



Social

Marketing

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BEST
Workplaces
for CommutersSM

PRR

Social Marketing Planning Process

Step #1: Establish Goals and Objectives

Step #2: Determine Research Needs

Step #3: Define Desired Behavior Change

Step #4: Target Audience Identification

Step #5: Message Development

Step #6: Identify and Recruit Partners

Step #7: Create the Communications Plan

Step #8: Design Evaluation Methodology

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Step #1: Establish Goals and Objectives

**“If you don’t know where you are going,
any road will get you there.”**

- Alice in Wonderland

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Step #1: Establish Goals and Objectives

- **Determined up-front**
- **Goals are broad – what is success?**
- **Objectives are specific and measurable – how will you know when you've achieved success?**
- **Need a baseline from which to measure change**
- **Ideal is to measure outcomes, but in some cases can only measure process**

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Step #2: Determine Research Needs

- In order to improve something you have to be able to change it.
- In order to change it you have to be able to understand it.
- In order to understand it you have to be able to measure it.

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Step #2: Determine Research Needs

Requirement for building effective programs

- Don't make the mistake of thinking that people will change behavior because it's the right thing to do
- Don't reinvent the wheel—look for and use interesting sources
- **Quantitative and Qualitative**
 - Surveys, focus groups, intercept interviews, one-on-one interviews
 - Online surveys
- **Let the research guide program development**



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Step #3: Define Desired Behavior Change

Behavior Change Process:



Or...



Or...

Trial



Unsuccessful Experience



Target Lost

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Step #3: Define Desired Behavior Change

- **What behaviors do you need to change to achieve your goal?**
- **Behaviors should be as specific as possible.**
- **What stage is your audience at on the behavior change process?**
- **If multiple audiences, each audience may be at a different stage.**
- **Are there alternate behaviors that will need to be adopted?**

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Step #4: Target Audience Identification

- **Identify all potential audiences**
- **Categorize audiences**
 - Primary audience (that you want to change their behavior)
 - Influencer audience (that can influence your primary audiences to change behavior)
- **Prioritize audiences**
- **Audience profiles**
 - Demographics (Who are they?)
 - Psychographics (How do they feel? What do they think?)
 - Stage on behavior change process model
- **Barriers and Motivations**
 - Barriers (what is preventing the audience from changing its behavior?)
 - Motivations (what would get the audience to change its behavior?)

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Step #5: Message Development

Fact:

**The public is exposed to 2,000-3,000
marketing messages per day**

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Step #5: Message Development

Fact:

**You have 3-5 seconds to catch
someone's attention**

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Step #5: Message Development



Funded by the Local Hazardous Waste Management Program in King County and the Department of Ecology

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Step #5: Message Development

Benefits not Features

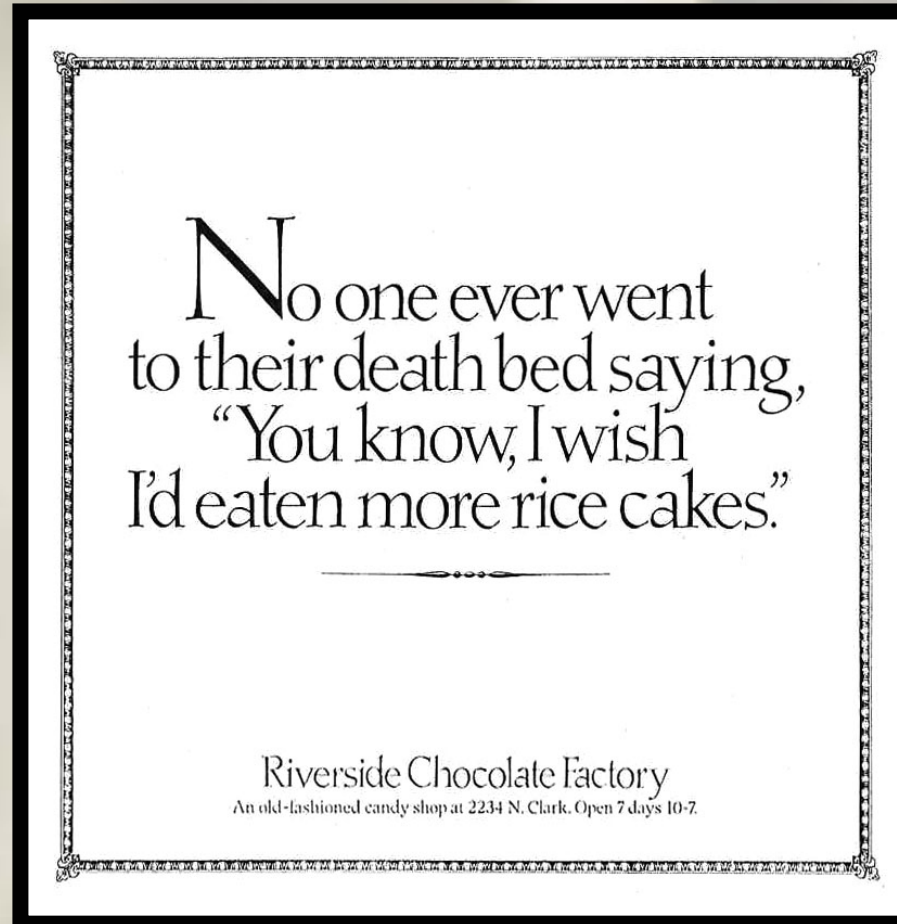
**Our 9pm news is
like their 10pm news.
Only you're awake.**



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Step #5: Message Development

Benefits not Features



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Step #5: Message Development

Benefits not
Features



Money talks.
We translate.

With its plain English coverings of personal finance, taxes and global markets, The Wall Street Journal will have you talking money like a native. Subscribe today.

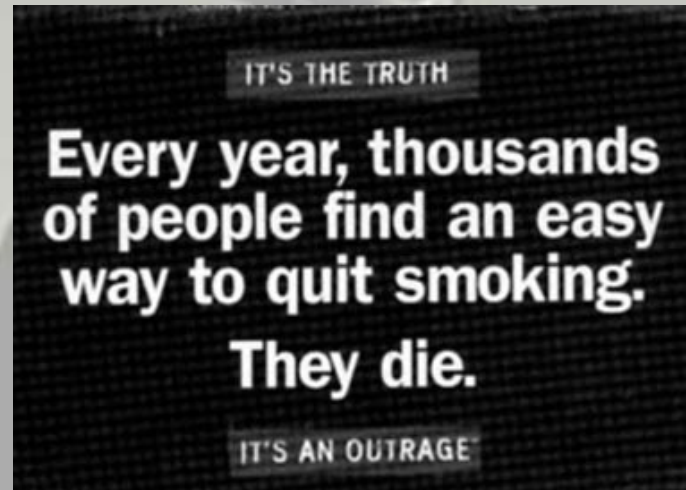
The Wall Street Journal.
The daily diary of the American dream.

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Step #5: Message Development

Making an Emotional Connection:

TRUTH campaign:
Created rage against big tobacco among teenagers

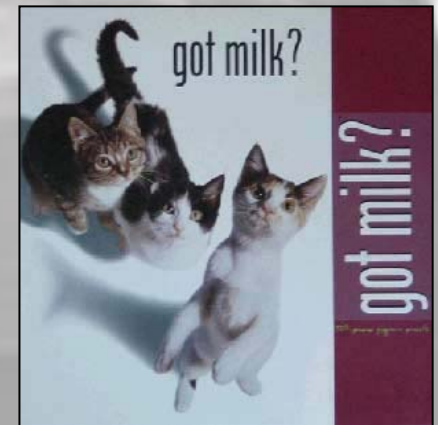


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Step #5: Message Development

Making an Emotional Connection:

Got Milk:
Determined that the only time that people think about milk is when they are out of it



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Step #5: Message Development

Making an Emotional Connection:

Michelin tires:
Made tires about safety



**IF YOU'VE GOT THE CAR,
WE'VE GOT THE TIRE.**

You've got a family car. Now you've got the duty of looking after it.

Our new MICHELIN Safety tire has a 900 Cord Breaker Limit System, the (Anti-Spin) MICHELIN Grip, a special pattern design and new MSRP gives you the life of the road and handling that only a Michelin tire can deliver. (See your local MICHELIN dealer.)

If you're not a fan of car repairs or road work, we've got to say that will make your drive a lot smoother.

Our new MICHELIN Safety tire has a 900 Cord Breaker Limit System, the (Anti-Spin) MICHELIN Grip, a special pattern design and new MSRP gives you the life of the road and handling that only a Michelin tire can deliver. (See your local MICHELIN dealer.)

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MICHELIN®
185-200-2000
www.michelin.com



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Step #6: Identify and Recruit Partners

- **Who else will benefit from this effort?**
- **Who can help leverage campaign resources?**
- **Who can help carry campaign messages?**
- **Consider private companies, public sector agencies and non-profit organizations**
- **Look for those with a history of community involvement**
- **Look for partners whose “customers” are the same as your target audience**

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Step #6: Identify and Recruit Partners



ENERGY STAR Partnership with McDonald's

- ✓ Partner benefit?
- ✓ Leverage resources?
- ✓ Carry campaign message?
- ✓ Complimentary customer segments?

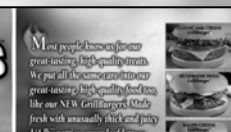
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Step #6: Identify and Recruit Partners

1. BWC partnerships with local TDM agencies

2. Dare to Care about the Air Partnership with local businesses

- ✓ Partner benefit?
- ✓ Leverage resources?
- ✓ Carry campaign message?
- ✓ Complementary customer segments?



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Step #7: Communications Plan

- **Biggest mistake in planning a social marketing campaign – people start with this step**
- **Steps 1-6 are the foundation of the communications plan**
- **Strategies and tactics – how you are going to communicate with your audiences**
- **All strategies and tactics should help achieve the campaign objectives**



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Step #7: Communications Plan

Strategies and Tactics Toolbox:

Friend to Friend, Face to Face

- **Most effective form of communication**
- **Utilize existing networks**
- **Ask people to make commitment (pledge forms)**

Social Marketing

Step #7: Communications Plan



For Many Kids, This Is
Their First Sign of Help.

kids.health.2001.
ALL our children deserve health care.

We're Solving the Problem Friend-To-Friend

We all rely on individuals we trust for advice and guidance. We're reaching out to uninsured parents and guardians through the following network of "trusted advocates" - individuals who have earned this vital trust.

Seattle Public Schools:

In October 1998, the late John Stanford, who served as an honorary chair of **kids.health.2001.**, wrote to all parents and guardians urging them to insure their children. In September 1999, Superintendent Okcheleke and Mayor Schell wrote to all parents reaffirming Stanford's message. School nurses and family support workers are educating families about free health insurance and helping them apply on behalf of their children.

City Year:

kids.health.2001. sponsors a City Year health team of ten young adults, aged 17 to 24, who reach out and enroll teenagers and others through youth programs, community events, neighborhood centers, and food banks.

Multi-Ethnic Outreach:

Our community outreach and enrollment programs are giving uninsured children and teenagers of color a chance at better health. Public Health-Seattle and King County has outreach and enrollment workers targeting the Spanish speaking and African American communities through visits to homes, shops, restaurants, and cultural events. The Cross Cultural Health Care Program is focusing on culturally sensitive approaches to outreach and enrollment within South Seattle's Filipino, Spanish speaking, and Ethiopian communities.

Medicaid Outreach Network:

The **kids.health.2001.** campaign collaborates with a Medicaid outreach network, including agencies such as the Center for Multi-Cultural Health, Chalkcare Resources, Evergreen Health Care Access, King County Community Health Centers, Street Outreach Services, People of Color Against AIDS Network, and Public Health-Seattle and King County. Working together, we share plans and resources, reduce duplication, and increase applications and enrollments.

Teen Health Centers:

Teenagers can inform and influence their parents and guardians about health insurance for themselves and their siblings, and can self-enroll if they live alone. **kids.health.2001.** is working with the Teen Health Centers to identify, educate, and enroll uninsured teens.

Hospital-Based Outreach:

Two health-care systems participating in **kids.health.2001.** are recruiting and training their employees to identify, educate, and refer eligible parents and guardians for enrollment. These trusted advocates can help uninsured kids in emergency rooms, hospital clinics, and in their own neighborhoods. If successful, this strategy will be expanded to all hospitals and systems participating in **kids.health.2001.**

Community Health Access Program (CHAP):

With just a phone call to CHAP, 1-800-756-KIDS (5437) families can get help with health insurance applications, eligibility questions, health plan enrollment, and referrals to doctors, dentists, and other health services. Bilingual staff are available to converse in the caller's own language.

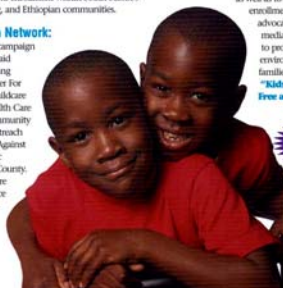
Communications:

In support of our outreach and enrollment efforts, **kids.health.2001.** is carrying out a public relations, marketing, and education campaign. We are providing materials to communicate directly with parents and guardians, as well as to support outreach and enrollment workers and other trusted advocates. We are also relying on free media publicity and paid advertising to provide the favorable marketing environment we need to reach families with our message: "Kids Can Get Health Care Free and Easy."

NEW!

Now Even More
Families Can Get Help!

A new, low-cost health insurance option exists for families whose income exceeds the Medicaid limits. Call 1-800-756-5437 for more information.



Friend-to-Friend, Face-to-Face Example: Trusted advocate brochure from kids.health.2001 program

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Step #7: Communications Plan

Strategies and Tactics Toolbox:

Public Relations

- Third party credibility
- Need real news – what is your hook?
- Holding a media event does not mean the media will come
- Provide facts and figures
- Create a visual (*for broadcast*)
- Cannot control message

Social Marketing Step #7: Communications Plan

Public Relations Example: Best Workplaces for Commuters media coverage

CENTRAL AND EAST COUNTY
CONTRA COSTA TIMES
 Thursday, July 24, 2003 SECTION F, Page 4

Business parks get commuter award

By Lisa Vorderbruggen

Federal officials have named the Bishop Ranch and Hacienda business parks official "Best Workplaces for Commuters" districts, the first in the state to receive the designation.

Unveiled today, the title provides a kind of good commuting seal of approval for employers and the nearly 50,000 workers in the San Ramon and Pleasanton business parks.

The U.S. Environmental Protection Agency and the Department of Transportation started the program last year, naming 83 Bay Area firms and public agencies to the "Commuter Choice Employer" list.

They hope the recognition will nudge employers to promote alternatives to driving alone to work.

Officials bestowed the district title this year on four regions that provide commuter benefits to a collection of tenants rather than companies that supply services to their own workers. The other winners are in Atlanta and Denver.

An organization of 1,000 employees that offers commuter services can save its workers \$13,000 in taxes and \$180,000 in gas, parking and vehicle costs annually, said EPA program manager Robin Snyder.

Workplaces such as Hacienda and Bishop Ranch save "their employees time and money, while reducing congestion and air pollution," Snyder said.

To win the commuter-friendly label, a business park or an employer must comply with a checklist designed to cut down on solo driving.

Business parks have to offer transit or car pool subsidies, provide telecommuting, provide park-and-rides, showers for bikers and ride-sharing services, and appoint a staff person to coordinate benefits.

Hacienda and Bishop Ranch pioneered large-scale East Bay commuter services, including the subsidized bus routes, a transportation resource center for workers and incentives.

Designation as a district provides an "unbiased and easily identifiable seal of standards for mass internally and externally," said Bishop Ranch transportation program manager Marco McGuire.

The parks also consider commuter services an integral part of the amenities they offer to lure or retain businesses.

"Our programs seek to actively incorporate a variety of alternatives into the design and operation we realize these programs are necessary to meet the needs of today's workforce," said park manager James Paxson.

The EPA will release the 2003 commuter-friendly company list later this year.

PLEASANTON • LIVERMORE • DUBLIN
THE VALLEY TIMES
 Thu. July 24, 2003 CentralCostaTimes.com

44 • 9 • THURSDAY, JULY 24, 2003

Business parks receive commuting accolades

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Tri-Valley Herald
 Saturday, July 26, 2003 LOCAL NEWS

Hacienda, Bishop Ranch business parks lauded

By Brooke Bryant, STAFF WRITER

Two Valley business parks are the first in California to be designated "Best Workplaces for Commuters Districts" by a coalition led by the Environmental Protection Agency. Hacienda Business Park in Pleasanton and the Bishop Ranch Business Park in San Ramon get the nod in a new category of the Best Workplaces for Commuters list that a number of Valley businesses already belong to.

Only four other districts across the country have qualified for the designation, including employment centers in Denver and Atlanta. A district is an area where the transit benefits extend beyond individual employees, like downtown centers, business parks and shopping malls.

"I think, yes, it does help us to be able to say, hey, we're... providing something that's head and shoulders above the rest," said James Paxson, Hacienda's general manager.

Paxson was honored earlier this month as a "Clean Air Champion" for his efforts to replace the solo drive as the commute method of choice. Both business parks offer a range of commuter benefits, including free on-site showers for bikers, cash incentives for joining and forming carpools and a free ride home in case of emergency.

At Hacienda, about one-fifth of the employees use the free bus passes the park issues. Paxson said One of Bishop Ranch's most popular programs is a free express bus pass worth about \$100 a year, said Transportation Program Manager Marco McGuire. Surveys at both business parks indicate that about 30 percent of employees use alternative commute methods to get to work.

"That's much more than you would expect to see in a typical sub-urban office environment, especially one that has free parking," Paxson said.

Instead of losing riders in the past few years, when many transit systems have struggled to stay afloat, the park's ridership has "skyrocketed," McGuire said.

According to bus surveys the park has done, about 12 percent of passengers don't even own cars, she said. Hacienda and Bishop Ranch join a long list of Bay Area employers that the coalition lauds for their commitment to transit.

"By offering commuter benefits, an organization with 1,000 employees can save its workers \$13,000 in taxes and \$180,000 in gas, parking and vehicle costs each year," said Robin Snyder, the EPA's national program manager. "Employers that locate in Best Workplaces for Commuters Districts are saving their employees time and money, while reducing congestion and air pollution."

Environmental Protection Agency
 SUBJECT Environmental Protection Agency
 PROGRAM ABC 7 News At 6:00
 MARKET San Francisco, CA
 STATION KGO-TV

DATE 10/24/2002
 TIME 6:00 PM
 LENGTH 45

ABC 7 NEWS AT 6:00
 (MUSIC IN) MALE (VO). This is ABC 7 News At 6:00. (MUSIC OUT)

MALE ANCHOR: The Environmental Protection Agency is praising dozens of local employers for helping to ease the commute on Bay Area roads.

ANCHOR (VO): The EPA says more than 149,000 people work for these employers. Few of the other companies on the list, Apple, Hewlett-Packard, Oracle, Pixar, and Lockheed Martin.

ROBIN SNYDER: They're helping to address the challenges of getting to work when you have such congestion and traffic backups, and issues of that nature.

THE EMPLOYERS OFFER THEIR WORKERS COMMUTING BENEFITS LIKE TAX-FREE TRANSIT PASSES, VAN POOL SUBSIDIES, AND ON-SITE DAY CARE, EVEN TELECOMMUTING.

Print coverage for Hacienda and Bishop Ranch Business Districts

Broadcast coverage for Yahoo!

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Step #7: Communications Plan

Strategies and Tactics Toolbox

Advertising

- **Print, broadcast, web, direct mail, outdoor**
- **Can be expensive**
- **100% control of message**
- **Choose placements with best reach to your audience**
- **Invest in good creative**

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Step #7: Communications Plan

Advertising
Example:
Office of National
Drug Control Policy



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Step #7: Communications Plan



**Advertising Example:
Marketing leave-behind
for King County “Get in
the Loop”**

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Step #7: Communications Plan

Strategies and Tactics Toolbox

Community Outreach and Events

- **Establish a community leadership position**
- **Direct contact with audiences**
- **Leverage into media relations opportunities**



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Step #7: Communications Plan

DUMP NO WASTE



DRAINS TO BAY

DUMP NO WASTE



DRAINS TO LAKE

DUMP NO WASTE



DRAINS TO RIVER

DUMP NO WASTE



DRAINS TO STREAM

Community
Outreach and
Events Example:
Volunteer
Stenciling

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Step #7: Communications Plan

Strategies and Tactics Toolbox

Internal Communications

- If trying to influence an audience within an organizational structure
- Utilize existing communications channels (*e.g. newsletters, e-mail, meetings*)
- Create buzz, then sustain
- Utilize internal advocates

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Step #7: Communications Plan



Internal Communications

Example: Newsletter for members of the Washington Education Association

Social Marketing

Step #8: Design Evaluation Methodology

- **Plan strategy up front**
- **Measure and quantify behavior change**
- **Track over time**
- **Look for trends**
- **Learn from results**

Social Marketing Summary

- Eight step planning process
- Can be applied to any social marketing challenge
- Use regardless of budget limitations