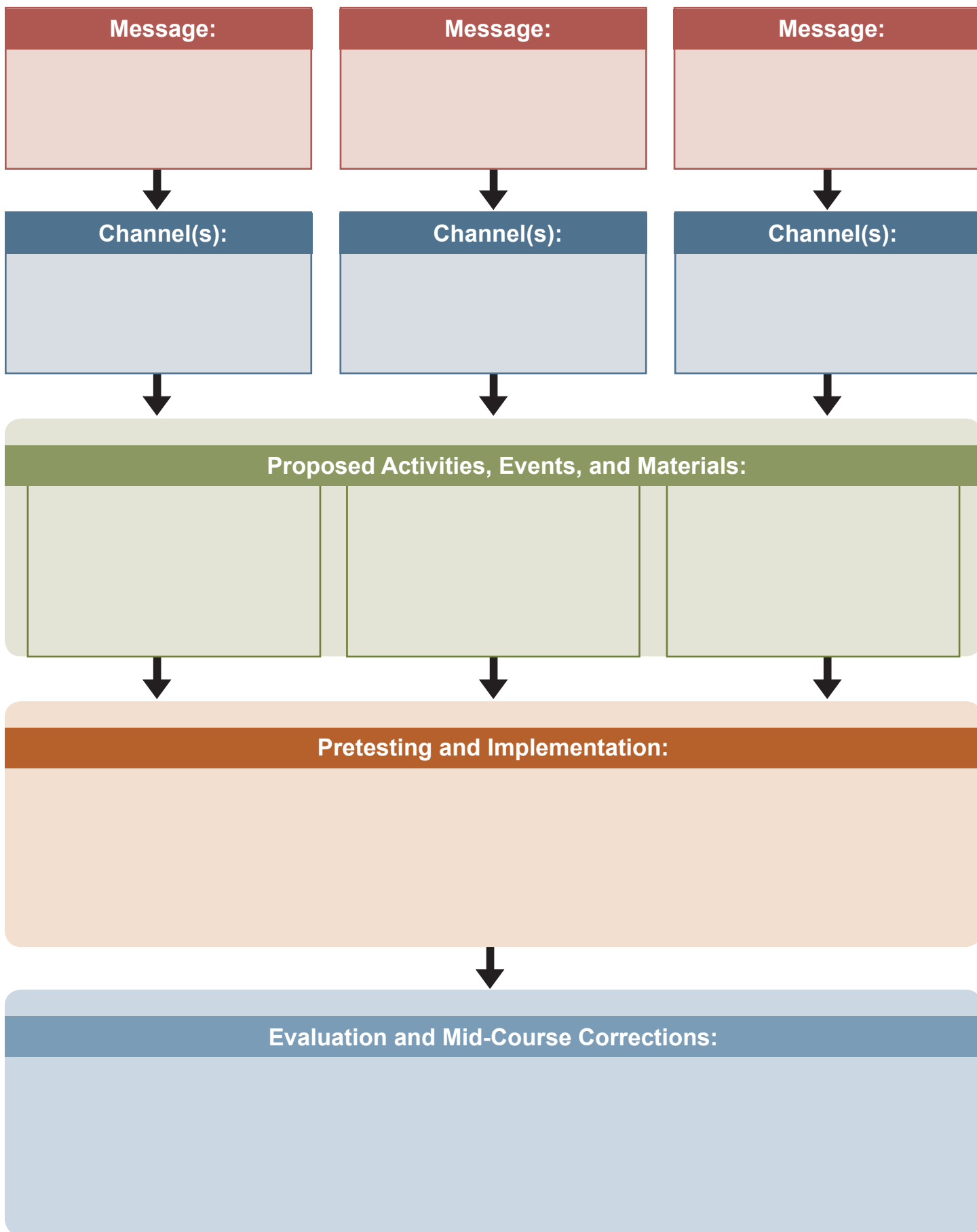


Audience:

Audience:

Audience:





Social Marketing Planning Summary

Who is your audience?	
What do you want the audience to do?	
What are the messages?	
Which channels will you use?	
How will each channel be used?	
Who will do this?	
What activities, events, or materials will support this?	
How much money is available to do this?	
What are the start and end dates?	

