



## TOOL D13 Commissioning social marketing

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D13

<b>For:</b>	Commissioners in primary care trusts (PCTs) and local authorities
<b>About:</b>	This tool provides details on how to commission a social marketing agency. It provides a checklist for assessing an agency and sample interview questions with answers which can be used when interviewing social marketers.
<b>Purpose:</b>	To provide local areas with information about the key issues relating to procuring a social marketing agency.
<b>Use:</b>	<ul style="list-style-type: none"> <li>• Should be used in planning social marketing interventions.</li> <li>• Should be used in commissioning social marketing agencies.</li> <li>• Can be used as an assessment tool when interviewing agencies.</li> </ul>
<b>Resource:</b>	National Social Marketing Centre (NSMC): <a href="http://www.nsms.org.uk">www.nsms.org.uk</a>

If commissioners decide to procure a social marketing agency to support their programme, then they should ensure that the correct procurement procedure is put in place when approaching social marketing agencies. (See **Tool D11** – *Guide to the procurement process*.)

This tool provides an evaluation checklist for assessing social marketing agencies and some sample interview questions (with robust responses). These have been developed by the National Social Marketing Centre (NSMC) in order to assist local areas in the process of commissioning a social marketing agency.

### Assessing social marketing agencies – a checklist

Essentially, a social marketing agency tendering for programme work should be able to demonstrate:

- a clear understanding of social marketing
- experience of social marketing, especially in the health sector
- a clear approach to a social marketing commission, based upon the National Benchmark Criteria<sup>201</sup>
- sound company history
- adequate capacity – such as personnel and infrastructure
- capability of delivery
- financial competence.

To assess the suitability of an agency tendering for social marketing work more comprehensively, the following checklist can be used by commissioners.

Checklist for agency	Yes	No	Unsure	Action
Can the agency demonstrate a clear understanding of the project's objectives and broader strategic goals?				
Can the agency provide examples of clear strategic planning, monitoring and evaluation of past projects?				
Is the agency suggesting clear indicators to demonstrate return on your investment? These may include relevant measures to demonstrate influence on behaviour, awareness, attitudes, or other relevant process or interim measures such as evidence of stakeholder engagement.				
Can the agency demonstrate an ability to understand your research needs? Have they insisted that all secondary data be utilised before undertaking new market research at local level?				
Can the agency provide evidence of genuine stakeholder engagement, partnerships, and collaborative delivery?				
Is the agency proposing that local delivery staff be involved in the development and support of the programme?				
Has an adequate budget been allocated for each stage of the proposed social marketing intervention?				
Is there evidence that the agency can customise a solution to meet a specific challenge rather than simply repeating a similar approach they have used elsewhere?				
Can the agency demonstrate an ability to use research techniques to segment, target and design interventions that meet the needs of distinct target audiences?				
Has the agency offered promotional freebies, materials, or discounts before demonstrating a clear understanding of the strategic objectives and the specific needs of the target audience the project hopes to reach?				
Is the agency considering a multi-pronged approach that considers a mixture of interventions to enhance customer benefits or achieve policy and environmental objectives?				
Is the agency clear about the consequences of failing to deliver (for example, built-in penalty clauses)?				

## Sample interview questions for interviewing social marketers

The National Social Marketing Centre has developed eight questions to assist commissioners when interviewing agencies bidding for social marketing projects. Examples of robust responses have also been given. The National Benchmark Criteria<sup>201</sup> can also be used to help guide the interview process. Go to the National Social Marketing Centre website at [www.nsms.org.uk](http://www.nsms.org.uk)

Question	Answer
Explain to us what social marketing is and how it can help us at a local level.	<p>In formal terms, social marketing has been defined as <i>'the systematic application of marketing, alongside other concepts and techniques, to achieve specific behavioural goals, for a social good'</i>.<sup>202</sup> This definition highlights the systematic nature of social marketing, while also emphasising its behavioural focus and its primary concern with a 'social good'.</p> <p>Social marketing has been used successfully in a variety of local interventions. [At this point a competent company should be able to talk about a social marketing case study, and discuss lessons learnt from the example. The case study may be international, as the British evidence base is still in its infancy.]</p>
Social marketing is a staged and systematic process. Please take me through the different stages of the social marketing process.	<p>Successful social marketing programmes reflect a logical planning process, which can be used at both individual and strategic policy development levels. The total process planning model (see <a href="http://www.nsms.org.uk">www.nsms.org.uk</a>) is a simple conceptualisation of the process, which in practice can be challenging to action. The key stages are:</p> <ul style="list-style-type: none"> <li>• scope: examine and define the issue</li> <li>• develop: test out the proposition and pre-test, refine and adjust it</li> <li>• implement: commence interventions/campaign, and</li> <li>• evaluate: impact, process and cost assessment.</li> </ul> <p>The emphasis is placed on the 'scoping stage' of the model and its role in establishing clear, actionable and measurable behaviour goals to ensure focused development across the rest of the process. Although the model appears linear, people's needs, wants and motivations change over time so it is important that follow-up is conducted to make sure the needs of the consumers are still being met by the intervention.</p>
How long does the scoping to development phase usually take?	<p>It can depend on a variety of factors, such as ease of recruitment from the target audience for the qualitative research, etc. However, scoping done thoroughly usually takes between two and four months. The development phase usually takes around the same amount of time. However, again, this can depend on various factors – for example, on how many times the intervention needs to be pre-tested and refined before it is ready to roll out.</p>
How involved will the primary care trust/strategic health authority be in the social marketing process?	<p>We hope that the PCT/SHA will be heavily involved in the scoping and the development phases of the social marketing process. From our experience local employees sit on vast amounts of invaluable local knowledge. We attempt to harness this knowledge by interviewing key stakeholders during the scoping phase. We also hope that the PCT/SHA will wish to be involved in all four stages of the social marketing process.</p>
Talk me through what you plan to do in the scoping phase and why.	<p>During the scoping phase we will map the issue we are addressing (using epidemiological/prevalence data) and try to build up a detailed psychographic picture of the target audience – what their current behaviour is, their attitudes, values, etc. This mapping exercise will be completed using secondary data (both national and local). Where there are gaps in the existing data, these will be filled by collecting qualitative data at the local level.</p> <p>During the scoping phase the following actions will also be completed: a review of past interventions – what has worked/ what did not work nationally and locally; a competition analysis; a policy review – how the topic area/target audience fits into the current political climate; audience segmentation; and interviews with key stakeholders.</p>

Question	Answer
<p>What research methods do you think would be applicable for understanding the target audience?</p>	<p>It really depends on who the target audience is. Often qualitative methods, such as focus groups and individual interviews, if performed in a robust manner, can provide useful insight. However, sometimes these commonly employed methods are not suitable for certain audiences. In some cases, using ethnographic techniques to collect the data may prove more insightful. (Ethnography is a method of observing human interactions in their social, physical and cognitive environments.)</p>
<p>How would you evaluate the intervention and at what stages in the process?</p>	<p>It is important to think about evaluation during the scoping phase of the process and that a clear behavioural baseline is identified early on. Qualitative research can be used when undertaking a process evaluation which might involve speaking to members of the project team, stakeholders and users to see how the intervention is currently doing – with the option of adaptation if needed. Other forms of evaluation can include quantitative analysis looking at the uptake of a particular service, or how satisfied customers were with it. Media evaluation is another form of assessing the effectiveness of campaigns. This can involve an analysis of press coverage. Budget and time permitting, it may be advantageous to run a control group to compare against, to assess the effectiveness of a particular intervention.</p>
<p>What do you think the intervention will be?</p>	<p>Until we have conducted the scoping phase, it is not possible to know what the intervention will be and how much it will cost exactly. However, it is most likely that the intervention will be multi-faceted and build on existing good services and work that is currently being done in the local area.</p>