The DELTA Companion
Marketing Planning Made Easy

Koninkrijk der Nederlanden

Results Incubator

knowledge management for health impact

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INTRODUCTION

In this section, we...

- discuss characteristics of a good marketing plan,
- introduce the components of a 'DELTA' marketing plan through a visual graphic that will be repeated throughout this document, and
- present a brief example of the 'DELTA' approach as applied at PSI Angola.
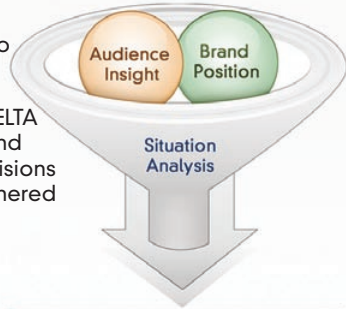
What is DELTA?

The DELTA process

'DELTA' is the name PSI gives to its approach to marketing planning.

The cornerstones of DELTA are Audience Insight and Brand Positioning. Decisions made and insights gathered here trickle down and influence all the other decisions made in the marketing plan.

If enough time and effort is spent getting these two things right, then you've gone a long way towards building a high quality marketing plan.

Audience Insight
Brand Position

Situation Analysis

Marketing Objectives

Product | Price | Place | Promo

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Work Plan & Budget

Characteristics of a GOOD marketing plan

It should be clearly logical, enabling uninformed readers to understand why each decision is made. Specifically, each section should...

- link clearly to the next section;
- offer hypotheses for why things have happened, rather than just reporting what has happened;
- summarize the author's conclusions and translate that into key implications for the plan's strategies;
- identify (when relevant) key information gaps that will help inform the research agenda.

It should be thorough but succinct, presenting relevant data as efficiently as possible. For example...

- short sentences and paragraphs are used instead of large blocks of text;
- bullet point paraphrases and graphs are even better than paragraphs; or
- PowerPoint presentations can be used.

It should sacrifice nice-but-not-important strategies or activities in order to be as focused as possible. In the end, plans that choose to do 'a little bit of everything' choose to water down their effectiveness.

These are TOOLS NOT RULES!

Use this TOOLKIT as it is meant to be used, as a set of tools to be adapted as appropriate, and not inflexible rules to be followed blindly.

A DELTA marketing plan has 4 sections

1 Where are we now?

- analyzes the current situation

2 Where do we want to go?

- specifies the objectives to be met

3 How do we get there?

- identifies strategies to achieve the objectives

4 How are we doing?

- outlines research and work plans with their budgets

The rest of this DELTA toolkit is divided into these four sections, each with its corresponding sub-sections.

A DELTA marketing plan is a strategic planning, management & alignment TOOL.

It's a strategic TOOL
- because it specifies strategies according to the '4P's' that are consistent with an in-depth understanding of the audience, and a brand positioning strategy.

It's a management TOOL
- because it specifies how financial resources will be allocated (via the budget), and provides a work plan that helps managers allocate human and other resources as well as monitor implementation.

It's an alignment TOOL
- because it helps your team internalize...

Who the target is;
(Via the Audience Profile tool)

Who our brand is;
(Via the Brand Onion tool)

How we will bring the two together.
(Via the 1-Page Summary sheet tool)

1 Where are we now?

Analyze the current situation

A **Situation Analysis** analyzes the context in which we operate in order to identify Strategic Priorities for the Marketing Plan. A Strategic Priority is a big picture theme or issue that the plan should address, such as 'improving quality perception of the brand'.

Audience Insight means getting to know the target group as a real person – like your neighbor – and not as a bunch of demographics.

Brand Positioning is the identification and promotion of the most important and unique benefit that your product/service/behavior stands for in the mind of the target group. Think of this as the emotional 'hook' upon which you will hang the rest of your marketing.

Audience Insight   Brand Position

Situation Analysis
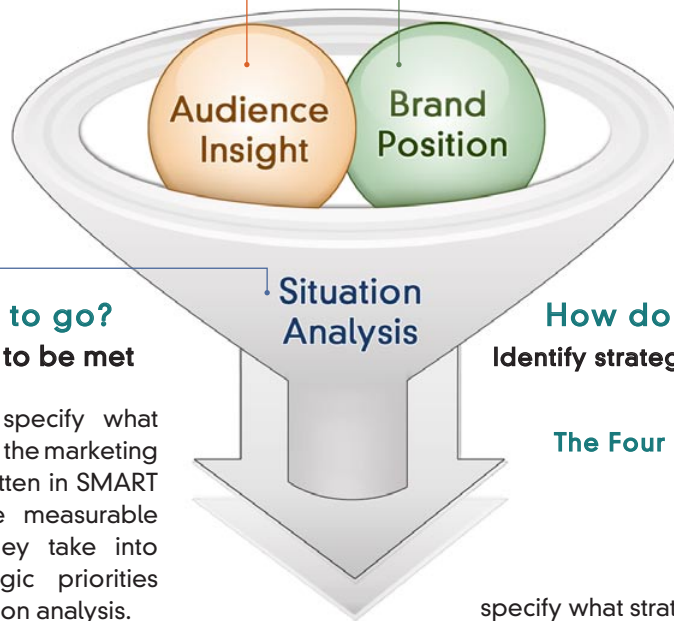
2 Where do we want to go?

Specify the objectives to be met

Marketing Objectives specify what you want to achieve during the marketing plan. They are usually written in SMART format, so that they are measurable and time-bound, and they take into consideration the strategic priorities identified during the situation analysis.

How do we get there? 3

Identify strategies to achieve the objectivesec

The Four Marketing 'P's' -
> Product,
> Price,
> Place and
> Promotion

specify what strategies we will use to achieve the marketing objectives.

Marketing Objectives

| Product | Price | Place | Promo |

Research Plan
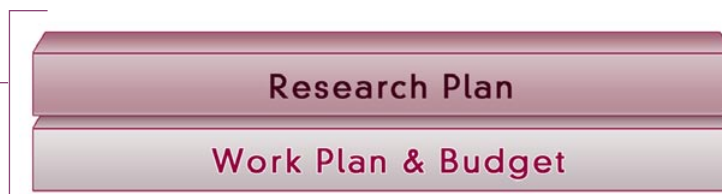
Work Plan & Budget

4 How are we doing?

Outline research and work plans with their budgets

> **The Research Plan** details how we will monitor and evaluate implementation of the plan, as well as fill in any information gaps about the target group.

> **The Budget** specifies how financial resources will be allocated.

> **The Work Plan** helps managers allocate human and other resources as well as monitor implementation.

The following is not an example of a marketing plan, but rather how the 'DELTA approach' helped lead PSI Angola through the marketing planning for Certeza, their safe water product.

SITUATION ANALYSIS PSI Angola wants to launch a safe water product. Currently, people must either boil or treat their water with chlorine to purify it. TRaC results show that the target group – mothers & caretakers of children younger than 5 years – have high knowledge about and feel at great risk from water-borne diseases. Indeed, Angola has recently suffered a severe cholera outbreak and the government has launched a massive public education campaign. Surprisingly, however, very few in the target group currently treat their water, nor do they report an intention to treat their water.

How can this be?
Are members of the target group simply bad mothers?

AUDIENCE INSIGHT

A 'day in the life' exercise quickly reveals that this target group is composed of anything but bad mothers.

A typical target group member rises each morning before dawn to clean the house and cook. After the children rise, she feeds them, sends them off to school and then goes to the market to work all day. Her husband is unemployed, wakes up late, and spends the day drinking with his friends. After work, she purchases that evening's meal with the money she has earned, cooks it, feeds her family, and then does some more cleaning before retiring to bed. The next day, she repeats it all over again.

With such basic insight into the target group's dual role as primary caregiver and provider, she quickly becomes a real person and not merely the demographic descriptor 'mother/caregiver of children younger than 5 years'. PSI Angola names her 'Maria' and nicknames her 'The Self Sacrificing Mother'.
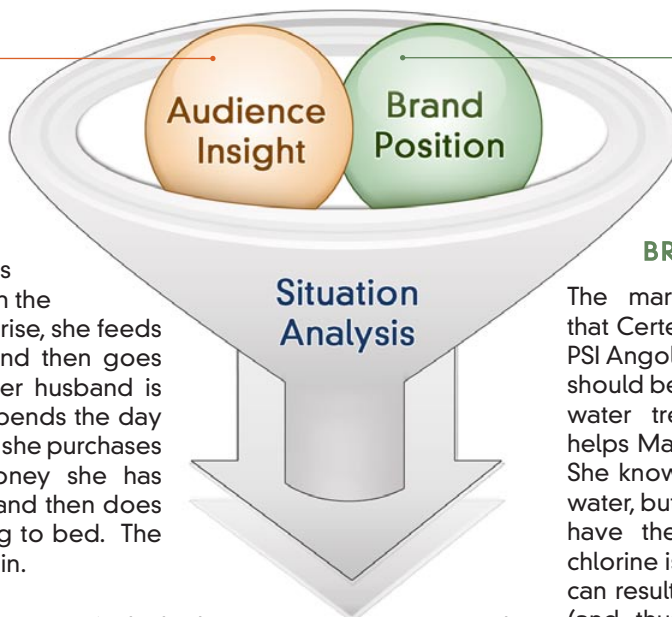
BRAND POSITIONING

The marketing team decides that Certeza, the brand name of PSI Angola's safe water product, should be positioned as the safe water treatment method that helps Maria be a good mother. She knows she should treat her water, but simply doesn't always have the time. Furthermore, chlorine is easy to mis-dose and can result in an unpleasant taste (and, thus, an unhappy family). Certeza will solve all those problems for her.

Marketing Objectives

| Product | Price | Place | Promo |

MARKETING STRATEGY

PRODUCT

The product formulation, packaging and instructions should make Certeza easy and quick to use. The resulting taste should be pleasant enough that Maria's family will enjoy it.

PLACE

Certeza should be readily available at places and during times of the day that accommodate Maria's busy lifestyle and daily routines.
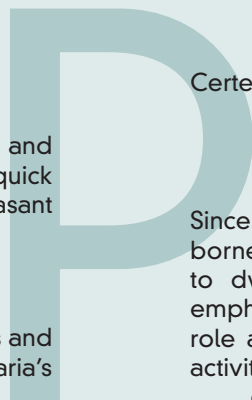
PRICE

Certeza should be sold at a price Maria can afford.

PROMOTION

Since Maria knows the basics about water-borne diseases, promotions don't need to dwell on this. Instead, adverts should emphasize that Certeza will help her fulfill her role as a primary caregiver. In addition, IPC activities can be used to demonstrate how easy it is to use and how pleasant it tastes

Where are we now?

SITUATION ANALYSIS

Summary

The Situation Analysis analyzes the context in which we operate in order to identify strategic priorities for the marketing plan.

Strategic priorities are themes or 'big picture' issues that the plan should address. They help you decide on your plan's marketing objectives and strategies. Examples of strategic priorities include improving quality perception of your brand or increasing sustainability through better cost recovery.

Some types of data to analyze when identifying strategic priorities are...

- health problems,
- Universe of Need (UoN) calculations,
- Total Market Approach,
- trial versus loyalty strategies,
- SWOT,
- lessons learned from research/experience,
- donor expectations & logframe.

These are discussed in detail in the appendices to this chapter.

Where are we now?
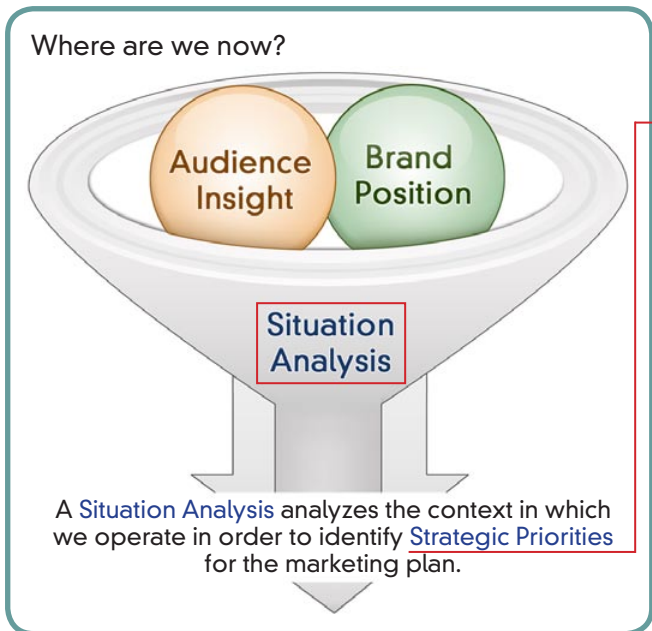
Audience Insight

Brand Position

Situation Analysis

A Situation Analysis analyzes the context in which we operate in order to identify Strategic Priorities for the marketing plan.

Strategic priorities are themes or 'big picture' issues that the plan should address. They help you decide on your plan's marketing objectives and strategies.

Strategic Priorities

Examples of Strategic Priorities include:
- Improve quality perception of your brand
- Increase sustainability through better cost recovery
- Decrease direct-to-retail distribution
- Improve targeting.

Some sources for compiling your Situation Analysis include…

Secondary data
- PSI Washington can do a literature review for you and pull all relevant secondary research studies. (http://new.psi.org/research/literature_reviews.html)

PSI Research
- TraC, MAP, FoQus studies, Mystery Client surveys, etc.

Environmental analysis
- E.g., what other health NGOs are doing, how the commercial & public sectors are structured for this health area.

Field data
- E.g., MIS statistics, feedback from program staff, the trade or clients/consumers.

Project logframe

A Strategic Priority might affect more than one marketing objective or strategy at a time. For example…

Strategic Priority	Marketing Strategies Affected
Improve quality perception of brand	**Product P** • Introduce new line extension – an "extra safe" variant • Update packaging **Price P** • Increase price

A Strategic Priority might affect a longer time period than just the immediate marketing plan. For example…

Strategic Priority	Marketing Strategies Affected
Improve financial sustainability	**Price P – Yr 1** • Develop plan to reach Level 3 cost recovery by end of Yr 2 • Implement first price increase in this plan by end Yr 1 **Price P – Yr 2** • Implement second price increase in the cost-recovery plan by end Yr 2

It's easy to overload the situation analysis with a bunch of facts that don't help you to identify strategic priorities.

Avoid reporting information that doesn't have a clear implication for your marketing plan. Examples of unhelpful facts might be…

- Zambia is a land-locked country; or
- Per capita GDP is $2300.

"Facts alone are not enough"; sometimes you need to hypothesize about WHY the facts say what they say.

An example

Unhelpful FACT When Presented on Own

Sales are down in the North West territories…

Helpful HYPOTHESIS That Provides Context to Fact

…and this could be because condoms from neighboring countries are 'leaking in' at lower prices.

If the purpose of a situation analysis is to identify strategic priorities, how exactly can you do this? One helpful paradigm is the concept of asking yourself…

WHAT?

Data collection
Using all the relevant sources you can identify, collect and report the type of facts that will help you make marketing decisions. Be thorough, but succinct, avoiding irrelevant information.

SO WHAT?

Data analysis
- When possible and appropriate, go beyond the facts and hypothesize about why they say what they do.
- Identify possible implications that those facts might have for your marketing plan.

NOW WHAT?

Strategic priority identification
Choose which implications you will pursue in the immediate marketing plan. Limit yourself to just 3-5 strategic priorities in order to provide focus to your plan. The less you try to do at once, the more likely you will succeed.

Examples

WHAT?	SO WHAT?	NOW WHAT?
In Zambia… secondary research suggests that VCT is most effective at changing the behavior of HIV discordant couples and HIV positive individuals. Only 3-5% of New Start Zambia's clients are couples and only 10% test positive (versus a national adult prevalence of 14%).	To date, the service has mostly targeted young people, which is likely why there are so few couples and HIV positive people. To align with VCT current best practices would require a major shift in targeting strategy.	Target those most likely to change their behavior, specifically… • Couples • Most at risk populations, such as migrant workers, MSM, CSW's, prisoners, etc.
In Benin… male partner support dramatically influences usage of Family Planning. In 2007, TRaC data showed that only 34% of non-users of a family planning method discussed family planning with their male partner compared to 68% of current users.	To date, family planning interventions essentially targeted women and considered male partners as a secondary audience. Yet contraceptive prevalence rate remained very low, between 6% and 7%. A shift of focus is required.	Therefore, addressing men as a primary target group rather than just a secondary audience becomes a Strategic Priority.
In Rwanda… penetration of Sur'Eau was only 16% in 2008. Even with the creation of new points of sale, the product didn't move through the pipeline.	Because trade margins were too high at the wholesaler level and too low at the retailer level, product didn't move down the pipeline.	Therefore, revising the structure of the distribution channel and the trade margins were strategic priorities for 2009. Specifically, PSI/Rwanda must: • Add a level of semi-wholesalers • Revise trade margin to increase the incentives for retailers to stock the product.

There are many types of data you can examine during the "What" phase, some of which are explained below and described further in the following sections.

1.1

Health problem, the behaviors that affect it and the populations at risk for it
- Recent trends in incidence or prevalence
- Populations groups most affected & why
- Behaviors that contribute to the problem
- Skews in geographic areas or times of the year.

Read the notes on Health Problems later in this section

Remember that no two situation analyses will look alike because no two situations are the same. In other words, there is no template for doing a situation analysis.

Example of a possible resulting strategic priority:
Changes in targeting or behaviors to be promoted

1.2

Universe of Need (UoN) calculations

- Quantify the number of naturally occurring risk occasions in this health area.
- Specify how this intervention will contribute to reducing them.
- Compare against your logframe's purpose level and determine if those objectives are realistic given the amount of unmet need and available resources.

Read more about this later on in this section

Example of a possible resulting strategic priority:

Contribute to marketplace development through better segmentation of our products

Example of a possible resulting strategic priority:

Improve IPC quality

1.3

SWOT

- An analysis of Strengths, Weaknesses, Opportunities, Threats (SWOT) is critical for identifying strategic priorities. This can also include lessons learned from previous marketing efforts.

Lessons Learned from Research/ Experience

- Evaluate what strategies and activities have worked well in the past and what has not using primary research as well as organizational knowledge and experience.

- The research can be either quantitative, such as TRaC or MAP or other quantitative studies; qualitative, such as FoQus; and even surveys with the trade or health professionals.

- Management Information Systems, while technically not 'research', are also important sources of information.

Read more about this later on in this section

Total Market Approach

- For product-based interventions, what is the trend in market share between socially marketed, public and private sector goods? Are we "crowding out" the private sector?

Trial versus Loyalty Strategies

- Do the UoN calculations and target audience choice point to primarily choosing a trial strategy (i.e., getting new people to begin using) or loyalty strategy (i.e., getting current users to use more)?

1.4

Donor Expectations & Logframe

This includes not just deliverables promised to the donor in a logframe or other document, but also any policies or agenda they might have, such as the promotion of ABC prevention strategies.

Example of a possible resulting strategic priority:

Focus on rural distribution in order to improve equity of access among lower SES segment.

Where are we now?
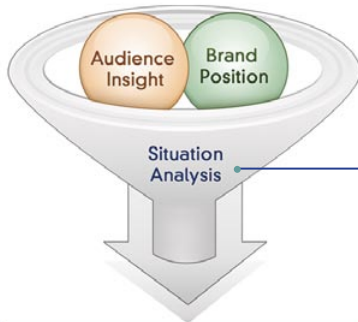
SITUATION ANALYSIS
Additional reading 1

Summary

Analysing the Health Problem

In this additional reading we discuss how to analyze data pertaining to...

- the health problem,
- the behaviors that contribute to it, and
- the target populations that are at risk of it.

The last topic provides detail on the difference between...

- Strategic Targets, and
- Tactical Segments.

In addition, criteria is provided that can help you identify viable Tactical Segments and choose between them when planning your marketing.

Start your situation analysis by examining **a** the health problem, **b** the behaviors that contribute to it and **c** the populations that are at risk of it.

1.1

a Health problem

Trusted secondary data sources, like UNAIDS or Demographic and Health Surveys, can be examined to learn what health issues cause the most problems for the country in question. Consider, things like…

- Prevalence and incidence of the problem
- Trends over time
- Any demographic or geographic skews.

b Behaviors

Some health problems are the result of multiple behaviors, and then you must decide which behavior(s) you will tackle. The same data sources mentioned above can usually help you identify which behaviors are thought to contribute most to the problem and, thus, which groups are most at risk. For example, in southern Africa, there are several behaviors that contribute to the spread of HIV, such as…

- Inconsistent condom use ⟶ within relationships
- Inconsistent condom use ⟶ during casual sex
- Concurrent sexual partnerships ⟶ among married and unmarried
- Low prevalence of circumcision ⟶ partners among males.

You must then choose the appropriate behavior/target group, considering your mandate and resources. If you plan to address just one cause of the problem, ideally others – perhaps inside PSI or outside – are addressing the remaining causes.

> Some PSI platforms develop marketing plans for the entire health sector rather than just one product, service or behavior. This way, they can better understand how each of the behaviors that contribute to a given health problem are going to be addressed.

c Populations at risk/target group

Sometimes after you've identified your risk population, you might need to do more work in order to decide exactly who to target within that population. It's not always desirable to target an entire risk population because it might be too heterogeneous and, thus, too difficult to reach effectively with just one set of marketing strategies and activities. For example Youth 15-24 is actually a very broad category with males and females who could be either in-school or out of school, employed, unemployed, etc.

To this end, we can think of there being several types of target groups

- Strategic Target – This is your long-term strategic audience to whom your product/service/behavior is positioned. Examples include Women of Reproductive Age (WRA) for a family planning program or sex workers (SW) for an HIV program.

- Tactical Segments – Sometimes called 'prime prospects' by commercial marketers, these are smaller and more homogenous sub-groups within the Strategic Target, which are pursued on a short-term tactical basis. Each Segment would require its own specific set of marketing strategies and activities. Some examples of Segments within the Strategic Targets of WRA and SW's include…

Examples

WOMEN OF REPRODUCTIVE AGE	SEX WORKERS
• New Users • Discontinuers • Non-intenders • New Mothers • WRA with Unmet Need	• Commercial SW's • Informal SW's • SW's with 'protectors' or pimps

1.1

C   Populations at risk/target group (continued...)

- You can choose more than one Tactical Segment for a given plan should you have adequate reason and resources. The following year you may or may not choose to continue addressing a given segment based upon the situation then.

- A brand will always be positioned to the broader Strategic Project Target. This enables you to switch between various Tactical Segments in different marketing plans without interrupting the continuity in the brand's marketing.

- Audience Profiles will be developed for each Tactical Segment you choose. This is discussed further in the Audience Insight section.

REMEMBER

Strategic Target	Tactical Segments
Broader and more heterogeneous	Narrower and more homogenous
Long term & strategic	Short term & tactical
Brand positioned to this group	Specific strategies/activities tailored to this group

- A Tactical Segment can be defined according to many different characteristics, including but not limited to the list below.

  » Demographics – This is the most common definition for segments and includes descriptors like age, sex, marital status, education level, occupation, etc. (e.g., HIV discordant couples)

  » Psychographics – PSI is also beginning to segment on things like values, attitudes or lifestyles.   For example, PSI Central America/PASMO's study of masculinity identified six psychographic segments –

An Example

El Buscador	– is trying to define himself
El Poderoso	– the traditional 'macho man', wanting power and control
El Energico	– a modern macho man who wants to change the world
El Protector	– provides for and protects his family
EL Relajado	– is easy going and tolerant
El Apasionado	– values emotions and ideas

  » Current/Recent Behavior – whether or not they have just started or discontinued the behavior in question (e.g., New or Discontinued Users of Modern Contraception and Inconsistent or Non Users of Condoms).

  » Intention to Perform the Behavior – e.g., Women with Unmet Need for Modern Contraception

  » Any combination of the above – e.g., young Buscadors aged 15-25 who occasionally use condoms.

- In short, you choose to target a given Segment because that's where you think you can get the greatest amount of immediate health impact. To this end, you can choose between Segments according to the following criteria:

  » Size of the group – is it large enough to have enough impact on the health problem?

  » Health risk – what percent of the group is 'at risk' and/or how much are they at risk? In other words, will I maximize my health impact by addressing this group?

  » Ability to persuade the group – how easy will it be to persuade them to change their behavior?

  » Ability to reach the group – how easy is it to reach this group? For example, reaching MSM in many Sub-Saharan African countries can be very difficult.

  » Cost to reach the group – will it require additional funds or efforts? To continue the example above, while it might be difficult to reach MSM, it might not be very expensive.

  » Equity – is this group of a lower or higher SES? Correcting disparities in services is a priority for many family planning programs.

1.1

c Populations at risk/target group (continued...)

An Example

Consider the following analysis from PSI Swaziland's Male Circumcision program as they chose between two Tactical Segments within their Strategic Target of Males 13-29.

Criteria	13-17 Year Olds	18-29 Year Olds
Health Impact	Would be higher (Less likely to already be HIV+)	Would be lower (More likely to already be HIV+)
Ease to Reach	Would be more difficult. (Parental consent required)	Would be less difficult. (No parental consent required)
Ease to Persuade	Would be more difficult. (Only 36% have expressed intention to get MC as per the latest DHS.)	Would be less difficult. (50% have expressed intention to get MC as per the latest DHS.)

For Yr 1, they chose to target the 18-29 year olds as they represented 'lower hanging fruit'. In Yr 2, they added in the 13-17 year olds, as this would generate more health impact. In addition, because younger people generally look up to their older counterparts, it was argued that targeting the older Segment first would help create a positive social norm for the younger Segment.

- There are several advantages to addressing specific Segments with a broader Project Target.

  ■ It increases the effectiveness of your plan, by allowing you to tailor your marketing strategies and activities to groups that are internally more homogenous than a broad Project Target is.

  ■ It allows you to optimize resource allocation by choosing Tactical Segments which have the greatest priority.

  ■ It prevents your product/service/behavior from being positioned to too narrow a group. For example, in a VCT project 'HIV+ Male Adults' could be a Segment within the broader, Project Target of 'Adults 18+'. However, the VCT brand should not be positioned to this narrow, target group as it could alienate other important groups, such as 'couples'.

Where are we now?
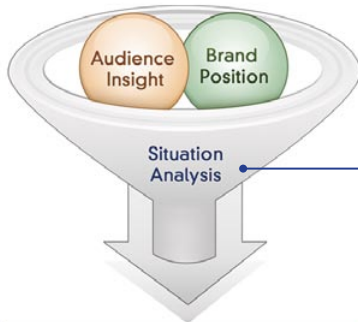
SITUATION ANALYSIS
Additional reading 2

Analysing the Universe of Need, Total Market and Trial vs. Loyalty Strategies

In this additional reading we present the following concepts:

o Universe of Need

- its definition,
- steps to calculate, and
- examples;

o Total Market Approach

- its definition, and
- goals;

o Trial versus loyalty strategies

- their definitions, and
- explanations of how each should guide your marketing planning.

This section discusses three concepts that are interlinked **a** Universe of Need (UoN), **b** Total Market Approach (TMA) and **c** Trial versus Loyalty strategies (Tvs.L).

1.2

a The Universe of Need (UoN) represents the number of people in the risk group and/or risk occasions in which there is an opportunity to influence the target audience's adoption of the promoted product, service or behavior.

» Commercial marketers will quantify the number of purchase occasions that exist in a product category. For example, to market chewing gum, a marketer would want to understand how many people in the country report chewing gum and how often, on average, they chew. Simple math then helps them understand how many pieces of gum the category sells in a given year.

» It is equally important for the social marketer to estimate the number of risk occasions for his target group/behavior. For example, imagine you are promoting condoms to sex workers (SW) in a red light district. You should try to estimate – through primary or secondary research – the number of SW's and the average number of clients they see in a given day or week. Simple math will then give you an estimate of the total number of condoms that need to be distributed to those SW's over the duration of the project.

» UoN can also be done for services as well as behaviors.

For Example
- Increasing male circumcision – If PSI has promised that 80% of males 13-29 will be circumcised within five years, UoN estimates can use census figures to estimate the number of individuals this equals.
- Decreasing visits to a Sex Worker – Multiplying the number of men who report purchasing sex by the average number of times they purchased, provides the total number of risk occasions that PSI would want to decrease.

» UoN calculations are useful because they help you…

- Compare the total number of risk occasions (the 'universe of need') to the number of risk occasions you think your project will cover. From a health impact perspective, it's important to understand if we are covering a majority or minority of the risk occasions in question.

- Consider the estimated contribution of other players, including the private and public sectors. For example, PSI's SW program might only cover 25% of the UoN, but public sector free distribution might cover an additional 50%. See next section re: Total Market Approach for more on this idea.

- Quantify the log frame goals you may have promised a donor. For example, how many condoms equal a promised 10% increase in consistent condom use among the target group? Is this number realistic considering what you know of the project and its resources?

Steps to calculating UoN:

1 Estimate the size of the target group

2 Calculate the number of risk occasions per target group member

3 Multiply the two by each other.

- Forecast latent demand. Sometimes a DHS will ask about intention to perform a given behavior (e.g., unmet need for modern contraception or 'intent to get HIV tested in the next 12 months'). This can be compared to your UoN calculations to better understand how many target group members are likely to be easily persuaded.

- Decide if you want to pursue a 'trial' or 'loyalty' strategy. See the following section by the same name.

Work with…

💬 your PSI Washington health area technical department (e.g., HIV, Malaria, etc.) to agree upon a methodology for calculating UoN for your target group/behavior,

💬 your Regional Researcher to ensure that your TRaC studies are asking the necessary questions to calculate UoN.

1.2

Example 1

PSI/Myanmar Universe of Need for Condom Use among Sex Workers and their Clients. Total number of FSW in target: 80,000

Below from PSI TRaC '06

		sex acts	protected	unprotected
% having a Regular Partner	48%			
No. of partner	1			
No. of sex act/week	1	sex acts	protected	unprotected
Condom Use	18%	1,996,800	359,424	1,637,376

		sex acts	protected	unprotected
% of Wholenight Clients	100%			
No. of partner	2			
No. of sex act/week	7	sex acts	protected	unprotected
Condom Use	88.3%	29,120,000	25,712,960	3,407,040

		sex acts	protected	unprotected
% of Quick Sex Clients	100%			
No. of partner	4			
No. of sex act/week	6	sex acts	protected	unprotected
Condom Use	89.7%	24,960,000	22,389,120	2,570,880

	sex acts	protected	unprotected
TOTAL:	**56,076,800**	**48,461,504**	**7,615,296**

Thus the existing Universe of Need (sex acts remaining that need to be protected) is 7,615,296. By using sex worker data to calculate this, we have automatically already calculated it for clients of sex workers, the main target for PSI/Myanmar's condom brand.

Example 2

Universe of Need: VCT – Lesotho

This example illustrates how UoN calculations can be used to set client flow targets.

Men ages 25-35		Source:
# of men ages 25-35 in Lesotho	205,000	Census
% tested in last 12 months	35.90%	TRaC
# tested in last 12 months	73,595	(total pop X 35.9%)
% to be tested in 2009	40%	(behavioral objective for 2009)
# that need to be tested in 2009	82,000	(pop. X 40%)
Difference between '08 and '09	8,405	(2009 goal minus 2008 reality)

- Data shows that 25% of men in this age group tested at New Start vs. 75% at government clinics. (TRaC)
- Assuming this holds true, NS needs to test at least 2,101 more Men 25-35 in '09 than we did in '08 to achieve this target.
- Data also shows that 19.4% of these men tested with their partners (14,277).
- If we want to increase that to 22%, that would mean that 18,040 should test with their partners.
- So, we need 3,763 more men to test with their partners than in 2009.
- Assuming the 25/75 ratio as above, that means that we need to test 941 more men with their partners in '09 than we did in '08.

Note that these are examples of how two PSI platforms calculated their UoN estimates. They are not templates to be followed in every situation because no two countries will have access to the same amount or type of data.

1.2

ⓑ Total Market Approach

≫ **This involves understanding where PSI stands relative to other players who are active in the category.** For example, many southern African countries have large public sector free condom distribution programs and also private sector brands, such as Durex. What percent of market share does each sector, including the socially marketed sector, enjoy? How have those market shares changed over time?
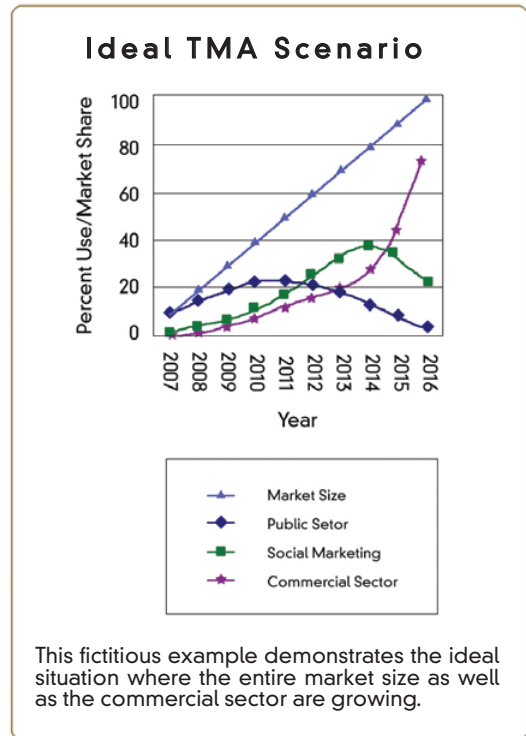
≫ **TMA usually has two main goals.**

• Increase the overall market size – This usually means increasing our sales by bringing new users into the market rather than trying to win market share from the commercial sector.

An exception to this could be if we persuade people who usually rely on free distribution from the public sector to purchase from the social market sector. This then helps ensure that the free products are going to the poorest of the poor, those who absolutely cannot pay for them.

It is important, however, that market growth does not happen at the expense of lower socio-economic status (SES) groups.

• Help grow the commercial sector – At the very least, this means not stealing market share from them, unless they are of an inferior and dangerous quality (e.g., poor quality condoms). Ideally, however, private sector market share would increase over time, leading to a more sustainable category in the long term – sustainable in the sense that it does not require donor subsidies.

Ideal TMA Scenario

This fictitious example demonstrates the ideal situation where the entire market size as well as the commercial sector are growing.

The implication here is that commercial products and services are not our competitors. Non use of the product or service in question is the competition.

Work with...

💬 your Regional Researcher to ensure that your TRaC is asking the right questions to monitor TMA. Sometimes this information can also be obtained from market research companies, such as A.C. Nielsen.

When conducting your situation analysis, be sure to keep a running list of things you don't know that you need and would like to know. Label this 'Information Gaps' and use it later to inform your Research Plan.

1.2

ⓒ Trial Versus Loyalty Strategy

» **In general, you have two behavioral strategies** to choose between: either to persuade…
- o new consumers to try your product or service (called a 'trial' or 'penetration' strategy); or
- o current consumers to consume more (called a 'loyalty' or 'usage' strategy).

The same idea applies to some behaviors, such as reducing concurrent sexual partners. You either want people to try it (trial) or to sustain it (loyalty).

» **Generally, it's easier and less expensive to get current users to use more** than to get people who have never tried a certain product/service/behavior to begin. An exception could be when you are dealing with a relatively new product or service and there is a lot of latent demand for it.

» **The criterion for this decision is health impact.** Where can we source the greatest amount of health impact via sales, client flow or the number of risk occasions covered? Put simply, are there are more people who have never tried the behavior or more people who only practice it inconsistently? If, for example, the contraceptive prevalence rate (CPR) is below 10%, then perhaps it's better to pursue a trial strategy. If CPR is high but so is the rate of discontinuation, then perhaps a loyalty strategy is better. Your Universe of Need calculations can help make these types of decisions.

» **This decision can also be related to decisions you take regarding segmentation.** What type of Segment did we choose to address? For example, if you've chosen to target Inconsistent Bed Net Users, then the strategy will be loyalty-driven. If you choose to address Non-intenders for modern contraception, the strategy will be trial-driven.

» **This decision will affect many of your subsequent marketing decisions.**

An example

| A TRIAL STRATEGY might…	A LOYALTY STRATEGY might…
‣ **Distribute free samples**	‣ **Increase direct-to-consumer communication via websites, improved packaging inserts, etc.**
‣ **Run discounted price promotions**	
‣ **Sell in packaging with a reduced number of units**	‣ **Sell in packaging with an increased number of units**
‣ **Emphasize visibility at point of sale**	‣ **Motivate consumers to advocate with friends or family**

Work with…

💬 your Regional Researcher to ensure that your TRaC is asking the right questions to understand the frequency distribution among your target for your promoted behavior. For example…

for HIV Counseling and Testing in a high HIV prevalence setting, you would want to know more than just whether or not the respondents had ever been tested. You might want to also know…

- how many times they have been tested, and
- when the last test was.

Where are we now?
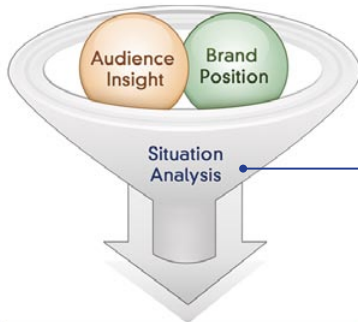
SITUATION ANALYSIS
Additional reading 3

Using SWOTS and Lessons Learned

In this additional reading we present things to consider when...

- creating a SWOT, and
- identifying lessons learned.

1.3

A SWOT exercise is useful for identifying strategic priorities, because it evaluates internal and external issues over which you do and do not have control.

Listing the lessons learned from previous marketing initiatives is also important.

Sometimes, these two exercises are done at the same time, but they do not have to be.

Some internal issues to consider (as Strengths or Weaknesses).

- Staff capacity and management
  E.g., quality of staff recruitment, training programs or performance management systems; quality assurance systems (especially for services).

- Resource availability and management
  E.g., quantity and quality of available resources, including budget, personnel, partnerships, time.

- Research – This can include...

  - gaps in understanding of the health problem, target group, market-place or anything else that may have affected the implementation of past strategies, and

  - primary research studies that can help us understand what has worked and not worked in the past. Sources for this can include FoQus, TRaC, MAP, any type of market research such as trade or health professional surveys, and even Management Information Systems.

Some external issues to consider (as Threats or Opportunities).

- **Political factors**
  E.g., government policies, key people in government who might oppose aspects of your program; donors who have an agenda or program restrictions.

- **Economic factors**
  E.g., inflation, rising unemployment, changing income levels, government trade policies.

- **Environmental/logistical factors**
  E.g., natural disasters, ethnic/political conflict, internal displacement, frequent power cuts.
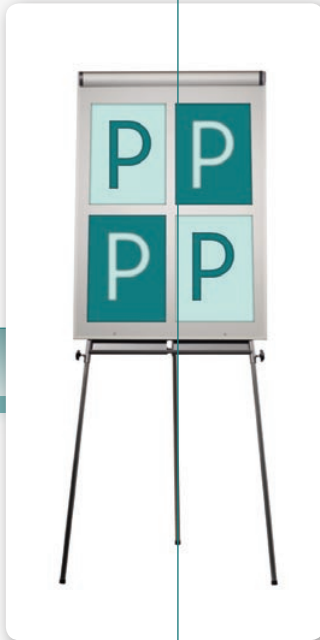
1.3

Lessons learned from previous implementation, such as...

Product P

Brand strategy
Positioning, personality & execution.

Product/service quality
Actual & perceived by target.

Packaging
Clearly communicates the category, brand and positioning/personality & offers the optimal number and size of units for the target group.

Product/service attributes
Valued by target, in line with positioning, addresses additional barriers among target.

Price P

Consumer considerations
E.g., low enough to be affordable but high enough to say quality; consistent with positioning?

Trade considerations
E.g., retailer adherence to recommended price; margin comparison to similar products/services.

Cost recovery considerations
E.g., progress towards reaching the desired level of cost recovery; possibilities to recover more costs while remaining affordable.

Marketplace considerations
E.g., comparison of annual price increases versus inflation or changes in consumer income levels; affect of past price increases on sales.

Place P

Consumer considerations
E.g., is the purchase decision planned or impulse and how does that affect the distribution strategy; how do target group preferences affect where and when the product/service is made available; is availability as wide as planned and why or why not?

Customer (i.e., 'Trade') considerations
E.g., is the product moving quickly enough through the distribution chain and at retail; is the product visible and presented neatly at retail; are you relying on commercial distribution as much as possible; is the sales force's incentive system in line with distribution objectives?

Promotion P

Brand strategy
E.g., are the elements of the brand onion communicated consistently and as often as reasonable?

Messages
E.g., is recall high enough, are messages understood?

Communication plan
E.g., is exposure high enough; are you trying to maximize reach by using several different channels at the same time; are the costs reasonable (in total and in per 1000 people reached); are special geographical or timing needs accommodated?

Where are we now?

Audience Insight | Brand Position

Situation Analysis

Marketing Objectives

Product | Price | Place | Promo

Research Plan

Work Plan & Budget

AUDIENCE INSIGHT

Summary

This chapter answers the following questions:

- What is audience insight and why is it important?
- What is an Audience Profile and how is it used?

We then explore a typical Audience Profile detailing the following elements:

- Name/nickname
- Summary
- Basic demographics
- Behaviour or Product/Service Use
- Key Monitoring Table Data
- Determinants of Behaviour
- Media habits
- Perceived benefits of and barriers to the promoted and current behaviours
- Psychographics
- Information Gaps

Where are we now?
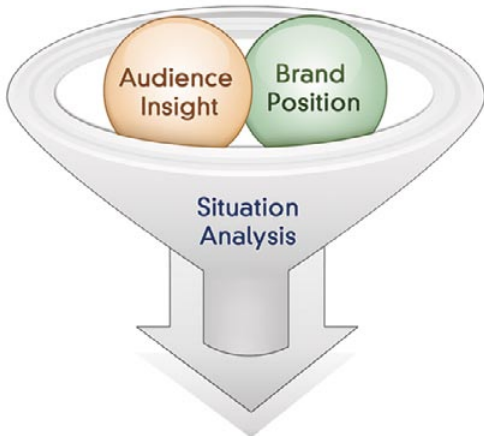
? What is audience insight?

Audience insight is knowing your target group so intimately that they become real people to you, and not just a jumble of demographic descriptors. For example, the target 'male clients of sex workers' becomes 'Tuan', whose fears, aspirations and interests are all well understood.

? Why is it important?

Only real audience insight can help us understand how we should position our product, service or behavior. It provides us with the emotional 'hook' upon which we will hang all our marketing.

- PSI primary research tools:
  - T RaC (quantitative)
  - FoQus (qualitative)
  - Willingness to Pay.

? What is an Audience Profile?

It's a tool we create – a summary of the most important information we have about the target group onto just 1 or 2 pages. It draws upon both **primary** and **secondary** research as well as qualitative and quantitative research. Organizational experience (e.g., through peer educators or IPC workers) with the target is equally relevant and should also be included.

- Secondary research:
  - Census
  - DHS or BSS
  - KAP studies
  - Media consumption studies.

NAME/NICKNAME

Naming the target (e.g, Tuan) is a simple but effective way to remind ourselves that they are real people. Giving them a nickname (e.g., Gã A Dua) can remind us of the most important insight about them which will drive our brand positioning.

```
Audience Profile: Tuan
```



```
Tuan
Ga A Dua

Summary:

Tuan is in his early 30s, employed, middle income, married,
and has a high school education.  He lives in an urban area
and goes to beer halls at least once a week.  Tuan likes to
socialize and drink with his friends in the evening, and
occasionally one of his friends will suggest they leave the bar
for 'Round Two', a phrase Tuan and his friends use for visiting
sex workers.  Tuan uses condoms with sex workers but not
consistently.  He looks for sex workers in different places and
likes the variety that sex work offers. He knows HIV is a risk
but does not feel at risk himself.  He often regrets visiting
sex workers afterwards but can't resist group pressure and the
fear of group rejection.

Demographics:                        (Source: PSI TRaC '08)
        Age: 29-35 (32) years old
        Education:  high school or university education
        Employed
        Average income 5 million VNDmonth
        Married.

    "G A Dua" is Vietnamese for a guy who goes along with the
group for fun.  He doesn't lead the fun, but he is an active
participant.
```

SUMMARY

While the audience profile is, in itself, a summary of all the key information about the target group, it is useful to make a summary of this summary so as to capture its overarching idea. Otherwise, it's easy for the Profile to degenerate into a laundry list of facts and numbers.

BASIC DEMOGRAPHICS

Age, gender, income and education levels are but a few of the more obvious demographics. It's often helpful to include an estimate of the size of the entire population group, which you should have from your Universe of Need calculations.

Audience Profile: Tuan

Behavior and Key Monitoring Data (Source: PSI TRaC '08)

- Has been to FSW between 1-3 times in the past 3 months
- Uses a condom with sex workers most of the time
- Is less likely to use a condom the more frequently he goes to FSW
- Unlikely to use condoms with other non-commercial partners
- Generally picks up FSW on the street (HCMC) or in hotels guesthouses (Hanoi)
- Usually does not plan to pick up FSW ahead of time
- Knowledge about HIV transmission is high
- Risk perception on HIV for himself is low

Determinants of Behavior (Visiting FSW frequently):(Source: PSI TRaC '08)

- Social norms: He believes it's normal for men to visit FSW and he thinks most of his friends and business partners visit FSW
- Self-efficacy: He is not confident that he can avoid going to FSW and doesn't think he has enough skills to refuse
- Locus of Control: He thinks the decision to go to FSW is out of his control when he's with his friends

Determinants of Condom Use: (Source: PSI TRaC '08)

- Beliefs: He thinks condoms often break during sex
- Beliefs: He believes using a condom makes sex unpleasant
- Intention: He is less likely to use a condom when in a hurry to have sex
- Beliefs: He doesn't think he can get HIV if he only has sex with an FSW once or twice

Media Habits:(Source: FoQus for Marketing Planning (MP)'08)

- He often goes to beer halls with his friends after work
- He likes surfing the internet

Perceived Barriers and Benefits of Visiting SW   (Source: FoQus on MP' 08)

Barriers to visiting FSW	• Fear of HIV • May affect his family • Costs a lot of money • May get caught by his wife
Benefits of visiting FSW	• Fun, new experience • Strengthens relationship with friends and business partners (and avoids losing them if he refuses to go) • Proves his strength and masculinity (Will not be seen as henpicked by his friends)

*FoQus on Marketing Planning used to be called FoQus on Concept Development.

KEY MONITORING TABLE DATA

It's often helpful to summarize data from the TRaC monitoring table. For example, knowledge is very high or threat is very low. Do not try to summarize data that does not provide a clear, unambiguous picture. Only include facts that apply to the overwhelming majority (or minority) of the target, such as 75% of them or more (or 25% or less).

DETERMINANTS OF BEHAVIOR

List all the determinants that have been identified through primary and secondary research, regardless of whether the organization has chosen to address them.

MEDIA HABITS

Any information about what media is consumed and when, where or how.

PERCEIVED BENIFITS OF & BARRIERS TO THE PROMOTED & CURRENT BEHAVIORS

As we will see in the Brand Positioning chapter, this information becomes very important when we choose our positioning strategy.

Note: Don't confuse an Audience Profile with a FoQus study's 'Archetype'. The latter is one of the outputs of a PSI qualitative FoQus study and can often be a large part of an Audience Profile. Ideally, however, the Profile would also draw from additional sources, such as TRaC or secondary studies.

Audience Profile: Tuan

Psychographics: (Source: FoQus on MP '08)

Drinking and social activity:
- Regular drinker
- Drinks with long-term friends, some of whom are regular visitors to FSW
- Decision to visit sex worker made after drinking and not planned

Group norms:
- Feels responsible for group fun level
- Believes visiting FSW is a normal part of socializing
- Feels a high level of pressure to stay with a group to the end (of the night)
- Alcohol helps him externalize the locus of control and give power to the group

Aspirations:
- He wants to be successful in his job and values technology

Values:
- He feels a responsibility to his family financially but not emotionally

Information Gaps About Tuan:
- How many Tuans are there in the seven cities in which we operate?
- How does he procure his condoms for commercial sex?
- Is it a planned or mpulse purchase?
- What proportion of Tuans...
  - Have been exposed to our communications?
  - Have received condoms from the PSI Promotions Team?

PSYCHOGRAPHICS

Such as the target's lifestyle, needs, fears, aspirations, values, interests, etc.

INFORMATION GAPS

During the exercise of creating an Audience Profile, it's important to ask yourself what you don't know that you need or would like to know. Later, this will help inform your research plan.

To learn more about Tuan and the FoQus study that helped inform Tuan's profile, go to:
http://kix.psi.org/download/attachments/12190047/FoQus+-+Clients+of+SW+-+Archetype+Tuan+-+FINAL.doc?version=1&modificationDate=1255688546215

How do we use an Audience Profile?

As one of the cornerstones of the DELTA process, the Audience Profile helps guide our marketing planning. For example, when making decisions about communication pieces or distribution strategies, we should continually refer to the Audience Profile. In the case of our above example, we will use the profile of Tuan to answer questions like:

- Would Tuan read this brochure?

- Where would Tuan want to buy a condom?

- How would Tuan react to the message in this poster?

- Which of Tuan's determinants of behaviour can we most effectively address?

Basing our decisions on a representative example from our target audience allows us to better define and focus our marketing strategies.

> An Audience Profile, or even just its summary paragraph, can be useful whenever you have to describe your target group in other documents, such as in creative briefs. Just copy and paste the summary paragraph or insert the whole Profile.

Characteristics of a good audience profile

- No two profiles will follow the same outline because the same data will not always be available for every group in every country.

- The best profiles include qualitative research as a source. The FoQus studies are PSI's approach to qualitative research and generate a wealth of in-depth audience insight.

- The profile should be a "living document", meaning it is regularly updated when new information becomes available.

Additional things you might include in your Profile...

- Estimates of the size of the target group can come directly from your Universe of Need calculations and can be included under the Demographics section.

- Daily routines can shed valuable light onto the target's lifestyle, helping inform all sorts of marketing decisions from brand positioning to media placement.

- "Openings" over the target's lifetime (or during his daily routine) when you might be more receptive to your marketing efforts.

- Whether a purchase decision is made in a planned or impulse manner can have significant implications for marketing planning.

  - A planned purchase means that the target deliberates about it and travels to the store specifically to make that purchase. This has Place P implications that are discussed later.

  - An impulse purchase means that the target decides to buy only after he is already in the store for something else and is somehow stimulated to do so. This can impact any of the P strategies, as is discussed later.

An example of openings

In Zambia, SFH's VCT program wants to attract couples but understands that the man in the relationship has more power and, thus, is the primary decision maker for the couples testing 'purchase decision'. The female, on the other hand, potentially faces more negative repercussions if she were found to be HIV+, such as violence or abandonment.

Importantly, though, SFH believes these power dynamics do change over time, presenting occasional 'openings' during which the promotion of couples testing might be easier. Specifically:

- In the beginning of the relationship, power is shared more equally

- After the birth of a child, the male may be more receptive to messages that involve fatherhood and the female, if she tested negative at the antenatal clinic, may be more empowered to broach the subject.

> In order to help your team internalize who your target audience is, try posting the Profile on the wall in the office.

Where are we now?

POSITIONING & BRAND STRATEGY

Summary

This chapter answers the following questions:

- What is a brand?
- What is a brand strategy?

We introduce the concept of the Brand Onion and then explore its levels.

Level 1 - Brand Positioning
- What is it?
- How do I write a positioning statement?
- The characteristics of a good positioning statement.

The remaining levels of the Brand Onion are explored.

Level 2 - Brand Personality
- What is it?
- Characteristics of a good Brand Personality
- How to choose a Brand Personality

Level 3 - Brand Execution
- What is it?
- How to manage your brand execution.

Where are we now?

What is a brand?

A brand can be defined as a summation of everything your target knows and feels about your product or service. This includes knowledge and emotions that results from things like using the product or service, being exposed to it via advertisements, or even recommendations from friends.

This means it is an intangible object, something that lives in the hearts and minds of your target group and not on a shelf in the store. Since so many things can influence one's perception of a brand, managing it can be tricky. PSI uses Positioning Statements and Brand Onions to record our brand strategy and help manage it over time.

What is positioning?

It is the core of brand strategy and the first marketing decision you will make. It identifies the most compelling and unique benefit that your product/ service/ behavior stands for in the mind of the target group. Think of this as the emotional "hook" upon which you will hang the rest of your marketing. Take, for example, this positioning statement from PSI Cambodia.

Sometimes...

… PSI brands a behavior that is not related to a product or service, such as PSI Nigeria/ SFH's "Zip It" abstinence brand.

… PSI promotes a category, in general, such as using bed nets, instead of promoting its own net. Such campaigns are sometimes branded and sometimes not.

Example

Positioning Statement for PSI Cambodia's Number One condom:
Rithy uses the premium-quality condom Number One when he wants to impress his partner.

The target group as identified in the Audience Profile   The emotional benefit or "hook" that will drive all the marketing.

As an internal alignment tool, some platforms hang their Brand Onions on the walls of their marketing offices.

What is a brand strategy?

Represented by the Brand Onion graphic, it includes the concepts of brand positioning, personality and execution.

Disciplined adherence to your brand strategy helps ensure that you will you will have strong brand equity with your consumers - in other words, that your brand will represent what you want it to in the minds and hearts of your target group.

THE BRAND ONION

Brand Execution — LEVEL 3 — Tangible brand elements that the target experiences, such as logos, colors, symbols, etc.

Brand Personality — LEVEL 2 — Strategic statement of 2-4 adjectives that help shape the tone of voice for all brand communications

Brand Position — LEVEL 1 — Strategic statement that Identifies the most compelling and unique benefit for the target

Example

BRAND EXECUTION

Tangible brand elements that the target experiences.

- Color
- Logo
- Shape
- Scent
- Language
- Sound
- Symbol
- Tag line
- Font
- Touch/feel
- Patterns
- Music

BRAND PERSONALITY

Strategic statement of 2-4 adjectives that help shape the tone of voice for all brand communications. Describe your brand as if it were a person.

BRAND POSITION

Strategic statement that Identifies the most compelling and unique benefit for the target. It should contain the following components:

- Target
- Frame of Reference
- Point of Difference
  - Emotional
  - Functional
    (optional)

Number One condoms (PSI Cambodia)

Brand Execution

Brand Personality
Successful & Classy

Brand Position
Rithy uses the premium-quality condom Number One when he wants to impress his partner.

BRAND ONION:

Note how all the strategic brand elements hang together and speak to the positioning. Because the brand is positioned to impress one's partner, the personality is successful and classy. Because of this personality, the brand execution uses a logo that looks upscale and trendy.

LEVEL 1
What is Brand Positioning?

- A positioning statement is one sentence that captures what the brand stands for in the mind of the consumer. It defines the target audience, the frame of reference (i.e., competition), and the core benefit of the brand that makes it singularly unique.

- A positioning statement is not a slogan or a tag-line; the consumer will never see it. Instead, it is an internal tool to guide marketing strategy and execution. It should be void of jargon or complex terms.

- Positioning is the most important strategic decision that a marketer can make for the following reasons:

  - It precedes and guides all other marketing decisions;
  - It gives continuity and cohesion to the brand's marketing activities;
  - It provides an objective basis against which to evaluate all marketing ideas; <u>every element of the marketing mix should support the brand's positioning.</u>

- Because positioning is expressed through the brand personality and brand execution, it should be reflected through every communication piece the target sees, such as TV ads, packaging, and even IPC workers.

- A brand position is a long term proposition. It cannot be changed easily or quickly. In fact, established brands are already positioned in the consumer's mind. That is, the target already associates certain benefits (and/ or costs) with the brand. Crafting a positioning statement for an established brand requires gaining an in-depth understanding of existing perceptions.

Example

Imagine that a fictional condom brand called Good Times offers the emotional benefit of making safer sex fun. "Fun" could then be expressed through each of the marketing Ps in the following manner...

MARKETING "P"	STRATEGY: TO CONVEY "FUN"
Product	▶ Offers textured and flavored condoms as well as a line of flavored lubricants. ▶ Packaging shows couples having fun rather than being romantic or erotic. ▶ Insert conveys health information in a fun and casual tone of voice.
Place	▶ Available in bars and discos as well as traditional outlets.
Promotion	▶ Advertising and below the line promotions are humorous and relevant to youth.
Price	▶ (The "fun" PoD is not as relevant to this P, though the price should be appropriate considering the target group as outlined in the audience profile.)

Brand Position

LEVEL 1
How do I write a positioning statement? Continued...

The positioning statement has three parts.

1 Target Audience

A robust and intimate understanding of the target group is essential. This should already be captured in your audience profile.

2 Frame of Reference (FoR)

The frame of reference is another term for category or competition; it defines what would substitute for your brand.

The broader your FoR, the more other things you are allowing in the target group's consideration set when evaluating whether or not to choose your brand.

For example, the FoR for a condom could be...

For example

FRAME OF REFERENCE	EXAMPLE OF WHY IT MIGHT BE USED
All other HIV prevention methods	To position condom use as the one HIV prevention method that provides something the other methods do not, e.g., to still 'have fun', though responsibly.
All other condom brands	To position this brand as one that promises something the other brands do not, e.g., confidence that it will never break.
Only high quality condom brands	To position this brand as one that promises something other high quality brands do not, e.g., high quality but at an affordable price.

3 Point of Differentiation (PoD)

This is the core benefit that the brand offers. It should be...

- Compelling to the target
- Best delivered by your brand versus others that are in the FoR

Hence, the term 'point of differentiation'

There are two types of PoDs: functional and emotional.

A. Functional PoDs

Functional PoDs are benefits derived from product or service features. A feature is something the product or service has or does. For example, the iPod has the functional PoD of being the easiest to use portable music player.

B. Emotional PoDs

Emotional PoDs fill emotional needs that the consumer has. Sometimes – but not always - this will spring directly from the functional PoD. Continuing the iPod example, its ease of use gives the consumer freedom because he can listen to any of his music anywhere and anytime he wants.

⚠ WARNING!

- ▶ Every positioning statement should include an emotional PoD.
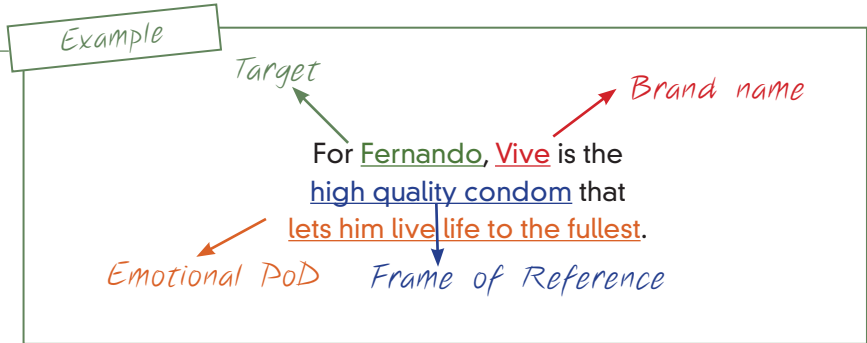- ▶ The fewer PoDs the better. Try for just one or two.

Brand Position

LEVEL 1
How do I write a positioning statement? Continued...

It's helpful to summarize your positioning into a short sentence. This makes it easy for your team to internalize it and, thus, make marketing decisions that are aligned with it. One possible format for this statement follows below.

For (target), (brand name) is the (frame of reference) that is (emotional / functional PoD).

Consider this example from PSI Central America/PASMO

Example

Target   *Brand name*

For <u>Fernando</u>, <u>Vive</u> is the <u>high quality condom</u> that <u>lets him live life to the fullest</u>.

Emotional PoD   *Frame of Reference*

Of course, the exact format of the summary sentence is not as important as the fact that all the elements are contained within it.

Characteristics of a good positioning statement

A. Your positioning should stem directly from an important piece of audience insight.

Example

AUDIENCE INSIGHT	THE RESULTING POSITIONING STATEMENT	
In Swaziland, being a 'real man' is defined by the success one achieves in life – of which personal popularity and wealth are but two measures. Unfortunately, though, the economic situation there is such that it's very difficult for Ndoda to become wealthy.	For Ndoda, Male Circumcision is the HIV prevention method that <u>makes women want to be with him and men to be like him.</u>	Emotional PoD
Thabo knows there is a lot of HIV in Lesotho, but does not want to believe he will get it. Not knowing his status makes him anxious every time he feels ill, but he's even more afraid of the stigma and isolation associated with being HIV+. For these reasons he has never gone for an HIV test.	For Thabo and his partner, New Start is the <u>confidential and friendly</u> HIV testing service that lets them <u>choose a better life, free from fear.</u>	Functional PoDs / Emotional PoD
Aisha is a young Guinean woman full of aspirations but who hasn't finished school yet. Aisha is aware that unwanted pregnancies could prevent her to fulfil her aspirations, but yet she doesn't use any modern contraceptive method. She believes that using a family planning method now could cause problems and limit her ability to fall pregnant.	For Aisha, Planyl is the oral contraceptive that will <u>give her time to fulfill her aspirations and become a good mother whenever she wants.</u>	Emotional PoDs

LEVEL 1
How do I write a positioning statement? Continued...

Brand Position

Characteristics of a good positioning statement, continued...

B. The PoD(s) chosen should be defensible over the long term.

In other words, in the future no other brands should be able to enter the market and try to claim the same PoD.

For example

… a bed net that tries to position itself as the only conical shaped net on the market could find that one day other nets also offer conical shapes. In this case, the brand would be better off treating its conical shape as a feature that may or may not be promoted in a given communication piece.

As we will discuss in the Promotion P chapter, it is actually better to promote benefits than features. For example, here the benefit of a conical shaped bed net could be how easy it is to hang.

C. Every positioning statement should have an emotional PoD.

Because many of the products PSI sells are essentially commodities, (e.g., condoms, bed nets, etc.), it is often difficult to identify a functional PoD that will be defensible over the long term. Instead, being the first in your category to claim a specific emotional benefit is much easier to defend over the long term.

For example

… a bed net brand could be positioned to the head of the household as something that proves he is fulfilling his role as protector and provider of his family.

D. The best PoDs are more specific than general.

The less specific they are, the easier it becomes for marketing decisions to eventually stray off the intended positioning. This makes it more difficult to create a distinct impression in the mind and hearts of the target group.

Example

BRAND	SPECIFIC POD	ALTERNATIVE POD
Crest toothpaste	Professional quality dental care in your home	Superior dental care
Number One condom	Impresses your partner	Is a status symbol
Male Circumcision	Makes women want to be with you and men to be like you	Makes you popular

Brand Position

LEVEL 1
How do I write a positioning statement? Continued...

Characteristics of a good positioning statement, continued...

E. PoDs are, by definition, unique.

In other words, the target should believe that only your brand best delivers that benefit. For this reason, you must understand what benefits and barriers the target associates with all the other options within that frame of reference. You can record this information in the Audience Profile.

Consider the example below from the Maria/Certeza example in the introduction to this toolkit. The FoR is "all methods of water treatment", which in Angola primarily meant boiling water or using chlorine. "Doing nothing" is also included as an option because of Maria's busy lifestyle (and, indeed, it was her most frequently used option at this time).

	BOILING WATER	USING CHLORINE	DOING NOTHING	CERTEZA
BENEFITS	- Is effective	- Is effective - Very inexpensive	- Is often the only option due to hectic work / family schedules	- Affordable price (though not as low as chlorine) - Easy to use - Pleasant tasting result
BARRIERS	- Takes time for water to boil and then cool down - Results in unpleasant taste	- Very difficult to get correct dosage - Incorrect dosage results in unpleasant taste	- Family, especially children, at risk	

With this type of analysis, it was easy for the marketer to understand that Certeza's unique functional PoDs could be its ease of use and the resulting pleasant taste. This analysis, combined with insight into Maria's life, also helped point to the emotional PoD of helping her be a good mother.

F. Good positioning demands sacrifice.

For some marketers, it is tempting to want to be all things to all people in the hopes that this will maximize sales. The more likely result, however, of having too many PoDs is that none will stand out in the mind of the consumer.

First Draft of Positioning Statement

For the woman who wants to protect* her family and keep her children healthy*, Certeza is the most accessible safe drinking water solution because it is low-cost, simple to use and gives you control* over the water your family drinks.

*Functional PoDs

Final Positioning Statement

Certeza is the simplest* water treatment method that leaves your water tasting pleasant* and makes it easier to be a good mother**.

*Functional PoDs   **Emotional PoDs

- The original statement had at least five functional PoDs and no emotional PoD.

- The final statement had two functional PoDs and one emotional PoD.

Brand Personality

LEVEL 2
What is Brand Personality?

Expressed in two to four adjectives, the brand personality shapes the tone of voice for all brand communications, such as advertisements, packaging, the brand name, IPC agents, etc.

More specifically, it helps guide decisions around design elements such as colors and images. It can even influence the types of words that are used or the content of an advertisement.

In this way, brand personality can be thought of as the bridge between the positioning and the execution.

Take, for example, these two fictional condom brands.

Emotional PoD:	Fun	Sense of Security
Personality:	Upbeat & positive	Mature & hardworking
Effect on Brand Execution:	• Bright, lively colors • Adverts that make you smile	• Somber, serious colors • Adverts that emphasize protection

Characteristics of a good Brand Personality

• It should be true to the positioning, particularly the emotional PoD.

For example

BRAND	POSITIONING	PERSONALITY
Mc Donald's	Fast, affordable and fun dining for the family	Friendly and upbeat
OK Condoms (PSI Cambodia)	The smartest choice because it offers the best value for money	Hard working, reliable
Vive condoms (PSI Central America/ PASMO	Lets target life live to the fullest	Energetic & adventurous Positive & upbeat

• The personality should be unique within its FoR, just like its corresponding PoD(s). In other words, if an existing brand in the same category is already known as the "compassionate and caring friend", then you should not try to also claim this personality. Odds are that if someone else has beat you to the idea, they already "own" it in the hearts and minds of the target group.

• Most of the times, the personality should be singularly focused. Remember, less is more and a good brand strategy requires sacrifice. However, there might be times when your brand will need to contain more than one dimension. Consider this example from PSI Cambodia's campaign targeted to male clients of sex workers.

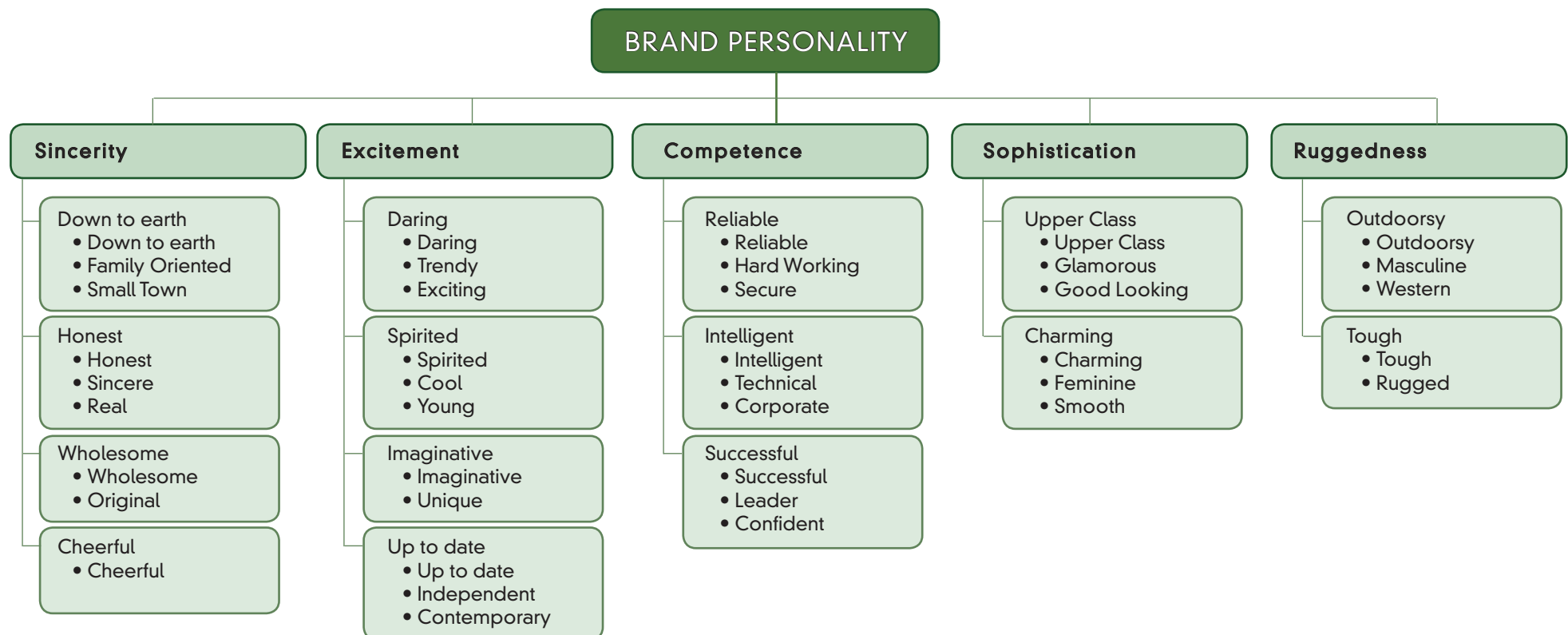| Positioning for Using Condoms in General	Brand Personality
Using condoms to prevent HIV makes Rithy a real Khmer man because it lets him be responsible and enjoy himself.	Responsible and well respected but also Fun and sociable.

Brand Personality

LEVEL 2
How To Choose a Brand Personality?

Bearing in mind the brand's positioning, ask yourself what would happen if your brand suddenly came alive and walked into the room.

? What type of person would s/he be?

? What would s/he say and do?

? How would s/he say and do it?

The following brand personalities were found to exist in the US through research. This not meant to be a menu from which you will choose your brand personality, but, rather, to inspire you by what other brands have used in the past.
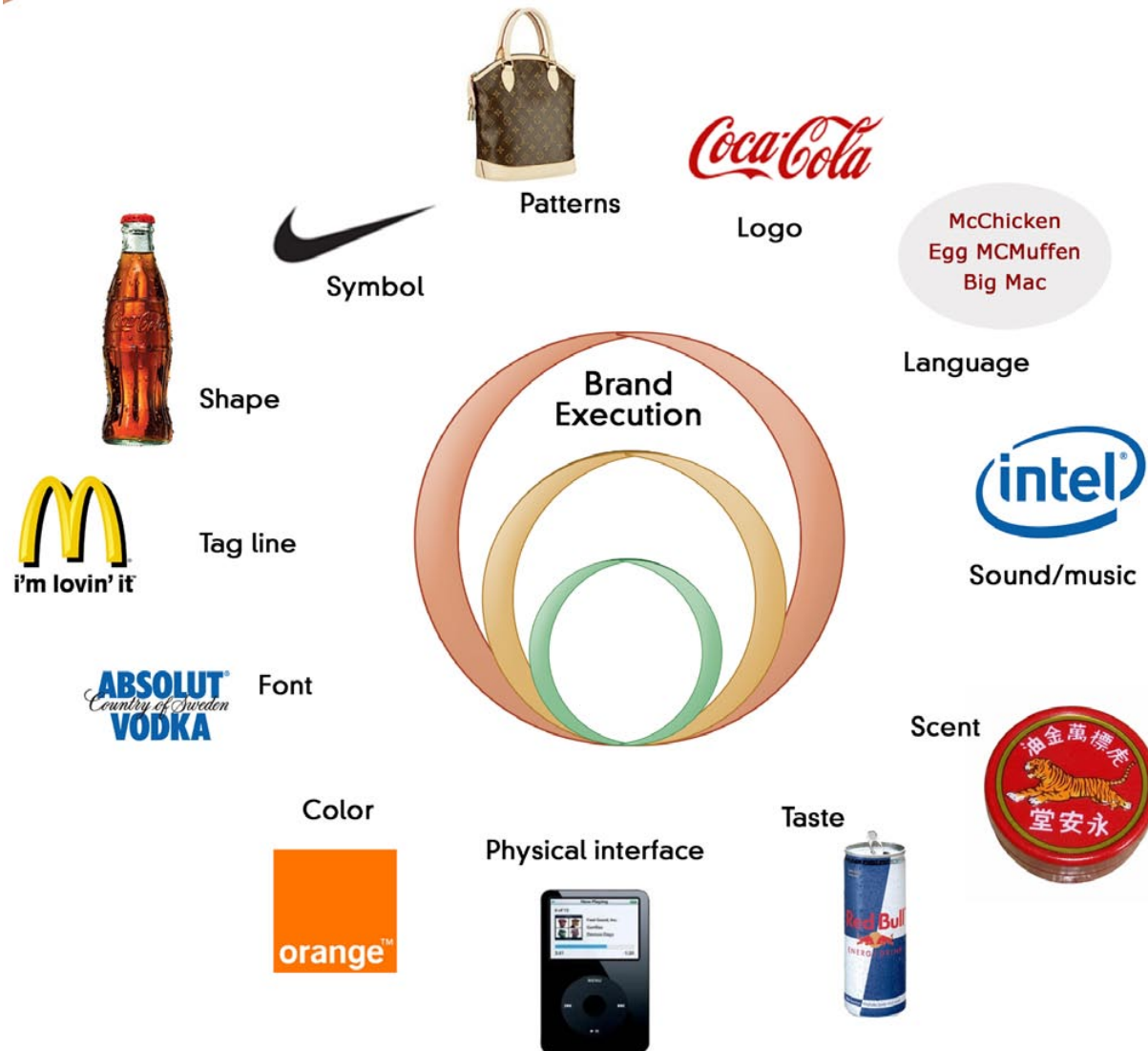
BRAND PERSONALITY

Sincerity

Down to earth
- Down to earth
- Family Oriented
- Small Town

Honest
- Honest
- Sincere
- Real

Wholesome
- Wholesome
- Original

Cheerful
- Cheerful

Excitement

Daring
- Daring
- Trendy
- Exciting

Spirited
- Spirited
- Cool
- Young

Imaginative
- Imaginative
- Unique

Up to date
- Up to date
- Independent
- Contemporary

Competence

Reliable
- Reliable
- Hard Working
- Secure

Intelligent
- Intelligent
- Technical
- Corporate

Successful
- Successful
- Leader
- Confident

Sophistication

Upper Class
- Upper Class
- Glamorous
- Good Looking

Charming
- Charming
- Feminine
- Smooth

Ruggedness

Outdoorsy
- Outdoorsy
- Masculine
- Western

Tough
- Tough
- Rugged

Aaker, Jennifer L. (1977) Dimensions of Brand Personality Journal of Marketing Research Vol.XXXIV (August 1997)

Brand Execution

LEVEL 3
What is Brand Execution?

These are the tangible "executional" elements that a brand can own in the mind and hearts of the target. This includes, but is not limited to things like…

Patterns

Logo

Coca-Cola

McChicken
Egg MCMuffen
Big Mac

Language

Symbol

Shape

Brand Execution

(intel)

Sound/music

Tag line

i'm lovin' it

Font

ABSOLUT
Country of Sweden
VODKA

Scent

Color

Physical interface

Taste

orange

TEST

1. Take a colored marker and draw Coca Cola.

• What color did you choose? Red?
• What did you draw? The bottle? The logo in its signature font? Did you include the wave beneath the brand name?

These are examples of "executional brand elements" that Coca Cola owns in the minds of many of its consumers. They own them because they consistently use them year after year – the same shade of red, the same logo and font.

2. Ask someone from your target group to "draw your brand". What would they draw? Does your brand "own" any specific elements that consumers would automatically associate with it?

Brand Execution

LEVEL 3
How to manage your brand execution?

Choose just a few elements that you believe you can "own" in the minds and hearts of the target group. You don't need an element for every category listed above, two to five are plenty.

► Choose elements that complement your brand positioning and personality. At the very least, they should not be incompatible with it.

► Manage the consistent application of these elements through a brand ID book or style guide.

Below is a page from an old Love Plus I.D. book from PSI Romania.
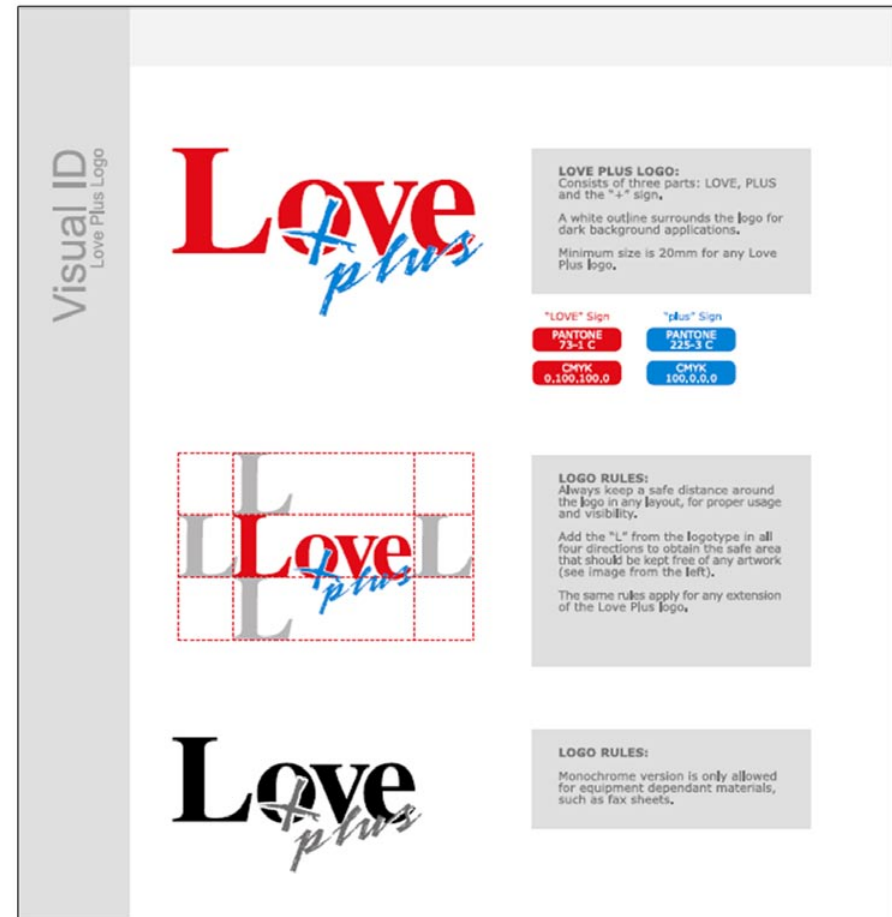
These are documents that most advertising agencies can make for you that exactly specify things like…

- A logo's appearance on different colored backgrounds
- A logo's appearance on different items such as promotional t-shirts or packaging
- Packaging and product specifications
- The pantone colors that a printer would use to match your colors, etc.

► If your brand is a service, consider how the staff and the physical space can also be aligned with your brand positioning and personality.

For example

PSI Lesotho's New Start CT clinics promise their clients a life free from fear. In order to help deliver this, they changed the layout of their waiting rooms, eliminating the rows of classroom seating and removing the scary STI posters.

Visual ID
Love Plus Logo

Love plus

LOVE PLUS LOGO:
Consists of three parts: LOVE, PLUS and the "+" sign.

A white outline surrounds the logo for dark background applications.

Minimum size is 20mm for any Love Plus logo.

"LOVE" Sign	"plus" Sign
PANTONE 73-1 C	PANTONE 225-3 C
CMYK 0,100,100,0	CMYK 100,0,0,0

Love plus

LOGO RULES:
Always keep a safe distance around the logo in any layout, for proper usage and visibility.

Add the "L" from the logotype in all four directions to obtain the safe area that should be kept free of any artwork (see image from the left).

The same rules apply for any extension of the Love Plus logo.

Love plus

LOGO RULES:
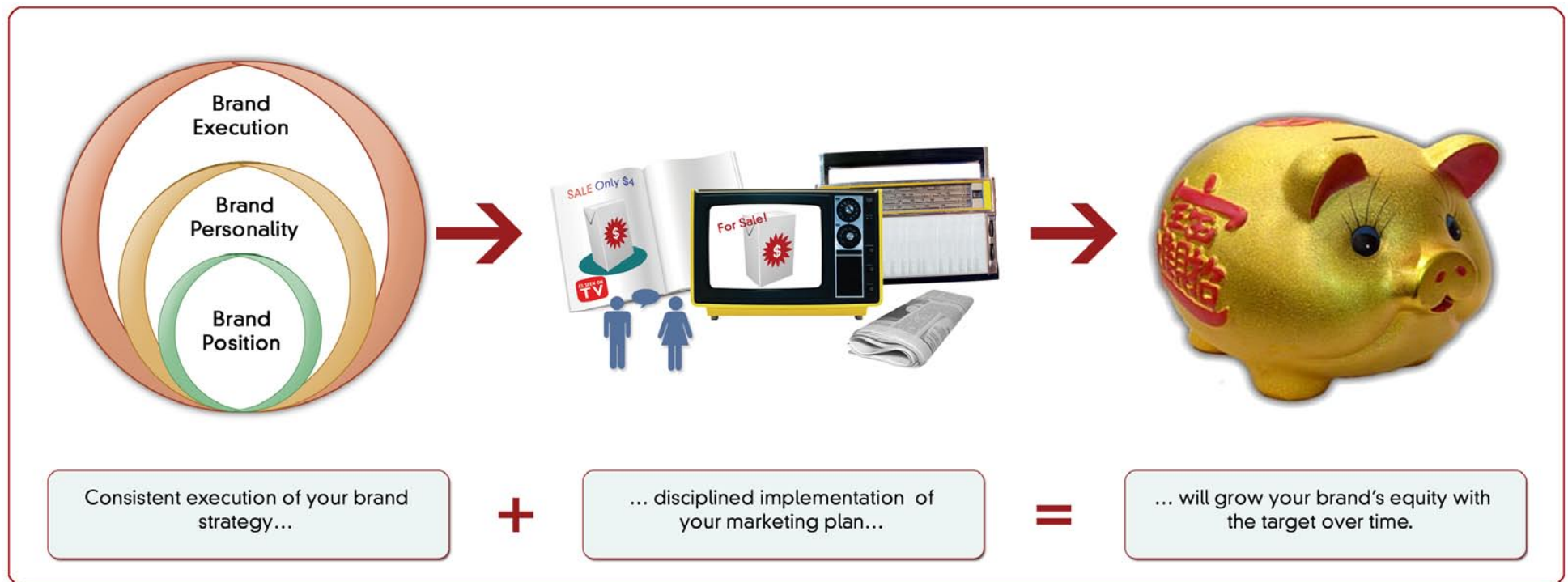Monochrome version is only allowed for equipment dependant materials, such as fax sheets.

In closing…

Disciplined and consistent implementation of your brand strategy – that is, brand positioning, personality and execution – will help increase your brand equity among your target group. In other words, it will increase the likelihood of your brand representing what you want it to in the minds and hearts of your target group.

Think of your brand as having a 'brand equity piggy bank'.

• Each communication piece you publish that is "on strategy" – that speaks to the brand positioning and personality and incorporates the brand's executional elements – is a deposit in this piggy bank.

• Each communication piece you publish that is not on strategy does not add to the piggy bank.

• Overtime, the more you stay on strategy, the more equity you will build in your brand equity piggy bank, and the richer your brand becomes!

MARKETING PLAN OBJECTIVES

Where are we now?

Summary

Marketing Plan (MP) objectives specify what you hope to achieve with the marketing plan. There are four types of MP objectives at PSI.

1. BEHAVIOR OBJECTIVES

2. DETERMINANT OBJECTIVES

   A. Science Considerations
      • Choose only starred items
      • Examine the Odds Ratios
      • Know what the Determinant is measuring.

   B. Art Considerations
      • Look for the 'story' behind the numbers
      • Consider each determinant's potential for change
      • Think carefully about how factors influence each other
      • Examine secondary research
      • Consider the resources that are available
      • Weigh external factors.

Where are we now?

MARKETING PLAN OBJECTIVES

Summary (cont.)

3. SALES & CLIENT FLOW TARGETS

4. MAP INDICATORS FOR COVERAGE & ACCESS

    A. Coverage
- Step 1: Set the minimum standard
- Step 2: Set benchmarks.

    B. Access
- Choose the hot zone
- Determine size of the target group
- Map the hot zone
- Decide on your catchment area size
- Establish the current level of access
- Set the desired level of access.

Where are we now?

How do Marketing Plan Objectives relate to logframe indicators?

▷ Every project at PSI should have a logframe that covers the entire duration of the project period, such as five years. These are often written at the project proposal stage.

▷ A marketing plan, however, will cover a shorter period, usually one year.

▷ You can think of the process of setting objectives for a MP as chopping up the broad focus of the project logframe into immediate and manageable activities and desired outcomes.

▷ This means that there will likely be several MP's written to cover the period of one logframe.

Marketing Plan (MP) objectives specify what you hope to achieve with the marketing plan.

• They are written in 'SMART' fashion. That is, they are measurable and time-bound.

• Their time period will coincide with when they are able to be measured and not necessarily the duration of the MP. For example, a behavior change goal would be measured by a TRaC study which might be once every two years whereas a sales goal would be measured on an annual basis.

• There are four types of MP objectives at PSI:

❶ BEHAVIOR

– E.g., Significantly increase consistent condom use with regular partners from 35% by end 2010.

❷ DETERMINANT

– E.g., Significantly increase reported self efficacy to negotiate condom use with a regular partner from a mean of 2.2 by end 2010.

❸ PRODUCT SALES OR SERVICE CLIENT FLOW

– E.g., Distribute 1,000,000 bed nets.
– E.g., 25,000 individuals receive HIV counseling and testing by end 2010.

❹ MAP INDICATORS FOR COVERAGE AND ACCESS

– E.g., By end 2010, at least 50% of target areas will have more than 2 outlets with the PSI condom available (a coverage objective) and more than 65% of Injecting Drug Users are located within a 300-meter radius of outlets selling PSI condoms (an access objective).

> Depending on the project, you may or may not have these types of objective.

How do Marketing Objectives relate to Strategic Priorities?

As big picture issues that the plan should address, Strategic Priorities will link to many of your marketing objectives. Often, however, there will be some objectives that do not relate to any strategic priorities. Consider this example from PSI Cambodia's Reproductive Health MP.

Example... *of when Strategic Priorities link with Marketing Objectives*

STRATEGIC PRIORITY	MARKETING OBJECTIVE
Increase access to & quality of Long Term Methods in Rural Areas	Significantly improve the mean score for Quality of Care from 2.7 by end 2010
	Significantly increase % of rural married women of reproductive age using a modern contraceptive method from 26.5% in 2005 to 42.5% by 2010.

Example... *of when the 2 do not link together*

MARKETING OBJECTIVE
Significantly increase the mean score of Beliefs from 2.9 by end 2010.

This objective is very narrow in its scope. There were specific false beliefs about contraception that needed to be corrected. As such, it did not have a direct corollary to any of the Strategic Priorities but was, nonetheless, an essential objective to include in the plan.

In addition, it is very possible that when choosing your marketing objectives you might revisit and revise your strategic priorities. After all, marketing planning is not a strictly linear process, but more of a fluid circular process.

The four types of MP objectives:

1 Behavior

2 Determinant

3 Product sales or service client flow

4 MAP Indicators for Coverage and Access

1 BEHAVIOR

Even though it will sometimes not be possible to measure changes in behavior during the short time frame of a marketing plan, every marketing plan should nonetheless have a behavioral objective.

Example...

Significantly increase consistent condom use with regular partners from 35% by end 2010.

2 DETERMINANT OBJECTIVES

The following describes one method for choosing priority determinants based upon TRaC results. The fewer determinants you choose, the better because it will allow you to focus your energy and better leverage your resources.

This process involves both 'SCIENCE' and 'ART'. This means that some of the guidelines are definitive rules that must always be followed (the science) whereas other guidelines are applied more subjectively (the art).

Let's first look at the 'SCIENCE' of choosing determinants...

SCIENCE 1: Choose only starred items

- Only those items that have stars in the segmentation table should be considered. This indicates they are different to a statistically significant degree between the 'behavers' and 'non-behavers'.
- Treat an item with one star the same as an item with two or three. The number of stars a given item has does not matter for this decision making – only that there is at least one star.

SCIENCE 2: Examine the Odds Ratios (OR)

- Focus only on items with an OR greater than one. Those items with an OR less than one will either not help to change the behavior or possibly change it in the wrong direction.

- Note: This rule assumes that the indicator is phrased in the way you want your target group to believe, e.g., "only mosquitoes can transmit malaria" and not "mosquitoes are just one way you can get malaria." If this is not the case and if the indicator has not been reverse coded by the researcher, then you should consider OR's that are less than one.

- The higher the OR, the more likely it is that changing the item could lead to behavior change. Thus items with higher OR's are generally better to prioritize.

SCIENCE 3: Know what the Determinant is measuring

Be sure to understand what questions make up a given determinant . Sometimes, we may have our own understanding of a determinant, which, in turn, might lead us to prioritize it based upon a false impression.

For example, you might assume 'Beliefs' refers to prevention when it actually refers to transmission.

Segmentation Table OAM and Population Characteristic determinants of Ownership of LLINs
Population at Risk: Rural inhabitants of malaria endemic areas
Behaviour: Slept under net the previous night

INDICATORS	Users N=375	Non-Users N=656	Sig.	Odds Ratio
	% or mean out of 4			
OPPORTUNITY				
Product Attributes – nets comfortable	2.43	2.01	*	1.65
ABILITY				
Knowledge - malaria symptoms (average score out of 10)	7.43	7.82	**	0.72
Knowledge - malaria transmission (average score out of 9)	8.12	8.02	**	1.30
Knowledge – malaria treatment (average score out of 5)	4.52	4.72	**	0.86
Beliefs – beliefs regarding transmission - Only mosquitoes can transmit malaria. - I am not at risk of malaria from drinking dirty water. - If I am not bitten by a mosquito, I will not be at risk of malaria. - I do not have to worry about malaria if I get caught in the rain.	2.85	2.57	***	1.80

2 DETERMINANT OBJECTIVES, continued…

The 'ART' of choosing determinants

ART 1 In general, remember you are looking for the 'story' behind the numbers.

The TRaC tables are trying to tell you something; they are describing the current situation that exists with your target group/behavior. Refer to the information presented in both the Segmentation and Monitoring Tables to discern the story.

For example Monitoring Table

THE STORY	SUPPORT FOR THE STORY	
People correctly understand that malaria is a very serious disease and correctly feel at risk for getting it.	Monitoring table scores are high for both aspects of Threat – Severity and Susceptibility.	①
People understand that sleeping under a bed net can help prevent malaria.	Monitoring table scores are high for Knowledge of malaria transmission and for the Outcome Expectation of nets preventing malaria.	② ③
However, people also believe that other things can transmit malaria, such as being caught in the rain when it is sunny.	The segmentation table significantly correlates False Beliefs about malaria transmission with sleeping under a bed net.	
In addition, people think bed nets are uncomfortable to sleep under.	The monitoring table's Product Attributes score shows that people think nets are uncomfortable and the segmentation table significantly correlates this with bed net use.	④
Therefore, people do not regularly sleep under bed nets or intend to do so regularly. In other words, why would they bother if there are other ways in which they can catch malaria?	The monitoring table shows that bed net use is low and that intention to use in the future is also low. The segmentation table significantly correlates Intention with bed net use.	⑤ ⑥

Monitoring Table: Behavioral indicators and determinants in all provinces
Population at Risk: Rural inhabitants of malaria endemic areas

INDICATORS	June 2007 N=1186
BEHAVIOR	% or mean
% households owning at least one net	55.7%
% general population slept under a net the preceding night ^	30.3%
% Under 5's slept under a net the preceding night *	36.5%
% Pregnant woman slept under a net the preceding night	44.2%
OPPORTUNITY	
Perceived availability of mosquito nets	2.23
Product attributes: nets comfortable	2.16
Product attributes: convenience	2.80
ABILITY	
Knowledge - malaria symptoms (average score out of 10)	7.68
Knowledge - malaria transmission (average score out of 9)	8.06
Knowledge – malaria treatment (average score out of 5)	4.65
Beliefs – beliefs regarding transmission - Only mosquitoes can transmit malaria. - I do not have to worry about malaria if I get caught in the rain.	2.67
MOTIVATION	
Intention to use nets - I intend to sleep under a net, regardless if it is the dry or wet season	2.73
Subjective norms about use of nets - I think people in my community would approve of using a net	2.99
Locus of control	
– I can control whether or not I get malaria	2.76
Perceived general severity of malaria	
- of malaria in general	3.19
- of malaria during pregnancy	3.03
Perceived susceptibility to malaria	
- for pregnant women	3.02
- for children under 5	3.09
Outcome expectation	
- of preventing malaria	2.70
- of saving money on treatment	2.99
Agree that nets are affordable	82.5%

2 DETERMINANT OBJECTIVES, continued...

ART 1 .... looking for the 'story' behind the numbers, continued...

Refer to the information presented in both the Segmentation and Monitoring Tables to discern the story.

For example | Segmentation Table

THE STORY	SUPPORT FOR THE STORY
People correctly understand that malaria is a very serious disease and correctly feel at risk for getting it.	Monitoring table scores are high for both aspects of Threat – Severity and Susceptibility.
People understand that sleeping under a bed net can help prevent malaria.	Monitoring table scores are high for Knowledge of malaria transmission and for the Outcome Expectation of nets preventing malaria.
However, people also believe that other things can transmit malaria, such as being caught in the rain when it is sunny.	The segmentation table significantly correlates False Beliefs about malaria transmission with sleeping under a bed net. ⑦
In addition, people think bed nets are uncomfortable to sleep under.	The monitoring table's Product Attributes score shows that people think nets are uncomfortable and the segmentation table significantly correlates this with bed net use. ⑧
Therefore, people do not regularly sleep under bed nets or intend to do so regularly. In other words, why would they bother if there are other ways in which they can catch malaria?	The monitoring table shows that bed net use is low and that intention to use in the future is also low. The segmentation table significantly correlates Intention with bed net use. ⑨

Segmentation Table OAM and Population Characteristic determinants of Ownership of LLIN's
Population at Risk: Households in malaria endemic areas
Behavior: All members of households who slept under net the previous night

INDICATORS	Users N=375	Non-Users N=656	Odds Ratio	Sig.	
OPPORTUNITY	% or mean out of 4				
Product Attributes – nets comfortable	2.43	2.01	1.65	*	⑧
ABILITY					
Knowledge - malaria symptoms (average score out of 10)	7.43	7.82	0.72	**	
Self Efficacy	3.20	2.75	1.90	***	
MOTIVATION					
Intention to use nets[1]	2.79	2.68	1.35	**	⑨
Beliefs – regarding transmission[2]	2.85	2.57	1.80	***	⑦
Perceived susceptibility to malaria					
- for children under 5	3.12	3.07	1.14	**	
Locus of Control – I can control whether or not I get malaria	2.98	2.54	1.85	***	
POPULATION CHARACTERISTICS					
Respondent not educated above second level	38.6%	52.2%	0.47	***	
Women	55.2%	32.5%	2.07	***	

2 DETERMINANT OBJECTIVES, continued...

ART 2 Think carefully about how factors influence each other

There are two issues to consider here.

A. Causation Versus Correlation:

The segmentation table can only tell us which determinants are correlated with the desired behavior. They cannot tell us what causes the behavior. Marketers must use their own logic to assess the causal relationship. Three possibilities should be considered: (1) the determinant or factor does indeed influence the behavior and can be considered a determinant; (2) the reverse is true and the behavior actually influences the determinant; or (3) a third, unspecified factor is influencing both the determinant and behavior simultaneously.

For example

You may often find that self-efficacy is higher among consistent users of a product than it is among non-users. This could lead one to conclude that self-efficacy must be increased in the target group in order to create more users. However, it may also be the case that product use triggers higher self-efficacy. One can imagine how this could be true for simple behaviors like using a bed net.

It is important for marketers to use their understanding of the target group to decide which direction the influence is likely going – from the determinant to the behavior or from the behavior to the determinant. In some cases, qualitative research can help you better understand this.

B. Determinants That Affect Other Determinants:

It's also possible that some determinants might influence other determinants rather than directly influencing the behavior. For example, increasing knowledge may counter false beliefs and then this, in turn, might influence behavior. In other cases, the opposite might be true – adopting a new behavior may expose the person to new knowledge which would stimulate an attitude change.

In situations where there are several determinants to choose among, it is important to use available information and experience to decide if there are opportunities to address more than one determinant at a time. Think of it as a 'two-for-one' scenario where changes in one determinant affect other determinants as well as the behavior in question.

For example

Low self-efficacy related to condom negotiation might be creating an external locus of control in female sex workers that then leads to inconsistent condom use. By addressing the self-efficacy determinant, the locus of control determinant will also be addressed.

However, remember that assumptions are just that – best guesses about data, and, thus, could be wrong. Nonetheless, marketing planning often requires making assumptions. Therefore, it's important to be clearly aware of and mark the decisions you make that are based upon assumptions and the decisions that are based upon proven fact.

2 DETERMINANT OBJECTIVES, continued...

ART 3 Consider each determinant's potential for change

If the monitoring score is too high (e.g., 90% or a mean of 3.5) it might be difficult to raise it further. It's better to pick determinants with lower monitoring scores, if possible.

> Be careful to not use the segmentation table scores!
> Because PSI measures impact at the population level, you have to look at the monitoring table scores.

ART 4 Examine secondary research

Review secondary research to see if it supports any of the determinants you have found. This provides stronger evidence for prioritizing one over another.

ART 5 Consider the resources that are available

? Money – Will it be expensive to try to change that determinant?

? Time – Will it take too long to change it?

? Skills – Do you have the in-house expertise to try?

ART 6 Weigh external factors

? What communication channels are available? Are they appropriate for the determinant(s) being considered?

For example

> If radio is the primary medium in your country it may be difficult to address a visual-oriented topic such as self-efficacy for condom use.

? What other organizations are already working on this topic and what are they addressing? Are they effective? Are they reaching enough of the target group?

For example

> If the Red Cross is doing an extensive campaign on the causes of malaria, it's probably unnecessary to focus on the knowledge determinant.

DETERMINANT OBJECTIVES: a summary

This process involves both 'science' and 'art'.

The 'Science'
Some guidelines are definitive rules that must always be followed.

1. Choose only starred items.
2. Examine the Odds Ratios.
3. Know what the Determinant is measuring.

The 'Art'
Other guidelines are applied more subjectively.

1. Look for the 'story' behind the numbers.
2. Think carefully about how factors influence each other.
3. Consider each determinant's potential for change.
4. Examine secondary research.
5. Consider the resources that are available.
6. Weigh external factors.

3 SALES & CLIENT FLOW TARGETS

There are many ways of projecting sales based on past performance. The example provided is one simple approach that relies on existing data to uncover causal relationships through statistical analysis. These causal relationships can be used to predict future sales.

A time series analysis of a product's past sales can be split into four major components:

TREND

1. Trend (T) is the result of basic developments in the environment.

CYCLE

2. Cycle (C) captures the wavelike movement of sales. Many sales are affected by swings in general economic activity, which tends to be somewhat periodic.

SEASON

3. Season (S) refers to a consistent pattern of sales movements within the year. Season describes any recurrent periodic sales pattern related to weather, holidays, annual budgets, festivals, and so forth. Such factors provide norms for forecasting short range sales.

ERRATIC EVENTS

4. Erratic events (E) include unpredictable events (such as a natural disaster or political upheaval) that should be removed from past data to see the normal behavior of sales.

Time series analysis consists of dissecting the original sales series into the components T, C, S, and E which would then be recombined to produce the overall sales forecast.

For example

TIME SERIES ANALYSIS EXAMPLE

T PSI/N sold 120,000 condoms this year. It would like to predict next year's December sales. The long-term trend shows a 5% sales growth rate per year. This alone suggests sales next year of 126,000 (=120,000 x 1.05).

C However, a market recession is expected next year and will probably result in total sales achieving only 90% of the trend adjusted sales. Sales next year will more likely to be 113,400 (90% of 126,000).

S If sales were the same each month, monthly sales would be 9,450 (=113,400/12). However, December is an above average month for sales with a seasonal index standing at 1.30; therefore, December sales may be as high as 12,285 (= 9,450 x 1.3).

E No erratic events such as floods and heavy rains or stock outs are expected; therefore, the best estimate of new condom sales for next December remains 12,285.

4 MAP INDICATORS FOR COVERAGE & ACCESS

MAP stands for Measuring Access and Performance and is PSI's tool for measuring a product's or service's availability.
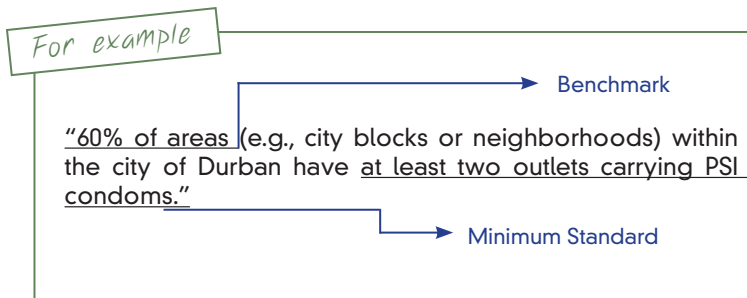
MAP measures availability in four ways, three of which are discussed below. The fourth way, Quality of Coverage, relates to measures that are specific to various marketing 'P' strategies, and, so, is not discussed here.

The three measures of MAP discussed below are…

| 1. Coverage | 2. Access | 3. Equity of Access |
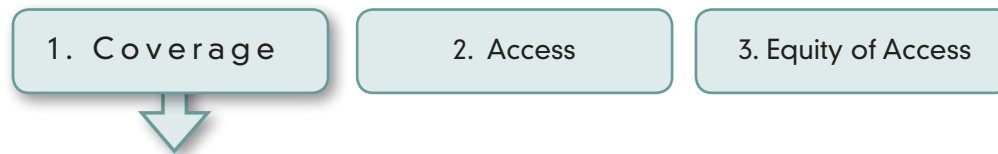
? What is it?

This is the proportion of geographically defined areas – i.e., the benchmark – in which the product or service is available according to a pre-defined minimum standard.

For example

Benchmark

"60% of areas (e.g., city blocks or neighborhoods) within the city of Durban have at least two outlets carrying PSI condoms."

Minimum Standard

Using minimum standards and benchmarks eliminates the need for a complete survey of every outlet within the geographic area. This is because it allows the use of Lot Quality Assurance Sampling (LQAS) which provides an acceptable level of error for making management decisions using a sample of 19 areas. At least 92% of the time it accurately identifies whether a coverage benchmark has been reached or whether a product/service area is below the average coverage of a program area.

The steps for setting a 'coverage' marketing objective are…

1 STEP Set the Minimum Standard
Consider the following…

A. If it's a planned or impulse purchase…

If the product or service is purchased in a planned way – it's likely that a lower minimum standard for coverage would suffice, e.g., one outlet per area.

For example

When PSI Kenya first introduced insecticide treated nets (ITN), it assumed the product needed to be made as widely available and accessible as possible. For this reason, they pursued a distribution strategy similar to condoms, trying to fill as many fast moving consumer goods (FMCG) outlets as they had done with their condom brands.

Ultimately, this was not possible. Most FMCG outlets were not willing to stock them because they were relatively expensive and sold more slowly compared to their other product lines. Most of their stock was comprised of 'disposable' goods which are less expensive and sell more quickly.

In addition, from a consumer perspective the cost made it a planned purchase, and thus consumers were willing to travel longer distances to purchase an ITN in specialized textile shops. Thus the minimum standard could justifiably be much lower for ITN's than for condoms.

4 MAP INDICATORS FOR COVERAGE & ACCESS, continued...

1 STEP **Set the Minimum Standard**
Step 1 for setting a 'coverage' marketing objective, continued...

If it is purchased on impulse, then it's likely that a higher minimum standard is needed, e.g. five outlets per area. Think of Coca Cola and how ubiquitous their distribution is.

In reality, not all products will fit nicely into one or the other category of planned or impulse purchase. Take, for example, the Love Plus condom brand from PSI Romania (PSI/Ro). Their in-house research revealed that condoms in this market are purchased both ways. When the consumer sees it at the register, he 'stocks up' for the future, something PSI/ Ro is calling 'planned impulse'. However, at times, the consumer also goes to a specific outlet, such as a pharmacy, having planned to buy condoms. This suggests the value of utilizing a blend of marketing strategies that would have been only half-realized had PSI/Ro not done the necessary research and instead chosen one or the other strategy.

B. Using penetration to help set minimum standards…

Penetration refers to the percent of all outlets that carry your product. Some country programs conduct an audit of outlets during their first experience with MAP in order to clearly understand the number of outlets that carry their product within each area of the country. (e.g., a region or city or neighborhood, etc.)

This information is used to set their minimum standards. For example, if they already have two outlets per geographic area and they feel this is not enough, then the minimum standard should be at least three per area.

C. Using population sizes rather than geographic areas in the minimum standard…

When population density varies within a region, it can be more helpful to set the minimum standard based on the population size (e.g., one outlet per 1000 people) than the geographic area (e.g., one outlet per city block).   Consider the example below from PSI Benin.

Note the different population sizes of each neighborhood within the city of Cotonou. Obviously, setting a flat standard of coverage for each area (e.g., '3 outlets with your product/service') may mean strong coverage for an area with 2000 people, but weak coverage for an area with 12,000.

To remedy this, you can choose 'one outlet per 1,000 population' as the minimum standard. This can also be altered for different areas, e.g. higher for urban or lower for rural.

GEOGRAPHICAL UNITS	Total outlets	Population	Outlets w/ Prudence +	Average people per Prudence + outlet	Penetration
DANDJI	17	7,277	5	1,455	29.4%
N'VENAMEDE	14	3,361	8	420	57.1%
SENANDE I	18	5,318	12	443	66.7%
YENAWA	13	7,632	10	763	76.9%
SEGBEYA SUD	26	2,133	8	267	30.8%
ENAGNON	30	11,792	6	1,965	20.0%
WLACODJI PLAGE	11	6,103	8	763	72.7%
AIDJEDO III	15	5,037	4	1,259	26.7%
HINDE I	14	4,795	10	480	71.4%
SEDAMI	21	1,915	4	479	19.0%
GBEDAGBA	39	5,044	16	315	41.0%
Total	218	60,407	91	664	41.7%

4 MAP INDICATORS FOR COVERAGE & ACCESS, continued…

The steps for setting a 'coverage' marketing objective, continued…

2
STEP **Set Benchmarks in Your Marketing Objectives**

Once you've set your minimum standard, establish your benchmark. Combined, these become your coverage marketing objective.   Benchmarks are often set on the following factors.

- Geographic priorities – Do some areas suffer more from the burden of disease than others? If so, those may be given a higher benchmark.

- Budget size & other resources – It may not be realistic to set high benchmarks if the resources are not available to reach them.

When setting your coverage objectives, it helps to translate it into an absolute number so that you can clearly understand the magnitude of the task you've set for yourself.

For example, how many new outlets would have to be opened in order to meet a benchmark of 60% of all areas having at least 3 outlets with the product available? Is this realistic considering the resources available?

1. Coverage	2. Access	3. Equity of Access

? What is it?

'Access' is defined as the proportion of the target group that can be found within a 'catchment area' of a product outlet or service delivery point.

This is most often used for marginalized populations, like sex workers, and impulse products like condoms.

It sets the acceptable distance that the target should have to travel to access the product or service in question. This acceptable distance is considered the catchment area.

An example of an access objective might be '50% of commercial sex workers are located within 300 meters of an outlet selling a PSI condom'.

The steps for setting an access objective are…

A. Choose the hot zone for which you want to measure access. A hot zone is a collection of hotspots, such as a red light district. A hot spot is a place where high risk activity occurs such as a brothel.

B. Determine if you know the size of the target group within the hot zone.

- If you do, then your objective can define access as a percent of the target falling within the catchment areas. For example, '50% of CSW's are located within 300 meters of an outlet selling condoms.' Your research department can help you estimate population sizes.

- If you do not, then you will have to define access as a percent of hotspots falling within the catchment areas. For example, '50% of hotspots are located within 300 meters of a product outlet'.

C. Map the hot zone with a Geographical Information System (GIS) to identify all the relevant outlets/service delivery points, and hotspots.

④ MAP INDICATORS FOR COVERAGE & ACCESS, continued...

Setting an Access objective, continued...

D. Decide on your catchment area size. Again, access objectives are most often set for impulse products, like condoms. However, sometimes they are also set for planned-purchase products like bed nets. Impulse products would require a smaller catchment area to maximize convenience for the target. Planned-purchase products could enjoy a larger catchment area since the target is generally more willing to travel to make its purchase. Some examples of catchment areas for planned-purchase products include "less than a 30-minute journey by foot (which equals about three kilometers) or by bus (ten or more kilometers).

Work with...

your Research Department to ensure that your TRaC includes the questions that would help you understand how large your catchment area should be.

E. Establish the current level of access according to GIS survey data taken above. For example, country X has four hot zones. Each hot zone is estimated to have about 1000 CSW's, for a total CSW population of 4000 (4 x 1000 = 4000). The catchment area size around each condom outlet in each hot zone is set at 500 meters.

The GIS mapping reveals that…

- in hot zones A, B and C, 30% of the target meets in hotspots within the catchment areas (meaning that 70% of these populations are outside the catchment areas), and
- in hot zone D, 100% of the target meets in hotspots outside the catchment.

In this example access would be 22.5%, because:

	Zone A	Zone B	Zone C	Zone D	TOTAL
Target Size: % with Access:	1000 X 30%	1000 X 30%	1000 X 30%	1000 X 0%	4000 n/a
Total w Access:	300	300	300 %	0	900
% with Access: 4000 ÷ 900 = 22.5%					

F. Set the desired level of access as your marketing objective. This should be based on…

- *the buying habits of your target audience* – This should be recorded in your Audience Profile and can be learned through qualitative studies like FoQus for Marketing Planning,
- *your available resources and distribution capabilities* – The smaller your catchment area you will choose, the more resources you will need to meet your access targets.

1. Coverage	2. Access	3. Equity of Access

This final category refers to setting access objectives for multiple target groups at the same time and ensuring that each group will enjoy the same level of access. This is used when

- the marketing plan has multiple target groups within it, for example an HIV prevention plan for several high risk groups, and
- each group has equal need for a given health product, such as male and female sex workers both having an equal need for access to condoms.

The process for setting access objectives remains the same as described in the previous section. The only difference for this category of MAP objectives is that each target would have the same numerical objective.

TRIAL VERSUS LOYALTY STRATEGY

→ When specifying a sales/client flow objective, we suggest you also specify the source of this behavior change – either you want…
  • new consumers to try your product or service (called a 'trial' or 'penetration' strategy) or
  • current consumers to consume more (called a 'loyalty' or 'usage' strategy).
Of course, also explain your rationale.

Example…

OBJECTIVE	T. VS. L.	RATIONALE
Sell 10,000 bottles of safe water solution by end 2010	Trial	The current user base is small – just 10% of the target group

By end 2010, significantly increase % of Sex Workers who report being HIV tested within last 6 months from 30%.	Loyalty	Of all the SW's surveyed…
		  • - 80% had ever been tested
		  • - but only 30% had been tested in the last 6 months.

→ This decision will affect many of your subsequent marketing decisions.

Example…

A TRIAL STRATEGY MIGHT…	A LOYALTY STRATEGY MIGHT…
- Distribute free samples - Run discounted price promotions - Sell in packaging with a reduced number of units - Emphasize visibility at point of sale.	- Increase direct-to-consumer communication via websites, improved packaging inserts, etc. - Sell in packaging with an increased number of units - Motivate consumers to advocate with friends or family - Offer rewards for regular participation in clinic/drop in shelter activities, etc.

Where are we now?

PRODUCT P STRATEGIES

Summary

At PSI, Product P strategies refer to products, services or behaviors; anything that PSI is promoting in order to have a health impact.

In general, it includes strategies related to…

1. Brand strategy
2. Supporting products/services
3. Attributes
4. Packaging
5. Quality

Where are we now?

At PSI, 'product P' strategies refer to products, services or behaviors (p/s/b), in short – anything that PSI is promoting in order to have a health impact.

In general, it includes strategies related to…

❶ Brand strategy

❷ Supporting products/services

❸ Attributes

❹ Packaging

❺ Quality

A service will sometimes break out parts of their Product P strategies into additional 'P's', such as…

> people (for staffing)
> processes (for quality)
> physical structure (for the clinic in which the service is provided).

⚠ **WARNING!**

Before deciding to launch a PSI-branded product or service into the marketplace, be sure that affordable and accessible options do not already exist for your target. A total market approach would only launch a new product or service if it filled an unmet need in the market.

For example, when launching its HIV prevention program PSI China chose to distribute and promote DKT condoms rather than introduce another brand into an already crowded marketplace. This shortened their start up time and enabled them to begin generating health impact earlier.

❶ **Brand Strategy**

The positioning chapter already discussed the three elements of a brand strategy
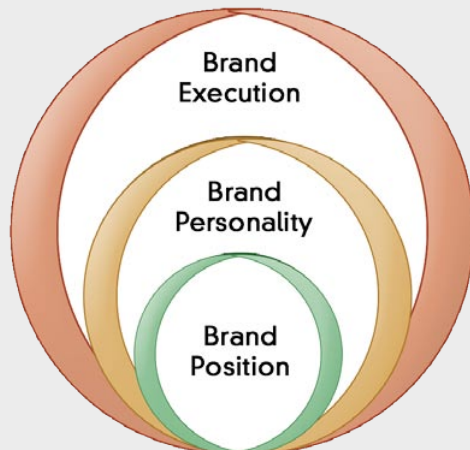
We can add Brand Name to this, if your p/s/b is new. Some things to consider when choosing a brand name are:

❓ Is it easy to pronounce, recognize and remember?

❓ Does it capture or define product benefits or qualities (emotional or functional)?

❓ Is it distinctive (not too similar to another brand name)?

❓ Does it speak to the brand positioning and personality?

A brand name does not have to fit all these criteria, but it is useful to at least consider them all.

❷ Supporting products/services

- These are additional products or services you might promote in order to facilitate adoption of the p/s/b. They are not essential in that the target does not require it in order to adopt the p/s/b, but they do make it easier for the target.

> Supporting products and services can help address barriers to the promoted p/s/b as identified in primary or secondary research.

Example...

SUPPORTING PRODUCT…	HELPS FACILITATE…	BY ADDRESSING DETERMINANTS…
HIV telephone hotlines	Any HIV prevention behavior, such as condom use, abstinence, testing, male circumcision, etc.	Knowledge, beliefs, outcome expectations, threat, social support, self efficacy, etc.
An in-school youth club	Any HIV prevention behavior, such as condom use, abstinence, testing, male circumcision, etc.	Social norms, social support, self efficacy, knowledge, beliefs, outcome expectations, etc.
Child thermometers	Parent's identification of a child's fever that is high enough to warrant taking them to the doctor for malaria treatment	Beliefs, knowledge, self efficacy, threat, etc.
Adherence 'buddy' programs	Adherence to HIV or TB medications	Social norms, self efficacy, social support, beliefs, etc.

- Supporting product and services are different from temporary promotional activities in that they will outlast a single marketing plan.

  For example, typically you would not start a youth club to promote abstinence for just one school year.

- You will need to consider the same strategic 4P issues for a supporting p/s/b as you would a 'normal' p/s/b.

  For example, you might…

  - brand your supporting product, and, thus, need to decide brand positioning, personality and execution; or
  - promote your supporting product, and, thus, need to create a communication plan for it, etc.

! **WARNING!**

Too often, PSI stops with the essential product and does not consider the possibility of adding a supporting product. Stretch your imagination and think about possible supporting products for your p/s/b.

3 Attributes

Attributes are functional features of your product or service that your target needs or wants and, thus, provide a benefit.

For example

The <u>conical shape</u> of a bed net makes it <u>easier to hang</u>

Attribute ⟶ Benefit ⟵

Attributes can…
- Contribute to the <u>positioning and personality of the brand</u> ⟶ E.g., a condom brand that promises its users fun could be colored or studded.
- Address specific barriers to the promoted product or service.

For example

ADD–ONS TO A PRODUCT OR SERVICE

E.G., – PSI Myanmar's TB adherence programs offers travel <u>vouchers and bags of grain t</u>o its clients.

> Reduces the travel cost and opportunity cost of not working that day. Also helps improve nutrition and general health, as many clients are co-infected with HIV.

E.G., – Condom packaging that <u>includes lubricant</u>

> Increases availability of lubricant, which is essential for condom use among MSM and often CSW's.

STAFFING FEATURES FOR A SERVICE

> Sometimes called the 'People P'.

E.G., – PSI Lesotho learned that male HIV CT clients often avoided New Start because its counselors were all female and they preferred to be counseled by men because they felt less judged. Thus they are now trying to recruit more male counselors

E.G., – PSI Russia learned that MSM are often more honest with female outreach workers than MSM outreach workers. This is because they might view an MSM outreach worker as a potential sexual partner.

④ Packaging

Good packaging should do three things…

1 … clearly answer three questions.

1. What am I? → - the category → - e.g., condom
2. Who am I? → - the brand → - e.g., Number One
3. Why am I right for you? → - the positioning → - e.g., impresses your partner

2 … communicate that the product inside is of high quality.

Compare your packaging to others in the same category.

❓ Which best communicates the idea of quality and why?

❓ For example, do they use pictures of people or abstract designs?

Examine the packaging of other high quality, upper end products that are sold in similar outlets, such as cosmetics in pharmacies.

❓ What common elements do packaging like this share?

❓ For example, is there embossed writing in gold or silver?

❓ Do they use any symbols that represent quality?

Consider, for example, the symbols that some PSI platforms are using to communicate quality.

3 … facilitate use. For example:

• Condom packaging should be easy to open so that it minimizes interruptions during sex.
• Safe water products should have easy to understand instructions and packaging that helps the user dose correctly.

Different sized packaging can serve different purposes.

• Larger sizes (e.g., a condom pack with four rather than three condoms) can increase loyalty among the target because you have covered additional risk occasions with a single purchase. This is important in markets where there are many low quality brands and/or you want to increase overall use before increasing the number of new users.

> It will also increase your health impact – 33% more DALYS via the same consumer purchase!

• Smaller sizes (e.g., single serve lubricants) can stimulate trial because the price point will be lower. This is important in markets where you want to drive penetration (i.e., trial) before loyalty.

• Packages that announce '1 more unit free' or 'X% more free' can also stimulate trial. Free is a powerful word that can drive purchases.

• The size and type of the sales outlet will impact the size and design of the packaging and display racks. Kiosks, for example, need smaller dispensers with fewer units per package.

• Consumer purchase habits will also influence packaging size. If they do not or cannot spend a lot at one time, then smaller sizes are necessary in order to stay affordable. If the target prefers to buy in bulk (e.g., sex workers and lubricant), then the packaging should be larger.

> In other words, take the perspective of the customer (i.e., the trade channels) and the consumer when designing your packaging.

❺ Quality

- When it comes to health products and services, consumers always expect high quality.

- Relying on third party international standards for quality, such as WHO, is not enough. We must also define quality as the target perceives quality.

- -

Case in point…

- PSI Angola's Legal condom brand suffered declining sales after a change in manufacturer resulted in a change in the product itself. The new condoms had a thicker, whiter lubricant that made them opaque and stickier. This was in contrast to the previous condoms which were more transparent and silky feeling. Even though both condoms passed WHO standards and manufacturer testing, the target perceived this change as a decline in quality It wasn't until Angola switched back to the original manufacturer that sales began to rebound.

- -

- Because, by definition, a brand is the summation of everything the target thinks and feels about a product or service, PSI must deliver this quality through every brand 'touchpoint'.

- A touchpoint is any point of interaction between the brand and the consumer that happens before, during or after its use.

TOUCHPOINT EXERCISES

A touchpoint exercise is useful for defining quality as the target perceives it and for prioritizing the most critical touchpoints for immediate attention.   See the example left; an extract from PSI South Africa/ SFH's family planning & medical abortion program.

1. Place yourself in your target group's shoes and walk through each possible interaction they might have with the brand.

2. Prioritize the most critical touchpoints for that marketing plan period.

3. Define through brainstorming or research how the target might define quality at those critical touchpoints.

TOUCHPOINT	PRIORITY
Mass media	C
IPC	C
Word of Mouth	C
Outside of clinic/signage	B
Pharmacy (e.g., in-store, co-promotions)	C
Website/Yellow Pages	C
Hotline/Call Center	A

Quality Attributes:
- Separate numbers for abortion emergencies vs. generic matters
- Female operators – not too old
- Open 24 hours a day/7 days a week
- Trained, friendly, knowledgeable, competent staff

Receptionist/waiting room	A

Quality Attributes:
- Clean, flowers, relaxed, brand color
- Ventilated, comfortable temperature
- TV/Video while waiting & magazines
- Basic training on how to handle incoming clients
- Female around the age of 25

Bathrooms	B
Counseling/consultation rooms	A

Quality Attributes:
- Private, cheerful, welcoming, neat, well organized
- No barriers – 2 chairs, small table with drinks
- Non-clinical environment, warm, feminine colors

Touchpoint exercises are also valid for products and would likely also highlight the importance of things like:

- Product performance
  This, of course, is critical for all our products.

- Packaging's visibility at shelf
  Consumers can only buy your product if they can find it in the store.

- Presence of in-store promotional materials
  For impulse products, these become very important.

Examples of touchpoints include…

- Exposure to adverts
- Word of mouth
- Appearance of packaging at shelf
- Clinic staff (for services only)
- Building that houses the clinic (for services only)
- Product performance (for products only)
- Counseling (for services only), etc.

→ Sometimes discussed in the 'People P' section of a services marketing plan.

→ Sometimes in the 'Physical Structure P' section of a services marketing plan.

→ Sometimes in the 'Process P' section of a services marketing plan.

Where are we now?
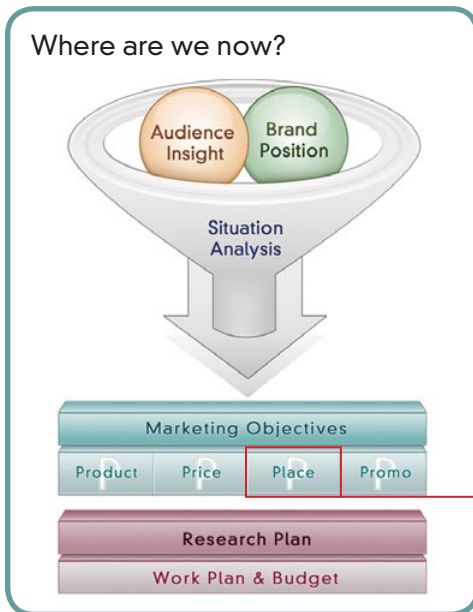
PLACE P STRATEGIES

Summary

Place P strategies must balance consumer access to the brands with the customer's need for profit.

Consumer considerations
1. Is it an impulse or planned purchase?
2. Where and when does the target prefer to purchase?
3. Does the brand positioning speak to any Place P strategies?

Customer considerations
1. Make your trade customers long-term distribution partners through…
   a. consistent sales volume,
   b. competitive profit margins, and
   c. merchandising support.

2. Be as cost efficient as possible by…
   a. relying on commercial distribution systems,
   b. minimizing the number of direct customers,
   c. avoiding undercutting your wholesalers and distributors,
   d. distributing to outlets with a large market share, and
   e. measuring efficiency.

Where are we now?

Place **P** strategies...

1 …must balance consumer access to its brands with the customer's need for profit.

2 ... accomplish this through a combination of 'push' and 'pull' strategies. See below the explanations for these terms.

3 … are highly dependent upon the environment in which they are employed because the sophistication of distribution systems vary so much between countries.

This makes giving guidance around Place P strategies difficult. Nonetheless, there are some fundamental principles that are widely applicable regardless of the locale.

Too much push and too little pull can result in an overstocked distribution chain, also called a pipeline. Too much pull and not enough push can result in stock outs, when the brand cannot be found at the shelf.

PUSH STRATEGIES encourage customers to purchase from PSI and then sell on to the next link. See discussion on page 3 of this section.

CUSTOMERS are anyone to whom PSI sells directly and then who sells on to another 'link' in the distribution chain, e.g., wholesalers, distributors, retailers, etc.
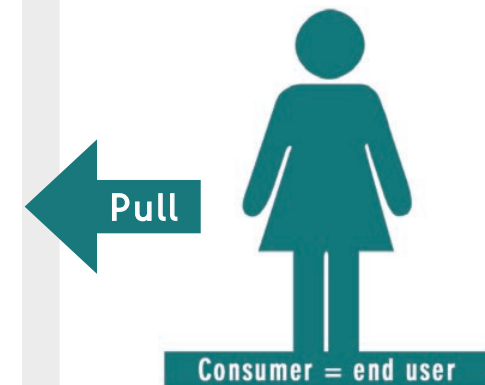
PULL STRATEGIES generate demand among consumers (e.g., merchandising) and can include other Ps (e.g., mass media campaigns).

As with each of the 4P's, consumer insight should drive Place P decision making.

1 Is the product purchased on impulse or in a planned manner?

Impulse products should be made more widely available than planned-purchase products. This is because the consumer may not decide he should purchase it until he actually sees it on a shelf. With planned products, the consumer decides in advance he wants to purchase and is usually willing to travel some distance to do so.

Be sure the audience profile indicates whether the product/service purchase is planned or impulse. If you don't know this, then include it in your Research Plan.

This consideration influences the MAP measures of Coverage and Access as discussed in the Marketing Objectives chapter. Thus, impulse-purchase products require a higher minimum standard than planned-purchase products. Qualitative research can help better understand your consumer's purchase behavior, and thus, set your minimum standards.

2 Where and when does the target prefer to purchase the product/service?

3 Does the brand positioning speak to any Place P strategies?

For example, in Romania one of the reasons PSI distributes Love Plus condoms through pharmacies (which do not represent a large share of category sales) is because this is where the target expects to find reputable health care products. This type of outlet reinforces their quality positioning.

FOR SALE

psi Push Customer Pull Consumer = end user
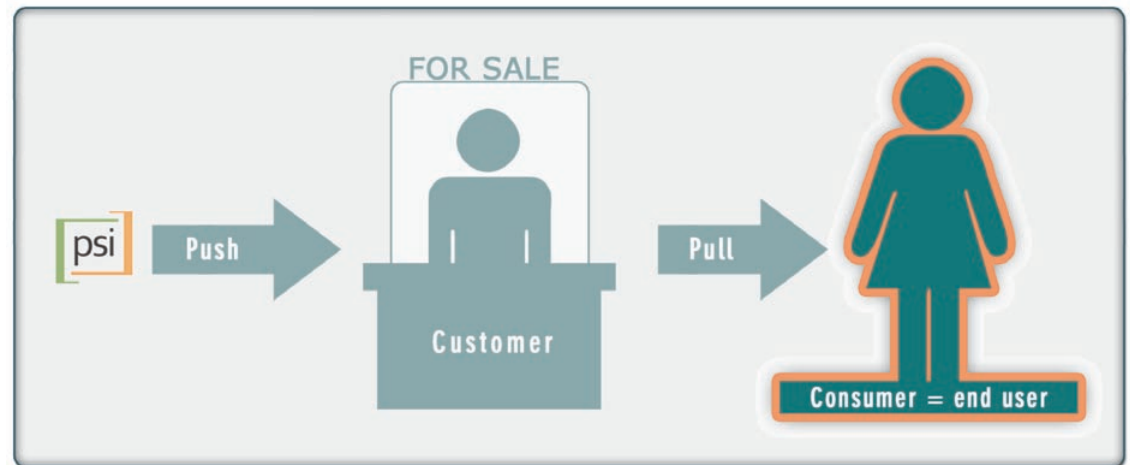
An example

SCENARIO	PLACE P IMPLICATION
Male clients of sex workers often prefer to purchase condoms on the way to or even at the brothel.	Sell to brothels and retail outlets in "hotzones" near brothels that are open late at night.
Couples often can only go together for HIV testing during weekends.	Conduct mobile outreach during the weekends and places where couples go together, such as churches.
Young males often do not own automobiles and must rely public transport.	Locate the clinic on a bus route.

Work with...

Your Research Department to ensure that your TRaC asks where and when respondents prefer to purchase the brand in question.

1 Strive to make your trade customers long-term distribution partners by helping them generate a reasonable amount of profit.

This can be done by...

a Working to ensure consistent sales volume for customers by balancing supply with consumer demand.

- If there are too many retail outlets in a given area, then the product will sit on the shelf and your customers will not generate many sales. This can damage your relations with the trade.

- If there are too few outlets in a given area, then you risk stocking out of the product and this means missed opportunities to make sales.

'Trade' – any link in the distribution chain, e.g., wholesalers, distributors, retailers.

b Offering competitive, but not overly lucrative, profit margins to the trade.

- If margins are too high, you risk losing the opportunity to offset your own costs.

- If margins are too low, the trade will not be motivated to sell your product, making it hard for consumers to find the product.

- For these reasons, it's important to understand the profit needs (i.e., required margin X required sales volume) for all trade partners in your channel. This will also help you gauge the number of outlets you should strive for in a given area.

c Providing support through merchandising materials and assistance.

psi | Push → | Customer | → Pull | Consumer = end user
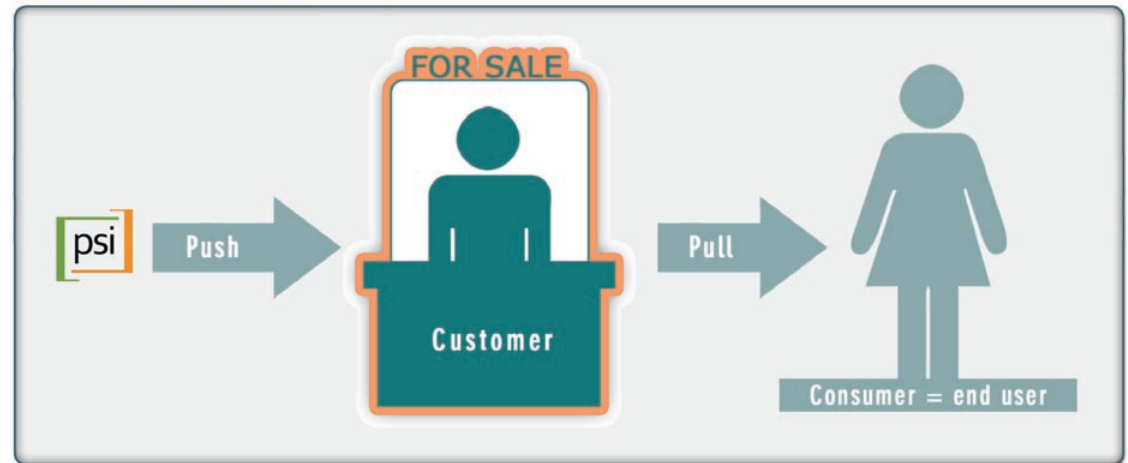
This is especially critical for impulse products, but also important for planned purchases. Ask the following questions...

? Is the brand stacked neatly on the shelf? This reflects well on the brand in the mind of the consumer.

? Are there any point-of-sales materials inside the store that attract the eye either to the shelf or outside the store indicating the product is 'sold here'?

? Are there any point-of-sales materials outside the store, such as a 'sold here' sign?

? Is the product expired?

? Is the product being stored correctly – e.g., out of sunlight?

? Can consumers access the product without having to ask the retail clerk? For example, most people prefer to not have to ask for condoms.

? Is the shelf in a highly-trafficked part of the store, e.g., cash registers and end-of-aisle displays?

? Is the brand at or slightly above eye level? This increases the likelihood the consumer will find it.

2 Aim to be as cost efficient as possible by…

a Relying on existing commercial distribution systems whenever possible…

…rather than distributing directly to retail outlets. Direct distribution that PSI undertakes with its own sales force is expensive (PSI jokingly refers to this as DHL Distribution) and often unnecessary considering that even the most remote villages are usually part of some type of distribution system (How else do they have things like candles and matches available?).

b Minimizing the number of direct customers…

… while maximizing access for the consumer. Part of the reason to utilize commercial distribution systems is because it lessens our work load. However, if we create a system that has more direct customers than is necessary, we've defeated this purpose.

c Avoiding undercutting your wholesalers and distributors

Sometimes a PSI platform will sell to distributors/wholesalers and also directly to retailers within their geographic range. This effectively robs the distributor/wholesaler of that sales revenue.

d Distributing to those types of outlets that enjoy a large share of category sales

It's important to understand changes in the marketplace and distribute the product through channels that are growing and capturing an increasing share of category sales.

e Measuring efficiency in the form of a sales-and-distribution cost per unit sold…

…and track this over time. Without such a quantitative measure it is impossible to know if things are improving or not.

The general idea is to add all the sales and distribution costs associated with getting your brand from your warehouse to the first link in your distribution chain (the numerator) and then dividing that by the total number of units sold (the denominator).

For platforms that distribute multiple brands per vehicle or salesperson, the question then becomes how to allocate the 'shared' numerator S&D costs across the denominator products. (Think of a PSI sales truck carrying condoms and bed nets.) Exactly how this allocation is made can be decided by each PSI office.

Example…

SALES AND DISTRIBUTION COSTS

E.G:
- ▶ sales personnel salary and performance remuneration (e.g., volume related bonus, etc.);
- ▶ vehicle running costs including fuel and maintenance;
- ▶ other travel costs including per diem; and
- ▶ any third party shipping costs (if PSI uses a shipper to deliver product from our warehouse to customers).

Don't include cost of goods sold (COGS), which are commodity and packaging costs, because these are under minimal PSI control and thus not a measure of our efficiency.

FOR SALE

Customer

W o r k w i t h…

- 💬 your Research Department to ensure that your TRaC asks respondents where they usually buy the product in question and then monitor these responses over time,
- 💬 your PSI/Washington Financial Analyst to calculate a sales-and-distribution cost per unit sold.

Where are we now?

PRICE P STRATEGIES

Summary

There are four things to consider when setting Price P strategies for products or services.

1. Consumer Considerations
   - Willingness to Pay (W2P)
   - Price points
   - Available denominations
   - Communicating quality

2. Trade Considerations

3. Cost Recovery

4. Marketplace Dynamics

Where are we now?

PRICE P

- This is usually the most neglected P strategy. Often, we set the price when we launch the product or service and then it remains the same for years (and years and years).

- Sometimes we rationalize this by telling ourselves we have to keep prices as low as possible in order to remain affordable.

- However, if we don't at least keep up with inflation, we are actually damaging the quality perception of our brand and likely limiting our health impact.

- Furthermore, if our price is kept too low, we effectively shut out private sector competitors, hampering market development and leading to an unsustainable situation which could collapse if/when the donor exits.

- Therefore – you MUST actively manage your pricing strategy. Sustainable health impact depends upon it.

Example...

▶ PSI Cambodia launched their Number One condom in 1994 and kept the price the same ever since. As a result, in 2008 PSI dominated the marketplace with a 92% market share (Number One at 88% and OK, their second brand, at 4%). This, of course, was an unsustainable situation as the price was heavily subsidized by the donor and did not generate any significant cost recovery.

▶ Eventually the donor, USAID, caught on and asked that PSI actively work to bring more competition into the market. To that end, PSI Cambodia has since embarked upon a strategy of category segmentation by raising Number One's price and re-positioning it as a more upscale condom. OK condom, in comparison, was re-launched with a value positioning at a lower price point versus Number One.

▶ It is hoped that by raising the price of Number One, 'space' will be created in the market for other higher priced commercial sector brands.

There are four things we consider when setting the price of our product or service.

1 **Consumer considerations** – E.G., Is the price low enough to be affordable but high enough to convey quality? Is it consistent with the brand's positioning?

3 **Cost recovery considerations** – E.G., Over time, is progress being made towards reaching an appropriate level of cost recovery? Are there possibilities to recover more costs while still remaining affordable?

2 **Trade considerations** – E.G., Are retailers adhering to the recommended price? How do the margins compare to similar products or services?

4 **Marketplace considerations** – E.G., How have past price increases compared to inflation or changes in consumer income levels? What has been the effect of past price increases on sales? What are the trends in pricing for similar products/services?

Consumer Considerations
THINGS TO THINK ABOUT:

Willingness to Pay (W2P)

PSI has used several methods to determine a consumer's W2P for a product or service.

→ You can examine prices paid for other similar products or services. For example, PSI Cambodia has compared the price of their upscale Number One condom to premium beers and cigarettes. Likewise, PSI Sudan has compared the price of their Waterguard product to a household's 'important but non-essential' products like tea and sugar.

→ Five W2P questions can be inserted into a TRaC questionnaire to determine the price that the majority of respondents report they will pay for a product or service. A problem with this methodology is that respondents almost always over estimate what they are actually willing to pay.

→ To compensate for this, you can add an additional question at the end of the W2P questions that asks respondents how sure they are about their answers. For example, "Just to confirm, you mentioned that you would be willing to buy this [product] at the price of X. How sure are you of this response? –Extremely sure; -Fairly sure; -Somewhat sure; -Not sure at all".

Research has demonstrated that consumers report with considerable accuracy how well they have answered previous questions, making it possible to omit people that did not answer 'extremely sure'.

→ An alternative method is the Van Westendorp method, which asks respondents for four price parts.

How much is…

1. too expensive;
2. expensive, but still within reason;
3. too inexpensive; and
4. inexpensive, but still within reason?

Work with…

💬 your Regional Researcher to determine which methodology is best for your situation.

Answers are then plotted on a graph to reveal the range of acceptable prices and the optimal price. See the example that follows from PSI Somaliland. This method should only be used when respondents express some interest in purchasing the product.

→ PSI is also piloting an alternative method in Myanmar that solicits people in their homes to actually buy the product in question at randomized prices.

→ Similar to this, you could test market different price points at different outlets and then monitor changes in sales.

→ And beyond this, PSI has used outside agencies to conduct more sophisticated statistical methods for setting prices, such as a conjoint analysis or discrete choice modeling.

1

Consumer Considerations, continued...
THINGS TO THINK ABOUT:

Price points

Some prices can act as psychological thresholds, above which the consumer is less likely to pay. For example, PSI Zambia understood that 5000 Kwacha is considered by their target to be 'real money', whereas amounts below this are not. In other words, if someone on the street asks for 3000K, you are likely to give it. If they ask for 5000K, you are not. This helped them decide to increase their HIV CT price from 1000K to 3000K and not to 5000K.

Available denominations

Consider how the retailer will make change if the consumer pays with larger bills or coins.   In the example above if 1000K or 2000K were not common bills, a 3000K price would be impractical. Obviously, the easier it is for the consumer to pay or get correct change, the easier it will be for him/her to purchase.

Communicating quality

If the price is too low, people may perceive it to be of inferior quality. This is especially true for categories they are not familiar with (e.g., a safe water product launch in a new market). Think about what else the target can purchase for the same price and use your judgment as to whether this price point connotes quality.

Some common TOOLS for influencing the final retail price include…

- printing the retail price on the packaging,
- advertising the retail price in the media,
- issuing coupons, vouchers or rebates.

Trade Considerations
THINGS TO THINK ABOUT:

2

When setting prices, a common mistake of PSI is to not learn what margins are common within the industry for similar products or services.

- Compare your margins and sales volume/total profit to others in the category for each step in the distribution chain – distributors, wholesalers, retailers, etc.

A margin is the difference between your cost and your selling price. It can be expressed in units or percents. E.G.,

0.12 = buying price
0.15 = selling price
0.03 = unit margin

20% = 0.03 ÷ 0.15 = percent margin

- Compare your margins to other PSI countries in the same region or with similar per capita GDP. Use PSI's 2007 global pricing study and/ or ask your PM or APM in Washington for this information.

Considering the Product's Life Cycle Stage

Sometimes, higher than average margins are set when launching a new product in order to win distribution. Over the years, as the product matures in the marketplace and generates higher volumes, margins can be brought down to average or even lower than average levels.

An example of considerations 1 and 2

When PSI Somaliland launched their Badbaado bed net, they surveyed consumers and the trade to find the optimal price point.

1 With consumers, they used the Van Westendorp method with the following results. The range of acceptable prices fell between the intersections of…

- Too Inexpensive and Expensive at 11,000 SL Sh.

- Too Expensive and Inexpensive at 18,2000 SL Sh.

The optional price point was at the intersection of the Too Expensive and Too Inexpensive lines at 13,300 SL Sh.

Van Westendorp Pricing - Somaliland 4 Regions & IDP

Percent of Respondents / Price (SLSH)

Legend:
- Too Expensive
- Expensive
- Inexpensive
- Too Inexpensive
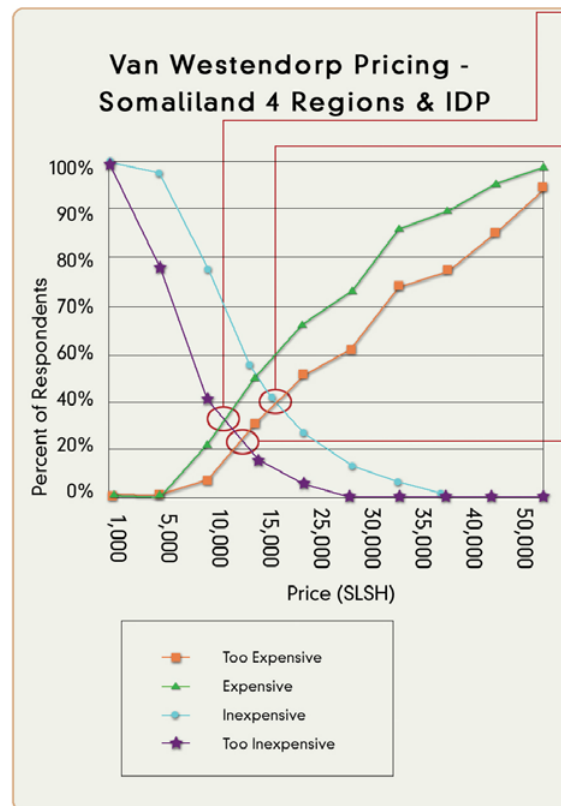
2 For the trade, they asked wholesalers and retailers…
- are they willing to stock the bed net;
- if so, at what price are they willing to purchase it; and
- at what price are they willing to sell it, in order to make a profit and still be affordable to their customers?

Both exercises pointed to a price around 12,000 SL. or USD 2.00.

An additional learning could be that approximately 20% of respondents may not be able to afford this price and could have to rely on free distribution.

Cost Recovery & Marketplace Considerations
THINGS TO THINK ABOUT:

3 Cost Recovery

Although cost recovery is not a main priority at PSI, it needs to be a consideration because:

▶ Prices that are too low, in essence, over subsidize those who are willing and able to pay more.

▶ Spending too much on subsidies means we have less to spend in other program areas, such as IPC outreach or mass media.

▶ Robust cost recovery increases the amount of program income, and, thus, funds available for investment in marketing activities. This can create a 'virtuous feedback loop' as more investment fuels more sales growth (and health impact) which then creates more program income, etc.

▶ Some donors are becoming less and less willing to fund commodity costs, thus, expecting us to cover more and more of these costs ourselves.

▶ Programs that sell their product into the trade channel are usually not tasked with serving the poorest of the poor. That target is more appropriate for public sector or free distribution programs.

Does your program have a cost recovery goal? Below are PSI's four levels of cost recovery.

Level	Description
Level 1	Cost of Goods Sold (COGS)
Level 2	COGS + marketing expenses
Level 3	COGS + marketing expenses + its fair share of fixed program costs
Level 4	COGS + marketing expenses + its fair share of fixed program costs + profit

4 Marketing Dynamics

Compare...

... historical price changes with their accompanying changes in sales volume. Include competitors in such an analysis.

... annual price increases versus changes in inflation and your target groups' income levels.

... your intended retail price versus the actual retail price in various outlets. If the actual price is higher, then you might be selling into the distribution chain at too low of a level. You have either not kept up with inflation or an increasing willingness to pay, and, thus, are missing out on increasing your cost recovery.

In 2007, PSI conducted a global pricing study and found that the gap between our intended retail price and the actual price charged by retailers amounted to a staggering $16,000,000 – more than $13,000,000 of which was from condoms alone.

In other words, had PSI closed that gap by selling into the distribution chain at a higher price, it could have recouped that $16,000,000 and spent it elsewhere. Instead, this money went to the profit margins of distributors and retailers, thus distorting the marketplace and making it more difficult for private sector companies to compete.

Consider this example of PSI Mozambique's launch of their malaria treatment product.

1 CONSUMER CONSIDERATIONS:
Currently, the target, Teresa, pays the following amounts for malaria treatment:

- In public hospitals ➤ 6 Mtn
- For herbal remedies ➤ 20-50 Mtn
- For a traditional healer ➤ 150 Mtn
- In private pharmacies ➤ 130 – 340 Mtn

2 TRADE CONSIDERATIONS:
In Mozambique, trade margins are set by the state, as are fees paid to pharmaceutical importers.

3 COST RECOVERY:
The donor required full recovery of COGS in order that PSI Mozambique may continue purchasing the product on its own.

4 MARKETPLACE DYNAMICS:
This was not applicable as the product had not yet launched.

In the end, a price somewhere in the range of 50-75 Mtn was chosen because it was…

LOW enough	HIGH enough
▸ to be affordable to Teresa; and ▸ to make it attractive versus the opportunity cost of waiting in a long queue at the public hospital. territories…	▸ to connote quality; and ▸ to still recoup the COGS considering the state-imposed trade margins.

Non-monetary Costs

There is an additional Price P concept for social marketers called non-monetary costs. The most common are listed below. Note these are usually addressed as part of other P strategies. For example…

1 Time – e.g., to travel to a clinic
2 Effort – e.g., to remain abstinent
3 Psychological risk – e.g., stigma of getting tested for HIV
4 Physical discomfort – e.g., pain during recovery period of male circumcision

Strategies to Address Each Non-monetary Cost

1 Time

E.G.,
- Extending working days/ hours to weekends/ evening (Product P)
- Increasing mobile outreach (Place P)

2 Effort

E.G.,
- Increase the 'benefit' of abstinence by positioning it as a form of resisting peer pressure. (Brand strategy & Product P)

3 Psychological risk

E.G.,
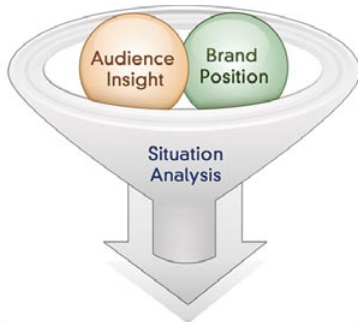- Normalize HIV testing through celebrity endorsements (Promotion P)

4 Physical discomfort

E.G.,
- Change type of pain killers provided to the patient after the procedure (Product P)

Pricing Structure for PSI Mozambique's Malaria Treatment Product

|	COGS	Service Tax	COGS + Tax	PSI Margin	Distributor Price	Distributor Margin	Retail Price	Retail Margin	Consumer Price
USD	1.23	5.0%	1.30	4.4%	1.36	11.7%	1.54	37%	2.45
MTN	34.57	5.0%	36	4.4%	38	11.7%	43	37%	68

Where are we now?

PROMO P STRATEGIES

Summary

Step 1 – Set/confirm communication objectives

Asking the following questions:
1. Which determinants are best suited to the Promotion P?
2. Should you use a branded 'generic' campaign?
3. Which determinants belong in a 'stand alone' message?

Step 2 – Write key message(s)

Where are we now?
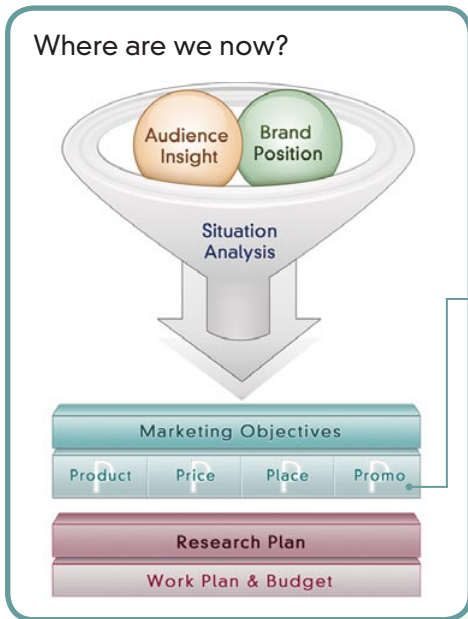
PROMO P STRATEGIES

Summary (cont.)

Step 3 – For each objective choose a tool(s)

The criteria for choosing a tool are:
    1. Ability to reach the target
        a. If the tool reaches your target
        b. How OPEN the target would be to the message
        c. The AMOUNT of Reach the tool would generate among your target
        d. The COMPOSITION of the reach

    2. Cost considerations
        a. Production costs
        b. Placement costs
        c. Human/managerial costs

    3. Creative considerations
        a. How much 'depth' does the message require?
        b. Are you leveraging the creative strengths of the tool?
        c. Are you clear about the role that each communication tool will play
           in your overall plan?

Step 4 – Sync tools with the objectives

Step 5 – Develop detailed strategies and plans   }   Happens after the marketing
Step 6 – Write a communication brief   plan has been completed.

Promotion P is communication planning, which includes six steps:

1 STEP	Set/confirm objectives
2 STEP	Write key messages
3 STEP	Choose the communication tools
4 STEP	Sync the objectives with the tool
5 STEP	Develop detailed strategies and plans
6 STEP	Write a communication brief.

Usually done as part of the marketing planning process

Usually done after the marketing plan has been completed.
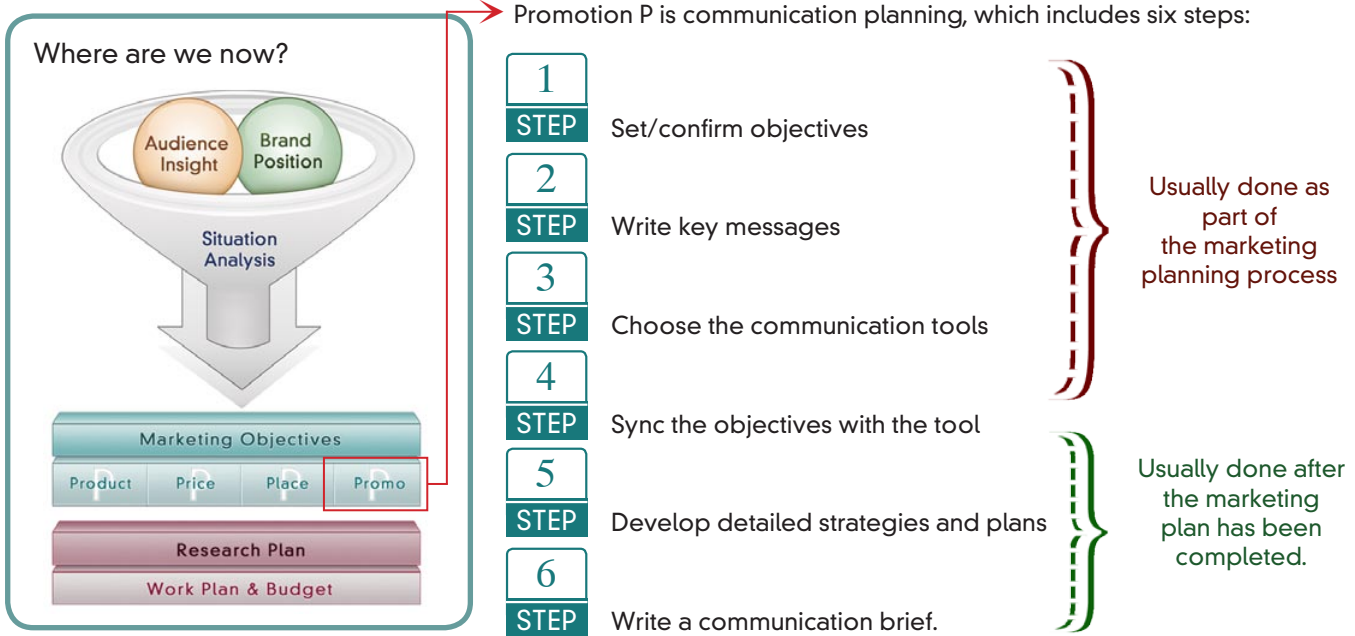
1 STEP   SET/CONFIRM COMMUNICATION OBJECTIVES

You have already identified the behavior you would like to promote and factors that influence that behavior (i.e., behavioral determinants). These decisions are going to provide the basis for your communication objectives.

However, this is a good time to review those decisions by asking yourself the following three questions:

1 STEP **1** 2 3

1. Which determinants are best suited to Promotion P strategies?

Do not automatically default to Promotion P strategies before other P's have been considered and/or ruled out. Consider these examples of marketing objectives and the various P strategies that can be used to achieve them.

MARKETING OBJECTIVE	POSSIBLE STRATEGIES TO ADDRESS IT

Improve Brand Attributes	▶ Product P
	  • Improve the product by adding new features/benefits
	  • Promote new features/benefits on the packaging
	▶ Promotion P
	  • Advertise new features/benefits

Improve Self Efficacy for use of a Product	▶ Product P
	  • Simplify steps required to use the product
	  • Explain these steps on the packaging
	▶ Promotion P
	  • Use IPC to teach skill of using the product
	  • Use media to advertise its 'ease of use'

Packaging strategies are usually considered as part of the Product P, but packaging itself can be a powerful communication tool. Every purchase – indeed, every time a consumer sees your brand at shelf in the store – is an opportunity to communicate the brand's positioning and its high quality.

Too many social marketing projects end up becoming health communication projects because they rely solely or mostly on just the Promotion P. In these instances, the 4P's have been jokingly called Posters, Pamphlets, PSA's and Publicity by some social marketing professionals.

1
STEP
1 **2** 3

2. Should you use a branded campaign that promotes the PSI product/service or a 'generic' campaign that promotes the entire category?

In general, you should separate messages with strong negative emotions from your brand. For example, ads that focus on the severity of HIV/AIDS (i.e., the threat determinant) usually promote condom use in general and not a specific PSI brand. This is because we want only positive emotions associated with our brands.

However, if the sense of threat is not too severe, such as with childhood diarrhea or even malaria, then branded ads can work well.

In general, fear-based messaging is thought to work best when…

- the solution (e.g., use a condom) is provided immediately;
- the target would likely believe they can perform the solution;
- the target is in the Pre-Contemplation stage of change (and the message, thus, is meant to 'wake them up'); and/or
- the message is aimed at an influencer (e.g., a parent or partner) and not the target him/herself.

1
STEP
1 2 **3**

3. Which determinants will you address in a 'stand alone' message and which can be combined with others?

? Is the determinant is simple enough to be combined with another determinant?

For example

DETERMINANT	HOW TO COMBINE IT WITH ANOTHER DETERMINANT
Perceived Availability of a product	Add the tag 'available at a pharmacy near you' onto the end of a Radio or TV spot that addresses another determinant
Outcome Expectations for condoms preventing HIV	If the other determinant were Knowledge that HIV causes AIDS, then these two determinants could easily and logically be combined into one message

? Is it a new message that the target group may not have heard before or is likely to have trouble understanding or believing? Then it might deserve to stand alone.

For example

DETERMINANT	REASON TO ADDRESS AS A STAND ALONE MESSAGE
Outcome Expectations for reducing concurrent partners to prevent HIV	It's a new message for most people and not an easy one to convey simply or quickly.

2
STEP   WRITE KEY MESSAGE(S)

🔑 KEY MESSAGE

…is the idea or belief that the viewer should retain after having been exposed to the communication piece.

…is not the actual text that will appear in the communication piece, but a summary of what that text should convey.

… will be used again in the creative brief to describe the core idea upon which the advertising agency (or internal creative department) will build their concepts.

… addresses your chosen determinant and, therefore, is in addition to communicating your brand positioning. In other words, most communication pieces (posters, TV ads, etc.) will have to convey both the key message and the brand's positioning.

Note: Sometimes this step is done now and sometimes after the marketing plan as part of creative brief development. Some reasons to do it now include…

- *you are planning to use communication tools that can address only one or two determinants at a time (e.g. TV spots or posters and not radio dramas or in-school peer ed programs);*

- *the exercise will help you identify which determinants can be combined into one message; and/ or*

- *the determinant you've chosen is multi-faceted and you want to break it apart into more than one message/objective.*

When writing a KEY MESSAGE...

- Ideally, it should have two components:
  1. a clear call to action, and
  2. a promised **benefit** for performing that action.

Sometimes this benefit will be explicit and sometimes implicit. If you can, try to make it explicit.

KEY MESSAGE

Audience Insight

Situation Analysis

CALL TO ACTION   BENEFIT

It should be driven by audience insight, as with all other marketing decisions. In other words, within the topic of that chosen determinant, you still need an insight that will speak to your target and help you identify a relevant benefit.

- It should always speak to the determinant you have chosen as your communication objective. Think of the chosen determinant as the 'field' on which you have chosen to play.

How to identify that important piece of audience insight?
- There is no one way to do this, as it is more 'art' than 'science'.
- Sometimes, you have to consider all the audience research at the same time, 'triangulating' the data to draw conclusions.
- Other times, you can start with a TRaC study to identify your determinant and then use qualitative data to understand that determinant better.
- Sometimes you will not have qualitative data and must rely on experience with the target group or other secondary research.

2
STEP WRITE KEY MESSAGE(S)

For example

An example from PSI Swaziland for couples HIV testing:

The determinant being addressed was Social Support, which is the assistance that an individual receives to perform a behavior.

Audience Insight **Key Insight**	**Benefit**	**Call To Action**
If you trust your partner, then you have nothing to hide.	Getting HIV tested as a couple proves your love and commitment to each other.	Take your partner to get tested today.

Combined, these comprise the KEY MESSAGE.

Note how the text is not the same as the key message but it conveys the same idea.

Remember, key messages are strategic internal statements. There could be several executions of the same key message.

Tell her something that no one told her before. Baby, let's have that test!

The LOVE TEST — It's not just an HIV test, it's a love test

psi

This is a poster from PSI Swaziland's couples HIV testing campaign. It promoted HIV testing, in general, and not PSI's clinics specifically.

For this reason, the poster did not need to also communicate the brand positioning for PSI's clinics with the key message. Many times, however, you will promote a PSI brand and, therefore, will need to communicate the brand positioning and the key message at the same time. Refer to the example on the following page.

**2
STEP**

Sometimes, the benefit in the brand's positioning can double as the benefit in the key message. In these instances, simple brand promotion is enough. See the example below.

For example

PSI Vietnam wanted to reduce risky sexual behavior among male clients of sex workers (SW). The audience profile for this target group, named Tuan, was presented earlier in the Audience Insight section of the Delta Companion.

- The TRaC identified Threat as a key determinant – specifically the false belief that they would not be at risk for HIV if they did not use a condom with a SW just one time.

- The FoQus study revealed that visiting SW's was a group thing – something friends did together after a night out drinking. In fact, to decline a visit to a SW with one's friends could be interpreted as a sign of disloyalty, not belonging to the group – something Tuan desperately wanted to avoid.

- In response, PSI decided to…
  - address risk perception (i.e., Threat) in a separate campaign in order to keep discussion of HIV apart from their condom, Number One; and
  - position the brand so as to help Tuan be safe when visiting SW's.

Audience Insight — Key Insight	Benefit	Call To Action
• Real friends always stick together during a night out. • Because of this, it's hard to decline visits to a SW.	Number One is Tuan's friend, always part of the group fun and always there 'until the end'. (This is also the brand's positioning).	Always carry Number One with you during a night out.

This key message was developed into billboards and posters that were placed in hotzones where commercial sex took place.

Note the location – a karaoke bar, where Tuan and his friends would go for commercial sex.

Không quên chiến hữu

SỐ 1 LÀ BẠN
BAO CAO SU NUMBER ONE

*Tagline:
You don't leave a friend behind.*

*In corner:
Number One friend.
Number One condom*

2
STEP

Sometimes the benefit in the key message must be presented separately from the benefit in the positioning. In these cases, the determinant in question cannot be addressed through brand promotion alone.

An example

How this will happen is an executional issue and not a strategic issue. Therefore, it does not need to be decided at this stage of marketing planning. Nonetheless, consider the example below from PSI Cambodia.

→ Promoted behavior
Using condoms, in general (i.e. not a specific brand of condoms).

INSIGHT	POSITIONING STATEMENT
Similar to Vietnam, male clients of SWs held conflicting definitions of masculinity. On the one hand, you should be a good husband and father by being responsible. But on the other hand you should also be a good friend by participating in group activities, like visiting SW's.	Using condoms to prevent HIV makes Rithy a real Khmer man because it lets him be responsible and enjoy himself.

→ Determinant to be Addressed
Subjective Norms – the perceived pressure to comply with what an individual believes others in the social group believe about the promoted behavior.

INSIGHT	KEY MESSAGE
Rithy feared that his partner would suspect his health, fidelity or trust in her if he suggested condoms.	When you suggest using a condom, she will trust you even more because she believes you care enough to protect her.

Again, how the positioning and the key message would be communicated together is a decision for later. There are several ways this could happen; the only limitation is your agency's creativity.

Here is one possibility:

○ **MEDIUM**
Place-based print, such as a poster or small billboard

○ **IMAGE**
A loving couple is in an intimate moment and the man has just proposed that they use a condom. Thought balloons show what each is thinking.

• Man: "She's going to think I'm sleeping around on her."
• Woman: "He's just as protective of me as he has always been."

○ **TAGLINE**
"Real Khmer men enjoy life responsibly. Use a condom every time."

Communicates the positioning

3
STEP 1 2 3 FOR EACH OBJECTIVE CHOOSE A TOOL(S)

In development work, communication tools are sometimes grouped into three broad categories, sometimes called channels:

- media,
- interpersonal, and
- community-level activities (e.g., community meetings, street theater or local radio).

Criteria for choosing a TOOL are described below:

1. Ability to reach the target

2. Cost considerations

3. Creative considerations

There is no set formula for weighing each of these criteria and then coming to an answer. Instead, you must 'triangulate' the data – i.e., examine each criterion and then choose the tool(s) that makes the most sense.

1. Ability to reach the target – Ask yourself…

A. Does the communication tool reach your target?

Possible sources for learning this include…

- third party companies like A.C. Nielsen;
- TRaC studies that ask about media consumption; or
- the 'A Day in the Life' exercise from Johns Hopkins.

Provided in the appendix to this section.

B. Is the target open to the message at that moment/through that tool?

Openings are an important concept in communication planning. People are inundated with messages all the time and 'tune out' those they deem irrelevant. Reaching a person when s/he is most receptive can help alleviate that dynamic.

For example

In Zambia, SFH's VCT program wants to attract couples but understands that the man in the relationship has more power and, thus, is the primary decision maker for the couples testing 'purchase decision'. The female, on the other hand, potentially faces more negative repercussions if she were found to be HIV+, such as violence or abandonment.

Importantly, though, SFH believes these power dynamics do change over time, presenting occasional 'openings' during which the promotion of couples testing might be easier. Specifically…

▶ in the beginning of the relationship, power is shared more equally,

▶ after the birth of a child, the male may be more receptive to messages that involve fatherhood and the female, if she tested negative at the antenatal clinic, may be more empowered to broach the subject.

3

STEP
1 2 3

FOR EACH OBJECTIVE CHOOSE A TOOL(S)

1. Ability to reach the target – Continued…

<u>C. What amount of Reach does the tool generate against your target?</u>

> As used here, Reach is a media planning term that refers to the percent of the target audience that is exposed at least once to a given tool, program or message.

Possible sources for learning this include…

- third party companies like A.C. Nielsen;
- TRaC studies that ask about media consumption;
- TRaC studies that measure previous exposure to similar campaigns; or
- Common sense that might indicate if a given tool would reach 'a lot', 'a little' or 'enough - not a lot but also not a little'.
  An example of the last point:
    - If TV is not widely available in your country but radio is, then it can be assumed that radio will deliver more people and TV a smaller and likely urban and higher income audience.
    - Furthermore, radio programs that are clearly designed to appeal to the entire family (e.g., a comedy show) would probably attract a more broad audience (i.e., higher reach) than programs that are clearly targeted to just one member of a family, like a sports show for men or a lifestyles show for young people.

<u>D. What is the composition of the Reach?</u>

? Of the total audience reached, what percent is likely to be within your target group and what percent not?

This is most important if your target is a marginalized group such as MSM or CSW's for whom it would not be appropriate if non-target people were exposed to the message.

However, it's also important in general. Many communication specialists believe that the higher the composition of a particular target to a given communication tool, the greater affinity that target will have towards that tool. And, so the logic goes, the higher the affinity, the more likely the message will be attended to and well received.

> As used here, affinity means a natural predilection for or liking of something.

Effective communication is as much about the messenger as it is the message. Think carefully about who (or what) is delivering your message and whether or not it adds to or detracts from the message's credibility.

For example

- ▶ <u>Traditional healers</u> who advocate for medical male circumcision .... — Messenger with credentials

- ▶ Former or current <u>sex workers</u> doing outreach in brothels — Messenger who can relate to the target

- ▶ A <u>youth-targeted radio station</u> promoting sexual responsibility. — Messenger whose audience has a high composition of the target group

3

STEP
1 **2** 3

FOR EACH OBJECTIVE CHOOSE A TOOL(S)

2. Cost considerations – Consider…

A. Production costs:

- What does it cost to create the communication piece?

- Do you need to create multiple executions of the same message or ad in order to limit message fatigue?

> This happens when the target is over exposed to an ad and then begins to tune it out. Rotating through the campaign different executions of the same message or different length versions of the same ad can avoid this.

- For IPC & community-level activities, include training costs and support materials/ job aids.

B. Placement costs:

- About how much would it cost to run the ad for the duration of the campaign and is that likely to be affordable? Mass media is often expensive to place.

> This is sometimes called the 'out of pocket' cost in order to differentiate it from the concept of efficiency, described below.

  For IPC and community-level activities, this includes implementation and monitoring, which can also be substantial.

- How efficient is the tool? More specifically, what is the CPM or 'cost per 1000 people reached'?

  Cost per thousand, or CPM, is a media measurement term that quantifies the cost incurred by a given communication tool to reach 1000 people. The formula is as follows.

  CPM = Total Cost ÷ Total Impressions (as expressed in 1,000's)

For example

> If a media campaign costs $50,000 and reaches 10,000,000 people, the CPM is $5.00. (50,000 ÷ 10,000 = 5).

CPM's are useful when comparing the cost of various options.

For example

> An IPC program costs $20,000. The IPC program initially looks less expensive than the mass media, but when the number of people reached (2,000,000) is factored in, the CPM is actually double that of mass media ($10).

Of course, it will not always be possible to exactly calculate a CPM because it may be impossible to know how many people the communication tool in question can reach. Nonetheless, there is great benefit in at least estimating an expected CPM in order to facilitate comparison across different tools.

C. Human/managerial costs

For IPC & community-level activities, high quality management & monitoring systems are critical and laborintensive.

3

STEP
1 2 **3**

FOR EACH OBJECTIVE CHOOSE A TOOL(S)

### 3. Creative considerations – Consider…

A. <u>How much 'depth' does the message require?</u>

Some messages require a lot, e.g., teaching a new skill or persuading someone against a deeply held belief. Others require less, such as giving simple knowledge or informing people where they can purchase items.

> Here, depth refers to the amount of time or energy it takes to convey the message.

Mass Media

Community Level

Interpersonal
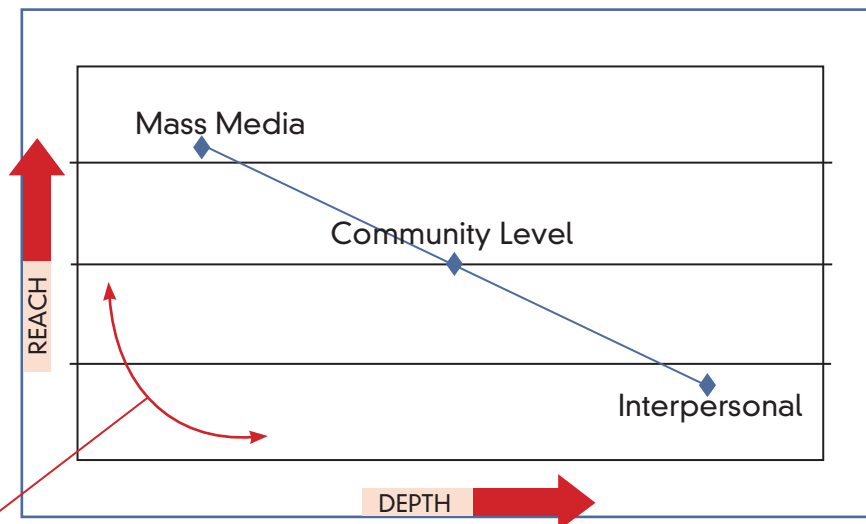
REACH

DEPTH

In general. the more depth a tool provides, the less reach it will have.

B. <u>Are you leveraging the creative strengths of the communication tool?</u>

> Refer to the appendix at the end of this chapter for a description of the strengths and weaknesses of the most common communication tools.

C. <u>Are you clear about the role that each communication tool will play in your overall plan?</u>

When you choose a tool, articulate what you want it to accomplish in simple language. Consider this example from PSI Swaziland's communication plan for male circumcision (MC).

Example

TOOL/CHANNEL	ROLE IN COMMUNICATION PLAN
Mass media	To communicate the benefits of MC by promoting the brand
Delighted clients who have become advocates for MC	To change social norms and increase social support for MC among peers
IPC	To address barriers that are not suited for discussion in media, e.g., pain of procedure, abstinence during healing period, etc.

4 STEP SYNC TOOLS WITH THE OBJECTIVES

This is the step where you begin developing your communication plan. There is no one right design for a communication plan, but here are some guidelines.

Keep the plan as focused as possible.

Less is more, in this case, meaning that the fewer the objectives the better, and the more of the communication plan's 'delivery' that can be applied against one determinant at a time, the better. This leverages resources and maximizes impact.

> In this sense, delivery refers to the number of people who will be reached by the communication plan and the average number of times they will be reached.

Use as many tools as feasible at one time.

This is sometimes called maximizing 'intensity'. The more tools used, the greater the reach that will be generated. In addition, it likely increases the impact of the overall campaign because the same message is delivered in multiple ways and this can facilitate retention and comprehension.

Be sure, though, that each tool contributes a meaningful amount of 'delivery'.

In other words, if you've included several tools in your plan but one tool is not expected to contribute more than 5% or 10% of the total delivery, you have to ask yourself if it's worth it. Does the cost of this particular tool – be it out-of-pocket or CPM – warrant the small delivery it provides?

Leverage 'openings' when the target might be more receptive to your message.

For example, promote birth control to new mothers; advertise condoms near brothels; recruit couples who are about to be married for HIV testing; etc.

Communication Plan

Be sure that the target will be exposed to the messages in your campaign multiple times.

It's generally accepted that a person needs multiple exposures to a message before behavior change will occur, though the exact number is not known. As a rule of thumb, you could aim for at least three exposures per communication tool used.

> This is called Frequency in communication planning.
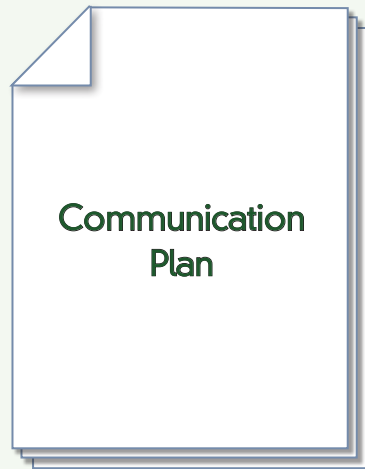
Beware message fatigue.

If you think you will have extended periods of time when the same determinant is being addressed, then be sure to budget for different executions of the same message to be developed.   This includes support materials for IPC activities, such as brochures or flyers.

Consider timing implications.

Are there priority times of the year (e.g., during the monsoon season for safe water products) during which to heavy up?

Consider geographical implications.

Are there priority areas that should receive more delivery (e.g., regions with a higher incidence of malaria)? Will certain parts of the country be 'under-delivered' compared to others (e.g., TV doesn't reach into the mountains)? Use local media or additional IPC/ community-level activities to 'heavy-up' in priority areas or to 'fill in' under-delivered areas.

4
STEP
1 2 3

SYNC TOOLS WITH THE OBJECTIVES

With these guidelines in mind, here are some possible strategic options for the syncing of communication tools with objectives.

1. Focus on only one objective at a time across all the tools. Graphically it could look like this.

	Mo.1	Mo.2	Mo.3	Mo.4	Mo.5	Mo.6	Mo.7	Mo.8	Mo.9	Mo.10	Mo.11	Mo.12
IPC Outreach Radio Ads Billboards	Obj. 1		Obj. 2		Obj. 3		Obj. 1		Obj. 2		Obj. 3	

Advantages:	Disadvantages:
▸ Brings a lot of focus to bear on each objective.	▸ Takes a lot of time to cycle through all the objectives.
	▸ It may not play to the strength of every tool, as different tools will naturally be better suited to different determinants.

Be sure to allow enough time between objectives, especially if IPC is being used. For example, assume an outreach team is using games to communicate its objectives and there are three objectives that will be rotated every 2 months (as in the example above). You must be sure that two months is enough time to design a new game and train up the IPC teams.

4
STEP
1 **2** 3

2. Focus on more than one determinant at a time (i.e., in the same message), and do so at the same time across all tools.

It might graphically look like the chart below, assuming that Objective 1 was of primary importance compared to the other two.

	Mo.1	Mo.2	Mo.3	Mo.4	Mo.5	Mo.6	Mo.7	Mo.8	Mo.9	Mo.10	Mo.11	Mo.12
IPC Outreach Radio Ads Billboards	Objs. 1&2		Objs. 1&3		Objs. 1&2		Objs. 1&3		Objs. 1&2		Objs. 1&3	

Advantages:	Disadvantages:
▸ There is still strong focus because every tool is sending the same message at the same time.	▸ It may not be playing to the strengths of each tool.
▸ Takes less time to cycle through all the objectives.	

4
STEP
1 2 **3**

SYNC TOOLS WITH THE OBJECTIVES

3. Use an 'anchor tool' that can address all the determinants and leave other tools to address the ones best suited to each.

	Mo.1	Mo.2	Mo.3	Mo.4	Mo.5	Mo.6	Mo.7	Mo.8	Mo.9	Mo.10	Mo.11	Mo.12
IPC Outreach					Objs. 1, 2, & 3							
Radio Ads					Obj. 2							
Billboards					Obj. 3							

Advantages:	Disadvantages:
▸ Each tool gets to play to its strength.	▸ Message fatigue could set in unless different executions of the same message are created.

⚠ WARNING! Be sure to allow enough time before the start of a campaign for materials development and pre-testing. Pre-testing is a crucial step that often gets overlooked in the rush to meet campaign deadlines.

PROMOTION P: A Summary

Promotion P, also called communication planning includes six steps:

STEP 1 – SET/CONFIRM OBJECTIVES
Review these decisions by asking the following questions:
1. Which determinants are best suited to Promotion P strategies?
2. Should you use a branded campaign that promotes the PSI product/service or a 'generic' campaign that promotes the entire category?
3. Which determinants will you address in a 'stand alone' message and which can be combined with others?

STEP 2 – WRITE KEY MESSAGE(S)
Three examples of campaigns and their key messages are supplied.

STEP 3 – FOR EACH OBJECTIVE CHOOSE A TOOL(S)
The criteria for choosing a tool are:
1. Ability to reach the target
    a. IF the tool reaches your target
    b. How OPEN the target would be to the message coming at that moment/through that tool
    c. The AMOUNT of Reach the tool would generate among your target.
    d. The COMPOSITION of the reach.
2. Cost considerations
    a. Production costs:
    b. Placement costs
    c. Human/managerial costs – for IPC & community-level activities, high quality management & monitoring systems are critical and labor intensive.
3. Creative considerations
    a. How much 'depth' does the message require?
    b. Are you leveraging the creative strengths of the communication tool?
    c. Are you clear about the role that each communication tool will play in your overall plan?

STEP 4 – SYNC TOOLS WITH THE OBJECTIVES
Follow communication planning best practices & guidelines at this step.

STEP 5 – DEVELOP DETAILED STRATEGIES AND PLANS

STEP 6 – WRITE A COMMUNICATION BRIEF

} Happens after the marketing plan has been completed.

Where are we now?

APPENDICES FOR PROMOTION P

The following appendices are provided:

1. Communication Tools – Advantages & Disadvantages of Each
2. A Day in the Life Exercise

Communication Tools

Advantages & Disadvantages of Each

MASS MEDIA CHANNELS

Communication Activities	Example of Activities	Advantages	Disadvantages
Broadcast (Television or radio at national or regional level)	▶ Public service announcements(PSA's), commercials ▶ Talk Shows ▶ Call in shows (for example, 'ask the expert' shows), contests. ▶ Diaries (reality programming) ▶ Serial dramas ▶ Situation comedies ▶ Magazine or variety shows ▶ Animated cartoons ▶ Music videos ▶ Songs and jingles ▶ Celebrity endorsements.	▶ Range of formats conducive to health messages available, particularly for television. ▶ Can be highly creative ▶ Dramas and comedies can depict behaviors rather than describe them ▶ Reaches a large percentage of the intended audience. ▶ Opportunity for direct audience involvement through call-in shows ▶ Can use local languages and dialects ▶ Comes into the home and can promote family discussion.	▶ Difficult for intended audience to keep or pass on the communication material ▶ Production and air time can be costly (radio less costly than television) ▶ Message may be obscured by commercial clutter.
Print Media	▶ New coverage and advertising in newspapers and Magazines ▶ Direct mail ▶ Decision-making aids for clients and providers ▶ Comic books, photonovelas (a comic book-like form that uses photos to tell a dramatic story) ▶ Pamphlets, fliers ▶ Posters, billboards ▶ Point of sales materials.	▶ Reaches a large percentage of the intended audience ▶ Can cover news more thoroughly than television or radio ▶ Intended audience has the chance to clip, reread, contemplate, and pass along material ▶ Small-circulation papers may take PSA's free of charge.	▶ For literate audience only ▶ News coverage demands a newsworthy item ▶ Larger circulation papers may take only paid ads and inserts ▶ Newspaper exposure usually limited to one day ▶ Keeping up good relations with news media can be time-consuming.
Information and Communication Technology	▶ Internet websites, social media (for example, e-forums, blogs and chat rooms) distance learning ▶ CD-ROM's ▶ Mobile phone programs.	▶ Can reach large numbers of people rapidly ▶ Many formats are available whenever the user wants access ▶ Can instantaneously update and disseminate information. ▶ Can be interactive and user-directed ▶ Can combine the audio-visual benefits of television or radio with the self-pacing of reading.	▶ Many intended audiences do not have access to the internet ▶ Intended audience must search or sign up for information ▶ Newsgroups and chat rooms usually require monitoring.

Communication Tools, continued...

Advantages & Disadvantages of Each

INTERPERSONAL CHANNELS

Communication Activities	Example of Activities	Advantages	Disadvantages
Between providers and clients, teacher and student, parent and child, or among peers	▶ Telephone hotline ▶ Client counseling ▶ Instruction ▶ Informal discussion groups.	▶ Can be more credible because it is face-to- face ▶ Permits dialogue (most participatory form of communication) and responds immediately to the individual ▶ Can motivate, influence, and support.	▶ Can be expensive initially and/or costly to scale up ▶ Reach may be limited ▶ Difficult to keep messages consistent ▶ Requires specific training.

COMMUNITY- BASED CHANNELS

Communication Activities	Example of Activities	Advantages	Disadvantages
Community-level activities, group interaction	▶ Discussion groups, peer support groups, listening groups, workplace groups ▶ Community meetings. ▶ Rallies.	▶ Greater opportunity to use participatory approaches ▶ May have more credibility because trusted local leaders and/or organizations are involved ▶ Enhances sustainability of effort ▶ Can cost little depending on number of participating communities.	▶ Costly to scale up ▶ Low reach compared with mass media ▶ Low frequency ▶ Difficult for intended audience to keep or pass on material (for community media).
Outreach activities by program staff or community members	▶ Community, village-to-village ▶ Household ▶ Peer-to-peer.		
Live performances	▶ Street theater ▶ Puppet shows ▶ Talent shows ▶ Contests (talent, art, or dance).		
Community Media	▶ Community newspapers ▶ Local radio.		

These charts come from Johns Hopkins's Population Reports newsletter from January 2008.

'A Typical Day in the Life...' Exercise

For Identifying Communication Tools That Reach Your Target

This simple tool is useful for identifying opportunities to communicate with target groups. It's especially helpful in countries where secondary data does not exist for this purpose.

Below is an example of a completed exercise.

Target Group:	Adults 18-49	
Time of Day	**Location & Activities**	**Communication Opportunities**
Early Morning	Commuting to work by bus	Billboards
Mid-morning	Office tea break	Worksite activities
Midday	Lunch at canteen in office compound	Worksite activities, radio
Early Afternoon	In office	Radio
Late Afternoon	Tea break in office	Radio
Early Evening	Commuting home	Billboards
Dinner	At home	Radio, television
Late Evening	At home	Radio, television, magazines
Special events (List day, week or month)	Church gatherings, market days	IPC activities, Place-based outdoor
Seasonal opportunities (Harvest time, holiday seasons, etc.)	During holidays, travel to home village by train.	IPC activities, Place-based outdoor

These columns are completed as part of the exercise.

The above exercise is from Chapter 6 Channels and Tools, "A Field Guide to Designing a Health Communication Strategy", Center for Communication Programs, Johns Hopkins, Bloomberg School of Public Health, page 148. The entire manual can be downloaded from: http://www.jhuccp.org/pubs/fg/02/.

Where are we now?

RESEARCH PLAN

Summary

Research planning is the process through which marketers and researchers work together to identify the research studies necessary for each step in the social marketing process.

The research planning process has three steps:

1. Create an indicator table
2. Add information gaps to the indicator list
3. Work with Research to determine necessary studies

There are three types of data that research studies collect:

1. Monitoring Data
2. Evaluation Data
3. Other program-related information

Where are we now?

Research planning is the process through which marketers and researchers work together to identify the research studies necessary for each step in the social marketing process.

- PSI uses research to inform every step of the process from strategic planning through to project evaluation, by providing the data upon which decisions are made.

- Consider your research team to be as much a part of your marketing team as other departments like sales, IPC or communications.

- It is critical that both teams work closely together via regular face-to-face meetings. PSI experience has shown that managing this process by email alone does not work.

- The marketer's role in this process is to…

  » identify and prioritize information gaps that need to be filled, and
  » specify the indicators that need to be measured.

- The researcher's role is to fill the information gaps and measure the indicators.

> An indicator is something you measure in order to monitor the progress of the project, e.g., percent of the target group who perform the promoted behavior or who have high knowledge about the health problem.

The research planning process has three steps:

❶ Create an indicator table

This is an exhaustive list of all the project's indicators in a single table. This will help your researchers develop their study design. It should include…
- logframe indicators,
- other donor driven indicators, and
- any indicators identified by program managers as useful for project management (e.g. behavioral determinants identified in the previous TRaC; exposure measures).

Be sure to…
- include the timing against which the indicator needs to be measured, e.g., annually or before campaign launch;
- specify how the indicator is to be measured (e.g. use last night vs. consistent use in the last 3 months); and
- work with the research department to determine exactly how each question in the TRaC should be worded in order to measure the indicator properly.

Project/Target: Hormonal Contraceptives for Women 15-35 Years			
Indicator/Information Gap	Main Reason for Inclusion	Timing	Study
% of target who report consistent use of hormonal contraception in the last 6 months	Logframe purpose level indicator	Every 2 years	TRaC
% of target who report high self efficacy for discussing contraceptives with a regular partner	Behavioral determinant from baseline TRaC	Every 2 years	TRaC
% of target audience reporting exposure to radio campaign	To identify the efficiency of radio as a communication tool, to determine if campaign is meeting reach target	Immediately after launch of campaign	TRaC-M (or TRaC)
What media can be used to reach the target?	To inform communication plan	Once off – by end Q3	TRaC (or a FoQus study)
Why does the target have such a strong external locus of control?	To inform campaign message development	Once off – by end Q3	FoQus for Marketing Planning or Qualitative Segmentation
What is the level of coverage and quality of coverage of hormonal contraception in the project area?	To inform sales and distribution plan	Every 2 years	MAP

The research planning process has three steps, continued...

❷ **Add information gaps to the indicator list**

As discussed earlier, all throughout the marketing planning process you should keep a running list of information gaps – things you need to know about your target group. Now is the time to finalize that list.

Items on this list can include...

- any unanswered questions from the situation analysis of the marketing plan;
- anything missing from the audience profile that will improve program planning; and
- new insights or hypotheses about the target audience that you want to explore.

The gaps should be listed as questions that either qualitative or quantitative research could answer.

❸ **Work with Research to determine necessary studies**

Many of the indicators and information gaps can be measured/filled with the same study.

Project/Target: Hormonal Contraceptives for Women 15-35 Years			
Indicator/Information Gap	**Main Reason for Inclusion**	**Timing**	**Study**
% of target who report consistent use of hormonal contraception in the last 6 months	Logframe purpose level indicator	Every 2 years	TRaC
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What is the level of coverage and quality of coverage of hormonal contraception in the project area?	To inform sales and distribution plan	Every 2 years	MAP

> **WARNING!**
>
> It is critical that we only conduct research for things we absolutely must know and not for things that are 'nice to know'. Before a study begins, we should understand exactly what type of marketing decisions we will make based upon its results. To this end, we must prioritize what research questions need answering based upon our hypothesis of what we believe the situation to be. We should not think of research as a process that gives us answers, but rather as a way of gaining insight.

There are three types of data that research studies collect.

1. Monitoring Data

Monitoring data includes baseline data (for a new intervention) and trend data over two or more surveys (for an ongoing intervention). It is used to measure these types of data:

2. Evaluation Data

- Collected midway through and/or at the end of an intervention as part of a TRaC survey.

- Includes data on exposure to the intervention as well as behavior and determinant indicators. This is then compared to the baseline data collected in the previous survey.

- The purpose of evaluation data is to assess whether exposure to the PSI intervention has resulted in any change in behavior or determinant indicators.

3. Other program-related information

- During the situation analysis and development of the audience profile, you may have realized that you lack some critical information, e.g….

   ? What are typical life aspirations of my target group?

   ? What are the typical trade margins for my product?

Your research department will use this chart to complete…

- their section of the work plan that is created for this marketing plan (See next section Workplans and Budgets);
- their annual research plan, which is a document they must submit to the regional researcher, health area PI's, and PSI Washington that specifies all the research studies that are to be conducted at a given platform for all health areas and the timing.

Type of Data	Example	Corresponding Logframe Level	Study That Can Collect This Data
Behavior Information	% of households who consistently treated their water in the last three months	Purpose Level	• TRaC
Determinant Information	% of target who feels confident they can talk to their partner about using condoms (Self Efficacy)	Output Level	• TRaC
Activity or Process-related Information	• Number of clients who received VCT • % of target group that was exposed to PSI's media campaign	Activity Level	• TRaC, • Management Information Systems (MIS), • TRaC-M

This is like an abbreviated TRaC – much shorter and quicker to conduct. It is used only to monitor activity level indicators.

Often, the Research Department doesn't manage this. Nonetheless, include it in your data analysis activities.

Be sure to allow enough time for your research. Population based study designs must be approved by…
- your Regional Researcher;
- your health area principal investigator (PI);
- PSI's internal ethical review board; and sometimes also
- a local ethics board.

This can take anywhere from three to six or even 12 months – especially if it is a national survey and the local Ministry of Health is involved.

Where are we now?

WORK PLAN & BUDGET

Summary

The works plans and budget provide concrete management tools to manage implementations. They should answer three questions:

1. Who is responsible for the activities?
2. How should project funds be allocated?
3. When should each type of activity be implemented?

Work Plans most commonly take the form of Gantt charts

The budget is based on the activities and timing set out in the workplan.

Where are we now?

The works plans and budget...

▶ ... provide the concrete management tools by which CR's and senior management can delegate the implementation of activities while maintaining financial and strategic oversight.

This delegation is required more and more in growing and increasingly complex platform operational environments.

▶ ... can inform MBO-setting and performance reviews by providing management with a record of what was supposed to be accomplished versus what actually was.

▶ ... should answer three questions:

1 Who is responsible for the respective activities?

2 How should project funds be allocated in the budget?

3 When should each type of activity be implemented?

Before you can begin making a work plan or budget, some decisions need to be made.

? Can you synchronize your work plan with your budget?

This is recommended because...

- creating budgets is more accurate - i.e., the amounts in the budget will correspond to actual activities;
- monitoring budgets is easier – i.e., when monitoring the work plan you can check if the corresponding budget amount has been spent or not; and
- execution of paperwork such as purchase orders is more accurate because it includes details such as account codes.

? Can you organize your work plan and budget according to the 'implementation units' that will conduct the corresponding activities?

This is recommended because...

- it ensures that key personnel's responsibilities on a project are clear;
- it enables each unit to know exactly how much money has been budgeted for each activity and when those activities need to happen.
- management will better understand how much that unit costs to operate and this will help when developing future budgets.

This could be a health area (e.g., family planning), department (e.g., marketing), or even an individual (e.g., a brand manager).

? Can you delegate responsibility for managing the budget down to the implementation unit level?

This is recommended because it helps develop lower level managers' skills and should ultimately result in better fiscal management.

In other words, it aligns authority with responsibility. As the people closest to where and when the costs occur, they are best placed to make decisions regarding spending.

Work Plans

Gantt charts are a common format for workplans. They are a project planning tool that can be used to represent the timing of tasks required to complete a project. Because Gantt charts are simple to understand and easy to construct, they are used by most project managers for all but the most complex projects.

In a Gantt chart, each task takes up one row. Dates run along the top in increments of days, weeks or months, depending on the total length of the project. The expected time for each task is represented by a horizontal bar whose left end marks the expected beginning of the task and whose right end marks the expected completion date. Tasks may run sequentially, in parallel or overlapping. See the example below.

For example...

As the project progresses, the chart is updated by filling in the bars to a length proportional to the fraction of work that has been accomplished for each task. This way, one can get a quick reading of project progress by drawing a vertical line through the chart at the current date.

Completed tasks lie to the left of the line and are completely filled in. Current tasks cross the line and are behind schedule if their filled-in section is to the left of the line and ahead of schedule if the filled-in section stops to the right of the line. Future tasks lie completely to the right of the line.

Week beginning ...	Person Responsible	Month 1					Month 2				Month 3			
		1	8	15	22	29	6	13	20	27	3	10	17	24
TASKS														
Task 1	JA													
Task 2	JC													
Task 3	FP													
Task 4	JA. JA													
Task 5	JC, FP													
Task 6	JA, JC, FP													
Task 7	JC													

In this example, the part of its bar that lies behind the line marking today's date is not colored in, indicating that Task 2 is behind schedule.

Task 4, on the other hand, is ahead of schedule because the portion of its bar that lies ahead of the date line is colored in.

For team projects, it often helps to have an additional column containing initials which identify the team member responsible for the task.

Constructing a Gantt Chart

- First place any milestones that you may have included in the 'Marketing P's' section of your marketing plan.

- A milestone is the accomplishment of an event that is usually the culmination of one of more tasks. For example, 'launch media campaign' is a milestone that would have resulted from several tasks, such as 'develop creative brief', 'choose winning advertising agency', 'produce ads', etc.

- Milestones are sometimes designated by an upside down triangle ▽.

- Then work backwards from these milestones to establish the timelines for all the tasks leading up to that milestone.

- Only include the most important tasks on your workplan so that there are no more than 15-20 tasks for a given plan. This helps fit everything onto one page, making the 'big picture' of the plan easy to understand. It also makes it easy to change to the plan after it's been reviewed in a monthly or quarterly meeting.

- More complex projects may require subordinate charts which detail the timing of all the subtasks that make up one of the main tasks.

Budget

1 Budget according to the activities and timing set out in your workplan.

2 Ask the managers who will be responsible for a given activity to provide cost estimates for that activity.

3 Include in the budget only those discretionary budget lines that the implementation unit will have authority over. If, for example, the implementation unit in question does not control payroll, then labor should not be included.

For example

▶ Promotion and Advertising.
▶ Information, Education and Communication.
▶ Research.
▶ Consultants.

Note: If your program budgets are not currently organized by implementation unit, your Financial Analyst at PSI/Washington can help you change them. The term they use is 'divisional budget' but the concept can be applied to a department or even an individual.

PSI/ Washington offers long distance and in-country technical assistance to convert your current budgets to divisional budgets.

This is an example of a 1-page summary sheet for PSI India's unbranded condom marketing plan.

We recommend summarizing the key points and decisions from your marketing plan onto one page because...

> it helps to align and focus your team on what they must do and why, and
> it serves as a succinct communication tool for management and other stakeholders.

2009 Marketing Plan   HIV Prevention in India

The prevalence of HIV in Karnataka is among the highest in India. HIV prevalence is higher in the northern districts with an equal hold in urban and rural areas. Northern Karnataka's Devadasi tradition and migration trends help explain the pattern of Karnataka's HIV epidemic, with relatively low risk behaviours in the general population limiting the potential for a widespread epidemic.

High-risk populations, such as FSWs, clients of FSWs, and their regular partners, are characterized by a high number of concurrent sexual partners, and contribute disproportionately to HIV prevalence rates. While the general population HIV prevalence in Karnataka was 1.13%, the prevalence among FSWs was 8.6%. The disparity indicates the important role that sex work plays in HIV transmission.

The format of the summary sheet can vary according to your needs, but at a minimum be sure to include...

← Target audience

Chandru

Chandru is around 30 years old, educated up until middle school, married and living with his wife and extended family in rural Karnataka. He is fun-loving, and likes hanging out with his friends and drinking. His mobile phone is something he cannot do without. He aspires to be a good family man and a respected member of the community.

Chandru enjoys sex and having many partners. He does not distinguish between sex workers and his other non-commercial sex partners. Because Chandru is afraid of getting HIV, he occasionally uses condoms, but only with women who he believes are unsafe (including sex workers). His biggest barrier to getting condoms is the fear of being seen and the consequent stigma and loss of reputation.

In order to help Chandru, PSI is promoting...

← Brand positioning

For Chandru consistent condom use with non-spousal partners makes him be seen as smart and manly while enjoying sex bindaz.

In order to contribute to increased consistent condom use with all non-spousal partners, research has shown that Samastha intervention activities need to work on:

← Objectives

Availability Increase the proportion of clients who report that condoms are available in a place they are comfortable accessing them.

Attitudes Increase the mean score of clients who report they cannot tell the difference between safe and unsafe sexual partners.

With the following marketing strategy...

← Strategies

PRODUCT	PRICE	PLACE	PROMOTION
Samastha's Product for clients of sex workers is the Link Workers, the main point of contact for intervention activities. The project will assess the target audience's perceptions about Link Worker's Brand Personality, Quality and Packaging, and make improvements as necessary.	Price is applied to the non-monetary cost of procuring and wearing condoms. Embarrassment to purchase condoms or be seen with them is the most important Price to Chandru. Marketing activities will promote condom usage as a sign of being smart.	Free distribution condom depot boxes relocated to places within the village where Chandru can access them without the risk of embarrassment.	Key message is based on research and consistent with the Positioning Statement: "Smart men don't try to tell the difference. They use a condom every time." The intervention will use wall paintings, radio, Link Workers, promotional materials in bars, and opt-in mobile phone promotion to reach Chandru.

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Contact: Justin DeNormandie, BCC Advisor, justin@psi.org.vn

PSI DELTA
Social Marketing Planning for Health Impact

Some summaries also include...
- *situation analysis/strategic priorities,*
- *other activities, such as research or capacity building.*