STEP 1: PROVIDE BACKGROUND, PURPOSE AND FOCUS FOR PLAN

Organization/Partners:

1.1 Summarize key *background* information leading to the development of this plan (e.g., loss of native vegetation on shores).

1.2 What is the campaign *purpose*, the intended impact (benefit) of a successful effort (e.g., increased natural habitats for migratory birds and butterflies)?

1.3 What is the campaign *focus,* stated in terms of populations (e.g., residential properties), or solutions(e.g., native plants)?

STEP 2: CONDUCT A SITUATION ANALYSIS

(Identify 2-3 Bullet Points for Each)

## Internal Factors: Organizational Resources, Expertise, Management Support, Internal Publics, Current Partnerships, Distribution Channels

2.1 What internal *strengths* will your plan maximize?

2.2 What internal *weaknesses* will your plan minimize?

## External Forces: Cultural, Technological, Demographic, Natural, Economic and Political/Legal Forces and External Publics

2.3 What external *opportunities* will your plan take advantage of?

2.4 What external *threats* will your plan prepare for?

## Prior and Similar Efforts

2.5 What findings from *prior and similar efforts* are noteworthy, those of yours or others?

STEP 3: SELECT TARGET AUDIENCES

3.1 Describe the *primary target audience* for your effort. Consider variables including size, demographics, values and lifestyle, geographics, related behaviors, and/or readiness to act (e.g., homeowners on Eastern Shoreline engaged in landscaping property and interested in protecting the environment). (SEE WORKSHEET FOR SELECTING TARGET AUDIENCES AT END OF THIS DOCUMENT)

3.2 If you have *additional important audiences* that have influence on your target audience, describe them here, to keep them in mind as you develop strategies. They may end up being messengers or distribution channels (e.g., garden centers and nurseries).

STEP 4: SET OBJECTIVES AND GOALS

## Objectives

4.1 Behavior Objective:

What, very specifically, do you want to influence your target audience to *do* as a result of this campaign or project (e.g., plant native plants)? (SEE WORKSHEET FOR PRIORITIZING BEHAVIORS AT END OF THIS DOCUMENT.)

4.2 Knowledge Objective:

Is there anything you need them to *know*, in order to act (e.g., how to identify native plants at the nursery?)

4.3 Belief Objective:

Is there anything you need them to *believe*, in order to act (e.g., native plants can be beautiful and easier to maintain)?

## Goals

4.4 What quantifiable, measurable goals are you targeting? Ideally, these are stated in terms of *behavior change* (e.g., % increase in sales of native plants).

STEP 5: UNDERSTAND AUDIENCE BARRIERS, BENEFITS & THE COMPETITION

## Barriers

5.1 Make a list of *barriers* your audience has to adopting the desired behavior (e.g., not knowing what plants are native, and that they aren't beautiful.). These may be related to something physical, psychological, economical, skills, knowledge, awareness, or attitudes. (Try for a list of 5-10). (SEE WORKSHEET FOR USING 4Ps TO REDUCE BARRIERS & INCREASE BENEFITS AT END OF THIS DOCUMENT.)

## Benefits

5.2 What are the key *benefits* for performing the behavior that your target audience wants in exchange for performing the behavior (e.g., easier to maintain, landscape is more beautiful, and increased wildlife on property)? This answers the question "What's in it for me?" (Try for a list of 2-3.)

## Competition

5.3 What are the major competing *alternative behaviors* (e.g., planting nonnative plants)?

5.4 What *benefits* do your audiences associate with this behavior (e.g., easier to find)?

5.5 What *costs* do your audiences associate with this behavior (e.g., requires more fertilizing and watering)?

STEP 6: CRAFT A DESIRED POSITIONING

**Write a statement similar to the following, filling in the blanks**.

“We want [TARGET AUDIENCE] to see [DESIRED BEHAVIOR] as [DESCRIPTIVE PHRASE]”

("We want Eastern Shore property owners to see planting native plants on their properties as a beautiful option, one that enhances habitat for wildlife, as well as property value.")

STEP 7: DEVELOP MARKETING STRATEGIES

## 7.1 Product: Goods or Services

7.1.1 What is the *core* product, the major perceived benefit(s), your target audience wants from performing the behavior that you will highlight (e.g., landscape is more beautiful)? (Choose one or a few from those identified in 5.2.)

7.1.2 What is the *actual* product, the features/name for the desired behavior? Refer back to your behavior objective in 4.1 and refine/finalize here (e.g., look for plants that have the native plant tag).

7.1.3 Are there any *tangible objects* that will be included in program and campaign efforts (e.g., tags at nurseries and demonstration gardens)?

7.1.4 Are there any *services* that will be included in program and campaign efforts (e.g., workshops at nurseries on planting native plants)?

**7.2 Price: Fees & Monetary Incentives & Disincentives**

7.2.1 If you will be including tangible objects and services in your campaign, what, if anything, will the target audience have to *pay* for them (e.g., cost of native plants)?

7.2.2 Will there be any *monetary incentives* for target markets (e.g., coupons, rebates for purchasing native plants)?

7.2.3 Will there be any *monetary disincentives* you will highlight (e.g., higher prices for nonnative plants)?

7.2.4 Will you use any *nonmonetary incentives* (e.g., recognition pens and yard signs)?

7.2.5 Will you use any *nonmonetary disincentives* (e.g., website with photos of properties where migratory birds have disappeared)?

**7.3 Place: Making Access Convenient**

As you determine each of the following, look for ways to make locations closer and more appealing, to extend hours, and to be there at the point of decision making.

**7**.3.1 *Where* will you encourage and support your target audience to *perform the desired behavior* and *when*?

7.3.2 *Where* and *when* will the target market acquire any related tangible objects?

7.3.3 *Where* and *when* will the target market acquire any associated services?

7.3.4 Are there any groups or individuals in the distribution channel that you will target to support efforts (e.g., nursery owners and staff)?

**7.4 Promotion: Persuasive Communications: What Will You Say, Who Will Say It, How, And Where?**

### Messages

7.4.1 What key messages do you want your campaign to communicate to target audiences?

### Messengers

7.4.2 Who will deliver the messages and/or be the perceived sponsor?

### Creative Strategy

7.4.3 Summarize, describe, or highlight elements such as logo, taglines, copy, visuals, colors, script, actors, scenes, and sounds in broadcast media.

### Communication Channels

7.4.4 What communication channels will you use?

**STEP 8: DEVELOP A PLAN FOR EVALUATION AND MONITORING**

8.1 What is the *purpose* of this evaluation? Why are you doing **it?**

8.2 *Who* is the evaluation being conducted for? Who will you present it to?

8.3 *What goals* from Step 4 will be measured?

8.4 *What* techniques and methodologies will be used to conduct these measures?

8.5 *When* will these measurements be taken?

8.6 *How* will measurements be reported and to whom?

(SEE WORKSHEET AT END OF THIS DOCUMENT FOR DEVELOPING EVALUATION MEASURES.)

STEP 9: DETERMINE BUDGETS AND FIND FUNDING SOURCES

9.1 What costs will be associated with *product*-related strategies?

9.2 What costs will be associated with *price*-related strategies?

9.3 What costs will be associated with *place*-related strategies?

9.4 What costs will be associated with *promotion*-related strategies?

9.5 What costs will be associated with *evaluation*-related strategies?

9.6 If costs exceed currently available funds, what potential additional funding sources can be explored?

STEP 10: COMPLETE AN IMPLEMENTATION PLAN

**10.1 Sample Implementation Plan**

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| --- | --- | --- | --- |
| **WHAT** | **WHO** | **WHEN** | **HOW MUCH** |
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**10.2 If Conducting a Pilot or Plan Several Phases, Complete a Grid for Each Phase.**

**WORKSHEETS**

1. **Selecting Target Audience**
2. **Prioritizing Behaviors**
3. **Using 4Ps to Decrease Barriers & Increase Benefits**
4. **Potential Evaluation Measures**

**WORKSHEET FOR SELECTING TARGET AUDIENCES**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **1****POTENTIAL TARGET AUDIENCES** | **2****SIZE** | **3****PROBLEM INCIDENCE** | **4****READINESS TO ACT** | **5****ABILITY TO REACH** | **6****AVERAGE SCORE****(From 2,3,4,5)** |
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**1. POTENTIAL TARGET AUDIENCES:** Relative to a campaign Purpose (e.g., Improve Water Quality) and Focus (e.g., Yard Care), brainstorm and then list potential target audiences. A target audience is a segment of a population that has similar characteristics. Potential audiences may be grouped based on one or more variables including demographics, geographics, values and lifestyles, and/or current related behaviors (e.g., homeowners with large lawns).

**2. SIZE:** As a segment of a population, what is the actual or relative size of this segment?

**3. PROBLEM INCIDENCE:** How significant is the contribution that this audience makes to the environmental problem (e.g., shoreline properties or frequency of fertilizing)?

**4. READINESS TO ACT**: How concerned is the target audience with the problem issue/behavior?

**5. ABILITY TO REACH:** Can we identify them and do we have efficient ways to reach them?

**6. AVERAGE SCORE:** This can be a “Weighted Average” to give increased significance to one or more of the items or it can be an “Unweighted Average”, with each aspect considered equally important.

A variety of scales have been used: 1) High, Medium, Low; 2) Scale of 1-10, 1-7 or 1-5. The one used will depend on how much verifiable information is available. In the end, the ideal target audience is one that is (relatively) large, is having a significant impact on the environmental issue, is concerned about that impact, and can be identified and reached efficiently.

**WORKSHEET FOR PRIORITIZING BEHAVIORS**

**TARGET AUDIENCE**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **1****POTENTIAL BEHAVIORS TO RANK** | **2****IMPACT ON THE ENVIRONMENTAL ISSUE** | **3****WILLINGNESS OF TARGET AUDIENCE TO DO THIS BEHAVIOR** | **4****SIZE OR % OF MARKET NOT DOING THE BEHAVIOR** | **5****AVERAGE SCORE****(2,3,4)** |
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**1. POTENTIAL BEHAVIORS TO RANK:** Relative to a campaign Purpose, Focus, and Target Audience, brainstorm and then list potential single, simple behaviors to influence (e.g., replace half of lawn with native plants).

**2. IMPACT ON THE ENVIRONMENTAL ISSUE:** What do scientists, technical staff and/or engineers evaluate the potential that this desired behavior will have on the environment relative to other behaviors (e.g., use natural vs. chemical fertilizers vs. reduce lawn in half).

**3. WILLINGNESS:** How willing is the target audience to do this? In the diffusion model, this would be the % or number who are in the *Help Me* group vs. the *Show Me* or *Make Me* Group.

**4. SIZE OR % OF MARKET NOT DOING THE BEHAVIOR**: Estimate the % and/or number of people in the target audience/population who are not already doing the behavior (NOTE: The higher the number the higher the score.)

**5. AVERAGE SCORE:** This can be a “Weighted Average” to give increased significance to one or more of the items or it can be an “Unweighted Average”, with each aspect considered equally important.

A variety of scales have been used: 1) High, Medium, Low; 2) Scale of 1-10, 1-7 or 1-5. The one used will depend on how much verifiable information is available.

**(Adapted from Doug McKenzie-Mohr)**

**WORKSHEET FOR USING THE 4 PS TO**

# REDUCING BARRIERS & INCREASING BENEFITS

**Desired Behavior:**

**Target Audience:**

|  |  |
| --- | --- |
| **For each of the target audience perceived barriers and potential benefits, consider whether one or more of the 4Ps would help reduce the barrier and provide desired benefits** | **POTENTIAL STRATEGIES USING THE 4PS****TO REDUCE BARRIERS & INCREASE BENEFITS** |
| **PERCEIVED BARRIERS TO DESIRED BEHAVIORS** | **PRODUCT****(Goods or Services to Promote or Help do Behavior)** | **PRICE****(Incentives and Disincentives)****(Includes use of pledges and commitments)** | **PLACE****(Where access goods and services of perform behavior)** | **PROMOTION****Messages,** **Messengers, Creative Elements, Communication Channels****(Including use of prompts)**  |
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| **DESIRED BENEFITS** |  |  |  |  |
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**WORKSHEET FOR POTENTIAL EVALUATION MEASURES**

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| --- | --- | --- | --- | --- |
| **INPUTS** | **OUTPUTS** | **OUTCOMES** | **IMPACT** | **RETURN ON INVESTMENT** |
| *Resources allocated to the campaign or program effort:** Dollars
* Incremental staff time
* Existing materials
* Existing distribution channels
* Existing partners
 | *Program activities conducted to influence a desired behavior. These measures do not indicate whether the audience "noticed" or responded to these activities. They only represent what was "put out there" including:** Number of materials disseminated
* Number of calls made
* Numbers and types of distribution channels for any products or services
* Number of events held
* Web sites created/utilized
* Social media tactics
* Reach and frequency of communications
* Free media coverage
* Paid media impressions
* Implementation of program elements (e.g., whether on time, on budget)
 | *Audience response to outputs including:** Changes in behavior
* Changes in numbers of related products or services "sold" (e.g., native plants)
* Changes in behavior intent
* Changes in knowledge
* Changes in beliefs
* Responses to campaign elements (e.g., hits to a Web site)
* Campaign awareness
* Customer satisfaction levels
* Policy changes
* Partnerships and contributions created
 | *Indicators that show levels of impact on the social issue that was the focus for the effort:** Water quality improved
* Wildlife and habitats protected
 | *Economic value of changes in behavior and the calculated rate of return on the spending associated with the effort:** For every dollar spent, dollars saved or generated
* After subtracting expenses, what is the rate of return on the investment
 |
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