

BEHAVIOR CHANGE MARKETING

in SIX STEPS

First, a quick review: Our goal is to change behavior. A behavior is an observable action taken by a specific segment of the population. Once you have a behavioral goal, your job is not to tell people what to think, but to help them do your target behavior. You need to offer them something they want and connect that with your behavioral objective. In general, you want to make your target behavior more fun, easy or popular.

Simple, no?

Simple to say. Tougher to execute.

What follows is an attempt to make it a little easier – a six-step guide to creating a behavior change marketing plan and worksheets to get you started. There are a lot of caveats here – too many to list. People spend decades studying behavior and trying to change it, and still come up short. Our six steps don't guarantee success. But we can help you take a better shot at it. Mainly, this will help you ask the right questions and develop a better hypothesis around what might change behavior. It will help you think like a marketer.

STEP ONE: SELECT YOUR TARGET BEHAVIOR

What's your vision of success and what behavior, if enough people did it, will get you there?

If your project is like most others, you are focused on a collective social outcome – cleaner air, better-performing students, healthier children or something else along those lines. There might be other solutions – putting filters on smokestacks, for example – that can be performed without mass behavior change. You can only employ behavior change marketing if there's a specific behavior necessary to reach your goal – like, for example, getting people to actually install those filters, and do it properly.

That's where behavior change marketing begins – with a specific behavior.

So how do you decide what behavior you want to change? Just WHO should be doing exactly WHAT to achieve your program's goal? The answer isn't always simple. Often this means dissecting your goals into a set of behaviors performed by different groups, then deciding which populations might have an outsized impact or might be easiest for your organization to change. Sometimes, we at Salter>Mitchell / Marketing for Change are brought in to moderate these discussions for an organization, and their stakeholders struggle to agree on what really matters in terms of behavior. Suffice it to say that this step, while not always easy, is essential. And if needed, it makes sense to get help from an outsider to facilitate this discussion.

A target behavior in behavior change marketing has two parts: the ACTOR and the ACTION. The two are connected. You can't address one without considering the other. A campaign to encourage young mothers to exercise, for example, is totally different than an exercise campaign aimed at retirees. So the

first step is to name (1) the specific actors you want to influence and (2) the precise action you want them to take. Avoid listing the action you are against (for example, don't smoke). List the action they should take (refuse a cigarette). You can see an example in the box below.

At this point, you may also want to "segment" your actors. There are entire books on this subject, but the segmentation concept itself is simple: The more you group similar sets of actors, the better you will be able to address their specific needs and desires.

For example, for an initiative to reduce college student drinking, we might decide to target first-year students instead of all students because first-year college students approach drinking differently (and more ambitiously) than more experienced upper classman. There are dozens of segmentation schemes you might consider – splits based on demographics, psychographics, stages of change, and much, much more. For now, just remember the simple idea: The more narrowly defined the target actors, the more your program can specifically meet their needs. Just make sure you target enough people to make a significant impact on your program's bottom line.

Example

ACTOR	ACTION
First-year college students	Abstain from drinking alcohol or limit alcohol consumption to four or fewer drinks in a single evening.

STEP TWO: EVALUATE THE SITUATION

Once you know specifically who you want to do what, you need to take a look at why these people are not currently doing the target action. Be as specific & realistic as possible about your target action: What's going on? What's the context? When is it supposed to be done? What's competing with it?

Consider, for example, where and when your target behavior is taking place. For example, helping a father put a four-month-old in an infant seat is one thing; helping that same father place a six-year-old in a booster seat is another. Encouraging parents to use the "proper restraint" is a good general statement, but it is really several different behavioral goals and should be broken down that way.

Some ways to start evaluating the situation include:

- Situation analysis: pinpointing how a particular behavior is positioned relative to the alternatives
- Primary audience research: Research you do to learn what your actors want, need, think and feel
- Secondary audience research: What you learn by studying other people's research into the same group of people, such as a review of the existing customer data (a fancy way to say anything that you can find in reports, in databases or on the Internet about your target actors) and existing studies on the behavior.

When it comes to primary research, it is best to use a combination of qualitative research, such as focus groups, ethnographies and in-depth interviews, and quantitative research, such as surveys, so you can learn both how people process the issue (qualitative findings) and the number of people who feel one way or another (quantitative findings). Not every program can afford this kind of research. For those who can, the value of the research is entirely dependent on how the information is gathered and analyzed.

Bad data or insufficient analysis can be worse than no research at all. Good data can go a long way – from helping you craft a hard-hitting approach to having the findings on hand to sell-in that approach internally and externally.

In general, the idea is to review all research results in context of the project and its goals. Different organizations can afford different levels of sophistication in terms of research synthesis, and every project is a bit different. You will probably need at least some consulting help from professionals in the field. The point here is that you need this research: You can't begin to design a program to influence people if you don't know a lot about them.

Regardless of how you plan to get the answers, the questions are the same. They revolve around gaining key insights against the three pillars of behavioral influence mentioned above:

- Fun: How can we minimize the bad, and maximize the good around this behavior?
- Easy: What can we do to make the behavior easy to do in relation to its competition?
- Popular: What might make doing this behavior feel right and normal to our target actors?

The worksheets at the end of this document provide you with some of the key questions you need to explore. These are not the specific questions you would send out in a survey or moderator's guide; they are tools to help you determine how to design your research. Each question embeds a behavioral determinant – that is, a reason why someone might do something. In short, that's the main question you're exploring: Why would people do what I want them to do? What's in it for them – especially in the short term at the individual (versus societal) level?

You will also want to design your research so it examines the need-states of your actors (more on need-states in Step Three).

One final bit of advice here: As you consider each of these questions, it is important that you do so from the point of view of your target actors. Something you may see as a reward, they may view as a penalty, or vice versa. One example: The health risk posed by cigarettes can actually be positioned as a benefit to certain segments of teens. It allows them to quite literally take their lives in their hands, a way for them to fulfill their natural yearning for rebellion.

STEP THREE: IDENTIFY NEED-STATES OF YOUR TARGET ACTORS

This next step is tricky. It involves putting aside your target behavior for a moment and thinking very broadly about your target actors. What are their interests, aspirations and needs at this specific time in their lives? These factors have been called many things. We like the term "need-states" because it implies a state of mind rather than a physical need like food and water. It's as much about what the actors want as what they truly need.

To provide a benefit your target actors desire, you have to understand what they want, and not just in terms of the behavior you are targeting. Back when our Chief Creative Officer, Peter Mitchell, was working with the agency Crispin Porter + Bogusky on Florida's "truth" anti-smoking campaign, everyone involved was well aware of the many benefits of refusing tobacco – your clothes smell better, your skin is healthier, you are in better shape. But here's what was more important: Cigarettes were meeting some core need-states of teenagers, most notably rebellion and independence. If the campaign to reduce tobacco didn't address those issues, it wouldn't be successful. So instead of promoting an existing

benefit of avoiding tobacco use, the truth campaign created a new benefit – refusing a cigarette would now offer the opportunity to rebel against an adult institution, the tobacco industry. The truth campaign was all about positioning smoking as something some adults were conning teens into doing and positioning the refusal to smoke as a fun act of rebellion against these adults. That met a core need-state of teenagers, and it was one reason the campaign was so successful.

So what do your target actors really want at this time in their lives? Make a list of your target actors' three to six most important need-states. Some possible ideas are listed below:

Adventure	Financial Security	Order
Approval	Freedom	Popularity
Autonomy	Friendship	Power
Balance	Fun	Recognition
Basic Needs	Hope	Respect
Belonging	Identity	Safety
Challenge	Knowledge	Self-Esteem
Community	Love	Simplicity
Control	Luxury	Sympathy
Empathy	Meaning	Wealth

Now, put the list on your desk next to your computer. Memorize it. Dream about it. Benefits related to these need-states will be the most powerful by far.

STEP FOUR: LIST YOUR POTENTIAL "OFFERS"

FUN: MAXIMIZE THE "GOOD" AND MINIMIZE THE "BAD" BY:

- Offering or highlighting immediate rewards of acting
- Addressing any perceived risks associated with the behavior
- Eliminating or reducing any penalties associated with the behavior
- Associating the behavior with positive emotions (more motivating than negative emotions)

EASY: BOOST CONFIDENCE BY:

- Allowing people to "sample" the behavior
- Acknowledging any challenges/showing empathy

IMPROVE KNOWLEDGE AND SKILLS BY:

- Offering training
- Offering clearer directions
- Offering more guidance
- Creating a tool that helps people do the behavior
- Making the target behavior itself simpler

OVERCOME "ENVIRONMENTAL" BARRIERS BY:

- Building a tool that helps people overcome the barriers
- Making the behavior more convenient (and/or a competing behavior less convenient)

- Gradually engaging the target actors through permission marketing. In general, permission marketing means slowly winning the actor's "permission" to make your sale. It might begin with someone giving you permission to email them something (in exchange for getting information they are already seeking), then maybe getting permission to send them ideas about how to change their behavior, and so on.
- Advocating for policy changes
- Developing partnerships with organizations that dominate the external environment around a behavior

GIVING THE TARGET ACTORS MORE CONTROL BY:

- Offering more options or choices
- Allowing people to more easily customize what they do
- Fitting the behavior more closely to their lifestyle or work demands
- Building a product that gives them more control over the behavior

REDUCING A NECESSARY INVESTMENT OF TIME, MONEY OR OTHER RESOURCES BY:

- Lowering the price of a program
- Redefining the behavior so it can be done in less time or with fewer resources
- Building a product that reduces the investment necessary to do the behavior

POPULAR: PROMOTE WHAT'S "NORMAL" BY:

- Surveying the target actors and publicizing the results to reveal a norm that exists but may not be widely recognized
- Publicizing how more and more people, perhaps celebrities, are doing the behavior to hint at an emerging norm
 - Recruiting a network of grassroots supporters who can act as advocates for the behavior
 - Removing any stigma around behavior
 - Giving social "permission" to engage in behavior

MAKING THE BEHAVIOR MORE OF AN EXPECTATION BY:

- Reworking communication messages with target actors to position the behavior as expected rather than sought
- Partnering with organizations tied to the target actors to promote the behavior as part of that group's identity
- Repositioning the behavior, through advertising and other communication, as something target actors are expected to do

LEVERAGING CULTURAL TRADITIONS BY:

- Embedding the behavior into a regular and popular community activity
- Linking the behavior to a popular traditional activity or custom
- Repositioning the behavior, through advertising and other communication, as something specific to the target actors
- Linking the behavior to other activities specific to these target actors

LINKING TO SELF-STANDARDS:

- Making the behavior fulfill a self-standard of the target actors
- Helping target actors use this behavior to promote who they are

MAKE NON-COMPLIANCE FEEL MORE LIKE A LOSS:

- Reframing the target behavior as a benefit nearly everyone is getting (so not doing it means you are losing out)
- Showing how not engaging in the behavior is leading to a loss in something the target audience values.
- Developing a tool that allows people to calculate what they lose when they do not do the behavior

STEP FIVE: CHOOSE A STRATEGY AND CREATE A PLAN

Now you have some ideas. The next step is to prioritize and build a simple strategy. You should be able to describe your strategy in one or two sentences – something like: We are going to get people to [do your behavior] by [what you're offering] through [how you make the offer real].

Here's an example from our Chesapeake Club campaign:

We are going to discourage people from fertilizing in the spring by offering those who wait a new lifestyle brand imbued with the cachet of the Chesapeake Bay. We'll create the brand through a mass media campaign, a partnership with restaurants, a lawn service offering, and a useful lifestyle website.

The goal here is to get your mind around what you are trying to accomplish. In the Chesapeake Bay example, our research showed no statistical relationship between whether one fertilizes and one's pollution concerns. Any overly environmental message would simply be tuned out. So instead, we decided to build a lifestyle brand that would associate our target behavior with a high-end local lifestyle. We looked for tactics that would create this kind of brand. Having a TV spot featuring the Sierra Club president would have been a mistake; that would have built an environmental, not a lifestyle, brand.

Instead, our spokesman was someone eating seafood and our tag line was "save the crabs, then eat 'em." The humor helped make us less preachy and more fun.

Your strategy should do the same thing. It should steer your campaign. To create this strategy, look over the ideas you put together in Step Four, and develop a theme or two that might tie the approach together. It's important at this point that you abandon some of your ideas. Even if your resources are unlimited, your attention is not. You want to find the sweet spot – the one change that will make the most difference – and develop your campaign around that.

This is also another good time to get professional marketing help, if you have not been using some already. You should have fleshed out most of the issues. But without a lot of marketing experience, it may be tough to see an overarching theme. After all, remember you are probably deep in the trees on this issue, so it's difficult to see the forest.

With your strategy in place, you can begin planning your tactics. In short, these are the specific actions you are going to take, such as putting up posters or developing a partnership. The breadth of tactics from which you could choose– from advertising to program alterations – goes well beyond the scope of this guide.

Just remember to think beyond messaging. Messages can be very important, but other factors – like the design of your program or how you help people with the behavior – are often even more important. For example, you can ask yourself if what people experience in your program is as pleasant as a break at Starbucks or more like a stop at the Division of Motor Vehicles. Remember the part about making your target behavior fun, easy and popular. Just telling people that it's fun, easy and popular is not enough. It's got to feel that way.

Your marketing plan document can take whatever format is most helpful for you. These plans typically contain:

- A clear statement of your goals, including measurable objectives you plan to track;
- A description of your target actors (this is often called a "target audience," a phrase we reject as too passive), including details about what segments will get the most focus;
- A "logic model" showing a flow chart of specifically how you expect to influence behavior and noting where you intend to measure progress;
- A brief description of your strategy and core tactics;
- A timeline showing what you plan to do to implement the program. You can download a marketing plan format at FunEasyPopular.com.

STEP SIX: IMPLEMENT AND EVALUATE

Not much explanation is necessary here. Simply execute the plan developed in the earlier steps. Easier said than done, of course, and there is a lot of advice available about how to execute various tactics. Seek out what you can – from your colleagues, books and the Internet, and professional firms like, for example, us (MarketingForChange.com).

Finally, you should also invest the necessary time and resources into monitoring and evaluation. Unless you measure your impact, you have no idea of what is working, or whether it's working at all, and cannot adequately shift course if you hit roadblocks along the way. And, of course, it's much more difficult for you to claim success.

You can find discussions of monitoring and evaluation and other evaluation resources at FunEasyPopular.com.

One question we get all the time is: How do I start applying behavior change marketing? The simple answer is: Start thinking differently. The next time you face a behavior change challenge, apply the concepts discussed here.

To help you do that, we've included some worksheets we at Marketing for Change use in the training workshops we do for companies, non-profits and government organizations. They are a series of questions you can ask yourself as you address any problem – just remember to start by boiling down the issue to the specific behavior you need to change.

While this guide is far from comprehensive, it is a starting point. Our hope is that, like a good marketing program, this has helped solve some problems for you – and ultimately encouraged you to change your behavior.