Social Marketing in Action: Cases from Around the World

Teaching Guide Collections

Editors:
Debra Z. Basil, Professor of Marketing, Dhillon School of Business, University of Lethbridge, Lethbridge, Canada. Email: debra.basil@uleth.ca.

Gonzalo Diaz-Meneses, Professor, Faculty of Economy, Management, and Tourism, University of Las Palmas de Gran Canaria, The Canary Islands, Spain. E-mail: gonzalo.diazmeneses@ulpgc.es

Michael D. Basil, Professor of Marketing, Dhillon School of Business, University of Lethbridge, Lethbridge, Canada. E-mail: michael.basil@uleth.ca

Dedications

We dedicate this teaching guide collection to our authors.

We greatly appreciate their hard work and responsiveness. We asked much of them, including multiple rounds of review and revision. Their prompt attention to each request made it possible to complete this book on schedule. Without their contributions, there would be no book and no teaching guide collection.

With gratitude, Debra Basil, Gonzalo Díaz Meneses, and Michael Basil, Editors.

Preface

This collection of teaching guides was written to accompany the book *Social Marketing in Action: Cases from Around the World*. The book was written for those interested in creating social change for the greater good. In the book we provide a wide selection of social marketing cases from which we can learn and teach. The book is intended for both academic and practitioner use. Part I of the book offers a brief yet comprehensive review of social marketing. This provides the reader with the background in social change and marketing necessary to read and analyze the subsequent cases. Parts II through V of the book offer a total of 24 social marketing cases, from a variety of countries, addressing many different issues. The cases, composing chapters 6 through 29 of the book, are divided into the categories of social welfare, health, the environment, and education.

This teaching guide collection was written to support educators using the book in the classroom. The following material contains a separate teaching guide for each of the 24 cases in the book. Each teaching guide contains answers to the discussion questions listed at the end of their respective case in the book. In addition, many of the teaching guides also include a summary of key issues in the case, in-class activities, out-of-class activities, and additional resources.

Acknowledgements

Many people helped us bring this book and teaching guide collection to fruition. First and foremost, we wish to thank our wonderful slate of authors. Our contributing authors obviously provided the bulk of the material for this book. In addition to providing the content, they were diligent, timely, and conscientious, helping to make this effort run smoothly.

The initial impetus for this book was a Public Outreach Grant from the Social Sciences and Humanities Research Council of Canada (SSHRC). This funding helped those of us in the Centre for Socially Responsible Marketing at the University of Lethbridge to offer a community practitioner workshop that occurred in conjunction with our SMART (Social Marketing Advances in Research and Theory) conference in Vancouver in 2012. Specifically, we wish to acknowledge our colleagues Tanya Drollinger, Walter Wymer, and Sameer Deshpande who all played important roles in the SMART conference.

We also thank our many former Master of Science students who provided support in various ways including spurring us to think more deeply about social marketing. In particular, former Master of Science students Katherine Lafreniere, Janelle Marietta-Vasquez, and Pamela Gonzalez were very helpful in the creation of this book, and their efforts are greatly appreciated. In addition, we thank our copy editor Aerin Caley, who was extremely positive and accommodating throughout this process.

The University of Lethbridge (U of L) provided financial support in two ways. The first was by funding one of our co-editors, Gonzalo Díaz Meneses, to serve as a Burns Research Chair, which greatly facilitated our collaboration on this project. The second form of U of L funding was offered by the Office of the Vice President (Research) Strategic Opportunities Fund to provide copy editing assistance. We are grateful for this support.

We would also like to thank Springer publishers for their faith in this project.

*This effort was partially supported b*y the European Union's Horizon 2020 research and innovation program under grant agreement No 727474 entitled improving digital health literacy in Europe.

This research was supported by the Social Sciences and Humanities Research Council of Canada

*This effort was partially supported b*y the European Union's Horizon 2020 research and innovation program under grant agreement No 727474 entitled improving digital health literacy in Europe.
This research was supported by the Social Sciences and Humanities Research Council of Canada

Social Sciences and Humanities Research Council of Canada Conseil de recherches en sciences humaines du Canada Canada

About this Book

This teaching guide collection corresponds to Parts II, III, IV, and V of the book *Social Marketing in Action: Cases from Around the World*, which includes 24 social marketing cases. The cases are placed within the categories of social welfare, health, environment, and education within the book. There are, however, many other ways that they could be categorized, depending on your interests. The following tables offer some alternative schemes for grouping the cases including geographic location (Table 1) and theoretical frameworks (Table 2). Additionally, the final table indicates specific cases we think do a particularly good job of demonstrating particular program components (Table 3).

We hope that you find this teaching guide collection to be a useful accompaniment to the book. We welcome any comments or suggestions. Please contact Debra Basil at debra.basil@uleth.ca if you have suggestions for future versions of the book or this teaching guide collection.

CHAPTER NUMBER	BROAD TOPIC AREA				GEOGRAPHIC LOCATION					SPECIFIC TOPICS WITH MULTIPLE CASES	
	Social Welfare	**Health**	**Environment**	**Education**	**North America**	**Europe/UK**	**India**	**Australia**	**Other Locations**	**Hand Washing**	**Litter**
6	X							X			
7	X					X					
8	X							X			
9	X					X					
10	X				X						
11	X					X					
12	X				X						
13		X					X			X	
14		X				X					
15		X					X				
16		X				X					
17		X					X			X	
18		X					X				
19		X							X	X	
20			X		X						
21			X							X	
22			X		X						X
23			X		X						X
24			X		X						X
25			X					X			
26				X		X					X
27				X		X					
28				X			X				
29				X		X					

Table 1 Cases by Topic Areas and Geographic Locations

CHAPTER NUMBER	THEORIES APPLIED					
	Exchange Theory	**Diffusion of Innovations**	**Self-Efficacy**	**Theory of Planned Behavior**	**Trans-theoretical Model**	**Community Readiness**
6				x		
7						X
8	X					
9	X	X				
10						
11	X			X		
12	X					
13						
14			X			
15	X				X	
16						
17		X		X		
18						
19	X		X			
20			X			
21						
22						
23		X			X	
24						
25						
26						X
27						X
28						
29						X

Table 2 Cases by Theories Applied

CHAPTER NUMBER	EXEMPLARS OF SPECIFIC CASE COMPONENTS											
	Understanding the Environment	**SWOT**	**Segmenting and Targeting**	**Formative Research**	**Barriers and Benefits**	**Objectives**	**Product**	**Price**	**Place**	**Promotion**	**Public/Private Partnership**	**Evaluation**
6	X	X			X					X		
7												
8												
9												
10	X											
11								X				
12											X	
13											X	
14				X								
15								X	X			
16												
17										X	X	
18												
19							X			X		X
20			X		X							
21			X									
22												
23			X									X
24						X			X			X
25						X						
26		X										
27				X			X					
28				X			X				X	
29							X					

Table 3 Exemplars for Specific Case Components

Table of Contents

Teaching Guides for Social Welfare Cases

Chapter 6 **Fun Ways to Engage With Rail Safety Through Dumb Ways to Die Campaign**

Jennifer Algie and Nicole Mead

Discussion Questions

Question 1
Should other social causes, such as reducing mobile phone use when driving or encouraging children to wear a bike helmet, use a similar approach to promote their cause? Why/Why not?

Answer 1
The DWTD campaign could easily be adapted to feature other safety behaviors. That is, the same format could be used, with similar characters and using the same song, but with different endings to the PSA, such as examples of the dangers of not wearing a bike helmet or texting when driving. This strategy, however, has not yet been pursued by the ad agency or other safety authorities.

The advantage of using the same DWTD theme would be familiarity, however, at the same time, the approach would no longer be novel and innovative which are largely the reasons for the campaign’s success. Perhaps, given some time, with new generations who have not seen the campaign previously, targeting different behaviors would be possible.

Dr. Ioni Lewis, a researcher at the CARRS-Q has called for new approaches to promoting road safety. Her publications on this subject include:

Lewis IM, Watson BC, White KM, Tay RS, (2007) Promoting Public Health Messages: Should We Move Beyond Fear-Evoking Appeals in Road Safety, Qualitative Health Research p 61-74.

Other social, environmental, health, and community-involvement behaviors are also seeking alternative ways of connecting with their target audiences and considering options beyond the traditional use of threat/fear appeals. Examples include:

Reduce your juice energy conservation initiative http://reduceyourjuice.com.au/

Speed "Enjoy The Ride" Road Safety Council Western Australia.

Jennifer Algie, University of Wollongong, Wollongong, Australia. E-mail: jeni@uow.edu.au
Nicole Mead, University of Wollongong, Wollongong, Australia

Question 2
If you were the Product Manager for Metro Trains, and wanted to create a PSA campaign from scratch, what would be some campaign objectives you would consider important? Think about how you would identify the problem to be solved (and what data sources could be used and remember to frame each objective using SMART Objectives framework).

Answer 1
SMART Framework (https://www.smartinsights.com/goal-setting-evaluation/goals-kpis/define-smart-marketing-objectives/)

Specific – Is the detail in the information sufficient to pinpoint problems or opportunities? Is the objective sufficiently detailed to measure real-world problems and opportunities?
Measurable – Can a quantitative or qualitative attribute be applied to create a metric?
Actionable – Can the information be used to improve performance? If the objective doesn't change behavior in staff to help them improve performance, there is little point in it!
Relevant – Can the information be applied to the specific problem faced by the marketer?
Time-bound – Can objectives be set for different time periods as targets to review against?

Ultimately, organizations engage in CSR activities/ PSA style messaging for two reasons:

to make an impact in their chosen areas of interest, and
to garner goodwill / positive sentiment about their brand from the activities undertaken.

For Metro trains they would ultimately want to reduce the number of incidents causing physical harm to people from their trains, and also, have people think they are doing something good for the community. One of the reasons they may want to reduce train accidents is to reduce the administrative time it takes their staff attending to these matters which diverts their attention away from their core business of providing transport services.
To quantify a reduction in the number of incidents, Metro Trains could either source data from their own proprietary systems or from the Office of the National Rail Safety, who publish safety statistics. Comparing the accident rate for 12–24 months prior to the advertisement to the 12–24 month period after the campaign ran could provide an insight into the impact of the communication and messaging (excluding other factors).

It is important to select metrics that can be directly compared between the periods of pre- and post-campaign. Example Objective: Reduce the number of recorded accidents by people aged 13–25 by 10% (from X to Y) over the 12 months following the campaign.

Question 3
Do you feel that there are ethical issues with treating safety around trains in a humorous/fun way?

Answer 3
There are some ethical dilemmas raised by this particular campaign.

First, the use of funny cartoon characters in the campaign attracts younger viewers (young children aged 3 to 12 years of age) who, because of their stage of cognitive development, learn and potentially copy unsafe behaviors from this campaign (e.g., sticking a fork in a toaster). However, at the same time, if the "safety around trains" message becomes ingrained at a young age, through the DWTD campaign and on-line games, this is a positive outcome.

Second, the images depicted in the DWTD campaign may provide ideas for people who are experiencing mental health issues. Russia censored by the clip due to the "promotion of suicide" and possible implications for people with mental illness (http://www.best-marketing.eu/case-study-metro-trains-dumb-ways-to-die/).

Question 4
Ask your friends, family and/or work colleagues if they can they name the organization promoting the DWTD message AND/OR the behavior that is recommended at the end of the song? Compare your results within your class and discuss if there is a risk of the creativity of the campaign overpowering the message from Metro Trains Melbourne?

Answer 4
First, note and discuss the approximate age of your research participants to determine if they would have been part of the intended audience of the DWTD campaign. Discuss whether your friends/family had heard of, or seen, the campaign.

Second, tally the number of participants who were able to identify the source and message of the campaign. What you have tested for is the ability of people to recall the source and message. Recall figures will always be lower than recognition figures for advertising campaigns.

There is a risk when using humor in advertising to gain attention that the message will be lost in the overpowering entertainment value of the ad.

Traditional TV advertising and radio ads are much shorter in duration than the DWTD PSA. There is more content to be processed in the 3.05-minute YouTube video, with a variety of scenes being shown throughout the clip. However, towards the end of the PSA, the rail safety themed scenes are numerous in comparison to the other scenarios depicted in the PSA, therefore this repetition of instances of rail safety may provide viewers with a means for connecting the DWTD campaign with rail safety.

Question 5
Find four successful viral campaigns and determine if they have any factors in common. Could these factors be applied to other social and health behaviors (for example, reducing mobile phone use when driving or encouraging people to wear a bike helmet)?

Answer 5
Examples of other viral marketing campaigns can be found at:-
https://www.branded3.com/blog/the-top-10-viral-marketing-campaigns-of-all-time/

Among these examples are:
Old Spice https://youtu.be/owGykVbfgUE
Air New Zealand an Expected Briefing (https://youtu.be/cBlRbrB_Gnc)
Dove Real Beauty Sketches – April 2013 (https://youtu.be/XpaOjMXyJGk)
Always #LikeAGirl – June 2014 - (https://youtu.be/XjJQBjWYDTs)

No-one Thinks Big of You (Pinkie) – 2007 – This ad, created by the Roads and Traffic Authority (formerly referred to as the 'RTA' and now known as the 'RMS'—Roads and Maritime Services) of New South Wales, Australia to target youth speeding on the roads, while not defined as a “viral success” has had long term impacts on driving culture and references. It used a similar approach that embraced peer pressure and questioned the nature of “what is cool?” - https://www.youtube.com/watch?v=TvC6RryUn0Y

Question 5
What elements do viral campaigns share?

Answer 5
Some of the factors that contribute to viral success according to Doz.com (2017) include authenticity, creativity, and adaptability. (http://www.doz.com/media/dumb-ways-to-die)

Foong (2014) cites emotional appeal, shareworthy content, timing, design, and distribution as key success factors for Viral Marketing Success.

These factors could be used when generating ideas for other safety behaviors or social marketing campaigns.

Question 6
What are some considerations that social campaigns can learn from viral / corporate marketing?

Answer 6
This article provides some useful insights into lessons that social marketers can learn from corporate marketing campaigns:

http://www.phrp.com.au/issues/march-2015-volume-25-issue-2/social-media-campaigns-make-difference-can-public-health-learn-corporate-sector-social-change-marketers/

Question 7
Social marketing should be more than social advertising—it should be a comprehensive program beyond the promotion of a message. Do you feel that the Dumb Ways to Die campaign is an example of social marketing or social advertising? Do you have suggestions for further improving the campaign?

Answer 7
Some social marketing experts would most likely staunchly argue that the DWTD campaign was largely social advertising—as it was predominantly about creating a message for a downstream audience that relied upon the individual making changes to their own behavior around trains. The Canadian “social farting” campaign has also been criticized for being social advertising, although this campaign did involve a Facebook site to support the behavior change.

The additional components of asking for pledges to be safe around trains and the gamification of the concept do broaden the campaign beyond simply social advertising. However, these steps do not 100% ensure behavior change.

Most social marketing campaigns require a more comprehensive program, in regard to coverage of the Marketing “Ps”, however the DWTD could be an exception to this general rule given the number of views that the campaign attracted.

Following the DWTD campaign, in Victoria, a state of Australia, there has been the “level crossings” project which is a more upstream approach to tackling the problem of safety around trains.

Chapter 7 The Second Life of Food: When Social Marketing Bridges Solidarity and Waste Prevention, The Case of the Italian Food Bank

Ksenia Silchenko and Federica Simonetti

Introduction

The instructor might have the class break up into groups and have them answer individual questions autonomously. Then, each group would be asked to share their solution with the class, and the class would discuss the pros and cons of the proposed approach.

Alternatively, the group work can be arranged around the specificity of the Banco Alimentare's case. In this way, the class could be divided into groups that each consists of two sub-groups: one that works with the food industry and targets recovery of surplus food that is otherwise destined to go to waste, and another that targets the volunteers and, more generally, tries to increase public awareness about the Food Bank's causes. Each sub-group will first address the discussion questions individually from the perspective of their primary target and then will work with another sub-group to adjust the proposed solutions in line with both objectives and targets.

Discussion Questions

Question 1
What approaches might Banco Alimentare use to further grow the amount of recovered and redistributed food?

> Answer 1
> Further expand the range of recovered and redistributed products by partnering with more food business operators at all stages of the supply chain from agriculture and primary production to food processing companies, large distribution centers, retail, and foodservice companies.
> Improve the logistics of the network by, for example, increasing the number and/or capacities of warehouses in various regions and locations, optimizing the travel times and transported volumes, investing in improved equipment, etc.
> Identify and target more partners for the Siticibo meal recovery and redistribution program. The current focus on company, school, and hospital canteens, could be supplemented with further partnership with other food services, such as catering businesses, all-you-can-eat restaurants, cooking shows, and such.
> Increase the number of collection days beyond one-day Colletta Alimentare [In 2014, Banco Alimentare launched an "extraordinary" collection day in June, which collected as much as a half (4.770 tons) of the better-established annual collection day (9.201 tons), showing the potential to arrange more than one national collection day a year]. Other, more local, collection occasions in companies, schools, universities, public institutions, etc. can be organized more frequently.

Ksenia Silchenko, Department of Political Sciences, Communication and International Relations,, University of Macerata, Italy. E-mail: k.silchenko@unimc.it
Federica Simonetti, Department of Political Sciences, Communication and International Relations, University of Macerata (Italy). E-mail: f.simonetti4@unimc.it
Giacomo Gistri, Department of Political Sciences, Communication and International Relations, University of Macerata, Italy. E-mail: giacomo.gistri@unimc.it

Explore options to expand into household waste recovery, currently not covered by the Italian Food Bank operations due to legal, safety, and logistics restrictions.

Question 2
In what other ways (beyond the amount of recovered and redistributed food) can Banco Alimentare deliver on its social marketing objectives?

Answer 2
Beyond increasing the quantity of food, Banco Alimentare could focus on other performance metrics, such as increase in the (nutritional) quality and diversity of the collected food. By tracking not only the kilograms of food saved from waste and turned into meals, but also the nutritional profile of the redistributed foods, Banco Alimentare will be able to manage the nutritional balance by targeting more specific food industry partners that would help fill in the nutritional, not only quantitative, gaps.

Develop stronger relationships with educational institutions such as schools and universities with the aim of helping the younger generations to become better educated about the issues of food poverty and food waste and thus invest in the future of delivering on Banco Alimentare's goals and values. [The Food Banks in Italy already have positive experience of engaging with children and young adults, including the teams of volunteer educators that give engaging lectures in schools ("Banco Scuola") and an annual motivational tour by a TV personality, Luca Abete ("#NonCiFermaNessuno", also functions as ongoing sociological research into the younger generation's attitudes), as well as some local agreements with certain schools allowing students to earn extra credits in exchange for volunteering with the Food Banks].

Question 3
What can Banco Alimentare do to further increase its volunteer base?

Answer 3
Strengthen the presence on social media as a platform for user engagement leading to their conversion into volunteers.

Further exploit collection day occasions (both the national Colletta Alimentare and local collection days in companies, schools, etc.) in order to recruit volunteers. Such occasions are especially fruitful as those who participate can also learn more about the problem of food poverty, face the experience of helping others, and therefore increase their commitment to donation of food, time, and economic resources.

Question 4
In what other, currently underexploited ways, can Banco Alimentare utilize its nationwide network of food banks?

Answer 4
Provided there is feasibility from the regulatory and safety standpoints, the regional Food Bank hubs could provide some space for community-run initiatives, where private persons could leave their household food surpluses for those who are willing to pick them up on an ad hoc basis. The role of the Food Bank network would be to merely "rent out" (or rather "donate") the physical storage space (shelves and/or fridges) for the public's occasional use by self-driven volunteers, where they can reach people in need.

Question 5
In what ways can Banco Alimentare capitalize more on its social media presence?

Answer 5
The Italian Food Bank could build on its current social media presence on Facebook and use it in a strategic way as a connection-building tool that helps reach potential donors (of resources, time, and funds).
By increasing the presence and the intensity of activity on its owned various own edit's own media accounts (websites, social media pages), Banco Alimentare will also improve its presence and impact on the earned media (newspaper articles, TV exposure, etc.) and paid media bought by its partners in food industry (advertising, events, promotional campaigns).

Social media presence can be further diversified by channels and their respective strengths and audiences: for instance, Instagram can be used for contests to increase the engagement in the younger user groups or for visual communication (e.g., piles of food destined to waste, tears of gratitude in the eyes of the beneficiaries) to enhance the awareness about the food problems; Linkedin to increase and strengthen relations with donor companies, etc.

Question 6
What other initiatives can Banco Alimentare implement to enhance its own brand?

Answer 6
Grow the number of occasions that allow for wider exposure of the Banco Alimentare brand (e.g., Expo and other (inter)national high-exposure events, TV ad campaigns, etc.)
Introduce some merchandising (e.g., t-shirts or aprons with the logo, gadgets for children, pens, key rings, etc.) to increase the involvement of volunteers and the communicative impact. The current symbol of recognition of the annual national collection day volunteers is the plastic bag styled as a vest, which is certainly lower cost and fits with the values promoted by the event, but it is also a disposable item that will not live beyond the day and therefore limits the communicative impact.

The brand identity can go beyond the visual aspect (the logo) and expand into verbal (payoff, slogan, etc.) and physical (associated persona or spokesperson) brand elements.

Question 7
Which slogan or other verbal cues can be added to support the visual identity of Banco Alimentare?

Answer 7
A memorable verbal payoff should bridge the two social causes that Banco Alimentare pursues. An example could be "The second life of food" [Previous attempts to introduce slogans were sporadic and included such payoffs as “Made of people, working for people”, “It's better to donate”, “Sharing the needs in order to share the sense of life”, none of them really catching on].

Key Issues for Focus

One of the issues that the Italian Food Bank is currently facing is an increase in public awareness, favorable change in the legislative climate and, as a result, a sharp increase in the number of non-profit and profit operators essentially doing the same food recovery and redistribution work as Banco Alimentare does. Though in marketing terms, such a situation indicates growth in competition (in operative terms, competition for resources and donors' attention), as a non-profit organization, Banco Alimentare refuses to think of it in terms of competition (Weinberg & Ritchie, 1999). Instead, they think of the other organizations and social marketers as their allies in the mission of reducing food waste and alleviating food poverty.

References

Weinberg, C. B., & Ritchie, R. J. B. (1999). Cooperation, Competition and Social Marketing. Social Marketing Quarterly, 5(3), 117–126. http://doi.org/10.1080/15245004.1999.9961075

Chapter 8 The Bank of Cancer Research: A Concept to Provide Sustainable Funding for Cancer Research

Nicholas Shipley, Peter Vitartas, Aaron March

Discussion Questions

Question 1
What is your view on the Bank of Cancer Research concept?

Answer 1
The BCR concept presents a single-cause entity to appeal to a “do-good” consumer motivational segment. The concept aims to capitalize on a social cause and on long-running consumer discontent in relation to the provision of banking services.

In this question students are asked to reflect on the concept and relate it to their personal values. A number of questions could be posed to consider the social marketing concept including;

What are the core values, needs, and wants that the BCR concept appeals to?
How else do consumers currently seek to satisfy these core needs? What is the range of direct and indirect competing products and services?
To what extent are these needs and wants not currently being met and are they a strong enough basis for a complete banking entity? What is the gap in the market?
Is the single-cause of cancer research going to be an adequate basis to gain a sustainable position in the market for provision of banking services?

BCR as a concept is single-minded in its vision to create a banking service to support a cause. Given the complexity of funding the enterprise and breaking into a highly competitive financial services market, it needs to evaluate alternative business models and/or channel partnerships as a means of supporting its cause that present fewer entry barriers whilst adhering to its mission and values.

Question 2
What would you do to (1) contact signatories to the Giving Pledge and (2) how would you get their attention?

Answer 2
In this question students should be encouraged to brainstorm the approaches they would take in reaching the target market. They should be encouraged to consider the nature of the market—in particular the age, motivations, and attitudes of the members to the Giving Pledge. In terms of contacting them they should think about the mediums they would use and whether they undertake a mass or targeted campaign. They should also reflect on how they would market themselves and the message they would focus on.

Peter Vitartas, La Trobe Business School, Bundoora, Australia, E-mail: p.vitartas@latrobe.edu.au
Nicholas Shipley, La Trobe Business School, Bundoora, Australia
Aaron March, Bank of Cancer Research, E-Mail: amarch@bankofcancerresearch.com

Question 3
What other products could be used for a purpose entity? What are the important elements of a purpose entity?

Answer 3
The concept of a purpose entity is consistent with “cause-related marketing” (Varadarajan & Menon, 1988). Students might be encouraged to investigate these concepts through their own research and look at other models that have been used. Consideration can be given to the type of products and services that might have a natural synergy with a particular purpose. What product attributes and characteristics might support the purpose entity? Which consumer segments are most attractive to purpose entity marketers and under what circumstances might a product not be suitable for a purpose entity?

Question 4
How are competitors in the banking industry likely to respond to the BCR if established?

Answer 4
Numerous general competitive issues arise. For example, the proposed model for BCR involves the acquisition of an existing bank (or potential competitor) to launch a new social business concept. How realistic is it to expect the shareholders to transfer their equity in an ongoing bank in order to support an as yet unproven concept? At this level, the competitive challenge will be in positioning the BCR proposition to shareholders and influencing the choice between commercial vs. socially motivated investments. What alternative entry strategies for the BCR concept might be considered to avoid the possible conflicts of interest this presents?

If the BCR is successful in its campaign to attract philanthropic funding and can acquire an existing bank, what competitive issues will be presented in relation to branding and repositioning the existing entity? How would an ongoing bank be repositioned and what challenges and opportunities might this present?

At an organizational level, is there a David and Goliath issue to contend? Whether the BCR concept is realized through acquisition or by other means, is it likely to achieve the scale needed to compete as a me-too provider? What might be needed to establish the BCR as a viable niche competitor?

Given that the BCR’s point of differentiation (the use of profits) is somewhat single-minded, it will need to give careful thought to how it will deliver value at the level of its core and actual products. Which of the seven P’s of the services marketing mix will present BCR with the greatest potential to build and defend a market position? Which will present the greatest challenge?

An alternative point of view could also be considered and discussed with students. The mission statement of BCR is to cure cancer.
Any activity by a competitor to the BCR would only be considered a threat if other causes entered the banking market with a similar strategy or their position in other markets, say insurance, blocked BCR’s growth into that market.

If competitors operated a similar strategy to raise funds for cancer research in a different market say telecommunication, this could lead to an increase in cancer research funding which brings BCR closer to achieving their goal. So, in this circumstance, the adoption of the model by competitors is an opportunity.

Further, if a competitor named BCR2, with a similar model entered the banking market with the aim of curing cancer and by them entering the market resulted in a greater share of banking profits being used to fund cancer research. This would also be viewed as an opportunity (especially if they contributed to open source research).

The important point here is that the goal is to cure cancer as opposed to maximizing the profits of one entity at the expense of achieving the goal.

Question 5
Aaron believes that proof-of-concept for the Bank of Cancer research and evidence of consumer's propensity to switch services is required in order to attract philanthropic funding to purchase of an existing bank. What alternative means of establishing demand for BCR services could Aaron use? What customer behavioral challenges will BCR face in attracting customers?

Answer 5
To some extent this question presents a chicken-and-egg issue. The BCR concept needs to attract both philanthropic funding as well as business and retail customers. In what order should this be done?

At the consumer level, Aaron is using a variety of social media to build awareness of the concept, which he hopes will ultimately generate an indication of the likely reaction of customers to the concept and demand for the BCR's services. To date his aim has been to use this as evidence of market need to attract philanthropic funding. A number of questions arise; how appropriate is the use of social media as a means of testing the business concept of the BCR?; what level of confidence does this kind of feedback data provide potential investors/donors in the business-case?; how will Aaron filter out biases in data that may arise from the use of social media; what other approaches might he use to prove the concept of the BCR and provide reliable evidence that consumers will be prepared to switch from their current back to the BCR?

In terms of the general business feasibility of the BCR, marketers will need to understand consumer's barriers to switching services. When asked, many consumers respond positively to the idea of supporting socially responsible businesses but in practice may not be sufficiently involved or motivated to actually switch providers. Banking services are also notoriously "sticky" ones in which the most valuable customers often find it difficult to disentangle themselves and move to new providers. Often these difficulties are because of the sheer bureaucratic complexity of changing service providers and sometimes because of the lack of 'WIFM' (what's-in-it-for-me) in terms of a demonstrable increase in value to the end-users (such as reduced service fees, interest rates, etc.). Assuming the BCR's profit usage position is sufficient to attract the interest and attitude of potential customers, what other supporting tactics will be needed to create customer conversions?

Question 6
What are the challenges of using VALS typologies for targeting purposes? How will BCR be able to use these to accurately forecast the size of the target audience and consumer demand?

Answer 6
This question allows students to explore the concept of VALS typologies. They might also be directed to alternative typologies and forms of segmentation. The case discusses the use of several segmentation bases such as demographic, geographic, and VALS typologies, suggesting that the "Believers" segment as an ideal target for the BCR.

What are the dimensions of a Believer for segmentation purposes? For whom will the eradication of cancer be sufficient a trigger to motivate a change in banking services and how can this be proven to the extent that it will support the business case for the BCR?

Since 1 in 6 people die from cancer, those indirectly affected (such as the family of individuals contracting cancer) may fit with the profile of a Believer for the BCR. What marketing communications issues does this present in terms of the identification of buying/switching motivations, message development, and media selection? What ethical challenges are presented in leveraging these motivations?

In-Class Activities

The following class discussion questions can be used to encourage students to think about the broader strategy and purpose proposed for the Bank of Cancer Research (BCR) and as a means of foregrounding deeper analysis required of the short-answer questions and advanced activity. Initially, students may be tempted to launch into thinking about solutions to the BCR marketing program without first questioning the extent of the need for, and nature of, funding requirements:

What aspects of cancer research are most needed?

What data is required to evidence this need?

Can we use the term cancer research as an umbrella term to encompass all activity in the field?

What are the potential complications that emerge from this?

From an organizational perspective, how can we reconcile the stated mission with the proposed solution—buying an existing bank?

Why is the acquisition of a bank the best solution to the mission?

What challenges might this present?

What alternative approaches might be considered to achieve the stated mission?

The proposed approach also indicates that profits would be distributed by the BCR to the research community. What issues arise regarding this?

Who determines how funding is to be distributed and prioritized?

How is BCR funding harmonized with current research efforts and funding sources?

What potential conflicts of interest might exist with for-profit research such as that conducted by pharmaceutical companies?

Finally, what issues of trust might be presented in relation to the identity, capability, and mission of BCR? What should be done to establish trust?

What would potential donors need assurance for in relation to the identity of BCR?

What questions might consumers of banking services ask to satisfy themselves that BCR is a trustworthy organization?

Out-of-Class Activities

The following question can be used as an extension exercise or for a term paper in a number of ways including, for example:

The conduct of a marketing audit;

Analyzing and making recommendations about the likely attributes of a services marketing mix (7 P’s) for the BCR.

Based upon available information and your research, undertake a review of the proposed concept for the Bank of Cancer Research and prepare a critique from a new-product launch perspective. This should take into consideration the broader environment for the provision of banking / financial services. Present your thoughts around the headings of a marketing plan together with recommendations for each key element of the marketing program.

Chapter 9 VCW for Social Impact in a Developing Country: Personal Development and Entrepreneurship in a Leadership Academy

Carlos Reis-Marques, Luís Filipe Lages and Valentine Vix Caminati

Group 1:

Discussion Questions
While building on this case-study, please answer the following questions:

Question 1
What are the challenges faced when applying the VCW to a non-profit and/or social organization's project? How can they be overcome?

Answer 1
The most common problem faced by a social organization applying the VCW framework is the restricted amount of financial and human resources to address social challenges. Below we present several recommendations to overcome this problem.
Involve the KDMs and stakeholders in key moments of the VCW process. In this way the VCW is much more likely to succeed and resources can be saved.
Plan the amount of resources allocated to the 3Ms (manpower, minute, money) right at the beginning of the VCW. Determine clear deadlines customized to the pace of the project's needs.
Involve different people in the different stages, so it does not take up too much of each person's time and effort.
Develop partnerships with universities and invite students to apply the VCW within the context of their courses.
Start by applying the Value Creation Radar (VCR), a faster and simplified version of the VCW, which uses fewer tools and requires fewer resources for each of the five VCW phases.
Use a team of VCW experts or VCW consultants to provide specific instructions based on their experience of past projects. In this way the organization might spend less time and money in order to reach a solution in less time. However, do not to rely entirely on the VCW team. Ensure that the key decision makers (KDMs), employees and critical partners/stakeholders are involved.

Another frequent challenge is that social problems are not clearly defined. It is very important to have a deeper understanding of the root causes of the social context in order to come up with the best solution in an efficient manner. Therefore, the VCW team should conduct research in the first phase of the VCW cycle and understand the root causes of the problem.

Carlos Reis-Marques, Nova IMS, Lisbon, Portugal. e-mail: crmarques@novaims.unl.pt
Luís Filipe Lages, VCW Center, Nova School of Business and Economics, Lisbon, Portugal
e-mail: lflages@novasbe.pt
Valentine Vix Caminati, ROFF Consultancy, Lisbon, Portugal. e-mail: valentine.vixcaminati@gmail.com

Third, often people are not aware about the VCW. In order to address this issue the VCW has also developed customized workshops to introduce and disseminate the VCW. After attending one of these “VCW Trial” workshops, Alina Angielczyk, Managing Director of Hapag-Lloyd Polsk mentioned:
…the Value Creation Wheel is a quite condensed and structured tool to help with the decision-making process. The wide range of applications where it can be used made it even more fun and boosted the benefits from a personal perspective.
When local teams desire to implement the VCW by themselves, they often have difficulties in choosing the right tools to assist the VCW method across its five phases. This challenge might be overcome through customized training and reading of VCW supporting material.

Finally, uncertainty and cross-cultural dimensions play major roles in developing countries. There can be difficulties to understanding the socio-cultural environment and the embedded constraints. To overcome these challenges the VCW team has to involve local and social experts, define KPIs adapted to specific objectives, give emphasis to the preparation (pre-action phase) of the VCW implementation, and should study the socio-cultural aspects while paying attention to a wide range of details (e.g., local religion, personal beliefs, political context, social pressure, historical heritage).

Question 2
How important is the establishment of KPIs for social projects? Which KPIs would you propose to assess this VCW project in Mozambique?

Answer 2
The outcomes of the VCW application are measured through the assessment of determined KPIs. The KPIs need to be defined at the beginning of the project, when the challenge/ problem is identified. Reaching the established KPIs means that the project was successful and an adequate solution was found. A critical challenge for social projects is the frequent use of non-financial metrics as KPIs because they are harder to evaluate and to monitor.

For the Leadership Academy project, KPIs were defined at two levels:

First level. Impact on the participants’ lives:
a) success of the sessions in Nampula—evaluation of the knowledge gained by the participants led to all participants being able to design a prototype and a Business Model Canvas;
b) effect of the sessions—participants’ ability to apply the concepts learned in the training (how much time they needed to apply the solution designed) led to being evaluated during the next phase of the project (Lisbon).

Second level. Impact on the organization:
As mentioned by Kotler and Keller (2012, 662), social marketing organizations should evaluate program success using criteria such as “incidence of adoption, speed of adoption, continuance of adoption, low cost per unit of adoption, and absence of counterproductive consequences.” According to the case study, the VCW had a positive impact for Girl Move’s organization and Girl Move has already invited the VCW team for a third edition, to be launched in 2019. The positive impact is also reflected in:

a) participants' satisfaction—did they find that the VCW was one of the most important features within Girl Move's program? See evaluation (positive comments and recommendation);
b) value added by the VCW to the project—did the VCW increase the value of Girl Move's project, compared to the previous Leadership Academy? See opinion of a participant in both previous and current Leadership Academy (she wishes that all girls could benefit from the VCW application).

Question 3
A major challenge for leaders has to do with managing confidential issues and simultaneously benefiting from co-creation inputs that lead to creative ideas/solutions. Which recommendations would you provide to address this challenge?

Answer 3
A possibility is for VCW experts or VCW consultants to provide training sessions inside leadership academies and/or organizations, in order to teach the VCW and help people to run the tool. The promotion of a "no bad ideas" environment, where everyone expresses their ideas without censorship, is critical. After learning the VCW tool, individuals can later use it to solve their own challenges as well as those inside their departments/organizations to address confidential challenges/problems.
Additionally, together with the VCW team coordinating the project, the KDMs can decide about:
which data/information (if any) has to be protected by a Non-disclosure Agreement (NDA),
which data/information stakeholders might be given access to,
which people are in a better position to deal with the challenge in order to reach to the solution(s),
which stakeholders should be involved in the different phases of the VCW.

Question 4
Following the VCW application, which concrete actions should the participants take to meet the objectives defined during the project?

Answer 4
After the sessions in Nampula and the application of the VCW to solve the project challenge, the participants should take some concrete actions to meet their objectives:
apply the Business Model Canvas they built;
establish deadlines for each planned action;
continue to use the concepts learned during the sessions in their daily life.
Together with Girl Move, the VCW team ensured to monitor the outcomes and if requested provide feedback regarding these actions, progress, and achievement of VCW project goals. Participants were encouraged to apply the VCW to new challenges and spread the VCW tool in a fun way to the local community (e.g., in schools or outdoor seminars especially organized to solve local challenges).

Question 5
How can the project be replicated and expanded domestically or in other countries?

Answer 5
The project and its results ought to be replicated and expanded through the region/country. To do so, Girl Move can exploit the interaction between newly graduated women and young girls, to provide motivation and inspiration for the latter, using other

initiatives, such as the “Mwarusi” project (another Girl Move Foundation project). The participants can promote the contents learned and in this way the VCW can become a tool to multiply the project’s impact and geographical scope.

With a proper training of local VCW ambassadors, the VCW in Mozambique can also be expanded to other fields. For example, Gefra Fulane, a Doctoral Researcher at Nova SBE and VCW Ambassador, is now applying the VCW methodology for prevention of cervical cancer in Mozambique. According to Gefra Fulane:

After a long journey and much debate we discovered together that the best way to apply the VCW methodology is first start by gathering scientific evidence about the problem that we are solving, which is to make the women do cervical cancer screening. In this scenario, we wish to understand why women don’t resort to this screening in the Mozambican cultural context. After we have these answers and all the scientific evidence of the reasons why women don’t resort to cervical cancer screenings, then with the VCW, and the different parties involved, actors, stakeholders, and politicians that operate in Mozambique we will find solutions to outline a prevention program that can be adequate to the needs of women. So, in my case, VCW will simply be used to help women go through cervical cancer screenings.

The key point in replicating the VCW in other countries with common education and social environments is to establish local partnerships with local ambassadors and institutions dealing with similar social challenges. These institutions would work as the facilitators to promote social entrepreneurship and incubation context for new projects/solutions having social impact.

Key Issues for Focus

Issue 1

Social Marketing deals with a great range of social problems/challenges (e.g., unemployment, public health, social exclusion, drug abuse, environmental concerns). Typically, social organizations have a low level of resources to implement their activities, and require extra competencies and deeper insights of VCW topics. In developing countries, the lack of preparation and maturity of using adequate tools is a clear challenge. For those that become providers to help those countries and its citizens, the need to invest in the preparation of the projects and establish good relationships with the social, economic, technological, and cultural realities are fundamental components for success.

Issue 2

The systematization of the VCW process is critical for the development of VCW Certification programs, VCW communication strategies, and for multiplication and success of social marketing initiatives.

Issue 3

Leaders often have to manage a paradox: how to gather the maximum amount of information about a challenge without disclosing confidential information? Information channels have to address challenges as well as generate ideas and filters without putting the individuals/organizations at risk.

Issue 4

Participants of a program often do not use the tools learned as frequently as they could. The definition and implementation of follow up activities should be present as components of a VCW program to ensure the impact factor after knowledge acquisition.

Issue 5

The definition of KPIs is not common knowledge in discussion, although it is fundamental for measuring the success of marketing initiatives. Aside from normal KPIs often used in marketing, such as percent of satisfaction and percent of market share, the identification of what dimensions should be measured and the construction of indicators and associated metrics are very important, notably when referring to social marketing.

In-Class Activities

Creation of a simulated social case, with a specific problem, market, and target audience and definition of a set of assumptions before the implementation phase. The current VCW case study can be presented as an example with possible recommendations.

Definition of KPIs for the Girl Move VCW project, in addition to those mentioned, as also for other projects with social impact, after viewing some cases (VCW YouTube Channel).

Definition of which information is critical to obtain, which is confidential, and which stakeholders to involve in the VCW process.

Design of a potential strategy to ensure that the participants of a VCW course apply the acquired knowledge to implement their projects in future real case situations while involving others in co-creation.

Develop a communication strategy for the case study to magnify the impact of the results seeking to promote women's leadership and combat gender inequality in Mozambican society.

Group 2

Discussion Questions

While building on the VCW videos available on www.openVCW.com (VCW Youtube channel) and www.ValueCreationWheel.com, present examples and discuss the impact of:

Question 1

VCW projects for social impact across the world.

> Answer 1
>
> In addition to these two VCW projects in Mozambique (2017 and 2018 editions), the VCW has been largely applied by individuals and social organizations from over 20 countries around the globe. For example, in Austria the VCW was used to support the Neue Wiener Stimmen (NWS) youth choir. This choir has 90 young singers all united by their love of music and their joy for singing. Despite its brief existence, the choir can look back on many successful concerts and performances in several Austrian states. This chorus applied the VCW to overcome its financial challenge: The current income generated from subsidies from the government, ticket revenues, and sponsoring does not cover the costs. What other financial sources could be used? In Brazil the VCW has also been used to address a wide range of social marketing challenges. For example, Ani Mari Hartz, Marketing Professor and VCW Ambassador in Brazil, recently applied the ONG at the Casa do Menino Jesus de Praga. VCW addressed the challenge of how to raise funds for the maintenance of 40 children with profound brain damage in the new institution unit. According to Ani, this VCW project has strongly benefited from co-creation and the impact was very significant:
>
> We are already starting the implementation and the managers are looking on it favorably. In this methodology I involved 167 people, and achieved 201 solutions/ideas, and 51

filters were established as criteria, which resulted in 25 solutions that I found to be too many, so I thought about putting one more criterion to reduce the number of solutions. However, since the managers were very happy with these solutions, we decided to do an action plan divided into short-term, mid-term, and long-term. At this moment, we are implementing the short-term ones and I have a very positive expectation in terms of the final results. (…) We are thinking about several strategies, but mostly focus on a marketing and communication strategy directed to politicians and law firms with incentive funds like Funcriança that we have in Brazil.

In Hong Kong, Time Auction platform has the vision to make the next generation more willing and able to improve the world. It encourages people to volunteer while networking with key opinion leaders (e.g., academics, celebrities, professionals). People may use the hours from volunteer activities as a form of currency to develop joint-activities with their role models (e.g., cooking, dinners, talks, helicopter rides). This year a team used the VCW to address the current challenge of Time Auction: which university in China should Time Auction partner with in order to increase the supply of students and find key opinion leaders to be used as role models? The VCW Team and the KDMs of Time Auction agreed on the ranking of the filters as follows: 1) Top 20 Chinese cities with highest GDP, 2) Top 20 universities in China, 3) universities with more than 30,000 students, 4) Top 3 cities with the highest amount of donations for charities, and 5) Top City with English proficiency. After applying the Value Creation Funnel to all the Chinese universities, the final target became Fudan University, located in Shanghai.
In 2018, the Impact Hub Lisbon used the VCW as the framework for the boot camp week of the PAES Program (https://www.paes-aceleracao.pt/), which is an initiative to support the development of social startups in an early stage of their projects. The PAES Program is run by Santa Casa da Misericórdia de Lisboa (SCML). SCML was created in A.D. 1498, and is one of the oldest social organizations in the world and a reference in Europe. The success of a wide of range of social initiatives led to an increasing interest in the VCW across different fields. This is the case of Montepio, a savings bank focused on retail banking and fully owned by Montepio Geral – Associação Mutualista (MGAM), the largest association and the largest mutual association in Portugal. According to Fernando Amaro, Marketing Director at Montepio:
VCW is an innovation methodology, and aids in finding the solutions for problems of any kind, and this is why this methodology can be applied in every conceivable area, at a client level but also at an internal level by Montepio. In our case, what we are promoting has to do with the social innovation area and social entrepreneurship. In our case, this methodology perfectly suits the idea generation that meets the solutions for existing problems, at present and future. This is why the components of this methodology fit like a glove inside Montepio's incubation process in the social innovation and social entrepreneurship field.

When comparing this VCW case with other VCW social-impact case studies around the world, the social entrepreneurs selected by Girl Move in Mozambique show a greater tendency to identify solutions to satisfy global needs rather than their own specific needs. Due to the nature of the Girl Move Leadership Academy Program, there is openness and receptiveness to adopt social marketing techniques dealing directly with social problems. The hands-on practical approach and the associated VCW process, promoting the continuous development of a solution for different challenges, are perceived as extremely important in the Mozambique case. This is probably related with cultural aspects and with a higher predisposition to action and to see immediate results. On the other hand, for the VCW cases conducted outside Mozambique, the participants in developed countries have the tendency to identify business solutions of a long-term perspective that are more innovative, competitive, and sustainable. Additionally, although the groups are more heterogeneous, there is a tendency to select challenges with more capacity to be replicated in other developed markets (e.g., a common challenge is "How to find volunteers?"). This was the case of ReFood (https://www.re-food.org/en). According to Hunter Halder, Founder of ReFood:

ReFood tries to meet two global problems and these are: food waste, which represents about one third of the food produced on our planet (...), and hunger, which is a scourge that has been with us for many years. Our humble project fights these two things. The food that is in perfect condition that otherwise would go to the trash is delivered to people in need in every community. Now we serve 40 communities with 7000 volunteers and 6000 beneficiaries and about 1500 partners. So, this is the job we do. Due to our expansion and growth, we were searching for solutions for these new challenges, and in this case, VCW was used as a tool to help us to deepen our understanding of different problems, one of which concerned the organization of the national group where the volunteers don't see the fruit of their labor when doing their work, unlike what happens with the local groups. In the local groups you go to a restaurant, you receive a certain amount of food that is given to someone and you are very aware of your contribution. On the other hand, working in the office on the computer with Excel sheets you don't have the same enjoyment. Naturally, we needed to find a personal solution for the national group to do this job, and this methodology showed us the way forward.

Question 2

VCW projects to address personal challenges around the world.

Answer 2

Over the years the VCW has often been used by individuals in a wide range of countries (e.g., Bulgaria, France, Germany, Poland, and Portugal) to address their personal challenges. The most popular personal challenges have been:

What is the best job for me?
What should be my value proposition?
What are my career development opportunities?
How to find the perfect job?
How to enter the job market?
Where should I move with my family (after the MBA)?
How to become financially independent?

An interesting case was provided by a 55-year-old woman who was unemployed for more than seven years. She was living on the assistance from her brothers and this started to generate discomfort in the family. Despite her experience in the administrative area, she was unable to find a job, mainly because she wanted to work only as an assistant director or as a director. Additionally, she had some rigid filters: work no more than eight hours a day and have weekends off. After seven years of unemployment, in search of a solution, she and her brothers decided to apply VCW. The brothers found 22 different ideas and passed them on to her (in this case, the only key decision maker, who had to make the final decision). She saw ideas that had never crossed her mind. The same was done with the filters. When she decided to analyze all the ideas and filters, the decision ceased to be of others and became hers. Before using VCW the brothers would tell her what she had to do and she would soon kill the ideas. But with the VCW methodology, she has appropriated the solutions that came from the stakeholders. The final solution chosen was to work as a caregiver for the elderly, a career that she had never imagined. Next came the prototype: she researched what it took to become a caregiver, redesigned her curriculum to align with market needs, and sought certification in geriatrics. Today she is highly motivated and has already entered the geriatrics labor market.

The success of the VCW methodology applied at the personal level led to the creation of different “VCWyou” workshops. Additionally, it has significantly contributed to disseminating this methodology. For example, in Portugal the VCW helped participants of the first and second editions of Escola de Impacto (Impact Hub Lisbon—https://lisbon.impacthub.net/escola-de-impacto) to identify and develop new professional opportunities. Escola de Impacto is a joint program promoted by AGEAS Foundation and Impact Hub Lisbon since 2017. According to Gonçalo Ahren Teixeira, General Director of Impact Hub Lisbon:

We initiated the project, the first incubation program with VCW, by involving about 30 participants, 30 projects or entrepreneurs if you wish. (…) The curious thing about the results is not even economic but the transformation we witnessed in the participants that initially had a concept/an idea for their project, but during this time, many of them recognized the need to change and adapt their idea according to the VCW methodology or according to the methodology process.

As mentioned by one of the participants attending one of the VCWyou workshops:

Although it was my first time using the VCW, the process became familiar very quickly. It’s very intuitive and thorough. I have already introduced the concepts of the VCW to use for my oldest daughter’s university selection process. She has two years to decide, but I am excited to use the VCW for this and other issues in the future.

Question 3

VCW projects in organizations and consultancy firms around the world.

Answer 3

The VCW is a real-life problem-solving framework that helps the key decision makers of organizations, governments, and societies to find a customized solution for their problems and challenges (see Lages 2016 for different examples). It has been applied by several Fortune 500 companies and other organizations across various sectors. Large organizations that have benefited from the VCW meta-framework to solve their challenges include Ageas Insurance, Alphamega Group, Airbus-Eurocopter, Cathay Pacific Airways Catering Services, Crowne Plaza, Cytamobile-Vodafone, Everis, Four Seasons Hotel, GDF Suez, Gemalto, IGT, Jerónimo Martins, Lufthansa Technik, Mastercard, Otis, Piraeus Bank, Rio Tinto Alcan, Santander, Thomson Reuters, UPS, Universal Life Insurance Cyprus, and Vienna International Airport.

The VCW is often used by owners, presidents, directors, and consultants as a tool for corporate governance of medium and large organizations. This was the case of INCM-Portuguese Mint and Official Printing Office. Based on the needs of the INCM, a VCW innovation ecosystem was established.[1] This VCW ecosystem rested on three fundamental layers for an innovation management, which could be efficient and applicable throughout the whole organization.

First is the governance model, which establishes the main responsibilities and functions for the innovation management challenges. Second is the VCW Innovation Framework supported by its five phases (Lages 2016). Third is a network of stakeholders used to increase the problem-solving potential of the VCW Innovation Framework. After concluding the project design, the consultancy firm Everis, together with the VCW creator Luis Filipe Lages, applied the VCW framework with the goal of solving the challenge: how to reduce costs and create value for INCM organization?

Gonçalo Caseiro, the current President of INCM, describes the whole experience[2]:

[1] https://youtu.be/35JuEp9PAJk

[2] https://youtu.be/35JuEp9PAJk

INCM has been reinvented several times during its 700 years of history. Knowing our ability to innovate, the starting point of this project was to find out how we could industrialize innovation with the help of a consulting firm, Everis, and the precious know how of academia. In this case we had the support of Universidade Nova de Lisboa and Professor Luis Lages, who helped us with his VCW methodology for innovation management, in order to manage the process internally and industrialize innovation. Today was the innovation day and it was absolutely fantastic to see people's effort and to see how this subject motivates all employees. I believe that in future editions of the Innovation Framework and with the involvement of universities, we will be preparing ourselves for another 700 years of history. That is the important thing, to prepare the company for the future.

Marta Figueiredo, an ex-Everis consultant who accompanied all the VCW implementation process at INCM mentioned:
It was a very interesting experience because this contact with VCW affected me on a deep level, even in the way I position, lead, and manage my current organization. Indeed, a new, different awareness emerged: innovation can be in each one of us and being aware that anyone can be a catalyzer of a new idea, and a new solution. That is why it is essential to create spaces of co-creation in companies and our daily lives to decide what steps to take, but in the case of the social area this is a favored sector with a strong social initiative in which people already have a tendency to get involved, many with very good will to be involved. (…) I am conscious that we have a far-reaching network of stakeholders that includes clients, beneficiaries, volunteers, potential partners, and therefore it is crucial to have a methodology that deep down allows to seize all the contributions and richness that each one of us wants to give and can give. Basically, to have an organized way to receive ideas and put them into practice.

In addition to a wide range of medium and large organizations, the VCW has also been used to solve the challenges of associations (e.g., League of Professional Portuguese Soccer), cities (e.g., Forbach), governments (e.g., Lisbon), hospitals (IPO Porto), innovation camps (e.g., the camp-Marseille), NGOs (e.g., ReFood), start-ups (e.g., WhyMob), trade associations (e.g., Nerlei), schools (e.g., CSCM), and universities (e.g., Marseille University). An interesting example of effective implementation of the VCW is provided by Acredita Portugal association. This association is one of the main partners of Montepio and focuses on the development and promotion of entrepreneurship skills. According Pedro Queiró, CEO of Acredita Portugal:
The association uses the VCW methodology to define all of its existence, which is much more than specific projects. All of the operational model was redefined based on this (…). We use the VCW to understand how we can create more value for Montepio. How we can maximize what Montepio takes from Acredita Portugal and how to maximize what we take from Montepio in this relationship. We used the VCW to define the entire operative model throughout the year, not only in one project, but also the mission, and the entire association service model to be catered to the Portuguese society.

It is very common for CEOs, C-Level executives, and directors to be resistant to change as well as skeptical about new methodologies. This was the case of Paulo Pires, the CEO of WhyMob:
Three years ago WhyMob was a start-up, and an opportunity arose to internationalize a solution for the healthcare sector. This solution was essentially the recording of organ transplants for the national healthcare system, and so in this scenario, we applied VCW in this system, during the implementation experience while trying to position this solution in the international landscape. I started as a skeptic in relation to this methodology and I

confess that in the first stage, I didn't expect the results we obtained. In the end of all the process, we arrived at very practical solutions, and we achieved our objectives that we had set out. Indeed, it was a very pleasant surprise to me.

An extensive list of past organizational challenges addressed by the VCW can be found at http://www.valuecreationwheel.com/vcw-in-business/.

Question 4
VCW projects in academia and education around the world.

Answer 4

Schools on different continents have applied, and continue to apply, the VCW as a supporting tool for several courses, namely in the fields of marketing, innovation, entrepreneurship, social impact, and value creation. This is the case of the American University of Armenia, American University in Bulgaria, Babson College, City University of Hong Kong, Coimbra Business School, Cyprus International Institute of Management, Donau University at Krems, ENPC-Paris, ESPM Sul- Brazil, FGV- Brazil, Goethe Universitat Frankfurt, Helsinki School of Economics, IAE-AIX Marseille University, IPAM-Portugal, IPL-Leiria, Korea University Business School, MIT, NEOMA-France, Nordakademie-Hamburg, NC State University, PEF-Austria, Politechnika Gdanska, Porto Business School, Solvay Business School, Valencia University, Vienna University, and Warwick Business School, among others.

In some universities (e.g., Donau University at Krems, Marseille University, MIT, and Nova University of Lisbon), the VCW is being used across different programs (ranging from undergraduate to MBAs and executive education) in more than one school (e.g., schools of biotech, business, medical, engineering, law, science, and technology) to address a wide range of challenges. In other schools the VCW is being used across different programs. This is the case of IPAM, a school specialized in marketing. According to Pedro Mendes, Director of IPAM:

We look at VCW as a great opportunity. Our first contact with Professor Luís Lages occurred at the right time, when we were reformulating our academic model for undergraduate and graduate programs in marketing management. At the end, considering the characteristics of this academic model, after a lot of experience and daily contact with real companies in search for real solutions to real problems, we realized that our students needed a model that would allow them to gather and organize a set of tools to solve problems by looking for solutions adapted to the world we live in. Because of the VCW model, we find here a solution for this curricular unit that will also be applied in our academic model in several projects in the future.

The first successful application of the VCW model already occurred in the IPAM's Branding graduate course, which was developed in collaboration with the Aga Khan Foundation (AKF). This VCW project started with a diagnostic process, and after the generation and analysis of a series of ideas and filters, several actions were recommended to the AKF.

Since the application of the VCW methodology is user-friendly, it might also be used to promote leadership and problem-solving skills across different levels of education. This explains why primary schools are applying a customized version for children ("VCWKids") to solve their organizational challenges. This was the case of Colégio Sagrado Coração de Maria (CSCM), which agreed to address the challenge about how to improve the school meals. In order to address this challenge CSCM involved over 80 children of the third grade, professors, parents, and the key decisions makers. According to Elsa Lopes, teacher at CSCM:

> Last year, we used this methodology to find solutions to improve the school meal. (...) We often handle satisfaction surveys with the complaints from parents and students about the school meal, and this was one of the areas that gave us concern. This is an excellent framework to put the entire school community thinking together about the best solutions to improve the food served at school. This framework was very useful, but it was also good to make the children aware that their opinions matter and they can help solving problems that affect them too.
>
> This project had a significant impact on the school. Several ideas generated by the children were implemented and today parents' and children's satisfaction levels about food quality have increased significantly. Children in elementary education were able to understand all the concepts inherent to the VCW methodology without any need to translate it in a child-like manner. They had creative moments, they easily understood what a criterion was, they were able to filter all the ideas quickly, and to find the best solutions to improve the school meal. As a result, Luísa Agante, a marketing professor, became responsible for implementing VCWKids in Portugal. Currently she is seeking ways to apply this tool in projects involving child obesity.
> An extensive list of educational initiatives developed by the VCW can be found at: http://www.valuecreationwheel.com/vcw-teaching-materials/.

Key Issues for Focus
Participants of a VCW program often do not research past projects or use VCW tools as often as they could. The implementation of pre-course activities and previous learning about existing VCW projects should be present as components of a VCW program to ensure a better preparation, a faster learning process, and superior knowledge acquisition.

In-Class Activities
Design a pre-assignment before the course to ensure that the participants learn about past projects and get acquainted with VCW tools before initiating their own project.

Additional Resources
Articles about VCW methodology:
Lages, L. F. (2016). VCW—Value Creation Wheel: Innovation, technology, business, and society. Journal of Business Research, 69(11), 4849-4855.
Lages, L. F., Fonseca, V., & Paulino, M. (2018). The VCW-Value Creation Wheel: A framework for market selection and global growth. Advances in Global Marketing (253-279). Springer, Cham.
Fonseca,V., Lages, L.F., & Kim, Phil (2018). Deimos: expanding to a new market using the Value Creation Wheel. Case-Study BAB370-PDF-ENG, Harvard Business Publishing.
Prahalad, C. K. (2006). The Fortune at the bottom of the pyramid. Pearson Education India.
Prahalad, C. K., & Hammond, A. (2002). Serving the world's poor, profitably. Harvard Business Review, 80(9), 48-59.

Case-studies of VCW application:
www.openVCW.com
www.valuecreationwheel.com
Girl Move activities and results:
https://youtu.be/k5b9ivLK55w
http://www.girlmove.org/eng/index.html
https://www.facebook.com/girlmove

Chapter 10 **A Win-Win Social Marketing Campaign: A Safe Ride Service Raising Money for Charity**

Katherine C. Lafreniere and Katharine Howie

Discussion Questions

Question 1
Is it possible that this service does not reduce the number of impaired drivers if they are only attracting clients who would have otherwise called a taxi or designated driver? The service could merely be another alternative for people who are already making safe choices. How can campaign managers measure ORN's success in reducing the number of drunk drivers?

Answer 1
To assess whether or not the program is truly reducing drunk driving and accidents, the U of L can use existing secondary data on traffic accidents, deaths, and impaired driving tickets given in December before and after the program began, adjusting for changes in population. Since the program has been in operation for many years, this measure can only provide a very rough approximation of the impact of the program. They may also want to look for matching communities to compare. These would be other communities with similar size and demographics, that do not have such a program.

Question 2
How valuable is publicity in this case? How valuable is publicity for social marketing in general?

Answer 2
The Operation Red Nose program makes a great special interest piece for radio and newspapers, especially around the holidays. Students can discuss why this PR is so important, different strategies to attain coverage, and examples they've seen of social marketing in mass media. Since the Pronghorns have a goal of enhancing the teams' reputations, PR is a great way to achieve this.

This is a good time to point out that many social marketers mistakenly think that the promotional "P" within the marketing mix is the most important. This is not the case. Having a good product, available at a good price in a good location, matters much more. As was said in the case, word of mouth is a very effective form of communication when people are happy with what you are offering.

Question 3
The organization Operation Red Nose has the challenge of getting numerous stakeholders involved to grow their organization. Imagine that you are a marketing manager for the Operation Red Nose and are trying to enter a new community. What stakeholders do you need buy-in from in order for this expansion to be successful? What barriers are each stakeholder potentially facing?

Katherine C. Lafreniere, Alberta School of Business, University of Alberta, Edmonton, Canada. Email: klafreni@ualberta.ca
Katharine Howie, Dhillon School of Business, University of Lethbridge, Calgary, Canada. E-mail: Katherine.howie@uleth.ca

Answer 3

Stakeholders	**Perceived Barrier**	**Suggestion for Overcoming**
Ride Users		

Many potential answers exist. Below are a few possibilities:

- Organizations that could potentially participate (like sports groups)
  Barriers for this group might be factors like perceived complexity, lack of volunteers, and lack of awareness about ORN. Suggestions for overcoming the barriers would be to design videos that highlight other organizations success. Additionally, ORN could design tips for recruiting volunteers.

- Local media outlets are important to spread awareness about the program. Barriers for this group might be lack of awareness, concerns about legitimacy, or the perception that their viewers would not be interested in the topic. Suggestions for overcoming barriers would be to provide statistics about the history of the organization and examples of past PR coverage.

Question 4
This case study explained the differences between promotion- and prevention-focused messages. Find an example of social marketers using each type of framing and explain why it fits into that category.

Answer 4
Retrieved from: http://www.apta.org/PTinMotion/News/2016/6/7/ChoosePTCampaignLaunch/

Fig. 10.1 This ad from the American Physical Therapy Association is using a promotion focus in their message. They are highlighting the safety of choosing physical therapy over potential opioids. Source: http://www.apta.org/PTinMotion/News/2016/6/7/ChoosePTCampaignLaunch/

This ad from the American Physical Therapy Association is using a promotion focus in their message. They are highlighting the safety of choosing physical therapy over potential opioids.

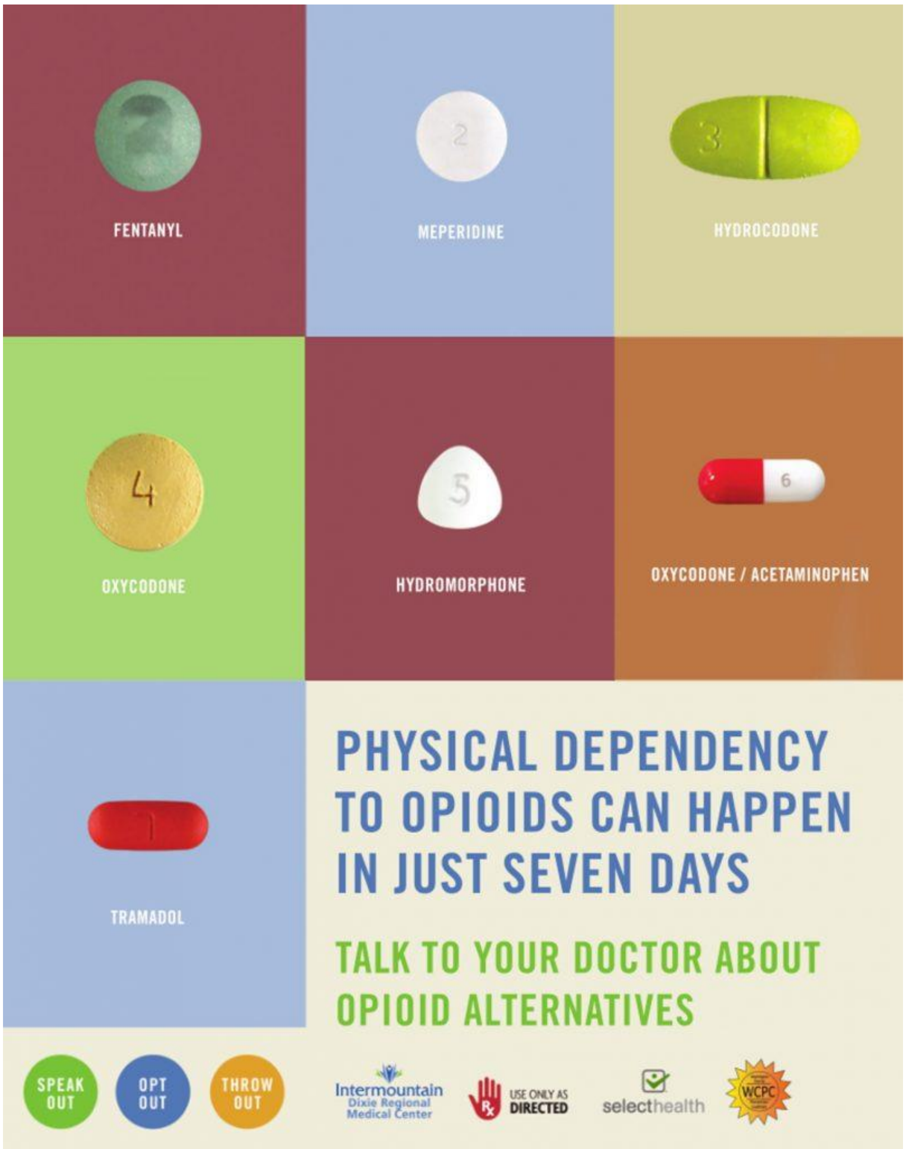

Fig. 10.2 This ad is from an initiative in Utah to combat opioid usage. It highlights the risks associated with opioid use. This negative focus is a prevention focus. Source: https://www.stgeorgeutah.com/news/archive/2017/10/11/mgk-dixie-regional-plasters-messages-across-hospital-campus-in-campaign-against-opioid-abuse/#.W1SpQ9VKhoA

This ad is from an initiative in Utah to combat opioid usage. It highlights the risks associated with opioid use. This negative focus is a prevention focus.

Question 5
Many liquor companies donate money to programs that encourage the responsible use of their products. Do you think this is an ethical obligation of the company? Why or why not?

Answer 5
This answer will be the student's opinion. Possible answers could be responses like:

Yes, I think it is the company's obligation because they produce products that have the potential for societal harm. These companies profit from the sale of these products and it is their responsibility to help educate the consumers about the potential risk. It is not fair for the government and other organizations to have to manage these risks.

No, I do not think liquor companies are obligated to address the social issue around their products. The goal of companies is to create products customers want and maximize shareholder wealth. Companies do not have the responsibility or the expertise to address these social issues. The government and non-profit organizations are the ones responsible.

In-Class Activity
First, have students decide whether they are more promotion or prevention oriented. Below is a list of traits that will help them evaluate which side of the spectrum they lean towards. Have students pair up with someone from the opposite mindset. Challenge them to develop social marketing messages to address each of the following issues with a prevention frame and a promotion frame. During the activity have them discuss what messages resonate with them and what messages aren't persuasive.
Prevention-Focused
Realistic
Wants to avoid danger and mistakes
Risk-averse, prepares for the worst, uses opportunities to avoid failure
Goals are completing responsibilities and obligations
Keeps processes going and running properly—maintaining the status quo
Motivated by criticism and fear of failure
Work is done thoroughly, carefully, and with accuracy
Vigilant, analytical and detail-oriented
Promotion-Focused
Optimistic
Open to new opportunities
Focus on aspiration, achievement, and reward
Motivated by praise and positive feedback
Willing to take chances and make mistakes on way to success
Works quickly
Innovative, creative, and open to new opportunities
(Grant and Higgins, 2013; Halvorson 2013)
Social Issues
The opioid crisis
Anti-bullying
Blood donation
Food waste

	Promotion	**Prevention**

Opioid Abuse		
Bullying		
Blood Donation		
Food Waste		

Additional Resources

Aaker, J. L., & Lee, A. Y. (2001). “I” seek pleasures and “we” avoid pains: The role of self-regulatory goals in information processing and persuasion. Journal of Consumer Research, 28(1), 33-49. https://doi.org/10.1086/321946

Brendl, C. M., Higgins, E. T. & Lemm, K. M. (1995). Sensitivity to varying gains and losses: The role of self-discrepancies and event framing. Journal of Personality & Social Psychology, 69(6), 1028-1051. doi: 10.1037/0022-3514.69.6.1028

Grant, H. & Higgins, E. T. (2013). Do you play to win – or to not lose? Retrieved from https://hbr.org/2013/03/do-you-play-to-win-or-to-not-lose?

Halvorson, H. G. (2013). Who is Right? Is it you? Retrieved from https://www.forbes.com/sites/heidigranthalvorson/2013/04/23/who-is-right-is-it-you/#4ed74393a899

Mogilner, C., Aaker, J. L., & Pennington, G. L. (2008). Time will tell: The distant appeal of promotion and imminent appeal of prevention. Journal of Consumer Research, 34(5), 670-681. Retrieved from https://www-jstor-org.ezproxy.uleth.ca/stable/10.1086/521901

White, K., MacDonnell, R., & Dahl, D. W. (2011). It's the mind-set that matters: The role of construal level and message framing in influencing consumer efficacy and conservation behaviors. Journal of Marketing Research, 48(3), 472-485. Retrieved from http://www.jstor.org/stable/23033852

Chapter 11 Social Marketing for the Reduction of Tax Evasion: The Case of Electronic Invoicing in Portugal

Beatriz Casais, Marisa R. Ferreira and João F. Proença

Introduction

The subject of our case study is the use of electronic invoices as a mechanism to fight against tax evasion and fraud.

The e-invoice program is intended to encourage fulfilling the obligation to issue invoices in all business transactions, with a website as support tool and a set of deductions and fiscal benefits to taxpayers who request invoices.

The pedagogical objectives are to understand the key purposes of the e-invoice program in relation to (i) awareness, (ii) recognition and (iii) action. More specifically, the pedagogical objectives are to: (i) identify promotional mechanisms, identify target audiences and positioning; make a critical analysis of advertising and promotional strategies, targets and positioning, and identify potential improvements; (ii) analyze and understand the fiscal benefits and rewards and verify if they are appropriate to the program's core objectives; (iii) identify opportunities to improve the program, as well as the main difficulties in implementation and ethical considerations. We expect that students will be familiar with various elements of a marketing mix, will understand the importance of social marketing, the importance of marketing strategies and their adaptation to different audiences, and will learn how to set an appropriate marketing strategy considering specific targets.

Beatriz Casais, University of Minho, School of Economics and Management; Polytechnic Institute of Cavado and Ave; Universidade Europeia - Laureate, E-Mail: bcasais@eeg.uminho.pt International, IPAM Porto;Affiliation: University of Minho, School of Economics and Management; Polytechnic Institute of Cavado and Ave; Universidade Europeia - Laureate International, IPAM Porto

Marisa R. Ferreira, Polytechnic Institute of Porto, School of Technology and Management, CIICESI, E-Mail: mferreira@estgf.ipp.pt

João F. Proença, University of Porto, Faculty of Economics and Management; ADVANCE/CSG, ISEG, University of Lisbon, E-Mail: jproenca@fep.up.pt

The following table shows our suggestions as a guide for the pedagogical approach.

Session	Objectives	Resources	Time
1st session	Arouse interest in the Case Study with a short presentation of the case and a brief review of the website	Projector and screen for presentation of the case (slides) and websites	10 minutes
Out of class	Make a brief diagnosis of e-invoicing, considering promotional mechanisms, target audience, positioning and marketing strategies	Suggested readings on: promotional mechanisms, target audience, positioning and marketing strategy Solving the case	60 minutes 40 minutes
2nd session	Address the discussion questions to confirm that the pedagogical objectives are met	Discussion (in classroom), led by the teacher / tutor, to ensure all the questions are addressed.	60 minutes

Table 4 Guide for a pedagogical approach.

Discussion Questions

Question 1
Are the promotional mechanisms adequate and sufficient to create awareness in the target audience?

> Answer 1
> Communicating the good results of the campaign in a more intensive way to a broader audience may increase the awareness of the audience.

Question 2
What are the weaknesses of this program?
The most important weakness is related with behavior sustainability and it is not clear whether the e-invoice program may work without the incentives.

> Answer 2
> Do you have suggestions for improving the program promotion efforts?
> Actions to communicate the benefits of the campaign may bring good results. At the same time, the use of social media can be an interesting way of improving program promotion.

Question 3
Are the fiscal benefits suitable and adequate to increase recognition of the problem?
The identification of fiscal benefits is a very important pillar to the program, and program development / growth may include a stronger focus on the economic and societal importance of counteracting the underground economy and tax evasion.

Answer 3
Are the rewards for website users adequate for increasing the problem recognition?
Considering the growth in the number of people requesting invoices, as well as those receiving prizes, it seems that there is now greater problem recognition.

Question 4
Are there ways to transfer the self-interest of rewards focused on prizes and incentives, to appreciating how a more complete declaration of taxes brings advantages to individuals and society?

Answer 4
Providing information about self/other discrepancy might correct misperceptions and improve compliance (Wenzel, 2005), thus we suggest a more intense and wider communication of the results of the campaign and its advantages to all actors.

Question 5
Are there other target incentives that should be approached?

Answer 5
Yes, probably broadening the areas that allow consumers to get tax benefits.

Question 6
Are there opportunities to improve the program (for taxpayers)?

Answer 6
Considering the automatic confirmation of invoices, the process seems to be sufficiently intuitive. The program could be greatly improved if we could add the fiscal number automatically. Untold hours are wasted every day in the oral mis/communication and manual entry of the fiscal number when paying, so the program would be greatly improved if every payment by debit/credit card automatically included the fiscal number in the payment transaction.

Question 7
Are there some ethical considerations about data protection (for taxpayers and business firms)?

Answer 7
It is important to ensure that: all elements are communicated to Tax Authority by companies, and safeguard the universal and systematic fulfilment of the obligation to communicate safely; a strategy is developed to ensure that the values declared by taxpayers in their VAT and Income Tax returns fully reflect the tax facts communicated through the e-invoice system, using both the data provided by the issuing companies as well as that from buyers and consumers.

Additional Resources

https://faturas.portaldasfinancas.gov.pt/
https://ec.europa.eu/taxation_customs/business/tax-cooperation-control/vat-gap_en

Barrell, R., & Weale, M. (2010). Fiscal policy, fairness between generations, and national saving. *Oxford Review of Economic Policy, 26*(1), 87–116.

Bobek, D. D., Roberts, R. W., & Sweeney, J. T. (2007). The social norms of tax compliance: Evidence from Australia, Singapore, and the United States. *Journal of Business Ethics*, *74*(1), 49–64.

Hastings, G, Angus, K & Bryant, C (2011). The SAGE handbook of social marketing. Sage.

Weinreich, N (2011). Hands-On Social Marketing: A Step-by-Step Guide to Designing Change for Good. Sage

Chapter 12 **Worn Wear: Better Than New – How Patagonia's Social Marketing Campaign Enhances Consumers' Repair Behavior**

Nina Bürklin

Introduction
This case study aims to answer discussion points that fall into three topics: (a) social marketing, (b) corporate communication, and (c) social norms. Discussion questions one to three are suitable to discuss in class while questions four and five are recommended to be responded to in group work and written format respectively.

Discussion Questions

Question 1
What are the potential benefits and risks of the *Worn Wear* communication strategy, especially regarding the social and environmental commitment of the company?

Answer 1
The communication of the Worn Wear campaign adopts the company's overarching approach to attract people with the same values and a similar commitment to environmental protection. Through the established position and image as an activist company, the campaign profits from a high level of trust from the customers' side and bears great credibility. That way, the company is not accused of greenwashing, but taken seriously by its stakeholders. The strong coherence across all communication channels creates another benefit. While each source of information about the social marketing campaign (e.g. road show, website, point of sale) bears different aspects, the main message is always the same: despite all corporate efforts, all business does harm to the environment and therefore a greater consciousness is needed. It directly aims at behavioral change regarding repairing and recycling as well as disposal behavior.
One of the campaign's risks lies in the great skepticism, especially from new customers or not-for-profit-organizations (NPOs). New customers could evaluate the Worn Wear campaign as greenwashing which would only account for the traditional profit, but not for the company's sincere intentions to contribute to better use of resources. NPOs could furthermore accuse Patagonia of shifting responsibility towards the customers. Both factors could lead to a loss of positive reputation and, finally, weaken the outdoor manufacturer's position in the market.

Question 2
How was the principle of social norms adapted in the *Worn Wear* campaign? In how far do you think it was successful?

Answer 2
The Worn Wear campaign provides some examples of how a profit-oriented company can induce behavioral change through the establishment and communication of social norms. The expected social change lies in an alternative consumption behavior of Patagonia's customers that includes repairing and recycling and disregards quick methods of disposal or new purchases. The principle of social norms includes the idea that individuals learn from relevant role models what kind of behavior is "correct" or socially accepted in a specific environment.

Nina Bürklin, Ludwig-Maximilians-University Munich,Email: buerklin@bwl.lmu.de

In the given context, social norms are formed by other customers who have successfully participated in the Worn Wear campaign. They can be considered to be part of a community of like-minded people who share similar values, like: environmental protection, minimalist lifestyle, and passion for outdoor sports. Through their personal stories which are shared on the company's website, other members of this social group can learn and imitate this behavior. As Patagonia's corporate strategy is based on these ethical values, too, the social marketing approach maximizes success.

Question 3
What are potential opportunities and downfalls of combining social and commercial marketing? In how far can business activities support the social change?

Answer 3
With its Worn Wear campaign, Patagonia dares to blur the boundaries between commercial and social marketing. While all efforts must be considered part of the company's sincere interest to secure natural resources, it must be looked at in the context of a profit-oriented business as well. The outdoor manufacturer's mission to "[b]uild the best product, cause no unnecessary harm, use business to inspire and implement solutions to the environmental crisis" encompasses the idea that commercial activities can support social change, in this case environmental engagement. Regarding financial resources, business activities can strongly support the social marketing campaign as they can be considered an investment into the market stability of the company. Further, its international business network with retail partners all over the world can easily increase the reach and, thus, the impact of the Worn Wear campaign. Additionally, the experience of the company's marketing and sales team can support the roll-out and further development of the campaign through its knowledge from the business side.

Nevertheless, the application of social marketing in a market-driven environment bears some risks, too. Patagonia was accused of being more of a luxury brand than an environmentalist company and had to struggle with its coherent reputation. Furthermore, through a successful campaign like Worn Wear that addresses a specific community with certain values based on social norms, the company's customer base will grow bigger and stronger. Thus, the social campaign's success leads to a commercial success, too, which is often criticized by environmentalist groups. In an attempt to express their sincerity about this social change to come, Patagonia donates either 1% of sales or 10% of profits every year, whichever one is greater. Additionally, it bears the costs to be a certified B corporation which guarantees the adherence to standards of environmental and social performance as well as accountability and transparency.

In-Class Activity

The first question is discussed openly in class in order to get an overview of the stakeholder network which can also be sketched on a whiteboard (15 minutes). Second, students should team up in groups of three to four in order to thoroughly analyze one stakeholder group and its goals (15 minutes). Afterwards, in-class time could be used to present the most important aspects of each stakeholder group and discuss how far these can be integrated with others or seem to cause conflicts (15 minutes).
Among the campaign's most relevant stakeholders are its customers, retail partners, and environmental grassroots initiatives. Further stakeholder groups are competitors (e.g. North Face), policy makers (to cooperate or be put under pressure in order to set up industry-wide regulations), nature itself (e.g. National parks that are being saved by Patagonia), and society at

large (as everyone profits from reduced environmental harm). Customers are interested in buying outdoor clothing that supports them with high functionality, good quality, and innovative design in their daily lives as well as during their sports activities. By purchasing Patagonia gear, they try to adhere to their minimalist lifestyle according to the principles of voluntary simplicity and reduction of environmental harm as much as possible. The company's retail partners are especially relevant because they enable the transfer from the business ethos into the direct customer experience. Through their commitment to the brand and, thus, to the campaign, they support the overarching idea to foster a conscious use of natural resources. These partnerships must be characterized by long-term commitments in a business context and high levels of trust and respect in a relations context. Further, environmental initiatives play a crucial role in Patagonia's stakeholder network. On the one hand, they serve as the most critical group and always question the status quo of the company's business activities in terms of sustainability. On the other hand, they are a valuable partner in the process of raising awareness for the cause and developing initiatives to foster environmental protection on the corporate and customer side.

Other social marketing campaigns can improve their impact through the integration of various groups from their stakeholder network. By establishing close relationships to retail partners, they can bring the campaign's effectiveness to an international level. Through the integration of customers into the campaign, e.g. through the personal stories they tell, the social marketing approach becomes more credible and will disseminate more easily through (virtual) social networks.

Out-of-Class Activity

The last question is designed for a response in a written format to be answered by each student individually. For a more creative approach, students could be asked to develop a collage (analogue or digital; DIN A2) to describe their persona through images. Further, it could be worth discussing different types of personas and why the students described them this way. Volunteering students could present their personas and then discuss the differences in class (30 minutes).

While there is not the one right answer, the following gives an idea of what to expect. For the persona as target group of the Worn Wear campaign, students could identify the characteristics of an environmentally conscious, but at the same time fashionable person, likely from the city with a high willingness to pay for trendy products. Most probably, Patagonia's (future) target customer is a member of generation Y who differ from previous generations in their personal values and attitudes and is around 20-30 years old. The persona enjoys spending time in nature and likes to do sports such as running or surfing. Generally, the person leads a rather minimalistic lifestyle, but has a preference for high-quality products that feature a special, though classical design. She or he expects more than retail therapy from life and enjoys experiences such as long walks, music festivals, or cooking with friends. Further, the person seeks personal fulfillment in the work she or he does and does not necessarily have a 9-to-5-job but could work as a freelancer. The person could already have small children whom she or he cares for a lot and is even more conscious about saving planet earth for future generations.

Teaching Guides for Health Related Cases

Chapter 13 Using Social Marketing to Encourage Hand-Washing Habits Among Children in India

Dinesh Kumar and Punam Gupta

Discussion Questions

Question 1
What other innovative methods can be used to change habits for the long term?

Answer 1
The instructor encourages students to think out-of-the-box and suggest strategies that could be used to help problems of developing countries. Elements of motivating and habit re-enforcement can be brought into the discussion.

Question 2
Since such activities depend on sponsors, how can activists generate interest in sponsors where profit motive is not primary?

Answer 2
The first key is to identify key sponsors: pharmaceutical and other companies making hygiene products could be asked to donate their products for such workshops. Socially minded doctors and hospitals are another set of sponsors that could be tapped. The instructor can raise the debatable question whether media should be asked to cover the events. Interest can be generated if companies can also sell their products in such areas. Getting a celebrity as brand ambassador can help in generating donor interest.

Question 3
Can this program be replicated in other areas or countries?

Answer 3
Students can be asked to read World Bank papers and experiences in diverse countries like Peru, India, Africa, and others and decide for themselves how such a program can be replicated there.

Question 4
What other events can be held to generate interest in the target audience?

Answer 4
Movies, school programs, picnics, magic shows, etc., can be suggested. The important point is that social organization has to build the event around fun activities.

Dinesh Kumar, Marketing, Jagran Lakecity University, Bhopal, India. E-mail: mmindchd@gmail.com
Punam Gupta, Dev Samaj College for Women, Chandigarh, India. E-mail: punam.devsamaj@gmail.com

Question 5
How can other marketing and management principles be applied to social campaigns?

Answer 5
Management principles like these can be discussed: motivation, communication, managing teams, generating buzz, habit forming. The case discusses these principles and how they were used in the campaign.

Question 6
Do you have suggestions for improving their promotional or execution efforts?

Answer 6
This question calls for creativity of the students. They can brainstorm and discuss ways of improving promotional and execution efforts of such social projects. They can make campaigns, fun events, small plays, or dances as suggested in in-class activities to make the activity more interactive.

Key Issues for Focus
One way of introducing this case is that the teacher summarizes the problem and asks the class what they would do to inculcate the habit of hand-washing among poor children. Several possible solutions could emerge. The instructor explains that rather than a direct approach, an indirect marketing approach would influence people much better. Just as marketing builds excitement around a brand, social campaigns must also build interest and excitement rather than lecture on an issue. The students are then asked to read the case and see if their ideas match with the actual execution.

In-Class Activities
The instructor can show some interesting videos relating to the hand-washing habits. Some of these are listed below.
Students can be asked to prepare a commercial/dance/fun activity/play on the hand-washing theme that can be used in such campaigns. A video of a "handfie" can be uploaded on YouTube.

Out-of-Class Activities
Students can be asked to join a social group and take part in field activities of that group. Another activity is to organize the students to undertake a social task such as feeding the homeless, participating in old age home activities or hygiene activities. They can give their inputs as to how these activities can be made more effective.

Additional Resources
Watch the Unilever film on hand-washing at: https://www.youtube.com/watch?v=izujd5D5NiI
LifeBouy Hand Washing Campaign: https://www.youtube.com/watch?v=YImzLDw7SdM
Indonesian Doctors Perform Hand Washing Dance:
https://www.youtube.com/watch?v=ySe9tvB1OXc
Lifebuoy Hand Washing Campaign Documentary 2012:
https://www.youtube.com/watch?v=EqB-ypnOu4A
Dettol - Give Life a Hand campaign: https://www.youtube.com/watch?v=8unBcuzqJME

Chapter 14 **A Social Marketing Campaign for Healthier Eating Habits in France: VIF and "LES BONNES PORTIONS" Campaign Against Childhood Obesity**

Patricia Gurviez and Sandrine Raffin

Discussion Questions

Question 1
Do you have suggestions to strengthen the preventive actions aimed at the primary and final targets?

Answer 1
The main issue is to focus on current lifestyles to make the target audience willing to achieve behavioral change because they feel that the program takes their psychological or physical needs into account. For the moment, the primary targets have been directly reached through local workshops but parents and children are not reached directly. With the help of the local *ambassadors*, disadvantaged parents could be more directly involved at a community level to share and strengthen the mutual benefits of the desired behavioral change (portion sizes better adapted to their children's needs). Video testimonials could be used on the final targets to reinforce individuals' autonomy and self-efficacy. Making these testimonials could be an opportunity to strengthen a collective sense of sharing. The parents' testimonials could encourage take-up of the desired new social norm by providing evidence of the positive outcomes not only for individuals but also for communities.

Question 2
What other factors might affect childhood obesity and food choice?

Answer 2
Childhood obesity is a multi-component phenomenon and cannot be reduced to food choice alone. Some social marketing programs, for example, have addressed the issue of children's level of physical activity worldwide. Examples include the 2014 "Walk to School" campaign and the long-term Canadian program ParticipACTION (see Kubacki et al., 2015 for a systematic review). In another review, Carins and Rundle-Thiele (2013) found 15 empirical studies from 2000 to 2012 that targeted food behavioral change among children, mostly related to an increase in fruit and vegetable consumption.

Patricia Gurviez, UMR Ingénierie, Procédés Aliments, AgroParisTech, INRA, Université, Paris-Saclay, 91300 Massy France, E-mail: patricia.gurviez@agroparistech.fr
Sandrine Raffin, LinkUp Factory, 92300 Levallois-Perret France, E-mail: sandrine.raffin@linkup-conseil.fr

Question 3
How else might food portions and food choice be targeted?

Answer 3
Bohnert et al. (2011) suggested that involving youths in the design of a portion plate could have a positive impact. Many research studies have also suggested useful tools to reduce overall food intake and increase fruit and vegetable intake, such as using an approach based on short digital text messages (Bauer et al., 2010; Bech-Larsen and Gronhoj, 2013), or offering vegetables in the school lunch line (Mancino and Guthrie, 2009). The nudge approach is becoming very popular both at school and in the home (see DeCosta et al., 2017 and Lycett at al., 2017 for reviews) as a way to foster healthier eating behaviors. Advergames and national school competitions (Horne et al., 1998) can also contribute to the desired behavioral changes, at least in the short term. It is much more difficult to evaluate a long-lasting effect.

Question 4
How can the influential environments be analyzed using a social ecological approach? How can it be adapted to your local scale?

Answer 4
VIF adopts a primarily downstream approach to behavior combined with a social ecological approach. This approach can be adapted to other contexts to reveal relevant influential environments. Students can also be asked to investigate the potential of upstream approaches to fight childhood obesity and overweight among disadvantaged communities
What other health problem related to poverty and the social environment of children can VIF address in its next annual thematic campaign? In line with exchange theory, how can value be jointly created to change the behaviors that lead to negative health outcomes?
In recent years, VIF developed other campaigns related to childhood obesity and overweight prevalence in disadvantaged families, such as its “BIEN DORMIR POUR BIEN GRANDIR” campaign (quality of sleep) or “LE BON RYTHME DES REPAS” with a focus on breakfast and afternoon snacks. For each program, a formative research study based on in-depth interviews and focus groups with the audience facilitates joint value creation for the desired behavioral changes. For example, “time to go to bed” often triggers conflict at home between children and their parents. By providing easy techniques embedded in their way of life, VIF can help parents and children to resolve these daily conflicts.

Key Issues for Focus
VIF’s decision is to focus on making healthy eating habits and physical activities more attractive to families in more deprived areas. Another important decision is in no way targeting childhood obesity in the overall message. There is less emphasis on stigmatizing already obese families or antagonizing better educated families who are concerned—sometimes obsessively—about their children’s weight. The living lab makes it possible to experiment on a small scale before applying the approach to the network of VIF partner towns. These are key elements on which the instructor may wish to focus extra attention. Some approaches, such as the nutritionist approach, may adopt a top-down perspective and be ineffective because the messages are not accepted by those who feel that they threaten their way of life.

In-Class Activities
Students are always keen to work on a new way of promoting an initiative. The instructor may choose one or several thematic initiatives which have been discussed above and ask for a new

poster for a specific target (for example, specific to younger pupils, or girls, or an ethnic target, although this last issue is not permitted by French law)

Out-of-Class Activities

The instructor may ask students, as homework, to examine resources in their own community, utilizing the local services of organizations that parallel those in the case, namely addressing childhood obesity and overweight. The instructor may ask them to compare VIF's methods and principles to these resources. If possible, results can be compared too.

Additional Resources

http://vivonsenforme.org/ (only in French)

Bauer, S., de Niet, J., Timman, R., & Kordy, H. (2010). Enhancement of care through self-monitoring and tailored feedback via text messaging and their use in the treatment of childhood overweight. *Patient Education and Counseling, 79*(3), 315–319.

Bech-Larsen, T., & Gronhoj, A. (2013). Promoting healthy eating to children: A text message (SMS) feedback approach. *International Journal of Consumer Studies*, *37*(3), 250–256.

Bohnert, A. M., Randall, E. T., Tharp, S., & Germann, J. (2011). The development and evaluation of a portion plate for youth: A pilot study. *Journal of Nutrition Education and Behavior, 43*(4), 268–273.

Carins, J. E., & Rundle-Thiele, S. R. (2014). Eating for the better: A social marketing review (2000–2012). *Public Health Nutrition*, *17*(7), 1628-1639.

DeCosta, P., Møller, P., Frøst, M. B., & Olsen, A. (2017). Changing children's eating behaviour - A review of experimental research. *Appetite*, *113*, 327–357.

Horne, P. J., Lowe, C. F., Bowdery, M., & Egerton, C. (1998). The way to healthy eating for children. *British Food Journal*, *100*(3), 133–140.

Kubacki K., Rundle-Thiele, S., Lahtinen, V., & Parkinson, J. (2015). A systematic review assessing the extent of social marketing principle use in interventions targeting children (2000-2014). *Young Consumers*, *16*(2), 141-158.

Lycett, K., Miller, A., Knox, A., Dunn, S., Kerr, J. A., Sung, V., & Wake, M. (2017). "Nudge" interventions for improving children's dietary behaviors in the home: A systematic review. *Obesity Medicine*, *7*, 21–33.

Mancino, L., & Guthrie, J. (2009). When nudging in the lunch line might be a good thing. *Amber Waves*, *7*(1), 32.

Chapter 15 **Smile Train India: A Social Marketing Case Targeting Cleft Palate**

A. Sivakumar

Discussion Questions

Question 1
What behavior change is Smile Train addressing? Does it involve all types of behavior change?

Answer 1
Smile Train is looking at changing 2 behaviors namely: a) Cleft is not a treatable condition and b) is a Behavioral change involves 5 possibilities namely reject, modify, accept, abandon and continue. Smile Train India has attempted behavioral change across several dimensions. The first job is to create awareness about cleft lip and palate as serious social and economic problems, so that prospective donors are aware of this deformity as a serious problem. Another aspect is to change behavior among future parents to look for any deformities in the growing baby. A major behavioral change that they have successfully initiated is to convince adults and parents of children about cleft being a treatable condition. The campaign has created change among the doctors to consider this condition as serious and to volunteer to treat it. Shifting the perception that treating cleft was against god's will and the other superstitions that went along with it is also a great behavioral change that Smile Train has brought in among the Indian public through its campaign.

Behavioral change goes through several stages namely Pre-contemplation, Contemplation, Preparation, Action, and Termination. In the case of Smile Train, adults and parents of children suffering from facial deformity due to cleft would go through these stages. In the absence of interventions, most behavioral change does not happen. Therefore interventions in the initial stages are very crucial. These interventions range from raising consciousness through media campaigns and educational materials to environmental reevaluation i.e., assessing the changes that individuals underwent through the behavioral change through personal stories and relating it to how the social environment has reacted to the same. Smile Train has used all these different interventions to ensure that the target audience shift quickly to the action and termination stage of the behavioral change stages.

Question 2
What Place strategies would you suggest for Smile Train?

Answer 2
The key aspect of Place as a social marketing mix element is to make it easier for cleft patients to adopt cleft surgery as a behavior compared to retaining the status quo. Some of the possibilities for Smile Train are a) to ensure that the clinics and hospitals are close to place where they live, b) extending surgery and consultation services of the surgeons and the other healthcare staff beyond the normal hours, c) make the presence of doctors and cleft screening healthcare personnel near the dwellings of the cleft patients and

A. Sivakumar, VIT Business School, Tamil Nadu, India. E-mail: sivakumar.a@vit.ac.in

d) In the case of children make the ambience in which the treatment is provided appealing so that they are keen to undergo surgery and return for post-operative care with interest and enthusiasm.

Question 3
How does the concept of exchange work in the Smile Train case?

Answer 3
Minimizing costs and maximizing rewards is at the core of exchange theory. According to this theory, all behavior is a series of exchanges. In both cleft surgery and prevention, exchange theory can work very well. The key is to emphasize the minimum efforts required to either undergo surgery or go through tests and avoid actions that can enhance cleft risk. The reduction of financial, physical, and social costs is the key in cleft surgery and prevention. This is achieved through free screening, advice, surgery that is sponsored, and the betterment of the patient's physical condition at the end of it. The social costs come down as facial disfigurement reduces social ostracism. These in the future ensure voluntary adoption of cleft prevention and cleft surgery adoption related behavior compared to the current situation. The reward in this case is better quality of life. Message strategies across media and the various tools used to popularize surgery adoption or prevention need to consider the application of exchange theory.
How do you distinguish nonprofit marketing and social marketing in Smile Train's efforts?
Both these aspects form part of Smile Train's efforts. While the focus is on social marketing i.e., working towards behavioral change through marketing for cleft surgery and prevention, Smile Train also does use promotion like a nonprofit marketer to obtain funding from businesses, in-kind contributions, or other resources from different stakeholders like hospitals, doctors and clinics, schools, etc., to increase awareness and concern about cleft or to support fundraising, participation, or volunteer recruitment for cleft.

In-Class Activities
In the class, the faculty can start with asking whether any student has had a close encounter with somebody with cleft or worked for an organization helping people with cleft. This would help in highlighting the various issues associated with the condition. Later in the class a debate on whether prevention or corrective surgery for cleft is a better way to handle cleft as a problem.

Out-of-Class Activities
Participants of this case discussion could be asked to speak to a cleft patient before the class. In addition, each one of them may be asked to interview a parent with a cleft child or a maxillofacial specialist surgeon to understand the intricacies of cleft.

Additional Resources
Alkire, B. C., Vincent, J. R., & Meara, J. G. (2015). Benefit-Cost Analysis for Selected Surgical Interventions in Low-and Middle-Income Countries. Disease Control Priorities• Third Edition, 361.
Aishwarya Rai Bachchan appeals for Smile Train
https://www.youtube.com/watch?v=xfNYdQsRxYU

Bhattacharya, N. Smile Train partner https://www.youtube.com/watch?v=ykQIuqVK-HM
Smile Train Virtual Surgery Simulator Tutorial
https://www.youtube.com/watch?v=84YU1NQsCWs
Kamdar, A., Levitt, S. D., List, J. A., Mullaney, B., & Syverson, C. (2015). Once and Done: Leveraging Behavioral Economics to Increase Charitable Contributions.
Kulkarni, K. R., Patil, M. R., Shirke, A. M., & Jadhav, S. B. (2013). Perioperative respiratory complications in cleft lip and palate repairs: An audit of 1000 cases under 'Smile Train Project'. *Indian Journal of Anaesthesia*, *57*(6), 562.
Mehta, R. Country Director, Smile Train India
https://www.youtube.com/watch?v=irF2lRjYXAE
Ng-Kamstra, J. S., Riesel, J. N., Arya, S., Weston, B., Kreutzer, T., Meara, J. G., & Shrime, M. G. (2016). Surgical Non-governmental Organizations: Global Surgery's Unknown Nonprofit Sector. *World journal of surgery*, *40*(8), 1823-1841.
Singh, S. K. (2009). Smile Train: The ascendancy of cleft care in India. Indian journal of plastic surgery: official publication of the *Association of Plastic Surgeons of India*, *42*(Suppl), S192.
Smile Train - Our Model https://www.youtube.com/watch?v=yXN5CGlRR4g
Smile Pinki https://www.youtube.com/watch?v=CamEXQ8x72c
Stewart, B. T., Carlson, L., Hatcher, K. W., Sengupta, A., & Vander Burg, R. (2016). Estimate of Unmet Need for Cleft Lip and/or Palate Surgery in India. *JAMA facial plastic surgery*, *18*(5), 354-361.
Thamilselvan, P., Kumar, M. S., Murthy, J., Sharma, M. K., & Kumar, N. R. (2015). Psychosocial issues of parents of children with cleft lip and palate in relation to their behavioral problems. *Journal of Cleft Lip Palate and Craniofacial Anomalies*, *2*(1), 53.

Chapter 16 Using Social Marketing for Large-Scale Health Interventions: The UK's Making Every Contact Count Program

Katherine C. Lafreniere and Andy McArthur

Discussion Questions

Question 1
What can MECC do to further increase the number of healthy chats?

Answer 1
MECC could increase in the number of healthy chats by introducing new incentives, such as contests and games for employees. They could also offer refresher courses and newsletters to keep MECC at the top-of-mind of employees. They might also make the public aware of these as a cost-free resource.

Question 2
The MECC program assumes that front line service staff, if properly trained, have the potential to influence the health behaviors of the wider public. How might they monitor and evaluate this causal relationship?

Answer 2
MECC can start by measuring outputs, such as tracking the number of clients that were exposed to the campaign. They can do so by keeping track of the number of promotional materials that were given away by front line staff (e.g., pamphlets). They can also offer a system for front line staff to record the number of healthy chats they had each shift. Next, MECC can measure the client’s response to healthy chats. For example, they can record how many people followed up with the advice provided in promotional material (e.g., joined the recommended weight-loss program, called a health line, or received a smoking cessation kit). Relatedly, when clients register for recommended programs, staff can ask clients how they heard about the program. Finally, MECC can track overall health and well-being statistics in Salford, such as the average debt, smoking rates, and death rates.

Question 3
How might MECC promote the program to senior management?

Answer 3
Following exchange theory, MECC could ensure the benefits for senior managers outweigh the costs. They could communicate why MECC training is beneficial to the firm’s bottom line. For example, MECC training may increase employee satisfaction and overall health and well-being, which in turn would reduce turnover and sick leave. Customers may also perceive front line staff as being more competent and approachable. MECC could also introduce incentives to function as additional benefits, such as community recognition, awards, and partnerships. Any data that supports the value of the program could be useful in making the case.

Question 4
What can MECC do to expand their program into other cities?

Answer 4
MECC can take advantage of existing social networks, by targeting organizations that have established relationships with organizations that have already completed the program. Word-of-mouth, compared to advertising and selling, is generally perceived as less biased (e.g., Moore 2012), and would therefore encourage buy-in. Additionally, MECC can expand their training program into other cities by offering a digital training platform, wherein front-line staff and managers attend an online course. Such an option would also decrease costs for managers because employees could complete the program outside of regular work hours.

Key Issues for Focus

Monitoring efforts: It is essential to monitor a social marketing campaign in order to identify barriers and take corrective action. The original MECC training program included SAT and took too much time and effort for front line staff members to complete. In accepting feedback about the program, MECC was able to address this barrier and increase satisfaction. How could MECC monitor the quality and quantity of healthy chats?

Training: Discuss the behavior theories that MECC taught front line employees. Why is it important for MECC to include this theoretical component? What other behavior theories should they consider teaching in their training program?

In-Class Activities

Propose another region that would benefit from MECC. Conduct a SWOT analysis for this particular region.

MECC targeted front line staff in industries that have a direct or indirect role in helping their clients or customers change their health and well-being (e.g., nurses). Develop a comprehensive list of the industries that could be targeted by MECC.

Propose a positioning statement for MECC.

Out-of-Class Activities

Find other programs or efforts that monitor and evaluate health and well-being outcomes. Identify measures used in other programs that might be useful for the MECC and discuss how these could be measured by MECC.

Katherine C. Lafreniere, Alberta School of Business, University of Alberta, Edmonton, Canada. Email: klafreni@ualberta.ca
Andy McArthur, Social Marketing Gateway, Glasgow, Scotland, UK. Email:andy@socialmarketinggateway.co.uk

Propose an incentive for front line staff to increase the quality and quantity of healthy chats (e.g., games, contests). Be specific. Remember that you do not want staff to force advice or be put in a difficult situation.

Additional Resources

Campbell, M., & Baker, L. (2014). Research, monitoring, and evaluating VAW social marketing campaigns. Learning Network Brief (17). London, ON: Learning Network, Centre for Research and Education on Violence Against Women and Children. Retrieved from http://www.vawlearningnetwork.ca/social-marketing-public-education

Clark, D. (2015, April 21). How do I know it's working? Monitoring and evaluating your social change marketing campaign. *Huffington Post*. Retrieved from https://www.huffingtonpost.com/dorie-clark/how-do-i-know-its-working_b_984952.html

Deshpande, S., Basil, M. D., & Basil, D. Z. (2009). Factors influencing healthy eating habits among college students: An application of the Health Belief Model. Health Marketing Quarterly, 26, 145-164. Retrieved from https://www.tandfonline.com/doi/full/10.1080/07359680802619834

Katherine C. Lafreniere, Alberta School of Business, University of Alberta, Edmonton, Canada. Email: klafreni@ualberta.ca
Andy McArthur, Social Marketing Gateway, Glasgow, Scotland, UK.
Email:andy@socialmarketinggateway.co.uk

Chapter 17 **Saving Lives Through Lifebuoy's *Help a Child Reach 5* Campaign**

Sonal Kureshi and Sujo Thomas

Introduction

Lifebuoy has been present in the Indian market for over 100 years. This case discusses the social marketing campaign of Lifebuoy carried out in the Indian market. It discusses the *Help a Child Reach 5* campaign which originated in India and is now being run in several countries. It describes in detail the environment which led to the initiation of the campaign, the background of past Lifebuoy efforts, target audience addressed, and the positioning and communication strategy in India. It also mentions the challenges that the company could face while achieving its objectives. The case briefly draws attention to the strengths, weaknesses, opportunities, and threats that are faced by the company. Additionally, the case provides details about the campaign evaluation and lessons learned from the experience.

Discussion Questions

Question 1
Evaluate the campaign in light of the objectives of the company.

> Answer 1
> The instructor can start the case discussion by posing this question. It is important for the students to be able to appreciate the key strengths and weaknesses of the campaign. Students need to specify each activity and try to justify how they help in achieving which objective and the outcome.
>
> Creating Awareness: The brand has been successful in generating awareness about hand-washing in the villages which it had adopted. This can be assessed from the data about the number of people who had inculcated the habit of washing hands with soap. Also, creating awareness about the problem had been achieved as evident from the views and shares of the videos of the advertisement.
>
> Attitude and behavior: The company projects that 21 days of hand-washing would result in a permanent change in the habit. There is some evidence which indicates that behavior does change but only time can tell if the attitude has truly changed when the intervention by the brand stops. The visual charts, monitoring sheets for the children, teacher reminders, and health worker and volunteer involvement were appropriate for acting as reminders for hand-washing with soap resulting in a positive behavior.

Question 2
Should this social marketing campaign be continued and extended? If yes, please justify and suggest suitable changes.

Sonal Kureshi, Indian Institute of Management Ahmedabad. Ahmedabad, India. Email: sonalk@iima.ac.in
Sujo Thomas, Ahmedabad University, Ahmedabad, India. Email: sujo.thomas@ahduni.edu.in.

Answer 2
It would be useful for the brand to continue the campaign and expand it to other villages. This should be done as this campaign was in synergy with the overall objective of the company. In order to sustain this activity, the main influencers need to be motivated to continue the efforts even after the initial phase. Lifebuoy could further use village fairs to promote hand-washing through some fun activities.

Question 3
Do you think the promotional activities are effective for the given target audience?

Answer 3
Overall the target audience is well covered by different elements of the campaign. The main "touch point" were homes, schools, and health centers. At each of these touch points villagers, school management, teachers and students, and local health communities were involved through different activities.

Question 4
Suggest if any other target audience could be approached by the company for better results?

Answer 4
Village spoke persons, religious heads, and places of worship could be considered as an option for target audience.

Question 5
What are the changes, if any, that you recommend in the message strategy keeping in mind the campaign objective and the overall marketing objective?

Answer 5
The current message strategy does not need much change as it is effective in achieving the campaign as well as the overall marketing objective. There are two changes which could be considered for future. Firstly, the brand name needs to appear in the ad film even at the start of the film. In a three-minute video, why leave the appearance of brand name only towards the end? It would be useful to have the logo or brand name at the side corner all through the film. Secondly, Lifebuoy brand could rejuvenate itself by shifting from emotional appeal to sustain interest in the campaign.

Key Issues for Discussions

The main objective of the case is to highlight the details and evaluate the Lifebuoy's Help a Child Reach 5 campaign in India. The case provides an opportunity to understand different aspects of the campaign and the activities that were carried out by HUL (Parent Company). It also briefly discusses the appropriateness of the campaign in view of the overall global vision and mission of the company. The case can be used to discuss how an integrated communication strategy of the company can be beneficial in the long run. The case will also help students familiarize themselves with the tasks and challenges that must be faced during the implementation of a campaign.

By the end of the session discussing the case, the student would be able to:

- develop an understanding of activities carried out as a part of the campaign and further relate it to the overall objective;

- describe important issues relating to the importance of target audience fit with the activities undertaken;
- think about how to evaluate and measure the effectiveness of the campaign; and
- ponder over the challenges in running such large-scale campaigns and discuss possible solutions to tackle these challenges.

The class can be started by the instructor by briefly discussing social marketing and its objectives with few examples. Some points of discussion could be:
Students should be asked to shortly explain key aspects about the campaign.
Strengths and weakness of the current campaign versus the competitors.
Critique the different activities under taken by the brand.
Measures of evaluating the campaign need to be discussed.
How new technology and platforms of communication can be adopted for better results.
Discussion and learnings for social marketing.

In-Class Activities

The students could be given a brief before the class as a group exercise. The brief should state the objective of a social campaign and the potential target audience. They should be asked to prepare a campaign and present the same in the class.

Out-of-Class Activities

Prepare the social campaign based on the brief given as a part of the group exercise. Add the inputs from their interactions with at least 5 people.

Position in the Course

The case is suitable for both promotion module of a core marketing management course as well as for a specialization marketing communication course.

Additional Resources

Bloom, P. N., & Novelli, W. D. (1981). Problems and challenges in social marketing. *The Journal of Marketing*, 79-88.
Lee, N. R., & Kotler, P. (2011). *Social marketing: Influencing behaviors for good*. Sage.
Lifebuoy Help A Child Reach 5 – Gondappa
https://www.youtube.com/watch?v=UF7oU_YSbBQ
Lifebuoy Help A Child Reach 5 – Chamki https://www.youtube.com/watch?v=VsnP_6kdtD

Chapter 18 Nestlé *Healthy Kids Programme* in India: Social Marketing Aiming Behavioral Change and Nutrition Education for Teenagers

Andrei Tiganas, Anamaria Boghean and José Luis Vázquez

Discussion Questions

We can assume that the company conducted advocacy initiatives before closing any partnership with the Government representatives.

By any measure, the collaboration with a nutrition company like Nestlé is valuable for public institutions since they can take advantage of Nestlé image and expertise in nutrition to promote their own programs.

Here are some of the topics that need further analysis considering that the outcome of the HKP campaign was not publicly communicated:

How did the program impact Indian teenagers at national level? I.e., how many teenagers changed their eating behavior?
Which is the evolution of nutrition-related diseases in the Indian areas covered by HKP?
How healthy today are the young women who were part of the program?
What programs with similar goals are conducted by the Indian Government in the same areas as HKP? It would be interesting to analyze the wellbeing of the community that took part in both of these initiatives.

So far it seems that HKP has not enough visibility in the media. Why does a company with the marketing expertise and budget such as Nestlé spent so little focus on media coverage?

These answers are not exhaustive. Students should be encouraged to find as many and as various answers as possible.

Question 1
Which are the benefits of the campaign for the target audience (including the sub-groups)?

> Answer 1
> The benefits of the campaign are: knowledge on what is a healthy meal and its impact on health; children know how to distinguish between healthy and unhealthy food; children are aware of the way that junk food impacts their health; the self-esteem of teenage girls grows; etc.
>
> Parents are more aware of how they should feed their children. They also pay more attention to teenage girls in terms of nutritional needs.

Andrei Tiganas, International Advertising Association of Young Professionals Cluj-Napoca - IAA Young Professionals Cluj, Romania. E-mail: contact@andreitiganas.ro
Anamaria Boghean, International Advertising Association of Young Professionals Cluj-Napoca - IAA Young Professionals Cluj, Romania. Email: anamaria.boghean@gmail.com
José Luis Vázquez, University of León, Leon, Spain. E-mail: jose-luis.vazquez@unileon.es

Teachers are able to advise both children and parents on healthy eating habits. At the same time, they are more aware of their own diet.

HKP brings together children, parents, and teachers in some of the activities, so their relationship improves.

Question 2
What is the expected long-term impact of the program and how can it be monitored?

Answer 2
The expected long-term impact of the program is a decrease in nutrition-related diseases. It can be monitored by running research studies in partnership with research teams within Indian universities.

Another aspect of the long-term impact concerns education. Children are well-fed, so they are more focused during classes. This way, their school results improve.

School drop-outs decrease due to the fact that teenagers get a better quality of life and that parents get more involved in their education.

Question 3
How can the workshop facilitators make the sessions appealing for teenagers, in order to attract them and make them adopt a positive behavior?

Answer 3
The facilitators should use interactive activities, based on games, storytelling, outdoor sessions, and Service Learning projects (components of the experiential learning method).

Question 4
Time is the highest cost for the students and also for their families. Since this is a threat for the program, how can Nestlé cope with this challenge?

Answer 4
The more interactive and funny the workshops are, the greater the chances to overcome the challenge of time. Children will prefer coming to these workshops than doing other activities.

Question 5
What is the public utility of the program?

Answer 5
The public utility of the program is tightly connected to better health among Indian citizens. Healthy people are happier, more productive at work, and they can educate their children on healthy lifestyle.

Question 6
“Over the next 10 years, Nestlé will slowly move from packaged food, to focus on health and nutrition products” (Mitra 2017). Is such a decision sustainable in the long run?

Answer 6

It is sustainable in the long run because of trends in the food industry showing an increased demand for healthier products. Indeed, people pay more and more attention to their food and to the environment.

Question 7
Will the company give up to less healthy products, in order to position itself as the leader in nutrition in India?

Answer 7
Probably not, since there will always be a demand for these kinds of products. But it could increase its efforts towards promoting a healthy lifestyle through new product development and CSR initiatives.

Question 8
How will the company reconcile its "responsible" image with proofs regarding its unethical activities?

Answer 8
Nestlé has a very good PR department which will do its best to communicate in a way the company is the less affected. Its financial strength allows Nestlé to invest massively in communication strategies so that the image of the company remains clean. The company can also communicate more about its CSR programs in order to increase the brand's capital.

Nestlé could also start implementing procedures for all their stakeholders (suppliers, partners, employees, etc.) and make sure they are respected. The company could also partner with NGOs dealing with ethical issues, which could help the company set up action plans that would decrease its negative impact on society.

Key Issues for Focus

1. Innovation for social good. Innovation is a must for every company, because it helps maintain/gain a competitive advantage and increase the profit margin. What happens when innovation is used not only for a commercial purpose, but also for a social one?
2. Discuss how Nestlé is innovating, and what are the benefits for the Indian target audience and more generally, for society?
3. Accessibility of the campaign. Accessibility is important as more people can benefit from it, especially those who are underprivileged (people living in remote/ rural areas, children that don't go to school, etc.) Nestlé is conducting the campaign in the areas around its 8 factories, including rural areas.
4. Discuss how important it is to include these sub-groups in the target audience and which could be the outcomes of an HKP campaign for teens that don't go to school. Are there other potential sub-groups that could benefit from this campaign? How?
5. Targeting teenage girls. Communicating with teenage girls is important as girls in India don't have the same educational opportunities as boys do. Plus, they have certain nutrition requirements in this phase when they are becoming adults. Moreover, they will be future mothers, so they will be responsible for their children's and family's nutrition.
6. Discuss how the behavior change among girls can influence the health of the society.
7. Preference of junk food over traditional, home cooked food for the Indian children. (University of Maryland School of Public Health, Science News 2018)(Logo recognition associated with kids' choice of international junk foods https://www.sciencedaily.com/releases/2018/03/180306115737.htm)

8. Discuss the obstacles that HKP campaign could have in this context and how it can be addressed.
9. Looking ahead. If the campaign reaches its goals, there will be an increase in the consumption of healthy products—which Nestlé is developing. Since 2017 the company has been running the Nestlé Food Safety Institute (NFSI) which aims at aims to launch more nutritious foods and beverages that might satisfy the growing demand for safe and healthy food. (Nyoooz, 2017)(https://www.nyoooz.com/news/gurgaon/910845/nestle-launches-food-safety-institute-in-india-in-association-with-fssai/)
10. Discuss how Nestlé's product portfolio will be developed in 5 years? Will the healthy products take over the less healthy ones, taking into account that these last ones are the "cash-cows" of the company?
11. Partnerships. Discuss the importance of local partners and how are they helping the company adapt its activities within the campaign. What other partnerships can be developed?
12. Social marketing for good or for profit? Discuss which is the company's (real) motivation to initiate social marketing campaigns: profit or social good? You can also discuss the company's slogan "Creating Shared Value".
13. The ethics of marketing communication targeted to children.
14. Discuss Nestlé communication policy towards children. How ethical is to have children as advertising target for unhealthy food products?

In-Class Activities

The importance of the debrief.
Both in the in-class and out-of- class activities, the reflection moment is crucial for the learning process.
The reflection is facilitated by the teacher and helps students recognize and clarify what they have learned from the case study. Also, it is the opportunity for them to reflect on transferring the concepts, ideas and learnings into their own reality. i.e., talking about the importance of a equilibrated diet promoted by Nestlé, you can transfer the discussion towards the students reality.
We encourage teachers to facilitate the discussions and activities following the Experiential Learning Cycle (Kolb, 1984)(David L, "Experiential Learning (Kolb)," in *Learning Theories*, February 13, 2007, https://www.learning-theories.com/experiential-learning-kolb.html)

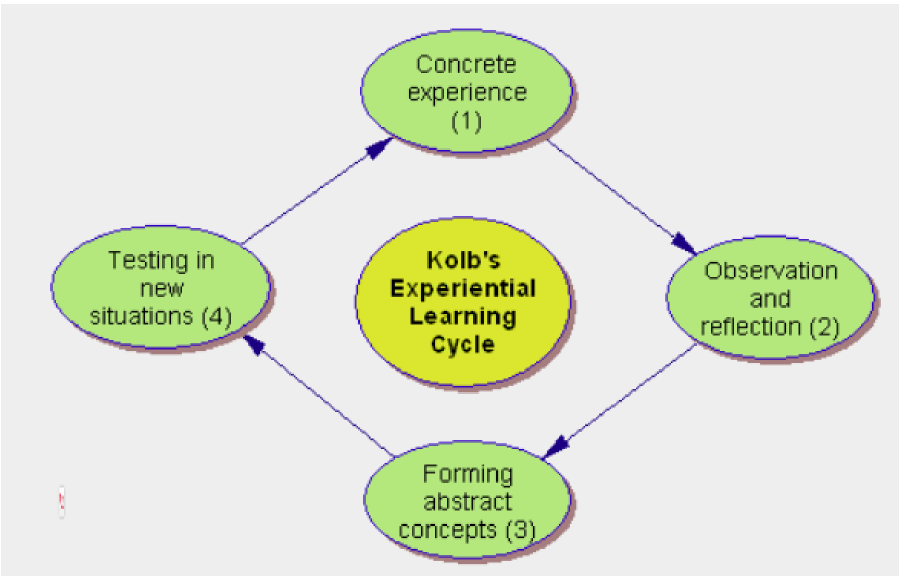

Fig. 18.1 Kolb's Experiential Learning Cycle (1984) Source: www.learning-theories.com

Role play
Imagine an activity during an HKP workshop in a class. Divide the students in 2 groups: the students and the trainers. Let's say 2/3rds of the students prefer junk food (you could even give them some sweets to put on their desks). The goal of the trainers is to convince all the students that healthy food is better for them. Both teams should bring arguments. At the end, facilitate the debrief following the Experiential Learning Cycle.

Possible questions:
What did you have to do? How did you feel?
Did the trainers convince all the students? Why/ why not?
In real life, what are your eating habits?
Would you attend a workshop like the one proposed by Nestlé? What would make you attend such a workshop?
What did you learn from this activity? How exactly can you improve your eating habits?

Invite an expert
Invite an expert for a discussion with the class. The expert can be a food company's Innovation/ Marketing/Food Safety Representative, a government representative responsible for regulation in the food industry, a nutrition expert, etc. Prepare both the students and the speaker before the meeting. Make sure students have questions for the expert. Set the learning goals together with the expert and make sure he/she uses clear, not too scientific language.

Out-of-Class Activities

a. Research on the teens eating habits in your country/region.
b. Research on similar awareness campaigns in your community/country.
c. Watch TED Talks like Jamie Oliver one's on "Teach every child about food"
d. Study visit in an innovative food company in your community.
e. Interview some experts in your community on the nutrition education topic. Let the students identify these experts, set that the learning goals (what do you want to learn?), contact the experts, arrange the meeting. Share in the classroom/online the learning outcomes (Reflection and Transfer).
f. Design a social marketing campaign aiming to raise awareness of a healthy lifestyle within your community (school, neighborhood, city, country). Read more about Using Social Marketing to Plan a Nutrition Education Program Targeting Teens here: https://joe.org/joe/2003december/a4.php
g. Implement a Service Learning project. Even if it is more complex and on a longer term, the students have the opportunity to learn by implementing a project with an impact in their communities. For example, they could organize training on nutrition for their colleagues, parents, or teachers. More about Service Learning method here: https://cft.vanderbilt.edu/guides-sub-pages/teaching-through-community-engagement/
h. Some example of activities students can do can be found here: http://www.fraserhealth.ca/media/BeyondFastFoods.pdf

Additional Resources

Social Marketing Campaigns and Children's Media Use (Future of Children, 2008) https://eric.ed.gov/?id=EJ795863
A youth-led social marketing intervention to encourage healthy lifestyles, the EYTO (European Youth Tackling Obesity) project: a cluster randomized controlled trial in Catalonia, Spain

(BMC (BMC Public Health, 2015)
https://bmcpublichealth.biomedcentral.com/articles/10.1186/s12889-015-1920-1
Food and Mood: Teen Nutrition and Mental Health (Newport Academy, 2017)
https://www.newportacademy.com/resources/empowering-teens/food-mood-nutrition-teen-mental-health/
What Sugar is Really Doing to Your Brain and Body (Newport Academy, 2017)
https://www.newportacademy.com/resources/well-being/what-sugar-is-really-doing-to-your-brain-and-body/
Adolescent Food Habits (Nestlé)
https://www.nestle.com.au/nhw/nutrition-for-everyone/familylife/adolescentfoodhabits
Example of social marketing campaigns promoting nutrition education
http://health.mo.gov/data/interventionmica/Nutrition/CampaignsandPromotions/index_3.html

Chapter 19 **Hand-Washing With Soap for a Healthier Vietnam**

Hoang Minh Doan and V. Dao Truong

Discussion Questions

Question 1
Evaluate the campaign's targeting and positioning strategy.

Answer 1
Given the size of the segment, the readiness to engage in behavior change and the potential long-term impact, targeting children at elementary school age seemed a reasonable choice from both the marketing and social perspectives. This audience was also easily reached, given support from the Ministry of Education and Training which was a key partner.

Embracing children's parents as a second group of the target audience was also appropriate in terms of planning strategies and tactics in an integrative manner. It also helped save resources. A potential drawback of this choice might be that, given children of this age, parents are in the busiest stage of their lives with the priority being bringing home enough to survive on. Lack of time could be a reason for their non-participation, particularly those in rural areas.

With respect to positioning, the association of hand-washing with soap with the image of a hero, together with group affiliation and fun games, would work well with young children of school age and appeal to them. However, the proposed value to parents seemed unclearly defined and thus might need to demonstrate a stronger focus.

Question 2
How were the barriers to behavior change in the target audience addressed? How do you evaluate the effectiveness of the price element in this campaign?

Answer 2
The first barrier, the misperception of water-only hand-washing as being sufficient, could be addressed by information provided through comic handbooks, music videos and songs showing the steps of proper hand-washing, and computer games.

The cost of buying soap as a potential barrier could be partially removed with free distribution of Lifebuoy soap to begin with, but it remains unsolved in the long run.

The most important challenge would be the poor sanitary conditions in rural schools and houses, including water supply and facilities. These obstacles would require interventions by and funding from local authorities and governmental and international organizations. Although the MOH and Ministry of Education and Training were project partners, there was no information about their actual engagement and duties over the course of the project.

Hoang Minh Doan, Department of Marketing, National Economics University, Hanoi, Vietnam. Email: dhminhmkt@gmail.com
V. Dao Truong, School of Tourism and Hotel Management, North-West University, Potchefstroom, South Africa. Email: vabdao83@yahoo.co.uk.

Although time was reported as a barrier confronting parents teaching their children how to wash hands properly, there was no clarification about how this element could be addressed.

The VND45,000 (US$2) *Clean Hands Toolkit* appeared inadequate to mitigate local parents' financial cost of adopting the proposed behavior. Although their purchase of this product would permit soap to be provided for free, it was not clear whether rural children actually received it.

In addition, the entertaining computer game may appeal to many children, but it might not be accessible to those in rural regions whose parents still perceived soap's cost as expensive.

In summary, whereas the product, place, and promotion elements were quite sophisticated, the price element (i.e., the cost of soap to parents) seemed not as effective as was expected.

Question 3
What would you recommend to enhance the campaign's effectiveness?

Answer 3
From the above discussion, you could suggest a number of changes in:
value selection and project positioning to appeal to parents,
product elements that are more accessible to the target audience,
effective pricing decisions to address cost perception of the target audience (financial and non-financial costs), partnership and policy initiatives to address barriers and ensure sustainable behaviour change.

Key Issues for Focus

The instructor may want to pay some extra attention to two key issues that emerge from this case study. The first involves the use of communication to disseminate the campaign message to the target audience. As noted, this campaign focused on regions including remote rural ones that had poor sanitation conditions and high levels of gastrointestinal infections. It is likely that many local families live a difficult life, raising doubt about whether the developed computer game was appropriate and able to reach them, given that they might not own a computer or laptop. The instructor may then require the class to discuss the importance of formative research (Kubacki & Rundle-Thiele, 2017) (which was missing in this campaign) to guide campaign intervention. He/she may also ask the class to discuss potential alternatives to the computer game so that the campaign message could reach the target audience and the general public at large.

The second issue refers to the way(s) the campaign outcomes were measured and reported. It can be seen from the case study that the campaign measured its intervention effectiveness in terms of geographical coverage (how many provinces/cities/districts were reached). This does not necessarily mean that members of the target audience actually washed their hands with the free soap they received. Even if many or all of them actually did so at the five recommended critical times, doubt may be cast on whether they maintained such behavior after the project ended and no more free soap was distributed. In other words, this involves the maintenance/sustainability of the promoted behavior. The instructor thus may request the class to discuss this issue and relate it to the broader social marketing field where outcome evaluations have often been made with respect to, for example, the number of posters, films, or advertisements that have been published or aired instead of actual behavior change in the target audience (Truong, 2014).

In-Class Activities

The instructor may consider bringing along a soap bar to his/her class. He/she could then ask the class about their favorite soap brand(s), for what purpose(s) and how often they use the soap, and what they think washing hands with soap may bring to their health. The instructor might then refer the class to the prevalence of many diseases that can be prevented by simply washing hands with soap at critical times but that remain common in many parts of the world, particularly the less developed countries. The instructor may also show a video of the diseases that may result from washing hands with only water and then introduce the class to the case study. Some exemplary videos can be found in the following links:
https://www.youtube.com/watch?v=YBGsoimPXZg
https://www.youtube.com/watch?v=SoEqGhCnPp0
https://www.youtube.com/watch?v=RKmpmOVxNck

Out-of-Class Activities

The instructor may ask his or her class to look for background information about Vietnam as well as the prevalence of diseases related to personal hygiene, clean water, and sanitation such as diarrhea, hepatitis, and helminthic infections in the country (or in their home country) and present in the class what they have found. They could be required to explain potential preventive measures that are not necessarily limited to behavioral change in residents but may embrace policy making as well. The instructor may, along with the class, discuss the similarities as well as differences between Vietnam and the students' home countries. The instructor may also request her or his students to search for similar campaigns that sought to promote hand-washing with soap in Vietnam (some are already noted in the case study analysis) and elsewhere, and to present as well as discuss what they have found. They may also be encouraged to critique such campaigns.

Additional Resources

- On social marketing and social change blog by Craig Lefebvre:
http://socialmarketing.blogs.com
- The World Bank's hand-washing with soap projects:
http://documents.worldbank.org/curated/en/850461468139775956/Handwashing-with-soap-two-paths-to-national-scale-programs-lessons-from-the-field-Vietnam-and-Indonesia.
- UNICEF's work in Vietnam involving water and sanitation:
https://www.unicef.org/vietnam/media_19725.html

References

Kubacki, K., & Rundle-Thiele, S. (Eds.) (2017). *Formative research in social marketing*. Singapore: Springer.
Truong, V.D. (2014). Social marketing: A systematic review of research 1998-2012. *Social Marketing Quarterly*, *20*(1), 15-34.

Teaching Guides for Environmental Protection Cases

Chapter 20 BEST Bicycle Valet: Using Social Marketing to Increase Bicycle Ridership to Major Events in Vancouver, Canada

Katherine C. Lafreniere and Debra Z. Basil

Discussion Questions

Question 1
What can BEST do to further increase the number of patrons using the valet service at each event?

Answer 1
Potential answers: (1) Target local businesses who are likely to be impacted by traffic. Encourage them to hang signs about the Bicycle Valet. (2) Seek sponsorship for ads at bus stops, since bus riders may also be bike riders. (3) Do further audience research to discover why someone would NOT choose this option, then address the issues identified (e.g., if they say “don’t want to get sweaty” consider offering freshen-up towelettes and possibly a small booth for changing into fresh clothing.) The importance of this response is that further research can help to identify target audience concerns that may have been missed.

Question 2
What are some other ways for BEST to benefit third-party sponsors?

Answer 2
BEST can benefit third-party sponsors by encouraging them to promote their support publicly as a social- and environmental-responsibility effort. Consumers expect companies to be socially and environmentally responsible. This effort can help sponsors to gain credibility in the eyes of the public.

Question 3
Where might a similar valet service be successful or unsuccessful?

Answer 3
A service such as this might also be successful in the downtown business district, depending upon the city’s downtown bike lanes. Anywhere that a large group of relatively healthy people congregate, and parking is difficult, could be a potential opportunity. A small booth where patrons can “freshen up” might be particularly desired for a work commute. To be successful the service must be able to locate sufficiently close to a high-density area of office workers.

Question 4
What types of events should BEST target?

Katherine C. Lafreniere, Alberta School of Business, University of Alberta, Edmonton, Canada. Email: klafreni@ualberta.ca
Debra Z. Basil, Dhillon School of Business, University of Lethbridge, Lethbridge, Canada. Email: debra.basil@uleth.ca

Answer 4
The Bicycle Valet will be successful with groups whose patrons ride bikes. A sizable proportion of the patrons should be physically active. Additionally, daytime events are better suited to bicycling.

Key Issues for Focus

1. Upstream/midstream/downstream targets: The idea that different target groups should be addressed differently is very important. It is essential to consider the "upstream" aspects of social change, which help to ensure that the infrastructure is in place to facilitate the desired behavioural change. In this case, event patrons cannot easily ride their bikes to the event without a safe place to park them (since Vancouver has an exceedingly high rate of bike theft). Structural change is needed (a bike corral) to keep their bikes safe during events.
2. Financing social change efforts: Discuss where the funding comes from for The Bicycle Valet. Are there other potential sources of funding that the organization should consider?
3. Research: Discuss the research that was conducted (e.g., examining the San Francisco effort). What other research does or did BEST engage in? What other research should they consider?

In-Class Activities

1. Identify other ways of evaluating program success (e.g., length of time it takes a patron to check in or out).
2. Identify another midstream or upstream target audience (e.g., local businesses who wish to reduce traffic congestion during events). How would you position an effort to target this group?

Out-of-Class Activities

1. Find other programs or efforts that seek to increase bike ridership. Compare and contrast with The Bicycle Valet. Identify components used in other programs that might be useful for The Bicycle Valet and discuss how these could be adapted and successfully incorporated.
2. Propose alternative means of promoting The Bicycle Valet. Be specific. Give detail and begin developing the promotional effort.

Additional Resources

CEPSM (2016, February 2). *Importance of upstream social marketing*. Retrieved from https://cepsm.ca/blog/importance-of-upstream-social-marketing/

Science Direct (2018). *Self-efficacy*. Elsevier, B. V. Downloaded from https://www.sciencedirect.com/topics/neuroscience/self-efficacy

Wymer, W. (2011). Developing more effective social marketing strategies. *Journal of Social Marketing*, *1*(1), 17-31. DOI 10.1108/20426761111104400. Retrieved from https://www.researchgate.net/publication/241206335_Developing_More_Effective_Social_Marketing_Strategies

Chapter 21 **Akureyri on the Verge: Carbon Neutral and Beyond**

G. Scott Erickson

Introduction
The core of the case is the focus on segmentation as one of the social marketer's key tools, not only for broad divisions but even down to customized solutions for targeted individuals and organizations. To illustrate and generate discussion, instructors may want to use the Rare Pride (Boss 2006) reading along with the website which always has a wealth of great material. Each location really does get a different solution, often illustrated in videos (Abaco, Bahamas is usually a favorite in class).

Once segmentation is established as the key, other aspects of the case such as social networks, personal relationships, and person-to-person communication kind of fall into place.

Discussion Questions

Question 1
The segments/social networks in Akureyri are not that dissimilar to one another. How might this type of approach need to change in an environment with markedly different segments? What do you think needs to be done in the US, given the *Six Americas* results?

> Answer 1
> In transferring the approach to a more diverse set of segments, even more drastic differences would have to be created in the marketing mixes. In the US, a lot of the marketing effort and marketing communications related to sustainability is aimed at the "Alarmed". To persuade segments less convinced about climate change, less willing to act, less willing to sacrifice, and with social norms in line with those tendencies, different approaches are required. Indeed, at the "Dismissive" end of the continuum, the social norms would be climate change denial. The further away from the true believers, the lower would be the perceived benefits, the higher the perceived costs, and the less in line with social norms. Social marketing mixes should be reconfigured to address the different segments.

Question 2
Why would a wider range of solutions be attractive as an offering? A particular target can only choose one, so why does diversity matter?

> Answer 2
> Even within a given segment, different individuals have different needs and preferences. Some may be more focused on capital expense, some on operating expenses. Energy choices will have different ranges/capacities, more or less convenient filling/charging stations, reliability, or other aspects that an individual or business may care about. With more options, not only can a target make the best choice for their situation but will also feel in control of the process (the voluntary choice we usually look for in social marketing applications).

Question 3
What other social marketing applications might be ripe for a social norming approach?

G. Scott Erickson, School of Business, Ithaca College, Ithaca, USA. E-mail: gerickson@ithaca.edu

Answer 3
Any number of answers would do. Some well-known examples in the literature include anti-smoking, recycling, and drunk driving. Instructors may also want to bring in other cases from the text.

A couple of interesting ones from the literature in the case might prove useful. Jeff Jordan's agency Rescue (http://rescueagency.com/) does a lot of work related to young people, so students often identify with him. He usually has multiple videos available either on the website or on Youtube. He is one of the coauthors cited for the "hipster" anti-smoking campaign, specifically about changing the social norm in a targeted segment.

Similarly, the Rothschild, et.al. citation refers to a rural Wisconsin anti-drunk driving initiative that's extremely interesting in terms of the depth of data collected on the young men (mainly) in the target audience and the behavior expectations.

Question 4
How would a sense of self-sacrifice enhance an individual's standing in a social network? How would it impact their standing and persuasiveness with others in the network? Why might it be particularly important for centroids or boundary spanners?

Answer 4
If you are going to ask someone else to bear a cost, you're a lot more persuasive if you've demonstrated a willingness to do it yourself. Preaching that others should do something you're unwilling to do is unconvincing. In this case, it's a matter of leadership in which the key players lead by example. As centroids, it's a way to establish communication across the segments, showing understanding for what the targets will need to bear in order to undertake the requested behavior. If the centroids have experienced a cost, even if different, it is still a way to connect within the multiple social networks to which they may belong.

Question 5
Given what you know about different marketing communication approaches, why is one-to-one communication so effective in this kind of application?

Answer 5
In standard marketing, we know that personal selling is the most customized and persuasive of the communication options (vs. advertising, sales promotion/brand activation, and publicity). This is true not only because it's one-on-one but also because it can be customized, including mid-presentation, in a way mass market communication can't match. Digital media has some of the one-on-one capabilities but isn't face-to-face and can lack sincerity. Customized communications can show empathy and understanding for the target.

Chapter 22 **Vancouver Aquarium and World Wildlife Foundation's Great Canadian Shoreline Cleanup: Increasing Volunteerism by Targeting Social Networks**

Katherine C. Lafreniere and Michael D. Basil

Discussion Questions

Question 1
What *exchange* is offered to participants?

> Answer 1
> This is probably a means of feeling they have done something valuable, helped the environment, and enjoying hanging out with friends in the process. Ideally, participants would even have some fun in the process.

Question 2
How could recruitment be improved?

> Answer 2
> A broader appeal, making more use of mass media (PSAs) and social media could be used to make more people aware of the cleanup and could get more people participating. In a more targeted sense, a more formalized recruitment of group participation, such as some sort of company-based effort, either as a competition or the use of company time for volunteering, could also increase participation. Also, carrying forward the list of individual participants and companies that participated in previous years could be a good starting point to recruit from and used to expand on. Providing the supplies to volunteers instead of asking them to purchase their own might remove some barriers to participation.

Question 3
In some urban areas, there are more volunteers than shorelines that can be cleaned up. What sorts of opportunities could this provide for expanding the program?

> Answer 3
> This is an opportunity to get people to clean up litter from a larger variety of locations than just the shorelines targeted by the original Shoreline Cleanup efforts and Vancouver Aquarium's Great Canadian Shoreline Cleanup. One limitation here, of course, is the name "Shoreline Cleanup", and although expanding the program beyond waterways makes it possible to tap into the large population in urban centers, there is a risk of losing the basic focus of the shoreline cleanup.

Question 4
How else would you suggest improving this social marketing effort?

Katherine C. Lafreniere, Alberta School of Business, University of Alberta, Edmonton, Canada. Email: klafreni@ualberta.ca
Michael D. Basil, Dhillon School of Business, University of Lethbridge, Lethbridge, Canada. E-mail: michael.basil@uleth.ca

Answer 4

Primarily I would suggest continued focus on recruiting more widely. Promoting the Shoreline Cleanup in advance via the media and work groups could increase awareness and participation. Formalizing the incentives for the individuals who recruit the most volunteers, the largest groups, the groups that collect the most garbage, etc., could engage the competitive nature of some participants. Also, some form of formal recognition might encourage companies, who are frequently looking to identify themselves as "green". These efforts could enhance recruitment and make the challenge more fun. The competition could also result in fundraising efforts for donations and prizes that would raise funds and increase contact with the business community. Finally, the difficulty in providing cleanup materials such as gloves and plastic bags to volunteers could provide sponsorship opportunities for some companies, especially those who make gloves and plastic bags. Formal acknowledgement of their sponsorship on materials and on the Shoreline Cleanup ad on Vancouver Aquarium's website could encourage and reward their participation.

Question 5

What would the advantages and disadvantages be of extending the time frame for the program outside of the initial month of September?

Answer 5

Obviously moving the effort beyond September would make it possible for the cleanup to happen more often. The advantages are that this could result in more participants (at least per year), which would allow more litter to be collected, and result in cleaner shores. The disadvantages of moving beyond September are that it could detract from the focus of the International Coastal Cleanup Ocean and ties to that international effort and stories, and the risk of running afoul of the original sponsor, the Ocean Conservancy.

Question 6

What forms of evaluation would be helpful? How could these be done? Explain.

Answer 6

As it currently stands it appears the main focus is in examining what is collected, which the GCSC used tally forms for, but found difficult to get volunteers to fill out. But it would be possible to have a more thorough evaluation that could include (1) a content analysis of media coverage (such as PR impressions), (2) a count of the number of followers on social media and the number of clicks of people looking into the cleanup, (3) a count of the number of volunteers that sign up, (4) the number of people who actually participate, (5) the total weight of garbage collected, and maybe even (6) an estimate of the overall level of litter in these coastal areas which could be done by other volunteers or Vancouver Aquarium employees, since clean-up volunteers did not seem to be eager to do.

Key Issues for Focus

The difficulty of relying on volunteers and how to encourage that is worthy of attention. Another topic is the possibility of developing partnerships. Finally, the notion of moving away from an effort's initial focus and the risk of losing that focus and offending the initial organizers and volunteers would be worthy of discussion.

In-Class Activities

Brainstorming solutions to the issues raised above could provide a good in-class activity. A more structured focus on a particular problem such as encouraging media coverage, volunteers, or business participation and sponsorship opportunities could focus them for 15 or 20 minutes.

Out-of-Class Activities

Examining how other volunteer organizations recruit volunteers and how they reward them would provide a good out-of-class activity. Thinking about what other incentives could be provided to volunteers would be a good addition.

Additional Resources

Basil, D. Z., Runte, M. S., Easwaramoorthy, M., & Barr, C. (2009). Company support for employee volunteering: A national survey of companies in Canada. *Journal of Business Ethics*, *85*(2), 387-398.

Miles, I., Sullivan, W. C., & Kuo, F. E. (1998). Ecological restoration volunteers: the benefits of participation. *Urban Ecosystems*, *2*(1), 27-41.

Peterson, D. K. (2004). Benefits of participation in corporate volunteer programs: employees' perceptions. *Personnel Review*, *33*(6), 615-627.

Chapter 23 **A Community-Based Social Marketing Anti-Littering Campaign: Be the Street You Want to See**

Mine Üçok Hughes, Will McConell and Stephen Groner

Discussion Questions

Question 1
Find other anti-littering campaigns. Analyze what type of approach they use. Do they use an informational approach to educate people? Do they use a fun approach to entertain to change behavior? In your opinion, which approach is more effective? Discuss why.

> Answer 1
> The answer to this question will be different based on the campaigns student choose. Fun theory (www.thefuntheory.com) uses a fun approach to change behavior. Consumers are encouraged to dispose of their recyclable bottles and cans in recycling bins that resemble an arcade machine. In another, throwing trash into the trash bins is made fun by adding a sound effect to the bin triggered when trash is placed in it. These can be short-term or geographically-limited solutions—for example, behavior change is triggered only when the participant is next to the recycling bank or trash bin. Thus, this approach may not trigger either attitude or long-term behavior change.

Question 2
It has been several years since the BTS campaign was launched. It relied primarily on Facebook and YouTube to reach to its Gen Y target audience. Evaluate how effective these social media platforms would be in today's digital environment. Suggest other apps for today's Gen Y and Gen Z who are born between 1995-2012.

> Answer 2
> Since the implementation of BTS campaign, Facebook is no longer very popular amongst the younger segments of the age group (14-18) that the campaign targeted. That target market is now a bit older; and, the younger generation (Gen Z) is not using Facebook in the same ways or with the same frequency as Gen Y. Snapchat and Instagram are significantly more popular apps among these younger generations. However, the YouTube video contest and Instagram meme contest could still be relevant to, and effective with, Gen Z.

Question 3
One of the challenges social marketing campaigns face is sustainability of the campaigns in the long-run. Many campaigns are abandoned after a period of time or become ineffective. What can the BTS campaign do to keep the campaign fresh?

Mine Üçok Hughes, Marketing Department, California State University, Los Angeles, USA. Email: Mine.UcokHughes@calstatela.edu
Will McConell, Interdisciplinary Studies, Woodbury University, Burbank, USA. Email: Will.McConnell@woodbury.edu
Stephen Groner, Stephen Groner Associates, USA. Email: SGroner@sga-inc.net

Answer 3

One of the reasons people lose interest in any kind of campaign that requires participation and demonstration of behavior change is that the novelty and feeling of excitement produced generally provide rapidly diminishing returns for the target audience. In the case of BTS, the social media strategies worked for a short period, but in the age of fast-paced internet, where consumers are bombarded by messages and attention spans seem to be getting shorter; people move on to the next exciting or emerging phenomena. Given that the core premise of a CBSM approach relies on getting feedback from the community to create messages, a new BTS campaign should do the same and collect data to identify the barriers to anti-littering.

Question 4

How is an advertisement for anti-littering different from a community-based social marketing campaign like Be the Street? An example of an anti-littering ad campaign is by Johannesburg Zoo by Y&R from 2011 with the slogan “Animals Can't Be Recycled. Please Don't Litter.”

Answer 4

An advertisement campaign is a passive communication tool that can create an emotional reaction in an audience. It can affect behavior change, but it does not require immediate action or demonstration of behavior change—depending on the design of the advertisement. Often, ads have a *top down* approach and tell people what not to do rather than encouraging them what to do. Print advertisement campaigns are also not interactive.

Question 5

If you were given the task to design a similar anti-littering campaign to the BTS campaign in your region how would you go about creating and implementing the campaign? Who would be the target audience? What strategies would you use?

Answer 5

This is an implementation assignment that would depend on the student groups. Students can come up with many creative ideas. The idea here is to foster group participation by encouraging dialogue, peer-to-peer discussion, ownership of the final product, buy-in for the process, etc.

Question 6

What other social issues can be addressed by community-based social marketing strategies? Create a strategy outline. Who would be the target audience? What strategies would you choose?

Answer 6

Think of other social issues that can apply the social media campaigns (video and meme contest) used in the BTS program. Give suggestions for how they can be implemented. The answers to questions number 6 and 7 can be similar in terms of the social issues chosen, but a CBSM campaign does not have to use social media at all. In that regard, question 7 is looking specifically for a social media marketing strategy to implement a campaign. Recycling, encouraging the use of public transportation, creating urban communal gardens, and energy conservation are some of the many topics suitable for a CBSM campaign. Again, understanding how to identify the target audience and that specific audience’s perceived barriers to behavior change are key here.

Key Issues for Focus
Litter is a problem we all face in our everyday lives, especially in highly populated urban settings. For this reason, this case study touches upon a problem that is related to everyone and an issue almost everyone can see in their own communities. Prior to introducing the case study, the instructor can ask students what they know about littering in general and if they have seen, and can remember, any anti-littering campaigns. The students can be asked to make guesses about litter statistics. The instructor can share regional/national/global littering statistics and the damaging affects littering has on the environment (see below for additional reading suggestions). Other types of pollution (e.g., air, light) caused by humans can also be discussed. Another topic for discussion relevant to this campaign is slacktivism. Oxforddictionaries.com defines slacktivism as "The practice of supporting a political or social cause by means such as social media or online petitions, characterized as involving very little effort or commitment." Slacktivism is understood as superficial involvement through Facebook likes, using relevant hashtags or changing one's profile picture to reflect support for the cause. In any social media campaign, slacktivism would be a valid concern.

In-Class Activities
A documentary film can be shown in class, and students can be asked to discuss the film. Discussion questions 5, 6, and 7 can be turned into in-class activities.

Out of Class Activities
Students can be asked to organize a clean-up day on campus, at the local beach, parks, and streets. They can be given the task to organize and promote the event. They can be asked to document their experiences including who they targeted, how they reached their target audience, what message(s) they used, and how successful they saw the organization of the campaign.

Additional Resources
This web site has statistics about global littering: http://www.litteritcostsyou.org/9-interesting-facts-and-statistics-about-littering/
Various littering facts: https://www.conserve-energy-future.com/various-littering-facts.php
Keep America Beautiful web site (https://www.kab.org/home) has resources about recycling, reducing litter, and beautifying communities. Available for free download.
McKenzie-Mohr's book Community-Based Social Marketing is available to download for free at www.cbsm.com. The web site also contains many CBSM case studies and educational tools.
The Fun Theory web site www.thefuntheory.com includes short video examples of fun ways of changing consumer behavior for the better.
Documentary Films About Waste Pollution
A Plastic Ocean (2016): https://www.plasticoceans.org/about-film/ This documentary focuses on the North Atlantic gyre, trash mainly composed of plastics that have accumulated in the oceans; the film documents its impacts on people, animals, and the environment.
Trashed (2012): http://www.trashedfilm.com/ An award-winning documentary narrated by actor Jeremy Irons, the work explores the global scale and impacts of pollution created by consumerism.
Inside the Garbage of the World (2014): http://www.360exposurefilms.net/ A documentary about the plastic pollution problem.
The Majestic Plastic Bag - A Mockumentary: (Can be found on YouTube). This "mockumentary" video which presents the stark reality of California's plastic bag pollution situation is narrated by Academy Award-winner Jeremy Irons.

Recommendations for Future Outreach

This section provides additional information to the instructors about the BTS campaign. Several key findings from the program shaped recommendations for future outreach. The first set of findings discuss early program initiatives that were ultimately dropped or cancelled and speculate as to why those initiatives may not have succeeded. The second set of findings discuss successes of the program and explores what made these successful.

Unsuccessful Program Initiatives

Youth Resource Council: A key goal of the program was to promote peer-to-peer communication and ensure that Bay Area youth were well represented throughout the program. To that end, the program sought to develop a Youth Resource Council to assist in implementation of the program. The thought was that by giving Bay Area youth a larger and legitimate role in shaping Be the Street, the program would not only be improved but buy-in would increase. As an added benefit, it would free up program resources to be used elsewhere. The Youth Resource Council was ultimately disbanded because it proved too costly to support in terms of time commitment. Identifying the right champions, training them up to understand the issues and the program, and then collecting their feedback took considerable time. Unfortunately, by the time that cycle was completed, the students on the Youth Resource Council would depart due to other obligations, graduation, or the school year would end. Achieving a sustained payout after an initial training period was structurally impossible.

In addition, the geographic distance of a countywide program introduced challenges. The value of a Youth Resource Council was in its ability to meet, talk, and share ideas. Transportation needs made it difficult to achieve the goal of countywide representation.

ENewsletter: The program originally envisioned an eNewsletter. From the literature review, it was evident that email is a less popular channel for youth; thus, the eNewsletter was planned as a secondary mode of communication. It was quickly discovered that young people were unenthusiastic about signing up for emails that they would receive over the coming weeks or months, preferring more immediate feedback such as that provided by social media where clicking "Like" immediately tells their social network something about them.

Website Blog: The campaign's website was originally envisioned as the hub of the program. As traffic grew, the website was to develop a blog that would eventually host fan created content and more robust environmental messaging. Three structural changes to the program led to this being cancelled. First, Facebook emerged as the hub of the program and the original website received relatively low traffic. Second, as with the Youth Resource Council, the investment required to secure the content failed to justify the expense. Third, as with the eNewsletter, youth preferred a more immediate (and short) set of interactions and did not react favorably to a blog.

Successful Program Initiatives

Facebook emerged as the most powerful tool for youth oriented public education outreach. Facebook allowed the message to be delivered to the target audience at a time and in a way that was most convenient for them. It made messaging extremely social and helped rapidly promote the social norm. However, it was important to use the right tool for the job. Facebook was a powerful platform for sharing content (admittedly, that's what Facebook is intended to do), but a less powerful platform to get the target audience to take action (admittedly, Facebook is often used to "kill time," not to find an activity to undertake). For example, many of the memes were created at community events when staff directly engaged Bay Area youth and told them about the meme contest. Once created, though, the meme creators were eager to engage on Facebook, promote the campaign to their friends, and "like" or vote on their favorites. The two outreach modes supported each other. Localized community events generated deep engagement with the target audience which could then be translated into a willingness to *lightly* engage with the campaign via Facebook. Engaged fans were willing to view and share content on Facebook, but Facebook alone likely wasn't enough to get them to change behavior. Despite that, their light engagement on Facebook helped promote the campaign, support the social norm, and allowed the program to more readily reach and activate them for community events.

In addition to better understanding how to use the various tools of the program, a number of key insights emerged around what type of messaging best resonated with the target audience:

Short. Short, direct messages worked better than longer messages. For simple concepts, such as “don’t litter”, this was not an issue but could present a challenge for how to deliver more complex information.

Food. The target audience reacts strongly to food. Images of In-n-Out Burger had immediate and positive reactions.

Inspirational. Somewhat surprisingly, the target audience reacted very strongly (positively) to inspirational content. Optimistic messages about the future and a belief that anything is possible resonate with Bay Area youth.

Length of the relationship is important. The Facebook community grew at an exponential rate. It is easier to get fans once you already have fans, both because new visitors to the page are more likely to trust an established program and because of the underlying algorithms used by social media to determine what content to display. Be the Street is well positioned as a topic-neutral environmental brand and so could carry with it the community from one pollutant to another.

Chapter 24 **The Coulee Clean-up: A Social Marketing Program for Litter Pick-up in Lethbridge, Canada**

Katherine C. Lafreniere and Debra Z. Basil

Discussion Questions

Question 1
Do you think the Theory of Planned Behavior is an appropriate way to frame this case? What are the strengths and weaknesses of applying that particular theory to this case?

> Answer 1
> TPB is an effective frame for this case. Its inclusion of personal attitudes and social norms are very appropriate for a case focused on an environmental topic. In order to encourage participation, it is important that participants personally hold positive attitudes toward environmental efforts. In order to translate these personal attitudes into visible behavior, participants must perceive that their behavior will be accepted by others. Additionally, individuals will only be willing to engage in a laborious behavior if they believe they can make a difference, which is the control component of TPB. Litter collection offers a very visible reminder of one's accomplishment.
>
> While this theory is quite applicable to this case in general, it is framed from an individual perspective and thus is perhaps less applicable to the business audience. This group has the additional goal of image enhancement which is not well represented by this model.

Question 2
What is another theory that could effectively be applied to this case? Please thoroughly explain the theory you select, as well as its application to this case.

> Answer 2
> The Transtheoretical Model (Prochaska & DiClemente, 1982) offers an alternative way to conceptualize this case. This model proposes that behavior change occurs in stages: Precontemplation, contemplation, preparation, action, maintenance, termination, and relapse (see detail below). The different target audiences can each be viewed as residing in different stages of adoption. Businesses may be contemplating adoption of the program. They are open to the possibility and ready to receive additional information. Those new to the community know they wish to do something, but are not yet certain what it is. This group may be in the preparation stage, preparing to become involved in something. Families are often already active in other ways within the community. That action must simply be extended to the Coulee Clean-Up effort. Finally, middle school children may be classified as being in the relapse phase, as they had been active at a younger age, but since few programs are offered for their age group they were no longer actively involved in community programs.

Katherine C. Lafreniere, Alberta School of Business, University of Alberta, Edmonton, Canada. Email: klafreni@ualberta.ca
Debra Z. Basil, Dhillon School of Business, University of Lethbridge, Lethbridge, Canada. Email: debra.basil@uleth.ca

The Transtheoretical Model (i.e., Stages of Change; Prochaska and DiClemente, 1982) views behavior change as a progression through six stages (see also Prochaska and Velicer, 1997 for a review):

Precontemplation. Individuals do not yet acknowledge that there is a problem that needs to be changed.

Contemplation. Individuals acknowledge that there is a problem and are considering the possibility of change.

Preparation. Individuals are committed to make a change and are gathering information about what they will need to do.

Action. Individuals believe they can do the behavior and are actively involved in taking steps towards change.

Maintenance. Individuals are trying to maintain the change and avoid any temptations to return to a previous stage.

Termination. Individuals are not tempted to return to their old behaviors.

Relapse. This classification is not a stage but a form of regression. Individuals regressed from the action or maintenance stage back to a previous stage.

Question 3

"HSNC should have focused their attention on eliminating the behavior of littering before it occurs, rather than cleaning up after people litter." Elaborate on the pros and cons of this statement.

Answer 3

Eliminating litter before it occurs would seem to be a more efficient way to address this issue. The difficulty lies in determining how to do this. First, it would not be possible to completely eliminate litter by changing individual littering behavior, because quite a lot of litter is unintentional. Accidents will continue to happen no matter how committed people are to avoiding littering. Accidental litter will still need to be collected. Second, having people experience the hard work of collecting litter is a very good way to convince them that they should not litter. When we experience firsthand how difficult it is to correct a problem, we become much more cognizant of avoiding that problem. Actually performing the task of trash pickup most likely solidifies commitment to litter reduction in a lasting, concrete way.

Question 4

Identify and fully describe one way HSNC could increase company participation.

Answer 4

HSNC might try encouraging friendly competition among businesses, to increase employee turnout from each company. Companies could compete to have the highest percentage of employee turnout.

Question 5

Identify an additional target audience the Coulee Clean-Up could seek out. How would you suggest appealing to this audience?

Answer 5

One idea is that HSNC could target book clubs. Perhaps they could recommend a book situated in Southern Alberta to read, then encourage the group to participate in the Coulee Clean-Up before or after their book club meeting. They could promote to this group quite simply, through flyers at the local public libraries.

Another potential target group could be active seniors. This group could be reached through senior centers. The appeal might stress continuing to give back to the community which they love.

Out-of-Class Activity

Find another litter reduction program on the internet. Identify components that might be incorporated into the Coulee Clean-Up.

Several such programs exist, including:
America:
https://www.kab.org/sites/default/files/BeingaGoodNeighbor_AGuidetoReducingandManagingLitter.pdf

Australia: https://www.kabc.wa.gov.au/library/file/annual-reports/REDITED%20FINAL%20Litter%20Prevention%20Strategy%202015%20new%20edits%20WEB.pdf

Additional Resources

1. Transtheoretical Model:

http://sphweb.bumc.bu.edu/otlt/MPH-Modules/SB/BehavioralChangeTheories/BehavioralChangeTheories6.html

https://www.prochange.com/transtheoretical-model-of-behavior-change

2. Theory of Planned Behavior:

http://sphweb.bumc.bu.edu/otlt/MPH-Modules/SB/BehavioralChangeTheories/BehavioralChangeTheories3.html

https://www.utwente.nl/en/bms/communication-theories/sorted-by-cluster/Health%20Communication/theory_planned_behavior/

https://www.sciencedirect.com/topics/biochemistry-genetics-and-molecular-biology/theory-of-planned-behavior

3. Company support for employee volunteerism:

http://www.imaginecanada.ca/sites/default/files/www/en/library/kdc-cdc/uleth_companysupport_fs.pdf

4. Corporate social responsibility (CSR)

http://www.conecomm.com/research-blog/2017-csr-study

http://www.conecomm.com/research-blog/2015-cone-communications-ebiquity-global-csr-study

Teaching Guides for Education Related Cases

Chapter 25 Applying Social Marketing to Koala Conservation: The *"Leave It"* Pilot Program

Patricia David, Bo Pang and Sharyn Rundle-Thiele

Introduction
Discussion questions 1 and 2 provide direct questions and answers that can be used in class to extend understanding of key social marketing concepts, namely exchange and product delivering direct examples.

Discussion questions 3-5 challenge students to review case study material and come up with recommendations that could be implemented in future by program organizers. Answers provided here were tabled to the sponsoring local council by the project team and were being implemented in a city wide roll out at the time of writing this case study.

Question 6 asks students to identify a social marketing benchmark principle framework and then, using the information in the case study, they are challenged to find the principles embedded in the case study.

Discussion Questions

Question 1
What is the core product Leave It provides to the target audience?

Answer 1
The four-week training program is the core product Leave It provides.

Question 2
What "exchange" does Leave It offer to encourage dog owners to take their service? How could this be improved?

> Answer 2
> Redland residents paid a highly discounted rate ($150) in exchange for a 4-week training session to train their dogs to be more obedient and wildlife aversive. In addition, Leave It participants will also increase their confidence and gain more skills in how to train their dogs. Ultimately, dog owners will have better behaved dogs, that are less likely to interact with wildlife. In the future, Leave it will focus on increasing the value of the program including more diversified training contents, different forms of trainings (e.g., workshops, come-and-try sessions) without charging extra.

Question 3
Do you have suggestions for improving their promotional efforts?

Patricia David, Social Marketing @ Griffith, Griffith University, Nathan, Australia. E-mail: p.david@griffith.edu.au
Bo Pang, Social Marketing @ Griffith, Griffith University, Nathan, Australia. E-mail: b.pang@griffith.edu.au
Sharyn Rundle-Thiele,Social Marketing @ Griffith ,Griffith University, Nathan, Australia. E-mail: s.rundle-thiele@griffith.edu.au

Answer 3

It is recommended that promoting of the event should start three months ahead to ensure higher levels of community awareness are gained. Local veterinary businesses and pet businesses should also again be invited to attend DogFest and they will be encouraged to promote the event, through disseminating flyers, reminding customers to attend the event, and incorporating Leave It and DogFest news into their own newsletters to their customer base. To increase the uptake of Leave It from DogFest, all promotional materials such as flyers, posters, and online presence (e.g., logos and web links) will feature dog training businesses that partner with Leave It. During DogFest, a series of free dog training “taster” sessions delivered by Leave It program dog trainers will be offered.

Question 4

What can be offered to dog owners that do not feel confident to bring their dogs to training sessions due to dog behavioral issues?

Answer 4

Dog obedience and dog training seminars conducted by Leave It trainers for owners who are not confident to bring their dogs to training are recommended to extend the program reach. These seminars will be designed to assist dog owners to combat behavioral problems such as barking and chasing, and train desired behaviors such as staying, heeling, and coming back when called. Dog owners would not bring their dogs to the seminars, and they would have the opportunity to talk with dog behaviorists about any issues they have with their dogs, to understand what type of training would be most suited to their case as well as learn tips and tricks during the seminars. Seminars would provide information on local trainers who are available for one-to-one training and advanced koala/wildlife aversion training.

Question 5

How can Leave It improve the evaluation with a better response rate?

Answer 5

The effectiveness of Leave It in delivering wildlife aversion and crate training will be assessed using self-report questionnaires. Dog owners and trainers will be asked to respond to a provided paper survey on the first day of the training session and on the last training session day to assess change. The survey will contain questions to assess the level of basic obedience behaviors (e.g., sit, stay, stay quiet on command, come back when called, etc.) as well as the level of crate training and the level of wildlife aversion. Dog behavior will be measured by the question “Which of the following [behaviors] can your dog do?” For each one of the seven behaviors, respondents will rate their dogs’ behavior using a 5-point Likert-type scale where 1 is “Never” and 5 is “Always”. Moreover, Leave It trainers will be asked to provide detailed field notes and observations reporting on each dog in attendance at each of the four training sessions. Trainer reports provide additional rigor to the study by including trainer observation data that goes beyond dog owners self-report adding objectivity to the outcome evaluation.

In-Class Activity

The activity from discussion question 6 can be used to create a group activity. Teams can be formed, and groups can be challenged to find a benchmark guide, or you can supply benchmarks to teams (see Andresen, 2002 or the National Social Marketing Centres 8 social marketing benchmarks, available online at:

http://www.thensmc.com/sites/default/files/benchmark-criteria-090910.pdf). Teams then need to identify the presence (or not) of the benchmarks using the framework provided. An answer template using the National Social Marketing's 8 social marketing benchmarks is below.

Customer orientation	Extensive research undertaken including a systematic literature review, survey, expert interviews and co-design sessions with dog owners.
Insight	Dog owners sought dog focused, broader wildlife focus, fun- and training-oriented programs that showed them what they needed to do.
Competition	A range of previous campaigns aiming to reduce dog and koala interactions were identified in the research phase and dog owner reactions to campaigns were tested in co-design.
Exchange	A 4-week dog training program was offered at a cost of $150 for dog owners.
Marketing Mix	The full marketing mix was used: Product: A 4-week dog training program, Price: $150, Place: Three locations in the local city council area, Promotion: Dogfest, PR, and social media.
Theory	Theory of Planned Behaviour
Segmentation	Two segments were described in the Leave It case study as follows: The primary target audience of the program has a dog as a family pet. The audience believes that some dogs can pose a risk to koalas, but not small dogs. They also believe that dogs feel safe when they have their own space, such as a crate. The secondary target audience consists of people that have a dog for security reasons. They believe a dog should roam freely in their backyard at night because they have a fenced area, can go to the toilet, and they bark otherwise. Dogs of the target audience have received some type of training, such as puppy pre-school. However, despite having received training, dogs do not respond to basic obedience commands such as come back every time they are called, not chase things, and stay quiet.
Behaviour	Leave It aimed to improve koala aversion skills (ability to not chase a koala). Evaluations were undertaken by dog trainers who reported koala aversion behaviors increased for most of the dogs at the end of the Leave It program.

Chapter 26 Co-Creating a Sea Change Campaign for Ocean Literacy in Europe: A Digital Interactive Tool for Environmental Behavior Change

Christine Domegan, Patricia McHugh, Veronica McCauley and Kevin Davison

Discussion Questions

Question 1
What has co-creation theory to do with environmental behavioral change?

Answer 1
Co-creation theory is important for environmental behavior change because it emphasizes:

- "Creativity – co-creation is a form of collaborative creativity that enables groups to innovate with, rather than simply for their target groups.
- A rich mix – co-creation draws on a combination of approaches, interactions and processes related to co-design, co-discovery and co-delivery.
- A facilitated process – co-creation thrives on stories, fantasy, play and creativity.
- Relationships – it stresses the importance of focusing on the quality of the interactions between people rather than the technologies per se,
- A learning process – it needs to intertwine knowledge and processes in an overall co-creation framework, rather than just enabling co-creativity, if wider societal impact is to be achieved" (McHugh et al., 2015; Coates et al., 2009)

Question 2
What competitive analysis could be conducted to further inform the positioning decisions?

Answer 2
Students can be encouraged to identify further competition (Lee and Kotler, 2016; McHugh and Domegan, 2018). Students should be encouraged to remember that In Social Marketing, there are three competing factors that can interrupt or delay the behavior change you want to achieve: 'Choices people would prefer over the ones Sea Change are promoting' (e.g. digital games). 'Choices people have been doing "forever", such as a habit that they would have to give up' (e.g., using green, land-based examples as opposed to ocean examples).'Organizations and individuals who send messages that counter or oppose the change you wish to achieve (e.g., textbooks are easier to use, accessible to all and more economical than iBooks).

Christine Domegan, Marketing Discipline, NUI Galway, Ireland. E-mail: christine.domegan@nuigalway.ie
Patricia McHugh, Marketing Discipline, NUI Galway, Ireland. E-mail: patricia.mchugh@nuigalway.ie
Veronica McCauley, School of Education, NUI Galway, Ireland. E-mail: veronica.mccauley@nuigalway.ie
Kevin Davison, School of Education, NUI Galway, Ireland. E-mail: kevin.davison@nuigalway.ie

Also, students can be encouraged to identify the perceived benefits and barriers of the competition. It is useful for students to look at the perceived benefits and the perceived barriers or costs of engaging in the new behavior. They can then compare this to the perceived benefits and perceived barriers/costs of competing choices. Students can use the Table 5 from McHugh and Domegan (2018) to identify the perceived benefits and barriers of the competition.

How and Why: Use this activity to identify the perceived benefits and perceived barriers of your new behavior and that of the competing behaviors.

SEA CHANGE
OUR OCEAN | OUR HEALTH

Target Group Perceptions	New behavior	Competing behaviors
Perceived Benefits		
Perceived Barriers		

Table 5 Activity 1: Identify Perceived Barriers and Benefits of the Competition.

Question 3

What other social marketing theories could inform the co-creation participatory process?

Answer 3

Value-action gap from environmental behavior (Kollmuss & Agyeman, 2010)
Value theories in social marketing (Schwartz, 2012)
Exchange theory (Duane, Domegan, McHugh & Devaney, 2016)
Systems theory (Brychkov & Domegan, 2017)

Question 4

What engagement strategy would you recommend as part of the people strategy?

Answer 4

The engagement strategy for Sea Change moved significantly beyond passive information transmission to the facilitation and empowerment of interactive communication, debate, and dialogue with stakeholders. Encourage students to use the tool (Table 6) from McHugh, Domegan and Duane (2018) to assess the engagement strategy used in this case study.

How and Why: Use this Tool to gain a deeper insight into the engagement strategy that was pursued and activated.

Aim of intervention?	☐ Community information “Give back”	☐ Community involvement “Build bridges”	☐ Community integration “Change society”
Style of communication?	☐ One-way	☐ Two-way, more intervention team to community than community to intervention team	☐ Two-way, community to intervention team as much as intervention team to community
Number of community partners?	☐ Many	☐ Many	☐ Few
Frequency of interaction?	☐ Occasional	☐ Repeated	☐ Frequent
Nature of Trust?	☐ Limited	☐ Evolutionary	☐ Relational
Learning Process?	☐ Transferred from intervention team to community	☐ Transferred from intervention team to community and some from community to intervention team	☐ Jointly generated
Control over process	☐ Intervention team	☐ Intervention team	☐ Shared
Benefits and outcomes	☐ Distinct	☐ Distinct	☐ Joint

Table 6 Specify the Engagement Strategy for the Sea Change campaign

If you ticked more boxes in Column 2 than any other column, you intend to pursue a **‘Transactional engagement’** strategy

If you ticked more boxes in Column 3 than any other column, you intend to pursue a **‘Transitional engagement’** strategy

If you ticked more boxes in Column 4 than any other column, you intend to pursue a **‘Transformational engagement’** strategy

Q
W

Answer 5
Once you have identified the competition, the perceived barriers and benefits of the competition, you must decide on a strategy – to compete or to collaborate. When faced with a direct competitor, some form of collaborative response is a possibility.
For collaboration to work, two conditions have to be present:
1. There must be some capacity to find mutual benefit.
2. The partners must have roughly equal power (McHugh et al., 2015).

Students can use Activity 2 (Table 7) from McHugh and Domegan (2018) to help them decide whether to compete or collaborate.

How and Why: Use this activity to identify which strategies will be used—to compete or collaborate with each competitor.

Competitor	Compete or Collaborate	Reason for this Strategy

Table 7 Activity 2 Decide whether to Compete or Collaborate.

In this case: Co-operate chosen. Competition not recommended in this context.

Additional Resources

Bowen, F., Newenham-Kahinidi, A. & Herremans, I. (2010). When suits meet roots: the antecedents and consequences of community engagement strategy. *Journal of Business Ethics*, *95*, 297-318.

Brychkov, D. and Domegan, C. (2017). Social marketing and systems science: past, present and future, *Journal of Social Marketing*, *7*(1), pp. 74-93.

Coates, N., Roser, T., Samson, A., Humphreys, P., Cruz-Valdivieso, E. (2009). Co-creation: *New pathways* to value. An overview [white paper]. Available from http://learn.cspace.com/co-creation-new-pathways-to-value

Duane, S, Domegan, C., McHugh, P. and Devaney, M. (2016). Beyond restricted to complex exchanges: The social marketing change sgenda, *Journal of Marketing Management*, *32* (9-10), pp.856-876.

Kollmuss, A. and Agyeman, J. (2010). Mind the gap: why do people act environmentally and what are the barriers to pro-environmental behavior? *Environmental education research*, *8*(3), 239–260.

Lee, N.R. and Kotler, P. (2016). *Social marketing changing behaviors for good*, 5th Edition, Los Angeles; SAGE Publication.

McHugh, P., Domegan, C. and Duane, S. (2018). Protocols for stakeholder participation in social marketing systems. *Social Marketing Quarterly*. Available online at: https://doi.org/10.1177/1524500418761626

McHugh, P., Domegan, C., Devaney, M. and Hastings, G. (2015). D2.2 - A Set of *Sea Change Guiding Principles and Protocols*. EU Sea Change Project, Whitaker Institute, NUI Galway, Ireland Available online at: http://www.seachangeproject.eu/resources#type=report

McHugh, P. and Domegan, C. (2018). *D6.3 – Revised Ocean Literacy Co-Creation (Principles) Toolkit*. EU Sea Change Project, Whitaker Institute, NUI Galway, Ireland. Available online at: http://www.seachangeproject.eu/resources#type=report

Schwartz, S. H. (2012). An Overview of the Schwartz Theory of Basic Values. *Online Readings in Psychology and Culture*, *2*(1) Available at: http://dx.doi.org/10.9707/2307-0919.1116.

Chapter 27 **Social Marketing and Social Media Marketing for Enhancing Health by Means of MOOCs**

Gonzalo Diaz Meneses

Discussion Questions

Question 1
As you know, social marketing and social media marketing are not exactly the same. Please could you detail the similarities and differences between social marketing and social media marketing?

> Answer 1
> The main similarities stem from the common discipline of marketing. In fact, social marketing and social media marketing belong to the same scientific approach (they are both marketing and so consumer-base oriented), share equal philosophy (the core idea is exchange for the sake of market agents' satisfaction) and employ quite similar strategies and techniques (segmentation, positioning, competition, marketing mix, etc.).
> However, social marketing and social media marketing are fundamentally different fields of marketing. Following Philip Kotler et al. (2002), "Social Marketing is the use of marketing principles and techniques to influence a target audience to voluntarily accept, reject, modify, or abandon a behavior for the benefit of individuals, groups, or society as a whole." In contrast, social media marketing is the field of marketing designed to manage digital and electronic commerce and any sort of exchange that takes place over the Internet. On this basis, one might state that whereas social marketing gives more credit to social causes, social media marketing brings into focus the importance of the Internet and new technologies related to enhancing networks.

Question 2
What are the three key variables to explain the structure of the social marketing problem posed by the co-creation planning process related to E-health literacy?

> Answer 2
> These are digital literacy, health literacy, and digital health literacy. First, one can understand by digital literacy the degree of digital skills that individuals have and operate. For example, how well one can operate electronic devices, the Internet and social media. Second, health literacy refers to how well the individual handles information related to health, for example, how well health policies and practices are known and put into practice. Third, digital health literacy talks about the extent to which citizens already use the Internet and any type of online resource to help to manage their own health.

Question 3
After reading the case study, can you define the concept of co-creation?

Gonzalo Diaz Meneses, Faculty of Economy, Management, and Tourism, University of Las Palmas de Gran Canaria, The Canary Islands, Spain. E-mail: Gonzalo.diazmeneses@ulpgc.es

Answer 3
Co-creation is a form of collaborative behavior that the executive board of the project would like to bring about among people who potentially might help to build the MOOCS' contents by informing, advising, and taking part in set activities. It refers to any act of collective creativity consisting of contributing and sharing resources whose subject matter might be loosely based on participants' experience and expertise regarding health for the sake of the MOOCs and their users.
There are some other digital healthcare platforms such as, for example, *CarePages*, *PatientsLikeMe*, *Health unlocked*, *CureTogether*, *Smart patients*, *Treato*, *Patient opinion*, *The HealthTap*, and *The Ginger Iio Platform*, among many others, but they are not targeted as competitors. Why are they not considered competitors of the MOOCs from a social marketing perspective? Please, look up one of the above websites and explain why it was not listed as a competitor.
From a commercial marketing approach, these alternative digital health organizations might be considered direct competitors of the European Union MOOCs because they offer the same types of products, services, and experiences to their users. Nevertheless, from a social marketing point of view, competition relates to a conflicting behavior, belief, attitude, or idea that might be shown and performed by the target audience instead of adopting the desired response.

Question 4
This project will employ the block leader, commitment, prompt, and objectives techniques. Why does the downstream promotional approach of this project prefer antecedent techniques over consequent techniques such as rewards, feedbacks, and sanctions?

Answer 3
Social marketing provides a complete selection of techniques, so that targeted individuals might easily learn how to behave in a rewarding way (McKenzie-Mohr & Smith, 1999). Social marketing proposes antecedent and consequent techniques to be applied accordingly to the target audience profile in order to find a match between the motivational “hot buttons” and the persuasion technique. The antecedent techniques are suitable for people willing to adopt the advocated objective behavior (pregnant women and breastfeeding mothers, as well as patients with diabetes) and include *prompt*, *block leader*, *commitment*, *goal setting*, and *feedback* procedures; while consequent techniques are appropriate for audiences reluctant to embrace the desired conduct, and consist of organizing lotteries, raffles etc., and even implementing retirement mechanisms and sanctions, or *humorous* negative reinforcements, for example, by using “pop ups” to convey negative score information for performance progress.

Key Issues for Focus

One might suggest the instructor focuses on clearly delimiting the notions of social marketing and social media marketing. It is advisable to highlight that the terms are not interchangeable since they are fundamentally different. The instructor should be aware that there is a common misunderstanding, and, for example, it is very easy to come across this confusion on the Internet.

Also, this case study offers the opportunity to distinguish, theoretically, between targeting and segmenting. In this way, the instructor would be helping to correct another common mistake that exists not only among practitioners, but also in some manuals. In addition, there are three questions to be raised when one is at the point of targeting, and one might recommend that the instructor guides their students to formulate and respond to them with the aim of delimiting further the main co-creator's audience.

Furthermore, this case study gives credit to the existence of glaring differences between social marketing and commercial marketing mainly in regard to product (core benefits, actual responses, and augmented features) and price (effort, sacrifices, emotional costs, etc.).

Three approach levels have been put forward as follows: upstream, midstream, and downstream. Hence, the student should gain some understanding not only about this theory, but also about how to employ mega-marketing methods and how to find a potential ally. Similarly, the characteristics of the downstream promotional techniques should be fully described and understood so that operations that incorporate them can be performed with success. First, the instructor might emphasize the antecedent nature of the block leader, commitment, goal setting, and prompt. Second, the instructor should not only define every technique, but also explain how they work and how best to apply each of them to optimize their performance.

Competition is not the same in social marketing and in commercial marketing. In fact, a competitor is not defined as another organization in accordance with social marketing. For this reason, the instructor should underline the fact that despite the existence of other digital health platforms, the social marketing competition task brings into focus any other alternative behavior, belief, or idea that the target audience might prefer over becoming a co-creator for the MOOCs.

Applying commercial marketing doctrines to social marketing is very interesting. In this case study, it was possible to distinguish three levels of product: core benefits, actual response, and augmented features. One might suggest that the instructor leads their students to identify these levels in any other social marketing problem, for instance, paying taxes, safe driving, and gender harassment.

In-Class Activities

Google the terms "social marketing" and "social media marketing" to detect misuse of these terms on the Internet.

Recruit several block leaders in class and initiate their participation in this role-play by asking them to gather together individuals belonging to their social circles. Be aware that the block leaders should be the individuals with the greatest level of experience, involvement, and motivation for self-realization among their classmates. Obviously, the matter of expertise should refer to digital literacy, health literacy, and digital health literacy.

Put into motion the technique of goal setting. First, measure the level of digital literacy, health literacy, and digital health literacy in class by gathering information about these scales on the Internet, and once you have got these measuring instruments, try to set out the objectives.

Set as homework the writing up of a form that solicits commitment. Once the commitment form has been written, invite the students to sign it and find others to sign it. The content of this commitment should bring into focus the importance of taking part in the MOOCs' building process as contributor and co-creator for the sake of digital literacy, health literacy, and digital health literacy across Europe.

Invite each of your students to draw up their own prompt message. Later on, ask them to share their prompt messages and try to generate constructive criticism in the class group. Finally, encourage them to decide where and when the prompt messages should be lodged by considering who forms the target audience.

Browse the website of the project and gather more information about its members, mission and values, activities, and expected outcomes and impac[10]. (https://ichealth.eu/ic-health-survey-search-onlinE-health-information/ https://ichealth.eu/ic-health-survey-search-onlinE-health-information/).

Surface important webpage that are linked to the ec-Health project such as http://ehma.org/projects/ic-health-improving-digital-health-literacy-europe/ andhttps://ec.europa.eu/health/

Chapter 28 **Use of Social Marketing to Improve Science Teaching in Maharashtra, India**

Sameer Deshpande

Discussion Questions

Question 1
Referring to Andreasen (2002), which social marketing benchmarks seem to play a prominent role in the success of the initiative?

Answer 1
Andreasen (2002) recommends six benchmarks for a social marketing intervention to succeed. These include: behavioral changes, audience research, segmenting and targeting, exchanges, marketing mix, and competition. The current initiative reflects the presence of all key benchmarks of Andreasen as highlighted throughout the case study. While the presence of all benchmarks was important, it is likely that the presence of actual and augmented product (part of the marketing mix) played a critical role in the success of the intervention. Without making tangible the behavior (science kits), facilitating its creation, and promoting its use through the training program, the intervention would have likely failed to convince and equip teachers to adopt the constructivist approach.

Question 2
How did the marketing strategy overcome audience perceptions regarding barriers to the desired behavior?

Answer 2
Referring to the audience analysis section, we learn about several benefits to the current behavior and barriers to the desired behavior. Only when teachers perceived benefits from desired behavior to be superior to the current behavior and better than the barriers to the desired behavior, did they likely adopt the desired behavior and its tangible form. Several steps were taken to improve audience perceptions towards the desired behavior and reduce its barriers. These included:
presence of augmented product that allowed teachers to learn new skills, clarify doubts, and realize how to create and use kits and employ the ABSL approach,
attractive features of the training program that included no cost, delivery and attendance by peers, and organization at convenient locations,
support of senior colleagues in their classrooms that allowed teachers to understand the benefits of the new teaching approach firsthand, and,
contents of the kit that covered the entire syllabus and allowed teachers to deliver their syllabus within the set timetable.

Question 3
How did the organizers implement the stakeholder management approach?

Answer 3
Identifying key stakeholders, identifying their points of cooperation and opposition, and managing their influence were determined as important steps to influence the target audience. The organizers identified the school principal, senior colleagues of teachers, and the education ministry of the state government as important stakeholders. All were interested to partner in the initiative, but they had to be convinced about the efficacy of

Sameer Deshpande, Griffith University, Nathan, Australia. Email: s.deshpande@griffith.edu.au

the initiative and NYASS' and Mr. Hemant's ability to deliver on the project. The school principal and peers were convinced when the government got involved. The government was convinced to participate because of the previous connections with NYASS and Hemant and their reputation and experience to deliver on the training modules among science teachers.

Question 4
What underlying theory explains the success of the intervention?

Answer 4
Albert Bandura's social learning (1977) and self-efficacy (1997) are two relevant theories to this case. Social learning theory suggests that people learn from observing and modeling others, while the self-efficacy theory suggests that people are likely to carry out the desired behavior if they perceive that they can do it. The workshops that assembled the teachers and delivered instruction on the creation and usage of science kits through the hands-on approach in a group setting very likely helped teachers to observe and model instructors and peers. Additionally, the materials used to create kits were such that they were easily available, reasonably priced, and easy to integrate with the current curriculum. These attributes may have improved their self-efficacy to create and ultimately use the kits in the classrooms.

Question 5
Was social marketing appropriate to improving teaching standards in Maharashtra schools?

Answer 5
While there are several behavior-change approaches available to social change managers, social marketing tends to be relevant when the use of an actual and/or augmented product improves the likelihood of behavioral adoption. In the current case, the science kit *(actual product)* improved the ability of teachers to communicate science concepts and improve student learning more effectively than the traditional method of teaching. Additionally, the training of teachers to create and use the science kits was effectively delivered by the coordination of workshops *(augmented product)*. Due to these reasons, social marketing could be concluded as an appropriate way to improve teaching standards of science instructors.

Chapter 29 A Case of Co-Created Social Marketing Campaign: The Spanish Ana Belle Social School for Women's Empowerment

Yolanda Díaz Perdomo, Luis Ignacio Álvarez González, and María José Sanzo Pérez

Discussion Questions

Question 1

Explain the objectives that the Ana Bella Social School for Women´s Empowerment has and the benefits for surviving women that are part of the program.

Answer 1

The following objectives can be highlighted (Abenoza, Carreras and Sureda, 2015, pp. 102-103):

- *Empowerment of women at risk of social exclusion*. These women, especially those who have suffered gender violence, receive personal and professional training, accompanied by empowerment workshops and individual coaching.
- *Change of paradigm in labor insertion of surviving women*. The School offers women a job opportunity in visible jobs, instead of hidden jobs without social recognition. The fact of hiring them on the basis of their personal qualities, and not because of positive discrimination, means that the woman is not seen as a problem and is considered a part of the solution.
- *Creation of social and economic value, with a multiplier effect*. Women not only overcome the trauma of violence in their lives but are also encouraged to act as agents of social change, breaking the generational chain of violence against women, which serves as a true example to other women who suffer abuse.

Question 2

In your opinion, what are the main challenges and problems involved in partnerships between businesses and NPOs?

Answer 2

There are a number of challenges and problems that may arise when designing and developing alliances between companies and NPOs (Luis Vives Centro de Estudios Sociales, 2017; Iglesias y Carreras, 2013): (1) time and energy required, (2) short-term orientation, (3) the partners do not give priority to the alliance/restricted authority/lack of involvement of top managers, (3) difficulty in maintaining interest (after the initial stages), (4) too divergent objectives, (5) differences in organizational culture/expectations/structure, (6) power asymmetry, (7) rotation of key people/lack of institutionalization, (8) lack of skills necessary for cooperation, (9) lack of transparency/weak accountability, (10) skepticism about the alliance by the stakeholders, (11) prejudices about the different sectors and, (12) hostile environment.

Yolanda Díaz-Perdomo, Facultad de Economía y Empresa, University of Oviedo, Oviedo, Spain. Email: yolandadiazperdomo@gmail.com
Luis Ignacio Álvarez-González, Facultad de Economía y Empresa, University of Oviedo, Oviedo, Spain. Email: alvarezg@uniovi.es
María José Sanzo-Perez, Facultad de Economía y Empresa, University of Oviedo, Oviedo, Spain. E-mail: mjsanzo@uniovi.es

Question 3
Based on the four critical dimensions of co-creation, please provide recommendations to make this collaboration as effective as possible.

Answer 3
Regarding the *participation* dimension, the partners should share information, provide suggestions and participate in decision making. In relation to the *involvement* dimension the partners should make contributions for the realization of the joint project. These contributions may have a diverse nature (cash, in kind, equipment and/or infrastructure, corporate volunteering), but all of them should be valued. Regarding *collaboration and commitment*, they should encourage trust and loyalty, investing in long-term relationships. Finally, *mutuality* can be reinforced if the partners help each other, if the costs and benefits are balanced over time, and if each partner benefits according to the efforts made.

Question 4
What type of resources can be provided by firms and nonprofits to the alliance?

Answer 4
Firms: cash, in kind products, equipment and/or infrastructure, corporate volunteering, greater visibility, opportunities for learning and for capability development, access to networks, improving relationships with other companies, etc.
Nonprofits: access to beneficiaries, image and reputation, knowledge about the social problem, other services provided to women (refuge, legal advisory services, etc.).

Question 5
Do you think this is truly a social marketing campaign, or is it merely a non-profit effort? Support your position.

Answer 5
Social marketing, such as the use of marketing practices (product, price, place and promotion) to promote social change, has resulted in social marketers and their customers being able to actively interact to create activities that improve the quality of life of sectors of society with certain needs. The Ana Bella Social School for Women´s Empowerment, beyond the effort made by a single entity (company or NPO) is a social marketing campaign that promotes the change of behavior of its customers (female survivors of gender violence), through the combined efforts of the participants (Danone, The Ana Bella Foundation, Momentum Task Force, and the beneficiaries of the program).

Key Issues for Focus:
Present the case and its structure.
Define the prerequisites in order to analyze the case.
Establish the competences (general and specific), as well as the expected result of the learning process.
Establish the learning objectives.
Establish the methodology.
Define the criteria and evaluation requirements.
Establish the main didactic resources, bibliography, and complementary documentation.

In-Class Activities
1st SESSION:
PRESENTATION, DESCRIPTION AND RESOLUTION OF THE CASE, AND ESTABLISHMENT OF TASKS FOR OUT OF CLASS.

The teacher (1) presents the case, (2) leaves some time for the students to read it, (3) solves, with the students, the discussion questions, (4) promotes the debate, and (5) establishes the work that the student must do outside of class.
The individual (or team) work to be done by students is established: develop a socially innovative project co-created by a business and an NPO, specifying:
Partners involved (identification, vision, mission and objectives of the entities).
Co-creation project (indicating the social, economic or environmental problem that it is intended to solve, and the target audience).
Resources provided by each organization.
Marketing strategy.
Benefits achieved. At the micro, meso, and macro level.
2nd SESSION:
PRESENTATION OF THE INDIVIDUAL WORK OF THE STUDENT.
Each student presents their work, with power point support or similar.
Subsequently debate is promoted about the case.

Out-of-Class Activities
Development by the student of the individual or team work specified.

Additional Resources
French, J., & Russell-Bennett, R. (2015). A hierarchical model of social marketing. *Journal of Social Marketing*, *5*(2), 139-159.
Luecking, R., Deschamps, A., Allison, R., Hyatt, J., & Stuart, C. (2015). A Guide to Developing Collaborative School-Community-Business Partnerships. *National Technical Assistance Center in Transition*.
Parker, L. B. A. L. (2014). Beyond behaviour change: Social marketing and social change. *Journal of Social Marketing*, *4*(3).

References
Abenoza, S., Carreras, I. & Sureda, M. (2015): *Colaboraciones ONG y empresa que transforman la sociedad*. Programa ESADE-PwC de Liderazgo Social 2014-2015
Iglesias, M. & Carreras, I. (2013): *La colaboración efectiva en las ONG. Alianzas estratégicas y redes*. Programa ESADE-PwC de Liderazgo Social 2012-13
LuisVivesCES (2017). Luis Vives Centro de Estudios Sociales [online] Available at: http://www.luisvivesces.org/actualidad/noticias/_hacia_donde_va_la_colaboracion_entre_empresas_y_ong_.html [Accessed March 14th, 2018]