
Overview

This unit is about evaluating and reporting performance and outcomes of an organisation's or partnership's social marketing strategies. This is a cyclical activity, with many iterative loops, so the performance standards are not necessarily in chronological order.

This unit is for people in strategic roles who evaluate and report on the performance of social marketing strategies.

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Evaluate and report on social marketing strategies

Performance criteria

- You must be able to:*
- P1 establish and agree with key stakeholders a monitoring and evaluation framework which incorporates:
 - P1.1 a baseline from which to monitor progress and impact, which is informed by the findings from social marketing research
 - P1.2 objectives and key performance indicators against which to monitor progress and impact
 - P1.3 process evaluation mechanisms to monitor activities and results against objectives
 - P1.4 impact evaluation mechanisms for outcomes which identify the contribution of the social marketing programme and the influence of external factors
 - P1.5 feedback and communication mechanisms to provide learning to the project team and others, and to incentivise the target groups
 - P1.6 mechanisms to calculate return on investment
 - P2 identify and agree with key stakeholders the budget and resources available for monitoring and evaluation activities
 - P3 identify existing or innovative methods, tools and techniques and evaluate their suitability and reliability for collecting and analysing monitoring and evaluation data and information
 - P4 use suitable, reliable and cost-effective methods to collect
 - P4.1 quantitative data on outputs, key performance indicators and outcomes
 - P4.2 qualitative information to continuously develop assumptions and insights
 - P5 use suitable, reliable and cost-effective methods to conduct statistical and qualitative analysis of data and findings, including analysis of return on investment
 - P6 use your analysis to monitor how your strategy is progressing against its objectives, and to identify any unintended impacts, positive or negative
 - P7 provide feedback at suitable times and in appropriate formats:
 - P7.1 to help project management and delivery staff decide how to capitalise on the findings, identify further scoping and follow-on activities or determine to abort the strategy
 - P7.2 to incentivise and reinforce beneficial behaviours amongst target groups
 - P8 take into account all known factors in assessing:
 - P8.1 the impact of your strategy , identifying the contribution of the social marketing programme and the influence of external factors
 - P8.2 the effectiveness of the process, learning from how the work was undertaken
 - P9 report the findings of your evaluation to key stakeholders, emphasising

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- the lessons to be learned from both positive and negative findings
- P10 seek feedback on content and format of the report from relevant people and make appropriate changes

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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 budgeting principles, methods, tools and techniques
- K3 communication principles, methods, tools and techniques
- K4 decision-making principles, methods, tools and techniques
- K5 evaluation principles, methods, tools and techniques
- K6 information management principles, methods, tools and techniques
- K7 legal and organisational/partnership requirements for the management of information
- K8 legal and organisational/partnership requirements relevant to social marketing
- K9 monitoring principles, methods, tools and techniques
- K10 objective setting principles, methods, tools and techniques
- K11 principles, methods, tools and techniques for calculating cost-effectiveness and return on investment(ROI)
- K12 reporting principles, methods, tools and techniques
- K13 resource management principles, methods, tools and techniques
- K14 social marketing principles, methods, tools and techniques
- K15 validation and verification principles, methods, tools and techniques

Industry/Sector Specific Knowledge & Understanding

- K16 current and emerging trends and developments in the sector internationally, nationally and locally
- K17 industry/sector, organisational/partnership and professional codes of practice
- K18 legal, regulatory and ethical requirements in the industry/sector

Context Specific Knowledge & Understanding

- K19 codes of practice relevant to your role
- K20 objectives of your area of responsibility
- K21 organisational/partnership resources
- K22 organisational/partnership vision, mission and strategic objectives
- K23 sources of data, information and knowledge
- K24 stakeholders and their diverse interests, needs, abilities and preferences

Additional Information

Behaviours

1. constantly seek to improve performance
2. present information clearly, concisely, accurately and in ways that promote understanding
3. keep people informed of plans and developments
4. comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes
5. establish and agree with key stakeholders measurable objectives
6. monitor quality of work and progress against plans
7. gather and analyse information from a variety of sources
8. display a good understanding of how different factors in the work context relate to each other
9. demonstrate a clear understanding of the organisation's target and stakeholder groups and their requirements
10. identify systemic issues and trend and recognise their impact upon current and future work
11. identify strengths, weaknesses, opportunities and threats to current and future work
12. build a total and valid picture from restricted or incomplete data
13. articulate the assumptions made, and risks involved, in understanding a situation
14. encourage others to contribute ideas and to reach a consensus

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

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

CFASMB2.2V3.0

Evaluate and report on social marketing strategies

Developed by CFA Business Skills @ Work

Version number 1

Date approved March 2009

Indicative review date March 2011

Validity Current

Status Original

Originating organisation Chartered Institute of Marketing

Original URN [ORIGINURN]

Relevant occupations 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

Suite Social Marketing

Key words social marketing strategies; corporate social responsibility strategies
