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### Overview

This unit is about establishing social marketing strategies and action plans to meet the organisation's or partnership's social marketing goals. This is a cyclical activity, with many iterative loops, so the performance standards are not necessarily in chronological order (for example, it may be necessary to review and evaluate existing strategies, before creating new ones).

This unit is for people in strategic roles who take the lead on behalf of an organisation or partnership for defining and gaining agreement on social marketing goals and the strategy for achieving them.

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### Performance criteria

*You must be able to:*

- P1 identify, prioritise and analyse the strategic issues, policy objectives and behavioural challenges to be addressed by the organisation's or partnership's social marketing strategy
- P2 identify and prioritise stakeholders and their interests relating to the issues and behavioural challenges
- P3 ensure effective engagement with the target groups and other key stakeholders affected by the issues and behavioural challenges
- P4 develop and agree with key stakeholders clearly defined social marketing goals
- P5 review factors in the internal and external environments which may impact on, or compete with, social marketing goals
- P6 review and interpret any legal, organisational and professional constraints which may guide, modify or limit the formulation of social marketing goals
- P7 evaluate the evidence from social marketing research relevant to the target groups and the potential impact of contemporaneous programmes, interventions or other relevant activities
- P8 consider and resolve with key stakeholders ethical considerations relating to social marketing goals
- P9 agree with key stakeholders the core values underpinning the social marketing strategy and how these core values are to be expressed through a coherent brand
- P10 create an evidence-based strategy and action plan to meet social marketing goals which:
  - P10.1 is capable of addressing the issues and behavioural challenges in the defined strategic timeframe
  - P10.2 clearly identifies and describes the primary and secondary target audiences
  - P10.3 takes account of factors in the internal and external environments
  - P10.4 takes account of ethical considerations
  - P10.5 is consistent with agreed core values
  - P10.6 includes SMART objectives
  - P10.7 provides sufficient level of detail to allow those involved to carry out their responsibilities effectively
  - P10.8 minimises any adverse impacts
  - P10.9 takes account of both short and longer term effects
  - P10.10 includes a robust monitoring and evaluation framework
- P11 gain support from key stakeholders for the organisation's or partnership's social marketing strategy and action plan
- P12 identify and obtain the resources required for the social marketing strategy and action plan

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- P13 allocate responsibilities and resources, coordinating and monitoring activities in order to implement the strategy
- P14 pilot and review the organisation's or partnership's social marketing strategy and action plan, adapting it as appropriate

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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 communication principles, methods, tools and techniques
- K3 consultation principles, methods, tools and techniques
- K4 creative-thinking principles, methods, tools and techniques
- K5 decision-making principles, methods, tools and techniques
- K6 examples of effective and ineffective social marketing practice relevant to the activity
- K7 influencing principles, methods, tools and techniques
- K8 leadership principles, methods, styles and techniques
- K9 motivation principles, methods, tools and techniques
- K10 objective setting principles, methods, tools and techniques
- K11 partnership working principles, methods, tools and techniques
- K12 planning principles, methods, tools and techniques
- K13 principles, methods, tools and techniques for addressing ethical issues
- K14 principles, methods, tools and techniques for developing evidence-based proposals
- K15 principles, methods, tools and techniques for engaging effectively with target groups and stakeholders, including vulnerable and hard-to-reach groups
- K16 research findings relevant to the activity
- K17 resource management principles, methods, tools and techniques
- K18 risk management principles, methods, tools and techniques
- K19 social marketing principles, methods, tools and techniques

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

- K20 current and emerging trends and developments in the sector internationally, nationally and locally
- K21 industry/sector, organisational/partnership and professional codes of practice
- K22 legal, regulatory and ethical requirements in the industry/sector

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

- K23 competitors and competitor management strategies
- K24 key political, economic, social, technological and legal factors relevant to the context
- K25 organisational/partnership culture, values and ethos
- K26 organisational/partnership resources
- K27 organisational/partnership vision, mission and strategic objectives
- K28 sources of funding for organisational/partnership activities
- K29 specific requirements of sponsors/funders

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K30 stakeholders and their diverse interests, needs, abilities and preferences

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### Additional Information

#### Behaviours

1. design, develop and monitor processes, strategies, products and/or services that are sustainable over the medium and long term
2. set objectives and create cultures that are ethical and sustainable
3. establish and agree with key stakeholders measurable objectives
4. accurately calculate risks, and make provision so that unexpected events do not impede the achievement of objectives
5. present information and arguments convincingly and in ways which gain the commitment and support of others
6. deploy a range of legitimate strategies and tactics to influence people
7. create a sense of common purpose
8. show sensitivity to internal and external politics that impact on your own area of work
9. identify and work with people and organisations who can provide support for own work
10. ensure effective engagement with target groups, policy makers and other key stakeholders
11. maintain up-to-date information on the political, economic, social, technological and legal factors that impact on work
12. demonstrate a clear understanding of the organisation's target and stakeholder groups and their
13. anticipate likely future scenarios based on a realistic analysis of trends and developments
14. work towards a clearly defined vision of the future
15. encourage others to contribute ideas and to reach a consensus

#### Glossary

##### **Resources**

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

##### **Stakeholders**

These include all those involved in, or affected by, the social marketing strategy and the issues it is seeking to address

##### **Key stakeholders**

These are those with the greatest interest in or influence on the issues; they will always include the target groups or intended beneficiaries of the strategy

##### **Partnership**

It is recognised that a social marketing strategy usually involves a number of organisations working in collaboration or as a "partnership"

##### **Review of social marketing goals**

This may be done using PESTLE (analysis of Political, Economic, Social, Technological, Legal and Environmental factors), SWOT (analysis of

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Strengths, Weaknesses, Opportunities or Threats) or similar techniques

#### **SMART objectives**

These are Specific, Measurable, Achievable, Realistic and Time-limited

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**Relevant occupations** 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; 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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**Suite** Social Marketing

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**Key words** social marketing strategies; corporate social responsibility strategies

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