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Training materials for Module 2: (Marketing - Introduction to Theory and Practice)

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Week 1. NATURE AND SCOPE OF MARKETING. DEFINITION, HISTORICAL DEVELOPMENT AND CONCEPTS

Fundamentals of Marketing, Historical development of marketing (lecture)

Plan:

1. The history of marketing.
2. Marketing and marketing ethics.
3. Ethical marketing.
4. Marketing practices and ethical issues.
5. Data processing and analysis.

1. The History of Marketing

Today marketing is known as an advanced blend of strategy and technology, however, it hasn't always been this way. The history of marketing as we know it began with humble beginnings of simply trying to sell goods and services.

Attempts to accomplish this may be as old as civilization itself. Some believe it started with trying to presents goods in a certain way for trading. The effort to develop persuasive communications for selling goods and services has been around since the times of ancient China and India. This activity may not have been recognized as a marketing business at the time, but it is where the idea for marketing started to develop.

Concept of Marketing

The ideas of marketing as it is understood in the modern era began during the time of the Industrial Revolution. This period spanned the late 18th century and lasted long into the 19th century. It was a time of rapid social change motivated by innovations in the scientific and technological industries.

It was during the Industrial Revolution that purchasing goods began to be easier for a consumer than make things themselves. Mass production created many industries engaged in the same endeavor to serve the needs of a growing consumer market. The infrastructure for transportation as well as mass media took hold. It created a need for producers to find better ways to develop products customers needed and a more sophisticated approach to informing them about these commodities.

Increased Competition

Starting in the early twentieth century to the late 1940s competition in the business world became intense. The need to increase selling by using marketing techniques became an essential part of being competitive.

The competition also drove the need to increase production outputs and market shares within all industries. Marketing began to emphasize distribution methods as well as types of consumer communication. The goal soon became to persuade consumers the goods and services provided by one company were better than those of another company offering the same thing.

2. Marketing and marketing ethics

Marketing: A key focus in the marketing discipline is the boundary-spanning role between the firm and its ever-changing environments, or more precisely to foster exchange of its outputs, i.e. products and services with the environment, where customers represent a key constituency. Furthermore, the marketing discipline is not static rather it can be-considered “a living organism” addressing new phenomena as they emerge, creating and adapting new concepts, theory and methodologies to create new insights and influencing the firms’ activities.

3. Ethical marketing

Ethical marketing is less of a marketing strategy and more of a philosophy that informs all marketing efforts. It seeks to promote honesty, fairness, and responsibility in all advertising. Ethics is a notoriously difficult subject because everyone has subjective judgments about what is «right» and what is «wrong». For this reason, ethical marketing is not a hard and fast list of rules, but a general set of guidelines to assist companies as they evaluate new marketing strategies.

There are distinct advantages and disadvantages to ethical marketing. Unethical advertising is often just as effective as it is unethical. And since unethical behavior is not necessarily against the law, there are many companies who use unethical advertising to gain a competitive advantage. Many people buy diet pills even though they are rarely, if ever, effective. This is because some diet pill companies use exaggerated and manipulative claims to essentially trick customers into buying these products. If that same company committed to using ethical advertising they would probably go out of business. However sneaky their business model may be, it is not illegal and it is keeping their doors open.

For companies looking to improve the image of a brand and develop long-term relationships with customers, this kind of unethical behavior can quickly lead to failure. Customers do not want to feel manipulated by the brands they like. Companies can use ethical marketing as a way to develop a sense of trust among their customers. If a product lives up to the claims made in its advertising, it reflects positively on the entire company. It can make the consumer feel like the company is invested in the quality of the products and the value they provide customers.

Dove soap, for instance, ran a widely seen ad campaign featuring “real” models. The ad was meant to promote realistic body images and encourage girls to love the way they looked even if they were not supermodels. Dove marketed ethically in one campaign and unethically in another. This illustrates how difficult it is to do the right thing in all circumstances. What is most important for any company that claims to practice ethical advertising is to make it a fundamental feature of their marketing process.

Every company has the opportunity to engage in ethical marketing. Any business, from the smallest mom and pop store to the biggest multinational corporation can choose to be open, honest, and fair when they advertise to their customers. When done in a thoughtful way, ethical marketing can be an economical and effective form of advertising. Similarly, unethical advertising doesn't guarantee higher sales or lower advertising costs.

Some companies operate according to lofty personal principles. For these companies, advertising in an ethical way is a natural and necessary extension of their corporate character.

For other companies, ethical marketing will be little more than an opportunity to boost their credibility:

Surrogate Advertising – In certain places there are laws against advertising products like cigarettes or alcohol. Surrogate advertising finds ways to remind consumers of these products without referencing them directly.

- Exaggeration – Some advertisers use false claims about a product's quality or popularity. A Slogan like "get coverage everywhere on earth" advertises features that cannot be delivered.
- Puffery – When an advertiser relies on subjective rather than objective claims, they are puffing up their products. Statements like "the best tasting coffee" cannot be confirmed objectively.
- Unverified Claims – Many products promise to deliver results without providing any scientific evidence. Shampoo commercials that promise stronger, shinier hair do so without telling consumers why or how.
- Stereotyping Women – Women in advertising have often been portrayed as sex objects or domestic servants. This type of advertising traffics in negative stereotypes and contributes to a sexist culture.
- False brand comparisons – Any time a company makes false or misleading claims about their competitors they are spreading misinformation.
- Children in advertising – Children consume huge amounts of advertising without being able to evaluate it objectively. Exploiting this innocence is one of the most common unethical marketing practices. In Figure 1.1 is shown the type of ethical marketing.

Fig.1.1. The type of ethical marketing

Theories of ethical marketing

From the definitions of marketing ethics, we can understand that the aim of marketing ethics is not mere legal compliance; rather it is about moral judgments.

Besides this, the definitions show us that there are different approaches and theories in marketing ethics. Because of the vast nature of ethical theories, however, this study will focus on Consequentialist theory and deontological theories.

Consequentialist theory

One of the philosophical theories which is consequence based is consequentialist theory. Theory is sometimes referred to as teleological and when you are attempting to decide what is right or wrong, consequentialist theories focus attention on the results or consequences of the decision or action.

Deontological theory

On the opposite side of consequentialist theory is deontological theory, which is interested on the right of individuals and on the purposes associated with a particular behavior. 'Deontology (from the Greek word for "ethics") refers to moral philosophies that focus on the rights of individuals and on the intentions associated with a particular behavior rather than on its consequences. Fundamental to deontological theory is the idea that equal respect must be given to all persons. Unlike utilitarian's, deontologists argue that there are some things that we should not do, even to maximize utility.

4. Marketing practices and ethical issues

Business practices are often under attack because business situations routinely pose tough ethical dilemmas. Therefore, at the heart of marketing ethics are decisions that marketing practitioners make about ethical questions. Ethical questions most often arise in marketing when a stakeholder group or some segment of the public feels that the actions taken by some (or many) marketers might be judged morally inappropriate.

Sample size and procedure

As the number of consumers is infinite and is difficult to prepare source list (Figure 1.2).

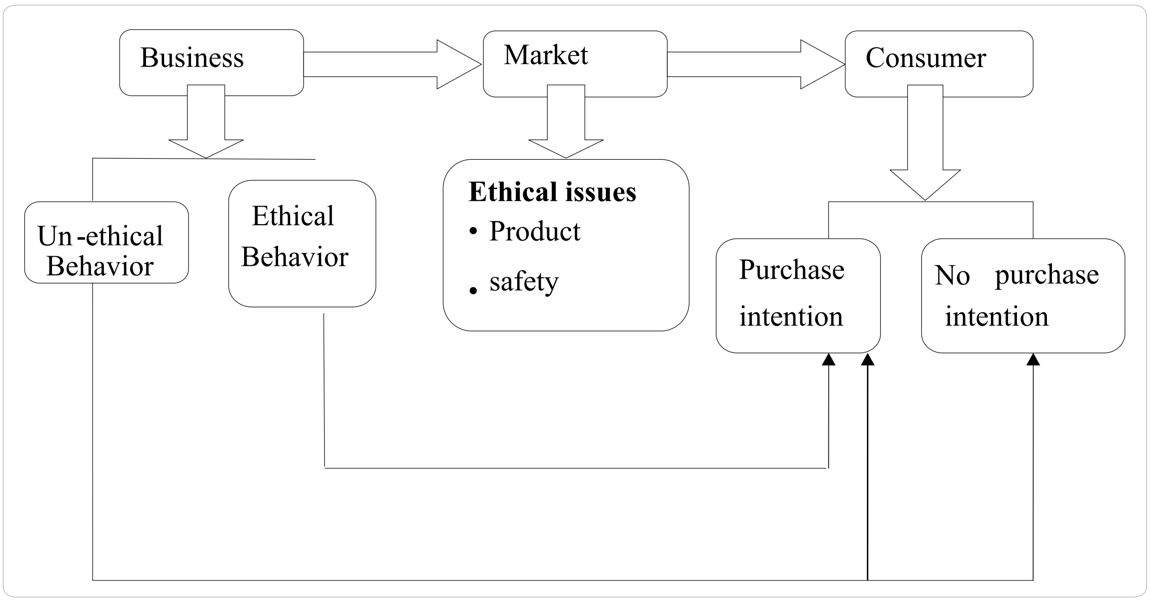

Fig.1.2. Conceptual framework of the study

5. Data processing and analysis

Data processing: The researcher performed the data editing, coding, data entry and data cleaning activity in order to check the consistency of the data that were collected from the respondents.

Data analysis: The researcher employed both qualitative and quantitative methods of analysis. The researcher applied qualitative method of analysis for short answers collected from respondents though the designed questionnaire. Quantitative way of analysis was also applied for the data, which were collected from small sized cloth shop consumers through structured questionnaire.

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Main Concepts of Marketing (seminar)

Given the importance of customer needs and wants in marketing, we have to understand them correctly.

They have been defined long time ago as this:

- **Needs:** Something necessary for people to live a healthy, stable and safe life. When needs remain unfulfilled, there is a clear adverse outcome: a dysfunction or death. Needs can be objective and physical, such as the need for food, water and shelter; or subjective and psychological, such as the need to belong to a family or social group and the need for self-esteem.
- **Wants:** Something that is desired, wished for or aspired to. Wants are not essential for basic survival and are often shaped by culture.
- **Demands:** When needs and wants are backed by the ability to pay, they have the potential to become economic demands.

There are numerous marketing concepts which are used by marketers as a reference in the marketing field. Some of these marketing concepts exist to date, while some others are outdated and have been taken over by other marketing concepts.

The five marketing concepts

The five marketing concepts are:

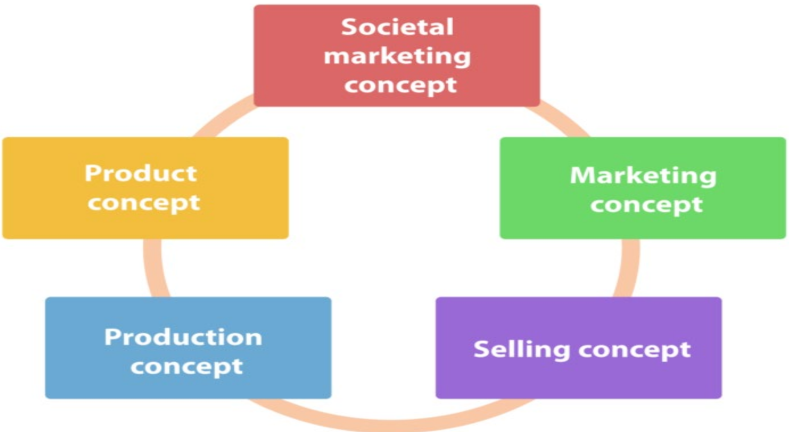

Fig.1.3. The five marketing concepts

Let's take a closer look at each one.

The production concept

During the era of the production concept, businesses were concerned primarily with production, manufacturing, and efficiency issues. Companies that use the production concept have the belief that customers primarily want products that are affordable and accessible.

The production concept is based on the approach that a company can increase supply as it decreases its costs. Moreover, the production concept highlights that a business can lower costs via mass production.

A company oriented towards production believes in economies of scale (decreased production cost per unit), wherein mass production can decrease cost and maximize profits. As a whole, the production concept is oriented towards operations.

The product concept

This concept works on an assumption that customers prefer products of greater *quality* and *price* and *availability* doesn't influence their purchase decision. And so company develops a product of greater quality which usually turns out to be expensive.

One of the best modern examples would be IT companies, who are always improving and updating their products, to differentiate themselves from the competition. Since the main focus of the marketers is the product quality, they often lose or fail to appeal to customers whose demands are driven by other factors like price, availability, usability, etc.

The selling concept

Production and product concept both focus on production but selling concept focuses on making an actual sale of the product. Selling concept focuses on making every possible sale of the product, regardless of the quality of the product or the need of the customer.

The selling concept highlights that customers would buy a company’s products only if the company were to sell these products aggressively. This philosophy doesn’t include building relations with the customers. This means that repeated sales are rare, and customer satisfaction is not great.

The marketing concept

A company that believes in the marketing concept places the consumer at the center of the organization. All activities are geared towards the consumer. A business, aims to understand the needs and wants of a customer. It executes the marketing strategy according to market research beginning from product conception to sales.

By focusing on the needs and wants of a target market, a company can deliver more value than its competitors. The marketing concept emphasizes the “pull” strategy". This means that a brand is so strong that customers would always prefer your brand to others’.

The societal marketing concept

This is a relatively new marketing concept. While the societal marketing concept highlights the needs and wants of a target market and the delivery of better value than its competitors, it also emphasizes the importance of the well-being of customers and society as a whole (consumer welfare or societal welfare).

The societal marketing concept calls upon marketers to build social and ethical considerations into their marketing practices. They must balance and juggle the often-conflicting criteria of company profits, consumer want satisfaction, and public interest.

The five marketing concepts are a good example of how marketing has changed throughout the years. It has shifted its focus from products to users.

Fundamental of Marketing (Case Study)

The Case Study will be presented by the trainers.

Week 2. SOCIAL MARKETING

Social Marketing (lecture)

Plan:

1. Social Marketing.
2. The Importance of Social Marketing.
3. Key Social Marketing Tips and Strategies.

1. Social Marketing

Social marketing is an approach used to develop activities aimed at changing or maintaining people's behavior for the benefit of individuals and society as a whole.

Combining ideas from commercial marketing and the social sciences, social marketing is a proven tool for influencing behavior in a sustainable and cost-effective way.

It helps you to decide:

- Which people to work with
- What behaviour to influence
- How to go about it
- How to measure it

Social marketing is not the same as social media marketing. Find out more.

Approach

Social marketing is a systematic and planned process. It follows six steps

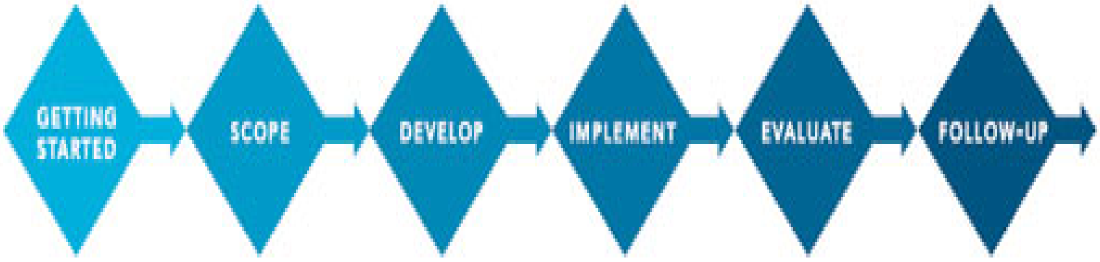

Fig.2.1. The steps of social marketing

Behavior

The goal of social marketing is always to change or maintain how people behave – not what they think or how aware they are about an issue. If your goal is only to increase awareness or knowledge, or change attitudes, you are not doing social marketing.

Benefits people and society

This is the value – perceived or actual – as it is defined by the people who are targeted by a social marketing intervention. It is not what is assumed to benefit them by the organization that is trying to encourage the behavior change.

Fig.2.2. Benefits people and society scheme

A social marketing approach

Even if you don't take social marketing any further, just considering these four questions will add value to your projects and policies.

1. Do I really understand my target audience and see things from their perspective?
2. Am I clear about what I would like my target audience to do?
3. For my target audience, do the benefits of doing what I would like them to do outweigh the costs or barriers to doing it?
4. Am I using a combination of activities in order to encourage people to achieve the desired action?

How social marketing helps?

Policy: social marketing helps to ensure policy is based on an understanding of people's lives, making policy goals realistic and achievable.

Strategy: social marketing enables you to target your resources cost-effectively, and select interventions that have the best impact over time.

Implementation and delivery: social marketing enables you to develop products, services and communications that fit people's needs and motivations.

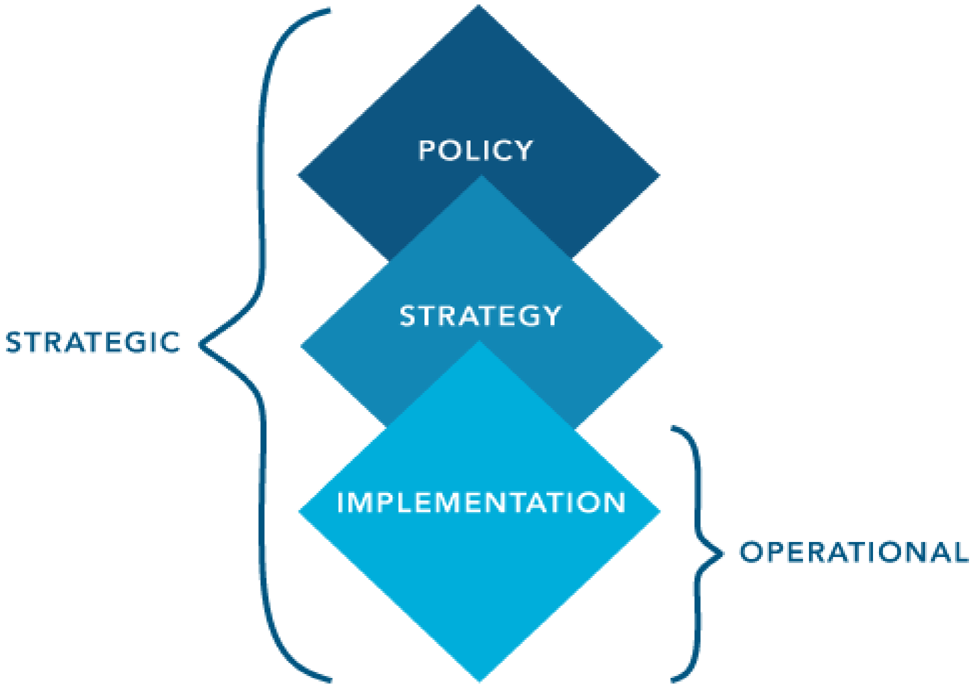

Fig.2.3. The levels of Social Marketing

Social marketing is commonly used for causes like:

Health and safety, including:

- Anti-smoking
- Anti-drug
- Promoting exercise and healthy eating
- Safe driving
- Railroad station safety

Environmental causes, including:

- Anti-deforestation
- Anti-littering
- Endangered species awareness

Social activism, including:

- Illuminating struggles that people of color, people with disabilities, etc. face, then inspiring people to fight against mechanisms that create inequality
- Anti-bullying
- Fighting gender stereotypes

Who initiates these social marketing campaigns? Nonprofit organizations and charities run the majority of social marketing campaigns. Government organizations, highway safety coalitions, and emergency services (police, fire, ambulance) run them as well. But social marketing is not out of the question if you're a commercial business. Commercial brands will sometimes run social marketing campaigns for causes they are passionate about.

2. The Importance of Social Marketing

Why is social marketing so important? Well, think about "traditional" ads for products or services. You aren't convinced to check out a product or service through an ad alone (in fact, you tune out the vast majority of ads you see).

But how does a well-designed ad capture your attention? It either takes a super creative angle you didn't expect, or makes you laugh, cry, or think. Not every ad convinces you to check out the product or service it promotes, but the best ones appeal to creativity or emotion to motivate people to do so.

It's the same way with social marketing. People don't like being told what to do. They might not be convinced by news and typically presented PSAs about a certain social issue. Or, they might not be aware of the problem or its scope.

Some people might also find a socially beneficial behavior too difficult to perform, or might think they can't help solve an issue on their own. Alternatively, they might have trouble breaking a long-standing habit (i.e. someone trying to quit smoking, or someone who uses disposable water bottles regularly).

But well-executed social marketing captures attention, and spreads awareness about a social issue, through creativity and emotion**.** Most importantly, it presents a compelling, simple way to make the world better, and makes this beneficial behavior more desirable than any "competing" behavior. Through these elements, social marketing is able to successfully "sell" a beneficial behavior.

Social marketing is especially powerful when it involves a charitable donation element, because people want to make a difference in the world. They're very willing to give-it's just a matter of where.

What is NOT social marketing?

Often, people get confused about what social marketing is and isn't. So, before we keep going, let's break down 3 types of marketing that do NOT count as social marketing.

1. **Social Media Marketing:** Many people think social marketing is the same thing as *social media* marketing: marketing on social networks like Facebook, Twitter, Instagram, and YouTube. Well, that's not true. Sometimes, social media will be used to spread, and generate buzz around, social marketing campaigns. However, most marketing on social media is oriented towards promoting a product or service. Those viral tweets by Wendy's, and that influencer's promotion of Fashion Nova on Instagram, are definitely not social marketing!
2. **Self-Serving Donations:** If a company publicizes a donation they make to a charity or cause, that isn't social marketing, because their aim is partially to boost their own reputation.
3. **Marketing "green" or "charity tie-in" products:** If a company is marketing its own line of eco-friendly water bottles, hybrid cars, reusable lunch containers, or other "green" products, this doesn't count as social marketing. The marketing of products with a charitable donation tie-in (such as TOMS) doesn't count either. In both of these examples, the primary focus is on selling a product. Meanwhile, with social marketing, the focus is solely on changing behaviors for the public good.

Here's an example:

- An ad with alarming stats on the number of disposable water bottles thrown out per year, which promotes Hydro Flask reusable bottles as environmentally friendly, and that is made by Hydro Flask to sell its own bottles, is *not social marketing.*

- Meanwhile, a general campaign to promote reusable water bottles, made by an environmental organization, that does not promote a specific brand of reusable bottle, *is* social marketing.

3. Key Social Marketing Tips and Strategies

How will you creatively communicate the "4 Ps" to your audience, and strike an emotional chord? And how can you work to maximize your impact over time? Consider these tips and strategies for the best results.

Properly minimizing "price" may take several rounds of research

Before you design your campaign, to figure out what obstacles stand in the way of your audience performing your desired behavior ("price"), you'll need to do some thorough research. Survey your audience online, on the phone, or in print. Keep in mind that it may take several surveys and conversations to accurately find the "price." After all, as you talk to more people, you'll have a better idea of the most common obstacles.

After you've identified the "price" and brainstormed ways to minimize it, consider holding focus groups, to see how people respond to the identified problem and possible solution.

Once you're ready to design your campaign, create a slogan and compelling visuals, and think about crafting a simple but memorable symbol, to serve as powerful "triggers" that motivate action and stick in your audience's minds.

Craft a catchy slogan

"Only you can prevent forest fires." "This is your brain on drugs." "We can do it!" The three iconic social marketing campaigns listed at the beginning of the article all had catchy, easy-to-remember slogans. Writing some sort of slogan is a necessity for your own social marketing campaign. As we mentioned above, you want your audience to understand the behavior you're seeking, and how to act on the behavior, as quickly as possible. So, it makes perfect sense to condense that idea into a campaign slogan - a simple, enticing sentence that will stay in your audience's minds. If you can include a reference to the desirable behavior's benefits, even better.

Visuals are everything

Imagery that surprises or shocks audiences can be a powerful motivator, especially if it illustrates the problem or shows the negative impact of undesirable behaviors. Choose your campaign medium carefully to maximize the force of your visuals.

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Main Concepts of Social Marketing and Model of Social Marketing (seminar)

One of the key components of a social marketing campaign, and what sets it to raise public awareness, is the formative research conducted prior to and during the creative production process. Collecting and analyzing quantitative and qualitative research data will help you better understand the problem and its context; the audience affected by the problem and its knowledge, attitudes, and beliefs; and develop more effective messaging and audience outreach tactics.

Quantitative research may be obtained through secondary research methods, such as reviewing academic articles, research studies, census data, and epidemiologic reports obtained from the health department. If a social marketing campaign is being implemented on a local level, it is also advised to distribute a survey directly to members of the target audience. Conducting your own primary quantitative research after reviewing the secondary research allows you to gather more specific information about the behaviors and needs of the precise people for whom the campaign is being developed.

As important as quantitative research is the qualitative research in the formative research stage of social marketing. If a campaign is local, it is beneficial to visit the communities you want to target to conduct ethnographic observation. This is the process of observing how the target audience behaves in their own community and how the behavior you are trying to change is valued in that community.

Audience Segmentation in Social Marketing

Following a robust analysis of the data collected from both quantitative and qualitative research, the final step before developing campaign messages and design elements is to segment the audience.

Multirelationship model of social marketing

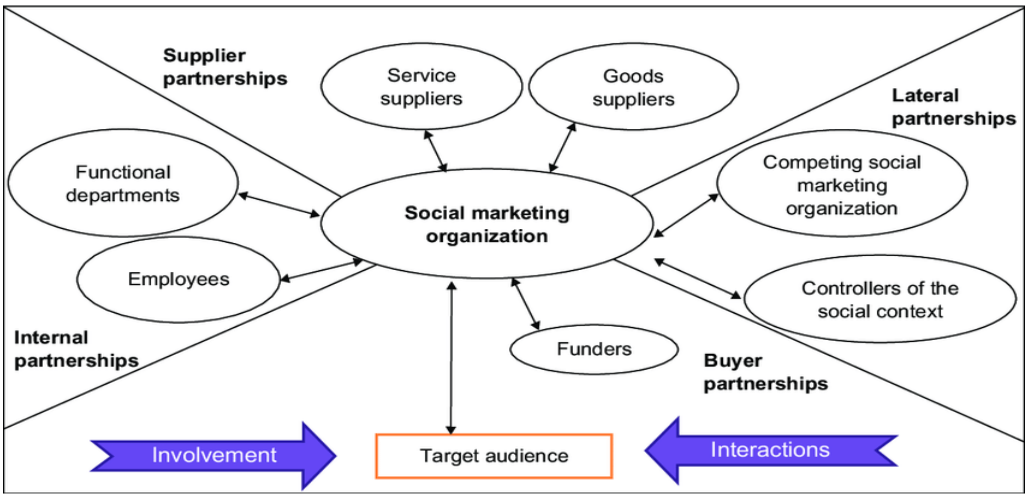

Fig.2.4. Multirelationship model of social marketing

Social marketing model (Case Study)

The Case Study will be presented by the trainers.

Week 3. RESEARCH METHODS IN MARKETING

Research Methods in Marketing, Marketing research process (lecture)

Plan:

1. Types of market research
2. An Overview of Market Research Methods

1. Types of market research

All market research falls under two distinct categories: primary research and secondary research.

Primary research looks at any data you collect yourself (or someone you pay). It encompasses analyzing current sales, metrics, and customers. It also takes into account the effectiveness of current practices, while taking competitors into account.

Secondary research looks at data that has already been published by others. It includes reports and studies from other companies, government organizations, and others in your industry.

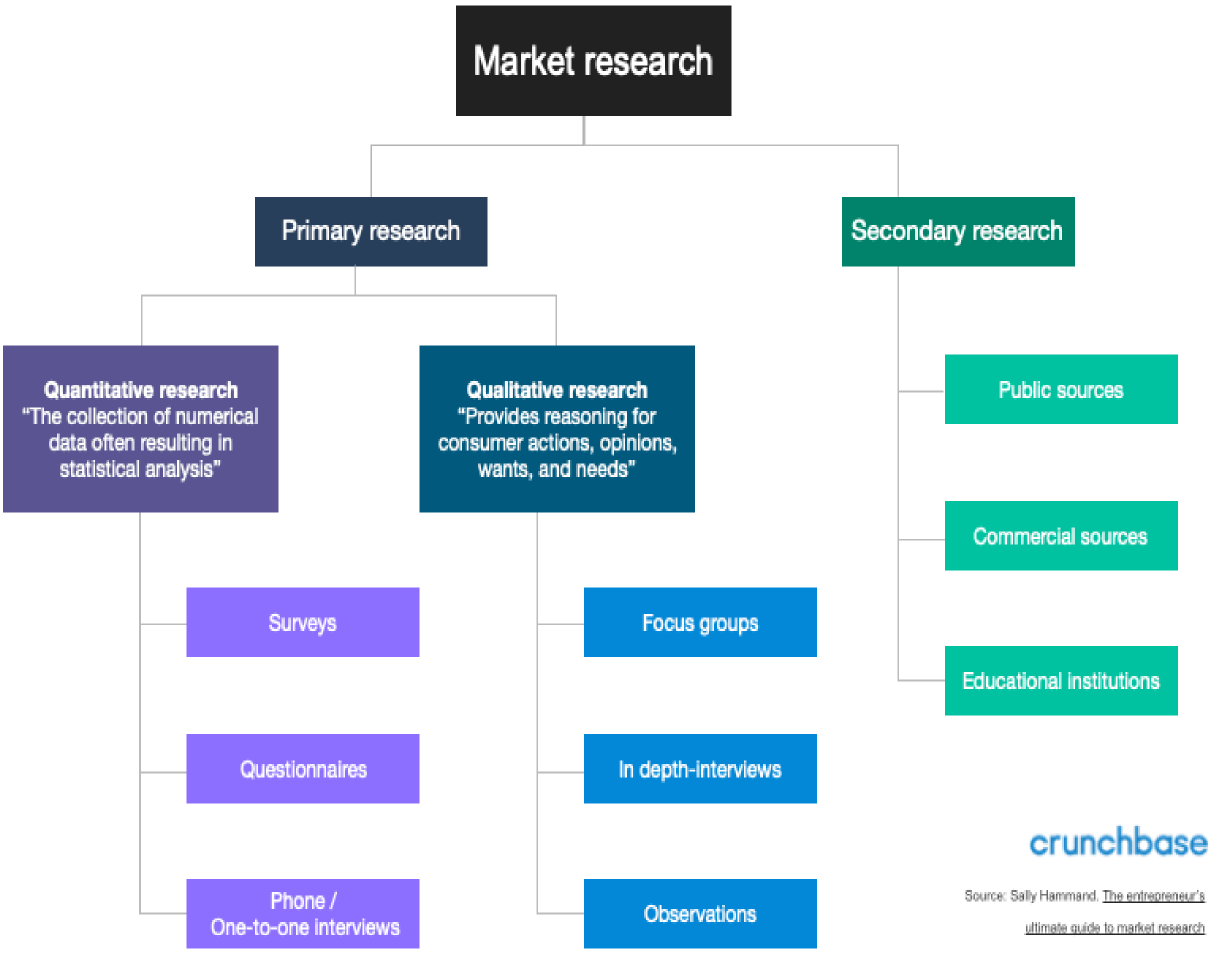

Fig.3.1. Market research structure

2. An Overview of Market Research Methods

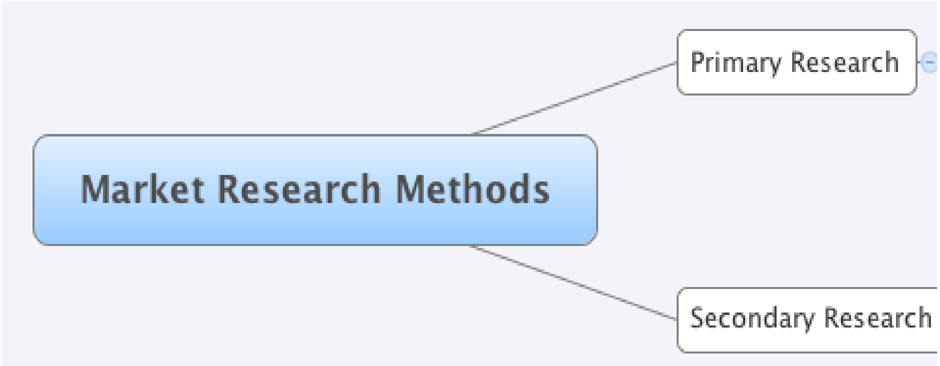

Fig.3.2. Market research methods

Primary Market Research Method #1 – Surveys

Primary research is sometimes called “field research” because you need to take a more direct approach to obtaining your data, often in the “field.”

Surveys are perhaps the most widely known and utilized method when it comes to market research. Surveys come in a wide variety of shapes and sizes, from that little “feedback card” on the table at your favorite restaurant to those never-ending web surveys that make you want to punch your computer.

Surveys make a lot of sense when the following conditions are true:

- You want to measure something objectively (or quantitatively).
- You have something specific to measure. In other words, you are beyond the exploratory portion of your research and you now want to test more specific questions.
- You have a relatively large sample to query.
- You have the resources (time and money) to conduct a survey.

Conversely, surveys are *not* a great research tool when:

- You are still exploring your topic. In this case, you don’t know the right (specific) questions to ask in a survey. Instead, you might conduct a focus group to get a better understanding of the topic. Here is an example: Let’s say you want to make and sell a better mousetrap. Instead of using a survey to ask people what color they prefer, you might want to hold a focus group with people who have mice problems and ask them open-ended questions about what they value in mouse control devices. You might hear things like “doesn’t kill mouse,” “easy to set,” “small size,” “price,” “disposable,” etc. Now that you have explored the topic and discovered these attributes, you can then measure their relative importance with survey devices.
- You don’t have the luxury of time and/or money to run a survey.
- Your available audience is too small.

Surveys are perhaps the most widely known and utilized method when it comes to market research. Surveys come in a wide variety of shapes and sizes, from that little “feedback card” on the table at your favorite restaurant to those never-ending web surveys that make you want to punch your computer.

Surveys can be used effectively for satisfaction research (customers or employee), measuring attitudes, pricing research, fact gathering (e.g. the census), and much much more. You'll find surveys administered in all sorts of ways, including snail mail form, web forms, face-to-face (that guy at the mall with the clipboard), over the phone (the guy who calls during dinner), on the sidebar of a blog, and even on mobile devices via text message or otherwise. Surveys can be self-administered (the respondent reads and answers questions alone) or they can be administered by a person who records your answers.

I could go on and on about surveys, but I'll save it for now since this is an overview. You can read more about survey design best practices (e.g. customer satisfaction survey question ideas), incentive strategies, new market research methods, and more.

Primary Market Research Method #2 – Focus Groups

Focus groups involve getting a group of people together in a room (usually physically, although technology is making virtual, or online focus groups more feasible). These people fit a target demographic (e.g. "mothers under 40 with an income over $50k", "college males who play 8 or more hours of video games a week", "guys with red beards under 6 feet tall," etc.) depending on the product or service in question. Participants are almost always compensated in some way, whether it be a money, coupons, free products, etc. A moderator will guide the discussion, with a goal of getting participants to discuss the topic among themselves, bouncing thoughts off of one another in a natural group setting. Professional focus group rooms will have a one-way mirror on one wall, with a team of observers on the other side. The company or group that commissioned the study can sit-in on the meeting, along with members of the research team who can take notes without disrupting the participants.

Focus groups are excellent for exploratory, qualitative research. In the "new mouse trap" example, a focus group can reveal all sorts of important mouse trap attributes that might not have been considered otherwise. Focus groups are great tools to use prior to a survey, because it will inform your survey questions to be more specific and targeted. Focus groups can also be beneficial after a survey, as a way to dive very deeply into a topic that came up in the survey. For example, an employee satisfaction survey may reveal "cafeteria food" to be a big issue. A follow-up focus group with a handful of employees will allow the employer to understand that issue much better (What is the problem with the food? Is it the taste, price, healthiness, temperature, something else?).

Primary Market Research Method #3 – Interviews

Like focus groups, individual interviews are a qualitative market research method. To simplify things, think of individual interviews as focus groups with only one participant and one moderator (interviewer). There is a wide spectrum of interviewing formats, depending on the goal of the interview. Interviews can be free flowing conversations that are loosely constrained to a general topic of interest, or they might be highly structured, with very specific questions and/or activities (e.g. projective techniques such as word association, fill in the blank, etc.) for the subject.

Like focus groups, interviews are useful for exploratory research. Use this market research method when you are interested in digging into a specific issue very deeply, searching for customer problems, understanding psychological motivations and underlying perceptions, etc.

Primary Market Research Method #4 – Experiments and Field Trials

Experiments and field trials involve scientific testing, where specific variables and hypotheses can be tested. These tests can be conducted in controlled environments or out in the field (natural settings). This form of market research is always quantitative in nature.

Experiments and field trials can be a hairy topic with lots of jargon, but here's a simple example that demonstrates an effective online experiment: In his first presidential campaign, Obama used "A/B testing" to optimize his campaign donation page. Some website visitors would see one image and others (at random) would see a different image. The Web team was able to measure which image was resulting in more donations, and they could quickly decide to use the more favorable image for all users. By employing this simple market research experiment on which website images performed better, Obama was able to maximize contributions in a major way.

Another example might be a cereal company making two different packaging styles and delivering each one to limited test market stores where their individual sales can be measured.

Primary Market Research Method #5 – Observation

Observational research can come in a different shapes and sizes. In general, there are two categories: (1) strict observation with no interaction with the subject at all, or (2) observation with some level of intervention/interaction between the researcher and subject. The greatest benefit of this technique is that researchers can measure *actual behavior*, as opposed to user-reported behavior. That's a big deal, because people will often report one thing on a survey, but behave in another way when the rubber hits the road. Observational research is a direct reflection of "real life," so these insights are often very reliable and useful. For more on visual observation, these guys have a nice write-up.

An Example of Observational Research

There are many examples of observational research. Here are a few:

Usability testing – Watching a subject use a prototype device is one form of observational research. Again, this can be done with or without intervention.

Eye Tracking – Let's say you have come up with a website. You might ask people to navigate your website, and you will use eye tracking technology to create a "heat map" of where their eyes go on the website. This information can be used to re-design and optimize the page elements.

Contextual Inquiry – This is a hybrid form of research that involves interviewing subjects as the researcher watches them work or play in their natural environment.

In-Home Observation – Watching a family member go through the morning routine in their home might turn up useful insights into pain-points that need solving.

In-Store Observation – Simply watching shoppers in action is another form of observational research. What do shoppers notice? How do they go through a store?

etc.

Mystery Shoppers – This involves hiring a regular person to go into a store and pretend to be an everyday shopper. They will then report on aspects of their experience, such as store cleanliness, politeness of staff, etc. In the case, the mystery shopper is the researcher and the store is the subject being observed.

Table 3.1

Eye tracking heat map: An Example of Observational Research

Methodology	Qualitative or Quantitative?	Typical Cost	Typical Time	Comments
Secondary Research	Can be either	Typically free or low cost	Short	Usually a great place to start, but often not detailed or specific enough
Surveys	Quantitative	Varies widely. Key costs include participant incentives, survey design, & survey administration	Medium	Excellent for measuring attitudes across a large population and for answering specific questions
Focus Groups	Qualitative	Medium. Key costs include focus group moderation and participant incentives	Medium	Good for exploratory research
Interviews	Qualitative	Similar to focus groups, but can be much cheaper depending on the audience and # of interviews	Short-Medium	Also good for exploratory research, along with deep dives into specific topics
Experiments &Field Trials	Quantitative	Often the most expensive method	Usually Long	Used for scientifically testing specific hypotheses
Observation	Usually Qualitative	Medium, relative to the other options	Medium	Good for measuring actual behavior, as opposed to self-reported behavior

Summary of Market Research Methods

There you have it. Now you are armed with a basic understanding of the various traditional market research methods! If you think I am missing any of the core methods, leave a note in the comments.

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Marketing research process (seminar)

A Standard Approach to Research Inquiries

Marketing research is a useful and necessary tool for helping marketers and an organization's executive leadership make wise decisions. Carrying out marketing research can involve highly specialized skills that go deeper than the information outlined in this module. However, it is important for any marketer to be familiar with the basic procedures and techniques of marketing research.

It is very likely that at some point a marketing professional will need to supervise an internal marketing research activity or to work with an outside marketing research firm to conduct a research project. Managers who understand the research function can do a better job of framing the problem and critically appraising the proposals made by research specialists. They are also in a better position to evaluate their findings and recommendations.

Periodically marketers themselves need to find solutions to marketing problems without the assistance of marketing research specialists inside or outside the company. If you are familiar with the basic procedures of marketing research, you can supervise and even conduct a reasonably satisfactory search for the information needed.

Fig.3.3. The marketing research process

Step 1: Identify the Problem

The first step for any marketing research activity is to clearly identify and define the problem you are trying to solve. You start by stating the marketing or business problem you need to address and for which you need additional information to figure out a solution. Next, articulate the objectives for the research: What do you want to understand by the time the research project is completed? What specific information, guidance, or recommendations need to come out of the research in order to make it a worthwhile investment of the organization's time and money?

It's important to share the problem definition and research objectives with other team members to get their input and further refine your understanding of the problem and what is needed to solve it. At times, the problem you really need to solve is not the same problem that appears on the surface. Collaborating with other stakeholders helps refine your understanding of the problem, focus your thinking, and prioritize what you hope to learn from the research. Prioritizing your objectives is particularly helpful if you don't have the time or resources to investigate everything you want.

To flesh out your understanding of the problem, it's useful to begin brainstorming actual research questions you want to explore. What are the questions you need to answer in order to get to the research outcomes? What is the missing information that marketing research will help you find? The goal at this stage is to generate a set of preliminary, big-picture questions that will frame your research inquiry. You will revisit these research questions later in the process, but when you're getting started, this exercise helps clarify the scope of the project, whom you need to talk to, what information may already be available, and where to look for the information you don't yet have.

Applied Example: Marketing Research for Bookends

To illustrate the marketing research process, let's return to Uncle Dan and his ailing bookstore, Bookends. You need a lot of information if you're going to help Dan turn things around, so marketing research is a good idea. You begin by identifying the problem and then work to set down your research objectives and initial research questions:

Identifying Problems, Objectives, and Questions	
Core business problem Dan needs to solve	How to get more people to spend more money at Bookends
Research objectives	1) Identify promising target audiences for Bookends; 2) Identify strategies for rapidly increasing revenue from these target audiences
Initial research questions	Who are Bookends' current customers? How much do they spend? Why do they come to Bookends? What do they wish Bookends offered? Who isn't coming to Bookends, and why?

Step 2: Develop a Research Plan

Once you have a problem definition, research objectives, and a preliminary set of research questions, the next step is to develop a research plan. Essential to this plan is identifying precisely what information you need to answer your questions and achieve your objectives. Do you need to understand customer opinions about something? Are you looking for a clearer picture of customer needs and related behaviors? Do you need sales, spending, or revenue data? Do you need information about competitors' products, or insight about what will make prospective customers notice you? When do need the information, and what's the time frame for getting it? What budget and resources are available?

Once you have clarified what kind of information you need and the timing and budget for your project, you can develop the research design. This details how you plan to collect and analyze the information you're after. Some types of information are readily available through *secondary research* and *secondary data* sources. Secondary research analyzes information that has already been collected for another purpose by a third party, such as a government agency, an industry association, or another company. Other types of information need to from talking directly to customers about your research questions. This is known as *primary research*, which collects *primary data* captured expressly for your research inquiry. Marketing research projects may include secondary research, primary research, or both.

Depending on your objectives and budget, sometimes a small-scale project will be enough to get the insight and direction you need. At other times, in order to reach the level of certainty or detail required, you may need larger-scale research involving participation from hundreds or even thousands of individual consumers. The research plan lays out the information your project will capture—both primary and secondary data-and describes what you will do with it to get the answers you need.

Your data collection plan goes hand in hand with your analysis plan. Different types of analysis yield different types of results. The analysis plan should match the type of data you are collecting, as well as the outcomes your project is seeking and the resources at your disposal. Simpler research designs tend to require simpler analysis techniques. More complex research designs can yield powerful results, such as understanding causality and trade-offs in customer perceptions. However, these more sophisticated designs can require more time and money to execute effectively, both in terms of data collection and analytical expertise.

The research plan also specifies who will conduct the research activities, including data collection, analysis, interpretation, and reporting on results. At times a singlehanded marketing manager or research specialist runs the entire research project. At other times, a company may contract with a marketing research analyst or consulting firm to conduct the research. In this situation, the marketing manager provides supervisory oversight to ensure the research delivers on expectations.

Finally, the research plan indicates who will interpret the research findings and how the findings will be reported. This part of the research plan should consider the internal audience(s) for the research and what reporting format will be most helpful. Often, senior executives are primary stakeholders, and they're anxious for marketing research to inform and validate their choices. When this is the case, getting their buy-in on the research plan is recommended to make sure that they are comfortable with the approach and receptive to the potential findings.

Applied Example: A Bookends Research Plan

You talk over the results of your problem identification work with Dan. He thinks you're on the right track and wants to know what's next. You explain that the next step is to put together a detailed plan for getting answers to the research questions.

Dan is enthusiastic, but he's also short on money. You realize that such a financial constraint will limit what's possible, but with Dan's help you can do something worthwhile. Below is the research plan you sketch out:

Table 3.2

Identifying Data Types, Timing and Budget, Data Collection Methods, Analysis, and Interpretation	
Types of data needed	1) Demographics and attitudes of current Bookends customers; 2) current customers' spending patterns; 3) metro area demographics (to

	determine types of people who aren't coming to the store)
Timing & budget	Complete project within 1 month; no out-of-pocket spending
Data collection methods	1) Current customer survey using free online survey tool, 2) store sales data mapped to customer survey results, 3) free U.S. census data on metro-area demographics, 4) 8–10 intercept ("man on the street") interviews with non-customers
Analysis plan	Use Excel or Google Sheets to tabulate data; Marina (statistician cousin) to assist in identifying data patterns that could become market segments
Interpretation and reporting	You and Dan will work together to comb through the data and see what insights it produces. You'll use PowerPoint to create a report that lays out significant results, key findings, and recommendations.

Step 3: Conduct the Research

Conducting research can be a fun and exciting part of the marketing research process. After struggling with the gaps in your knowledge of market dynamics-which led you to embark on a marketing research project in the first place-now things are about to change. Conducting research begins to generate information that helps answer your urgent marketing questions.

Typically, data collection begins by reviewing any existing research and data that provide some information or insight about the problem. As a rule, this is secondary research. Prior research projects, internal data analyses, industry reports, customer-satisfaction survey results, and other information sources may be worthwhile to review. Even though these resources may not answer your research questions fully, they may further illuminate the problem you are trying to solve. Secondary research and data sources are nearly always cheaper than capturing new information on your own. Your marketing research project should benefit from prior work wherever possible.

After getting everything you can from secondary research, it's time to shift attention to primary research, if this is part of your research plan. Primary research involves asking questions and then listening to and/or observing the behavior of the target audience you are studying. In order to generate reliable, accurate results, it is important to use proper scientific methods for primary research data collection and analysis. This includes identifying the right individuals and number of people to talk to, using carefully worded surveys or interview scripts, and capturing data accurately.

Without proper techniques, you may inadvertently get bad data or discover bias in the responses that distorts the results and points you in the wrong direction. The module on Marketing Research Techniques discusses these issues in further detail, since the procedures for getting reliable data vary by research method.

Step 4: Analyze and Report Findings

Analyzing the data obtained in a market survey involves transforming the primary and/or secondary data into useful information and insights that answer the research questions. This information is condensed into a format to be used by managers—usually a presentation or detailed report.

Analysis starts with formatting, cleaning, and editing the data to make sure that it's suitable for whatever analytical techniques are being used. Next, data are tabulated to show what's happening: What do customers actually think? What's happening with purchasing or other behaviors? How do revenue figures actually add up? Whatever the research questions, the analysis takes source data and applies analytical techniques to provide a clearer picture of what's going on. This process may involve simple or sophisticated techniques, depending on the research outcomes required. Common analytical techniques include regression analysis to determine correlations between factors; conjoint analysis to determine trade-offs and priorities; predictive modeling to anticipate patterns and causality; and analysis of unstructured data such as Internet search terms or social media posts to provide context and meaning around what people say and do.

Good analysis is important because the interpretation of research data-the "so what?" factor-depends on it. The analysis combs through data to paint a picture of what's going on. The interpretation goes further to explain what the research data mean and make recommendations about what managers need to know and do based on the research results. For example, what is the short list of key findings and takeaways that managers should remember from the research? What are the market segments you've identified, and which ones should you target? What are the primary reasons your customers choose your competitor's product over yours, and what does this mean for future improvements to your product?

Individuals with a good working knowledge of the business should be involved in interpreting the data because they are in the best position to identify significant insights and make recommendations from the research findings. Marketing research reports incorporate both analysis and interpretation of data to address the project objectives.

The final report for a marketing research project may be in written form or slide-presentation format, depending on organizational culture and management preferences. Often a slide presentation is the preferred format for initially sharing research results with internal stakeholders. Particularly for large, complex projects, a written report may be a better format for discussing detailed findings and nuances in the data, which managers can study and reference in the future.

Applied Example: Analysis and Insights for Bookends

Getting the data was a bit of a hassle, but now you've got it, and you're excited to see what it reveals. Your statistician cousin, Marina, turns out to be a whiz with both the sales data and the census data. She identified several demographic profiles in the metro area that looked a lot like lifestyle segments. Then she mapped Bookends' sales data into those segments to show who is and isn't visiting Bookends. After matching customer-survey data to the sales data, she broke down the segments further based on their spending levels and reasons they visit Bookends.

Gradually a clearer picture of Bookends' customers is beginning to emerge: who they are, why they come, why they don't come, and what role Bookends plays in their lives. Right away, a couple of higher-priority segments—based on their spending levels, proximity, and loyalty to Bookends—stand out. You and your uncle are definitely seeing some possibilities for making the bookstore a more prominent part of their lives. You capture these insights as "recommendations to be considered" while you evaluate the right marketing mix for each of the new segments you'd like to focus on.

Step 5: Take Action

Once the report is complete, the presentation is delivered, and the recommendations are made, the marketing research project is over, right? Wrong.

What comes next is arguably the most important step of all: taking action based on your research results.

If your project has done a good job interpreting the findings and translating them into recommendations for the marketing team and other areas of the business, this step may seem relatively straightforward. When the research results validate a path the organization is already on, the "take action" step can galvanize the team to move further and faster in that same direction.

Things are not so simple when the research results indicate a new direction or a significant shift is advisable. In these cases, it's worthwhile to spend time helping managers understand the research, explain why it is wise to shift course, and explain how the business will benefit from the new path. As with any important business decision, managers must think deeply about the new approach and carefully map strategies, tactics, and available resources to plan effectively. By making the results available and accessible to managers and their execution teams, the marketing research project can serve as an ongoing guide and touchstone to help the organization plan, execute, and adjust course as it works toward desired goals and outcomes.

It is worth mentioning that many marketing research projects are never translated into management action. Sometimes this is because the report is too technical and difficult to understand. In other cases, the research conclusions fail to provide useful insights or solutions to the problem, or the report writer fails to offer specific suggestions for translating the research findings into management strategy. These pitfalls can be avoided by paying due attention to the research objectives throughout the project and allocating sufficient time and resources to do a good job interpreting research results for those who will need to act on them.

Developing the research plan (workshop)

The Workshop will be presented by the trainers.

Week 4. RESEARCH METHODS IN MARKETING II

Research approaches in Marketing_qualitative and quantitative (lecture)

Plan:

1. Quantitative Market Research
2. Qualitative Market Research

1. Quantitative Market Research

Quantitative market research is the collection of numerical data often resulting in statistical analysis to understand trends in the data.

Fig.4.1. The scheme of Quantitative Market Research

The main characteristic of quantitative market research is that it allows for comparisons and trends in the data to be easily found and understood. It should also be noted that as a result of the standardized questions, quantitative market research is a more structured market research process and can therefore involve a larger number of respondents to participate in the research.

There are several different types of data collection in quantitative market research:

- Mail
- Face-to-face
- Telephone
- Email
- Online / web

It is important to carry out quantitative research before starting a new business, launching a new product, or service as it gives factual figures and data that highlights target market interest and can help secure investors, as the risk of their investment is reduced as future demand is shown. It also enables managers to compile sales forecasts and revenue. These can be done through the use of target market response rates and any pricing information or preferences that are revealed by respondents during the research.

2. Qualitative Market Research

Qualitative market research provides reasoning for consumer actions, opinions, wants and needs; it helps the marketer to understand why a consumer has acted and purchased in a certain way.

Fig.4.2. The scheme of Qualitative Market Research

This type of market research differs from quantitative market research as it does not follow a predetermined set of questions. Instead the research sets out topic, or discussion guides, to ensure that the research aims are still met and the appropriate questions are asked to the participant. During the research, the researcher is able to explore the discussion guide in great detail allowing for long discussions to develop; revealing a vast amount of information. Further to this, qualitative market research can be difficult for researchers to obtain all information discussed during the interview. As a result of this, qualitative market research is usually recorded to ensure all information is collected for analysis.

Qualitative market research, as with quantitative market research, has several different methods;

- Focus groups containing (6 – 8 participants)
- Mini group discussion (4 – 5 participants)
- Triad (3 respondents)
- Paired (2 respondents)
- ‘One on one’ depth interview (1 respondent)

It is important to carry out qualitative market research as it highlights target market opinion on the business idea, product or service. By understanding these views it can allow a manager to alter and adapt their idea to ensure consumer satisfaction and competitiveness within the market; the product or service is needs the customer needs and wants which will allow them to be competitive.

Which one to do first

Both quantitative and qualitative market research can be conducted first. The method to choose first is dependent on the following;

Qualitative market research should be conducted before quantitative market research if the project concept has not previously been researched. In this situation qualitative market research will enable the researcher to understand the consumer's initial and unbiased reaction and opinions to the new concept with no external influencers such as past experience with similar products. It is important with a new concept to first understand areas of improvement, modification before moving forward towards validating the final concept through quantitative market research.

Quantitative market research should be conducted before qualitative market research if the project concept has been previously researched to some extent and some initial information from previous research has been absorbed. By conducting quantitative market research first, it allows a start-up or entrepreneur to understand the current feasibility of a project before understanding why the results read as they do. Quantitative market research highlights areas of further investigation before exploring the reasons through qualitative market research. Further to this quantitative market research allows the researcher to gauge a general understanding of the market before taking the time to adapt their research into a more specific and customised survey as part of qualitative market research.

Types of Data Collected:	Quantitative	Qualitative
Advantages	• Broader study, involving more people studied; • Greater objectivity and accuracy of results; • Easier to summarize and make comparisons; • Avoids personal bias	• Provides depth and detail; • Creates openness; • Stimulates people's individual experiences; • Avoids pre-judgements
Disadvantages	• Collect a more superficial dataset; • Numerical descriptions are limited; • Unnatural, artificial environment yields laboratory results which may not correspond to real world results; • Standard questions may lead to "structural bias" and false representation	• Fewer people studied; • Less easy to generalize; • Difficult to make systematic comparisons; • Dependent on the skills of the researcher

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Research instruments (seminar)

The most common research instrument is the questionnaire. Keep these tips in mind when designing your market research questionnaire.

When market research goes wrong, it's usually the result of a poorly designed market research questionnaire.

(article continues below)

When designing market research instruments, follow these market research tips to ensure that you get the best possible results:

1. Keep it simple.
2. Include instructions for answering all questions included on the survey.
3. Begin the survey with general questions and move towards more specific questions.
4. Keep each question brief.
5. If the questionnaire is completed by the respondent and not by an interviewer or survey staff member, remember to design a questionnaire that is graphically pleasing and easy to read.
6. Remember to pre-test the questionnaire. Before taking the survey to the printer, ask a few people-such as regular customers, colleagues, friends or employees-to complete the survey. Ask them for feedback on the survey's style, simplicity and their perception of its purpose.
7. Mix the form of the questions. Use scales, rankings, open-ended questions and closed-ended questions for different sections of the questionnaire. The "form" or way a question is asked may influence the answer given. Basically, there are two question forms: closed-end questions and open-end questions.

Close-End Questions in Market Research Surveys

With close-end questions, respondents choose from predefined answers that are included on the questionnaire. Types of close-end questions include:

- Multiple choice questions that offer respondents the ability to answer "yes" or "no" or choose from a list of several answer choices.
- Scale questions that ask respondents to rank their answers or measure their answer at a particular point on a scale. For example, a respondent may have the choice to rank their feelings towards a particular statement. The scale may range from "Strongly Disagree", "Disagree" and "Indifferent" to "Agree" and "Strongly Agree."

Presentation of research plan (workshop)

The Workshop will be presented by the trainers.

Week 5. INFORMATION IN MARKETING

What is Information and in Marketing (lecture)

Plan:

1. Marketing Information System
2. Competitive Intelligence

1. Marketing Information System

Definition: The Marketing Information System refers to the systematic collection, analysis, interpretation, storage and dissemination of the market information, from both the internal and external sources, to the marketers on a regular, continuous basis.

The marketing information system distributes the relevant information to the marketers who can make the efficient decisions related to the marketing operations viz. Pricing, packaging, new product development, distribution, media, promotion, etc. Every marketing operation works in unison with the conditions prevailing both inside and outside the organization, and, therefore, there are several sources (Internal, Marketing Intelligence, Marketing Research) through which the relevant information about the market can be obtained.

Fig.5.1. Components of Marketing Information System

1. **Internal Records:** The Company can collect information through its internal records comprising of sales data, customer database, product database, financial data, operations data, etc. The detailed explanation of the internal sources of data is given below:

- The information can be collected from the documents such as invoices, transmit copies, billing documents prepared by the firms once they receive the order for the goods and services from the customers, dealers or the sales representatives.
- The current sales data should be maintained on a regular basis that serves as an aide to a the Marketing Information System. The reports on current sales and the inventory levels help the management to decide on its objectives, and the marketers can make use of this information to design their future sales strategy.
- The Companies maintain several databases such as*Customer Database- wherein the complete information about the customer's name, address, phone number, the frequency of purchase, financial position, etc. is saved.

*Product Database- wherein the complete information about the product's price, features, variants, is stored.

*Salesperson database, wherein the complete information about the salesperson, his name, address, phone number, sales target, etc. is saved.

- The companies store their data in the data warehouse from where the data can be retrieved anytime the need arises. Once the data is stored, the statistical experts mine it by applying several computer software and techniques to convert it into meaningful information that gives facts and figures.

2. **Marketing Intelligence System:** The marketing intelligence system provides the data about the happenings in the market, i.e. data related to the marketing environment which is external to the organization. It includes the information about the changing market trends, competitor's pricing strategy, change in the customer's tastes and preferences, new products launched in the market, promotion strategy of the competitor, etc.

In order to have an efficient marketing Information System, the companies should work aggressively to improve the marketing intelligence system by taking the following steps:

- Providing the proper training and motivating the sales force to keep a check on the market trends, i.e. the change in the tastes and preferences of customers and give suggestions on the improvements, if any.
- The companies can also improve their marketing intelligence system by getting more and more information about the competitors. This can be done either by purchasing the competitor's product, attending the trade shows, reading the competitor's published articles in magazines, journals, financial reports.
- The companies can have an efficient marketing information system by involving the loyal customers in the customer advisory panel who can share their experiences and give advice to the new potential customers.
- The companies can make use of the government data to improve its marketing Information system. The data can be related to the population trends, demographic characteristics, agricultural production, etc. that help an organization to plan its marketing operations accordingly.
- Also, the companies can purchase the information about the marketing environment from the research companies who carry out the researches on all the players in the market.

- The Marketing Intelligence system can be further improved by asking the customers directly about their experience with the product or service via feedback forms that can be filled online.

3. **Marketing Research**: The Marketing Research is the systematic collection, organization, analysis and interpretation of the primary or the secondary data to find out the solutions to the marketing problems. Several Companies conduct marketing research to analyze the marketing environment comprising of changes in the customer's tastes and preferences, competitor's strategies, the scope of new product launch, etc. by applying several statistical tools. In order to conduct the market research, the data is to be collected that can be either primary data (the first-hand data) or the secondary data (second-hand data, available in books, magazines, research reports, journals, etc.)

The secondary data are publicly available, but the primary data is to be collected by the researcher through certain methods such as questionnaires, personal interviews, surveys, seminars, etc.

A marketing research contributes a lot in the marketing information system as it provides the factual data that has been tested several times by the researchers.

4. **Marketing Decision Support System**: It includes several software programs that can be used by the marketers to analyze the data, collected so far, to take better marketing decisions.With the use of computers, the marking managers can save the huge data in a tabular form and can apply statistical programs to analyze the data and make the decisions in line with the findings.

Thus, the marketers need to keep a check on the marketing environment, i.e. both the internal (within the organization) and the external (outside the organization, so that marketing policies, procedures, strategies can be designed accordingly.

2. Competitive Intelligence

Competitive intelligence is marketing information that helps marketers and other members of an organization better understand their competitors and competitive market dynamics. Common types of competitive intelligence include the following:

- **Product information:** Who is making products that compete with your offerings? What features or capabilities make these products attractive to prospective customers? How do these features compare to yours? How are products packaged and offered to customers?
- **Market share and penetration:** Which companies in your competitive market sell the most products to your target market, and how much do they sell? Which organizations are considered the market leaders? How is market share evolving over time?
- **Pricing strategy:** What do competitors charge for their products? What pricing structure and strategies do they use? What special pricing or discounting do they offer? How does this affect your pricing and position relative to competitors?
- **Competitive positioning and messaging:** What are competitors saying about themselves? What are they saying to current and prospective clients or other

stakeholders about your organization or products? How effective are their messages at generating interest in competitor products or diminishing interest in yours? What keywords are competitors dominating in search engines?

- **Win/loss analysis:** What proportion of new sales are you winning or losing? Why are people selecting your product over competitors'? Why are they selecting a competitor's offering instead of yours?

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Information management (seminar)

Information management is the collection, storage, dissemination, archiving and destruction of information. It enables teams and stakeholders to use their time, resource and expertise effectively to make decisions and to fulfil their roles.

Fig.5.2. Scheme of Information management

General

All projects, programmes or portfolios generate data in the course of capturing requirements, planning the work and controlling progress.

P3 management teams need to transform data into information through interpretation, analysis and presentation. They must establish information management processes and responsibilities from the start. These will usually conform to organizational standards, but any adaptation of those standards must be set out in an information management plan.

The information management process starts with data collection and creation, and its conversion to information.

The collection and creation of data takes many forms. In the early stages it will focus on capturing requirements and developing solutions that meet those requirements. It will then move on to the creation of plans showing how the requirements will be met. As the work progresses, performance data will be collected.

Data must be transformed into information that is usable by the P3 management team and stakeholders. This is made easier by adopting standard techniques to analyze the data (such as earned value management to show performance trends) and documents to present the information (such as a business case to show why the investment is worthwhile).

P3 methodologies define a suite of standard documents and many organizations develop electronic templates to ensure consistency. Key documents will be subject to configuration management and the information management plan will define how information is classified and stored.

Storage must be designed with accessibility in mind. Information that cannot be easily found is of no value.

The preparation and dissemination of information will be defined in the communications management plan. This will include ownership, access rights and timing of dissemination. As information is superseded it must be archived. Archived information needs to provide an audit trail of changes and a source of information in support of lessons learned. Some archived information may be stored in a knowledge management database that allows easy access in order to help improve the management of future work. Information that is no longer required will eventually need to be destroyed, subject to statutory requirements and organizational policy. The destruction may be for security or confidentiality reasons, or simply to prevent an accumulation of unnecessary documentation.

Information management processes must comply with related organizational, legal and regulatory standards and policies. Members of the P3 management team will each have a responsibility for aspects of information management.

The P3 assurance process will check that information is being handled in accordance with the information management plan.

Project

Information management can be seen as an overhead that takes time away from managing a project. Many project managers will lack support to help with the administrative burden and, where this is the case, the information management system should be made as simple as possible so that it can be part of the project manager's role.

On larger projects, or where the project is part of a programme, there will probably be a support function that will take care of the information management process. However, the project manager still has responsibility for ensuring that there is an appropriate information management plan in place and that it is implemented.

Where a project is being delivered by one organization on behalf of another, the project manager must be aware of different policies and conventions that affect the transfer of data and information between the two organizations.

Programme

An information management plan for a programme must address three factors:

- consistency of information management at project level;
- coordination of information management between projects and business-as-usual;
- managing programme-level information.

Consistency across projects is important for both data and information. Data consistency means using a common system for recording and distributing data. This should allow project management teams to have access to relevant information across the programme to better manage their component part. A simple example would be ensuring that all projects in a multinational programme report costs in the same currency, using the same mechanism for calculating exchange rates. Without consistency it is difficult to aggregate information to create an overall picture for the programme.

The programme management team should also ensure that all projects use the same documents, terminology and templates unless there is a compelling reason to do otherwise. This makes communication easier and more efficient.

Some data and reports will only exist at programme level. This will relate to information that is either outside the scope of individual projects, or has been created by aggregating information from multiple sources.

Programmes will often include a support function that can take responsibility for the information management process across projects.

Portfolio

Although united by a set of common strategic goals, the projects and programmes within a portfolio will have different contexts. Wherever possible a portfolio should apply a consistent approach across its component parts but this may be adapted for particular circumstances.

A portfolio support function will handle the information management process and may provide support to all or some of the projects and programmes. Responsibility for knowledge management and development of maturity is also likely to reside with the portfolio management team. Information management is closely linked with both these areas and information management in the portfolio dimension must take a long-term view to ensure that good practice is embedded in the organization.

Effective ways of information exchange for marketing (Workshop)

The Workshop will be presented by the trainers.

Week 6. ORGANIZATIONAL BEHAVIOR

Introduction to organizational Behavior (lecture)

Plan:

1. Evolution of Organizational Behavior
2. Online class in Organizational Behavior

1. Evolution of Organizational Behavior

What is Organizational Behavior?

Fig.6. Behavior scheme

In a nutshell, organizational behavior is the study of how human behavior affects an organization. Organizational behavior aims to learn how an organization operates through the behaviors of its members. Instead of taking a strictly numerical approach to determine an organization's operations, it takes a more psychological approach. By understanding people, you can better understand an organization.

Organizational behavior is intended to explain behavior and make behavioral predictions based on observations. If you can understand behaviors, you can better understand how an organization works. In addition, organizational behavior studies how an organization can affect behavior. So, if you think about it, behavior affects an organization and an organization affects behavior. Let that sink in for a second- it's all connected! They each affect the other, creating a never ending loop between the two. Therefore, in order to have a healthy and successful organization, it is extremely important to understand the ins and outs of organizational behavior!

The academic study of organizational behavior can be dated back to Taylor's scientific theory as we discussed earlier in this module. However, certain components of organizational behavior can date back even further. In this section we will discuss how organizational behavior developed into a field of its own.

Looking back thousands of years we can find components of organizational behavior. Famous philosophers like Plato and Aristotle discussed key components of today's organizations including the importance of leadership and clear communication. While these seem like very basic and broad concepts today, at the time they were innovative ideas and helped to lay the foundation for organizational behavior.

If organizational behavior were a simple topic, this course would be short and sweet. We could simply say that organizational behavior is how people and groups act within an organization. But it's not so simple!

When organizational behavior grew into an academic study with the rise of the Industrial Revolution, it began to complicate what could appear to be simple topics. People began asking a lot of questions and started critiquing how organizations operated. Like many academic ventures, people began to deep dive into how behavior plays a role in organizations and why changes in behavior alter the way organizations operate. Along the way, organizational behavior has grown to incorporate components of management, psychology, leadership, personality traits, motivation, etc.

Organizational behavior has grown into its own niche within a wide variety of other genres. This is exciting because it allows us to really investigate each and every aspect of behavior within an organization! Today, organizational behavior is recognized as an essential component of an organization. Scholars and businesses alike recognize its importance and continue to help it adapt to current issues and new findings.

One of the great things about organizational behavior is that it is constantly changing. The rest of this module will discuss contemporary issues in organizational behavior and how organizations are adapting to and learning from these challenges.

2. Online class in Organizational Behavior

Ethics-Ethics in any organization is a fairly important aspect in general, but it can strongly influence the business' overall organizational behavior. Each person will come into a business with their code of ethics that they personally follow and it can interact-positively or negatively-with the business' own established ethical code. Clashing ethics can prove problematic for the other elements of the business and can skew the balance necessary for the business' organizational behavior to be successful. Ethics can be a tricky element for the business' leader(s) and management to deal with on their own and the concept of organizational behavior can provide some much needed assistance to keep things in check. It also tends to make it harder for lapses in the ethical code to slip past scrutiny and generate problems for the business later on.

Management-Almost every part of a business can be traced back to its managerial level and the staff that control it. They often set the tone throughout the business, which can include its organizational behavior practices. Different types of management practices can in turn generate different types of organizational behavior and will undoubtedly affect the business' policies.[3] For many businesses, the role that management plays in organizational behavior can be the most substantial. They are often the ones who actively monitor the business' organizational behavior and look for any changes that may signify that there is a problem. They may also be responsible for issues that develop, as the underlying cause of an organizational behavior problem can be traced back decisions previously made by management.

Harassment-The combination of harassment and the workplace is never something that is seen in a positive light. Its presence often has a negative effect on the business' organizational behavior beyond just the victim and perpetrator of the harassment.[4] Harassment often generates an atmosphere in the workplace that can be interpreted as hostile to those trying to work there. Those who are not directly affected can be indirectly affected if they witness the harassment or interact with those involved. Such conditions may disturb the harmony in the work environment and make it difficult for the business' organizational behavior to remain in functioning form. It is cases of harassment in the workplace that show how easily the harmonious balance attached to a business' organizational behavior can be displaced and cause problems to arise.

Accountability-Accountability is best viewed as a person or organization taking responsibility for their actions and decisions, and anything caused by those.[5] The ability to do so often depends on how much control you have over a situation or your work, but it is generally possible. Active accountability can help a business continue to function effectively and maintain a healthy organizational behavior model, even in cases of mistakes and failures. It keeps things running and prevents the business from wasting time-and, often, resources-trying to find the responsible party behind a failure or success. In some cases, those who are held accountable for their positive actions may be rewarded for their efforts by the business, which can serve as a motivator for continued productivity.

Decision Making-In order for anything to get done, decisions must be made. The situation and environment in which the person is in when the need to make a necessary decision arises can impact what they choose to do or not do. As those factors are often a part of the business' organizational behavior to some degree, it's safe to say that other elements of organizational behavior shape such instances. If those elements are well-balanced and the organizational behavior is in a healthy state, employees within the business are going to be more informed and comfortable with their decision making.[6] If those conditions are lacking, then it's entirely possible that the person's decision can be biased towards their own opinions or based upon missing or incorrect information. In business, decisions are an integral part of the day-to-day operations and often are linked to one another in a series. A single decision, even a small one, can affect another decision further down the line and trigger a chain reaction if the reasoning behind it was not in the best interest of the company.

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Features and Objectives of Organizational Behavior (seminar)

The main objective of Organizational Behavior is to understand the human interactions in an organization, find what is driving it and influence it for getting better results in attaining business goals. The organizations in which people work affect their thoughts, feelings, and actions. These thoughts, feelings, and actions, in turn, affect the organization itself. Organizational behavior studies the mechanisms governing these interactions, seeking to identify and foster behaviors conducive to the survival and effectiveness of the organization. Organization behavior's objective is to set up an organizational culture, hiring the best people and creating meaningful connections among them, resolving the conflicts, developing the qualities of the employees, and establish a firm and clear leadership chain.

Objectives of Organizational Behavior

The main objective of Organizational Behavior is to understand the human interactions in an organization, find what is driving it and influence it for getting better results in attaining business goals. The organizations in which people work affect their thoughts, feelings, and actions. These thoughts, feelings, and actions, in turn, affect the organization itself. Organizational behavior studies the mechanisms governing these interactions, seeking to identify and foster behaviors conducive to the survival and effectiveness of the organization.

Organization behavior's objective is to set up an organizational culture, hiring the best people and creating meaningful connections among them, resolving the conflicts, developing the qualities of the employees, and establish a firm and clear leadership chain.

It has identified 8 objectives of organizational behavior:

1. Job Satisfaction
2. Finding the Right People
3. Organizational Culture
4. Leadership and Conflict Resolution
5. Understanding the Employees Better
6. Understand how to Develop Good Leaders
7. Develop a Good Team
8. Higher Productivity

Job Satisfaction

Understanding organizational behavior can shed light on the factors that can foster or hamper job satisfaction, such as physical settings, organizational rewards and punishments or work-group characteristics. Job satisfaction, in turn, can foster higher productivity and reduced turnover, while providing more leverage for the recruitment of top talent.

Finding the Right People

A ship with all sails and no anchors would flounder, one with all anchors and no sails would not get anywhere. Organizational behavior can help find the right mix of talents and working styles required for the achievement of the task at hand. This can assist in deciding who to include in a team or task force, as well as in deciding who to promote to a leadership position or even the ideal profile for new hires.

Organizational Culture

As organizations grow larger, it may become difficult to keep a sense of common purpose and unity of direction. Organizational behavior is useful for understanding and designing the communication channels and leadership structures that can reinforce organizational culture. As rapidly evolving business environments force organizations to adapt, entering, for example, into global markets or utilizing virtual workforce, organizational behavior can assist in maintaining a clear identity without losing flexibility and adaptability.

Leadership and Conflict Resolution

Playing by the book and not making waves may be fine for some organizations, but the command-and-control mentality of the manufacturing age may become counterproductive in the knowledge market. Organizational behavior can assist in fostering leadership, pro-activity and creative problem-solving. When creativity is allowed, the divergence of opinions is unavoidable, but organizational behavior can provide the leadership and the arbitrage dynamics required for turning conflicts into constructive idea exchanges.

Understanding the Employees Better

Organizational behavior studies help us understand why employees behave the way they do, and also thereby predict how they are going to behave m the future**.**

Understand how to Develop Good Leaders

Organizational behavior patterns help in predicting who among the employees have the potential to become leaders. They also teach us how to mold these employees so that their leadership potential is utilized to its fullest.

Develop a Good Team

An organization is only as good as the weakest member of its team. All members of the teamwork in coordination and must be motivated to work together to achieve the best results. The teamwork theories of organizational behavior are an essential tool in the hands of any manager.

Higher Productivity

All of this leads us to the most important goal of achieving the highest productivity in realizing the visions and goals of any organization. If implemented well, the organizational behavior principles help in motivating all the members to do their best. The levels of motivation can be the difference between a good and a bad result. Organizational Behavior has so many objectives by which it serves the organizations, individuals, groups and in a word all the stakeholders.

Challenges & Opportunities of Organizational Behavior (Workshop)

The Workshop will be presented by the trainers.

Week 7. COMMUNICATIONS STRATEGY IN MARKETING

Introduction Communications Strategy in Marketing (lecture)

Plan:

1. Types of Plans
2. Strategic and operational planning
3. Marketing/Communications planning

1. Types of Plans

The various types of plans within the marketing and communications disciplines are structured hierarchically:

The activities of an organization start with a business plan, leading to a marketing plan, followed by a marketing/communications plan and a communications plan (advertising and/or media plan).

Fig.7.1. Hierarchy of plans

The business plan sets out the objectives for the entire organization according to a specific time frame. Those objectives are quantitative as well as qualitative. A few examples: return on investment, competitive targets, efficiency targets and corporate social responsibility goals. In order to bring the business plan to fruition, multiple execution plans are described for sectors such as finance, human resources, marketing and innovation.

The marketing plan contains marketing goals and the strategy to achieve these goals, as in gaining market share, number of products and distribution channels. The marketing plan is the starting point for the marketing/communications plan to determine how and with what tools and resources will marketing goals be achieved. Finally, the communications plan describes how to communicate with various interest groups/stakeholders.

The first two plans in the hierarchy above are strategically oriented, while the last two have an operational perspective. The strategic planning captures the implementation of overall direction. An operationally oriented planning strategy makes it distinct. An operational plan is a normative plan to achieve an intended result. A strategic plan has a much broader horizon than the other ones.

2. Strategic and operational planning

SOSTAC®, developed by P. R. Smith, is a method used to provide a structure for developing a plan. This method was originally developed to support the process for realizing a marketing plan and is mainly used as a framework for the creation of online planning (Figure 7.2).

SOSTAC stands for Situation Analysis – Objectives – Strategy – Tactics – Actions – Control.

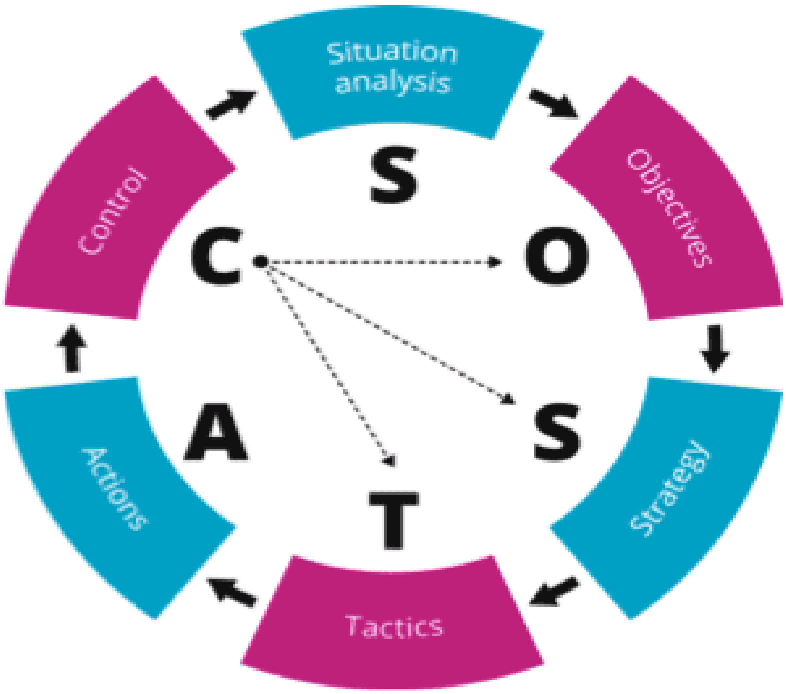

Fig.7.2. SOCTAC method

In this methodology, the objectives are divided into broad strategic goals that incorporate specific KPIs (Key Performance Indicators). In daily practice, however, the KPIs can only be determined when the target audience, the proposition and positioning choices are known. Also essential is determining what tools and marketing techniques will be used. There are differences in the strategic and operational plans that Smith's SOSTAC® does not distinguish between.

Topics in a strategic plan are general. Performing an *analysis*, determining *objectives*, targeting a *group*, determining direction by means of a *strategy*, setting a *budget*, determining the *implementation* and the manner of establishing *control*.

At an operational level are the topics: analysis, strategy, concept, implementation, and evaluation. There are basic similarities in terminology between strategic and operationally oriented plans. However, the level of abstraction determines the content and meaning of the term. In a communications plan, the term "strategy" is in the concept phase. The explanation of the term strategy here is whether we are going to employ humor or product comparison in our communication tool. The term strategy in a marketing plan means, for example, the choice to position new products in existing markets.

The differences between the operational and the strategic plans are:

1. Specifically naming targets. With a strategic plan objectives are explicitly mentioned as a phase, but not in an operational plan.
2. Explicitly name a target group.
3. The strategy step is of a different order in a strategic plan than in an operational plan. The determination of a strategy is the direction taken in order to achieve the goal. For example, a strategic plan involves the direction in which the company is going. The strategy in an operational plan involves the choices of which communications tools are being used.
4. In a strategic plan, management of the plan is called "control", while in an operational plan it becomes "evaluation".

3. Marketing/Communications planning

The development of a marketing plan can be done on the basis of a strategic method, such as P.R. Smith's SOSTAC®. There are, however, two disadvantages:

Firstly, the determination of the problem must be considered a given and not a part of the methodology. It is precisely the problem framing the direction and the size of the solution.

The second disadvantage of existing methods is that it can be used in strategic planning but not in an operational plan is setting goals or objectives. Determining the goals in an operational plan will take place after analyzing the situation/environment and not before.

The PASTA method

In daily practice, the SOSTAC® method is not workable in developing an operational plan, as described above. The logical process is interrupted by first setting goals and then the strategy. On a strategic level, this is obvious.

For example, a company's objective is to grow in market share, but it must make a strategic choice: Innovate? Buy another company? Or just obtain more market share?

In an operational plan, objectives are part of the strategy. And the SOSTAC® method is not practical because problem recognition is not an explicit part of the method.

The PASTA method can be used to develop an operational plan (see Figure 7.3): Problem definition - Analysis - Strategy - Tactics - Action (PASTA)

Problem Definition

First, there must be a clear definition of the problem: Which goal does the client want to achieve? What issues are involved? What strategic objectives underlie the development of a plan?

There must be knowledge about the organization, product or service. But also knowledge about what the client is really asking for. When an organization indicates low brand recognition, it is justified in asking more questions to seek out the reason why.

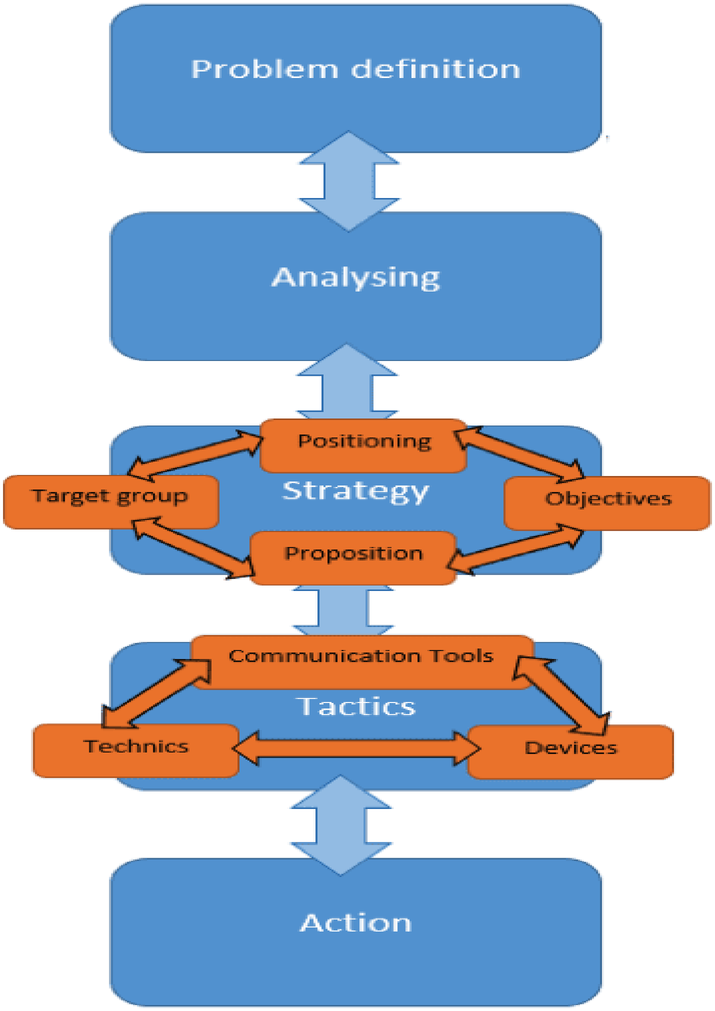

Fig.7.3. PASTA method

Analysis

The second step is to analyze the market and the environment in which the organization or the product exists. To create an operational plan, there must first be an examination of the organization, consumers or customers, the product (supply) and competition.

This consists of both internal and external analysis. For internal analysis it is important to ask questions such as:

- What is the organization?
- Who does what?
- What problems does the organization have?
- What is the organization's volume of sales, customers, calls and web traffic?
- What are the company's strengths?
- How does the public identify with the organization or the product?
- What are the tangible and intangible values of the product (value proposition)?

The external analyses are more extensive. Most of the information will come from desk research or existing and available information within the organization. Questions to be answered are:

- How is the market within which the organization operates defined?

- How many consumers use the product? What is the market size?
- Who are the customers or users?
- What interest groups are important?
- What is the consumer behavior?
- What does the decision-making process regarding the product look like?
- Who are the competitors?
- How do the competitors act online?
- Which search engine is important?
- How do referrers act?
- Which online actors are important?
- Who could be an online partner?
- What are the major blogs on the subject?

Strategy

The term "strategy" is comprehensive and confusing. It should be regarded within the context of an operational plan. The term "concept" can also be used in place of strategy. The development of a strategy or concept within an operational plan consists of four modules, which are interdependent. These building blocks are: target group, objectives, proposition, and positioning.

Target Group

- Which consumer segment is important?
- How is the target group defined?
- What are the needs of the target group?
- To what extent is the target group involved in the product? What about the Decision Making Unit (DMU)?
- What are advantages the target group is looking for?
- What is important to the product for the target group?
- Which media is the target audience using?
- Who are involving partners?
- How is the target group normally informed?
- What is the target group reading?
- What are the communications tools and channels they are looking at?

The better the target group is known, the better the strategy that can be worked out. Many questions can be answered using desk research. Discussions and interviews with members of the audience or an observation of the target group can also provide a lot of information.

A description can be made by creating a Customer Profile, which consist of the "Customer Jobs" (description of what the customers want to achieve in daily life), "Customer Gains" (description of the results that customers want to reach and the concrete benefits they want to see) and "Customer Pains" (description of the negative outcome, risks and barriers that are related to the job).

Objectives

What should the campaign achieve? Marketing/communications objectives can be broadly divided into three categories: "Reach" goals, "Process" goals and "Effectiveness" goals. The Reach goal of communicating is to reach the target groups in an effective and efficient way. For this purpose a good segmentation and audience definition are needed, as well as insights into the media behavior of the desired segments.

Process goals are conditions which should be established before any communications can be effective. All communications should capture the attention of the target group, then appeal or be appreciated, and be processed (remembered).

The third type of goals are the Effectiveness goals. They are the most important, since Reach goals only assure sufficient exposure, and Process goals only ensure enough processing of the message to make the Effectiveness goals possible. An Effectiveness goal is a behavior goal: Buy, download, registration etc. An Effectiveness goal is the ultimate goal: to enter into a long-term relationship or obtain a growth in market share.

Positioning

"Positioning" is the creation of a distinctive position relative to the competitors in the perception of the consumer. When an organization wants to determine positioning, it is important to have done a good competitive analysis.

An organization can choose an informational Positioning focusing on the functional attributes and benefits of the product: the product is the best solution, or the price is most favorable, or the delivery terms are the best. There can also be choice of a transformational Positioning. That responds to the needs of the customers to purchase a product. When products have many similarities, the transformational Positioning can provide a good solution. For example, values such as "sociability" and "convenience" are being used. When using a two-sided Positioning, there are functional aspects which are connected to the values and needs of the customer.

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Proposition

If the target group is known and Positioning is determined and it is clear what needs to be achieved, then a central message and values (Proposition) can be determined. The Proposition is the aggregate offer which can be separated into product, price, distribution (which channel?) and the communicative value of the offer. The value Proposition is shaped by the visible and invisible benefits to the consumer.

Tactics

The next step is to determine which devices, tools, and techniques are to be used. What communication tools and devices (channels) are used to achieve the goal? The channels are the traditional channels such as print (newspapers and magazines) and television, augmented by digital devices (desktop, laptop, tablet and especially the smartphone with internet access).

The tools are the traditional instruments such as advertising, sales promotions (brand activation, direct mail and retail promotion, augmented by typical Internet tools such as the website, the app, email-marketing, bannering and mobile marketing.

The techniques are specific and unique to the internet, such as search engine marketing (traceability), behavioral targeting (communications offering based on the behavior of the user), and affiliate marketing ("sellers" are rewarded based on units sold). Within the Tactics phase, devices and tools and techniques are to be weighed to determine which can be used to achieve the target within the strategy.

Action

Once all the tools and resources have been established, the content for the tools is to be developed to actually carry out the messages. The ads (e.g. AdWords) must be created, the e-mail campaign must be designed, the website should be developed, etc., etc. This step is about creating a schedule, determining a budget and designating people.

- Time: Making a timetable
- Money: How can the budget be used? Which channels must be chosen for exposure?
- People: Who has the expertise to design a tool? Is the developing outsourced?

Examples include a keyword plan, a content plan for social media, sites for link-building and a planning schedule.

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Marketing Communication Channels and Tools (seminar)

What is a marketing communications channel?

A marketing communications channel, also sometimes referred to as a media channel, is a delivery vehicle to your customers for your message or offer. It is just one element of a successful marketing campaign, albeit an important one. Combined with your messaging and the right creative for the channel, it can resonate with your ideal customers and encourage them to do business with you.

All media channels can work. All can fail as well. It depends on how well you integrate and deliver the important pieces of the marketing campaign.

Examples of marketing communications channels

Traditional media channels include:

- Print publications

- Radio
- Television
- Billboards
- Signage
- Telephones
- US Postal Service
- Events

Digital marketing channels include:

- Websites
- Blogs
- Podcasts
- Social media
- Email
- Video
- Mobile
- Webinars

Marketing strategies for communications

Marketing strategies are the types of communication you do to get your message in front of your target market using the most appropriate channel. For traditional media channels you could choose:

- Paid advertising
- Direct marketing
- Word of mouth
- Events
- Public relations
- Partnerships and joint ventures

For digital marketing, these are example strategies you could invest in:

- Inbound marketing
- Content marketing
- Email marketing
- Search engine optimization
- Local search
- Social media
- Paid advertising
- Mobile marketing
- Affiliate marketing

Combining a selection of these strategies across multiple online and offline channels, referred to as multi-channel marketing, can help all businesses build brand awareness and reach more of your ideal clients.

How to determine the best marketing communication channels

For most small businesses, choosing the best channels will be dictated by your marketing budget. The good news is a lot of online marketing can be done with a smaller, more reasonable budget. For what some businesses used to pay for an ad in the Yellow Pages, you can do a good amount of online marketing.

Every business benefits from a multi-channel marketing strategy to increase their visibility to their target audience. Although these are all viable options in your marketing plan, not all of these strategies will necessarily apply to your business.

Inbound Marketing

Inbound marketing can be very effective to build awareness, generate leads and convert those leads into paying customers. This combination of search, social and content marketing should be in the marketing plan for most small businesses.

PPC Advertising

PPC can drive conversions depending on what you are selling. The best use for small businesses is to generate leads. Most people who click on an ad in the search results are researching and looking to buy. If you do choose to run PPC ads on Google Ads, Facebook or other social media platforms, make sure you work with someone who knows what they are doing. A poorly designed campaign can cost you a lot of money with little to no results.

Videos

Videos via YouTube can appeal to many researching how to solutions. You can build a quality channel with many educational videos that can help you become the expert in your field. Videos can also be used on Facebook and other social platforms to engage and educate your audience. You can create some quality videos using your phone or tools like Zoom.us.

Event Marketing

Events can be held in person or virtually via webinars. The cost of web conferencing has made webinars and virtual events possible for all businesses. Again, with tools like Zoom.us, you can record your webinars and make them available as lead magnets within your content strategy.

Word of Mouth / Referral / Reputation Management

Most businesses benefit from a word of mouth strategy, using in-person networking events and social media. Online reviews and recommendations can help businesses get more local online visibility. Develop a referral strategy that includes having your customers leave reviews on Google and other review platforms. Make sure you heed the terms of service of each review platform.

Direct Marketing

The success of direct marketing using postcards, letters, telephone or email will vary from business to business, but controlled postcards and letter campaigns do work for businesses trying to reach homeowners for services that the may forget they need. Telemarketing is pretty much ineffective in most cases these days.

Successful marketing campaigns will usually employ strategies across multiple channels to ensure the message reaches your ideal client. But note that not all channels carry the same weight when it comes to how valuable the connection is to your business. For example, someone who subscribes to your email list is more valuable than someone who likes your Facebook page or follows you on Twitter. Therefore, it is important to know what the goal of your marketing activity is in order to choose the best channel for your needs.

Why is this important to understand?

Knowing where you can best reach your target audience is important. Then you can deliver your message to them using the right marketing strategies and their preferred communications vehicle.

For a business to develop a quality marketing communications plan, you need to understand the:

- Goal of your campaign (i.e. brand awareness, leads, sales)
- Target audience you wish to reach
- Value your product or service provides
- Message you want to communicate
- Best communication channel (the media) that makes the most sense for your particular target audience.

Successful marketing happens when you send the right message and reach the right market using their marketing communication channel (medium) of choice. Picking the right marketing communication channel for your message will contribute significantly to the success of your message reaching your market.

Challenges & Opportunities in Communication Strategies (Workshop)

The Workshop will be presented by the trainers.

Week 8. DIGITAL MARKETING

Digital technologies in Marketing (lecture)

Plan:

1. Create a Social Business. The Innovation Cycle. Understand the Conversations That Matter.
2. Consider the Workload. Active Listening. Touchpoint Analysis.
3. Social CRM and Decision Support. The Customer Point of View (POV). Map the Social Graph.
4. Integration of Listening. Customer Support and Social CRM. Activate Your Customers: Control vs. Leadership. Collaborative Processes.

1. Create a Social Business. The Innovation Cycle. Understand the Conversations That Matter

Collaboration in the context of social business means several things. First, it means working together, which is pretty obvious. Less obvious is *who* is working together. Social business implies a collaborative process not only between the business and its customers, which is tough enough, but also within the business itself—across "silos"—and between individual customers. Using the combination of conversations and active listening to guide your business planning process is a logical-but deceptively simple-approach to social business. More often, the processes of organizational change, of breaking down silos, and of appropriately sharing and exposing information quickly and widely present the real challenges. It is critically important not to repeat the business mantra that goes "Our customers are at the center of everything we do" *while operating largely without their input* and without formally integrating your customer's experiences, thoughts, and ideas into your internal business processes. Only when this occurs—when customer ideas and inputs are brought into the business or organization in a visible, meaningful way—is it a "social business."

The key to combining listening data, obtained via support forums and similar applications, and other information gathered through direct connection with your customers is that this needs to be connected to your business strategy and the processes that surround it. In other words, traditional marketing is largely focused on market study (both pre and post) that informs a *message*. Listening—in the simple sense— conveys back to you the degree to which that message was consistent with the actual experience of customers and stakeholders, including in venues that you may not have originally envisioned.

For example, an outbound marketing message may claim to be "Created for working mothers like you!" If it also turns out that the fi rm does not equitably promote women within the workplace, this contradiction will inevitably become known, very likely being spread through social channels. This raises the requirements for *active listening* and the incorporation of customer feedback into your business processes:

Without a strategic basis for participation, any involvement in the Social Web will be limited to listening (but not responding) and using platforms such as Twitter or Facebook for talking (as opposed to participating). Neither of these is optimal, and neither will result in the desired outcomes.

The Innovation Cycle

The combination of social-media-based marketing and the application of Social CRM is powerful. Connecting customer intelligence and what is learned through active listening deeply into your business results in a customer-driven innovation cycle.

Driving your business or organization according to your business objectives is always your end goal. In combination with an understanding of your audience, your business objectives are what dictate the specifi c actions you need to take. The use of social technologies to create a presence for your brand on the Social Web—whether though a smart application that a community fi nds useful or a space of your own built around your customer's lifestyles—creates a durable, relevant connection to the Social Web. Social CRM is the complementary connection for your business: Social CRM tools like ideation platforms and support communities encourage customers to provide insights, thoughts, and ideas on how you can better serve them. This is precisely the information you need to succeed over the long term.

Social CRM sits at the core of this cycle—see for example the work of Esteban Kolsky. It is *repeated innovation*-not one-off hits-that drives success. The Apple iPod is a great example. The first models launched in the early 2000s bear only passing resemblance to the wide range of devices comprising the iPod family and to the ultrasleek, button-free iPod Video models available in the market now. The iPod's marketshare stands at around 75 percent: What other proof of the value of innovation does one need?

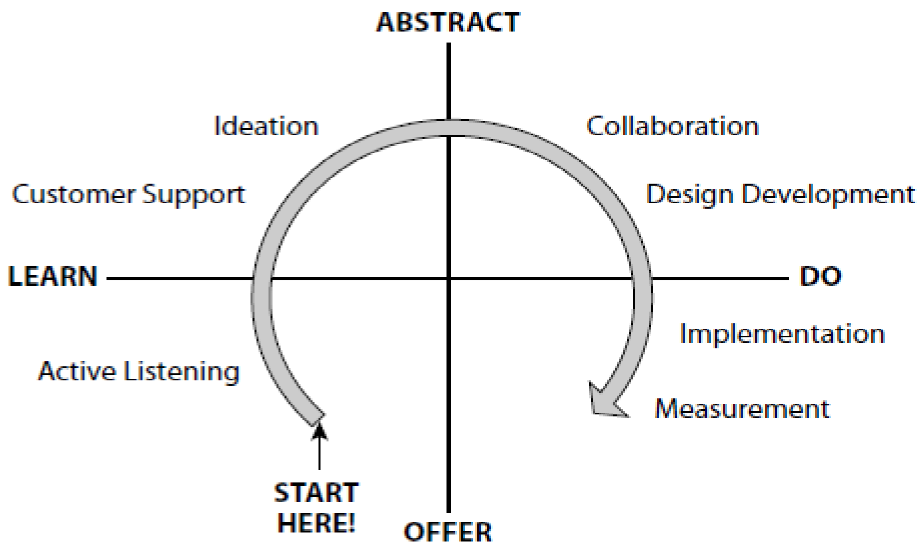

Fig.8.1. Innovation and Social Engagement

The connection between innovation and social engagement is directly applicable to social business and its attendant processes, including Social CRM. This relationship spans the stages of learning, applying the ideas gained to design, and then iterating to steadily improve (sometimes in radical steps) what is offered to customers or causerelated constituents in the marketplace. This is what makes Social CRM different from traditional sales-cycle-oriented CRM: It’s the addition of customer-powered *collaborative* participation that powers Social CRM and the realization of a social business.

Without collaborative processes, Social CRM quickly devolves to a more standard company-driven marketing and business development effort.

It is important to understand the requirement for collaboration in creating a social business: Otherwise, it’s easy to fall into the trap of “this (Social CRM) is the same as what we’ve been doing…only now our customers are a formal part of it.”

The problem with this kind of thinking is not that there aren’t analogies to existing processes—there are, just as there would be in any business process evolution. Rather, it’s because the “same as...” is exactly the excuse used to avoid substantive change inside your firm or organization, an excuse that inertial forces within will desperately seek. Does this sound like an overstatement? It’s not. As with any other aspect of business transformation, moving toward a social business mindset involves fundamental process change and recognition of the need for collaboration across many fronts. This *is different*, and it is important to set these expectations early on.

Getting Social CRM right—and successfully applying it to your business to create a genuinely collaborative relationship that leverages customer insight-depends *more* on creating an internal culture around change, around collaborative workflow, and around processes like ideation than on the implementation of any particular toolset. In my social media marketing workshops, for example, the workshops and exercises do not begin with social media tools: they *end* with them. The workshops begin with an explanation of business objectives and customers and the dynamics of the Social Web. With such an understanding in place, it’s easy to choose the particular tools that are most likely to produce the desired results. Starting instead from the point of view of tools, the result would be an endless chasing of me-too ideas. Sometimes this approach works, fair enough, but more often this copy-cat approach doesn’t.

Adoption of Social CRM follows the same rules: Without an underlying, business-driven framework, your efforts to redefine your innovation process will quickly die out. Social CRM directly impacts the management and decision-making processes within an organization by connecting the experiences that form around the products and services delivered to the marketplace with the business processes that create and sustain them. Product and service innovation, where ideas become reality, is certainly part of it. So are customer-support processes, where the post-purchase issues that inevitably occur are sorted out. So too are your HR department, your supply chain, and your delivery network. You get the idea.

When choosing a Social CRM toolset, start with your business, your culture, and your internal processes to create the overall platform that provides the connections to your customers, that supports the formal processes of active listening, and that encourages your customers to share their ideas on how they'd like to see your business evolve based on their own experience with your product or service.

Understand the Conversations That Matter

Listening to the conversations in your marketplace is the starting point in becoming a business that deeply integrates customer input. The application of more rigorous analytics to these conversations yields clues as to how an organization might use this input to improve a product or service. It also reveals *why* the highly recommended crossfunctional work team approach to managing the Social Web is so essential.

Listening is an intuitively sensible starting point in a social business program and is largely risk-free. Unless you make it known otherwise, no one knows you're listening except you! As a further motivator, your customers and stakeholders will almost surely recognize when you are *not* listening. If you've ever hollered for help in an empty room, you know how obvious it is—and what it feels like—when no one is listening. Even worse, customers who are nearby—in the social sense, meaning part of the conversation or closely connected to the person(s) at the center or it will also notice any lack of response. Given a comment that warranted attention, they will likely join in and amplify it, and will themselves draw a similarly negative conclusion if there is no response to the comment from an appropriate person within the firm or organization cited in the comment.

Listening is also generally noncontroversial within your organization. Listening does not *itself* oblige you to do anything with what is heard. This can play to your advantage when first starting out. A great use of listening, especially at the start of your social media and social business programs, is to bring your organization up to speed on what people are saying about your brand, product, or service *before* you actively engage your customers through social technologies. Like *not* listening, however, *not* responding also sends a message to your audience. Plan to participate not-toolong after you've started listening; prioritize and address the conversations that you can respond to most easily.

Taken together, *listening* is by far the easiest entry into understanding what the Social Web is all about. By listening—and in particular when using a dashboard-style monitoring tool—you can quickly see what is being said about your brand, product, or service. Moreover, you can do the same for your industry and competition—all of which is great intelligence, even if it's qualitative. From that base, you can gain solid insights into how your audience perceives you, in the context of your industry.

Based on this kind of upfront work and analysis, and with an understanding as to where these conversations are taking place, you can introduce the rest of your organization to the Social Web in a way that makes the connection to the business obvious.

2. Consider the Workload. Active Listening. Touchpoint Analysis

If you've ever looked at conversational data pulled from the Social Web-perhaps you've tried Google Alerts, for example—you're no doubt thinking "Sounds great, but who's going to filter through all of this?" If you've got a small brand, or you're in an industry that isn't talked about a lot, or you are a professional services consultant, realtor, or similar; you may have relatively few conversations that are of interest to you or require your attention. If you're Coke or Boeing or Bank of America, and in particular if your industry is in the news currently or is otherwise talkworthy, you may find yourself facing hundreds (or orders of magnitude more) of conversations daily. To get an idea of just how seriously businesses are taking social analytics, use Google to search for "Gatorade social media mission control." It's an amazing installation (myself having worked in Mission Control with NASA/JPL) from a technological perspective and a solid testament to just how important social analytics and understanding what is happening on the Social Web has become.

That's the catch to all of this "free data." For well-known brands or cause-related groups, and increasingly for many smaller brands and organizations, the amount of data can be overwhelming. Someone has to filter through it.

Hopefully, that someone is not you. If it is, and in all seriousness, even it's not, there are tools available that make this work much easier.

Just as a social analytics dashboard, for example, will save you work by automatically displaying selected KPIs (Key Performance Indicators) around conversations in an organized and revealing manner, and as well automatically routing conversations and discovered issues to the departments where they can be acted on is an essential efficiency in making effective use of conversational data. This is where workflow enters the picture, and where you begin to transition from "listening" to "active listening" and from generally "free" to generally "paid" social analytics tools.

Active Listening

Active listening, a term coined by Rohit Bhargava, implies integrating what is being talked about *outside* of your organization with the processes *inside* your organization that are driving those conversations. In other words, it means listening intently enough that you actually understand not only what is being said, but how and why it came about, and formulating at least a basic idea as to what you will do next because of it. The implication here is deeper than what social media marketing would typically consider: The ensuing analysis and response will more often than not involve the entire organization, or the better part of it.

Consider the case of Freshbooks, a small business billing and time tracking service.

Freshbooks makes a practice of paying attention to its customers, including what they are saying on Twitter. One post in particular caught their attention: Freshbooks customer Michelle Wolverton had been stood up on a date. Freshbooks' response, shown in Figure 8.2, taken from social media pro Erica O'Grady's series on using Twitter in business, got right to the point: "*We* would never stand you up." But then they did one better: Michelle is a Freshbooks customer, so Freshbooks sent Michelle fresh fl owers. The result is near-legend status on the Web. Google it.

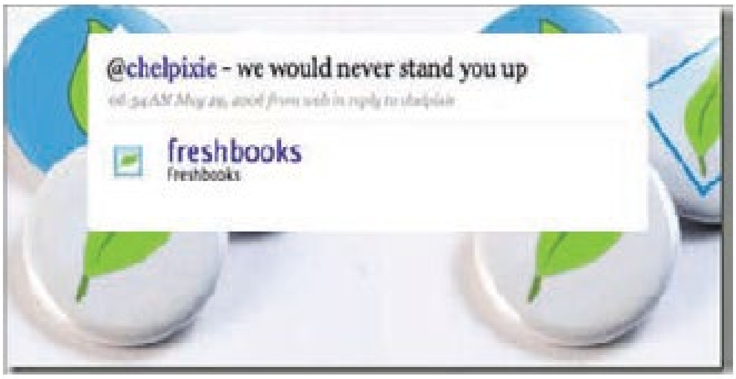

Fig.8.2. Freshbooks would never stand her up

The point of the Freshbooks example is this: Listening alone didn't win Freshbooks praise. Instead, there was a process inside Freshbooks-at an operational level-that fl exibly provided for an appropriate response to customer conversations. It is the combination of listening, understanding customers, and enabling the organization to respond effectively and in a talkworthy manner that is really at the heart of the Freshbooks' example.

One may argue that "Freshbooks is a small business" or "If Freshbooks sent flowers to everyone, they'd be out of business." To the first objection, the counter is that plenty of small businesses could not have done this *even if they had wanted to*.

Freshbooks actually did it, and in a timely manner. Freshbooks' internal process- not their marketing campaigns-facilitated their talkworthy response. To the second point, the counter is *they only have to do it once in a while* to advance in the eyes (and hearts) of many of their customers. There is no expectation that every Freshbooks customer will get flowers. Instead, there is an expectation that Freshbooks consistently recognizes and cares about its customers. Freshbooks is free to express this in any way it wants, whenever it chooses. Consider the similar practices at Zappos: They've built a billion-dollar business by doing things that were sometimes more expensive-free shipping, *both* directions and occasionally even overnight shipping upgrades-"just because." Creating customer delight is a proven business builder.

Touchpoint Analysis

Touchpoints are my passion. As a product manager, I was immediately drawn to the simple reality that everything I did in terms of product design came down to one customer moment. That moment is, of course, the point in time when a customer uses and experiences some aspect of the product I'd designed or brought to market. That moment, and only that moment, is the single truth that exists from the customer's perspective.

What happens when your customer plugs it in, turns it on, calls with a question, or shifts it into drive.

These points of intersection between the customer's world and the brand, product, or service are what I refer to as *touchpoints.* They include marketing touchpoints-a commercial that someone sees on TV that elicits an emotional response as well as operational touchpoints, such as the feeling you get walking into a Whole Foods Market.

Touchpoint analysis is often presented from a marketing perspective but is applicable nonetheless across the organization. The key to applying this analytical methodology lies in understanding your firm or business-how it operates-and in knowing what your customers consider important and talkworthy.

The combination of talkworthiness and importance comes about because conversations don't happen when no one cares to start them. Recognize here that some aspects of any product or service may not be talkworthy (but they are still required-by law or regulatory rule for example-or in some way essential to the actual delivery of the service or the functioning of the product. For the aspects of your product or service that are both important *and* talkworthy, touchpoint analysis provides a method to analyze and prioritize how you go about applying what you learn on the Social Web to building your business.

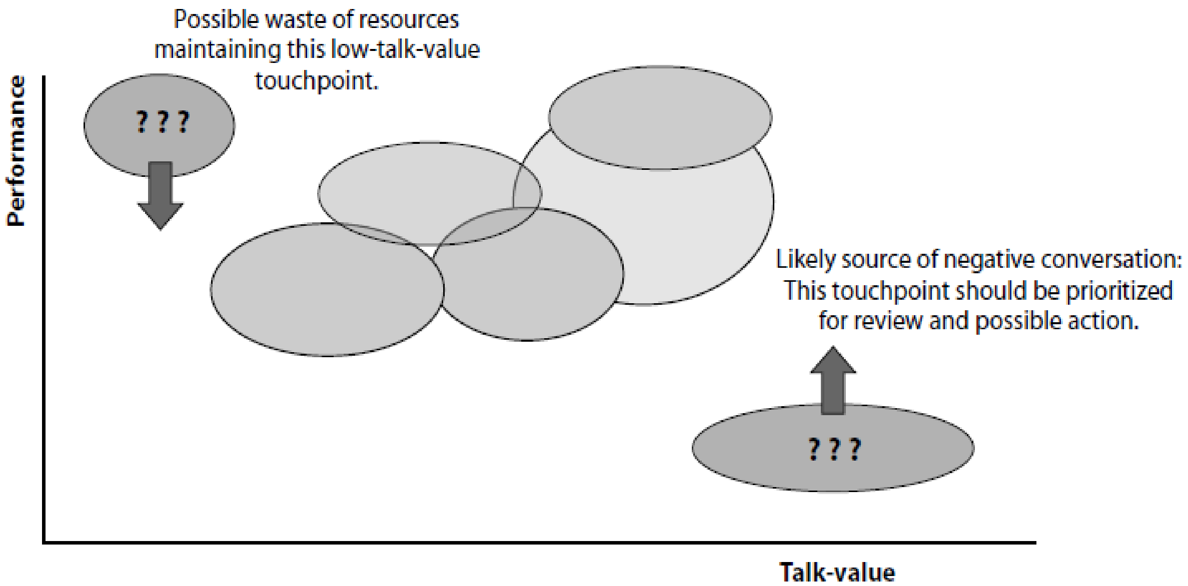

Fig.8.3. Touchpoint Analysis and Response Prioritization

Look more deeply into touchpoint analysis. The experience I opened the book with involving Continental Airlines and separately the Bengaluru International Airport are great examples of touchpoints done right. Add to that the Freshbooks' example and the general "customer delight" practices at Zappos. It's important to understand that across these very different businesses-of very different sizes and operating environments- the same basic practice exists: an emphasis on creating specific, tangible moments of delight that customers are very likely to talk about.

3. Social CRM and Decision Support. The Customer Point of View (POV). Map the Social Graph

Tracking and measuring the dynamics of a marketplace conversation to understand sources of infl uence, spot problems, and create loyal advocates is largely what drives the current interest in social analytics. Beyond this, connecting the impact-or more correctly, the *underlying cause*—of these conversations deeply into business processes defi nes the emerging discipline of Social CRM.

Social CRM includes the following fi ve elements:

• A genuine effort on the part of the firm or organization to understand and consider the point of view of its customers and/or stakeholders, for whom the business or organization exists.

• An understanding and mapping of the social graphs, communities, and the social applications that connect individuals within your overall audience to *each other* (rather than to you) and thereby gaining an insight as to *how you fit into their world*.

• The identification of the *specific* difference between the activities your customers want to take ownership for versus those in which they look to you for guidance, relief, assistance, and similar contributions from you that improve their quality of life.

• The optimization of your commerce or conversion processes given the role of customers and stakeholders in the conversations that impact conversion.

• The connections—*touchpoints*—between your activities and those of your customers with the internal business processes that drive the experience that occurs at those touchpoints.

Table 8.1

Social CRM and Decisional Building Blocks

Social CRM Element	Applicable Technique	Example Platform
Understanding the Customer Point of View	Social Analytics and Rigorous Assessment of Conversations	Alterian SM2, Nielsen | Buzzmetrics, Oxyme, Radian6, SAS Institute, Scout Labs, Sysomos, TNS | Cymfony
Mapping Social Graphs	Source Identification and Social Status	BuzzStream, Sysomos, Gephi
Differentiating Control versus Leadership	Support Communities and Expert Identification	Lithium Technologies, Jive Software
Commerce Optimization	Quantifying and Tracking Ratings and Reviews	Bazaarvoice, SAS Institute, IBM WebSphere
Quantification of Customer Touchpoints	Touchpoint Analysis and Prioritization of Business Activities	Create this yourself: See Chapter 6 of *Social Media Marketing: An Hour a Day* for more.

The first column in Table 8.1 shows the basic decisional-support elements associated with Social CRM. Take these five elements together and you have the basis for an enterprise-wide implementation of a feedback process based on customer insights gathered through active listening that be harnessed and used to drive your business. This is what Social CRM is all about.

Table 1 provides a starting point in understanding and investigating some of the best-in-class tools that can be used to create the quantitative framework for a Social CRM program. By linking social analytics (conversation analysis) and source identification (social graph analysis) together with commerce feedback (ratings and reviews) an end-to-end view of your commerce pipeline emerges. Taking the further step—through touchpoint analysis or an equivalent process-of tying sources, conversations, and commerce data to the internal business or organizational processes that drive the experiences that your customers and stakeholders talk about provides the business insights you need to evolve your business in alignment with your customers.

The Customer Point of View (POV)

Social analytics, even in their purely qualitative form, provide powerful insights into the personal views of your customers. Because the analytics platforms collect large amounts of data, you can get beyond the anecdotes of focus groups. Because the tools are real time (or near real time) and ongoing, you can also move beyond one-off surveys.

Looked at across the business or organization, social media extends far beyond marketing. Looking at the purchase funnel, shown in Figure 8.4, you can see that it's actually a better bet that social media has relatively little to do with marketing. Beyond creating a platform in which marketers-certain caveats respected—are welcome to participate along with everyone else in appropriate conversations, the origin of the conversations themselves has more to do with Operations, HR, and Customer Care-all of whom contribute in a tangible manner to what is talked about on the Social Web-and relatively less to do with marketing perse.

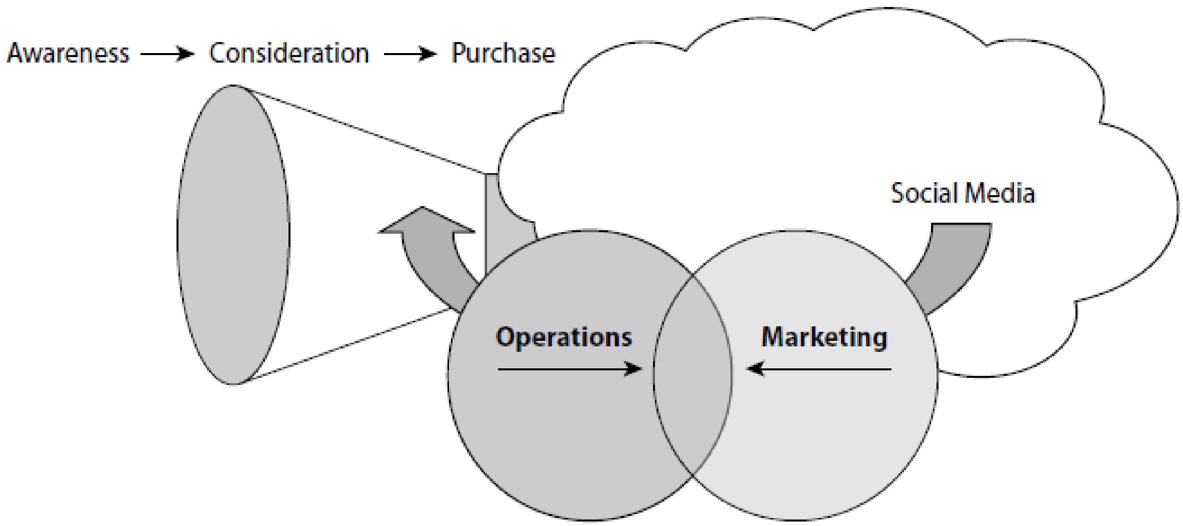

Fig.8.4. The Purchase Funnel and Operations

Social CRM picks up on this and formally recognizes that the conversations circulating on the Social Web *started* in, for example, Operations but then exerted themselves upon Marketing (by encouraging or dissuading sales). Again, this is a very different process than the more or less unidirectional flow of outbound messages associated with traditional campaigns.

This is why Social CRM is so powerful and so timely. Connecting customers into the business, and understanding their perspective and what attracts or repels them from your brand, product, or service is a path to long-term success. Social CRM combines the insights of Fred Reichheld's Net Promoter -itself a benchmark metric for long-term success-with quantitative tools and a flexible methodology for defining and evolving your business.

Map the Social Graph

Once you've got a handle on *what* is being said, the next step in implementing a Social CRM program is understanding *who* said it. By "who said it" I'm not referencing the personal details of a specific individual, though you may in some cases be able to discern this information from actual customer data or a similar source.

Rather, I'm referring to profile and social graph data, understanding who is talking about you by also understanding the other places where this same person publishes content and with whom it is shared. By seeing a profile in the context of that individual's social graph, you get a much more complete picture of individual motivation, influence, reach, and connectedness that allows you to prioritize your next steps in reaching out and responding (or not) to that specific individual.

"The Social Graph,"—defines the social links that exist between people within social networks. As well, the social graph includes pointers to the various other places where this individual publishes or otherwise participates. Social CRM and the more focused source identification tools navigate this social graph to create a map so that these relationships and linkage can be understood in a business context.

4. Integration of Listening. Customer Support and Social CRM. Activate Your Customers: Control vs. Leadership. Collaborative Processes

The active listening process is depicted in Figure 8.5. The integration with your business or organization occurs fi rst in the "routing" processes and then in "tracking." Of course, the act of responding itself is a business process: That, however, is really a function of having or not having a listening program and does not in itself imply a "social business" orientation. To be sure, listening is better than not listening, and listening combined with responding is a solid idea. But to really see the benefi t of a social business program within your organization, you've got to take a further step.

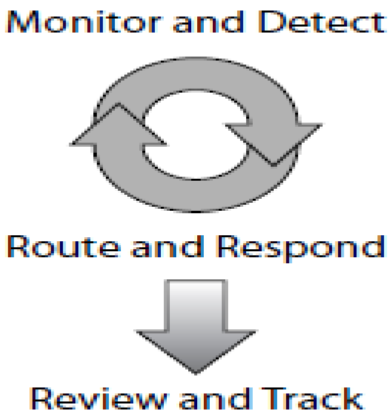

Fig.8.5. The Active Listening Process

That further step is reviewing what you discover, tracking the issues-the positives and negatives-and then using this information to inform, change, and innovate inside your organization. This information can be used to develop a response strategy that includes elements of both customer response and internal business response and adaptation.

Customer Support and Social CRM

Salesmanship begins when the customer says "no." Support begins when the customer says "yes." In a sort of basic truth about business, this view of customer support clarifi es one of the biggest opportunities a fi rm or organization will ever have: The opportunity to make those who were happy to buy from you even happier that they did. I point this out because in too many businesses, whether by accident or actual design, customer support feels to customers like an obligation whose cost is to be minimized.

A different orientation-viewing a call from a customer as an opportunity to create a moment of delight-is what defines firms like Zappos, though they are hardly alone. Beth Thomases-Kim, Director of Consumer Services at Nestlй, took exactly this view when she transformed a cost center-Customer Service-into a brand-building touchpoint. By viewing each call as an opportunity and measuring the outcomes of the calls, the customer service objectives morphed from optimizing call time (i.e., reducing call time) to creating happier customers who are more likely to make subsequent purchases as a result.

Beyond the support tools themselves, the essential practices that connect the conversations occurring within them have to do with tracking and quantifying the specific themes that recur. Issues in design, production, clarity of instructions, and a lot more can be identified and corrected by examining these themes in detail. Tracking service issues through associated tools like Jira is an easy way to identify candidate activities for process improvement, just as looking at delivery or inventory issues leads to improvement in supply chain processes.

Beyond directly addressing support and related issues, what else can you do with a support forum? Along with product or service-related findings, support forums can also yield valuable insights into the "hidden experts" that exist within your customer base.

This is precisely what Dell discovered as it acted on its own belief that the discussions in and around its prior support structure indicated the presence of brand advocates and subject matter experts within its customer base. By first turning controlled degrees of support over to its customers-and increasing this over time-while additionally making use of the reputation management tools that are available in best-of-class support platforms, Dell was able to not only reduce its support costs while improving the overall levels of customer satisfaction with its support services, Dell was also able to identify the customer experts who existed in the support networks.

When evaluating a support platform, pay particular attention to its reputation management and expert identification tools. Support platforms from Lithium Technologies (providing the support platform for Dell referenced in the prior section) are particularly good in this regard: Expert identification is the core strength of this particular platform. When considering the use of a branded support community, look for ways to identify and reward members who are providing above-average value.

Activate Your Customers: Control vs. Leadership

Consider customer/product interactions like those described in the case of Dell, and in particular the roles played by the customer versus the business or organization. The people creating and posting the content (for example, customers uploading pictures) have immediate control of the content and hence control over their side of the conversation.

It's "immediate" because it applies to this particular interaction: they get to defi ne what is being said right now and to infl uence others who are listening right now.

By comparison, brand teams, product managers, organization fundraisers, and similar have control only as far as the design of the experiences that led to the conversations.

In this sense, understanding the specifi cs that surround a conversation-who said it, what was said, and who (else) this conversation is likely to infl uence-provides the "proof points" for the business decisions and processes that gave rise to the conversations observed. These conversations close the loop-beyond the immediate sale-with regard to effi cacy of business programs intended to drive long-term sales and profi ts.

The net impact is that the position the product manager is in, for example, is more a leadership role (as in "leadership of the conversation") than a control role. This is worth noting, as again this transition from "control" to participant that is part of social media and hence social business, is evident. By shifting from control to leadership, the now-proper orientation toward the role of marketing and business design is clear. The end objective is, of course, to create the experiences that lead to the conversations you want and in turn drive the sales (or other conversions) that matter to you.

Collaborative Processes

With the audience connected to the business, and employees and customers connected to each other, knowledge begins to fl ow along pathways that prior to the widespread adoption of social technologies were not always seen as primary to the operation of a business. The high degree of connectivity and the ease with which consumers, business partners, and other stakeholders can talk about brands, products, and services is (overall) a benefi cial thing-long term, it leads to better products and services. But it also raises a challenge: What does the head of a marketing group-or for that matter a lone operations manager-do with the sometimes massive amounts of information and ideas that customers willingly offer?

Connecting the new fl ows of consumer-generated information with the units inside the business that might benefi t from it is, to put it simply, hard to do, for a number of reasons beginning with the required changes to the internal modes (regimented channels) of communication that exist in many businesses. Add to that the additional workload of managing customer input gathered through social technologies: It's that old that goes "My day was going great until the customers started showing up." It's hard to accept input when you're already fully loaded, yet (and especially in lean times) that's exactly where most businesses really want to operate: smaller numbers of employees, each of whom is fully tasked.

The successful adoption of social technologies in business is, therefore, as much about strategy and results as it is about process and efficiency: getting a smaller number of people to produce better products, faster, for example. Not coincidentally, it is by collaboration-internally- and by working in cross-functional teams and accepting customers as a key part of the business that a solution emerges. Collaboration has the potential to bring better solutions to the market faster, partly by the enhanced synergies and partly by the efficiency of avoided missteps resulting when customers are brought into the design process earlier. A big part of what is driving the adoption of social technologies across businesses, therefore, has to do first with knowledge extraction and collaboration, and second with putting it to use inside the organization.

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Digital Marketing and Internet (seminar)

Digital marketing

Digital marketing, as the term says, refers to marketing through digital technologies. With the increasing use and importance of technology globally, digital marketing has become more common and its importance and effectiveness in increasing rapidly with time. Digital marketing uses all the channels of electronics or electrical gadgets or the electronic media for marketing or promotion of products, services or brands. Digital marketing also helps organizations or institutions in the analysis of their marketing campaigns as they help to keep a record of all the campaigns thus helping to measure the effectiveness of each campaign. Digital marketing keeps a record of the number and duration of views of any particular ad, post, etc. and the effect of it on the sales, thus measuring the total impact of it. Some of the channels associated with digital marketing are SMS marketing, digital print ads, television marketing, radio advertising, etc.

Internet marketing, which includes email marketing, search engine optimization, social media marketing, pay per click, display ads on websites, gaming advertising, search engine marketing, call back or hold-on mobile ring tone, etc. These channels can be divided into two parts, i.e. internet and non-internet channels. Internet marketing is one of the most expensive channel of digital marketing.

Digital marketing has both advantages and disadvantages, and if handled in the right way, it can be a boon to the company else it can also be a bane. The major advantages of this are, it reaches a large number of customers in very less time and is also cheaper, thus it saves the cost of the company and also increases the number of people reached. Digital marketing also helps to keep a record of the consumer behavior which includes their preferences, responses to various products, services and brands, etc. so the company can make or plan it further marketing strategy based on these observation, they can also decide their future product offering by looking at the customer behavior. At the same time, digital marketing not only allows the customer to interact with the company but it allows them to interact with each other, because of which the customers now will not only know what the company wants them to now about their products or services but will also know what the other users or customers say about the company. This serves both as an advantage and disadvantage. The company has to keep its offering flawless and the best in order to maintain an image in the market as the news or the message spreads extremely fast with the help of these technologies, but at the same time if the existing customers like the offerings of the company, this serves as an advantage because it will attract more and more customers. Another major challenge faced because of digital marketing is the extremely tough competition because of its cheaper cost. As the cost is cheaper and it reaches more customers which serves as an advantage, it attracts many companies as well. Companies from every scale use the technique of digital marketing, and this makes it extremely competitive, which is a disadvantage for the companies as it becomes harder to attract the customers' attention, and also the customers miss out on a lot of relevant data.

All these advantages, disadvantages, and the general impact of digital marketing are applicable on all the channels of digital marketing. As stated above there are various channels of digital marketing, and it can be divided into two parts, i.e. internet marketing and non-internet marketing. A detailed explanation of internet marketing is given later in the article, but a brief explanation of internet marketing and various channels of non-internet digital marketing is given below for a better understanding of the concept.

Internet marketing:

Internet marketing is a subset of Digital marketing. Internet marketing or online marketing refers to marketing usingvarious channels on the internet. This includes, search engine optimization, pay per click, social media marketing, e-mail marketing, web banners, digital online advertising, online marketing platform, mobile marketing (apps), content marketing to some extent, etc.

Offline digital marketing:

Game advertising: Game advertising refers to advertising through video games or computer games. This is done through various banners, or billboards on the side of the roads in sports games. It might also be done by printing the brand name on certain product that exist as gaming status symbol, like cars, gins, clothing, etc.

Video marketing: It refers to making a video advertisement and circulating it through out. The circulation can be both online and offline. These video could also be on shown in the beginning of the movie, or other places.

Television: This refers to the commercials that are broadcasted on the television in between the programs and other shows that are only for the purpose of marketing and promotion.

Radio advertisement: This refers to the advertisements on the radio that come up to promote various products.

SMS/MMS marketing: Sms/mms marketing refers to the various promotional messages from different companies regarding the latest offers, trend, or the new products or services being offered.

Banners: This refers to the banners, billboards or hoarding on the roads with all the attractive offers, products, or brands.

Placement in movies or TV shows: Placement of many products is seen in movies or TV shows, where celebrities talk about the product to promote it or are shown using that product, or boards are shown on the roads in the movie or TV show.

Today, Internet marketing is one of the most fastest developing, growing and most energizing branch of marketing.

Internet-based communication tools have also led to major changes in the functioning of various economic sectors such as marketing.

Internet marketing is also referred to as Online marketing, E-marketing, web marketing. As the name suggests, it is the act of promoting goods and services through Internet. It is a type of marketing and publicizing which utilizes the Internet to convey promotional marketing messages to buyers. It is a subset of digital marketing. Internet marketing incorporates an extensive variety of marketing components than conventional business marketing because of the large variety of channels and marketing means accessible on the Internet. Just like any other promoting or advertising media, Internet advertising also involves both an advertiser or promoter and a publisher. The publisher incorporates advertisements in its online content, and the advertiser provides the advertisements that are supposed to be published or displayed on the publisher's content. Other people involved could be advertising agencies, ad server, and advertising affiliates. Advertising agencies basically help in generating and placing the advertisement copy. An ad server delivers the advertisements and keeps track of the statistics. Advertising affiliates are those partners that do independent promotional work for the advertiser.

Some of the main advantages that internet has are its empowering impact, elimination of geographic limitations or difficulties, targeting effectively, producing prompt results, cost effectiveness, reaching out to more people, quantifiable result, customization, building relationship, 24 hours/seven days accessibility. But usage of Internet in the field of marketing has its disadvantages also. For example, duplicating, an excessive amount of Ad clutter, unserious recognition, unconformity to the commodity, an excess of rivalry, harm by pessimistic feedback, too much dependence on technology, is not grasped by all individuals and absence of trust.

Internet marketing involves search engine marketing, email marketing, social media marketing, and many types of display advertising (including web banner advertising).

Search Engine Marketing:

Search Engine marketing is a part of internet marketing. It is a process which helps in promoting a website by increasing its visibility with the help of certain tools such as paid advertisements, Search engine optimization, and other search engine services that will help in increasing the search traffic to the website. Search Engine marketing is a broader term compared to Search Engine Optimization. SEO is generally considered as a part of SEM. SEO helps to achieve better organic search results, whereas SEM helps us to target the users with the help of paid advertising links in the search engine results page along with the organic search results so that the targeted users will visit the website.

Search marketers make use of a lot of paid search platforms. Out of that the most predominant paid search platform is Google AdWords, followed by Bing Ads and Yahoo. Beyond that, there are various other Pay Per click platforms and in addition to that the PPC advertising opportunities on some of the popular social media networks. Search engine marketing's most noteworthy quality is that it offers sponsors the chance to put their advertisements before customers who are ready to buy a particular product in that precise moment.

Social Media Marketing:

Social Media marketing is a part of internet marketing. It is a platform that can be used by anyone who has an internet connection. Social media marketing can be easily characterized as a term used to portray the act of increasing website traffic or brand awareness, using social media networking sites. Social Media marketing mainly focuses on designing a content that is very unique and helps in attracting the attention of the users. It should also persuade the viewers to share it with others. This type of marketing is driven by eWoM – electronic word of mouth, which means it results in earned media instead of paid media.

Social media marketing can help the organization to achieve various objectives. Some of the objectives could be increasing website activity or traffic, increasing the awareness about their brand among the people, creating a brand image and positive brand affiliation. It would also help in enhancing the communication and connection with the potential customers. There are a lot of Social media networking platforms, but each social media marketing sites would require different tools, techniques, or strategies of marketing. The following are some of the Social media networking platforms or sites that are used for marketing: Facebook, Instagram, Twitter, Google+, Pinterest, LinkedIn, YouTube and so on.

Email Marketing:

Email marketing is one of the most prevalent ways for organizations to reach and gain more customers. It is a part of Internet marketing. Email marketing is an approach that helps in reaching the customers directly with the help of electronic mail. It basically helps in advertising the goods and services to the customers directly. It is an approach that helps us to reach a lot of potential customers effectively at a low cost. It helps in directly conveying the business' message with the help of illustrations, content and links to the people who are not aware about the business or considered using the products or services, but they are educated and interested in the business' area of expertise. Moreover the effectiveness of Email marketing can be tracked easily. Various organizations additionally provide the customers or viewers with an "unsubscribe" choice if they want to stop receiving the mails. Moreover, the organizations can get direct feedback from the potential customers. This would help the organization in recognizing what the customers liked or disliked about the promotion and in turn create more effective future promotions or strategies. Some of the effective email marketing campaigns were done by PayPal, JetBlue, Amazon local, Charity: water, Tory Burch, Jabong, Mod cloth and so on.

Display Advertising:

Display advertising is also a part of internet marketing. It includes various forms such as banner advertisements, rich media, etc. It is different from text based advertisements. Display advertising is mainly aimed to build customer awareness around a brand, product, or service. This is very effective in case of visuals such as images, videos, etc. rather than content or text. HTML code is utilized to give instruction to a web server to direct the customer to the predefined website when the advertisement is clicked. Revenue for display advertising is generally earned on the basis of Cost Per Click.

The greatest advantage of display advertising is that the brand image is implanted in the viewer's brain, and results in more possibly of the viewer buying the product or service, which in turn increases the sales. Some of the best examples could be the ads published by automobile, E-commerce and online clothing companies such as Volkswagen, Audi, Amazon, and so on with the help of platforms such as facebook ads, twitter ads, google display ads, etc.

Social Networks in Marketing (Workshop)

The Workshop will be presented by the trainers.

Week 9. PR AND MARKETING

Role and Impact of PR (lecture)

Plan:

1. Role and Impact of Public Relations (PR) on Business
2. Role of PR in Crisis Management
3. An Analysis PR vs Advertising

1. Role and Impact of Public Relations (PR) on Business

PR is a major mass-promotional tool. It builds good relations with a company's various contacts by obtaining positive publicity, building up strong co-operate image, and handling & heading off unfavorable stories, events, and rumors. Public relations department may execute any or all of the following tasks:

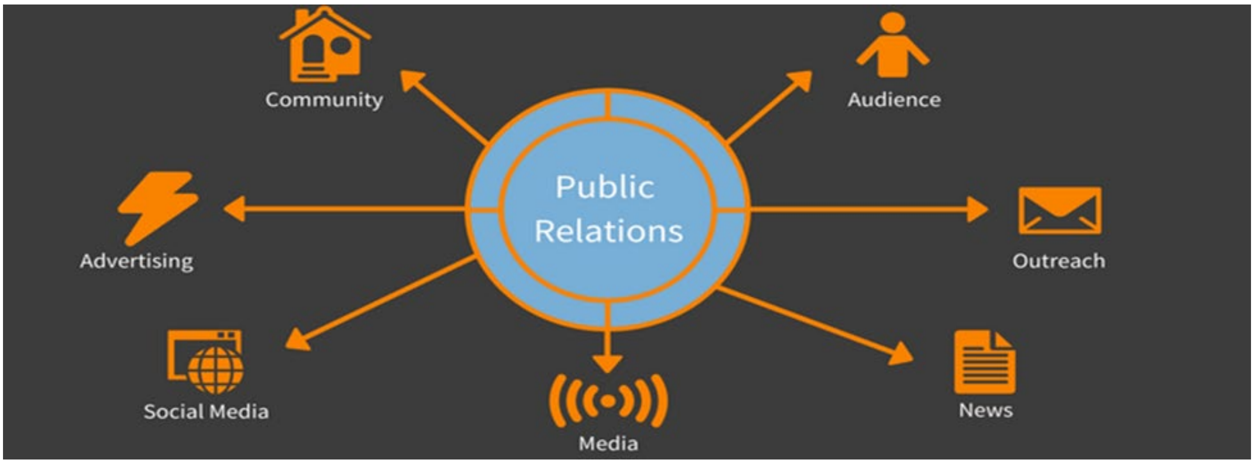

Fig.9.1. Public Relations

- **Press relations or press agency:**

It is all about creating and placing interesting information in the news media to draw attention to a person, goods, or services.

- **Product publicity:**

Product publicity is for publicizing the detailed products and publicity can be positive or negative both.

- **Public affairs:**

In public affairs, a company has to build and maintain local and national community relations.

- **Lobbying:**

It is all about to build & maintain cooperative relations with the government officials and legislators to persuade legislation and regulation.

- **Investor relations:**

To maintain excellent relationship with shareholders, investors and others in financial community who invest their money in your business.

- **Development:**

Public relation department has to create good relationships with NGOs, donors, or members of other non-profit organizations to gain financial and volunteer support.

Role and Impact of Public Relations

Public relations have a powerful impact on public awareness at a lower cost than advertising. There is a clear difference between publicity and advertising. "Publicity" is in a non-paid printed form and its impact can be negative and positive but "Advertising" is in a paid form and it has a positive impact for good or services.

The company does not compensate for the time or space in media. Rather than that it pays for a team to develop and circulate required information and to mange events. Public relations outcomes can sometimes be spectacular. The publisher Scholastic, Inc., used public relations to turn a simple new book introduction into a major international event, all on a small budget. Scholastic sponsored low-cost sleepovers, games, and costumes contests to whip up consumer passion for the fifth installment of its Harry Potter series.

Despite its potential strengths, PR is sometimes described as a marketing stepchild because of its often limited and scattered use. The public relation department is usually located at cooperate head offices and its staff is so busy to deal with various public, stockholders, other employees, legislators, city officials- that public relations plans to support product marketing objectives may be ignored. Many PR practitioners see their jobs as communicators. In contrast, marketing managers are much more interested in how advertising and PR affect brand building.

Public relations can be a powerful brand-building tool. The situation is changing, however. PR is playing an increasingly vital brand building role, although, public relations still captures only a small portion of the overall marketing budgets of most firm. So advertising and Public relations must work hand in hand to build and maintain brands of goods and services.

Role of Public Relations in Promotion of a Company

Not only must the company relate constructively to consumers, suppliers and dealers, but it must also relate to a large number of interested public. The business world of today is extremely competitive. Companies need to have an edge that makes them stand out from the crowd, something that makes them more appealing and interesting to both the public and the media.

The public is the buyers of the product and the media is responsible for selling it. A public is any group that has an actual or potential interest in or impact on a company's ability to achieve its objectives. Public relations involve a variety of programs designed to promote or protect a company's image or its individual products.

Advertisements:

The main goal of a public relations department is to enhance a company's reputation. Staff that work in public relations, or as it is commonly known, PR, are skilled publicists. They are able to present a company or individual to the world in the best light. The role of a public relations department can be seen as that of reputation protector.

Public relations provide a service for the company by helping to give the public and the media a better understanding of how the company works. Within a company, public relations can also come under the title of public information or customer relations. These departments assist customers if they have any problems with the company. They are usually the most helpful departments, as they exist to show the company at their best.

Definition:

According to Philip Kotler and Gary Armstrong, public relation means 'building good relations with the company's various publics by obtaining favorable publicity, building up a good corporate image, and handling or heading off unfavorable rumors, stories and events'.

Role of Public Relations:

Advertisements:

1. Marketing functions:

According to Thomas L. Harris, 'marketing public relation functions is the PR activities which is designed to support marketing objectives'. Some of the marketing objectives that may be aided by PR activities includes raising awareness, informing and educating, gaining understanding, building trust, giving consumers a reason to buy and motivating consumer acceptance.

2. Non-marketing PR functions:

As a non-marketing function, the primary responsibility of a PR executive is to maintain mutually beneficial relationship between the organization and the public, employees, community, investors, government, customers, and other interest groups. At the other end of the continuum, PR is primarily considered to have marketing communication functions. In this, all non-customer relationships are perceived as necessary only in a marketing context.

2. Role of PR in Crisis Management

The role of public relations was once defined by Edward L. Bernays, one of its pioneers, as "the engineering of consent." The characterization is accurate, but out of context it oversimplifies and has been used to attack public relations as cynical and manipulative. The real tasks of public relations in the business world may focus on corporate interests or those of marketing products or services; on image creation or defense against attack; on broad public relations or straight publicity.

In general, the strategic goal of public relations is to project a favorable public image, one of corporate good citizenship; but this cannot be accomplished with lights and mirrors in an age of investigative journalism, and the first responsibility of public relations is to persuade management that the reality must correspond with the desired image. Public relations is concerned with creating a favorable climate for marketing the client's products or services, including maintaining good relations with merchants and distributors as well as placing product publicity and disseminating information to trade and industrial groups. This calls for the preparation of technical articles addressed to technicians and engineers and of others translating technical information for lay readers. It further includes publicizing praiseworthy activities by company personnel. Financial public relations involve relations with a company's own stockholders (stockholder relations) as well as with the investment community.

To a large extent, the job of public relations is to optimize good news and to forestall bad news, but when disaster strikes, the public relations practitioner's task, in consultation with legal counsel, is to assess the situation and the damage, to assemble the facts, together with necessary background information, and to offer these to the news media, along with answers to their questions of fact. When a client is under attack, it is a public relations responsibility to organize the client's response-usually involving several complicated issues-to be both lucid and persuasive.

A government relation is often included in public relations under the general designation of public affairs and encompasses lobbying. Industrial relations (i.e., lab our-management relations), employee relations, and customer relations sometimes are accounted part of public relations. Community relations is important wherever a client has an office or plant. Modern corporate executives often do not excel at public speaking or writing in non-business language, and a duty of public relations is to translate executives' knowledge into speeches or articles intelligible to non-specialists. In fact, the prime responsibility of public relations can be seen as interpreting the client to the public and vice versa.

Public relations, in contrast to advertising and sales promotion, generally involve less commercialized modes of communication. Its primary purpose is to disseminate information and opinion to groups and individuals who have an actual or potential impact on a company's ability to achieve its objectives. In addition, public relations specialists are responsible for monitoring these individuals and groups and for maintaining good relationships with them. One of their key activities is to work with news and information media to ensure appropriate coverage of the company's activities and products. Public relations specialists create publicity by arranging press conferences, contests, meetings, and other events that will draw attention to a company's products or services.

There have been countless public relations crises in the past and there are five steps that should be executed in order to properly manage a crisis. First, the corporation in crisis should be prompt, addressing the public immediately following the discovery of the crisis. Second, the corporation in question should maintain honesty because the public is more willing to forgive an honest mistake than a calculated lie. Third, it is important to be informative because the media as well as the public will create their own rumors if no information is given to them by the corporation in crisis. Rumors can cause significantly more damage to the corporation than the truth. Next, it is important to be concerned and show the public you care because people will be more forgiving if it is clear that the corporation cares about the victims of the crisis. Finally, maintain two-way relationships. This is important because the corporation can learn a lot about the status of public opinion by listening. These five steps are necessary in order to manage any crisis public relations.

With that having been said, each crisis situation is unique and, therefore, requires a tailored response. There are six types of responses and they range on a continuum from defensive to accommodative. First, corporations can attack the accuser attempting to eliminate the attacker's credibility. Second, corporations can use denial claiming that no crisis exists. The third response is justification where the corporation claims no serious damage was done or that the victim was at fault. Fourth, the corporation can use ingratiation to appease the public, such as giving away coupons. Next, corporations can use corrective action to right their wrongs. Finally, the corporation can give a full apology asking for forgiveness for their mistake. All six responses have been used in the past with varying results. If chosen properly, one of the six responses can help mitigate damage.

3. An Analysis PR vs Advertising

PR agencies must protect themselves as more than media relations experts. They must act like consultants and not as mere order-takers.

PR arrives as a business opportunity

Today, clients have realized the value of public relations as a means of communication. They know that while advertising can often neither be replaced nor substituted, it can certainly be reinforced and given credibility by public relations. They are also realizing that there is more to public relations than the huge press conferences where the media was wined, dined and gifted. They are realizing that there are columns other than the product launch column that they were accustomed to earlier.

Figure 9.2. Public relations tools

Some enterprising clients use PR agencies to subtly increase their market value in the employment rat race. Others are using PR agencies to influence stock prices. Technology companies are using public relations to tell prospective employees that they are an "employer of choice."

Sadly enough, while this is a tremendous opportunity for public relations as a business, it seems to at least that the discipline does not get the importance it receives. We should clarify that public relations will get its place in India at least, when PR activities find a genuine provision in the marketing budget and not the leftovers of the advertising budget!

Clients need to understand that provisions for a PR budget extend beyond the (often miserly) monthly retainer that clients pay and should include events and other activities that build mileage and media visibility. Clients think they are smart when they start conversations with PR agencies with depressing clichés - "The good news is that we don't have money." And PR agencies smile, secure in the knowledge that at least there is a retainer. And this is the sad part to this whole unequal exchange. Public relations can and will deliver, at times better than advertising with much lower costs of the cost.

Clients have fun

Clients are the source of all benefits to agencies. They give assignments and must be served. And yet clients, as we know, come in all sizes, shapes and colours. And often exhibit their true colours in the manner in which they treat PR agencies. As PR, similar to advertising has low barriers of entry - one man or one woman can start a PR agency. While this is welcome from a spirit of enterprise, it basically means that the costs of running a one-person agency are lower and the fees charged too are abysmally low. So clients get away with shoestring retainers. Nor is that all. Clients use their traditional strengths and the traditional disunity among PR agencies.

PR: An Instance

A client was hardly doing anything that was newsworthy. The PR firm moved heaven and earth, pitching possible stories across different publications at different centres and actually got significant coverage. The client stopped working with them, which was fair. What was not fair was that he did not pay them the retainer for the last two months and soon released an ad calling for a PR agency. A year later, some other PR agency will have the same problem that we had. And it is precisely clients like these from whom the smaller PR agencies need protection. Advertising has the Advertising Agencies Association of India, a body that circulates details of client outstanding to its members and warns them against unscrupulous clients. And a body like this for public relations will make the industry stronger.

Is it only restricted to getting Coverages?

A bone of contention between the client and the agency often is the coverage or lack of it. Agencies believe they are doing a great job and they are often very right. Privately, the client believes it as well, but is shrewd enough to recognize that accepting this would mean an increase of PR retainer fees. So the smart clients increase the strength of their whining closer to the time of the renewal.

The PR agency needs to find a means of evaluation that, even if not universal, will at least find general acceptance. And while a few large agencies probably are using their own proprietary models, broad basing their appeal and use must help the industry as well. Small PR agencies tend to be wary of the large ones and understandably so. But in their own interest, it makes sense for them to insist on clients being `media trained' as larger agencies insist. Even if they are unable to provide this, they must ensure their clients go through this even if it is outsourced. It will only make things easier for them in the long run. Like this former client - a CEO of a technology company who was a complete wimp. He was put in front of media at least 10 times for interviews and ended up with one lousy write-up. Consecutively the account/ client was lost but the problem was elsewhere. Obviously, talking interestingly to media was not part of his key result area while coverage was part of the PR agency.

The PR classes:

A growing industry without sufficient manpower basically means that no one has the time to train. Some mentoring happens, but formalized training? Agencies poach merrily from the competition and people leave without fulfilling their obligations and notice periods. Some of them are suddenly struck with prolonged bouts of migraine, which seems to magically disappear in their new environments. And it is in areas like these that the industry suffers. PR agency heads must talk to each other more often and trust each other more.

Paid Space or Free Coverage

➢ Advertising:

The company pays for ad space. You know exactly when that ad will air or be published Public Relations:

Your job is to get free publicity for the company. From news conferences to press releases, you're focused on getting free media exposure for the company and its products/services.

1. Creative Control Vs. No Control

➢ Advertising:

Since you're paying for the space, you have creative control on what goes into that ad.

➢ Public Relations:

You have no control over how the media presents your information, if they decide to use your info at all. They're not obligated to cover your event or publish your press release just because you sent something to them.

2. Shelf Life

➢ Advertising:

Since you pay for the space, you can run your ads over and over for as long as your budget allows. An ad generally has a longer shelf life than one press release.

➢ Public Relations:

You only submit a press release about a new product once. You only submit a press release about a news conference once. The PR exposure you receive is only circulated once. An editor won't publish your same press release three or four times in their magazine.

3. Wise Consumers

➢ Advertising:

Consumers know when they're reading an Advertisement they're trying to be sold a product or service.

"The consumer understands that we have paid to present our selling message to him or her, and unfortunately, the consumer often views our selling message very guardedly," Paul Flowers, president of Dallas-based Flowers & Partners, Inc., said. "After all, they know we are trying to sell them."

➢ Public Relations:

When someone reads a third-party article written about your product or views coverage of your event on TV, they're seeing something you didn't pay for with ad dollars and view it differently than they do paid advertising.

"Where we can generate some sort of third-party 'endorsement' by independent media sources, we can create great credibility for our clients' products or services," Flowers said.

4. Creativity or a Nose for News

➢ Advertising:

In advertising, you get to exercise your creativity in creating new ad campaigns and materials.

➢ Public Relations:

In public relations, you have to have a nose for news and be able to generate buzz through that news. You exercise your creativity, to an extent, in the way you search for new news to release to the media.

5. In-House or Out on the Town

➢ Advertising:

If you're working at an ad agency, your main contacts are your co-workers and the agency's clients. If you buy and plan ad space on behalf of the client like Media Director Barry Lowenthal does, then you'll also interact with media sales people.

➢ Public Relations:

You interact with the media and develop a relationship with them. Your contact is not limited to in-house communications. You're in constant touch with your contacts at the print publications and broadcast media.

6. Target Audience or Hooked Editor

➢ Advertising:

You're looking for your target audience and advertising accordingly. You wouldn't advertise a women's TV network in a male-oriented sports magazine.

➢ Public Relations:

You must have an angle and hook editors to get them to use info for an article, to run a press release or to cover your event.

7. Limited or Unlimited Contact

➢ Advertising:

Some industry pros such as Account Executive Trey Sullivan have contact with the clients. Others like copywriters or graphic designers in the agency may not meet with the client at all.

➢ Public Relations:

In public relations, you are very visible to the media. PR pros aren't always called on for the good news. If there was an accident at your company, you may have to give a statement or on-camera interview to journalists. You may represent your company as a spokesperson at an event. Or you may work within community relations to show your company is actively involved in good work and is committed to the city and its citizens.

8. Special Events

- Advertising:

If your company sponsors an event, you wouldn't want to take out an ad giving yourself a pat on the back for being such a great company. This is where your PR department steps in.

- Public Relations:

If you're sponsoring an event, you can send out a press release and the media might pick it up. They may publish the information or cover the event.

9. Writing Style

- Advertising:

Buy this product! Act now! Call today! These are all things you can say in an advertisement. You want to use those buzz words to motivate people to buy your product.

- Public Relations:

You're strictly writing in a no-nonsense news format. Any blatant commercial messages in your communications are disregarded by the media.

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Role and Impact of Public Relations (seminar)

Objectives of Public Relations

Like other aspects of marketing promotion, public relations are used to address several broad objectives including:

- **Building Product Awareness** – When introducing a new product or re-launching an existing product, marketers can use a PR element that generates consumer attention and awareness through media placements and special events.

- **Creating Interest** – Whether a PR placement is a short product article or is included with other products in "round up" article, stories in the media can help entice a targeted audience to try the product. For example, around the holiday season, a special holiday food may be promoted with PR through promotional releases sent to the food media or through special events that sample the product.
- **Providing Information** – PR can be used to provide customers with more in depth information about products and services. Through articles, collateral materials, newsletters and websites, PR delivers information to customers that can help them gain understanding of the product.
- **Stimulating Demand** – A positive article in a newspaper, on a TV news show or mentioned on the Internet, often results in a discernable increase in product sales.
- **Reinforcing the Brand** – In many companies the public relations function is also involved with brand reinforcement by maintaining positive relationships with key audiences, and thereby aiding in building a strong image. Today it is ever more important for companies and brands to build a good image. A strong image helps the company build its business and it can help the company in times of crises as well.

Impact of Public Relations on public corporations

Public relations offers several advantages not found with other promotional options. First, PR is often considered a highly credible form of promotion. One of PR's key points of power rests with helping to establish credibility for a product, company or person (e.g., CEO) in the minds of targeted customer groups by capitalizing on the influence of a third-party — the media. Audiences view many media outlets as independent-party sources that are unbiased in their coverage, meaning that the decision to include the name of the company and the views expressed about the company is not based on payment (i.e., advertisement) but on the media outlet's judgment of what is important. For example, a positive story about a new product in the business section of a local newspaper may have greater impact on readers than a full-page advertisement for the product since readers perceive the news media as presenting an impartial perspective of the product.

Second, a well-structured PR campaign can result in the target market being exposed to more detailed information than they receive with other forms of promotion. That is, media sources often provide more space and time for explanation of a product.

Third, depending on the media outlet, a story mentioning a company may be picked up by a large number of additional media, thus, spreading a single story to many locations.

Finally, in many cases public relations objectives can be achieved at very low cost when compared to other promotional efforts. This is not to suggest public relations is not costly, it may be, especially when a marketer hires PR professionals to handle the work. But when compared to the direct cost of other promotions, in particular advertising, the return on promotional expense can be quite high.

Market Landscape and Public Relations

Marketers have at their disposal several tools for carrying out public relations.

The key tools available for PR include:

1. Media Relations.
2. Media Tours.
3. Newsletters.
4. Special Events.
5. Speaking Engagements.
6. Sponsorships.
7. Employee Relations.
8. Community Relations and Philanthropy.

Before choosing among the various tools marketers should begin by identifying their targeted audiences (e.g., target markets) and key messages they wish to send. These should align with the messages and audiences identified for the product being promoted or corporate goals for non-specific product promotions, such as corporate image promotions.

The key messages are used in the development of public relations materials and supporting programs described below. The purpose of key messages is to provide a consistent point of view over time and across numerous PR methods that reinforce product positioning (i.e., customer's perceptions) and reach the desired target audience.

Company image sets the stage for how receptive a target audience is for your messages. For service businesses, your image takes on an even greater importance because you are essentially the company's raw material, machinery, inventory and product all rolled into one. Therefore employees comprise company's image. As an example, a wardrobe consultant that wears outdated clothes that don't fit to a potential client meeting won't create the image that attracts and retains clients. Some people confuse reputation with company image. Your reputation is only one component of an overall image. For example, you may have a reputation for always delivering quality products on time, but your company image also includes the quality of your presentation materials, your advertising, and pricing.

Major Public Relations tools (Workshop)

The Workshop will be presented by the trainers.

Week 10. ADVERTISING IN MARKETING

What is advertising, types of media (lecture)

Plan:

1. Meaning of Advertising Media.
2. Types of Advertising Media.

1. Meaning of Advertising Media

Definition: Advertising is a means of communication with the users of a product or service. Advertisements are messages paid for by those who send them and are intended to inform or influence people who receive them.

Description: Advertising is always present, though people may not be aware of it. In today's world, advertising uses every possible media to get its message through. It does this via television, print (newspapers, magazines, journals etc), radio, press, internet, direct selling, hoardings, mailers, contests, sponsorships, posters, clothes, events, colors, sounds, visuals and even people (endorsements).

The advertising industry is made of companies that advertise, agencies that create the advertisements, media that carries the ads, and a host of people like copy editors, visualizers, brand managers, researchers, creative heads and designers who take it the last mile to the customer or receiver.

A company that needs to advertise itself and/or its products hires an advertising agency. The company briefs the agency on the brand, its imagery, the ideals and values behind it, the target segments and so on. The agencies convert the ideas and concepts to create the visuals, text, layouts and themes to communicate with the user. After approval from the client, the ads go on air, as per the bookings done by the agency's media buying unit.

Advertising media are the devices by which and through which the advertising messages are transmitted by the advertisers to the prospective and existing customers. The message regarding the product or service is passed on to the consumers or persons concerned through the media.

In advertising, media are the facilitating functions and constitute an industry. Media are the carriers of message of an advertiser whose aim is to reach to the public so that he and his product or service may come to the knowledge of the public and in turn public may turn to him and his product or service.

2. Types of Advertising Media

There are large varieties or types of advertising media or channels for advertising. And for each channel there are sub-varieties, e.g., newspaper is a channel or medium but there are varieties of newspapers printed in different languages in the countries. It is, thus, a difficult task to choose the media because of alternatives. *The different types or classes of advertising media together with their relative merits and demerits are discussed below:*

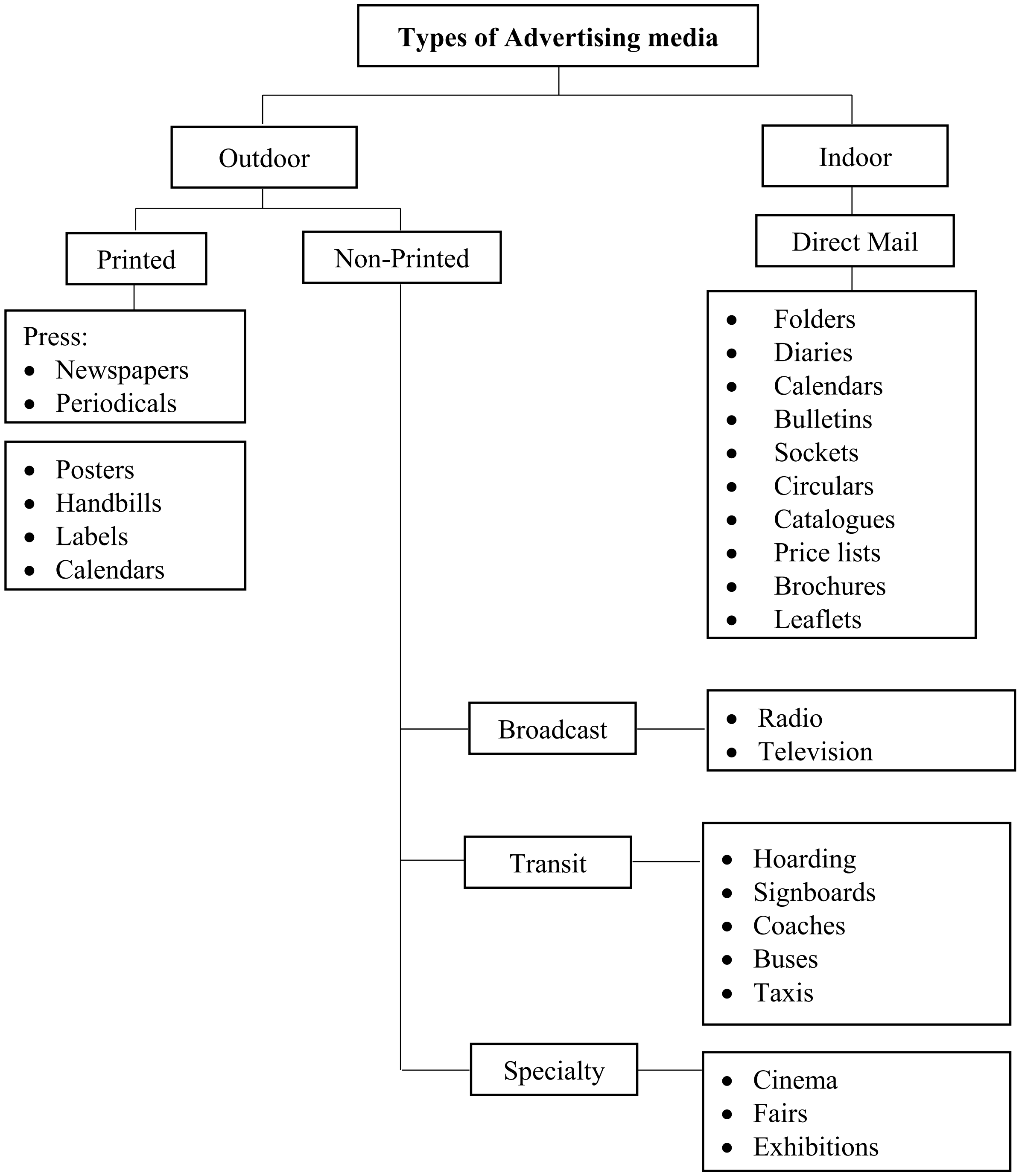

Fig.10.1. Types of Advertising Media

1. Outdoor Advertising (Printed Media):

(A) Press:

It is one of the most important and popular media. The word Press is a collective word meaning different types of newspapers and periodicals and particularly the newspapers. Daily newspapers and weeklies have largest circulations and so are the best media for advertising for consumer goods. But all newspapers are not of equal standard or value.

The following factors are taken into consideration before making selections:

(a) The circulation;

(b) The nature of readers who read it;

(c) The nature of advertisements which are generally published;

(d) The get-up, quality of paper and printing, the number of colors used, etc. and

(e) The rates of publication of advertisements.

The merits of newspapers as media are great because of the following reasons:

(a) Through newspapers the advertisements can reach the largest number of people.

(b) The cost of advertisement is comparatively cheap.

(c) People speaking different languages can be specifically approached through different language newspapers,

(d) The advertising copy can be regularly changed for new excitements,

(e) Daily repetitions (if, of course, the budget permits) create a lasting effect.

But there are demerits too:

(a) Newspapers have purely temporary value. The newspaper of today has no value tomorrow.

(b) People very often read newspapers casually and leisurely and so many advertisements, unless they are very attractive, miss the attention,

(c) There is no effect unless there are repetitions which is a costly affair,

(d) The greatest drawback is that newspapers have no appeal for the illiterate people.

The periodicals or magazines or journals, are also very useful media. There are different types of periodicals according to their periodicities, e.g., quarterly, bi-monthly, monthly, fortnightly, weekly, etc. Some periodicity suit some product. Again periodicals are often of special types, e.g., science journals, sports journals, film journals, political journals, literary journals, etc.

They have different classes of readers for them and specific journals are selected for specific products. The advertisement of a specific medicine shall have best effect in medical journals. Some big firms publish their own magazines which are called "house magazines".

The importance of periodicals is established because of the following reasons:

(a) Good periodicals are very often preserved,

(b) Periodicals are read for a number of days,

(c) Periodicals have specialization,

(d) Periodicals are published in more varieties of languages,

(e) Same periodicals have world-wide circulation, e.g., 'Time'.

But there are limitations too:

(a) Periodicals are meant for educated people.

(b) The circulations are not very high generally.

(B) Posters, Handbills, etc.:

Posters are printed and stuck on walls or specified frames like Kiosks. Kiosks are boxes fixed on lamp posts. Posters can be made very colorful and bright as well as of very big size.

Handbills are printed in small sizes and are distributed directly on the streets or at the gates of some institutions or play houses or other establishments. Posters are very much used at railway stations, street crossing, inside cinema halls and restaurants and such other public places.

Importance and limitations:

(a) Posters have some lasting value,

(b) They are attractive because pictures and colors are used and now-a-days shining fluorescent ink creates further attractions,

(c) But handbills have purely temporary value,

(d) It is very difficult to reach very large number of persons through handbills,

(e) Posters can be seen by large number of people.

(f) But large number of posters have to be stuck,

(g) Printing of pesters is a costly affair.

(C) Labels and Calendars, etc.:

Printing of labels on matchboxes, stamping of some messages on envelops together with the franking, i.e., use of mechanical postage stamps, and calendars are very common media now-a-days. These are good for their novelties but cannot have very wide circulation.

2. Outdoor Advertising (Non-Printed Media):

(D) Cinema:

Cinema has become a very popular and useful medium of advertising in recent times. Cinema can be used in two ways:

(i) Exhibition of slides during the interval time or prior to the show.

(ii) Short films or cartoons can be prepared with a story, consisting of generally one reel.

The importance and limitations are as follows:

(a) This is a very effective medium because it has a double effect - audiovisual, i.e., hearing and seeing in case of film reels,

(b) The Government prepares documentary films for mass publicity and education,

(c) It is effective on illiterate people also.

But:

(i) It has limited appeal and only to cinema- goers only,

(ii) People very often lock at such publicity materials casually as the mind remains occupied with the main film.

(iii) Some people do not like to waste time and avoid the advertisements as they have come to cinema purely for entertainment.

(E) Exhibitions and Fairs:

Holding of exhibitions and fairs are very powerful and well-organized media for publicity in recent times. Exhibitions are purely commercial or educative while a fair is a wider term which means exhibition of products and in addition there is scope for sales and also for other entertainments.

Exhibitions and fairs are generally organised by some trade associations or specialised institutes or by the Government itself, or by Government agencies like export promotion councils.

Occasionally international or world fairs are organised either by a country inviting others or by international organisations. Special exhibitions may be held in connection with sore special conference.

The importance and limitations of such media are:

(a) Exhibitions and fairs have direct appeal to the potential buyers as the products are exhibited. Even heavy machines are exhibited at special fairs,

(b) The buyers and sellers can meet and hold discussions in the conferences held along with the exhibition and fairs. This is more common at international exhibitions and fairs.

But:

(i) Holding of exhibitions and fairs need tremendous organisational work,

(ii) Huge capital is necessary to organise large- size arid purposeful exhibitions and fairs though there is scope of income from letting out stalls,

(c) The success depends on proper timing and proper selection of site.

(F) Hoardings:

Advertisement is commonly done by making structures to hold some big display boards made of durable materials on which paintings are made for advertising with pictures, slogans, cartoons etc. Some good sites are selected on broad streets or crossings or by the side of railway lines. Various kinds of colourful lights like neon-signs or fluorescent lights, either fixed or moving, are used to draw attention during nights.

The importance and limitations:

These are very effective in local areas and often enhance the goodwill of the firms. But their scope is very limited.

(G) Radio and Television:

Perhaps the most popular media for indoor publicity are the radio and the television. There are world-wide network of radio and television systems through which publicity is carried out. The Government utilises these mass media for publicity and education. Generally, radio and television are directly controlled by the Government.

The importance and limitations are:

(a) These have perhaps the greatest individual approach value.

(b) These media, particularly the radio, can be highly effective even in remote areas as transistors are used which do not need any electricity,

(c) People can hear the radio while doing other work. This is more applicable to workers in factories and the housewives,

(d) These are effective on the illiterate buyers too.

But:

(i) Such publicity is comparatively expensive,

(ii) T.V. is till now too costly for ordinary people in countries like India,

(iii) The effectiveness largely depends on the development of the systems by the Government.

(H) Point of sale publicity:

Generally, the publicity is carried out by different media away from the selling points. But there are some points of sale publicity methods, e.g., Window display. Manufacturers, wholesalers and most retailers organise showrooms with delightful and colourful decorations with showcases where products are exhibited (window display). Signboards with colourful lights, neon-signs, etc. attract people in the night time.

The importance and limitations are:

(a) Once people are attracted by window display there will be immediate effect.

(b) There are endless novelties in the art of window display using mannequins (full human size dolls) and even living show-girls (as found in Western countries). But window display has purely local appeal and is effective only when a showroom has good frontage.

3. Indoor Advertising:

(I) Direct mailing:

Catalogues, price-lists, bulletins, folders, circulars, etc., are sent to ‘customers or potential customers directly by post at some regular intervals. Manufacturers and wholesalers and even big retailers like departmental stores send such materials and in case of manufacturers the materials can be sent either to actual consumers or to dealers or to wholesalers and by big wholesalers to retailers.

A mailing list has to be carefully prepared and regularly updated with necessary changes. Sometimes some ‘special offers’ with special discounts or gifts are offered by way of sales promotion if orders are placed within a specified date.

A mailing list is prepared by consulting different trade directories, telephone directory, civil list (i.e., the list of Government servants), etc. Direct mailing is very useful for Mail Order business.

The importance of direct mailing can be realized because of the following advantages:

(a) There is a direct approach to the selected buyers with more effective and direct appeal.

(b) It is less costly than press advertisements.

(c) The readers can read materials leisurely.

(d) It supplements general advertisement.

(e) The products can be described more clearly and adequately and with pictures,

(f) It develops a personal touch with the potential buyers which has a great psychological impact.

But direct mailing has the following limitations:

(a) By this method only a limited number of buyers can be approached.

(b) It is not possible to use direct mailing for all kinds of products.

(c) It is difficult to prepare the mailing list correctly and exhaustively and to keep it updated with necessary changes caused by death, retirement, removal etc.

(d) The method is not really economic and often leads to heavy expenses.

Factor Considerations in Selecting the Best Advertising Media:

Perhaps it is more important to select the media or channels through which the message will be communicated. Media selection is a specialist's job and advertising agencies are experts in these directions.

The choice of suitable media depends on three basic factors as listed below:

1. The nature of product or services:

Whether the products relate to the consumers or producers or industries, and whether the services are meant for transmitting a social message.

2. The nature of potential buyers:

This requires an analysis and understanding of the likes, dislikes, preferences, habits, attitudes and socio-economic status of the buyers.

3. The budget and cost factors:

This requires the consideration of the cost of the media in relation to: the amount of funds available for advertising; and the circulation of the media. While a large manufacturer can allocate large funds for advertising in the T.V., a medium or small firm having limited funds for advertising has to choose newspapers.

Further, the advertiser should also try to ascertain a relationship between the cost of the medium selected and the circulation thereof in order to gauge the 'cost per contact'.

In addition to the above factors, the advertiser should keep in mind the criteria of:

(i) The number of persons influenced,

(ii) The class of persons influenced,

(iii) The conditions under which the persons are influenced,

(iv) The nature of competition, and

(v) The type of advertising message.

According to Maheswari, Tripathy, and Verma, the central idea of advertisement must not be lost sight of while making a choice of a medium. They suggest consideration of the factors of pride, comfort, beauty, health, economy, etc., in the selection of particular medium.

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Setting of advertising objectives (seminar)

Advertising objectives are necessary not only for a business plan, but also for the day-to-day operations of a small business. You need to set goals and having advertising objectives is a great way to create and monitor goal progress. By taking these steps you can ensure that the right amount of money is being spent on advertising and that you are choosing the right advertising avenues for your product or service.

1. Be realistic in your expectations. Advertising objectives by nature can be a bit nebulous. You know you need to reach many people with your ads, but realism needs to play a key role when you are developing your objectives. Start small and then create larger objectives as you become more successful.

2. Understand your market. Knowing how and where to reach your market is necessary when developing advertising objectives. If your audience is mainly online and you spend thousands of dollars advertising on television, you will be wasting your money. Know who your audience is, what they want and where to find them.

3. Plan what you want to accomplish first. Before setting an advertising goal, decide how many new customers you want to reach or how many sales you hope to get for your advertising dollar. While this may seem backwards, visualizing your end result helps you develop the objective for reaching that result.

4. Use your budget to help make decisions. If you have "X" amount of dollars to spend on your entire advertising campaign for the year, you will need to decide where and how that money will be spent. Again, it helps to know where you need to target your customers. The safest investment is sinking your advertising money into objectives that you know you can achieve. Your budget can help you decide how to tailor your advertising objectives.

5. Test your objectives before fully committing. Running small test campaigns can be the final deciding factor on whether or not your advertising objectives are feasible. Assign a small amount of money to run a test campaign online, in print or on the radio and gauge the initial response. Use this data to help you finalize your objectives. Below in Figure 10.2 is presented Setting Advertising Objectives.

Fig.10.2. Setting Advertising Objectives

To achieve one or more of these objectives, advertising is used to send a message containing information about some element of the marketer's offerings. For example:

Message About Product

Details about the product play a prominent role in advertising for new and existing products. In fact, a very large percentage of product-oriented advertising includes some mention of features and benefits offered by the marketer's product. Advertising is also used to inform customers of changes taking place in existing products. For instance, if a beverage company purchases a brand from another company resulting in a brand name change, an advertising message may stress "*New Name but Same Great Taste*."

Message About Price

Companies that regularly engage in price adjustments, such as running short term sales, can use advertising to let the market know of price reductions. Alternatively, advertising can be used to encourage customers to purchase now before a scheduled price increase takes place.

Message About Other Promotions

Advertising often works hand-in-hand with other promotional mix items. For instance, special sales promotions, such as contests, may be announced within an advertisement. Also, advertising can help salespeople gain access to new accounts if the advertising precedes the salesperson's attempt to gain an appointment with a prospective buyer. This may be especially effective for a company entering a new market, where advertising may help reduce the uncertainty a buyer may have with setting up an appointment with a salesperson from a new company.

Message About Distribution

Within distribution channels, advertising can help expand channel options for a marketer by making distributors aware of the marketer's offerings. Also, advertising can be used to let customers know locations where a product can be purchased.

Evaluation of advertising effectiveness (Workshop)

The Workshop will be presented by the trainers.

Week 11. PROJECT MANAGEMENT IN MARKETING

Introduction to Project Management (lecture)

Plan:

1. Project Management Methodology.
2. Progress Control.

1. Project Management Methodology

A project is a temporary and one-time exercise which varies in duration. It is undertaken to address a specific need in an organization, which may be to create a product or service or to change a business process. This is in direct contrast to how an organization generally works on a permanent basis to produce their goods or services. For example, the work of an organization may be to manufacture trucks on a continual basis, therefore the work is considered functional as the organization creates the same products or services over-and-over again and people hold their roles on a semi permanent basis.

What is Project Management?

A project is generally initiated by a perceived need in an organization. Being a one off undertaking, it will have a start and an end, constraints of budgets, time and resources and involves a purpose built team. Project teams are made up of many different team members, for example, end users/customers (of a product or service), representatives from Information Technology (IT), a project leader, business analysts, trainers, the project sponsor and other stakeholders.

Project management is the discipline of managing all the different resources and aspects of the project in such a way that the resources will deliver all the output that is required to complete the project within the defined scope, time, and cost constraints. These are agreed upon in the project initiation stage and by the time the project begins all stakeholders and team members will have a clear understanding and acceptance of the process, methodology and expected outcomes. A good project manager utilizes a formal process that can be audited and used as a blue print for the project, and this is achieved by employing a project management methodology.

Generally, projects are split into three phases Initiation, Implementation and Closure. Each phase then has multiple checkpoints that must be met before the next phase begins.

The degree to which a project is managed will depend on the size of the project. For a complex project in a large organization that involves a number of people, resources, time and money, a more structured approach is needed, and there will be more steps built into each stage of the project to ensure that the project delivers the anticipated end result. For a simple project in a small organization, agreed milestones, a few checklists and someone to co-ordinate the project may be all that is required. In Figure 11.1 is presented the scheme of Project management process.

Fig.11.1. The scheme of Project management process

Initiating a Project

All projects start with an idea for a product, service, new capability or other desired outcome. The idea is communicated to the project sponsors (the people who will fund the project) using what is called either a mandate or project charter. The mandate is a document structured in a way that lays out a clear method for proposing a project and should result in a business case for the project. Once the business case has been approved a more detailed document is prepared that explains the project and it is known as the 'The Project Definition Report' (PD). The PD is not only used to provide detailed information on the project, but is the report on which an assessment is made as to whether the project should proceed or not. Some of the key areas it covers is the scope of the project, results of any feasibility studies, and what it is intended to deliver. As well this document will identify the key people involved, resources required, costs and expected duration as well as benefits to the business. A project usually has a goal (the big picture) and this has to then be broken down into objectives you can use to measure whether you have achieved your aims.

From this list you must then identify what is known as 'Key Success Criteria', and these are the objectives that are 'key' to the success or failure of the project - even if other objectives are met. These obviously vary from project to project. Once the project has been given the go ahead, then a contract document is drawn up and the project sponsor uses this to give formal agreement to funding the project and for the project to begin. The initiation phase is then considered to be completed. In Figure 11.1 is presented the scheme of Project initiation.

Fig.11.2. The scheme of Project initiation

Implementing a Project

The implementation phase is about tracking and managing the project. The first thing that happens when the project begins is to use the Project Definition Report to create a project plan which defines how to perform what is detailed on the PD report. The PD is more of a summary of the project, so a detailed project plan must be created to fill in the fine detail of how the project will be run. The project plan is the central document that is used to manage the project for its duration so getting agreement and acceptance from all of the team on aspects such as the project milestones, phases and tasks, as well as who is responsible for each task, associated timelines and what deadlines are to be met.

Some of the stages in implementing a project are quality control, progress control, change control and risk management. The first aspect we will discuss is **risk management**, as once you have planned the project it is important to assess any factors that could have an impact upon it. 'Risk' in this case is considered to be anything that could negatively impact on the project meeting completion deadlines. For example, losing team members due to illness or attrition, not having taken team members' annual leave into consideration, the possibility of having to retrain new team members, equipment not being delivered on time or contractors going out of business. A risk log is used to record and grade risks and carries an associated action plan to minimise the identified risk. Issues management is an associated area and refers to concerns related to the project raised by any stakeholder. This phase also involves the Project Manager in **quality control**, whereby regular reviews are made in formalised meetings to ensure the 'product' that is being produced by the project is reviewed against specific pre-defined standards.

2. Progress Control

Progress Control is another responsibility of the Project Manager and is the monitoring of the project and the production of regular progress reports to communicate the progress of the project to all stakeholders of the project. As most projects do not go exactly to plan, the process of progress control is to keep an eye on the direction of the project and monitor the degree to which the plan is followed and take appropriate action if stages are deviating from the plan by employing regular project tracking. This is achieved by having regular checkpoints during the course of the project that will have been established in the project definition. These meetings may be weekly and are used to monitor and control all that is going on with the project as well as capture statistics from each project team member on actual start and finish dates for their allocated tasks as well as estimates for the next round of tasks.

By the nature of most projects never going exactly to plan, changes will need to be made to the length, direction and type of tasks carried out by the team. This has to be fully documented by the Project Manager in the form of "change control". **Change control** involves the Project Manager in documenting requests for change, identifying the impact on the project if the change is to be implemented (e.g. will it affect the finish time of the project, will the project run over budget, are there enough resources) and then informing all stakeholders of the implications and alternatives that the request for change has identified. The implementation phase ends once the project has achieved its goals and objectives as detailed by the key success criteria in the Project Definition Report.

Closing a Project

All projects are designed for a specific period of time and the process of project closure is an important aspect of project management. The purpose of a formal closedown to the project is to address all issues generated by the project, to release staff from the project and go through a 'lessons learnt' exercise. At this stage a formal acceptance from the customer is gained to indicate their sign-off on the project. This is generally done in the form of a customer acceptance form and is the formal acknowledgement from the customer that the project has ended. Once signed off, the project team is disbanded and no more work carried out. However, the project team will come together for what is called a Project Review Meeting, to formally end the project and go over any outstanding issues such as ongoing maintenance, the closing of project files and conduct a team review of the project. As a result, a Project Closure Report is created to formalize how successfully the project has achieved its objectives, and how well the project has performed against its original business case, the scope, project plan, budget and allocated timeframes.

The Project Manager may also create a process improvement document that reviews the processes used by the project so that the organization can learn from this project and make further projects more successful.

What does it take to be a Good Project Manager?

Aside from understanding the methodology, there are other characteristics to keep in mind for successful project management. Given that any project is involved with a project team as well as the stakeholders, a good Project Manager needs to have not only excellent time management skills but also good people skills such as:

- Excellent communication skills.
- The ability to be a team player.
- Excellent interpersonal skills.
- The ability to negotiate.

Experienced Project Managers believe there are two key factors in determining the success of a project:

1. Recruitment and selection of suitably qualified project members to relevant project positions is essential. Recruiting of project team members should be handled with the same discipline and rigor as the recruitment of new employees to fulfil the ongoing positions in the business.

2. A well documented methodology that is kept simple and easily adaptable to different sizes of projects is a critical foundation for ensuring project success. This documented methodology needs to be communicated to project team members as part of the initiation stage. This will ensure such things as everyone having a clear understanding of how to progress and what is expected at each stage and that the methodology is adapted to the specific needs of the project being undertaken.

Benefits of Project Management

Project Management creates a vision for success, for clients and teams, and gets everyone on the same page of what's needed to stay on track for success.

Professional project management provides many significant benefits, including the following:

Stakeholder Benefits

- Better scheduling and budgeting
- Better cost containment
- Better communication throughout project including process mapping and progress reporting
- Better change management processes including configuration management
- Better quality planning, quality assurance processes, and quality acceptance steps
- Earlier attention paid to "red flags" – project problems that may be indicators of more trouble to come.

Team Member Benefits:

Allows the creative team the freedom to focus on the activities most aligned with their talents and passions:

- Less rework
- Better definition of work requirements
- Better understanding of roles and responsibilities
- Improved productivity of work through

Functional Manager Benefits:

- Better allocation of resources
- Better communication throughout the company

- Improved work instructions
- Allows functional manager to focus on the department resource leveling, staff retention and training, and quality processes for their specific area.
- Improved project documentation processes and expansion of the organizational retained best practices.

Senior Manager Benefits:

1. Better use of company resources.
2. More attention to risk management.
3. Better project cost and schedule estimating.
4. Better project monitoring and control.

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Types of Projects (seminar)

Project scope: This describes the reach and scale of the project. A project scope varies depending on the amount of people involved and the scale of the impact of its outcomes. Projects can be big or small depending on the scope.

Timeframe: A project’s timeframe is defined from its initiation or conception until result evaluation. A project’s timeframe can also be divided into smaller blocks which in themselves have their own timeframe.

Stakeholder Management: Projects can vary depending on the number of stakeholders involved. Sometimes, the only stakeholders involved in a project is the team and project manager, but more often than not, there are a wider group of stakeholders involved. The more stakeholders, the more complex the management of their expectations and communication. You can choose between these types of leadership.

Task assignation: Within the different types of projects in project management, there are many different tasks and activities. Projects can vary depending on how these tasks are assigned to team members- whether they will be completed by individual members or groups and how responsibilities will be defined.

Quality of results: Results of projects vary among the different types of projects. They can vary depending on each client's requests.

Classification of Project

Every Project is different. Projects can be classified on several different points. The classification of projects in project management varies according to a number of different factors such as complexity, source of capital, its content, those involved and its purpose. Projects can be classified on the following factors.

According to complexity**:**

1. **Easy:** A project is classified as easy when the relationships between tasks are basic and detailed planning or organization are not required. A small work team and few external stakeholders and collaborators are common in this case.
2. **Complicated**: The project network is broad and complicated. There are many task interdependencies. With these projects, simplification where possible is everything. Cloud-based apps will immensely help to simplify complicated projects by automatically calculating the project's best work path and updating any changes introduced through its use of different types of project management tools. Here, the importance of project management and how an effective tool could help you!

According to source of capital:

- **Public:** Financing comes from Governmental institutions.
- **Private:** Financing comes from businesses or private incentives.
- **Mixed:** Financing comes from a mixed source of both public and private funding.

According to project content:

- **Construction:** These are projects that have anything to do with the construction of a civil or architectural work. Predictive methods are used along with agile techniques which will be explained later on.
- **IT**: Any project to do with software development, IT system etc. The types of project management information systems vary across the board, but in today's world are very common.
- **Business**: These projects are involved with the development of a business, management of a work team, cost management, etc., and usually follow a commercial strategy.
- **Service or product production:** Projects that involve themselves with the development of an innovative product or service, design of a new product, etc. They are often used in the R & D department.

According to those involved**:**

- **Departmental**: When a certain department or area of an organisation is involved.
- **Internal**: When a whole company itself is involved in the project's

development.

- **Matriarchal**: When there is a combination of departments involved.
- **External**: When a company outsources external project manager or teams to execute the project. This is common in digital transformations, process improvements and strategy changes, for example.

According to its objective**:**

- **Production**: Oriented at the production of a product or service taking into consideration a certain determined objective.
- **Social**: Oriented at the improvement of the quality of life of people.

Educational: Oriented at the education of others.

- **Community**: Oriented at people too, however with their involvement.
- **Research**: Oriented at innovation and the gaining of knowledge.

Types of Project Management

All types of project in project management follow a certain approach. There exist various methodologies through which project management can be carried out. Online software such as Sinnaps, an effective Wrike Alternative, employs some of these methodologies to ensure that **your project is managed as efficiently and effectively as possible.** Here are some of the types of project management approaches.

Critical Path Method (CPM): This method was developed in the 1950s and is based on the idea that some tasks cannot be started until others are completed. This highlights **task interdependencies.** The critical path method identifies the most optimised work path to follow taking these dependencies into consideration so that you can finish your project in the least time possible.

Critical Chain Project Management (CCPM): this methodology focuses primarily on the resources needed to complete a project and its tasks. The critical chain is identified which pinpoints the project most critical tasks. In turn, the resources are reserved for these high-priority tasks.

The PMI/PMBOK "Method": this methodology encompasses the breakdown of different types of projects into five project groups agreed upon by the Project Management Institute (PMI). Essentially it refers to following the project management life cycle and each phase's demands.

Agile: this methodology was developed in 2001. It focuses on effective response to change, comprehensive documentation and individuals interacting over processes and tools. Continuous collaboration is key between both team members and other project stakeholders.

Scrum: is a variation of the Agile methodology and is its most popular framework. It is simple to implement and solves many problems that software developers have faced such as convoluted development cycles, delayed production and inflexible project plans. A small team is typically led by what is called a Scrum Master who clears all obstacles that prevent efficient work. Teams work in 'sprints' which are short cycles comprised of two weeks normally and typically meet daily to discuss progress.

Kanban: Kanban is a methodology based on a team's capacity to do work. It originated from Toyota in the 1940s. It is a visual approach to project management and is useful for work that require steady output. Teams move through the progress of their project visually which allows for a clearer identification of any roadblocks or bottlenecks that may occur along the way.

Types of Project Reports

Reports are a central part to project management and there exist many different types of project management reports that are drawn up by project managers for different reasons. The sheer amount of reports can seem overwhelming. Here are some examples of some of the different types of project reports that project managers need to fill out:

1. Status Reports:

Status reports are commonly drawn up to present to sponsors or certain stakeholders that will be affected by the outcome of the project and must be kept up-to-date on the project's progress. It is the most common type of report and one that project managers work on regularly. They can be weekly, or monthly and their frequency will depend on the stage your project is in and how much there is to say.

2. Risk Reports:

Risk analysis and management is key to project management. Risks must be analysed and kept under control so as to not cause serious damage to a project. Risks are reported at least monthly and usually come out after a risk review meeting. This report includes a risk profile of the project and how you are managing or intend to manage the risks. Here, we explain how to do a Risk Management Plan.

3. Board/Executive Reports:

Each report must be written bearing in mind the audience to which it will go out. For project board reports, a high level of detail should be maintained about the project. Different types of project organisation reports follow a different format to their documents, but all are very detailed. This can help in the sense that board members can pinpoint certain problem areas that they can help with. The more know the more chance of success. It should be in a format that is easily readable and easy to follow.

4. Resource Reports:

Working out resource allocation by hand would take up a lot of time, especially if a project is large-scale and more on the complicated side. Project management software such as Sinnaps uses a modernised version of the Gantt Chart called the Gantt-flow that automatically works out your resources and keeps track of them for you. You can learn more about it here: Online Gantt Chart maker.

Essentially, it is a resource report in itself identifying who is doing what with what resources and within what timeframe. It helps to ensure you have no resource clashes and makes the project more efficient as a whole. This type of report is arguably one of the most useful for project managers.

Types of Meetings

Meetings are another central part of different types of projects and project managemen**t.** This is due to the fact that projects are carried out more often than not by teams and not individual people. They are a good way to **coordinate people** and get them on the same page. It is also more efficient to spread information once at a meeting rather than twenty individual times. As in the case with other aspects of project management, there are different types of project meetings:

Kick-off Meetings:

Kick-off meetings are very important for every project. They are held at the beginning of a project and include everyone involved in the project's execution. These meetings help to build trust and motivation among team members and helps to ensure that everyone is on the same page and aware of what needs to be done.

Status Update Meetings:

This type of meeting is one of the most common meeting is project management. Its aim is to align the team on project progress, challenges, changes and next moves. Problem solving, decision making and task assignment are all factors of status update meetings.

Information Sharing Meetings:

Much as the name suggests, this meeting allows team members and project managers to essentially share information! Debates, keynotes and lectures tend to appear. These meetings are very important in terms of communication as they clearly outline anything that needs to be known by the rest of the team. Visual communication tools are very useful and common in information sharing meetings.

Decision Making Meetings:

Most business decisions are made during group meetings. Decision making in general tends to be a part of every kind of meeting. The bigger, more important decisions, however, have their own dedicated meeting where information sharing, gathering, brainstorming and evaluating solutions and voting are a common occurrence.

Problem Solving Meetings:

This kind of meeting is generally known as the most complex type. Scopes and priorities are defined as well as current and potential problems that need resolution. Brainstorming is a common activity and the aim is to reach an agreement on future steps to be taken by the team.

Innovation Meetings:

These are creative meetings used to motivate team members to brainstorm and come up with new innovative ideas for anything from problem resolutions to new product and service ideas. Ranking and evaluation of each idea then moves on to creating a more short and concise list from which eventually the best option will be chosen.

Overall, projects are a complex phenomenon needed by us to achieve goals and objectives. They occur all the time around us, even if we don't consciously notice them.

Project Approach in Marketing (Workshop)

The Workshop will be presented by the trainers.

Week 12. MARKETING FOR NGOs AND NPOs

Principles, Concepts, and Methods of marketing for Non-Profit sector (lecture)

Plan:

1. Determine Your Target Market.
2. The importance of marketing in nonprofit organizations.
3. Distinctive features of marketing for NPOs.

1. Determine Your Target Market

Even the most altruistic organization can't do much good unless people know about it. Your nonprofit needs strong relationships with donors, volunteers, the media, and even government organizations in order to pursue its mission effectively.

Marketing helps your nonprofit:

1. Spread your message and mission statement.
2. Bring in new donors and new revenue.
3. Satisfy current donors by showcasing your success.
4. Create strong relationships with other organizations and government agencies.
5. Gain exposure in the media.
6. Alert the public to important events and news.
7. Reach more people with the work you do.

How to Market Your Nonprofit

Your organization's marketing efforts should be ongoing in order to maintain your relationships, bring in consistent donations, and keep your work in the public eye. Even if your nonprofit doesn't have the budget for a dedicated marketing team, there are still steps that every staff member can help out with to create a marketing plan.

Before you can take action to market your organization, you need to know who you are trying to reach and what you want them to do.

- What is their age or gender?
- What is their income level?
- Do they trust certain news sources?
- What social media platforms do they use?
- What's the best way to contact them?
- What issues are most likely to stir their interest?
- Do you want them to donate, volunteer, join your organization, or spread the word?

Once you know who your audience is and where they can be found, you can tailor your marketing efforts to reach them and prompt them to take action. You may find it helpful to research organizations similar to yours to see how they market themselves to the same audience.

Set Measurable Goals

You won't know whether your nonprofit marketing is effective unless you know what you're trying to achieve. Having measurable goals gives you a way to evaluate what is working and what needs to change.

The goals you set should make sense for your organization and mission and may include:

- Donations or revenue
- Email list sign-ups
- Donor/member retention
- New donors/members
- Yearly initiatives you want to achieve
- The number of people you can help, events you can hold, or any other service your nonprofit provides

Once you set your goals, strategize with your team to determine how you'll measure progress toward reaching them.

Create Marketing Materials

Do you mail brochures or postcards? Send thank-you notes to donors? Are you likely to make appearances or have an information table at events? Do your staff members use business cards?

Any time you interact with the public, your nonprofit needs marketing materials. These materials should be branded for your organization and include information that showcases the accomplishments, services, and values of your organization, along with information about how to get involved or where to donate.

Larger nonprofits may have an in-house art department to put these marketing materials together. If your organization is smaller, look for a local graphic design shop. For nonprofits on a tight budget, you may get a better price from a freelancer who doesn't have the same overhead and staffing costs of a design firm.

Set a Social Media Strategy

A social media marketing strategy is a cost-effective way to reach new donors and gain popular exposure. Social media platforms such as Twitter, Facebook, and Instagram can provide an avenue for reaching a large number of people interested in your organization.

Rather than trying to be active on every social media platform out there, identify the two or three platforms where your target market is most likely to be found. Then, focus your energy and marketing efforts there.

The best part of this type of marketing is that social media has no physical boundaries. You can connect with people in your own backyard or those halfway around the globe, allowing you to expand the reach of your nonprofit.

Update (or Create) Your Website

A key part of your nonprofit's internet marketing presence is creating a professional-looking website and updating it regularly. If you don't have a website, or if it hasn't been updated recently, you'll need to invest some time and money in it to create a pathway for online marketing.

Your website shares important information such as:

- Your nonprofit's history and mission
- Breaking news
- Upcoming events and initiatives
- Success stories
- Press coverage
- How to donate money or volunteer

You want a website that looks professional and trustworthy if you want visitors to leave with a positive impression of your organization. If there is someone web-savvy on your nonprofit staff, they may be able to create a simple website by purchasing and editing a design template. Otherwise, you'll need to hire a designer.

Once your website is built, monthly updates should be part of how you market your nonprofit. Frequent updates improve your website search engine optimization, which makes it easier for people to find you online. Updates also tell important people, like donors and the media, that you are an active and involved organization.

Create a Database

Once you have your marketing materials in place, it's time to start using them. But you can't do that until you develop a database of current and prospective members.

Regular and carefully planned communication is key to convincing people to donate or get involved. You can use your database to plan marketing initiatives such as:

- Special mailings
- Follow-up phone calls
- Event invitations
- Newsletters
- Media outreach
- Yearly donation drives

A database allows you to divide your audience into groups based on a number of factors, such as whether they have already donated, their income level, or if they prefer to be contacted by email or regular mail. This is known as market segmentation, and it helps your nonprofit market in the most cost-effective and effective way possible.

Showcase Your Results

Your marketing should showcase not only the mission of your nonprofit but also the tangible results you've achieved. Success stories motivate current members to stay involved, attract new members, and create an interesting angle for media coverage.

Showcase your results through:

- Emails or mailings to donors
- Press releases
- Website updates
- Local or national events
- Op-eds in local or national news outlets

Share information about fundraising results, the people or organizations that have benefited from your nonprofit's work, projects you've completed, laws you've influenced, or other concrete measures of success.

Form Partnerships

Marketing your nonprofit isn't always a solo activity. Strategic partnerships can expand the reach of your marketing efforts.

Look for ways to work with the people or organizations who are in sync with your mission and can help advance your work. These could be other nonprofits with similar or parallel objectives, local volunteer groups, businesses looking for philanthropy partnerships, or government agencies.

And don't forget media coverage. Share your expertise with reporters who are looking for sources about timely issues, or send a press release about your organization's achievements to media outlets. This step alone often brings substantial enrichment and marketing opportunities to nonprofit organizations.

2. The importance of marketing in nonprofit organizations

The history of human is filled with efforts to meet continuously increasing needs from their self-sufficiency stage to welfare society stage. On the one hand, the producers who bring together raw materials, labor, capital and technology to produce a product for the needs of people, on the other hand, the consumers who aims to satisfy their needs and pleasures with their incomes, both conflict and need each other continuously. In this sense, "Marketing" notion has gained a very important role and also become crucial for all kind of organizations and consumers.

So what is marketing? Why do we need it? Is it just a promotion or advertisement? Or is it an unnecessary expense? Indeed, marketing has a very simple meaning: Marketing is a strong connective bridge between consumers and producers to provide optimum benefit for each side. And, by the way, to make this bridge strong and long-lansting, you have to implement a strategic steps as planning, analyzing, organizing and controlling. So, we can easily say that marketing is not just a promotion or advertisement, marketing is a holistic view.

When we look at literature, we see that there are many definitions about marketing. Mainly, marketing for a profit organization can be defined as a management process to achieve organizational goals and making money by observing the needs of target market and satisfying them better than competitors.

Customer needs is the key point for any organization to be successful. However, when we think about customer needs, we generally talk about physical goods and services. Indeed, there is also an important need that effect the people's life directly: "social needs". So especially in recent years satisfying social needs that create social value and promote opportunities for people to have active and effective role in society, become crucial as well as satisfying physical goods and services needs. In this sense, the NPOs which provide social benefit and welfare by producing social needs (values, ideas, etc.) get a higher position in social life as physical goods producer organizations. When focus on the organization types of NPOs (trade unions, associations, private schools, mercenaries, political parties, etc.), it is seen that they include extremely different types from small local associations to quite big professional organizations and also active in many areas as education, culture, art, nature, sport, law, etc. So, it can be seen obviously that all NPOs are related to every segment of society and play a key role for them by providing services not available by profit organizations. Thus, marketing has very essential strategic meaning for NPOs to sell their social products to their target market. Although there is a great tendency toward marketing for NPOs, there are still lots of people related with NPOs' actions think that marketing is not necessary for these kind of organizations. These opponents argued that marketing expenditures wasted the organization's sources and sometimes the advertising activities created negative sensation on target groups. So there is no need to spend any time or money for these marketing activities. However, they have to be aware that they have powerful competitors especially operate in private sectors and need marketing to stand against them.

3. Distinctive features of marketing for NPOs

Global and regional development has led to an increase in the number of NPOs. Contrary to sell any physical products, they serve their mission, vision, objectives to target customers for their social benefit and they should ensure active promotion of these services to get support and to survive in this competitive environment. So, promoting themselves effectively as well as developing and maintaining relationships with key stakeholders, supporters, customers etc., has utmost importance for NPOs' managements.

Customer Groups

No organization can develop an effective strategy without knowing its customer. For POs, it is easy to identify the customers and know who they are exactly. But for NPOs, identifying the customers are considerably more confusing. So, who is the customer of a NPOs? and how we define them?

When to focus on consumer groups of NPOs, we can divide them into two basis customer groups: "Supporting Costumers" and "Primary Customers". Supporting customers group is the main difference between NPOs' and POs' customer mass. This group consist of donors or volunteers and are the contributor part of NPOs. The primary customer group is similar to the customers of POs and directly apply for the services to get contribution from NPOs according to their expectations. Figure 12.1 is shown below about these customer groups.

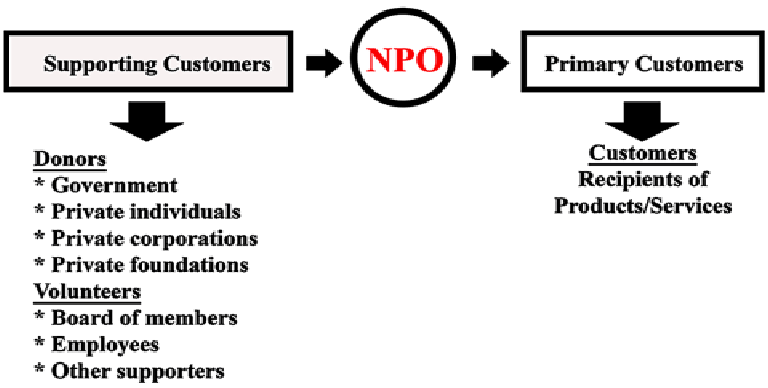

Fig12.1. Customer groups of NPOs

Supporting customers participate to NPOs by providing money, labor, service, materials, etc. and these people may benefit from the organization in various ways. For example, governments can get NPOs as partner to deliver public service programs or they can purchase services from NPOs, rather than organizing with their own departments. Some popular private individuals donors can benefit from NPOs to create a good impression on their fans. We can easily increase the numbers of examples for supporting customers benefits. Therefore, NPOs also benefit from these customers to survive their selves and serving their services. So, they have to satisfy these groups also.

On the other hand, primary customers are the main target group of NPOs. And their subgroups' names generally change according to the organization's main aims and roles in society. For example, the people are called as "visitors" who come to the museums to see the artifacts or the people are called "congregant" who get services from religious institutions. The people who get services from the universities are called as "students" or the people who watch theatre are called as "audiences". These primary customer benefit from the services of NPOs directly. So generally, the NPOs determine their objectives and implement activities related to these objectives for satisfying of these groups.

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Strategic Marketing Planning in a Non-Profit Organization (seminar)

Creating a Nonprofit Marketing Strategy

A good nonprofit marketing strategy looks at the end goal and considers the best method of reaching that goal given all of the contributing factors for your specific nonprofit. This means considering things like your target audience for each goal, your marketing budget, and the capacity and capabilities of your staff. Because of all of the possible contributing factors for each individual nonprofit, a one-size-fits-all nonprofit marketing strategy doesn't really exist.

That being said, there are goals and channels commonly shared amongst the nonprofit marketing community that can be easily adapted to something that could work for your organization.

To help get you started, we've outlined three common nonprofit goals and brainstormed the ways a typical nonprofit might achieve them using three common marketing channels. We're planning to increase donations, boost volunteers and spread awareness using a nonprofit website, email marketing and social media.

But again, if your nonprofit has different goals or uses different channels, you may have to pick and choose to get where you need to go. And even if this plan fits your organization perfectly on the surface, it's a good idea to make tweaks based on what you know about your audience of supporters and potential supporters.

GOAL 1: INCREASE DONATIONS

If your nonprofit would like to focus on increasing donations, the following marketing projects could fit into your nonprofit marketing strategy.

- **Include the Donate page in the main navigation:** So long as it makes sense for your structure, keeping your Donate page in the main navigation means a visitor can find that page no matter where they are on your site.
- **Add a Donate call to action on the homepage:** Your homepage is often the most visited page on a nonprofit website. Use that prime real estate to make your case for donations.
- **Create landing pages for key fundraising campaigns:** These pages will provide the details of the campaign and offer a place for you to send people through promotional materials.
- **Highlight dedicated donors and provide impact updates on the blog:** When donors can see the impact that their gifts provide on a regular basis, they may feel inspired to give more often.
- **Set up online donation conversions to track in Google Analytics:** Setting up conversion tracking will let you track your progress toward your goal of increasing donations.
- **Send Thank You emails to donors after they've given:** As part of your donor retention efforts, you should (at the very least) be thanking everyone who gives to your organization.
- **Segment your email list to include a group that only sends to donors:** Donor segmentation will allow you to send more customized messaging and organizational news to donors.
- **Send additional emails to update donors on the impact of their gift:** Most often, keeping current donors is much more beneficial than attracting new donors. And that means spending the time to cultivate and retain donors.
- **Use automated emails as a piece of your next fundraising campaign:** Provide details and drive supporters to give to the campaign through a timed workflow of emails.
- **Weave in calls to donate:** These calls to action can be as a part of your fundraising campaign and impact updates.
- **Give supporters an easy way to fundraise through social media:** For example, create a kit to get supporters started with Facebook Fundraisers.
- **Follow and communicate with current and potential sponsors on social media:** This is a great way to build relationships that may lead to additional sponsorships.

GOAL 2: BOOST VOLUNTEERS

Want more helpful volunteers to move your mission forward? We've seen these strategy components work to achieve that goal.

- **Post volunteer opportunities on your website:** Using a volunteer management system allows you to control and communicate with volunteers for each of your opportunities.
- **Add a volunteer call to action on the homepage:** Your homepage is often the most visited page on a nonprofit website. Use that prime real estate to make your case for volunteering.
- **Ensure that the volunteer page is easy to find in your website structure:** When you organize (or reorganize) your website structure, keep the Volunteer page in a logical location, such as within the Get Involved section.
- **Highlight dedicated volunteers and new opportunities on the blog:** These blog post ideas are all about volunteering. You can then post these highlights on social media as well.
- **Set up online volunteer sign-ups to track in Google Analytics:** Setting up conversion tracking will let you track how well your efforts to increase volunteer sign-ups go.
- **Send thank you emails to volunteers:** Send a thoughtful email after someone volunteers for the first time and on corresponding holidays, like Thanksgiving and Volunteer Appreciation Week. Regular emails can work to encourage community and relationship building, establishing a positive relationship that keeps volunteers coming back.
- **Segment your email list:** Include a group that only sends to volunteers and target your email content to volunteers.
- **Update volunteers on the impact of their work:** This can be accomplished through email or social media, depending on what your volunteers prefer.
- **Post opportunities on social media:** Weave in posts about new volunteer opportunities and opportunities that need to be filled.

GOAL 3: SPREAD AWARENESS

If you're looking to expand your reach and let people know about your organization and mission, we have some ideas that might push the needle.

- **Include content to learn about your cause on your website:** When you're spreading the word through other marketing channels, it's nice to have an informative page to send people to so they can learn more about your top issues.
- **Add a short description of what you do at the top of your homepage:** New visitors can get a good idea of what you do right off the bat. Check out our demo site to see this in action.
- **Include calls to action for those new to your cause throughout your website:** A good call to action example could be joining your email newsletter.
- **Provide an easy way for new visitors to sign up for your email list:** This could be a page with a form on your website, or even a call to action that appears in the sidebar and/or footer of your nonprofit's site.
- **Send out a regular email newsletter:** Sending out regular newsletters

helps educate your subscribers and keep them engaged in the cause.

- **Optimize blog posts for search engines:** Publish blog posts about topics related to your cause and optimize them for search engines to drive additional traffic.
- **Research social media channels before joining:** You want to make sure that your target audience regularly engages on those networks before dedicating the time to be active on new channels.
- **Maintain an active presence on all the networks you use:** To accomplish this, consider creating a posting schedule and sticking to it.
- **Consider creating a social media ambassador program:** Supporters can then become ambassadors and spread awareness among their followers.
- **Research and use hashtags related to your cause:** Make sure to follow the best practices for using hashtags on each network.
- **Engage and communicate with influencers in your field:** Research potential partners and supporters to strike up a conversation with them on the social media channels that they're active on.

Creating the Unique Marketing Mix (Workshop)

The Workshop will be presented by the trainers.

Week 13. HOW TO CONDUCT NATIONAL AWARENESS DAY?

What is National Awareness Day (NAD), purpose and strategies (lecture)

Plan:

1. Successful disability awareness campaign.
2. Multiple-level thinking and acting.

1. Successful disability awareness campaign

National Awareness Day. National Awareness Days generally have a fun, or quirky side to them, and are, in some cases staged by commercial organizations to help promote their products and services. But, they often have a serious side too and any donations received as part of any events held on the national day are often given to associated charities by these companies.

Current challenges:

- Lack of awareness of positive and realistic images of persons with disabilities in all sectors and strata of society.
- Lack of targeted, long-term and systemic awareness-raising inclusion campaigns and strategies.
- Failure to make use of innovative technologies and approaches in awareness-raising campaigns and in disseminating good practices.
- Insufficient use of the potential for personal participation of persons with disabilities in promoting a realistic and positive perception of the persons concerned based on real-life experiences.

The success of awareness-raising strategies taken by the authorities at any level in any state will depend on the extent to which they apply a multi-sector approach, thus including all relevant stakeholders in the public and private arena. Both community initiative and high-level political action are indispensable to build a wide enough support base.

The checklist at the end of this study will provide specific questions to ensure that a holistic and sustainable approach has been adopted. Elements of success from good practices can be selected based on specific needs and interests of a particular organization / institute and locally adapted.

According to the *World Health Organization*, roughly a billion people today live with some form of disability, making it the largest minority group in the world. Out of this number, around 110-190 million have extremely significant difficulties in day to day functioning. To disambiguate the term, disability is a broad term referring to impairments, activity limitations and participation restrictions. These may be caused by disease, accident and others. Disabling conditions include a variety of examples like blindness or permanent injury caused by accidents to invisible illnesses like chronic pain conditions. Because of this, many individuals and groups start campaigns to raise awareness, obtain donations or to create legislative change. Running an awareness campaign is no piece of cake but is an extremely rewarding endeavor. Here are some basic tips to make a successful disability awareness campaign.

First, make a concrete list of goals you would like to achieve. Are you focusing on raising money for research or to sponsor people for treatment or medical detox? Do you wish to campaign to law-governing bodies or to bring information to the public? Your goals can be a mix of these, but it is best to write them down in order for you to be able to create means to have these goals met. Come up with a strategy and action plan. If you want to ask professional help, hire a marketing or campaign consultant. Although it is not a profit-directed campaign, marketing still plays extreme importance in these types of awareness campaigns.

Second, fully research your cause. Know the facts, and be ready to present them in forms of flyers, discussions, seminars and more. “Selling” awareness on disability is not as easy as marketing a jackleg drill. Get in touch with persons with disabilities and find out first-hand about their struggles and insights. Most persons with disabilities struggle with the basic question of what is the worth of a human being to society who cannot produce “money”. Others feel that many people do not understand their conditions and are treated as over-reacting and unreasonable. Many others struggle with getting proper health care and compensation. Many disabled individuals find it difficult to get decent jobs or avail of small business loans in the hopes of starting an entrepreneurial endeavor instead. Tapping into the minds of the actual victims can provide you extensive insight on how and towards what you direct your campaign. The world of the disabled is filled with startling and shocking facts. Present them strategically to your audience to evoke the desired action.

Third, determine your audience and divide them into different target groups. Your goal may be to target your entire community, but it is best to have a different approach to different audience types. In that way, you can also maximize the capabilities of your team and volunteers. For example, the awareness campaign approach for students is a completely different ordeal than raising awareness to companies and executives.

Fourth, it is always of great help to have a prominent individual as spokesperson. Have the mayor come in for a talk, or invite a celebrity with a disability to join the cause. Strive to get as much attention as possible. Have guest speakers who have the authority to speak about your cause. Take advantage of a popular individual’s charisma and influence to further your cause.

Fifth, strategically plan the date of your campaign. Employ commonly recognizable symbols like the purple ribbon which stands for an array of disabling health conditions like chronic and auto-immune diseases. There are several awareness ribbons which you can use in your campaign.

Sixth, have a thorough grasp of your budget. Before you even start your campaign, be sure you have enough resources to pull through the entire plan. You may need some form of fundraiser to get donations from people. You can also avail of a small loan to get things started. If you intend to take out a considerable amount of money from your own resources, make sure to find ways to settle your own financial situation as much as possible.

2. Multiple-level thinking and acting

It is important to understand the "awareness-raising logic" to build effective strategies. Strategies to combat discrimination or existing prejudices against persons with disabilities which use awareness raising must be designed to impact on various levels at the same time, as each level links to possible causes of the problem (for example: insufficient awareness about the legal rights, labelling persons with disabilities as one group and prejudices about the individual abilities of persons with disabilities).

The Figure 13.1 below shows a relationship between various levels and how to influence them. One can identify the individual level (micro), the social-organizational level (meso), and the institutional level (macro) of thinking and acting. What is important to influence is the way people think and reason, which touches upon their identity and attitude. Aiming to change behavior is the hardest when campaigning or taking action. The social-organizational level can be considered as the meso level where people interact with their environment, colleagues, friends, and where organizational culture also plays a role. It is likely that people will share similar ideas and opinions with people they have most frequent contact with. When trying to influence the meso level (for example to combat prejudices), people can be influenced via their social environment and networks. The macro level, the broader society, is considered to be the political-institutional level where legislation and policies are created, where democratic institutions fulfil a public role. These institutions influence the possibilities for people to work, live and learn (see Figure 6.1). For awareness-raising strategies to be effective and sustainable, action on the three areas, at these three levels, is needed. It is important that authorities do not only think at macro level how they would like society (which might be interpreted as "the others") to deal with disability, but also analyze themselves as an organism to raise awareness within the public organization(s) (meso level).

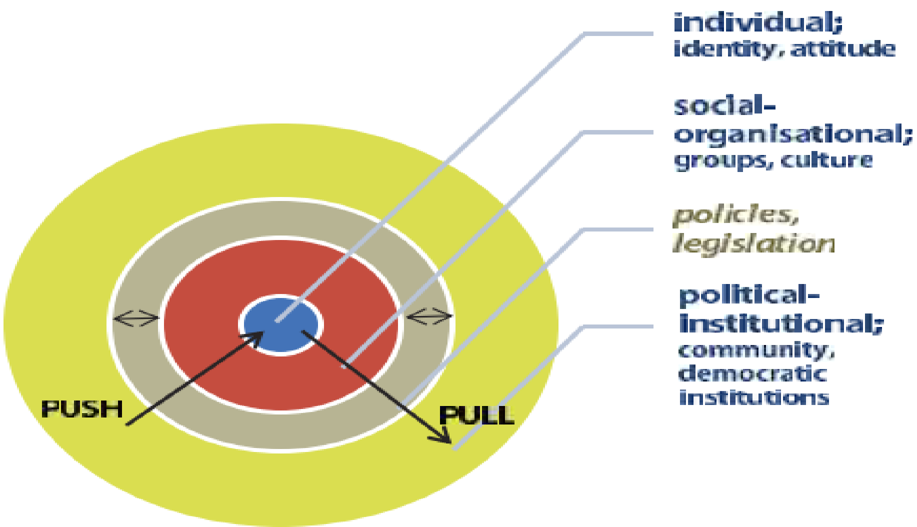

Figure 13.1. Awareness-raising logic

Thirdly, the way in which each individual within the organization/institute acts on a day-to-day basis (micro level) is more than crucial to contribute to the success of such strategies. The meso and micro levels should be further taken into consideration as they make actions more tangible. The three levels reinforce each other.

According to the "PUSH-principle", people and organizations/companies are told what to do or not to do. This approach only works well due to the repetition of the message, people need to be reminded of the message time and again and sanctions need to be installed. Much more effective and flexible in a contemporary environment is applying the "PULL-principle". Measures to be taken need to be co-created by various stakeholder groups and solutions must be shared. Creating self-awareness of people can change things on the ground. This is more than just raising awareness, it is using people's skills, knowledge and energy so they are motivated to make it work and last in the long run.

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Strategies for National Awareness Day (seminar)

How does the Awareness Day fit into your overall mission? Awareness Day events can require a significant amount of effort (such as staff time and resources). It is important to be able to describe specifically how the Awareness Day aligns with your organization's mission and what outcomes you can achieve from an event. Whether or not your organization decides to host an event, it is useful to consider partnering with other HIV organizations and like-minded organizations beyond the HIV community.

When should you host an event vs. support another organization's event?

You may want to host your own event if:

1. You are the lead organization for the Awareness Day.
2. The topic is a central part of your organization's primary mission.
3. Your organization has subject-matter experts who can speak knowledgeably

about the topic.

4. Your organization has existing outreach communication channels that you can leverage during the event.
5. You may rather support another organization's event if:
6. The topic is not a central part of your organization's mission.
7. Your organization does not have subject-matter experts who can speak knowledgeably about the topic.
8. Your organization does not have the fiscal resources or actively use outreach communication channels that you can leverage during the event.
9. Your communication plan requires focusing on other activities and messages during the period you would need to be planning or hosting an event.

What does success look like?

Defining success before an event is an important way to assess your outcomes. Some examples of success measures include:

- Number of HIV tests administered.
- Increased patient visits.
- Increased visibility for your organization.
- Strengthened partner relationships.

What resources are available to help you achieve success? These resources can include both internal resources and those available through partnerships. Examples:

- Website(s)
- Email lists/newsletters
- Social media channels
- Traditional media contacts
- Graphics production
- Video production
- Social media expertise
- Experience/expertise with event planning and evaluation
- Notable individuals/spokespersons; board and consumer advisory board members
- Staff, volunteers, and interns engaged in past events and special projects
- Fiscal resources
- Toolkit from the national lead organization(s) for the Awareness Day.

Planning Phase

In developing your plans for your observance activities, here are some considerations:

Planning Activities

- Identify your primary call to action. What do you want people to do? Examples include:
  - Attend an event
  - Find a testing location
  - Take an HIV test, get in care, and stay in care
  - Make an appointment

- Share their stories
- Watch a video
- Read more information

- Check to see if there are similar or overlapping events around the same time, to avoid having to compete with other activities that might draw your target audience(s) away.
- Consider using the national theme and communication resources rather than reinventing the wheel.
- Choose the type of event or activity you plan to do based on the outcome you are hoping to achieve. For example, if you want people to know their status, consider holding an HIV testing event. Some ideas for events include:
  - Public forum or town hall meeting on local impact
  - Essay contest
  - News conference
  - Visit to a local HIV/AIDS service organization or open house
  - Proclamation
  - Cultural or faith-based events with speakers
  - Editorial
  - Public service announcements (PSAs) or media campaigns
  - Health fair with HIV testing
  - Award ceremony
- Develop a project plan with goals, success measures, roles and responsibilities, and due dates.
- Design and develop all supporting materials, which may include:
  - Website content and graphics
  - Social media content and graphics
  - Email content and graphics
  - Printed materials for distribution
  - Partner outreach materials
- Create an editorial calendar that shows deadlines for creating and publishing all materials to keep your organization on track.
- Draft a set of key messages and get approval from your leadership or partners if necessary. These messages will include text that you and your partners can use across various channels and communication products.
- Logistics considerations:
  - What venues are available to your organization and your partners?
  - Book space and vendors early!
  - What equipment do you need? Who can provide equipment and when is it available?
- Plan an HIV testing or awareness event:
  - Before planning an event, review CDC’s guidance for HIV testing in nonclinical settings.
  - Hosting an HIV testing event may require special considerations to ensure everyone follows appropriate privacy and clinical protocols.

- If another organization is providing the testing services, you may need to book their services early and discuss clinical/privacy protocols in advance.
- If you are offering on-site HIV testing (e.g., at a health fair), how can you increase the perceived potential value to reluctant attendees?

Partnership Activities

- Identify relevant partners:
  - HIV/AIDS service organizations
  - Community-based organizations
  - Local health departments
  - Local colleges
  - Digital/online partners
- Consider involving nontraditional partners, like universities, clubs, or businesses. Your selection of partners will depend on your existing network.
- Determine when/how to meet with partners to agree on roles and responsibilities:
  - Outreach messaging (coordinated via editorial calendar)
  - Communication channels to be used
  - Images, hashtags, and other event materials

Communication & Outreach Activities

- Identify which channels you want to use to reach your target audience. Make sure you use data about your target audience(s) and the communication tools they use in their daily lives to inform your selection.
  - Owned Media (This is content you fully control.)
    - Website
    - Blog
    - Social media
    - Email (newsletters)
    - In-person locations and/or pre-events
  - Earned Media (This is exposure you receive via word-of-mouth marketing.)
    - Promotion by partner organizations
    - Interviews with local media and/or bloggers
    - Cross-posts of your blogs and other social media content by your partners
    - Local event calendars
  - Paid Media (This is exposure you receive through paid advertising.)
    - Search advertising
    - Social media advertising (sometimes called "campaigns" or "boosting")

Implementation Phase

Communication and digital outreach about the Awareness Day can extend your reach to attendees, future clients, partners, and other stakeholders. Here are some communication resources that you and your partners can tap to support your event. Links to HIV.gov resources with additional information are included below, and a recent HIV.gov video provides helpful tips for social media planning.

- Communication & Outreach
  - Twitter: chats, live tweeting, Thunderclaps
  - Facebook: live streaming, personal stories
  - Instagram: event photos, takeovers
  - Snapchat: custom filters
  - Graphics: images and pictures to be shared online and via social channels
  - Videos and/or live streaming
  - Infographics
  - User-generated content (with hashtags)
  - Press events

On the day of your event, your tasks will naturally depend on the activities you have planned and the level of partner involvement. But be ready to capture the data and metrics that measure your success!

Assessment Phase

At the end of the Awareness Day, you will still have important work to do—including assessing the impact of your activities and what that means for future events. To make the most of your time and efforts, please consider the following:

Communication & Outreach Activities

- Curate pictures, articles, and videos from the event.
- Select and share a sampling of user-generated content to show participation by your target audience(s):
  - Tweets
  - Facebook posts
  - Instagram pics
  - Emails
  - Partner quotes
- Share lessons learned with the broader planning team and your organization.

Evaluation Activities

- Evaluation begins with checking with your stakeholders before planning an event/activity. You need to know whether they are interested (or could be with the right messaging!) before you expend a lot of effort developing an event or activities. Your stakeholders may no longer respond to messaging about a specific Awareness Day or only a subgroup of your audience may be very interested.
- Every event/activity should have an evaluation component.
- Based on the success measures you identified in your project plan, collect quantitative and qualitative data to assess your activities. Review with your partners and determine if you achieved success and whether or not you should support the Awareness Day again in this way next year.

<u>Partnerships</u>

1. Hold a debrief discussion to develop lessons learned for the next event.
2. Discuss how well your partnerships worked, what could be improved, and agree on a schedule to begin planning for the next Awareness Day.
3. Devote time to recordkeeping. Collect and share the planning resources that

you and your partners created and used so that no one has to start from scratch next year.

4. Thank your partners and your team. Let them know about the successes!

Work with stakeholders (Workshop)

The Workshop will be presented by the trainers.

Week 14. HOW EVALUATE CONDUCTED NATIONAL AWARENESS DAY?

What is evaluation of social event or campaign? (lecture)

Plan:

1. Creating a Successful Awareness Campaign for Native Communities.
2. Types of campaign evaluation.

1. Creating a Successful Awareness Campaign for Native Communities

Hosting an awareness campaign in your community is a great opportunity to kick off an ongoing conversation about a prevention topic. This may also evolve into a community-wide effort to stop harmful behaviors. This is a time for you to carry forward the lessons from your ancestors. It starts with making space to have those difficult discussions.

Your campaign should help educate your community on a specific subject by sharing basic information and providing examples. This will help community members have healthy conversations and increase awareness. This will begin the prevention process.

Any awareness campaign should include these next steps. They will help you create a strong campaign that will increase community awareness on your prevention topic.

Step 1: Choose Your Topic or Goals

The first step in setting up a campaign is deciding what you want to accomplish. These will be your goals. Your goals should include a few different things, but focus on one main point you want to get across.

Goals Should Be Measured

After you know what you want your awareness campaign to accomplish, it is important you know how you will reach those goals. Awareness is great, but it takes more for real prevention. Part of identifying your goals is knowing what success looks like. Measuring success can come from many areas, some include:

- Different community groups you reach
- Number of people using resources
- An increase in people reporting concerns
- Feedback collected from the community
- Formal surveys of the community and their opinions
- Number of people attending events and awareness activities

These measures should be specific, realistic, and time-oriented. They will help you know the impact of your campaign, give a reason for the money you spend on promotional resources, and help you influence partners within the community.

Knowing your goals for the campaign first, helps you plan your schedule, events, and your focus for awareness training.

Step 2: Find Your Resources

Awareness campaigns take a lot of resources. You might have a set budget to implement your campaign. Money is not the only resource you will be using. The following are all the resources needed for a good awareness campaign.

Identify Your Support

Beginning with Tribal Leadership, you may need to get their support for your efforts. The Tribal Council will want to know the concerns you want to address and to understand why you believe it's an issue in your community.

Elders Council/group should also be approached before you begin your campaign. They may have suggestions to consider before and during your campaign process. This may change how you will reach your goals.

Money

Knowing how much money you have to spend on your campaign is important before you begin. This will determine how you will advertise for your campaign, such as needing to pay for an ad in the newspaper or time to talk about your event on the radio.

When considering money, you should spend time learning what has worked and what hasn't, so that you are not wasteful. If this year's budget is set, track what is working well, what isn't, and the impact of your campaign. Use this to learn about how to adjust your budget for next year.

Time

Time is an important resource, especially if you have other jobs or only a few people to help with events. When planning timing for your campaign, carefully figure out how much time every event you are putting on requires. Know how much time it will take to plan, organize, and prepare the events. Decide if you will need volunteers or help from other programs, and how much time they will be giving to make your campaign successful.

Marketing and Promotional Material

Awareness campaigns often use promotional materials to draw interest to your table or event. These promotional materials are key to any campaign because they provide a passive way to allow the person receiving it to walk away with information and education on your topic.

Marketing and promotional materials appear in two ways:

1. Promotional materials acquired from a larger source giving your community an understanding about the topic on the national level.
2. Promotional materials that highlight facts and information about the topic and your community. It may also include additional events in your community on the same topic.

Keep in mind that as native people, we are drawn in by our visual interest or by touch so your marketing materials should appeal to your target audience. Your marketing materials for your campaign might change over time and need to be recreated frequently. When buying or making promotional materials, consider materials or handouts that can last longer and need less work to be reordered or redone. Place your orders ahead of time to make sure they arrive before you begin your awareness campaign.

Your resources determine how you will bring awareness on a topic and the type of events you can provide. Like goals, it is important to address these resources before moving forward with any other part of your campaign.

Promotional resources and educational materials specific for Native American communities can be found through PSA Worldwide.

Step 3: Segment Your Audience

When setting up a prevention campaign, you will need to know the different groups you will be impacting. A specific goal of your campaign might be to educate males on the effects of domestic abuse. This is an example of an audience segment that will require specific information.

Think about the possible reach of your campaign outside of your audience segment. Then, consider who else may benefit from the information and how you will reach those people.

Your audience will vary in each community, however, here are three common audiences:

1. People who are doing harm or at risk of doing harm regarding the awareness issue.
2. People affected by the issue in the community, or who are at risk of being affected by the awareness issue.
3. Community members.

It is important you determine which group will be your focus and how much information and education you can provide each group.

The first step is to look at each of your goals, and then use each goal to shape your work with the different groups or audience segments. When looking at each goal, it's important to understand what goal applies to each group, and how much information and education you can provide each group.

Each group will be impacted by different information and events. When setting up the campaign, it is also important to know how much of your resources you can spend on the different groups or audience segments.

The final step is efficiency. This means you want to reach the most people with as little resources as possible.

Step 4: Create a Schedule of Events, Programs, and Initiatives

Once you have your goals, know your resources and audience, you can plan the specific events of your awareness campaign. The type of events you put on should build from your goals, resources, and audiences to include various active and passive awareness campaigns.

1. A passive campaign method uses promotional materials or handouts to bring awareness and education on a specific topic.
2. An active campaign method may use educational sessions that present information directly to individuals and are designed to reach multiple groups.

Step 5: Create Action Plans for the Campaign

Once you have a schedule and outline for each event in your campaign, get specific. Every event or program requires planning. Plan and be prepared so your volunteers and other participating programs stay involved. With calendar in hand, build lists for each event you are hosting and work with these lists. The general idea of planning should answer the questions who, what, where, when, why and how.

WHO	includes the audience or community members you are hoping to reach and the volunteers, staff, additional programs or experts you need to make the campaign work.
WHAT	is the description of the event. What type of activities will be happening during this event? What are the resources involved behind the scenes of the event?
WHERE	covers where the event will take place and where you are going to advertise your event.
WHEN	includes dates and times of the events and what needs to happen leading up to the event. When will you start advertising the event, and when will the event occur?
WHY	is the goals of your campaign. In your "why", focus on each goal and the event that will meet the goal. Include how you plan to meet the goal.
HOW	includes the methods you are using to advertise and coordinate your event. This step needs to describe what your resources, volunteers and staff members will need to do for this event.

You should be able to answer each of these questions about every item on your schedule to both prepare for and set up plans for what comes next.

Step 6: Find Partners

Partners make any awareness campaign easier, especially when the partner provides access to a larger audience. When you are running your campaign, you do not need to be and should not be alone in your efforts.

During any campaign, you can create strong partnerships with members of your community or other influential people who care about the issues and success of what you're wanting to accomplish.

Any time you meet with a potential partner, ask how you might help each other. Knowing the support you can provide to one another will increase your chances of building long-term relationships.

Step 7: Implement Action Plan

Throughout the campaign, your focus should be on accomplishing your goals, adjusting as necessary, and assessing the effect or impact. Be aware of your contracts or investments that are set in stone. Adjusting the way you accomplish your goals and changing your plans as the program evolves is okay. If you do change or remove an event, be sure to notify your audience as necessary in advance. With the proper planning and support, you should be able to adapt and measure your campaign accordingly.

When conducting a longer campaign, fatigue of education can set in. Your educational trainings may start to blur together if you have multiple events. It's important to take care of yourself during this time.

Flooding your community with information on a specific topic is always good, but make sure you have a good support in place or resources for the community members ahead of time. Be careful to not lose the ability to measure the impact of your campaign. Evaluate or survey your audience during or after each event to ensure you gain their thoughts and feedback. This is a great way to measure results of your event in an efficient manner

Step 8: Evaluate The Campaign

Measuring your goals continuously during the campaign will make evaluation easier. Collect feedback from your volunteers and partners as you put your campaign into action. When measuring the goals of your campaign, you want to look at each event as an individual piece, and then identify common trends through the entire campaign.

Reviewing the success of individual events can occur by collecting feedback at each and every event. Using individual surveys allow you to determine what programs work better than others, or what information might be helpful for community members. Measuring the entire campaign is a little more complicated. This will require you to collect information on things like: increased reporting of incidents, people utilizing support systems, and an overall decrease in incidents.

Step 9: Continue Ongoing Awareness

Prevention and awareness campaigns are most effective when they are part of an ongoing program. Although you are going to spend large amounts of time preparing for your specific campaign, you should also consider long-term prevention.

One of the best ways to carry-out your campaign during the year is to continue to host similar events or provide education to make awareness of the issue part of your community. Another option is to create new ways of engaging community members, keeping track of their information, and building a list of who might be willing to volunteer with future events.

2. Types of campaign evaluation

Campaign evaluations can be distinguished by their main ***purpose***. Note that there is an overlap with sample questions used in levels of monitoring to assess different aspects of the campaign.

Evaluation Type	**Purpose**	**Sample Questions**
Formative	Assesses the strengths and weaknesses of campaign materials and strategies, and their (likely) translation into practice before or during campaign implementation.	How does the campaign's target audience think about the issue? What messages work with what audiences? Who are the best messengers?

		What outcomes are being achieved?
Developmental (formative)	Helps campaigners design and develop innovative campaigning approaches and solutions, adapting to complex, uncertain and dynamic circumstances.	What are the vision and values that guide the campaigners? What do initial results reveal about what is working and not working?
Process (summative)	Examines campaign implementation, measuring effort and the direct outputs - what and how much was accomplished.	How many materials have been put out? What has been the campaign's reach? How many people have been reached?
Outcome (summative)	Measures effects and changes that result from the campaign. Assesses outcomes in the target audiences that come about as a result of campaign strategies and activities.	Has there been any affective change (beliefs, attitudes, social norms)? Has there been any behaviour-change? Have any policies changed?
Impact (summative)	Measures community-level change or longer-term results achieved as a result of the campaign's aggregate effects on individuals' behaviour and the sustainability of the behaviour. Attempts to determine whether the campaign caused the effects.	Has the behaviour-change resulted in its intended outcomes (e.g., lower cancer rates, less violence in schools) Has there been any systems-level change?

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Methods of evaluation (seminar)

Evaluation methods are the criteria for evaluating the success of a program or project

This tells the donor that you want to know if you've achieved your goals and objectives.

An evaluation plan tells many things…

- How you will know (the criteria you will use to evaluate success – tests, surveys, etc.)
- Methods that will be used to collect evaluation information
- Methods that will be used to analyze the evaluation information
- When you will conduct the evaluations (milestones, quarterly, annually)
- Describes who is going to evaluate (qualifications, credentials)

Evaluation is about being open to continuing feedback and adjusting your program(s) accordingly.

The three main types of evaluation methods are goal based, process based and outcomes based. Goal based evaluations measure if objectives have been achieved. Process based evaluations analyze strengths and weaknesses. Outcomes based evaluations examine broader impacts and often investigate what greater good was served as a result of the program or project.

Some things to consider when selecting an evaluation method are:

- What information is needed to make decisions?
- What information can feasibly be collected and analyzed?
- How accurate will the information be?
- Will the information be credible to top donors or management?

Potential Evaluation Methods:

Test

Pre and Post Test

Test Against Control Groups

Participation

Attendance

Completion

Certificates

Follow-On Tracking

Data Collection

Surveys

Questionnaires

Interviews

Checklists

Feedback forms

Financial Reports

Cost to budget
Cost per unit of service
On time on budget
Performance
Grades
Graduation
Job placement
Permits, inspections, certifications
Subjective (Qualitative)
Journals
Testimonials
Observations
Photographs
Clippings

Evaluation of National Awareness Day (Workshop)

The Workshop will be presented by the trainers.

Week 15. SUCCESS STORIES OF SOCIAL MARKETING

Success Stories of Social Marketing (lecture)

Plan:

1. Social Media Success Stories.
2. Standout social media marketing examples from 2019

1. Social Media Success Stories

Everyone's on social media. The number of social media users worldwide is 3.484 billion, up 9% year over year. And to put that into perspective, the world population is 7.7 billion.

According to Brandwatch:

1. Facebook boasts a whopping 2.375 billion daily users
2. YouTube has 1.9 billion users
3. Instagram has one billion users
4. LinkedIn has 610 million users
5. Twitter has 330 million users
6. Snapchat has 190 million users

That's an awful lot of social media users.

Almost every brand is on one or more social networks running marketing campaigns, which means that social media advertising spend in the U.S. alone is expected to reach $18.4 billion this year! And that number is likely to increase to $37.71 billion by 2020:

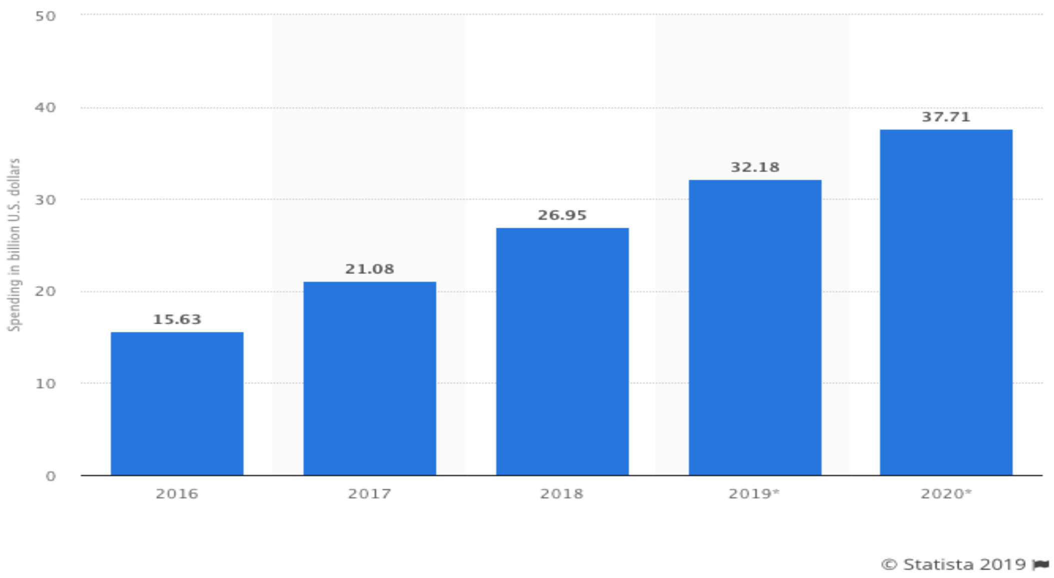

Fig.15.1. Social network advertising spending in the USA from 2016 to 2020 (in billion dollars)

Further, 73% of small businesses are investing in social media marketing with nearly all (95%) planning on increasing their marketing budgets in 2019.

The reason why social media is important to marketers is because it allows them to put their brand out there while implementing strategies, measuring outcomes and, ultimately, influencing their target audience to act in a certain manner. Very few brands, however, taste success.

While there's no one-size-fits-all formula to ensure a winning social media campaign, there are certainly lessons to be learned from brands who have managed to pull it off and are now reaping the benefits.

2. Standout social media marketing examples from 2019

1. User-Generated Content – Cupshe, TheEverygirl, Lush and Essie

User-generated content is all about sharing photos and posts that your customers have created for you. It makes your own content planning much easier and can play a large role in creating a compelling social strategy.

This is because user-generated content helps to really engage and build a community around a brand. People are happy and excited to share photos of their products if they think the business might see it, and especially if they might share it.

This helps your business's marketing strategy in a multitude of ways. First of all, you're not having to create as many assets, take as many photos or spend as much time on content creation when your customers are doing that for you. Second of all, you're interacting with your customers on a personal level when you share their photo on your business's feed.

2. Humor – MoonPie

We all love some good brand humor – and Twitter is the perfect place to find it. It's no secret that brands love to have some fun on the microblogging platform, and MoonPie has established itself as a fan favorite.

When it comes to creating a successful Twitter presence for your business, it's imperative to insert some personality into your tweeting. With only 280 characters per post, you have to give each one as much *oomph* as you've got.

3. Cross-Channel Marketing – Casper

Cross-channel marketing or multi-channel marketing is the practice of using multiple channels to reach an audience. Because not everyone uses every single platform, it's a good idea to have a presence on a few, and share some of the same content across the different networks.

Casper does a great job of this. But what I love most about their marketing is their *choice* of platforms.

4. Visuals – Square Sayings

You know the old adage: a picture is worth 1,000 words. This is why visuals are so important in any marketing strategy. You can talk about a product all day, but until you're able to put it in front of someone's eyes, it's not going to have nearly the same effect.

Square Sayings is a visual representation of one such brand. They've created promotional products like phone cases, hats, t-shirts and more, based on their beautiful beaded graphics.

5. Shopping on Instagram – See Jane Work

Year after year, social media platforms get more and more involved in selling products. This is, of course, great for business. The easier it becomes to sell products, the more revenue a company generates.

Instagram shopping is just one of the ways that your business can make it even easier for a customer to buy. You first need to make sure you've switched to a business Instagram account and connected your business's Facebook Page before enabling Instagram shopping. Once you've gotten your setup done, you should be tagging your products in every photo they appear.

6. Facebook Chatbot Marketing – TechCrunch

It was wildly exciting news in the digital marketing industry when Facebook announced it would be integrating chatbots into its Messenger feature.

At first, there were only a handful of cool chatbots to play with, but now there are so many different types of chatbots and different ways to use chatbot marketing within your strategy. TechCrunch, an online tech publication, uses theirs as a digital digest of sorts.

References:

1. Norman, J (2010, November) Boomers Joining Social Media at Record Rate
2. http://tinyurl.com/2wcmute.
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4. Facebook Drives US Social Network Ad Spending Past $3 Billion in 2011 (2011, January) http://tinyurl.com/67hljag
5. Rawaski, K. Oreo Facebook Fan Page Example in Detail (2011, January) http://tinyurl.com/3bvhc5j
6. Society of Digital Agencies (SoDA) 2011 Digital Marketing Outlook (2011, March) http://tinyurl.com/3d9cyws
7. The Fortune 500 and Social Media, University of Massachusetts Dartmouth Center for Marketing Research.(2010). http://www.umassd.edu/cmr/
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Discussion (seminar)

Critical Appraisal (Workshop)

The Workshop will be presented by the trainers.