

Social Marketing Audit

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1. **Examine how you have framed the issue. Be wary of the following assumptions:**
 - a. Do you assume that the behavior is a problem?
 - b. Do you assume that the target audience is unaware of different behaviors, including one you are advocating?
 - c. Do you assume that the target audience is not motivated to engage in different behaviors?
 - d. Do you assume that the target audience is incapable of following the advocated recommendations?

2. **Keep the following points in mind when you design your project goals:**
 - a. Do your project goals have a behavior change target?
 - b. Are intermediate targets such as awareness, beliefs and attitudes included in your project goals?
 - c. Does the project goal have a realistic time frame?
 - d. Is cost-effectiveness an integral aspect of your project goal?

3. **Because audiences do not have the same concerns or the same priorities, are you employing the following steps to segment your audience?**
 - a. Did you identify the cohort group your target belongs to?
 - b. Do you have a clear understanding of possible physiographic, life-stage, emotional and socioeconomic trends affecting different cohort groups?
 - c. Are there regional/geographical differences within your audience?
 - d. Are there gender patterns in your audience?
 - e. Do behavioral usage rates differ in your audience?



“Influencing and changing behavior voluntarily are the ultimate goals of social marketers.”

4. **Do you know the target audience's decision-making process? Ask yourself the following questions:**
 - a. Have you asked the target audience members to explain why they chose to do what they do?
 - b. Have you assessed the trade-offs the target audience makes between various costs and benefits?
 - c. Do you know the weights or priorities for the different costs and benefits?
 - d. Do you know who else influences their decisions?

5. **Consider the following questions to remind yourself of the various marketing research options for customer analyses:**
 - a. Have you used good listening techniques to capture the voice of the customer?
 - b. Have you ensured that you have used an unbiased experimenter/listener?
 - c. Have you kept an open mind to adverse reactions to your proposals?
 - d. Do you have a faithful way of recording feedback?
 - e. Have you restricted your questions for feedback to ones that can be used in your marketing plan?
 - f. Have you obtained on-site insights to help you effectively implement the marketing mix?
 - g. Does your marketing research method allow you to observe or otherwise assess the alternatives used by your target audience?

6. **Because programs are not equally successful across audiences, are you undertaking the following steps to select mutually beneficial targets?**
 - a. Did you identify and prioritize your institution's goals?
 - b. What is the ability of each audience segment to meet your goals?
 - c. What does each audience segment seek from your institution? Which benefits are more or less important to them?
 - d. Which segments are you selecting as primary targets for your offering?
 - e. Which segments are secondary or tertiary targets?



“Listening to the customer’s reality almost always results in separating customers into clusters or segments with similar cost and benefit trade-offs.”

- 7. Are you considering these issues while designing a customized offering for each audience segment you are targeting?**
- a. Are you providing a “menu” of services so that customers can select (or reject) what they want (or don’t want)?
 - b. Can you identify effective distribution strategies that are direct or that use a strategic partner for each target segment?
 - c. Does your communication identify ways to overcome the costs/barriers that customers will face if they engage in your program?
 - d. Does your communication take into account methods to overcome the loss of gains/benefits that customers will face if they give up the alternative behavior?
- 8. For effective diffusion, are you considering the following issues?**
- a. Does your offering have a clear advantage over existing options?
 - b. Is your offering visible?
 - c. Is your offering simple?
 - d. Is your offering compatible with related products/services?
 - e. Can you identify ways to encourage opinion leaders and gatekeepers to promote your program?
 - f. Can you stimulate new opinion leaders?
- 9. Did you undertake the following steps for effective positioning?**
- a. Understand what the target audience values?
 - b. Define the competition?
 - c. Identify and choose points of parity?
 - d. Identify and choose points of difference?
 - e. Develop a project mantra?
- 10. Did you consider the following to manage project costs?**
- a. Conduct research that informs the marketing plan?
 - b. Consider combining two or more audience segments?
 - c. Leverage the synergies across audience segments?
 - d. Mass customize your product and service offerings?
 - e. Employ less personalized service in redesign?
 - f. Encourage more audience participation in your offering?



“The social marketing approach seeks to tailor the program to the target customers’ perceived benefits and costs.”