

## CFASMA1.1V3.0

# Plan, manage and evaluate social marketing research programmes



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### Overview

This unit is about planning, managing and evaluating research programmes to develop understanding and insight into the lifestyles, behaviours, attitudes and beliefs of target groups in order to identify what might motivate the behaviours you seek, what might prevent action and what interventions might achieve and sustain change.

It involves planning, coordinating and evaluating a range of research activities, but not necessarily carrying them out yourself (you may commission external organisations or have in-house researchers who carry out the research).

This unit is for people in managerial roles who plan, manage and evaluate research programmes which inform social marketing strategies and programmes.

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### Performance criteria

- You must be able to:*
- P1 ensure effective engagement with the target group(s) and other key stakeholders in all phases of the research programme, taking care to engage vulnerable and hard-to-reach groups
  - P2 establish and agree with key stakeholders:
    - P2.1 the purpose of the research programme
    - P2.2 the scope of the research programme
    - P2.3 key questions to be answered by the research
    - P2.4 the timeframe for the research
    - P2.5 the resources available
    - P2.6 risks involved in the research and how these risks are to be managed
    - P2.7 criteria to evaluate the quality and usefulness of the research
    - P2.8 the format(s) in which research results will be delivered
  - P3 identify existing evidence of motivators and inhibitors of relevant behaviours and the effectiveness of interventions and evaluate the salience of this evidence
  - P4 identify relevant psycho-social theories associated with the creation and maintenance of behaviour
  - P5 establish and prioritise the gaps or deficiencies in existing evidence of motivators and inhibitors of relevant behaviours and related behavioural theories that need to be filled or remedied by the research programme
  - P6 identify, appraise and select established or innovative research method(s) capable of providing reliable evidence cost-effectively
  - P7 identify, justify and obtain the resources required for the research programme
  - P8 identify any critical or sensitive issues which may arise and develop plans to deal with contingencies or problems
  - P9 identify and resolve with key stakeholders any ethical issues arising from the research programme
  - P10 provide researchers with sufficient briefing to ensure they understand:
    - P10.1 the purpose and scope of the research programme
    - P10.2 their own and their colleagues' expected contributions and responsibilities
    - P10.3 the research method(s) to be used
    - P10.4 the guidance and support available to them and how to access these
    - P10.5 how to respond in case of contingencies or problems
    - P10.6 how and when they should report progress and findings
  - P11 monitor the progress of the research programme, providing any required guidance or support to researchers and paying particular attention to any critical or sensitive issues
  - P12 provide specific feedback to researchers designed to help them deliver

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- high quality results efficiently
- P13 adapt the research programme and methods used in response to problems or opportunities arising
- P14 report the results of the research to key stakeholders in agreed format(s), together with a clearly-argued explanation and interpretation
- P15 evaluate the quality and usefulness of the research with key stakeholders, using agreed criteria

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### Knowledge and understanding

*You need to know and understand:*

#### **General Knowledge and Understanding**

- K1 analytical principles, methods, tools and techniques
- K2 briefing and debriefing principles, methods, tools and techniques
- K3 communication principles, methods, tools and techniques
- K4 evaluation principles, methods, tools and techniques
- K5 feedback principles, methods, tools and techniques
- K6 information management principles, methods, tools and techniques
- K7 marketing research principles, methods, tools and techniques
- K8 monitoring principles, methods, tools and techniques
- K9 objective setting principles, methods, tools and techniques
- K10 planning principles, methods, tools and techniques
- K11 principles, methods, tools and techniques for addressing ethical issues
- K12 principles, methods, tools and techniques for engaging effectively with target groups and stakeholders, including vulnerable and hard-to-reach groups
- K13 project management principles, methods, tools and techniques
- K14 sampling principles, methods, tools and techniques
- K15 social marketing principles, methods, tools and techniques
- K16 validation and verification principles, methods, tools and techniques

#### **Industry/Sector Specific Knowledge & Understanding**

- K17 current and emerging trends and developments in the sector internationally, nationally and locally
- K18 industry/sector, organisational/partnership and professional codes of practice
- K19 legal, regulatory and ethical requirements in the industry/sector

#### **Context Specific Knowledge & Understanding**

- K20 codes of practice relevant to your role
- K21 sources of data, information and knowledge
- K22 specific requirements of sponsors/funders
- K23 target groups, their diverse interests, needs, abilities and preferences

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### Additional Information

#### Behaviours

1. present information clearly, concisely, accurately and in ways that promote understanding
2. comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes
3. identify and raise ethical concerns
4. set demanding but achievable objectives for self and others
5. establish and agree with key stakeholders measurable objectives
6. ensure that others understand and agree what is expected of them and hold them to account
7. monitor quality of work and progress against plans
8. identify sources of information to meet current and foreseeable requirements
9. use cost-effective and time-effective means to gather, store and retrieve information
10. identify and work with people and organisations who can provide support for own work
11. ensure effective engagement with target groups, policy makers and other key stakeholders
12. encourage others to contribute ideas and to reach a consensus

#### Glossary

##### **Social Marketing Programme**

As used in the standards, "social marketing programme" encompasses longer-term (>3 years) programmes, medium-term (1-3 years) campaigns and short-term (<1 year) targeted initiatives.

##### **Stakeholders**

Includes all those involved in, or affected by, the social marketing strategy and the issues it is seeking to address. Key stakeholders are those with the greatest interest in or influence on the issues; they will always include the target groups or intended beneficiaries of the social marketing activity

##### **Purpose**

Is the reason why the research programme is being carried out. The purpose can be discovered by asking the question: what are the decisions the research is designed to inform?

##### **Scope**

Includes both target group(s) and the behaviours to be addressed.

##### **Resources**

Includes: physical (premises, equipment, consumables, energy); financial; human (whether paid or unpaid, internal or external); information

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#### **Risk**

Means the chances of an event happening and the seriousness of the consequences of that event. "Risk" does not of itself have a negative connotation; there can be both positive and negative consequences of an event. One of the key risks in carrying out a test marketing activity is that the results become contaminated by changes in other environmental factors

#### **Risk management**

Includes: assessing the risks; taking action to avoid events that have negative consequences; planning to minimise the negative consequences and maximise the opportunities if events do occur

#### **Saliency**

Means the relevance and importance of the evidence to the particular issue(s) to be addressed by the research programme

#### **Contingency**

This is something that is not scheduled to happen, but which might happen and, therefore, needs to be prepared for

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<b>Relevant occupations</b>	Arts, Media and Publishing; Health, Public Services and Care; Health and Social Care; Public Services; Animal care and veterinary science; Environmental conservation; Retailing and wholesaling; Performing Arts; History, philosophy and theology; Social sciences; Sociology and social policy; Education and training; Accounting and finance; Business management; Marketing and sales; Health and Social Services Officers; Health Professionals; Teaching Professionals; Health Associate Professionals; Protective Service Occupations; Government and Related Organisations; Finance; Communications; General; Personal Service Occupations; Sales and Customer Services Occupations; Business and Finance Associate Professionals
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<b>Suite</b>	Social Marketing
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<b>Key words</b>	social marketing, social marketing research, planning, managing, evaluation, CSR, corporate, social responsibility, research
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