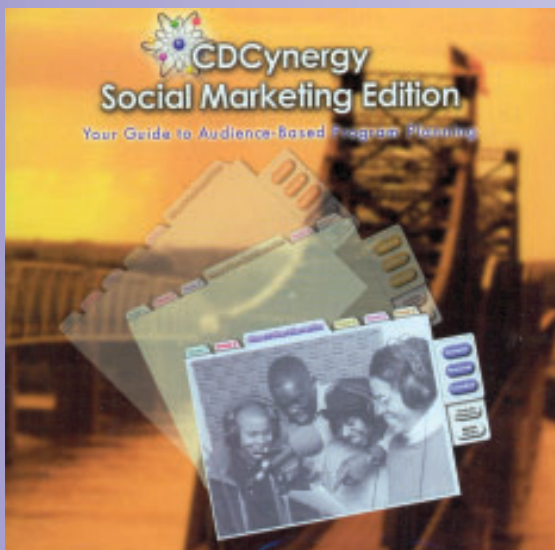# CDCynergy-Social Marketing Edition

One-Day Workshop

PARTICIPANT WORKBOOK

Created by the
Academy for Educational Development
and the
Turning Point Social Marketing
National Excellence Collaborative

November 20, 2004

TurningPoint

Collaborating for a New Century in Public Health

CDC

CENTERS FOR DISEASE
CONTROL AND PREVENTION

AED·

Academy for Educational Development

Table of Contents

Overview of the *CDCynergy—SOC* One-Day Workshop

Overall goal of the workshop

You will have a general understanding of the structure and content of *CDCynergy-SOC* and be able to use it on your own in your work environment.

Learning objectives of the workshop

By the end of this training, you will be able to:

- Identify how to find additional software that may be required to use the CD-ROM.

- Name 3 social marketing concepts and locate information about them on the CD-ROM.

- Identify the major features of the CD-ROM.

- Locate the Glossary, Index, Primer for Managers, and FAQs on the CD-ROM.

- Name and navigate the *CDCynergy-SOC* Phases and Steps.

- Navigate between Phases and Steps, My Model and My Plan.

- Navigate between Phases and Steps, Examples, Tools for Research, Consultant Videos and other links.

- Navigate the Media Library and the Resources database to identify one resource per phase on the CD-ROM.

CDCynergy—Social Marketing Edition One-Day Workshop

Agenda

8:30 am – 5:00 pm

8:30-8:50	Introduction
8:50-9:00	Check computers to run *CDCynergy-SOC*
9:00-10:15	Social Marketing Overview Exercise 1: Is Social Marketing for Me? Exercise 2: Defining Key Social Marketing Concepts
10:15-10:30	**BREAK**
10:30-10:50	Overview of CD-ROM Jeopardy break
10:50-12:00	What's in this Tool: Phases 1 and 2 Exercise 3: Navigating Phases 1–2
12:00-1:00	**LUNCH**
1:00-2:00	Jeopardy break What's in this Tool: Phases 3 and 4 Exercise 4: Navigating Phases 3–4 Exercise 5: Creating Your Model
2:00-3:00	Jeopardy break What's in this Tool: Phases 5 and 6 Exercise 6: Navigating Phases 5–6 Exercise 7: Creating Your Social Marketing Plan
3:00-3:15	**BREAK**
3:15-4:15	Jeopardy break Sharing Your Plan & Feedback on Tool Sharing MVPs
4:15-4:45	Don't Leave without Asking…
4:45-5:00	Wrap-up

Instructions for Installing *CDCynergy–SOC*

1. Insert the CD-ROM into your CD-ROM drive.

2. Click *Install CDCynergy-SOC to my hard drive.*

3. Click *OK* to save the program to your C:/ drive in the Program Files folder. You will see a dialogue box with the heading *Copying files, please wait…*

   Note to user: You may select another drive to save the program by clicking the down arrow under *Drives:* Once you've chosen the appropriate drive, you may make a new folder by clicking *New*, typing in the new folder name and clicking *OK.* Then click *OK* again to start saving the program.

4. From now on, you will be able to run the program by double clicking the icon on your desktop labeled *CDCynergy-SOC*.

5. You will want to check your settings to be sure you can run the program fully; follow the instructions on page 4 of this Workbook. At the bottom of the opening page, click *Computer Settings Guide.* Follow the instructions on your screen. If you do not have an Internet connection, install any needed software from the CD-ROM by following the instructions on your screen. This will not work on Apple® computers.

To order more copies of the CD-ROM, go to:

www.turningpointprogram.org/Pages/socialmkt.html

Instructions for Running *CDCynergy–SOC* from the CD-ROM

1. Insert the CD-ROM into your CD drive.

2. Click *Run from the CD-ROM.*

3. Click *Yes* to start running *CDCynergy-SOC*. The program runs using your Internet browser (Microsoft Internet Explorer or Netscape Navigator).

4. *CDCynergy-SOC* requires your computer to have certain software in order for all its features to run properly. Check that you have the necessary software on your computer to run *CDCynergy-SOC*:

5. At the bottom of the opening page, click *Computer Settings Guide.* Follow the instructions on your screen.

6. If you do not have an Internet connection, install any needed software from the CD-ROM by following the instructions on your screen.

Instructions for Running *CDCynergy–SOC* from the hard drive

1. Install the CD-ROM onto your hard drive using directions on previous page.

2. From your desktop, double-click on the *CDCynergy-SOC* icon.

3. Click *Yes* to start running *CDCynergy-SOC*. The program runs using your Internet browser (Microsoft Internet Explorer or Netscape Navigator).

4. *CDCynergy-SOC* requires your computer to have certain software in order for all its features to run properly. Check that you have the necessary software on your computer to run *CDCynergy-SOC*:

5. At the bottom of the opening page, click *Computer Settings Guide.* Follow the instructions on your screen.

6. If you do not have an Internet connection, install any needed software from the CD-ROM by following the instructions on your screen.
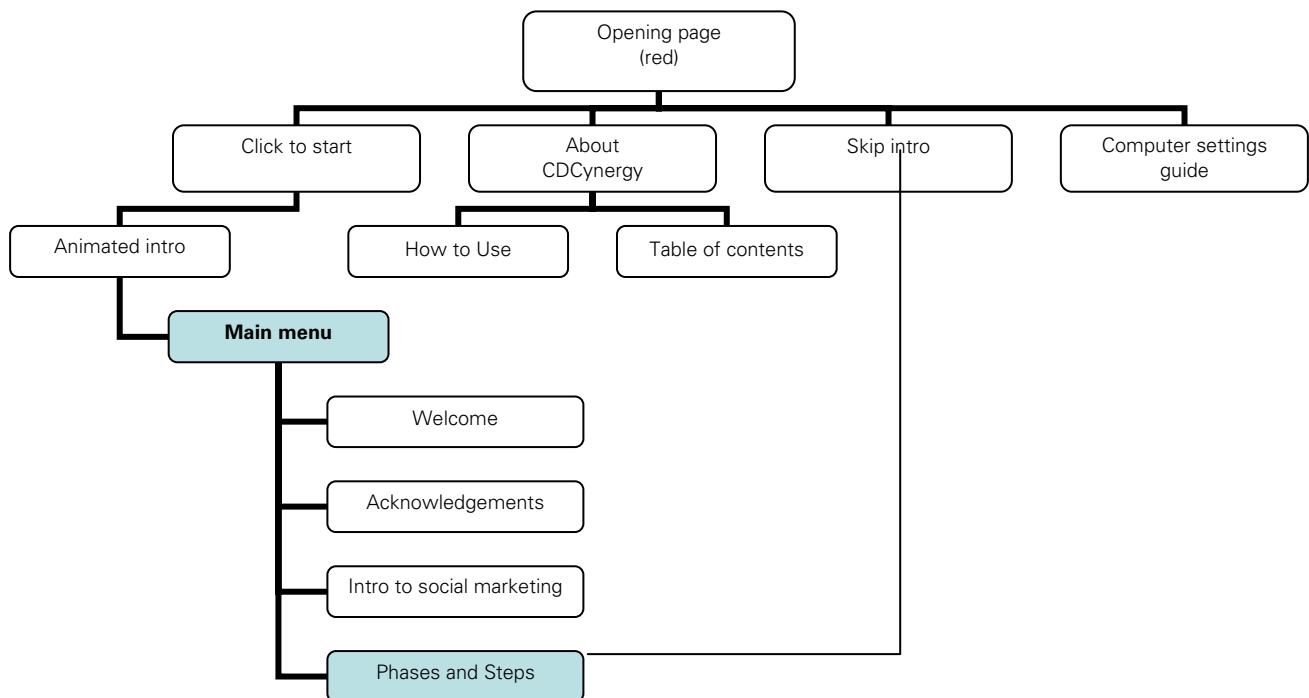
Key Windows on the CD-ROM

Instructions for viewing the *Introduction to Social Marketing* window

You can access several items from this window that help orient you to the social marketing program planning process.

1. From the opening page, click on *Click to Start.*

2. Click *Skip* if you would like to skip the slide show that starts to play. You will see the Main Menu.

3. From the Main Menu click *Introduction to Social Marketing*.

4. Click *Introduction to Social Marketing*

5. Click *Approaching the Social Marketing Edition*

6. Click on hyperlink for *How to Use the CDCynergy-Social Marketing Edition*

Note to users: Audio and video clips included on this CD-ROM come from a variety of sources. Consequently, you may need to adjust the volume each time you play an audio or video clip.

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        │ Acknowledgements │
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        │ Phases and Steps │
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Exercise 1: Is Social Marketing for Me?

1. From the Introduction to Social Marketing window, click Is Social Marketing for You?

2. Follow slides 3-12, along with your trainer.

3. When prompted, find a partner and the group will count off in threes.

4. Work with your partner to complete the exercise below that corresponds with your number. Be prepared to walk the group through the slides and share your answers to the corresponding questions.

#1: Maximizing Your Data

Go to slide 13. It asks you to consider, given this data, the type of behavior change program your agency might plan to influence target audience members to use condoms. Choose an option from slide 14 and enter your response here:

Slide 14 (Circle one)　　**1**　　　**2**　　　**3**　　　**4**　　　**5**

Slide 15 contains another data point that reveals a little more about your target audience. If presented with both these data, a social marketing program planner would be prompted to ask the question on the slide: "Why?"

Slides 16 and 17 contain more revealing data about target audience members who already use condoms and those who don't. Based on all the data you have now, what type of strategy would you suggest for the program?

Read slide 18. How does this reflect or compare with what you would have done?

How would you explain what it means to "Maximize Your Data?"

Be prepared to lead your classmates through the slides you've just viewed and share your responses.

#2: Going Beneath the Surface

Go to slide 19. Which picture do you think bothered members of a Native American target audience? Why?

Read slide 20. What, if anything, surprises you about the answer?

Social marketers and federal public health officials were working together on a campaign to influence working mothers to call to get information about state child health insurance programs. Slide 21 shows one picture they tested with target audience members.

Read slides 21-23. How could this concept of *Going Beneath the Surface* be important to apply to your current or recent behavior change project(s)?

Be prepared to lead your classmates through the slides you've just viewed and share your responses.

#3: Expanding the Toolbox

Go to slide 24. Read slides 24-28. They discuss the impact of a knowledge campaign to prevent Sudden Infant Death Syndrome in the Netherlands and New Zealand.

Read slides 29-31 for a discussion about why the Got Milk™ campaign was initially unsuccessful. The press release on slide 31 details the findings of milk producers' subsequent research. They found that strategies such as offering cross-product promotions (e.g., milk-and-donut promotions) and conveniently locating serving-sized containers of milk in stores significantly affected sales.

Read slide 32. How does the Got Milk™ campaign exemplify the concept of Expanding the Toolbox?

How could you use social marketing to expand the toolbox used in your current or recent behavior change project(s)?

Be prepared to lead your classmates through the slides you've just viewed and share your responses.

Exercise 2: Defining Social Marketing Concepts

1. Select a Social Marketing card from the deck your facilitator is holding.

2. Get up and find your partner who has the term that matches your definition, or vice versa.

3. Be prepared to share your term and definition with the group.

Using the *CDCynergy-SOC*, navigate through the first three phases using the instructions below.

Phase 1

Return to Phase 1 of the Phases and Steps.

Read through the steps of Phase 1 and find examples of types of data and sources of data that are new to you. Create a list as needed.

Following links and clicking on **Consultants, Resources**, and the case **Examples**, continue to add to your list.

Types of Data   *Sources of Data*

Phase 1

Go to step 1.5. What is this step describing when it uses the term "upstream"? What are some examples of upstream factors to a health problem?

Continue this exercise on the next page>>>>

Phase 2

Return to Phase 2.

Read through step 2.1. List some examples of "competition."

☐...

☐...

☐...

☐...

☐...

Phase 2

You can explore the use of focus groups in this phase. Read steps 2.2 and 2.3. Follow the links for conducting focus groups.

Click on the **Tools for Research** and find additional information and resources about focus groups. List some of the pros and cons that you read about for focus groups of various types and settings:

Pros for conducting focus groups	*Cons*

Exercise 4: Navigating Phases 3 and 4

Using the *CDCynergy-SOC,* navigate through these two phases using the instructions below.

Phase 3

Search this phase for instructions on how to do audience segmentation. What are some of the ways to segment an audience? List what you find below.

Hints: Here are a few places to start:

Step 3.1

Phase 3 Consultant video: Bill Smith

Steps 1.2 and 2.1 and follow the hyperlinks for audience segmentation.

Ways to Segment an Audience:

☐ ....

☐ ....

☐ ....

☐ ....

☐ ....

Phase 3 (continued)

Read step 3.2. What are the 5 considerations you can use to narrow your audience and behavior options?

Ways to Narrow Audience/Behavior Selection:

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☐

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Go to step 3.3. What are the 4 T's of branding?

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☐

☐

Phase 4

Go to Phase 4.

What are SMART objectives?

S

M

A

R

T

Write an example of a SMART objective for a service:

_____

_____

Using Phase 4 steps, links, Examples, and Resources, locate and list some of the information that you can use for estimating costs or creating a budget for your program.

Cost/Budget Resource   **Where Located**

Exercise 5: Creating your Model

Find a partner.

With your partner, select one of the problem statements below:

- School children do not eat the recommended number of fruits and vegetables each day.
- Women in Medicare do not get their recommended pap smears and mammograms.
- The number of Americans who are obese is increasing annually.

Working in *CDCynergy-SOC*, open up **My Model** (the link at the top right of your screen).

Using **My Model**, make decisions on how you would address the problem you selected. Return to the CDCynergy-SOC steps as needed for more guidance on the decisions you are asked to make.

You have 15 minutes to work on your model.

When you are done, save and print out your model.

Using the *CDCynergy-SOC*, navigate through the last two phases using the instructions below.

Phase 5

Return to Phase 5.

Read step 5.1 for background on how to decide what information to collect during monitoring and evaluation.

Next, read through one of the case Examples and list the indicators or types of information these programs used to monitor and evaluate their program.

Example	Process Indicator Used	Outcome Indicator Used

Phase 6

Starting in Step 6.1, search this phase for resources and materials that can help you issue RFPs and subcontract services for your new program. Follow links and check the Resources for additional information. Jot down where some of this information can be found.

Contracting Information	Where to Find It

Exercise 7: Creating Your Social Marketing Plan

Pair again with your partner from Exercise 5: Creating Your Model.

Your trainer will assign a phase for you to work on.

Working in *CDCynergy-SOC*, open up **My Plan** (the link is at the top right of your screen).

Using **My Plan**, and continuing the line of thinking you used to create your model, work with your partner to put in a sentence or two on how you would create the program using the social marketing approach in *CDCynergy–SOC,* for each step of the phase you are assigned. If you don't have enough information to complete a step, write in what questions you have or what type of information you would need. Return to the *CDCynergy-SOC* steps as needed for more guidance.

You have 20 minutes to work on your plan. Complete the steps as time allows. Make any notes of Resources or other supplemental tools you use and any helpful information you identify.

When you are done, save and print out the phase of your plan you completed. Be prepared to present your ideas to the larger group after the break.

CDCynergy-Social Marketing Edition Process Steps	
Phase 1: Describe the Problem	
Step 1.1	Write a problem statement.
Step 1.2	List the causes of the health problem and identify potential audiences.
Step 1.3	Identify models of behavior change and best practices.
Step 1.4	Form your strategy team.
Step 1.5	Conduct a SWOT analysis.
Phase 2: Conduct Market Research	
Step 2.1	Define your research questions.
Step 2.2	Develop a market research plan.
Step 2.3	Conduct and analyze market research.
Step 2.4	Summarize research results.
Phase 3: Create the Marketing Strategy	
Step 3.1	Select your target audience segment(s).
Step 3.2	Define current and desired behaviors for each audience segment.
Step 3.3	Describe the benefits you will offer.
Step 3.4	Write your behavior change goal(s).
Step 3.5	Select the intervention(s) you will develop for your program.
Step 3.6	Write the goal for each intervention.
Phase 4: Plan the Interventions	
Step 4.1	Select members and assign roles for your planning team.
Step 4.2	Write specific, measurable objectives for each intervention activity.
Step 4.3	Write a program plan, including timeline and budget, for each intervention.
Step 4.3a	Plan new or improved services.
Step 4.3b	Develop or adapt a product.

Step 4.3c	Plan a strategy for policy change.
Step 4.3d	Plan communication intervention/promotion activities.
Step 4.4	Pretest, pilot test and revise as needed.
Step 4.5	Summarize your program plan and review the factors that can affect it.
Step 4.6	Confirm plans with stakeholders.
Phase 5: Plan Program Monitoring and Evaluation	
Step 5.1	Identify what information needs to be collected.
Step 5.2	Determine how the information will be gathered.
Step 5.3	Develop a data analysis and reporting plan.
Phase 6: Implement the Interventions and Evaluation	
Step 6.1	Prepare for launch.
Step 6.2	Execute and manage intervention components.
Step 6.3	Execute and manage the monitoring and evaluation plans.
Step 6.4	Modify intervention activities, as feedback indicates.

Note to user: These pages can be downloaded from the CD-ROM. Select "Introduction to Social Marketing," then select "Phases and Steps"

Most Valuable Places

Nifty things I found on the CD-ROM that I want to remember:

Help! I Can't Find It

(And other questions I want answered):

www.turningpointprogram.org

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