
Overview

This standard is about establishing strategies and action plans to meet the social marketing goals. This is a cyclical activity with many iterative loops, so the performance criteria are not necessarily in chronological order. For example, it may be necessary to review and evaluate existing strategies, before creating new ones.

This standard is for professionals in managerial roles who take the lead on behalf of an organisation or partnership for defining and gaining agreement on social marketing goals and the strategies for achieving them.

Performance criteria

You must be able to:

1. select and apply relevant social marketing, behavioural, exchange and social science theories, models, frameworks and research to inform development of a social marketing strategic plan
2. identify and analyse the strategic issues, policy objectives and behavioural challenges to be addressed by the social marketing programmes
3. apply ethical principles to the conduct of research, developing, implementing and evaluating a social marketing plan
4. identify and engage stakeholders and their interests in relation to the issues, policy objectives and behavioural challenges
5. develop social marketing goals and agree these with key stakeholders
6. establish engagement with key stakeholders and target groups, affected by the issues and behavioural challenges
7. agree with key stakeholders the core values underpinning the social marketing strategies and how these values are to be expressed through a coherent brand
8. design and implement an evaluation plan, including a monitoring system to assure programs are on track to achieve goals and meet agreed quality and efficiency standards
9. create evidence-based strategies and action plans to support the social marketing goals
10. gain support and approval from key stakeholders for social marketing strategies and action plans
11. carry out risk assessment of your strategies to minimise any adverse impacts and take account of potential effects
12. identify and access the resources required for the social marketing strategies and action plans
13. allocate responsibilities and resources, coordinating and monitoring activities in order to implement the strategies
14. identify and define the primary and secondary target audiences
15. review the strategy to identify factors which may impact on or compete with social marketing goals

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16. evaluate the evidence from social marketing research relevant to the target groups, interventions or other relevant activities
 17. identify any legal, organisational and professional constraints which may guide, modify or limit the formulation of social marketing goals
 18. consider and resolve with key stakeholders any ethical considerations relating to social marketing goals
 19. monitor and evaluate the strategies against the social marketing goals
 20. pilot and review the social marketing strategies and action plans
 21. ensure compliance with the legal, organisational, code of practice requirements and policies relevant to your role, your organisation and the activities being carried out

Knowledge and understanding

You need to know and understand:

1. the relevant social marketing, behavioural, exchange and social science theories, models, frameworks and research which inform social marketing strategic plan development
2. the strategic issues, policy objectives and behavioural challenges to be addressed by the social marketing programme
3. the ethical principles of conducting research, developing, implementing and evaluating social marketing plans
4. the current and emerging trends and developments in the sector internationally, nationally and locally
5. the relevant principles, methods, tools and techniques for engaging with key stakeholders and target groups, including vulnerable and hard-to-reach groups
6. the development methods of social marketing goals
7. the relevant stakeholders, target groups, their diverse interests, needs, abilities and preferences
8. how to develop core values for the social strategy and express them through the coherent brand
9. the monitoring and evaluation techniques for the strategy against the marketing goals
10. the evidence-based strategies and action plans supporting the social marketing goals
11. the social marketing compatible marketing mix models
12. how to obtain the stakeholders' support and approval for the social marketing strategies and the action plans
13. the principles of risk assessment and relevant mitigation strategies to minimise any adverse impacts
14. the resources required for the social marketing strategies and action plans
15. how to coordinate and monitor social marketing activities to implement the strategies
16. the sources of primary and secondary target audiences
17. the factors potentially affecting the social marketing goals

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18. how to evaluate the evidence from social marketing research and the potential impact of interventions, programmes and other activities
 19. the legal, organisational and professional constraints that influence or impact on the social marketing goals
 20. the relevant considerations relating to social marketing goals and how to resolve these with key stakeholders
 21. why it is important to review the social marketing strategies and action plans
 22. the legal, organisational, code of practice requirements and policies relevant to your role, your organisation and the activities being carried out

Glossary

Resources

These 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.

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 Strengths, Weaknesses, Opportunities or Threats) or similar techniques.

External Links