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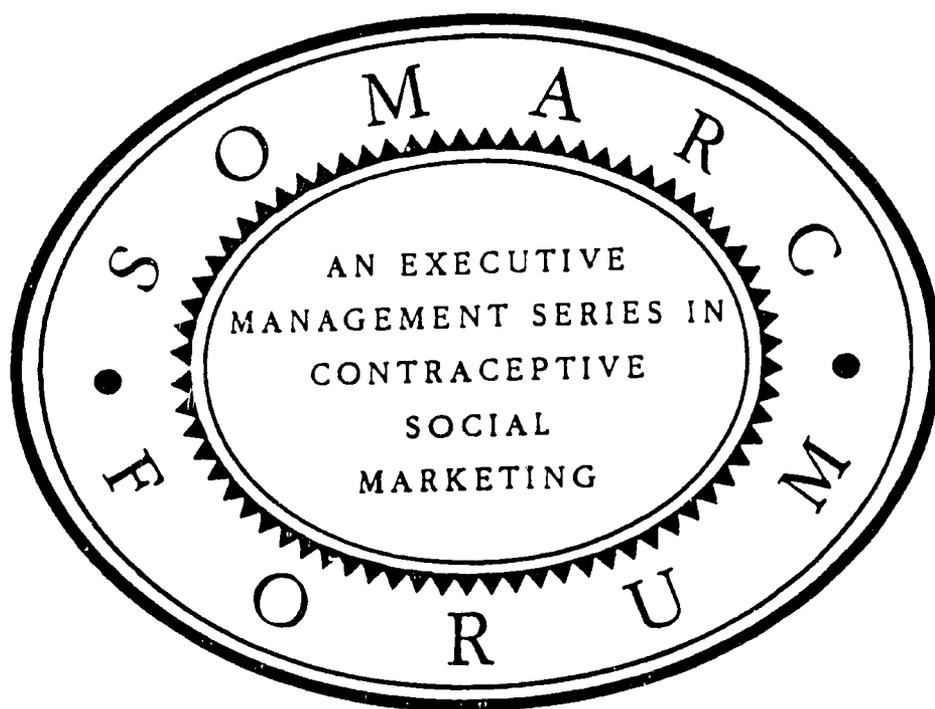
SOMARC *III*

SOCIAL MARKETING FOR CHANGE

THE
FUTURES
GROUP

SOMARC FORUM

Integrated Marketing Communications
Participant Manual



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Washington, DC

Prepared for: The Futures Group
Washington, DC

Govt # AID/DPE-3051-Z-00-8043-00

Five Day Agenda

First Day

- | | |
|-------------------|--|
| | 1. The Planning Foundation |
| 8:30 a.m. | Orientation
IMC Concept
Pre-Planning Considerations |
| 10:45 a.m. | Break |
| 11:00 a.m. | Communications Planning
Summary |
| 1:00 p.m. | Lunch |
| | 2. Advertising |
| 2:30 p.m. | Overview - Positioning |
| 4:00 p.m. | Break |
| 4:15 p.m. | Concept Groundwork |

Second Day

- | | |
|-------------------|---|
| 8:30 a.m. | Concept Groundwork Exercise |
| 10:00 a.m. | Concept Development |
| 11:00 a.m. | Break |
| 11:15 a.m. | Concept Development Exercise |
| 12:00 p.m. | Strategy Development |
| 1:00 p.m. | Lunch |
| 2:30 p.m. | Strategy Development Exercise |
| 3:30 p.m. | Break |
| 3:45 p.m. | Creative Development
(Techniques & Structures) |

Third Day

8:30 a.m.	Creative Evaluation
10:30 a.m.	Break
10:45 a.m.	Creative Evaluation Exercise
12:00 p.m.	Media Objectives
1:00 p.m.	Lunch
2:30 p.m.	Media Evaluation
3:45 p.m.	Break
4:00 p.m.	Media Evaluation - Cont'd

Fourth Day

8:30 a.m.	3. Entertainment
10:30 a.m.	Break
10:45 a.m.	Entertainment Exercise
	4. Public Relations
12:00 p.m.	Overview
1:00 p.m.	Lunch
2:30 p.m.	Process
3:30 p.m.	Break
3:45 p.m.	Process - Cont'd

Fifth Day

8:30 a.m.

Crisis Management

10:45 a.m.

Break

5. Sales Promotion

11:00 a.m.

Overview

12:00 p.m.

Process

1:00 p.m.

Lunch

2:30 p.m.

Process - Cont'd

3:30 p.m.

Break

4:00 p.m.

Graduation

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INTRODUCTION

Contraceptive social marketing, which we will refer to throughout this manual as CSM, is a complex and sensitive subject. Encouraging contraceptive trial involves:

- Conveying "benefits," that is, making sure we find meaningful ways to tell the target audience what value the product can have for his or her life.
- Overcoming "barriers," that is, addressing the target audience's fears and resistance to contraception. These barriers can be related to the product itself (e.g., rumors, side effects) or to fears of social and cultural reprisals.
- Reducing perceived "risks," that is, ensuring that the target audience is knowledgeable and informed about contraception and CSM products so that they are not afraid to become users.
- Providing peer and authority group "support," that is, reinforcing the target audience's desire to contracept by using communications to gain the support of important influence groups (e.g., medical professionals, co-workers).

Producing continued usage among contraceptive triers requires different incentives. These might include implementing marketing communications efforts to build brand loyalty, reconvert lapsed users and/or promote more consistent usage. In short, to achieve long-term increases in contraceptive prevalence the CSM manager must create an environment in which family planning is socially, economically and personally acceptable.

No single communications tool is sufficient to accomplish all tasks necessary to consistently increase contraceptive prevalence. While the end-consumer must be reached, there are also other audiences whose support is needed. Some of these include the "trade" or "middlemen." These are people such as physicians, pharmacists, chemical sellers and mid-wives, who directly sell or promote our products to the end-consumer. We also need to reach "gatekeepers" like the Boards of Directors of television stations who can block our access to communications if they so desire. And, of course, we must reach "influentials" like the press, or civic associations whose support can be a key component to facilitating a CSM program's acceptance.

In light of this, Integrated Marketing Communications (IMC) is vital to optimizing the effectiveness of our CSM programs. It is a strategically based, total communications planning process grounded in marketing objectives and strategies. It asks that the CSM Manager first lay a foundation for planning by thinking through the communications implications associated with:

- **"Spheres of influence"** in the consumer's life. What people, activities, organizations and media can have the most effect on determining the target audience's receptivity to CSM products?
- The **"nature of the product or service."** What are the communications implications if we sell an ethical product (prescription required) versus an O-T-C (over the counter product where no prescription is required)? How important is the decision to contracept in the consumer's mind?
- The product and consumer **"lifecycle"** stages. Is the brand being introduced or is it established? How ready is the consumer to accept our products?
- The **"selling chain."** What is the nature of our middlemen or the trade? What are their communications needs?
- The **"selling environment."** What communications laws and policies will we face? What distribution system is in effect? Who are our competitors?

The CSM Manager then approaches communications planning from a total standpoint. He begins with further defining marketing objectives and strategies in the context of communications, and later identifies which specific communications components are needed to achieve these goals. These components include advertising, special entertainment or educational events, public relations, and sales promotion. Such decisions cannot be made lightly -- there is only one source of funds from which you can finance IMC efforts so you must choose the most appropriate tools and use them wisely. As components are identified and executional approaches are considered, the CSM Manager should seek every opportunity to integrate his communications (e.g., through graphics and slogans), thereby extending and reinforcing his message throughout all channels.

Training of middlemen and the trade is also a key component of effective CSM programs. The communications materials for this purpose (e.g., sales aids) should be integrated with the rest of the IMC efforts. But training is distinct from the IMC tools we will discuss in this module, because it is closely linked with personal selling and involves one-to-one communication. A separate module entitled "Contraceptive Technology" has been developed to assist us in training key middlemen in the field. Effective sales and training programs will also be discussed in the Strategic Marketing module.

In sum, the IMC approach simply asks four things of the CSM Manager:

- That he be knowledgeable about his audiences and marketing environment,
- That he be able to think strategically,
- That he have a solid familiarity with the various communications components (advertising, special events, public relations, and sales promotion), and
- That he be imaginative in using and integrating these components in accomplishing his marketing communications goals.

The purpose of this manual is to stimulate your thinking in these areas to increase the overall effectiveness of CSM programs everywhere.

Section #1
"THE PLANNING FOUNDATION"

THE PLANNING FOUNDATION

A. THE IMC CONCEPT

Theoretical Roots

What do we mean by Integrated Marketing Communications (IMC)? It is the coordinated use of a variety of tools, all working together, to communicate your major idea. The tools can include public relations, advertising, entertainment, and sales promotion. Depending on the tool, your message may be expressed differently, but all tools work in an integrated fashion to convey the big idea. To provide a frame of reference, let's think about how communications fits into the total marketing mix and why integration is important.

Classical marketing theory defines the marketing mix by "4 P's" -- "promotion," "product," "place" and "price." These are the variables the CSM manager can use to define his product or service for the consumer.

With IMC our main area of interest will be "promotion" in its broadest context (see below). However, each "P" provides an opportunity to communicate with the consumer. For example:

- **Price** -- The price can enhance or detract from consumer impressions of product quality.
- **Product** -- Names can evoke imagery about a product or user (e.g., Panther condoms).
- **Place** -- The type of place in which your product is sold can affect its image.
- **Promotion** -- The mix and way you use promotion components (advertising, special events, public relations, and/or sales promotion) can create different perceptions.

Synergy

To maximize the impact of our marketing plan and provide a cohesive face to the consumer, we need integration among the 4 P's. A competitively superior, ultrathin condom merits premium pricing, upscale packaging and display, and a first rate advertising campaign. Not the reverse or marketing variables which are at cross-purposes.

When we have consistency among the marketing variables we call it **SYNERGY**: "the interaction of two or more variables that together achieve an effect which is greater than any single effect." The best marketing plans strive for synergism, because marketing plans become more efficient and effective when all variables reinforce one another.

Synergy begins with strategy development. As marketers you will have different strategies for each marketing variable, but conceptually they should all be compatible because they are based on the same goal. If creating awareness for a new CSM product is the key marketing objective, your advertising strategy will be designed to provide an introductory message at high weight levels, your public relations plan will be designed to engage key publics through education and persuasion about the merits of your product, a consumer sales promotion strategy will probably focus on trial, etc.

Objectives and Strategies

At this point, let's distinguish what we mean by "objectives" and "strategies" as key elements to the IMC planning process that help us achieve synergy. Simply stated:

- **Objective**: What you want to achieve: the "WHAT".
- **Strategy**: How you are going to achieve it: the "HOW". The "HOW" represents an overall action plan and incorporates all the executional devices you will use to accomplish your objective.

As you know, we have an overall marketing objective and marketing strategy for each of our CSM programs, as well as various sub-objectives and sub-strategies for each marketing variable like pricing, training, distribution, advertising, public relations, etc. All elements work "synergistically" to help achieve the overall marketing objective and strategy.

For perspective, let's look at a hypothetical example for marketing Panther condoms in a CSM country:

- | | |
|-------------------------------------|---|
| <u>Marketing objective</u> : | To increase contraceptive prevalence among young males. |
| <u>Marketing strategy</u> : | To increase the base of first-time users among sexually active young males from 10% to 15%. |

It will be critical that all other plans, your promotion objectives, your advertising, your public relations, and your entertainment all feed back into and help achieve your marketing objective. Importantly, the advertising works synergistically with the promotion and both feed back to the marketing strategy of "increasing the base of first-time male users." Additionally, we have clearly differentiated "WHAT" we are trying to achieve (the objective) from "HOW" we are going to achieve it (the strategy), in both the broadest marketing sense as well as for the specific communications components. This clarity of thinking and planning is essential for developing impactful IMC plans.

Promotion/Marketing Communications Decisions

Now that we've discussed important aspects of integration/synergy ("I") and the marketing framework in which we operate ("M"), it's time to delve into communications planning and its components ("C"), because that is the heart of IMC. The communications components we are interested in are classically categorized among the 4 P's under "Promotion." ~~These components include advertising, special entertainment or educational events, public relations, and sales promotion.~~ For clarity, let's rename "Promotion" -- "Marketing Communications."

Often in CSM programs we rely too heavily on only one of these communications components -- advertising, to accomplish our objectives. If you look at the variety and complexity of potential CSM marketing objectives you can see why advertising alone is insufficient. For instance:

- Generate awareness. This might be for a new product or one that's never fully been established in the marketplace. Diverse groups may need to become aware of our products and/or the importance of contraception in general. These groups may have different communications needs -- the end-consumer may need one type of awareness (e.g., the existence of a low dose pill) and the physician another (e.g., why our low dose pills are preferable).
- Enhance brand image. Perhaps we have a poor quality image that needs to be addressed, or maybe we need to overcome specific negatives.

For example, we might have a situation where rumors or misinformation about our products exist. Alternatively, we might discover that specific product-related problems (e.g., shelf stabilization) have created negative perceptions. Or perhaps negative public outcry has been directed against our products. There are other tools we can use to rectify these issues in addition to mass media (e.g., public relations).

- **Educate.** When we introduce a CSM program or launch a new CSM product, we often find we must educate many groups of people. We may need to educate consumers on the benefits of family planning. We may need to educate influentials on the need for contraceptive advertising. We may need to educate physicians on how to counsel their patients on injectibles. In sustaining CSM environments, we may need to educate consumers on the correct use of non-prescription products.
- **Motivate.** In introductory environments we need to motivate consumer trial, and encourage the trade to carry and promote CSM products. For example, if we are introducing a new oral contraceptive, the goal may be to direct consumers to see their physicians. If that's the goal, we need to be sure physicians are motivated to promote CSM products.

In sustaining environments, building repeat purchase or encouraging brand loyalty among consumers and the trade can be important. For example, consumers may be aware and knowledgeable, but contraception may not be a regular practice. We need to motivate more consistent behavior.

The multiple marketing communications issues connected with any one of these objectives suggests that we must draw on the spectrum of communications components to realize our goals. That does not mean, however, that we must always use all four tools (advertising, special events, sales promotion and public relations), or that we must give equal weight to every tool we've opted to use. The funding for IMC comes from one budget. The issue is how to divide this budget. We need to understand which communications tools are most important to achieve marketing goals, set our priorities, and allocate funds and resources accordingly.

Regardless of the tools you select, it is critically important to seek opportunities to integrate your message. A consistent message in all IMC tools allows you to stretch your dollars. Additionally, if you know your environment well enough, it is sometimes possible to use it to your advantage in an integrated communications plan.

In 1986, the Mexico CSM group had the objective of launching "Protector" condoms using distribution in government-owned grocery stores. Because of the widespread and unusual distribution network, it was imperative that the CSM group generate awareness for Protector as quickly as possible. Coincidentally, during the time that the planning for the launch was underway, arrangements were being made for the World Cup Soccer Championship to take place in Mexico City. The CSM group knew that if they could tie the condom launch into the soccer championship, they could build awareness more rapidly. The CSM group also knew that the way to take advantage of the tournament was to tie Protector to it at every communications point.

Thus, the CSM group developed an integrated marketing effort for Protector by using radio advertising, sampling, promotional t-shirts, pamphlets at point-of-purchase displays, as well as sales aids to the trade. All these materials took advantage of a common graphic symbol, a cartoon-like "condom" soccer player, and worked synergistically. Because the CSM group took advantage of this opportunity, they were able to build share rapidly. If only one of the communications tools had been used, the launch would likely have had less impact.

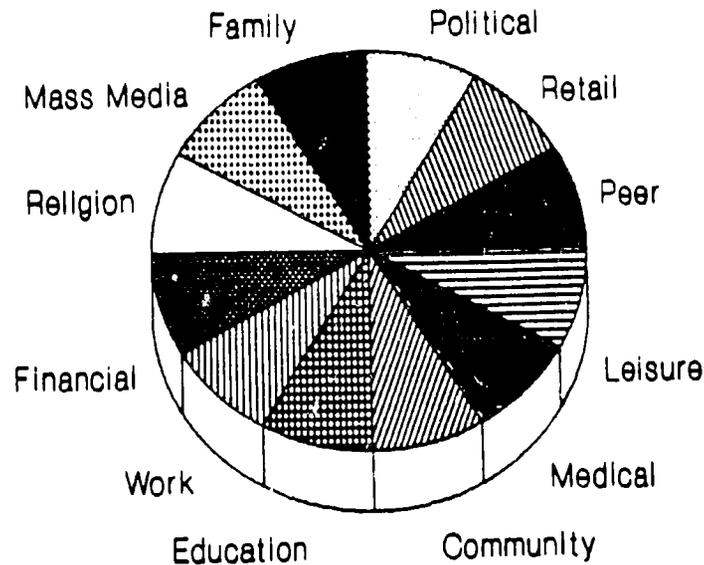
B. IMC PLANNING CONSIDERATIONS

How do we begin to approach our marketing opportunities from an integrated marketing communications standpoint? The first step in developing an IMC program is to think through and record considerations connected with five basic issues regarding the marketplace and consumer: 1) the consumer influence profile; 2) the nature of the product or service; 3) the product and consumer "lifecycles;" 4) the selling chain; and 5) the selling environment. You will have evaluated issues connected with many of these when developing marketing plans. However, rethinking them in the context of communications and then writing them down can organize your thinking and help generate new ideas. Once you understand the communications implications in these five areas you will have a framework to begin planning. Let's take them one at a time.

1. Consumer Influence Profile

With IMC we need to get beyond a basic target audience definition (age, socioeconomic status, urban vs. rural), and look more closely at influences in the target audience's life that can affect his/her behavior. In some cases, these influences can provide communications opportunities; in others they represent communications obstacles. The key is for the CSM manager to identify and understand these influences in advance, so they can be used to best advantage. We call this process developing a "consumer influence profile." The graphic design on the next page suggests the broad categories that make up a typical consumer influence profile.

Consumer Influence Profile



The CSM manager should identify specific components within each area of influence and assess how they may impact the target audience. You must decide which influences are opportunities and which are obstacles. While you are probably doing this to some extent now, a systematic approach can provide the basis for identifying new strategies and the appropriate communications components to deal with key groups. Let's look at some examples.

In some cases, a leisure area of influence may provide a novel place to promote your product, thereby representing an opportunity. For example, the CSM group in Barbados identified Rally Car Racing as one of the most influential past times. They involved Panther condoms in sponsoring the champion J. Rally car driver throughout a series of races. The driver's success provided plenty of on-going publicity for the "Panther Toyota Starlet" as well as sampling opportunities and a de facto endorsement by a "celebrity" sportsman. As another example, in Jamaica where soccer is the most popular sport, soccer games provided a vehicle for reaching condom users with banners on grandstands. Product samples, a Condom Cap day and/or use of a celebrity athlete could also be associated with this forum. In rural Ghana, where community storytelling is part of the culture, community theater is being explored as a way to introduce family planning concepts to more rural areas.

In other cases, you might decide that vocal community groups, the political system and/or the religious system represent potential communications obstacles to a CSM program. Some of these groups may be easier and more valuable to address than others. In either instance, organizing your thoughts and increasing your sensitivity early, may encourage you to think through how to diffuse negative reactions before they occur.

For example, the Brazilian CSM team recently began a new advertising campaign promoting contraception. Prior to airing the campaign, it was discovered that several influence groups would be unhappy to see advertising for contraception on the air and they might respond negatively. Because of this, the CSM group took precautions. Publicity materials were formulated in advance of the advertising launch, and sent to key members of the press, to educate them about the campaign and prevent it from being sensationalized. These materials included results from surveys among opinion leaders and consumers on contraceptive advertising, a review of CSM educational efforts underway on contraception, and the results of pre-testing the advertising. This created such a positive environment that negative response was forestalled. As a positive by-product, the press became so favorably predisposed toward the CSM project that a leading local newspaper actually picked up a copy of one of the campaign's educational pamphlets and published it.

2. Product or Service

Its Nature

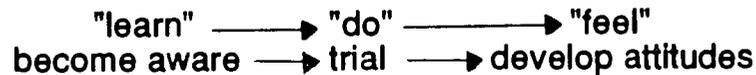
Another consideration in developing an IMC program is the nature of your product or service. Is it over-the-counter (condoms) or ethical (oral contraceptives/OC's)? Does the complexity of the product require special instructions for correct use? Does it require medical reinforcement to dispel rumors or provide reassurance? What kind of behavior change will be required? The answers here have implications for the focus and levels of effort behind elements in your marketing communications mix.

Consumer Behavior

Further, we need to understand where CSM products and services fit in terms of consumer behavior. There are "low-involvement" and "high-involvement" categories and products, which generate very different marketing requirements.

"Low-involvement" products are ones that consumers don't think much about prior to purchasing them. The reason these purchases don't require much thought is because they do not involve moral dilemmas, high expenditures or major compromises. Such items would include personal care products like razor blades, shampoo and soap.

One easy way to understand this behavior pattern is as follows:



The consumer first learns or becomes aware of the product. He then acts or buys it, often on impulse but certainly without much forethought. After buying and using the product he may develop some feelings or attitudes toward it that might affect subsequent purchase decisions. But since these decisions were not very important to him to begin with, low involvement categories typically don't have much inherent consumer loyalty.

In contrast, CSM products are considered "high-involvement." High-involvement decisions are important ones, and often require a long thought process before purchase or behavior decisions are made. Expensive items like cars and washing machines are high involvement because of their cost and their longevity.

The high involvement behavior pattern is as follows:



The consumer first learns or becomes aware of the product or service and goes through a lengthy education process to find out all about it. He then develops attitudes towards the product based on this information and forms an opinion. This opinion governs whether or not he tries the product.

It is because of this thought process that appropriate communication is so important in CSM programs. We need to create awareness of our products among many groups and provide accurate information to all parties. We need to guide the opinions that consumers form by creating motivating advertising and explaining product complexities through credible spokespeople. It is only with careful attention to these elements that trial will occur.

While all CSM products are high involvement, certain CSM products may be more "high involvement" than others. For example, condoms may be on the lower end of the scale because they are used externally and have no lasting effects. In contrast, implants like Noroplant or IUD's are probably on the higher end because they are located inside the body and might have side effects.

3. LIFECYCLES

Product Lifecycle

CSM products are generally considered to progress through three stages -- introduction, growth, and maturity. The effectiveness of communications tools and expenditures will vary by lifecycle stage.

In the early stages, high communications expenditures are often required to generate awareness, encourage brand loyalty, etc. Most CSM products are at this point. At maturity, while we will still need communications expenditures in virtually all areas, they will be more moderate.

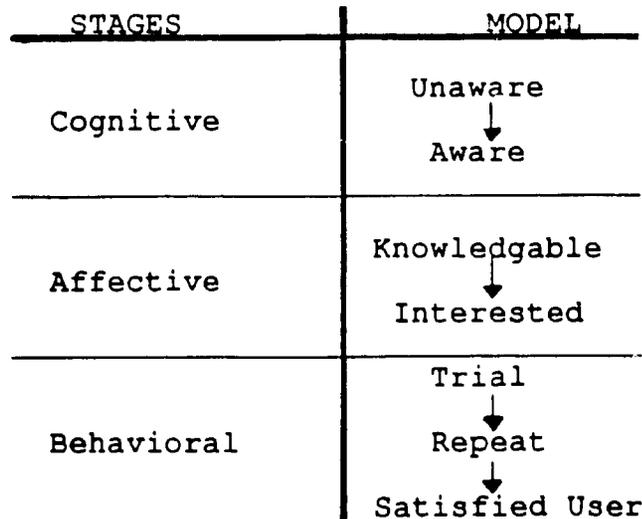
Consumer Lifecycle

The consumer may also be at different stages of awareness and readiness to accept contraception and specific methods and brands. This also has communications implications. The CSM manager will be seeking different responses from the consumer, depending on the consumer's receptivity and knowledge of contraception.

According to one Consumer Lifecycle model, the consumer moves through a logical series of response stages when it comes to adopting a new product or idea. The process begins with a cognitive or mental stage as the consumer learns about the new product or idea. This is followed by an affective or emotional stage where feelings become attached to attitudes toward the product or brand. And, finally, the model concludes with the behavioral stage that is marked by some overt action. The Consumer Lifecycle can be applied to CSM products. At the cognitive stage, the CSM manager may need to put something into the consumer's mind. At the affective stage, he may need to change the consumer's attitude. At the behavioral stage, getting the consumer to undertake a specific action is what will be required.

Graphically this can be expressed:

RESPONSE HIERARCHY MODEL



It is the CSM manager's responsibility to move consumers through these stages; otherwise they will not become regular users of CSM products.

Generating awareness alone, is only sufficient if the consumer already knows he wants our products above all others. That is an unlikely scenario. In most cases, at the cognitive stage we will need to generate awareness among many groups using advertising and public relations and personal selling. These tools will continue to be important at the affective stage, where we must tell consumers an accurate and compelling message to stimulate their desire for our products. We may also find that the need for personal selling (e.g., in stores, among the medical community) becomes particularly important at this stage to move consumers toward trial. Finally, the behavioral stage may require strong use of sales promotion to generate trial and ensure continued usage of CSM brands and the practice of contraception.

Of note, this response model can also be applied to gatekeepers and influentials who affect CSM programs. We can court this group throughout the cognitive and affective stages through symposia, press briefings, and other types of solicitations. The behavior we are seeking is their support and endorsement of our programs.

4. Selling Chain

The selling chain is another important consideration in establishing the framework for IMC planning. Appropriate communications at key points in the selling chain help ensure the product moves smoothly into the marketplace without important "middlemen/the trade" being overlooked. Middlemen/the trade are the terms we will use to refer to all the people who directly sell the products to the consumer. In other words, those are the people in between the manufacturer/distributor and the end-consumer.

Typical middlemen between the manufacturer/distributor and the consumer might include physicians, mid-wives, pharmacists, shop keepers, clinic personnel, hospital personnel, community based distribution systems, outreach programs and so on. These people fall into two groups: medical and non-medical personnel. The nature of the communications and the tools we need to use will vary depending upon which group the middlemen fall into.

Medical personnel include physicians, some clinic personnel and mid-wives. All other middlemen fall into a non-medical category, and traditional trade promotion techniques are effective here.

Our focus in this module will be on promotion to non-medical personnel since the specialized needs of detailing are often handled by experienced pharmaceutical companies. However, it is important to remember in all cases that the CSM manager's ability to address the needs of key middlemen can make the difference between success and failure.

Training is always a major tool to use with members of the selling chain. While training is a subject for other SOMARC Forum modules, you should note here that training can be handled in various ways. In Latin America, for example, a significant effort is put into seminars and development programs for pharmacists. Educating and providing incentives to pharmacists to promote CSM products has proven to be a major influence on sales growth. In Ghana, we have implemented a major training program for chemical sellers. The government permitted us to use chemical sellers as a major distribution source for oral contraceptives, providing they were trained.

In sum, the selling chain is a critical area for communications that cannot be overlooked. You must make sure that key groups in this chain receive attention, whether that attention is in the form of trade promotions, special detailing efforts, and/or training seminars. It is not enough to direct IMC efforts to the consumer alone. You must look closely at your chain, selectively target the most important groups, and develop IMC programs to address their needs.

5. Selling Environment

Finally, you will need to think through issues connected with the selling environment that present communication problems or opportunities. This involves both "formal" issues like laws and "informal" considerations like key influentials who need to be dealt with.

Issues here include:

- What is your type of distribution outlet/system?

For example, if a key marketing goal is to increase contraceptive prevalence among the rural population, where distribution is through community based salespeople, resources should be directed more towards basic training and sales aids than display units and posters.

Additionally, the capabilities of the salespeople as well as the complexities of the products they are selling will drive the type of sales assistance they need. In Ghana, for instance, the training and materials for various Women's Associations differ. Materials for the Market Women's Association (people who are not usually involved in health and family planning issues) have a different focus than those for the Mid-wives Association where the group is trained in the female reproductive system and its needs. Materials of a technical and non-technical nature are required to serve both groups' needs.

In situations where the retailer has little contact with distributors, we need to think through how to get product information to the retailer so it is passed along to the consumer.

- What is your competitive environment?

The overriding goal in virtually all CSM programs is to get non-contraceptive users to contracept. Our competitive environments are thus very different from those of private sector brands. However, we can find ourselves needing to switch consumers from traditional methods of contraception to modern methods or from less effective methods to more effective methods. What types of advantages can we leverage for our products?

We need to understand where we are sourcing our business from to spur growth. Even new contraceptive users will make decisions based on knowledge of a given set of brands and methods, and we need to establish preference for our products at that point.

- What is your regulatory environment?

What media and legal restrictions exist?

In many countries, contraceptive advertising is governed more by policy than by law. If TV advertising can only be shown after 9 p.m., are we sure the target audience is watching? If broadcast places significant restrictions on the amount of brand sell in our commercials, shouldn't we make sure there is a role for print or brochures in the media plan? If we're not sure how the governing officers of television stations will react to our commercials, doesn't it make sense to involve them at the storyboard stage to maximize our efficiency?

These things are not always easy to predict. For example, in Trinidad, condom advertising specific to the Panther brand was developed for the Panther introduction. Although the CSM team tried to informally lay the groundwork with the governing officers of the television stations for approving the introductory commercials, the commercials were censored once they were seen. The CSM group had to revise the commercials to largely become generic family planning advertisements before they could air.

This leads us to ask who do we need to influence and how? Many opinion leaders tend to be more conservative than the population in anticipation of public outcry. In these instances, it may make sense to move more slowly into mass communications. For example in Morocco, the launch of Protex condoms proceeded cautiously. Intensive public relations and radio, rather than television advertising, was used for a low profile approach. As a result, public outcry has been virtually non-existent and sales have consistently exceeded expectations.

In sum, thinking through these five issues upfront and recording relevant considerations will help illuminate key communications goals, opportunities and obstacles. Then you can approach planning from a total standpoint with appropriate priorities. For example, rather than simply knowing you have a brand awareness issue that advertising should "fix," you will have thought through:

- Why the awareness issue might exist,
- Who needs to be influenced to "fix" the problem,
- How to reach these consumers and influentials in ways that might be unusual and more impactful than the traditional use of mass media, and
- What competitive and regulatory issues you may be up against so you can diffuse them.

This type of evaluation provides a springboard from which the IMC planning process can proceed.

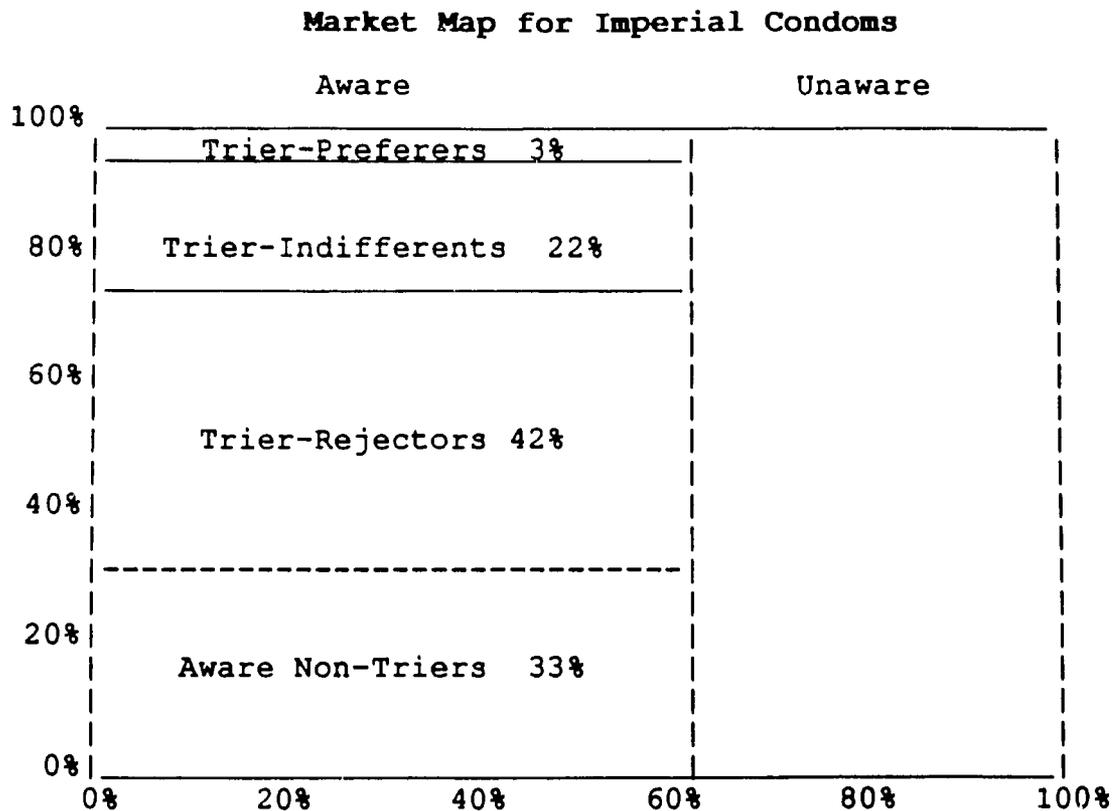
C COMMUNICATIONS PLANNING

Now that you've identified the key considerations that will affect communications decisions, you are ready to move to IMC planning. As you know, it is the marketing objective and strategy that drive all other objectives. Therefore, crafting the marketing strategy particularly carefully and assessing its communications implications is essential to the IMC planning process. You will find yourself in a better position to reassess or redefine your overall marketing strategy having gone through the five-step IMC process of defining key communications considerations.

Marketing Strategy

The marketing strategy represents a further definition of the marketing objective. It provides the "umbrella" concept under which all of your communications and promotional strategies fit. This unifying strategy helps you bring synergy to your marketing plans. Our primary interest with IMC, however, is in how the marketing strategy guides the development of communications programs.

There is no set "formula" for identifying the marketing strategy. However, one device called the "market map" may be helpful. Here's an example:



The horizontal dimension indicates the percentage of the market that is aware of the brand -- in this case, 60% are, indicating a mature brand. The vertical dimension shows the % of the market that have tried the brand -- in this case, 67% of those who are aware of the brand have tried it (another indication of its maturity). This chart further breaks the "aware-triers" into those who prefer it (3%), those who are indifferent (22%) and those who have rejected it (42%).

How do we use this information? The first step is to generate potential marketing strategies based on this data and decide what looks worth pursuing. The second step is to define the problem. In other words, what do we need to know to achieve the strategy we've set?

Let's generate some specific strategic alternatives to understand the thought process we must go through. Based on this market map, we might want to:

- Build awareness among the 40% of the population who don't know our brand, or
- Generate trial among the aware non-triers, or
- Convert indifferent triers into regular users, or
- Convince rejectors to re-try the brand, or
- Build usage among preferers.

Which of these look promising? Since 60% of the market are already aware of the brand, building awareness among the remaining 40% might be a worthy strategy. While 60 percent is not a particularly high level of awareness in the population, the 40% who don't know about it may be out of the mainstream and expensive to reach (e.g., live in isolated areas, insufficient income to purchase CSM products).

Another viable marketing strategy involves getting more aware - non-triers to try the product. The key is to understand what the barriers to trial have been. In other words, we must now define the problem. Market research and insights from thinking through your brand's IMC considerations are fundamental in helping you here.

In the case of a CSM product, say an OC, is the problem lack of availability? Product-related fears or complexities? Too high a price? Inertia? Lack of availability suggests a distribution issue which may require additional trade promotion incentives. Product-related fears or complexities may suggest the need for corrective advertising that dispels these fears, in-store educational brochures, or better education/promotional materials for retailers. It may also suggest stepped-up public relations efforts. Too high a price may mean that the OC is just too expensive or that consumers don't perceive it as a good value for the money. If it is too expensive, a focus on consumer promotion involving incentives like price reductions or premiums may be advisable. If the OC is perceived as a bad value for the money you must try to understand why. Perhaps the problem is a packaging issue. Or maybe it reflects a product-related issue. Finally, if the issue is inertia we may need to use advertising more frequently to remind consumers they need to contracept, or we may need more evocative, compelling advertising. The answers to these questions will tell you how easy or difficult, and costly or inexpensive, achieving this strategy will be. You will then know how to proceed.

Another strategic alternative would be to direct the marketing strategy toward converting "indifferent" triers. Here we must first understand this indifference to see if it can be addressed with communications tools. Perhaps the reasons for the indifference can be addressed with more targeted advertising and/or better price incentives. But if this is simply a group who buys whatever is cheapest, they may never be converted into loyal users which makes them less attractive.

You may also want to look more closely at "rejectors." In CSM programs, a significant number of these may be "lapsed users" who may be reconverted through educational efforts and communications directed at middlemen, encouraging them to endorse our products and counsel consumers on correct use.

A strategy directed at "preferers" might be important if a new competitor is entering the marketplace who might attract them. Or it may be valid if you see opportunities to build volume by increasing preferer frequency of contraceptive use. Otherwise, this is a group whose loyalty can usually be sustained even when embarking on a marketing strategy against new targets.

The main conclusion here is that setting the marketing strategy depends on the state of the market and knowledge of the consumer, which must be obtained from market research. This information is critical in pointing us in one direction or another. If the strategy has significant communications implications, we need to understand what these are and focus our energies. What is most important and will help us best achieve the marketing objective?

Communications Objectives

Building on the previous example, let's say our marketing strategy is as follows: "to build sales among aware, non-triers of Brand X condom," and that we believe that the major problem traces to a persistent perception that condoms are only for extra-marital use. We might thus develop the following objectives for some of our communications components:

Advertising objective: To persuade the target audience that Brand X condom is an acceptable family planning product, so they will use at home instead of relying on their wives to contracept.

**Public relations
Objective:**

To encourage members of the medical and pharmaceutical communities to advocate condom use as a family planning tool.

**Consumer promotion
objective:**

To generate trial using high impact, franchise building events.

**Trade promotion
objective:**

To provide incentives for the trade to feature and promote Brand X condoms.

Note that these objectives are integrated and focused, and relate back to the common marketing strategy.

D. WHAT IMC CAN DO

Let's step back now and summarize what we've learned about IMC and what it can do for us in CSM programs.

We have learned to approach the communications process strategically, not piecemeal. IMC encourages us to go through pre-planning disciplines to gain new insights into key marketing and consumer issues and their communications implications (e.g., spheres of influence in the consumer's life, the selling chain, lifecycle stages).

We have learned how to fine tune our marketing strategy and identify individual communications strategies that work synergistically to achieve marketing objectives. We have also learned that using a variety of communications components is critical to help us better achieve CSM marketing goals.

In sum, IMC is the critical component that helps us:

- DELIVER OUR MESSAGE WITH "GREATER IMPACT"
- EXTEND OUR "REACH," and
- INCREASE OUR "RETURN ON INVESTMENT"

How? We achieve "Greater Impact" because:

- The various channels of communication allow us to repeat our message in many different environments thereby reinforcing the contraception story.

- The use of paid and non-paid for media, and our ability to engage key opinion leaders, adds credibility to CSM programs.
- We are also able to get our messages to multiple audiences with facts that will be relevant and persuasive to them.
- Finally, the multiple channels let us address the complexities of the CSM sale so that consumers ultimately can feel that contraception is socially, economically and personally acceptable.

We extend "Reach" because our message is communicated in a variety of places, from editorial media, to the workplace, to point-of-purchase, to distribution outlets, to the community, to symposia, etc.

Finally, IMC helps increase our "Return on Investment" because:

- Our recognition is increased by the many communication channels we use,
- We can develop deeper and more lasting commitments from consumers and opinion leaders whose needs and anxieties have been addressed by our programs, and
- We are better able to sustain the behavior change we seek, because our message has been driven deep into the consumer's psyche.

Let's move now to a fuller discussion of the various IMC tools. The better we understand how to make these tools work for us, the more imaginative we can be in using them to accomplish our communications goals.

Section #2
"ADVERTISING"

ADVERTISING

A. DEFINITION AND CONTEXT

Advertising can be defined as "any paid form of nonpersonal presentation of ideas, goods and services by an identified sponsor." It is one of the IMC tools you are probably most familiar with as both a manager and consumer.

Advertising is a particularly important tool in the CSM world. While many of the same advertising techniques can be used whether you are advertising a soft drink or a contraceptive product, the objectives differ. In the CSM world, we are asking consumers to make fundamental behavior changes, not just to try a new beverage. As we said earlier, this is a high involvement decision which requires persuasiveness and positive reinforcement to sustain. Advertising is helpful in both of these areas.

As CSM Managers, we must always remain sensitive to our advertising environments. For instance, we may find we must move cautiously in advertising CSM brands in new programs.

In some instances, regulations and policies prevent us from being brand specific, making it necessary to sell only the method. In others, either the method or the brand must be submerged into a generic family planning message. But regardless of the circumstances, there are a host of positives that surround contraception that can be leveraged provocatively to tell our story. For example, the better quality of life people can have for themselves and their families by contracepting, is a powerful idea -- much more so than the benefits a new soft drink could claim. Let's look more closely at what advertising can do for us.

B. CAPABILITIES

The effectiveness and types of media we have access to in CSM programs varies by country, but includes at least some of these: television, radio, print, outdoor, cinema and transit. Advertising can accomplish a variety of goals for us:

- Reach many people quickly
- Call attention to an issue
- Evoke feelings and emotions
- Educate

- Create an impression or perception
- Persuade/motivate
- Inform
- Remind
- Generate positive attitudes

Some of advertising's biggest strengths for CSM programs are: 1) its efficiency in reaching a broadscale audience, 2) its ability to dramatize a product or service, and 3) its potential to legitimize a message by its public presentation. In areas where mass media is well-developed it can reach large groups of people extremely cost effectively. It also reaches the people dramatically through various creative techniques and the use of sight, sound and/or motion to persuade. Finally, one example of advertising's ability to legitimize messages can be found in Barbados. In this instance, the initial Panther condom ads generated public outcry because it was the first time condoms had been advertised on television. Fortunately, the ads remained on TV. The response served to get the subject of contraceptive advertising out in the open, presumably desensitizing it. One year later, new, stronger brand-sell Panther commercials are airing without negative community response.

But advertising as a communications tool also has its limitations: 1) it is a monologue, not a dialogue with the audience, 2) if done poorly, it can generate credibility problems, and 3) there are often restrictions in how we can express our message in different media. If aware of these limitations, however, we can find effective ways to work with and/or around them.

C. RESPONSIBILITIES

Specific CSM Manager responsibilities will be noted throughout this section when we discuss the various aspects of the advertising process. In general, the CSM Manager provides vital input for advertising -- both creative and media development -- in the early developmental stages. He then moves into an evaluative role, where leadership, sound judgment and tact are invaluable skills in getting the best advertising on air.

D. CREATIVE PROCESS

The advertising creative process moves through four phases:

PHASE I: DEVELOPMENT AND EVALUATION OF CONCEPTS

Here we determine how we want our brand to be "positioned" or perceived by the target audience, relative to other contraceptive products and alternatives. This involves developing and testing simple "concept" statements that tell consumers something of relevance and value about what we are marketing. The strongest concepts will later form the basis of our advertising strategy.

PHASE II: STRATEGY DEVELOPMENT

Based on the preceding step and additional marketing analysis, we are able to proceed with strategy development. This is where we develop a specific copy strategy which provides the blueprint for subsequent creative work.

PHASE III: DEVELOPMENT AND EVALUATION OF THE EXECUTIONS

Based on the copy strategy, the advertising agency now develops and tests a range of advertising campaigns to determine the most compelling for the target audience.

PHASE IV: PRODUCTION

Based on the preceding test results and judgment, the strongest advertising campaign is finalized and produced to go on the air, in print, etc.

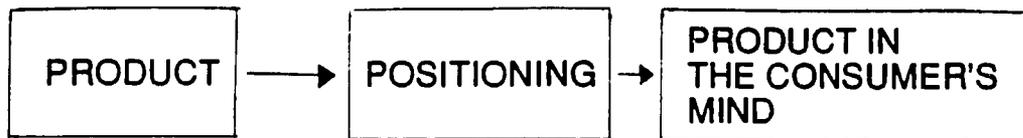
PHASE I: Development and Evaluation of Concepts

Positioning

Here we must determine how we want the target audience to perceive CSM products relative to other contraceptive brands and alternatives. In other words, how can we "position" our brand so that the consumer finds it valuable and distinctive?

The standards which consumers use to position products in their own minds, whether subconsciously or not, reflect a combination of elements. These include price, product benefits, the importance and exclusivity of those benefits, the emotional properties of the product, their experience with it, what they've heard about it -- all judged in the context of similar standards for competing products. Our focus here will be with positioning in the context of advertising communications. All marketing elements are interrelated, however, and their positioning must be consistent.

One way to think about the positioning process is as follows:



The positioning we create for our products is the critical link that transforms a simple product into something the consumer thinks is important to have. It must be rooted in product reality (e.g., you wouldn't market a Jeep as a luxury motorcar), and it must be read through the eyes of the consumer (be consistent with their fundamental beliefs about it). You would not position a condom with a name like Rough Rider, for example, as the condom for mild-mannered homebodies who have sex once a month.

Positioning is important in distinguishing one brand from another in the same category, particularly among parity products. If you think about your own perceptions of different advertised products or services in the same category (say fast food or cola beverages), you may find they evoke different images in your mind for both the product itself, and the people who use it.

Concept Development

The concept development stage is when we identify and evaluate various ways we might position our product. This involves developing simple concept statements that contain one idea (e.g., "Use Panther condoms for protection when you want it"), and exposing them to consumers in focus groups to find the strongest one. The best of these concepts will later form the basis of an advertising strategy (Phase II).

This is not as easy as it sounds. Coming up with alternative concept statements requires that we are: knowledgeable about the marketplace, clear on our advertising objectives and thoroughly understand the target audience. Understanding the target audience cannot be overemphasized. We don't decide in a vacuum how we want consumers to perceive our products -- They tell us what is acceptable.

The need for effective positioning remains true even if we are in a situation where we can only advertise a particular contraceptive method (e.g., oral contraceptives) or family planning generically. Regardless, we must still find ways to position the idea of oral contraceptives or the idea of family planning as desirable behaviors versus other alternatives.

Other Target Audiences

Our primary focus in this section will be on developing positioning concepts for the end-consumer, since this is the group who ultimately decides whether or not to purchase CSM products. However, the underlying principles hold true in developing communications messages for other target audiences (e.g., influentials, opinion leaders, physicians) to be dealt with later in the module. That is, we must understand the target audience's needs and the communications environment, to determine how to craft our messages most effectively.

Responsibilities

It is the advertising Agency's responsibility to actually develop a variety of concept statements for focus group testing. However, it is the CSM Manager's responsibility to provide the Agency with sufficient marketing information so strong concepts can be developed. You must also make sure all appropriate concept areas are addressed.

Process

Briefly, the steps to go through involve:

1. Analyzing the marketing situation
2. Finalizing concept considerations (including the role of advertising and the target audience)
3. Developing concepts
4. Evaluating concepts

We will spend most of our time on points one through three, as the fourth will be covered in market research training. As this process evolves, it is important to remember that it is more of an art than a science.

1. Analyzing the Marketing Situation

The CSM Manager, working with the Agency, should begin by gathering and analyzing existing information about the relevant CSM product. This is important, because one must understand what is going on in the marketplace and have the right perspective on the target audience, to get a feeling for potentially viable positioning concepts.

The CSM Manager should compile all primary data on the product involved; the Agency should provide relevant secondary data (e.g., on competitive copy, the target audience, etc.).

General sources might include information from KAP studies (knowledge, attitudes and practices), tracking studies, previous focus group research, usage studies, etc. Historical perspective can also be important. While the CSM Manager must use discretion in determining what is important to analyze, specific areas to look at might include:

- Category data (description, size, structure, etc.).
- Our product and competitive products: performance and activities (product characteristics, share, spending, positioning, pricing, copy, new product activities, etc.).
- Consumers (demographics, "product" purchase and usage behavior, "brand" perceptions, wants and needs, lifestyles, beliefs, misconceptions, etc.).
- Environmental data (economic effects, regulatory trends, etc.).

Advertising Concept Considerations

Using this data, as well as the relevant facts and hypotheses from the pre-planning considerations, (see Section 1B), the CSM Manager and Agency should next confirm:

- Marketing objectives and strategies
- Advertising objectives
- Target audience definition and dynamics
- Key communications problems and opportunities
- Competitive communications activity
- Policy, media and regulatory concerns that may affect communications.

If additional research is needed to clarify important issues (e.g., target audience perceptions), it should be conducted. Clear consensus in these six areas provides the Agency with some important guidelines for creative development. Agreements should be documented in an advertising fact book.

This is also when the CSM Manager should advise the Agency of any mandatory concept areas to be executed, based on past experience or experience from other CSM programs (see next section on Developing Concepts).

Two of the preceding six areas will play a particularly important role in the Agency's concept development process -- setting the advertising objectives and the defining target audience. Let's look at them more closely.

Advertising Objectives

Advertising objectives are marketing statements that explicitly state what you expect advertising to do for the CSM program. When crafting objectives, it is helpful to think through: who the target is (e.g., user vs. influencer), exactly what you want the consumer to do as a result of seeing the advertising (e.g., use the product more regularly; see a physician) and the behavior choice we are asking consumers to make. Specificity in all three areas helps ensure that the Agency stays on the right track in developing relevant concept alternatives.

Here are some examples of alternate advertising objectives that will lead to very different concepts.

The objective of advertising is to:

- Raise awareness among the target audience about the positives of family planning versus not using birth control.
- Educate the target audience on the correct way to use VFT's so they will stop incorrect practices.
- Ask the target audience to visit their doctor to find out more about oral contraceptives as opposed to their current method.
- Convince the target audience that condoms are appropriate to use with their wives, rather than just extra-maritally.

Target Audience "Profile"

Since the effectiveness of our entire positioning depends on finding provocative ways to tap into the consumers' psyche, we need to construct a descriptive target audience "profile" prior to concept development. This should be a joint CSM Manager/Agency effort.

During the marketing planning phase you will have identified the target audience for your CSM products (e.g., men 15 - 29) based on appropriate marketing criteria (e.g., size of market, purchasing behavior, etc.). We now need to move from "what" these people are to "who" they are. Do we need to reach actual users or influencers? What considerations in their lives govern their attitudes and behaviors? Do they think one way but act another? We need a precise definition of these prospects to have the best chance for success.

To construct the profile the CSM Manager and Agency should thus take another look at target audience:

- Demographics
 - Knowledge and beliefs
 - Attitudes
 - Habits and practices
 - Lifestyles
- 
- toward family planning
and contraceptive
products and brands

The high-involvement nature of CSM decisions (see Section 1B2, Consumer Behavior) and the consumer's point in their "lifecycle" (see Section 1B3, Consumer Lifecycle) should be considered. As you recall, since CSM products are high-involvement, the consumer will be thinking through his or her decision to purchase quite carefully before taking action. Additionally, if they are at a stage where they are largely unaware of our CSM product offering, their information needs and the thrust of the ultimate advertising message may be different than if they are at the "interested" or "knowledgeable" stage.

It is sometimes helpful to think of the target audience as a person when crafting the profile. The prototypical target is given a name, a place to live, a family and a set of attitudes and values. This information must be logical and consistent with the information from research. But it also should project a vital presence that becomes the person to whom we tailor our communications. Here's an example of one such profile for a prospective oral contraceptive user:

"Raharas Sapta is 22 and has three young children -- Mantra (4), Geerda (2) and Nina (9 months). She and her husband Ruddy live with the children in a small, two bedroom house outside of Surabaya. Ruddy is a responsible father who works nights at a local factory and even tries to pick up odd jobs on weekends. But the money is not really enough.

Raharas is always so busy. She loves her family but someone always seems to be sick, and the cooking and cleaning and washing are endless. Her younger sister used to help out but now she is married too.

Ruddy thinks three children are more than enough and Raharas agrees. But she is very fearful that she will become pregnant anyway -- Nina was a surprise. Raharas tried various brands of oral contraceptives in between the births of Geerda and Nina but did not find the experience physically pleasant. And it was hard to remember to take the pills every day. She really doesn't know where to turn."

3. Developing Concepts

It is extremely important to develop and test a range of concepts. We must make sure this process uncovers the best concept areas to incorporate into the strategy. And it is more cost efficient to push into new positioning frontiers at this stage, than it is when the Agency is developing full-blown executions.

Structurally, concept statements should be simple and clear, containing one idea only. Concepts should also be distinct from one another. Recent examples for Panther condoms in Trinidad are:

- Be a responsible man, use ...
- For family planning, use ...
- Because you love her, use ...
- For protection when you want it, use ...

Even though these are short statements, consumers in focus groups read a lot of things into them.

You can also see from these examples that concept statements often express perceived subjective benefits rather than just objective product attributes. This is because what makes a concept meaningful often has less to do with the way the product functions and more to do with what value the product can have for the target audience's life.

For example, objectively speaking you could tell men to use Panther condoms because they prevent pregnancy. That is what the product does. But subjectively, it might be more meaningful to tell men to use Panther condoms to stay in control of their lives -- so they don't end up with the responsibility of a child before they are ready.

There are several macro-concept areas that should be explored in all CSM programs based on proven results in the field.

Macro-Concept Areas

These macro-concept areas have evolved from seven years of CSM experience in 28 countries, so they are important to explore. Naturally, the specific phrasing you will need to use will vary due to in-country considerations (e.g., cultural, regulatory), and a desire to learn about the power of different expressions of the same idea.

These macro concepts lay out the broad ways each of the products can be viewed.

- Condoms

Condoms generally suffer from a negative consumer image. They are most often used outside of marriage to prevent disease (STD or AIDS). They are considered uncomfortable and inconvenient. As a result, condom use is not usually a main family planning method.

The two broad communications challenges we, therefore, face for condoms are: the need to legitimize condoms as an acceptable family planning method and the need to promote more consistent condom use. Several concept areas are worth exploring to meet these challenges:

- 1) Family planning

By explicitly identifying condoms as a family planning tool, this concept area encourages consumers to think about condoms as a contraceptive method rather than for disease prevention. Naturally there are various ways family planning might be characterized, depending on your environment (e.g., use a condom to plan your family size or better space the births of your children).

- 2) Male responsibility

This approach (on the "end-benefit" rung of the laddering process) has been successfully articulated in male-dominated countries like Morocco. It appeals to the man's sense of pride and self-esteem as the responsible head of the family. This works particularly well in cultures where providing for one's family is a social and cultural positive. Male responsibility platforms tend to make family planning more of a joint responsibility.

3) Caring husband/partner

This avenue is helpful in that it directly counters the perception that condoms are only for extramarital use. The concept of love or caring can be articulated in different ways, depending on local language, environment and customs.

This area might be appropriate in cultures where a man's love for his partner would not be considered a weakness. The current television copy in Trinidad, which stresses the caring, loving attitude of the man who uses Panther, reflects this idea.

4) Protection

Protection is a big concept area for condoms in CSM countries. It tends to cut two ways -- it signals protection from pregnancy in the context of family planning, but it also registers protection from disease without being explicit. In Barbados, the advertising campaign "Panther in your pocket, protection when you want it" is rooted in the protection macro-concept.

- Oral Contraceptives (OC's)

On the positive side, we've found that OC's are perceived as very efficacious. However, there are a number of negatives -- either real or perceived -- that can present barriers to trial or result in brand-switching and/or lapsed users.

Real side effects may include nausea, spotting, pain, bloating, weight gain, and headaches. Imaginary side effects can include sterility, multiple births, deformed babies, strong cancer likelihood, etc.

The broad communications challenge we face for OC's is to create an accurate and positive image for them. Negatives and myths must largely be addressed through educational materials and the proper promotion of oral contraceptives to appropriate middlemen. Advertising directed to consumers, however, can leverage the positives of OC's. We've found that these positives can fall into a couple of different categories, depending on the situation.

1) Effectiveness

This concept area can be tied to a number of things:

- **Effectiveness, in general.** This reinforces existing positive perceptions of OC's, and their main advantage versus some other alternatives.
- **Effective, temporary method.** OC's do not require a doctor's intervention to remove, and a woman can become pregnant shortly after stopping them. This can be meaningful.
- **Effective, convenient method.** OC's are more convenient than some other forms of birth control (e.g., VFT's), which may make them preferable.
- **Effectiveness of new varieties.** If you are introducing a new, low dose pill, you may want to stress its effectiveness in light of its other beneficial properties.

2) **For planning your family**

There are a number of concepts you can explore that relate to the benefits of planning your family's size by using OC's.

- **Better quality of life.** There are many advantages to limiting or planning a family's size that are meaningful to consumers (e.g., nicer home, better education). "A small family is a happy family" has been a popular expression of this concept area.
- **Control your life.** This is a positive, proactive approach, where oral contraceptives are characterized as a way to take control of your circumstances. One concept might be "have the number of children you want, when you want them." This might work well in cultures where women are less subservient to men, either in actuality or in attitude.

3) **Maternal/child health**

In this concept area, better maternal/child health is associated with the use of OC's. "Healthy mothers make healthy babies" might be one way to express this idea. Alternatively, "birthspacing" concepts can be developed to speak more directly to planning the number of years in between children.

4) To avoid unwanted pregnancies

This is a more negative approach to contraception, designed to heighten a woman's sensitivity to the problems of having children she is not prepared for. Often teen campaigns, where the consequences of unplanned parenting can be particularly devastating, use such an approach.

5) Other

In some CSM countries we may find ourselves in situations where consumers already understand the benefits of family planning and CSM oral contraceptives. The major barrier to CSM product use or trial may trace to a historical lack of availability or affordability. In these cases, you may want to tie the ideas of availability or affordability onto one or more of the more substantive concept areas.

- Vaginal Foaming Tablets (VFT's)

VFT's generally suffer from a lack of awareness in CSM programs, as well as negatives associated with their physical properties. These properties include messiness, a burning sensation, and inconvenience. Cultures that discourage women from touching themselves (Muslim), also present problems for VFT's.

The awareness issue is one advertising can address by virtue of media presence as well as memorable copy. The negative product properties are more difficult to deal with, but the key seems to be to turn some of the negatives into positives:

1) Convenience

VFT's may take a while to take effect, but they don't require a prescription, are easy to obtain, and can be used only when necessary. This could make them more convenient than other alternatives. This may be appealing for target audiences who only want/need intermittent birth control (e.g., older women, women without steady partners).

2) Safety

VFT's lack of hormones and relatively fewer side effects may allow them to be credibly portrayed as a safe product. Audiences for whom safety is a primary concern (e.g., older women or women who ' had trouble with OC's) may be prime targets here.

- Branded and Generic Family Planning Advertising

Any of the preceding concept areas can be made brand specific simply by changing the method to a brand name (e.g., "use Panther condoms because..."). However in some countries, brand, or even method specific advertising is not possible. Family planning must be promoted generically. In these countries the macro concept approaches should include:

- 1) Practice family planning
The benefits of family planning, including the better quality of life it leads to, can be explored here (e.g., a small family is a happy family, have only the number of children you can afford, etc.)
- 2) Maternal/child health
The importance of birthspacing can be addressed in this concept area (e.g., space your children so they will be healthy; healthy mothers make healthy babies).

Laddering

"Laddering" is one technique we can use to understand the range of promises or consumer benefits within each of the macro concept ideas. Quite simply, the steps involved are to:

- Be aware of the CSM product's "attributes" (its objective properties);
- Understand what "benefits" (value) the target audience might find in those attributes; and
- Understand the potential "end-benefits" associated with them (what the benefit brings to the consumer's life.)

This is not as confusing as it sounds, as the examples below will show. It is important to note that these areas all interlock, and that there may be some overlap among ladders as we get further away from specific product attributes.

Hypothetical Product:

IMPERIAL CONDOMS

Select Product
Attributes:

thin	strong	safe
good fit	portable	lubricated

Ladder 1

(Attribute)

Thin

(Benefit to user)

↓
Increased sensitivity

(Potential end-benefits of increased sensitivity)

↓
More pleasurable (for yourself or for her)

Greater intimacy/closeness

Way to show her you care

Ladder 2

(Attribute)

Strength

(Benefit to user)

↓
Protection

(Potential end-benefits of increased protection)

↓
Peace of mind

Reliability

Confidence

Ladder 3

(Attribute)

Portable

(Benefit to user)

↓
Convenient

(Potential end-benefits of increased convenience)

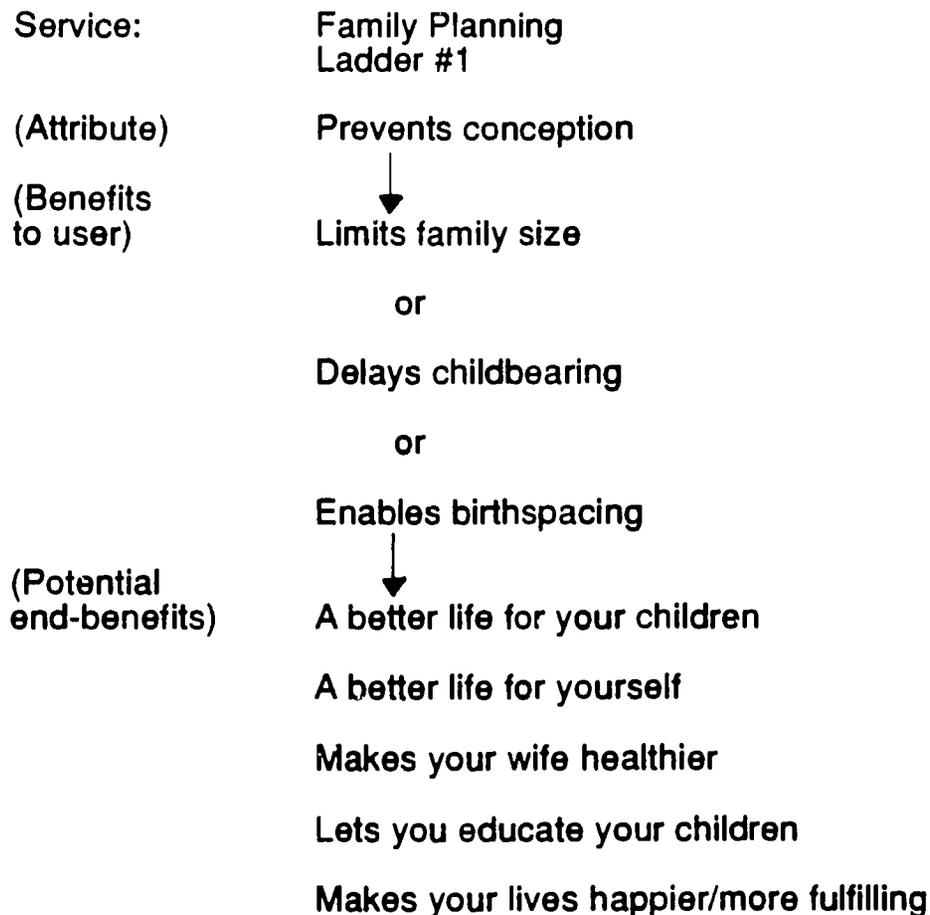
↓
Protection when you need it

Allows more control over your life

These ladders are by no means exhaustive, but they help make the point.

The directions you will want to explore in your ladders will probably vary by the target audience and role you've defined for your advertising. For example, Ladder #3 might reflect a younger, possibly unmarried male target where the role of advertising is to encourage more regular condom use. Ladder #2 might be appropriate if breakage has been a major problem.

This technique also works effectively in countries where generic advertising only is permissible (e.g., Bolivia).



Please note that some of the concept areas that are developed may speak directly to a type of user (e.g. the freewheeling "macho" man versus a sedate, responsible husband). Others may speak to the way you would use the product (e.g., birthspacing).

4. Evaluating Concepts

Once the CSM Manager is satisfied that the Agency has developed a good range of concepts, it is time to conduct focus groups. This is the final stage in the concept process. Usually, a maximum of four or five concepts can be tested.

The Agency must attend focus group sessions along with the CSM Manager and his staff. The purpose of this research is to narrow alternatives and discover the most meaningful strategic idea(s). Information learned from these sessions provides vital input for strategy development (Phase II). Make sure key points are recorded in a focus group write-up.

It should become apparent rather quickly which areas look most promising. The consumers will tell you what is interesting to them and what is not. It is important to listen carefully to how consumers respond to the various concepts -- how they see the "laddering" in each of the areas. Their comments can sometimes even open up new areas to explore, or suggest interesting new expressions of the same idea. It is critical to understand which of the macro concept areas are most meaningful to the consumer and why and to understand the laddering of each.

In sum, the concept development phase plays an important role in the creative process because it helps isolate the most compelling advertising positioning for us to communicate. It provides us with a relatively inexpensive learning opportunity, and should be thought through and well-planned. A meaningful concept development phase, helps ensure that the next phases of strategy development and execution move forward as productively as possible.

PHASE II: Strategy Development

Framework

Perhaps the concept stage has shown that the most motivating concepts are those which associate family planning with a better standard of living. Perhaps we have discovered that what excites consumers about Panther condoms is the fact that they are more reliable than others because of their quality. Or perhaps we have seen that oral contraceptives are most valued for the peace of mind they provide, because they are so effective. This information should now be reflected in the advertising strategy document -- the piece of paper that summarizes all the critical information the Agency needs to develop advertising executions. Let's talk about what is involved in developing the strategy.

First, why do we need an advertising strategy at all? At the advice of the experts:

"A great talent, sailing in the wrong direction will, like the lost pilot breaking the speed record, reach the wrong destination all the more quickly."

Bill Bernbach
Doyle, Dane, Bernbach

"Strategy is the key to success for an advertising campaign. It is not possible to succeed with a brilliant idea and superb execution of the wrong strategy, but it is possible to attain some success with no idea and a dull execution of the right strategy."

John O'Toole
Foote, Cone, Belding

Our goal in CSM programs is to achieve both the right strategy and superb execution. The strategy is the tool that:

- Provides an outline for creative work so the Agency knows exactly what needs to be communicated, to whom, within what restrictions, using what tone and manner and so forth.
- Coordinates efforts, forcing everyone to agree up front, to the basic elements that are important in the advertising and to ensure these elements work synergistically. That is, that the target is right; that the benefit is right for the target; that the benefit matches the purpose of the advertising, etc.
- Ensures that important points are not missed.
- Prevents false starts and wasteful digressions.
- Provides continuity. A good strategy only changes if something significant in the communications environment changes. It keeps the message intact even if CSM Management and Agency management change.

Responsibilities

While it is the advertising Agency's responsibility to draft the strategy, the Agency and the CSM Manager should work together to make sure the strategy is right. The Agency will need marketing facts from the CSM Manager to do its job well. These facts should likely have been provided, discussed and analyzed prior to concept development. Concept learning must also be incorporated now. The CSM Manager should meet with the Agency again at this point, to ensure there is consensus on all key marketing facts and concept learnings.

The process of writing the strategy requires deductive thinking -- the Agency will need to interpret the facts accurately and dig behind them to discern what is not so obvious. The CSM Manager must evaluate the strategy and make suggestions, as appropriate, to improve it. In cases where the Agency is not strong at strategic thinking, you may even find yourselves having to draft much of the strategy. To do this well, we need to take a close look at the strategies' components.

Strategy Statement

There are a variety of strategy formats that are used by different Agencies, but they contain much the same information. The preferred CSM format contains:

CSM STRATEGY

1. Advertising objectives
2. Target audience
3. Consumer benefit
4. Support
5. Tone and manner
6. Restrictions/Executorial Guidelines

1. Advertising Objective

We discussed this in detail in the preceding section. Assuming there have been no new marketing or communications developments since the concept stage, this objective should remain the same.

Please recall that the objective of the advertising must be a clear, explicit statement of what we hope to achieve. It must relate to the marketing objective and strategies, and state exactly what action or behavior change we are asking of the target audience. For example, if marketing goals are to increase Perle OC sales by +10% through encouraging more consistent usage, one advertising objective might be "to persuade irregular Perle users to use Perle exclusively instead of other brands."

2. Target Audience

This was also reviewed under concept development. Please recall that, there, several paragraphs were developed that personified the target audience reflecting their lifestyles, attitudes, beliefs and values as well as demographics. For conciseness, this longer profile may be distilled into one paragraph for the advertising strategy document, although the longer profile should be attached to provide fuller perspective.

It is important that the strategies target audience paragraph remain descriptive and personal. There is an industry belief that advertising works best when it is "a highly personal communication between two people." The advertising Agency needs to think about the target audience as a person, since it is individuals who purchase products, not some amorphous group of women 18 - 25.

It is also important to remember that a precise target audience definition is not overly confining. While there may be many potential prospects for purchasing our CSM brand, research and judgment will determine what group looks the most promising. Even when the target audience is narrow, the message will appeal to others who resemble the target in relevant ways (e.g., who share similar beliefs).

Here is an example of an abbreviated target audience definition, based on the longer profile we developed for Maria Delgado during the concept development phase.

Married women, under 30, with young children. These women generally live in crowded urban households and are financially stretched. They want a good life for their family and recognize they must limit its size. They know something about oral contraceptives and may even have used them, but their information is often spotty or erroneous. They have little energy left to learn about contraceptives and are generally confused about what to do for birth control.

3. Benefit (What Message)

In identifying a consumer "benefit," the Agency determines a "reward" to promise the target audience for buying or using CSM products. This is where the crux of concept learning is incorporated. The benefit might emphasize something about the product itself (e.g., the way it might be used), or capture some quality about the user (e.g., his lifestyle beliefs, attitudes). There are also different levels of benefits, as you recall from the laddering section.

A few important things to keep in mind:

- The benefit is in the mind of the consumer, not in the product. Products have attributes, not benefits. While some attributes easily translate into benefits, others do not.
- The benefit is a future experience. It is an experience promised to the consumer by the advertiser as a reward for buying or using the advertised brand.
- The benefit is a conclusion, to be drawn by the consumer from the campaign as a whole. It is not a copyline - the words used in the strategy may or may not ever appear in the advertising.
- The benefit should be single-minded. We know that consumers only remember a limited amount of the advertising message they hear. We must therefore concentrate all resources on communicating the single most important thing for the consumer to remember.

Let's look at several different benefit statements to get a better sense of how these factors come into play:

To convince the target audience that using a condom will:

- Protect against pregnancy.
- Give you a family you can provide for.
- Give you a better quality of life.

To determine advertising benefits in the CSM world, the Agency needs to interpret key concept learnings from the focus groups in the context of other marketing and communications information. Hypothetically, let's say we conducted focus groups in a male dominated, pro-natalist country where we need to limit family size. The concepts we tested were:

Plan your family so --

- 1)...The children you have get the attention they need.
- 2)...You can give your children opportunities you never had.
- 3)...Your wife will be a healthier person.
- 4)...You can afford to educate your children for a better life.
- 5)...You and your wife will have more time for yourselves.

Perhaps we saw that the most compelling concepts were numbers 1, 2, and 4, with #2 having an edge over the others. The Agency would surmise that practicing family planning was most compelling in relation to what the father could do for his children. They might thus express the benefit as:

To convince (the target) that if he limits his family size he can provide a better life for his children.

This benefit is not a restatement of a particular concept but a reinterpretation of what lies behind the strongest ones. And, as you can imagine, a number of potential campaigns might be written to this benefit.

4. Support (Why Believe It)

Advertising strategies cannot stop at identifying the benefit. They must provide some support or reasons why the target audience should believe it. "Support" refers to everything in the advertising that lends credibility to the advertiser's promise.

Often, it can be a fact rooted in the product or behavior we are advertising. For example, if we are advertising condoms and the benefit is "superior reliability," we might use the following types of support:

- Electronically tested
- Double-reinforced

Facts are often supported by demonstrations -- either literal or dramatic ones. Literal demonstrations are intended to be taken as true -- such as the visible relief a headache sufferer might experience on screen after taking an analgesic. In dramatic demonstrations, the product itself becomes part of a play.

Clarity Test

There is a simple test that will help you understand whether the benefit and support work together, and whether they are clear and single minded. You should be able to capture this information in the following statement:

To convince (the target audience) that (product X) will (benefit) because (support).

Let's take some CSM examples:

To convince husbands that they should encourage their wives to space their children because it will be healthier for them and their babies.

To convince married women that Blue Circle products are most suitable for them because they are prescribed by the people you can trust (doctors and midwives).

5. Tone and Manner

This is the one area of the strategy that is not finalized until Phase III. That is when advertising executions based on the same benefit and support but different tonalities will be tested. However, it is helpful to discuss what tone and manner are now, in the context of the strategy statement.

Tone and manner lend further credibility to the advertising message. While the "support" we've just discussed often involves factual reasons why the target audience should believe our message, tone and manner give the target "permission to believe," or "contextual" support for what we are saying.

Tone and manner are established through the use of creative devices that make a message credible. This includes things like music, lighting, the type of person cast in the advertising, wardrobing, etc.

The tone and manner section of the strategy does not indicate what these devices should be. Rather, it consists of several descriptive words or phrases that paint a picture of what the advertising should feel like. For Michelob beer, for example, which is positioned to appeal to a young, upwardly mobile audience, the tone and manner is:

- Special, but not elite
- Contemporary
- Exciting
- Stylish
- Masculine

The advertising tone that is set for a product will have a significant influence on how consumers perceive it -- some advertisers even go so far as to say it creates a "personality" for products. Consumers, for example, perceive Ivory soap as exceptionally pure, mild and gentle because for years, advertisers have been using tone and manner (as well as factual support), to encourage these ideas. Ironically, even though Ivory is a pure soap, it is not gentle -- in fact, it is one of the harshest soaps you can buy.

The range of potential tones advertisers use in strategies are diverse and result in very different types of advertising. These might include:

- | | | |
|------------|-----------------|------------|
| • Serious | • Lighthearted | • "Folksy" |
| • Factual | • Empathetic | • Bold |
| • Humorous | • Sophisticated | |
| • Dramatic | • "Hip" | |

Sometimes we find that brands in the same category adopt the same tone because they think it's the only one that is appropriate. For example, analgesics tend to rely on serious or factual tones because pain is considered a serious subject. However, other times, adopting a different tone from your competitors helps distinguish you. The humorous Isuzu car advertising, for instance, takes a very different tack with its "Liar" campaign from most automotive advertising, which focuses on performance and aspirations.

In CSM advertising, tone and manner vary considerably. The characteristics of our target audiences, the products we are advertising (ethical vs. OTC) and the overall "climate" in the country toward contraceptive advertising, will strongly affect what the appropriate tone is.

Further, where the product/program is in terms of its lifecycle has a direct bearing on tone (see Section 1B3). For program launches we tend to be more conservative than when contraceptive advertising has been airing for a while. Certain tones are more apt to generate public outcry than others. Since being accused of promoting promiscuity is always a concern we face, adopting a ribald, raucous tone is probably not a good idea.

But we have a lot of latitude in between quiet and conservative, and ribald and raucous. If you look at CSM advertising, almost all of the various "tones" available have been used. For example, Microgynon's introductory "My Little Secret" campaign in the Dominican Republic had a bolder, more upbeat tone than expected for the launch of an oral contraceptive. Secure VFT's advertising in Barbados has a serious, factual tone. Panther condom advertising in Barbados is clearly more hip and fun-loving than introductory Panther copy in Trinidad. And the stork advertising in Brazil uses a light-hearted approach to convey some important information.

Choosing the Tone

Determining the appropriate tone and manner is not a science, but it is not arbitrary either. It is closely tied to our advertising objectives, the dynamics of the category, the advertising environment, and the target audience. With sensitivity to these issues, make sure the Agency develops advertising that reflects several different tonalities for testing Phase III. Based on the test results, they should suggest several adjectives that capture the winning tone on paper for the strategy statement.

For example, in Sri Lanka, condom campaigns with three different tones were recently tested. These tones ranged from: 1) emotional and involving to 2) light-hearted and entertaining to 3) factual progressing to testimonial-like. Each of the different tones elicited a different response to basically the same message.

The important thing to remember here is that tone and manner provide us with an opportunity to bring credibility to our message while creating a distinctive, memorable personality for CSM products. Even generic family planning advertising can move beyond a wholesome, warm, sentimental tonality if there are others that are appropriate for the target and situation. We need to encourage ourselves and our Agencies to go beyond the obvious in this area, as well as in the definition of our advertising "benefit," if we want exceptional contraceptive copy.

Some of the work that's been done in the field of AIDS, for example, a highly sensitive social marketing communications area, shows how both benefits and tonality can be pushed when the climate is right.

6. Restrictions/Executorial Guidelines

Finally, this section should indicate any restrictions or guidelines the creative group should keep in mind as they develop executions. For example, if the word condom cannot ever be stated, they should know that.

Developing the right advertising strategies for your brands is an exciting communications challenge. It requires both a knowledge of the facts and a commitment to interpreting them with some boldness. While there are some guidelines to follow the end product is an art. And that's what makes it fun.

PHASE III: Development and Evaluation of the Executions

Framework

Now that we have the right strategy the Agency can move forward with campaign development. This is when the great Agencies distinguish themselves from the mediocre; the risk-takers from those who play it safe and predictable.

The Agency will go through a rigorous process at the "executorial development" stage. By that, we mean they will be creating, analyzing, rejecting, evaluating and improving numerous campaigns, only the best of which you will ever see. For each campaign they will identify an idea, and then flush this idea out in the context of an executorial structure and elements.

We must learn to encourage insightful ideas as well as superb executions from our Agencies. And in the CSM world where strong production values can be difficult to achieve, insightful ideas can become even more crucial.

Responsibilities

You and the Agency will have worked through the concept and strategy development phases together, so you should be operating from the same premises (of course, this will not be true if you change Agencies mid-stream). The Agency will initially move forward alone to develop campaigns. The CSM Manager will be reintegrated into the process to evaluate campaigns once they are developed. Guidelines to assist in this evaluation will be covered throughout this section.

With the right Agency and the right strategy you have an excellent shot at getting terrific campaigns. But for such campaigns to actually materialize, CSM managers must provide an environment where creativity can flourish. That requires providing direction for the Agency, but also giving the Agency enough latitude so it can do what it does best.

Creative Techniques and Structures

There are a variety of different creative techniques and structures that Agencies use. Understanding what these techniques are and why they might be appropriate, will improve your evaluation skills. Many of these techniques will be familiar from television advertising, although some work in print and radio as well. The following list is not exhaustive, but covers some major areas. The techniques are also not necessarily mutually exclusive.

Techniques

- **Authorities.** Authorities add credibility to the advertising message. Anyone who is a recognized expert in their field qualifies here. The authority you select must be relevant to the product being advertised. And their suitability must be obvious -- by their dress (e.g., a uniform), the setting (e.g., a hospital), in the copy, or because they are a well-known personality in the field.

In the CSM world, doctors, nurses or pharmacists might be good authorities for advertising ethical products, particularly if the target consumer is fearful or misinformed about the product. There may be restrictions on how medical personnel can be shown in advertising, however, that should be explored in advance.

- **Celebrities.** Celebrities help draw immediate attention to the product you are advertising, and can thus create a quick awareness boost. The right celebrity can add credibility to the message and increase the desirability of the product. Some advertisers use the entire celebrity persona; others, just their voices.

The trick with using celebrities is in choosing the right one. To work best, there should be a valid connection between the product and the celebrity. For example, Vickiana was a well known, sexy actress in the Dominican Republic. Therefore, when she talked about "her little secret", her oral contraceptive, you listened. It is also important to make sure the celebrity hasn't been overused in other commercials because that can detract from their credibility.

The celebrities' image will affect the image you want to convey for your product, so they must be chosen carefully. And there can be risks if your celebrity gets involved in a scandal. Finally, celebrities can be expensive. But if the fit is right, it may be worth the cost and risks.

As mentioned previously, a celebrity was used successfully in the Dominican Republic for the Microgynon introduction. Celebrity sports figures might be desirable for condom brands.

- **Music.** Music is a powerful tool that can bring emotion to your message, create an image for your product and sometimes even convey the essence of the message itself. It is always an important element, although its prominence will vary by commercial.

Music can fall into several categories. At its subtlest, it forms a backdrop that brings an ambiance to the commercial that can range anywhere from the serene to the dramatic to the whimsical to contemporary. Such scores are sometimes original, and sometimes they are not.

"Jingles" and full-blown "musicals" are two other ways music can be used. In both cases, original music and lyrics are composed for the product. People usually characterize jingles as more lighthearted ways to punctuate key copy points. "Musicals" are usually fully orchestrated scores that convey the story. In both cases, such music can offer important information. It can position a product, or create an image, or bring an enduring property to the brand. Such songs are often remembered long after the advertising campaign goes off the air.

"Parodies" involve taking an existing piece of music and rewriting it to fit a product or campaign. This can be a riskier proposition because it involves taking a well-known or favorite song and adapting it to a sales pitch. The best marriage is when the song and selling idea work in conjunction to drive home the idea. The worst case is when the music and product are so unrelated that they offend even the casual listener.

Music, in many of its forms, can play an important role in CSM advertising. The Barbados campaign is one example where original scores have been used.

- **Imagery.** Imagery, as the word suggests, is using visual symbols to create mental pictures or associations in the consumer's mind that reflect positively on your product. It is frequently used in product categories without a lot of differentiation, and where the products themselves make a statement to others about the consumer's tastes, status in life, etc. Advertising for perfumes, beers, liquors, cigarettes and cars often use imagery. Such imagery can relate to femininity, masculinity, sex and success, to name only a few.

Imagery could be a useful tool in CSM advertising. For example, the Panther name itself generates a lot of positive images: "masculinity, strength, some wildness yet an ability to be sleek, smooth and gentle" (Trinidad focus groups). This name, along with various related symbols, might work well in an image campaign built around the "Panther man."

- **Continuing characters.** Sometimes advertising campaigns use continuing characters as spokespeople for the message. These characters can be real people, animated characters, or even celebrities. Over the life of the campaign, they can become a household name, and provide instant recognition for the product. Such spokespeople need to be credible, and it helps if they are likeable (although that is not an absolute). In Egypt, CSM advertising used one such character.
- **Lifestyle.** Lifestyle advertising focuses attention on the user, more than it does on the product. Such advertising tends to work best when product differences are small and where the product's use tends to be social (not just functional). This technique is used a lot in beverage advertising where, for example, it may be combined with lots of imagery.

This technique has not been used, as yet, in CSM advertising.

Structures

- **Slice of life.** In this case, the advertising message is delivered in the context of a "real life" situation (e.g., two women discussing their family planning needs in their living room). The single situation allows the advertiser to develop a story line around the product that is involving and interesting, to bring depth of sale to the advertising message. If done well, it may personalize the product for the consumer. This has been done successfully in CSM advertising.
- **Vignettes.** Vignettes are a type of executional structure, where the commercial consists of several, self-contained scenes that each repeat a simple, relevant point.

For example, you might have three different couples in three different places who say why it's important to use Panther condoms. The advantage of showing the three couples, or three scenes can vary. It might be helpful to show the importance of people with different lifestyles. In Trinidad, the vignette format was explored to show the appropriateness of Panther condoms for Indians, Blacks and Caucasians.

This format is excellent for repetition of a single, important idea. But can become cumbersome if too much information is contained in each scene.

- **Problem/solution.** In this case, the action of the commercial revolves around one or more problems that are "solved" by the product by the end of the commercial. This is used as a means of dramatizing the benefits. Laundry detergent advertising, for example, frequently shows more than one dirty laundry problem that they are "uniquely" suited to solve. It is important that the balance between problem and solution in the commercial be relatively equal for this technique to work best.

This technique has also not been used in CSM advertising, but it could work quite effectively. VFT's, for example, can be set up to solve a problem of women who don't want to continuously be on birth control.

- **Testimonials.** Here, actual consumers directly recount their experiences with a product to the audience. Testimonials can come in a variety of forms. Some are "on-camera," where the interviewer asks consumers for their opinion of the product. Others are "hidden camera," where the consumer is unaware he/she is being filmed. Testimonials are another structure the advertiser can use to make the advertising message seem more believable, because they add consumer conviction to the promise. Hidden camera testimonials, in particular, can seem very authentic. Testimonials also can simplify complex product stories because they are very direct.

The major drawback with testimonials is that they can be dull because they are so realistic and there is not much of a story line. But, given an appropriate situation, they may be worth exploring.

- **Announcer voice-overs.** Off-camera announcers are sometimes used to tell the story line of the commercial. These can be third parties who lend an air of objectivity to the action. Or the characters themselves may recount a past experience off-camera.

Announcers can bring a softness to the story line as the audience watches the story unfold with all its imagery, emotion and so forth. This technique is a popular one, and might also work well in CSM advertising.

- **"Talking heads/stand-up presenters."** When a very direct, and authoritative selling approach is desirable (e.g., there are product complexities), some commercials use "talking heads" or "stand-up presenters" to convey the message. Such presenters explicitly convey the message on-camera with a minimum of distraction. The dynamism of the spokesperson, their dialogue, and the setting become very important in this format. Without sufficient creativity in one or more of these areas, this format runs a major risk of boring the target audience, thus losing its powers of persuasiveness and communication.

The "Secure" VFT advertising in Barbados provides one example of using a talking head. The stork campaign in Brazil is a particularly imaginative use of a stand-up presenter.

As the Agency goes through the process of copy development, instinctively, it will choose the technique that works best for the idea they want to convey. As CSM Managers, we need to recognize that there is no "simple right way" to execute a given strategy. There are a variety of techniques we should remain open to, to help make CSM advertising as distinct and involving as possible. Encourage the Agency to try new techniques for variety and interest.

Creative Evaluation

Once the Agency has gone through its creative development process, and a number of "executions" have been done, a series of meetings to review the work and make recommendations will be held. The process of creative evaluation is an important and sensitive one, and the CSM Manager must lead in making it as productive as possible. Getting exceptional advertising is a joint effort, based on clear direction and a mutual understanding and respect for the roles the Agency and CSM Manager must play.

The CSM Manager may find that he and the Agency hold different opinions on the quality and clarity of the work, and/or its appropriateness for the target. Here are some guidelines to help you evaluate what you have been shown and, hopefully, keep the process from becoming adversarial. They can be particularly useful at the early stages when new campaigns are being shown for the first time. Later, you will be looking at campaign revisions, so these guidelines, as well as the accuracy of the revisions, should be taken into account.

- **Understand the limitations of the rough work.** Storyboards, print layouts and rough radio scripts are straightforward communications devices. They will not capture the subtle nuances of tone, music and its effects, casting, visual impact, etc. They should be good representations of a clearly expressed advertising idea (expositions of the benefit and support statements). You can evaluate these ideas, the storyboard's logic, copy points, basic visuals, audio/visual coordination (TV and print), mnemonics (repeated visual devices), supers and so forth.
- **Recognize your biases.** Remember that the advertising must persuade the target, not you. In evaluating the work, put your own prejudices aside and think like the target might. It may be helpful to have a couple of additional, qualified CSM personnel at the meeting to help in this evaluation process. If the idea looks valid but you aren't sure how the target audience will react, plan to learn about the campaign later in focus groups.
- **Use the strategy as a guiding light.** CSM managers should be the guardians of the strategy. All the work that is seen **must** be faithful to it -- the advertising idea must be an exposition of the benefit and support. It is helpful to begin meetings by asking the Agency to review the strategy to focus everyone on it. If a campaign is off-strategy, it should be rejected.
- **Ask yourself if the execution meets the criteria for excellence:**
 - **Features the most compelling benefit.** Effective advertising focuses single-mindedly on the most compelling product benefit. Everything about it (words, graphics, sound, music) should work to support this benefit.
 - **Positions the product clearly.** Effective advertising positions the product in the target audience's mind as being different from and better than other products or alternatives. This need not be overly stated (and in the CSM world it probably won't be). But the advertising should seem to bring new meaning and importance to the product, behavior, or method.
 - **Generates trust.** A prospect will not buy from a salesman he does not trust. Effective advertising must not only speak the truth; everything about it must ring true. Even when fantasy is used, it should be something the viewer can share, accept, and find motivating.

- Breaks the pattern. Effective advertising excites the ear and eye with a look and sound of its own. It separates itself from surrounding communications, just as it separates the product from competing products. But it pulls this excitement from the product itself -- borrowed interest is not as compelling as intrinsic interest.
- Appeals to both heart and head. No sale is made entirely in the mind. All sales are made at least partly in the heart. Effective advertising thus presents more than practical reasons -- it invests the product with emotional values.
- Creates a personality for the product. Different types of products reflect different sorts of characters (e.g., sodas are fun, medicines are serious). Effective advertising translates the character of a product into a distinctive personality for it. Strong personalities can become one of the brand's most enduring properties.
- Is the execution a campaign? Sometimes the Agency presents an intriguing execution that is on-strategy, but is not really a campaign. That is, the idea is good for one or two commercials, but it does not have the enduring properties so many commercials can be written to it over time. Product improvement commercials often fall into this category where product news is the focus of the advertising.

Ideally, we want to have CSM campaigns. Brand heritages are most effectively built on the constant repetition of a campaign idea over time (witness Pepsi's generation advertising). If you aren't sure whether you are looking at a campaign, it is helpful to ask the Agency how they would "pool-out" (do another execution of the same idea) the campaign they are presenting. If everyone agrees that the execution is a one-shot commercial, that may be just fine. However, more work will need to be done later to find a long-term campaign.

- Don't torture the work. There is sometimes a tendency to take a campaign that is not really appropriate, and try to turn it into something else. This often happens when certain people are advocates of the campaign in question, or if there is something very likeable about it so people hate to lose it even if it's not quite right.

If a campaign can take modest revisions and be made acceptable that is one thing. In other words, if the basic premise is sound even though some of the execution is unclear. But if major changes need to be made to make it "on strategy," or it is an interesting executional technique with no idea, drop it early rather than torturing it.

- Exercise judgment, but test what you don't know. There are certain things that are obvious when evaluating work (e.g., if it is off-strategy). Other things are less so. If you think you've got a valid campaign to expose to consumers, test it. If the Agency thinks another campaign is equally valid, and you can't decide whether it is or not, test it. If you have two campaigns where the differences are subtle, pick one of the two and test it (research suppliers, or in-house agency research staff can help settle this one).

Media Limitations

Finally, to fairly evaluate creative work it's important to recognize that different types of media provide different creative opportunities and limitations. Not all media can address every aspect of the strategy in the same depth. Further, the message itself works best when it takes advantage of the unique properties of the media in which it will run.

If we recognize the capabilities of media up-front, we will be in a better position to ask the right things of the Agency, and evaluate their work in its proper context. Here are a few guidelines:

- Longer units = more depth of sale. As a rule of thumb, the longer the message unit is, the more depth of sale it can provide. You need to tailor your communications expectations by length.

A :30 commercial (TV or radio) can address all aspects of the strategy and provide some drama around the key points. 60 or :45 commercials provide the same amount of message, but embellish the story to add additional interest. A :15 commercial registers the brand's name and key selling proposition, and that's about it. It works best as "reminder" advertising. Similarly, in print, a larger ad will usually have more impact on the page and can communicate or dramatize more information.

This is not to say that longer is always better. It depends on your objectives.

- **Integration, not replication.** When we use more than one type of medium (e.g., TV and radio, radio and print), try to use the same campaign theme to increase its impact. But that does not mean pursue replication blindly. Trying to use your TV track as the radio commercial may be a bad idea, depending on the track. In Brazil, for example, they originally wanted to use the voice of the stork on TV, for radio commercials. They discovered it did not translate well into radio, however, and opted for another voice instead. On the other hand, print in Trinidad uses the same theme line and actors that are in the TV commercials.

We should expect the Agency to look at each medium, in its own right, to determine what works best creatively. They should then strive for synergies and integration as appropriate.

- **Television is visual.** The essence of television is visual, so the picture must tell the story. In fact, many commercials on air today work almost entirely without words, relying on the clarity and drama of the visuals.

When evaluating CSM commercials, assess their visual impact. Try looking at the visuals without the copy underneath to see if they work. Don't be thrown by the roughness of storyboard drawings -- you should still be able to tell what's going on. Once you are sure the visuals work, then look at copy and audio/visual synchronization. Every storyboard should have a logical visual flow.

A caution on copy -- don't get too wordy. English :30 commercials should contain approximately 65 words. If it is much longer than that, copy needs to be cut.

- **Radio is auditory.** Radio is theatre of the mind. It requires copy that stretches the listener's imagination, as well as dynamic voices, memorable music and sounds. Always ask the Agency to read radio scripts to you, so you can get a better sense of their auditory impact. Rough sound tracks and/or voice tracks are often part of radio copy presentations.
- **Outdoor must be obvious.** Outdoor advertising, and billboards in particular, are selling to an audience in motion. They require high visual impact, simplicity, bold lettering and art, and the communication of one, simple, big idea. Experts say that you will have the consumer's attention for no more than 10 seconds. There is, thus, no time for an embellished message.

Don't expect billboards to do more for you than reminding consumers about the brand and its key selling message. Other media must provide you with the important facts about the depth of sale.

As an aside, try placing billboards close to the outlet or family planning clinic where CSM products are distributed for extra impact.

- Print needs focused verbal and visual impact. Print, in any form, needs high verbal and visual impact. It is the most cerebral format, so we need to force the involvement of the reader.

If you are evaluating print ads in magazines, newspapers or posters, first look at the overall message -- the headline and illustration -- and react. Don't agonize over body copy (it's usually not read). The headline should flag the prospect, offering a compelling idea in a memorable set of words. That idea should relate to the advertising benefit. Graphically, look for simple layouts, containing a key visual(s).

As an aside, there are many ways to handle print, especially in magazines, that can increase its impact. There are full page ads, spreads, gatefolds (ads that open up), ads on successive pages. Some of these forms might be adaptable to posters too.

Qualitative Testing Evaluation

The culmination of the creative evaluation stage is to end up with campaigns to expose to consumers in research. The market research module will look at the specifics of the qualitative and quantitative testing of advertising campaigns. Suffice to say here, that you want to test a range of campaigns, with testable executional differences. Remember that you will be looking for the campaign with the strongest idea. You also need to determine the best tone and manner for your advertising.

Finally, you also want to test these campaigns in a common format (e.g., all storyboards or all animatics -- videotaped illustrated commercials where there is some movement). The format that your campaigns are tested in may vary, depending on the needs of the execution. Storyboards or rough videotapes of storyboards are the quickest, cheapest and most common forms of rough production in the CSM world.

It is rare, if not unheard of, to emerge from focus groups with the actual campaign intact that you want to produce. A report of the focus groups with copy implications will be critical to help the Agency revise the "winning" campaign, or, if everything has tested poorly, provide direction for doing additional work.

PHASE IV: Production

This section is specifically written for the CSM Manager and details what role the CSM Manager has to play in the Production Phase.

Framework

When the best campaign emerges from the previous phase, is revised and approved by you, full production commences. Production is a complex and technical process, best left in the hands of the experts. However, it is helpful for the CSM Manager to be acquainted with some of the steps involved in production, so that he can appreciate what is happening, understand the time and money required, watch out for danger signals, recognize when changes are most appropriate, and so forth. You will also have specific ancillary responsibilities.

As with most other things, in production you get what you pay for. This is true whether it is the Agency that directs and produces the spot, or whether they hire other professionals in the field to do so.

In the CSM world, the technical infrastructures of various countries can vary dramatically. Thus, we often see dramatic differences in finished production. And it is not unheard of to have to go outside the local environment to find unusual talent, create special effects, etc. (e.g., opticals for the Barbados "Rap" advertising were done in Miami).

Responsibilities

The Agency and possibly outside "production house" personnel (e.g., director) are responsible for ensuring that the creative end-products you have approved (e.g., television storyboards, print layouts) are well produced. Throughout the production process you will be involved in various decisions of a creative nature (e.g., casting) and a technical nature (e.g., legal approvals). These decisions will be noted in the upcoming sections.

Production Types

In the following sections, we will review production procedures for four types of media: television, print, radio and outdoor.

1. Television

There are three stages of television production:

- **Pre-production** -- this involves all work that goes on before the day of filming, including casting, estimating costs, legal approvals, production bids, selection of a production house, etc.

- Production -- the actual days of filming or taping
- Post-production -- the completion of the film or tape, including editing, special effects, sound tracks, etc.

Pre-production

The CSM Manager should be involved in various aspects of pre-production. These will include taking the storyboards through various legal or technical approvals, approving estimates, approving casting, and attending the preproduction meeting.

- Technical/legal approvals. As soon as a campaign becomes a serious candidate for production, you must submit it for legal and/or technical approvals to key parties. Depending on the situation, such approvals may involve Ministers of Health, Censorship boards of television stations, etc.

You should get these approvals before any major production steps are taken to avoid incurring unnecessary costs. Public relations efforts and the influence of various members of the advisory Councils come into play now. The CSM Manager and the Agency should work together to secure approvals. It is critical that such approvals are formal to avoid problems later. For example, in Trinidad, the Board of Television required major rewrites of the launch advertising for Partner condoms before approving it to air. This could have been a very costly mistake if production was already underway.

- Estimate approvals. Prior to production, the Agency should give the CSM Manager an estimate of the commercial's costs. If they are using outside experts (e.g., production houses), they may competitively bid the job. The important thing is to understand and approve all costs before production starts.

There is no rule of thumb for how much a "typical" commercial should cost -- costs vary dramatically by commercial. You can tell, however, even at the early storyboard stages, if a commercial looks expensive. That is not necessarily a reason to reject it, since it may be able to be executed less expensively. But, some types of executions only come to life with excellent production -- otherwise they become farcical.

Here are some factors that can add to the costs of a commercial:

- Location shooting. This means that you go to an actual place or location to shoot the commercial (e.g., a beach). Transporting everyone to a location can mean extra transportation, a longer shooting day and overtime charges.
- Large cast. The more actors you use, the more it costs.
- Celebrity talent. The fee is almost always negotiated in advance, separately from bidding on the storyboard. Such fees can be expensive.
- Night or weekend filming. If you need a discotech or clinic all to yourself, you may have to shoot at odd hours. That may involve overtime payments to the personnel involved.
- Complex opticals, special effects, etc. These effects may make the shooting day longer and costlier -- they will definitely add to editing time and money.
- Location and studio time for one commercial. Any storyboard with indoor and outdoor scenes will probably require more than one day of shooting.
- Expensive set construction. Elaborate sets cost money. It can often be cheaper to find a location.
- Special photographic equipment. Cranes, aerial photography, etc., cost money.
- Children and animals. They are often unpredictable and can cause delays.
- Casting. Prior to the pre-production meeting and in advance of actual production, the Agency will be holding casting sessions. The Agency conducts these sessions on their own. The CSM Manager should see the actors (either live or on a casting tape), be comfortable with them and approve them prior to production.

- **Pre-production meeting.** As the day of production nears and estimates, casting, legal/technical approvals have been secured, a pre-production meeting will be scheduled. The CSM Manager should attend this meeting. It will involve the Agency, the Director and key production house staff and probably a Futures Group expert. The storyboard will be reviewed in detail and objectives for each scene will be discussed. This is the Agency's meeting, but there are ways that you can contribute productively:
 - **The set.** Make sure you are comfortable with the way the set is described. For example, a big house with expensive furniture and decorations is too upscale to be appropriate for CSM audiences and products.
 - **Costumes and props.** Again, consider the image of your product. In a commercial shot close-up, the props themselves become the set.
 - **The product.** This is the real area of expertise for the CSM Manager. Look closely at how, when and where your product is used in the storyboard. If it comes in more than one size or color, which should be featured? If the label is shown, it may need to be "color corrected" (clarified for filming with a lot of small type removed). Make sure the art director knows what can and can't be removed from the label.

Production and Post-Production

For general perspective, the shoot will occur sometime after the pre-production meeting. The CSM Manager may or may not want to attend the shoot. Attendance is not necessary, since the Agency is fully responsible to shoot the storyboard you approved initially.

After the shoot occurs, you will be asked to look at a "first edit" of the commercial. Visually the commercial is close to its final form, although it may look jumpy. It won't have dissolves (smooth transitions from scene to scene), titles, special effects or supers. If the actors speak on-camera, the sound is fairly final. But you won't hear an announcer, music or sound effects.

You should make sure that the commercial follows the storyboard, although sometimes the Agency may rearrange some scenes for a better flow of action. Make sure you are happy with what you see and hear. If you are not, speak up now because this is the cheapest point in the process to fix anything.

After the first edit the Agency finalizes the commercial. The final commercial contains everything you did not see or hear initially (e.g., music), and should reflect any revisions you requested.

2. Print (magazines, newspapers, posters, etc.)

As with television, there are three stages here:

- Pre-production -- Everything that goes on before an ad is shot, illustrated or typeset.
- Production -- All elements (visuals and type) are combined in final form for printing.
- Printing -- The process of getting the ad onto posters, into magazines or newspapers, etc.

Pre-production

Again, the pre-production stage is where the CSM Manager plays the biggest role. By this time you should have approved both the "layout" (a rough sketch of what the advertisement will look like with the headline lettered in) and "copy" in script form. Sometimes the Agency also prepares a "comp" (comprehensive layout), that is a more detailed sketch of the print ad for you to see.

You must secure any necessary legal or technical approvals prior to print production. The Agency will also provide you with an estimate of the ad's cost for your approval.

The Agency does not always hold formal pre-production meetings for print. Nevertheless, you should insist on knowing exactly what the Agency plans to do. Ask how the scene will be set, what props will be used for the photograph, etc. If an illustrator is being used, you might want to see some examples of his style in advance.

Production and Printing

There are two main items you need to approve during the production and printing phases: the mechanical (with art as necessary), and a proof.

The mechanical is an exact replica of the ad. It includes the headline and copy that have been set in type. Additionally, a black and white photostat of the photograph, illustration or other artwork is positioned on the mechanical. You should see and approve actual artwork separately.

Since the mechanical is an accurate guide for the position and elements in the ad, you must be comfortable with it. Make sure it represents a translation of the layout you approved. Make sure the copy is right. Proofread everything. Then approve it for printing.

The Agency will subsequently be receiving "proofs" (early printed versions of the ad) on almost a daily basis. They will be checking them to make sure the colors look right. They may send you some samples of later proofs to see. Make sure you approve the final proof before the ads get reproduced.

It is not uncommon to find some variability in the ads that are reproduced and put into magazines, etc. This traces to variability in inks, paper stocks and printing presses. There is nothing that can be done about this, and most variation is usually acceptable.

3. Radio

Radio is one of the easiest production processes to understand, and it can be done quickly and usually more cheaply than the others. It, too, follows pre-production, production and post-production steps but they are less elaborate.

Once you have approved the Agency's recommended radio script, an estimate will be drawn up. As with all the other production processes, you should obtain any legal or technical approvals.

Live Delivery

Radio commercials can come in a couple of forms. The simplest is "live delivery" where the Agency provides a script to be delivered by the station's own announcer. The script will be accurately timed for length, but the announcer often gives some "bonus" time in actual delivery. They may also "ad lib" a little around some of the points. Needless to say, once you've approved the script your role is over.

Audio Tape

The production scenario becomes more complex for radio commercials produced on audio tape:

- Auditioning/Demos
The CSM Managers' first activity in tape production is in hearing audition tapes of the recommended talent -- announcers, music groups, etc. Sometimes the Agency may even provide a "demo" tape (or "scratch track"), that suggests the finished commercial, minus rehearsals and polishing. If you do not like what you hear you should speak up now to minimize cost overruns.

- Recording session
The next step is the recording session. The entire commercial may be recorded in one piece, or individual elements recorded separately. Voices and music, for instance, are put on separate tapes and then "mixed."
- Final tracks
You should be provided with a copy of the track from the recording session for final approval. Duplicates ("dupes") of the final approved commercial are then made and sent to the stations.

4. Outdoor

Outdoor boards are usually printed, and therefore don't represent a unique production process. Sometimes boards in high traffic locations are semi-permanent, and the advertising is painted on the board.

The CSM Managers involvement will be in the pre-production stage of outdoor. You will need to approve the layout and mechanical, the estimate, and secure any legal or technical approvals for the design and copy.

What makes outdoor different from traditional print is the size of the poster. The outdoor company takes the design for the board, enlarges and projects it on master sheets, and then lays it out on ten huge sections for printing. This series of ten sheets makes up the total design.

Cutouts or extensions can extend billboard areas, for a price. Overlays (called "snipes") can add copy over an existing board -- to change copy, list a local dealer, or announce a new date.

The key to keeping the costs down and getting the best reproduction is allowing sufficient time for production. This holds true for virtually every type of production -- TV, print and/or radio.

E. THE MEDIA PROCESS

No matter how good your advertising itself is, it does you no good unless it is seen by the right people, in the right places, at the right times with enough impact for the message to sink in and persuade. Quite simply, that describes the vital function that media planning must play.

The majority of your advertising budget will be spent on media, so the decisions you will be asked to make are significant. But you can't make these decisions in a vacuum. The Agency will provide rationale for its media proposals. In many CSM countries there are syndicated sources that Media Departments use to evaluate how proposed plans meet pre-determined objectives. In countries where such sources don't exist, the Agency must find other justifications for its media plans.

Media is more than just numbers. The media decisions you will make require that you appreciate quantitative considerations, but also have an ability to assess important qualitative implications. Trade-offs will have to be made, since budgets are not unlimited. You must understand the impact of such trade-offs, and encourage media planners to be imaginative in exploring alternatives to stretch your dollars.

The media process itself involves the following four phases:

PHASE I: ESTABLISHING OBJECTIVES

Here you must determine what the media objectives for the brand should be. It requires briefing the Agency on relevant information, and agreeing to an overall media objective as well as objectives for the target audience, the geography, media delivery, scheduling, creative considerations, etc. The role of entertainment and indigenous cultural media should also be discussed (see Section 3B). These objectives will be your blueprint for broadly evaluating media plans.

PHASE II: EVALUATING STRATEGIC OPTIONS

With these objectives in mind, you will need to agree on which media strategies are most appropriate. The Agency will investigate a number of different strategy options. These include broad media classes (e.g., TV versus radio versus print), as well as potential media vehicles within each class (e.g., types of programs or magazines). They will then come to you with recommended strategies. Importantly, they must provide detailed rationale for their recommendations, so you can approve them.

PHASE III: BUDGETING AND MEDIA FLOW

Once you've decided on the most appropriate strategies, the Agency must recommend a budget level (unless one has been pre-determined). They will also provide you with a recommendation(s) on how to schedule media (flow charts and delivery summaries) to best achieve in-going objectives. You will need to agree to a recommended media budget and schedule. Then the plan is implemented.

PHASE IV: POST-EVALUATION

Finally, various testing measurements must be put in place to help assess the value of your media plans for the future.

As with the creative process, the role of the CSM Manager is not to write the media plan. But to perform your functions throughout the process successfully, you must know something about how the media works.

PHASE I: Establishing Objectives

Briefing

The CSM Manager and the Agency (media and account personnel), should meet a couple of times to discuss and finalize objectives in several key areas. The nature of these objectives will be a direct outgrowth of marketing considerations. These objectives will form the backbone of the media plan, and function as a guideline in the same way that the copy strategy does for creative development.

At the first meeting, the Agency should be briefed on the following marketing data:

- **Your product.** In media terms, this means your sales distribution, sales trends, and the purchase/usage cycle. This will help the Agency determine where it needs to advertise, whether there are seasonal considerations, and what scheduling strategies should be considered (e.g., the need for continuity). Marketing objectives and strategies should be provided as part of this review.
- **Your competition.** How have you positioned your product? If you are targeting new contraceptive users, what other brands might they consider as they make their choice? Will you be switching users from a less effective to a more effective method? If there are other contraceptive brands or messages out there, the Agency needs to make sure you have a sufficient "share of voice" to be heard in the marketplace.

Additionally, you might make the Agency aware of any other parties who advertise contraception (e.g., the government), because there may be complementary media opportunities worth exploring (e.g., back-to-back scheduling of announcements).

- Your target audience. Who are your most important prospects? Unlike embellished creative target audience definitions, the media group primarily needs functional demographic descriptions (e.g., sex, age, SES) with behavioral/attitudinal perspective as appropriate. Demographics help determine broad media classes (TV, print, radio); behavioral/attitudinal perspective helps in the selection of media vehicles (e.g., which programs).

Precisely define the primary target, and identify any important secondary audiences. Your primary target in all likelihood is the end-consumer; secondary targets might include influentials or middlemen.

When you discuss your targets, be sure to focus the Agency on unique behavioral characteristics that might suggest the need or opportunity for unusual media tactics. If community theatre, story telling and puppet shows are favorite past times of these people, you might want to encourage the Agency to consider these media as adjuncts to a more typical media plan.

- Constraints and mandates. Possible constraints might include:
 - Budget
 - Creative product
 - Promotion plan
 - Advertising environment

One of the biggest constraints is usually the budget. In some cases, we may already know how much we can spend; in others we may need to ask for guidance from the media department on what needs to be spent to accomplish our objectives. If the Agency makes such a recommendation, they must justify it.

Another potential mandatory might be the creative product. Longer copy lengths and larger creative units cost more money. If you have decided that :60 commercials are important for educating the target audience, they will be expensive. Although :15's are cheaper, they are only "reminder" advertising and won't accomplish educational goals.

If you have an active trade and consumer promotion plan, that merits advertising behind specific events, tell the Agency. For example, if you are running a sweepstakes in November, you may want heavy advertising behind it.

Finally, since CSM messages are often controversial, you may want to specify in the strategy that the media planner avoid or seek certain types of advertising environments.

Objectives

After this meeting, the Agency should propose objectives in key media areas. These include:

1. Overall media objective
2. Target audience
3. Geographic considerations
4. Media weight or delivery
5. Scheduling
6. Creative considerations
7. Other

1. Overall media objective. This is a specific statement that translates the marketing objective and strategy into media terms. For example, if you are launching a new CSM brand, one of the media objectives might be 'to efficiently provide high introductory weight to achieve rapid awareness among the target.'

2. Target audience. This will be a restatement of the target audience information you provided during the initial briefing, focusing on demographics. If you have a secondary audience as well, the Agency should quantify how media weight will be split between the two. Remember, the target audience definition should be as specific as possible, to avoid media monies being wasted on unimportant groups.

A hypothetical CSM media target definition might be: married women, aged 18 - 35, from urban households with incomes less than \$X. These women have less than four years formal schooling and are moderately influenced by their husband's attitudes toward contraception. Husbands, thus, are a secondary target. Use a 70%/30% weight split in emphasis.

3. Geographic considerations. You only want to run advertising in your sales/distribution areas. If your sales area are broad-based and of equal importance, you may want broad-based advertising. Alternatively, you may want to concentrate in areas of high sales potential.

Geography can be broken out:

- Nationally
- Broad geographic regions
- Major metropolitan centers
- Rural areas
- Specific neighborhoods

Appropriate CSM advertising geography varies by brand and country. However, introductory advertising often runs in a wide geography, providing the distribution is there, to broadly establish the brand. Existing brands often put heavier weight into areas where the franchise is well-developed, to maximize volume potential.

4. Media weight or delivery. These are specific measurements of weight and/or delivery that show you how effective your media plan will be against the target population. It is important to remember that you cannot measure the effectiveness of a media plan by the number of times a commercial or print ad runs. What matters is how many of the people in your target audience actually see your message, and whether they see it enough for it to register.

"Gross rating points" (GRP's) are the most common measurement of media weight. A rating is the percent of the target audience in the total viewing area turned to a particular program. If two out of five homes are tuned in, the program has a 40% rating. Gross rating points are simply the sum of all ratings in your plan.

The terms "reach" and "frequency" are also often used when discussing how effective the delivery of a plan is. These will be explained in detail later. Here you should note that reach has to do with the percent of your target audience that receives your plan (reaching 90% of the target audience is better than reaching 20% of it). Frequency involves how often these people actually see a given message (e.g., once, twice, etc.).

In many countries there are market research companies who are paid to do this sort of analysis. Such surveys are expensive. But they can tell you, for example, how many people are watching particular programs, etc. so media weight and delivery can be calculated. While the ability to measure media effectiveness will vary by country, you should state some sort of objectives for effectiveness.

In countries where syndicated services do not exist for measuring media weight, the objective may be stated broadly: 'Advertising must reach a large portion of the population heavily and continuously.' However, the Agency should attempt to define 'heavily and continuously' (e.g., a minimum of three times every two weeks), perhaps based on their experience with other brands.

In more sophisticated countries, we can be more specific: 'The advertising must reach over 75% of the target audience an average of twice a week.'

Media weight goals will vary by the task at hand. We often see higher weight for introductions, which get scaled back as the brand moves into a sustaining mode.

5. Scheduling. This objective indicates what time of year and how continuously advertising should run to be effective. Begin by asking yourself if it is really essential for advertising to run all year long.

Scheduling decisions are usually guided by the times when sales are expected to be the highest. Such time periods might be defined broadly (e.g., winter, summer), by specific months (e.g., pre-vacations), or by specific days (e.g., weekends; during a sales promotion period).

These time periods are then further defined as continuous or not, based on previous experience. A balance must be struck between the amount of advertising run each week and the number of weeks the advertising runs. Generally, it is better to run at effective levels for a shorter period to maximize impact against the target audience.

6. Creative considerations. The media objectives must recognize the needs of creative. Thus, whatever decisions were made during the creative process about the need for sight, sound, motion, color, package-registration, message length, message complexity must be reflected here. For example, if you have a complex advertising message and the creative department is developing :60 TV copy, you do not want to end up with a media plan where 75% of the weight is in billboards. An objective for creative considerations helps avoid this.

Additionally, the Agency may include a statement here that leaves the door open for looking at innovative media opportunities that may require special creative (e.g., radio dramas, Section 3C).

7. Other. This is where any mandatories or constraints will be spelled out.

Once you have discussed and approved these objectives, the Agency will commence planning.

PHASE II: Evaluating Strategic Options

The Agency now begins to develop a media plan, by identifying and evaluating various strategies that might be used to achieve the on-going objectives. This is when decisions are made regarding which media classes to use (e.g., TV vs. radio) and which media vehicles to select within each class (e.g., one program versus another).

Media Classes

It is hard to generalize about the strengths and weaknesses of different types of media in the CSM world because country environments are so different. The composite list below represents a variety of media class considerations across the CSM world. Think about these guidelines based on their appropriateness for your own environment:

<u>Medium</u>	<u>Strengths</u>	<u>Weaknesses</u>
1. <u>Television</u>	<ul style="list-style-type: none">• high impact• audience selectivity• schedule as needed• rapid awareness• sponsorship availabilities	<ul style="list-style-type: none">• high cost (production and media)• uneven delivery by market• advance commitments often required• greater regulation• scheduling constraints• brand sell restrictions• some language restrictions• ethical product restrictions

Consideration:

Needs to be a well-established in-country medium to be an effective mass media vehicle for the CSM target consumers.

2. <u>Radio</u>	<ul style="list-style-type: none">• lower cost• audience selectivity• schedule and commercial length flexibility• personalities available• can tailor weight in spot markets (e.g., rural areas)• sponsorship availabilities• high attentiveness medium• can add credibility to message	<ul style="list-style-type: none">• can be high clutter, lack intrusiveness• smaller audiences• lacks impact of sight• high total cost for wide reach• brand sell restrictions• some language restrictions
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Consideration:

Credibility and impact vary considerably by CSM country. In many cases it's the primary broadcast medium.

3.**Magazines**

- audience selectivity
- editorial association
- merchandising
- long life (pass along readers)
- large audience per insertion
- excellent color reproduction
- good efficiencies
- merchandising
- literacy necessary
- long lead times for
- commitment
- readership accumulated
- uneven delivery by market
- cost premium for regional or demographic editions

Consideration:

Less appropriate for many CSM audiences due to literacy issues. Better as a tool for influentials. Variety of vehicles available -- trade and consumer publications; range of editorial environments can make it attractive for the right target. For example, photonovellas (adult, "soap-opera" comics with large circulations) have worked well in Latin America.

4.**Newspapers**

- large audience
- immediate reach
- short lead time
- market flexibility
- difficult to target specific audiences
- least efficient
- high out-of-pocket cost for national use
- minimum control of positioning
- clutter
- short life

Consideration:

Consider the editorial environment. Tabloids may be cheaper but is the environment appropriate for legitimizing many of our contraceptive brands?

5.

Outdoor
(billboards;
transit)

- high reach
- high frequency
- good efficiencies
- opportunity for localization
- immediate registration of brand
- scheduling flexibility
- no depth of sell
- high cost for national effort
- best positions not always available
- poor coverage in some areas
- long purchase cycle
- maintenance/quality control
- clutter

Consideration:

Some differences among various outdoor classes. Billboards go by the consumer more quickly than transit advertising. But transit is only as good (in many cases) as the ground transportation.

6.

Cinema

- distinctive medium
- low clutter
- good efficiencies
- more expensive production
- limited audience reach
- no frequency

Consideration:

This is an opportunistic tactic rather than a major media vehicle. It has been used in many countries where access to TV is not possible.

Evaluative Tools and Terms

Media decisions are not made arbitrarily. The Agency should be able to justify their recommendations based on the following general guidelines:

Cost per thousand (CPM)
Circulation
Audience composition
Editorial environment
Geography
Historical research

You must be familiar with these terms to evaluate rationales for particular strategies.

1. Cost per thousand (CPM)

This measurement indicates how much it costs to reach 1000 people in a particular media. It can thus be used to compare the cost of reaching 1000 people in television versus print versus radio, etc. CPM's can also be calculated for specific media vehicles. In that way you can compare what it costs to reach 1000 people with an ad in one magazine, for example, versus another.

While cost should not be the only consideration you use in agreeing to a strategy, it is certainly important. The Agency should give a comparative CPM ranking chart for its media classes and vehicles. This way you can make better informed decisions.

Let's see how easily a CPM is calculated:

$$\text{CPM} = \frac{\text{Cost}}{\text{Audience in 000's}}$$

Example:

If a radio commercial costs \$500 and reaches 250,000 homes, the CPM is \$2.00. Said another way, for every 1,000 people you reach, it costs \$2.00.

$$\frac{\$500}{250} = \$2$$

Anyone can do a CPM. You can easily get the media cost of one insertion or one commercial. That's one part of the equation. In print, circulation is readily available. This is your audience number, or the second part of the equation. For radio or television, in some countries you may need to make an educated guess of audience viewership. Look at the range of the signal. How many people live within that range? Often you can get estimates for the number of people who own televisions or radios in an area even if you don't know whether they are listening. The media reps who work with the Agencies should have some ideas here.

The point here is that some measurement of efficiency is better than no measurement of it. If you don't know the CPM how can you justify the expense of using one medium or vehicle versus another?

2. Circulation

This is the number of copies of an issue of a particular magazine or newspaper that is distributed.

Various publications should be able to give the media planner an idea of these numbers. By comparing these numbers to the population and looking at one magazine's circulation versus another's, you can see how broad or narrow a particular vehicle's coverage is.

3. Audience composition

The Agency should be able to determine who the audience is composed of (demographically and otherwise) for the various vehicles it recommends. For example, if two women's magazines are being considered, is one of them better suited to your target audience (one might have an older female audience and the other one a younger)? The same holds true for radio and television programs.

Most media representatives have this information available when they talk to Agencies.

4. Editorial environment

This is a subjective assessment, but an important one. You want to make sure that selected media classes and vehicles are correct for your audience editorially. If you look at a recommended program yourself or read the magazine you can make some judgments. For example, even if a tabloid has an efficient CPM, good circulation and the right audience composition, you may not want to advertise in it if its editorial environment doesn't support family planning.

5. Geography

Make sure that you are given the facts regarding the geography that a particular media class or vehicle covers. Is it national or regional? If regional, do the magazine's regions match your sales areas? You don't want to advertise anywhere that you don't have sales or distribution.

6. Historical research

Finally, don't forget to use previous tracking studies to help you determine the appropriateness of a given media class. In Indonesia, for example, tracking studies suggest that radio is the best medium. The original media mix for Dualima condoms had more print than radio, but the tracking study showed 80% of awareness came from radio. Similarly, we suspect that in Africa print is less useful for the end consumer (less than 30% penetration).

PHASE III: Budgeting and Media Flow

Now, with both objectives and initial strategies behind you, the Agency is in a position to finalize the budget (unless it was predetermined) and complete the media plan.

Completing the media plan will involve developing alternative ways to use and schedule the strategies you've agreed to. Schedules will be contained on "flow charts," pictorial representations of how media will flow throughout the year. There should also be supplemental charts that contain information like quarterly weight, reach and frequencies, quarterly spending, etc. By the completion of this Phase all the objectives set forth at the outset of media planning should be fulfilled.

Additional Evaluative Terms

To evaluate the media flow chart and supplemental tables for this Phase, you need to be familiar with some additional terms. Let's look closely at some of these:

1. Gross rating points (GRP's)

As mentioned earlier, GRP's are the most common measurement of media weight. They are critical to help you understand how effective your media plan is. GRP's can be given for the total plan, as well as for particular media areas. By looking at GRP's you will get a sense of how effective the plan is in general, particularly if the Agency has done more than one plan alternative to compare. You can also see how effective the plan will be in one part of the country versus another.

If you recall, a rating is the percent of the target audience (individual or homes) in the total viewing area tuned to a particular program. If two out of five homes are tuned to a program, it has a 40% rating. Gross rating points are the sum of all ratings in your plan. If you buy three, 40 rated spots, the plan delivers 120 GRP's.

Remember that the number of insertions or commercials that run in a plan do not tell you how effective the plan is. GRP's must be used because they take into account whether or not the audience is watching.

2. Reach and Frequency (R and F)

Gross rating points are related to two very important evaluative tools: reach and frequency. These two give us the best gauge of how the media plan will actually impact the target audience.

Reach is the portion (expressed as a percentage) of the target audience exposed to at least one of your messages over a defined period. If your media plan reaches four out of five homes, it has an 80 reach.

Frequency is the average number of times the target is exposed to your message over a defined time period. If six of your messages are seen in four homes, the frequency is 1.5.

Reach and frequency are interrelated, and both have a relationship to GRP's. These relationships are best expressed in an example:

- One radio commercial delivers 200,000 listeners:

$$\frac{200,000 \text{ Listeners}}{1,000,000 \text{ Population}} = \frac{20}{100} = 20\% = 20 \text{ GROSS RATING POINTS}$$

- A schedule of 10 such radio commercials will deliver 2,000,000 listener exposures:

$$10 \times 200,000 = 2,000,000$$

- This schedule will, then, deliver 200 gross rating points.

$$\frac{2,000,000 \text{ Listener Exposures}}{1,000,000 \text{ Population}} = \frac{200}{100} = 200\% = 200 \text{ GROSS RATING POINTS}$$

- While the schedule delivers 2,000,000 listeners, not all of these will be different individuals. Many members of the population will be exposed to the radio schedule several times. Thus, the schedule may only reach 500,000 different individuals at least once -- this, then would be the reach of the schedule.

$$\frac{500,000 \text{ Reached}}{1,000,000 \text{ Population}} = 50\% \text{ Reached}$$

- The average number of times those reached are exposed to the advertising is:

$$\frac{2,000,000 \text{ Listener Exposure}}{500,000 \text{ Reached}} = \frac{4}{1} = 4$$

Four (4) is the frequency of the schedule.

- Reach and Frequency can be expressed as an equation:

Reach	X	Frequency	=	Gross Rating Points
50	X	4.0	=	200
500,000	X	4.0	=	2,000,000
Reached		Average Times Exposed		Listener Exposures

- If it were determined that the radio schedule of 200 gross rating points actually reached 75 percent of the target audience, then the equation would be adjusted as follows:

Reach	X	Frequency	=	Gross Rating Points
75	X	2.6	=	200

Most people will never actually need to calculate reach and frequency. That is the job of the media planner. And Agencies in some countries may not have sufficient data available to do these calculations. In countries with such capabilities, make sure you are given both quarterly and annual reach, frequency and GRP's for each plan under consideration.

Regardless of your country's capabilities, there are a few important concepts about reach and frequency that hold true:

- Reach and frequency are related. As reach goes up, frequency goes down and vice versa. Therefore you must decide when you set delivery objectives, what general levels of reach and frequency are acceptable. These decisions are tied to marketing goals. For example, high reach leads to broadscale awareness. This is important in CSM introductions. But if you have a complicated message directed to a narrower target audience, frequency may be more important than reach.
- Different combinations of media will deliver different ratios of reach and frequency.
- The more different media used, the higher the reach.
- Concentration in fewer or even one medium will tend to emphasize frequency.
- The accumulation of reach and frequency for any media schedule follows a similar pattern -- initial exposures build reach, but the rate at which reach is accumulated declines over time while frequency increases.
- Print and some television schedules tend to emphasize reach; radio tends to emphasize frequency.

3. Geographic Delivery

The media planner will examine various combinations of national and local media, to find a mix of scheduling that provides effective national coverage along with additional coverage in areas of good sales potential.

A plan that uses only national media, delivers the same amount of advertising to a good business area as it does to a bad one. It may make sense to supplement this effort in good areas, since you don't want to "underdeliver" them relative to their sales. On the other hand, you want to minimize "overdelivery" to bad areas. The media planner goes through a repetitive process to strike the best balance between the two. A couple of points to keep in mind as you look at their decisions:

- The national level must still be effective, while the local level is increased enough to make a difference.
- If your brand is very regional, it may not make sense to have national spending.
- If national media are unavailable, the planner may divide the budget into regional budgets based on a general determination of local sales potential.

4. Scheduling Patterns

The media planner must also decide how to schedule media across the year. This is indicated on the "flow chart" the Agency provides, which shows media activity for each week of the year. The scheduling depends on the advertising task. Let's look at the options involved here:

- Continuity - Scheduling media during most or all weeks of the year.
(52 Weeks)
Media 20 Commercials per Week = 1,040 (52 Weeks)
- Flighting - Scheduling media only at certain times of the year.
(10 Weeks) (10 Weeks) (6 Weeks)
Media 40 Comm'l/Wk 40/Wk 40/Wk = 1,040 (25 Weeks)
- Blinking - Scheduling media every other week.
1 Wk 1 Wk 1 Wk 1 Wk 1 Wk (26 Weeks)
Media 40 40 40 40 40 etc = 1,040
- Pulsing - Scheduling varying amounts of media per week.
(13 Weeks) (26 Weeks) (39 Weeks)
Media 40 per Week 20 per Week = 1,040

As general principles, here are some helpful guidelines to remember regarding scheduling:

- Introductory efforts generally require some higher level of media weight during the initial phase of advertising.
- While, ideally, continuity of advertising is desired, the amount of weight scheduled when advertising is running should be sufficient for impact. It is better to speak with a strong voice for 26 weeks than to whisper for 52 weeks.
- Even after an introduction is completed, reintroductions may sometimes be required, particularly if new creative is available.
- Effective scheduling patterns may vary by area of the country depending on the sales potential of each area.

5. Message lengths

Finally, advertisers often run commercials of varying lengths and print of different sizes. Typically, introductions use longer lengths. The media plan will be affected by the amount of longer versus shorter copy length it contains. As a rule of thumb, you may want to lead with longer length commercials, later punctuated with shorter ones to reinforce the point. Longer lengths and larger pages are more expensive, so you will end up with fewer announcements in a media plan with a heavy focus on longer copy. But there may be reasons to do this (recall creative considerations).

6. Cost per thousand (CPM's)

These were defined earlier. However, if the Agency presents more than one plan or flow chart, they should provide comparative CPM's for each plan so you can see which one is more efficient.

Media Plan Components

Now that you are familiar with the evaluative terms, let's recap what the ideal media plan should include:

- A statement of objectives. For example, an African country set three objectives for a two-year campaign of its condom product: to create brand awareness; to change married male attitudes of condom usage from negative to positive; and to motivate purchase.

- **Recommended strategies, with rationale.**
 These are the media classes (e.g., TV, print) the Agency is recommending, and the vehicles (e.g., types of programs) within each class. The decision of what to use and what not to use must be justified. This justification should include:
 - A comparative CPM chart so you can see which classes and vehicles are most efficient.
 - Circulation so you know how large/popular the vehicle is.
 - Audience composition figures so you can make sure the vehicle is the best match for your target audience.
 - Geographic coverage so you know that the vehicles match CSM sales and distribution areas.
 - Analysis of the editorial environment to make sure the vehicle is appropriate for CSM audiences.
 - Reference to previous tracking studies that attest to the effectiveness of various media classes.
- **A flow chart with supplemental support data.** The flow chart is a pictorial representation of how media weight and spending will flow throughout the year, by media type and geography. Supplemental support charts should include:
 - Bottom line CPM's for the recommended plan and, any alternative plans.
 - A breakout of geographic spending and/or delivery (GRP's, R/F).
 - Reach and frequency by time of year/phase of plan (quarterly), and annually for the total plan.
 - Scheduling patterns.
 - Spending by medium.
 - Spending by time of year/phase of plan.
 - Delivery among the primary and secondary target audiences (GRP's, R/F).

- Analyses of spending and delivery by commercial length and size of print.
- Closing dates and dates for media commitments.

The media department should take into consideration key promotion events by comparable time periods as well. It is very important to look at how your media and trade and consumer promotion complement each other. For example, does it make sense to run a major consumer promotion if you have been out of advertising for three months? Probably not. Remember, integrated marketing communications means synergy -- you want to have high awareness and interest in your brand via advertising to optimize audience receptivity to your promotion.

- Innovative media opportunities. Entertainment and the use of indigenous cultural media can be very effective in CSM programs. This is particularly true in rural areas, where traditional mass media may not be available or effective. It is also good for hard to persuade targets like teens. This area will be dealt with in more detail shortly.

In addition to a traditional plan, the Agency should suggest a couple of innovative opportunities. For example, they might consider sponsorships, placing CSM products in movies, developing program (e.g., radio dramas in Jamaica).

Such opportunities should be looked at separately from the base media plan because their contribution is harder to measure. But evaluating the expected audience's composition, and after the fact surveys, can help you assess these opportunities later (see Special Events, Section 3).

Budgeting

As media strategies and flow charts are developed, the budgeting process occurs.

Here are a few things to keep in mind as advertising budgets are determined:

- Deciding how much to spend on advertising is strategic; it relates directly to the marketing and advertising task. The larger the task, the more it will cost to accomplish.
- Advertising spending can only accomplish so much; the other elements of the marketing mix (e.g., pricing, packaging), play major roles in the marketing process.

- Advertising spending works in concert with other elements of the marketing plan. For example, it is wasteful to spend on advertising before the product is fully distributed. Procter & Gamble, for instance, won't advertise any product until it has close to 90% distribution.
- It generally costs more to introduce a new product than to sustain an established product. Advertising clutter, competitive brand recognition and consumers' lack of knowledge and apathy must all be overcome.
- Spending too little on advertising is as wasteful as spending too much. Brands that otherwise might be successful and profitable, can fail from lack of advertising support.
- It takes time for advertising to produce results; a minimum of six months is required for a reasonable advertising effort to succeed.

There are no magic formulae to guide the CSM Manager in knowing, with certainty, what is an acceptable budget level. He will have to look at the role of advertising in the context of his entire marketing plan -- including the other integrated communications tools, and all elements of the marketing mix. The most common way we approach media budgeting in the CSM world is by using the task method.

Task Method

With the Task Method, the advertiser tries to define, as specifically as possible, all tasks the advertising must accomplish.

These definitions may include:

Target Audience
 Delivery Goals
 Geographic Area
 Commercial Length and Insertion Size
 Number of Weeks of Advertising
 Media Classes and Vehicles

Having established objectives and strategies for these considerations, the money it takes to meet them can be calculated.

This sum may be more or less than the advertiser has available. In this case, one or more of the objectives must be adjusted to provide an advertising plan that fits available resources.

Here are some general cost perspectives for the Task Method:

	<u>Higher Costs</u>	<u>Lower Costs</u>
Target Audience	Broader	More Defined
Geography	Wider Area	Smaller Area
Commercial Length	Longer	Shorter
Reach	Higher	Lower
Frequency	Heavier	Lighter
Time-In Advertising	More Weeks	Fewer Weeks

To provide upfront guidance , an advertiser should define a higher or lower priority for each of these considerations when objectives are established at the outset of media planning.

Test of Reasonableness

It is difficult to know if you've got the right spending level. However, the Agency should provide a range of budgets for the products they advertise. How much does the top advertiser spend? If the top spender is Coke and the CSM media cost exceeds Coke's you may be overspending. What does a typical medium-sized advertiser (e.g., a bank) spend? How much does the lowest advertiser spend?

The objective here is to get a feel for the levels of advertising spending that are appropriate in a given country. You need some sort of a benchmark for where you fit in the country in which you are advertising, despite the media strategies the Agency is recommending.

Media Plan Guidelines

In summary, here are a few guidelines to evaluate media planning:

1. Has the plan been prepared professionally?
 - Have all reasonable options been examined?
 - Documentation supporting any options selected?
 - Plan delivery compared to media objectives?
2. Does the plan deliver on the most important goals set forth in the media objectives?
3. Does the plan stress effectiveness as opposed to merely being efficient?
4. Does the plan accomplish a few things well as opposed to many things in a mediocre fashion?

5. Do the media selected reach the target audience?
6. If an introductory phase is called for, is the weight scheduled sufficient to break through to the consumer?
7. Have extra media been scheduled during particularly strong sales periods during the year?
8. Has extra weight been scheduled in geographic areas of high sales potential? Are you advertising anywhere you don't have sales or distribution?
9. Does the plan make primary use of the most effective creative executions?
10. Have creative solutions or special opportunities been fully explored? (See Special Events, Section 3.)

While there may be several media plan options, it is not uncommon to combine elements from various plans to construct the most effective scenario.

PHASE IV: Post-evaluation

As the media planning process unfolds and plans are approved, you need to consider how you will test the value of these efforts.

An on-going tracking study that measures changes in consumer awareness and attitudes towards your brands is one important tool that helps you know the value of your efforts. Such studies can also measure your communication of strategic advertising ideas. These studies are discussed, in detail, in the Market Research module. If you see no changes in consumer awareness after a year of advertising you may want to look again at your media plan. Perhaps your weight is insufficient. Perhaps the media mix is wrong. Or perhaps there are factors outside of media that are having an effect, such as a new competitor or ineffective copy.

One way to help understand how media is working in the environment, and how much to spend, is to do a heavy spending test. In this case you would take a smaller geographic area, that is representative of your national environment, and run a media plan at a higher weight level. Awareness and sales data are two important factors to track in this respect. If the media test area tracks significantly better than the national geography, you may not be spending correctly overall.

Section #3

"SPECIAL EVENTS"

Entertainment and Indigenous Cultural Media

SPECIAL EVENTS

A. DEFINITION AND CONTEXT

Up until now we have been talking about forms of advertising that involve modern technology and are quantifiable to one degree or another. While such methods are important, they are not the only way to communicate with CSM audiences.

Special advertising events that take advantage of local entertainment and educational forums let us put indigenous cultural media to work for us. Such events can be powerful tools to motivate CSM audiences, either as adjuncts to mass media plans or in lieu of mass media when communications networks are unavailable.

For example, in rural areas where mass media is undeveloped, special events may be the single best way (if not the only way) to communicate the CSM message. Such events can also be effective for hard to reach target audiences (e.g., teens). Since entertainment is often involved in special events, audiences enjoy the message while they are hearing it. This increases their receptivity to it.

B. CAPABILITIES

Special events have been used in a variety of CSM and other USAID funded programs. In particular, Johns Hopkins Population Communication Services (PCS) has pioneered some of the most far-reaching work in the "enter-educate" field. Private sector companies also take advantage of such opportunities (e.g., Colgate Palmolive in Papua New Guinea). Let's spend some time reviewing special events' strengths and weaknesses, looking at how it's used and talking about what the CSM manager should consider in exploring such opportunities.

Strengths

- highly targeted
- good for hard to reach audiences
- depth of sale
- high credibility
- distinctive
- reach and frequency capabilities
- integrates with IMC tools
- legitimizes/opens dialogue

Weaknesses

- harder to quantify
- varied efficiencies
- harder to control
- potential audience
- polarization
- variable production costs

Strengths

- Highly targeted.
The variety of forums available provide targeting opportunities -- music videos to teens; soap operas to housewives; community theatre to rural Africans; puppet shows to Indonesians.
- Good for hard to reach audiences.
Using roving theatre troupes, mobile film units and popular songs, allow CSM messages to get out into the field and reach audiences we otherwise couldn't.
- Depth of sale.
We might dramatize, for example, the problems of overcrowded families or the interpersonal difficulties couples often experience when deciding to practice family planning (e.g., husband against it). In this respect, the audience may feel less isolated. This may strengthen their resolve to change behaviors.

The entertainment medium may work more convincingly when it focuses on broad concepts rather than extolling the virtues of a particular product. But the product can be promoted in other ways around it (see other IMC opportunities below).

- High credibility.
Along the same lines, use of celebrities or entertainment professionals in these types of forums makes the sell a little "softer," thereby potentially enhancing its credibility. Such spokespeople are often people audiences aspire to be like.
- Distinctive.
Because entertainment is such an unusual forum for advertising CSM products and concepts it will stand out in audiences' minds.
- Reach and frequency.
The particular reach of the vehicle you are using depends on its nature -- music videos, radio dramas and films can have a high reach among the target provided they are appropriately directed. Frequency can also be achieved through the repetition, for example, of a popular song.

- Other IMC opportunities.
Although the dialogue in a show or song may not explicitly use brand names, entertainment forums can provide other opportunities for brand promotion. Festivals may have places you can put booths to answer questions, sample and provide informational brochures. You can include hotline numbers at the end of radio dramas or music videos to call for information and samples. You can sponsor contests, sell t-shirts etc. that involve your brand names as well as the popular song or drama.
- Legitimizes/opens dialogue.
Because entertainment is so popular it will open a dialogue on the subject of contraception. By talking openly about a previously taboo subject, it helps to legitimize it.

Weaknesses

- Harder to quantify.
You may, judgmentally, have an idea of the reach and frequency of your entertainment forum by its nature (record vs. concert) and the expected composition of the audience. But there will not be syndicated sources that can document its effectiveness in advance in the same way traditional media is quantified (GRP's, R/F).

Carefully consider your objectives going in -- if this is a rural audience you can't reach otherwise it makes sense regardless. You may be able to project the impact of a radio drama where you know the radio station's audience, better than you can a roving theatre troupe's program. Minimally, plan to conduct a baseline survey with the audience in advance of the event and a survey afterwards to provide some perspective on which to base future decisions.
- Varied efficiencies.
In this vein, the efficiencies of these forums will vary. Music videos and popular songs will cost more to produce and promote but will reach wide audiences. Roving theatre troupes are more selective in the audiences they reach and may be cheaper, but their reach will be smaller. And so forth.

- Harder to control.
Some entertainment forums are easier to control than others. You may be able to approve the script of a radio drama and the lyrics to a song much as you can approve the storyboard for a radio commercial. In other cases, you will just be able to provide objectives or key copy points for a group of players to include in their drama. When you can, try to follow up on what's been done (e.g., ask for a videotape of a community theatre presentation).
- Some audience polarization.
Because of the high profile entertainment has and the open way that it deals with family planning issues, it may polarize some audiences and create controversy. You need to consider your own environment.

In a very conservative country and where the CSM program is new, it might be harmful to use entertainment right away. Elsewhere, you need to weigh the positives against the negatives because you know that there will probably always be some people who find the subject offensive.
- Variable production costs.
There will be a range of production costs depending on the entertainment forum you choose. Celebrities can have high fees. Music videos require good production values. Festivals and/or theatre troupes may involve relatively low out-of-pocket costs. Think about entertainment in the context of your budget.

C. TYPES OF ENTERTAINMENT

Let's look at some of what's been done, or what might be done, using entertainment.

- Popular songs, music videos and concerts.
Existing celebrities or up-and-coming celebrities can write and sing CSM songs, give CSM sponsored concerts and/or make music videos to promote contraceptive messages. The PCS Johns Hopkins group has been behind a number of these success stories.

Tatianna and Johnny are a famous teen duo who have been used successfully to tell teens to delay sexual activity (in 11 Spanish speaking countries.) Their songs, Cuando Estemos Juntos (When We're Together) and Detente (Wait), became two of the most popular in Mexico in 1986.

The PCS-sponsored program involved the merchandising of these songs and their messages on records, in music videos, on television and radio commercials and in posters. An aggressive publicity effort surrounded the program. Research conducted afterwards showed that the messages of the songs were correctly interpreted, and that attitudes about delaying the onset of sexual activity may have been strengthened, especially among young Mexican women.

In the Philippines, Lea Salogna's song, "I Still Believe," had a similar message. She became a star overnight, and the program was broadened to include essay writing contests on the subject, art shows and the establishment of a hotline. A new soap opera was formed based on this theme.

Two famous singers, Onyeka Owenu and King Sunny Ade in Nigeria, recently created two hit songs and music videos encouraging family responsibility. "Wait for Me" is directed at youth where as "Choices" encourages married couples to plan their families. Publicity has been extensive -- and while introductory publicity leverages the popularity of the songs, sustaining publicity will tie the artists and songs to specific family planning services.

It is important to note that in all cases, the celebrities' popularity and appropriateness was carefully researched among the targets. Highly professional marketing and production companies were also involved in the development and implementation of these programs. In the CSM world, the important thing is to tie these efforts into the promotion of specific CSM methods and brands (e.g., using the celebrity as an endorser).

- Community theatre.
A CSM program in Uganda is planning to use a theatre troupe to reach Ugandans with contraceptive messages. The troupe will be briefed on family planning issues, develop appropriate scenarios and/or songs which will be presented in various communities.

In Papua New Guinea, Colgate Palmolive used a theatre group to put on a play about how to brush teeth, and why it's important to do so. Folk theatre has also been used in Nigeria by PCS to promote family planning. It is important for CSM managers to tie these efforts to the promotion of our products (e.g., pass out condom samples).

- Radio dramas.
Radio has been used effectively to convey contraceptive messages. The Jamaica CSM program used both a question and answer radio format to communicate information, and a dramatic format focusing on family planning issues. Such shows can be sponsored, if not produced, by local CSM programs which helps promote our products.
- Folk talent teams.
Folk talent teams have been used, for example, in Bangladesh communities to get the contraceptive message across in songs.
- Festivals.
Festivals provide opportunities for songs, dances, poetry readings, etc. on the subject of contraception. These work particularly synergistically if booths containing information and samples of various CSM products are also present.
- Walkabouts.
This is an indigenous cultural medium in Papua New Guinea where dramatic players could "walkabout" extolling the benefits of contraception.
- Mobile film units.
In Bangladesh, mobile film units have been sent out into the country to educate locals on contraception.
- Video vans.
In many CSM countries, especially Africa, it is possible to include commercials in entertainment vans that travel to rural environments.
- Television shows.
A variety of types of television shows can be used to promote contraceptive messages. These can be CSM sponsored and/or produced. In Mexico and Kenya, family planning episodes have been seen on weekly shows. Soap operas in India, Mexico and Kenya have also dealt with the subject. Such shows can be serious, or even comedic (e.g., Nigeria) and still be effective.

In one instance (Sri Lanka), a CSM TV show is being explored as a way to communicate contraceptive information. It will involve a game show format where newlyweds will be used to creatively convey contraceptive messages.

- Shorts and feature films.
Short films and even feature films can be made involving issues surrounding contraception. Obviously a feature film would be far from the budget or capabilities of a typical CSM program. But if such films are to be produced by professionals, you may want to pursue opportunities to feature CSM products in the film, or perhaps run CSM ads in the theatre.

D. CSM MANAGER CONSIDERATIONS

The opportunities to use entertainment successfully are as varied as the cultures of the countries we work in. This does not mean you should insist that your plan include entertainment at the expense of mass media. Each CSM environment is different, and decisions on mass media and entertainment must be made in the appropriate context. If entertainment is to be pursued, remember that you will need to establish several things:

- Target audience.
Confirm the target audience you need to reach if different from the one for your base media plan.
- Objectives and geography.
Establish objectives for the entertainment program including the role it must play and the geography it must cover.

Think through the kind of information that will need to be conveyed -- a theatre troupe might be better able, for example, to give one-on-one instruction on how to use condoms. A question and answer radio show will help provide correct information on contraceptive products. A music video will popularize the key benefits of family planning. And so forth. The Agency must understand what your objectives are.

- Entertainment alternatives and justification.
Review appropriate entertainment forums and recommend the best one. This should provide perspective on production costs and some type of assessment of its delivery against the target group.
- Creative briefing.
Once you've agreed to the appropriate forum, the CSM manager should meet with the Agency Account and Creative people to agree on the copy points. The Agency should then contact and brief the appropriate entertainment source.

- **Evaluation.**
Try to monitor the performance of your entertainment vehicles.
For example: survey audiences after the fact; see how popular sampling has been; see if the information booth was used; look at videotapes of the performances, etc.

Section #4
"PUBLIC RELATIONS"

PUBLIC RELATIONS

A. DEFINITION AND CONTEXT

Public relations can be defined as "planned, non-sponsored, persuasive communications to stimulate demand and favorably influence attitudes and opinions about a product or service. Usually not paid for by the company." The focus here should be on the phrase "influence attitudes and opinions." In public relations, information is used to influence public opinion. Often this is done so subtly that the target audience is not even aware that a planned process is behind much of what is seen in the news or the mobilization of advocates to a particular cause.

Advertising and public relations in the CSM world share certain things in common. Both have the ultimate goal of creating behavior change. And both require a strategic planning process to be most effective. Creative development is also involved in many of public relations' end products, just as it is in advertising.

But public relations differs from advertising in that "persuasion" rather than paid access is used to get into the media. "In advertising, you pay for it. In public relations we pray for it," is a familiar sentiment among many public relations professionals. And public relations uses more diverse media techniques to communicate its information. These might include press releases, advertorials, sponsored events and contests, news coverage of an event or topic, symposia, brochures, public service announcements (PSA's) and the like. These techniques can be used in many different ways to accomplish different types of public relations objectives.

B. CAPABILITIES

Public relations can make or break CSM programs. In every country there are influential constituencies capable of directly helping or hindering our programs. Groups hostile to a CSM program may effectively block product distribution. They may deny the program access to mass media. Or they may seek to undermine program credibility. On the other hand, constituencies supportive of CSM activities may become actively involved in program expansion. They may serve as intermediaries, carrying the program's message deep into target populations. Or they may be influential in shaping positive family planning policies.

Let's look at the spectrum of what public relations can contribute to the IMC mix:

- **Creates a more receptive message environment**
- **Enhances message credibility**
- **Communicates in-depth**
- **Manages crisis situations**
- **Influences complex behaviors**
- **Affordably accesses special audiences**
- **Provides quick implementation/turnaround**
- **Leverages public/private sector partnerships**
- **Extends advertising ideas**

1. Creates a more receptive advertising environment.

Generating positive publicity and engaging the support of key publics are two ways public relations helps create a receptive message environment for CSM programs.

There are many forums that can be used to generate positive publicity -- from masterminding feature stories and editorials, to crafting news releases, to sponsoring symposia and training sessions. Such activity makes CSM audiences more receptive during launches, and sustains the positive momentum in established programs during times of change.

Public relations also provides us with tools to engage the support of key publics on our behalf. Gatekeepers, opinion leaders, and influentials including population/family health organizations, can be instrumental in advancing CSM program goals. We must identify and court relevant constituencies, uncover areas of mutual concern, and explore partnerships. Such people can work "formally" on our behalf, for example, as members of CSM Advisory Councils. And they can help us informally through exerting positive political, business and media influence.

2. Enhances message credibility.

The quality and diversity of public relations tools, and the fact that access to such tools is usually not paid for, legitimizes CSM public relations messages in ways that advertising cannot. Items that appear in the news, speeches by respected advocates (e.g., media personalities, village leaders, members of the medical and religious communities), and endorsements, bring added credibility to the CSM story. We can also form special interest groups to hold events that provide platforms for speakers and opportunities to sample products and distribute information (e.g., Mothers for Family Planning).

3. Communicates in-depth.

Many public relations techniques also allow us to create depth of sale. These might include:

- Advertorials, advice columns or radio talk shows that can provide in-depth contraceptive information and answer questions.
- Conferences and training programs that build skills and answer questions.
- VCR tapes, audiocassette programming and brochures that can explain or demonstrate in ways that would be difficult to in mass media.
- Direct response techniques, where p-o-p materials or print ads contain P.O. box numbers to write for additional information. For example, telephone "hot lines" for AIDS information have been established successfully in this regard.

4. Manages Crisis Situations.

Although the objective of public relations is to prevent crises, when they do occur, they can be managed through tactics like head-to-head negotiating, building coalitions with other groups at odds with the hostile group, or finding alternative ways to shift the program strategy and still meet objectives. Public relations contingency plans for crisis management have become standard operating procedures for many corporations. This will be discussed in the CSM context later.

5. Influences Complex Behaviors.

Public relations helps create social sanctions for contraception and provides vehicles for detailed information on methods and brands. It thus encourages the fundamental behavior change that practicing contraception, or using particular methods, requires.

6. Affordably Accesses Special Audiences.

Often, there are several important secondary audiences that a CSM program wants to reach with their message. However, such groups can be small or difficult to reach so mass media expenses cannot be justified. The diversity and specialization of public relations tools (e.g., newsletters), can be helpful and more affordable in accomplishing CSM objectives.

7. Provides Quick Implementation/Turnaround.

Public relations can also be used as a quick means to address specific issues. For example, a "letter to the editor" of a newspaper or a press release can be drafted very quickly to address specific problems or opportunities.

8. Leverages Public/Private Sector Partnerships

There may be many local private sector companies who would find it beneficial, from a public image perspective, to be associated with CSM projects. That's because CSM projects involve marketing within a "greater public good mandate." This can be very attractive to the right private sector partner. Joint public relations special events can be conceived, developed and publicized. Such partnerships can help defray costs to the CSM project.

9. Extends Advertising Ideas.

This avenue is distinct from the preceding, because it involves using public relations specifically as a way to extend and reinforce an advertising campaign.

Managing a program's relations with its varied publics, building coalitions and generating wider support for its activities are the central tasks of CSM public relations. To this end, some of public relations' biggest strengths for CSM programs are: its high credibility and legitimacy, its ability to be highly persuasive in an indirect way, and its potential for dramatization. As with anything, public relations has its weaknesses, too. These include no guaranteed placement or coverage, a lack of copy control over publicity generated and relatively poor frequency (a "story" is only "hot" once). It can also be difficult to measure public relations results. But if we understand the important role that public relations can play for us while recognizing its limitations, we will be in the best position to take advantage of it as an IMC tool.

C. RESPONSIBILITIES

The CSM Manager has a multi-faceted role to play in public relations. He may be the spokesperson for the project among opinion leaders and other constituencies, the contact person with the press, and the leader of the public relations planning process.

As the spokesperson for the CSM project, the CSM Manager must engage constituencies to generate and maintain program support. This requires an astuteness in identifying key players, an ability to be honest and forthright in providing information and an ability to "sell" diplomatically. He must quickly establish his credibility, and consistently maintain productive working relationships with relevant parties.

Part of this constituency building involves promoting good media relations. Success in dealing with the media depends on your ability to offer them something in exchange for the publicity they provide. They are in the information business. You are a source. CSM material, packaged attractively, can gain their interest (see Strategies under Phase II in the next section).

You must also be ready to respond to any requests for information from the press. You may want to designate an experienced CSM staff person to be the media relations specialist and handle all media calls, if not handle them yourself. In this regard it is important to:

- Determine whether the media request is within your area of expertise,
- Determine exactly what information is needed and when,
- Fill all requests promptly, accurately and completely,
- Avoid off-the-cuff remarks or snap judgments, and
- Provide only information you wish broadcast or printed.

Beyond these functions is the whole public relations planning process. In precious few cases does good public relations just "happen." It requires the same level of planning that developing marketing strategies and advertising require. Depending on your country's infrastructure, it may require substantial hands-on involvement by the CSM Manager.

In CSM countries with available public relations experts and Agencies, the CSM Manager's planning and implementing role can be much as it was in working with Advertising Agencies. The manager must provide relevant information on your marketing goals and business environment and important target audiences. You must agree to objectives, approve strategies and plans for public relations programs and approve creative work. There is a partnership that must be developed and nurtured between the manager and the Agency or consultant.

But there are more CSM countries where we are not fortunate enough to have public relations Agencies or specialists at our disposal. In these cases, the CSM Manager must become the expert. He will need to play a more active role in creating, developing and implementing plans. This requires sound strategic thinking and an in-depth understanding of how public relations works. He will need to designate a media relations specialist dedicated to facilitating public relations implementation, and providing public relations ideas. He will also need an Advertising Agency or free lance creative people to do specific creative projects.

In spite of the work and potential difficulties involved, it is vitally important for all CSM programs to have formal public relations plans in effect. This does not mean that there won't be years when you might only have a couple of public relations strategies you'll want to implement, because most of your budget needs to be spent on the other IMC tools. You may also want a low profile strategy at times -- sometimes keeping things out of the news is as important as getting things in.

But without a formal plan in force we set ourselves up for a lot of scrambling when a crucial need occurs. And crucial needs occur. In Brazil, when contraceptive advertising via the stork campaign was first conceived, there was no public relations component in the plan. We unexpectedly (and fortunately) discovered that there were some significant critics who felt that contraceptive advertising would be inappropriate. These concerns were capably addressed through fast public relations efforts where, for example, research results were leveraged to support our position. Later, media kits were sent to the press to formally acquaint them with the research and goals behind the CSM campaign, to keep it from being sensationalized. These efforts were successful.

But we are not always so lucky. In Trinidad, the "Informal" networking that was supposed to be taking place with key influentials was apparently ineffective. The Board of Television refused to permit our advertising to air until it was made totally generic. We'll never know if more formal efforts might have avoided this reaction. For example, an educational symposium where research results were leveraged proactively might have been helpful.

Separately, in Ghana, we also learned a hard lesson when the CSM radio advertising was pulled off the air because a very influential person connected with the government objected to it. If our Advisory Council had included someone like the Ministry of Information, perhaps this situation might have been avoided.

On the flip side, the successful Morocco Protex launch was well-planned and executed. Research results were drawn on in initial discussions with the Minister of Health to engage his support for the program. The CSM group, working with a public relations consultant, preceeded branded radio advertising with a series of media efforts. Radio talk shows were developed to generate discussion about family planning, male responsibility, and the role of the private sector in family planning. Opinion leaders from all major groups participated (medical, academic, religious, governmental). Numerous press articles were generated. Conferences were organized to train and inform pharmacists about these issues and Protex. A well-organized press conference kicked off the launch and received major media coverage. The "male responsibility" advertising theme was used whenever possible to create an integrated approach. Sales are currently three times as great as forecasted, and the environment has been very receptive to the CSM program despite the conservatism of the culture.

The lesson learned from Morocco and other such efforts, is that it pays to plan. We face enough risks in the CSM world as it is. Why multiply these by restricting public relations to informal channels or reacting to crises rather than proactively preventing them?

D. PUBLIC RELATIONS PROCESS

Because of the hands-on nature of public relations planning and implementation in many CSM countries, we will discuss public relations as though the CSM Manager had to develop plans himself with the appropriate support staff. For those of you who use public relations agencies or consultants, this will provide a closer look at what is involved in planning so that you can better evaluate public relations proposals.

There are three public relations phases:

PHASE I: PRE-PLANNING REVIEW

Here you should review existing information on the "environment" in which you will be implementing public relations plans. This review takes into account all marketing information on your brand, as well as external factors relating to the business environment. The goal is to think through and analyze this information in the context of public relations implications. What are the problems, opportunities and anticipated issues that public relations can address?

PHASE II: OBJECTIVES, STRATEGIES AND IMPLEMENTATION

Based on this review, you are in a position to establish public relations objectives, define and prioritize various target audiences, and develop plans and strategies to achieve your goals. If the CSM project also functions as a public relations agency, you must think through how to implement plans.

Alternatively, if you are in a country where Public Relations Agencies or consultants are available, they will develop public relations plans for your review once objectives and target audiences are established. They will subsequently handle implementation.

PHASE III: EVALUATION

As applicable, formative evaluation (pre-testing) and process evaluation (post-implementation analysis) should be conducted. Performance should also be tracked to determine future viability.

PHASE I: Pre-planning Review

Defining appropriate public relations objectives, audiences and plans, requires an astute understanding of the "external environment" in which you are operating. This involves an examination of environmental factors that are directly related to your program, as well as broader influences. Direct factors include a review of primary data such as sales patterns, usage information, competitive marketing efforts, etc. Broader influences include an examination of economic, geographic, social and cultural realities to establish trends. This is not new information -- you studied it when you developed marketing plans. The key is to rethink things in the context of public relations.

Take a second look, for example, at the five pre-planning exercises you went through at the outset of IMC planning:

1. Nature of the product
2. Target audience profile
3. Lifecycles
4. Selling chain
5. Selling environment.

If the single biggest influence in shaping consumers' attitudes is community organizations, what are they and how can public relations help? If pharmacists are critical in getting the product to the consumer, don't leave them out of your efforts. What are your public relations problems and opportunities based on the product/program and consumer lifecycles? If you are in an introductory mode your challenges will be different from those in a sustaining mode. How ready are consumers to hear about contraception via mass media? How does the government feel about it? Answers to these questions and others like them involve facts from research and judgment.

As you go through this review, write down potential roles for public relations given the issues you see. CSM public relations issues can be considerable and complex. In new programs there is the fear that contraceptive advertising promotes controversy. There can also be genuine ignorance about the dangers of not family planning.

Misconceptions about particular methods of contraception can be prevalent in both new and sustaining CSM programs. Governments and Ministries of Health change players.

Ask yourself questions to accurately define the issues. Think about the other IMC tools you have to make sure the issues are best addressed by public relations. Consider the impact of past public relations efforts.

Let's take a hypothetical sustaining CSM program example. Suppose research suggests that we have an issue where sales have been adversely affected because of negative reactions associated with using CSM oral contraceptives. Who are these people? What is the specific nature of the problem? Is it prevalent throughout our audience or just among a specific segment (e.g., rural users)? What factors contribute to the problem? Improper usage? Misinformed salespeople? Constant brand switching? Illiteracy? How difficult is this group to reach? The answers to these questions, and others like them, will suggest different uses of public relations to solve the problem.

In a hypothetical introductory environment we might run into another type of scenario. Assume we need to conduct a campaign to create a more receptive environment for our program. What are the population trends and dangers we can leverage? What is the economic impact of overpopulation? Are we seeing changes in family structures? Are there geographic areas where these efforts are most pronounced? What myths exist about particular family planning methods? What cultural or religious taboos will come into play? What other organizations have common interests to ours? Perhaps there are opportunities for collaboration. The answers here will affect the type of audiences we target as well as the strategies we identify.

PHASE II: Objectives, Strategies and Implementation

With the preceding analysis as background, you are now in a position to determine where public relations fits in the context of marketing objectives and strategies, and other IMC efforts. This requires the development of a public relations plan. This document functions much like the advertising strategy did for copy development. It documents exactly what you hope to achieve and how you plan to do so. It keeps the process of identifying public relations strategies focused and integrated, rather than haphazard. The following components should be included:

1. Marketing/CSM program objective
2. Public relations objective(s)
3. Target audience(s) description(s)
4. Geography
5. How p.r. fits with other IMC efforts
6. Strategies
7. Assessment criteria
8. Timetable

1. Marketing/CSM program objective.

This is simply a restatement of broader marketing goals and strategies, to provide an overall context for your public relations plan.

2. Public relations objective(s).

These objectives will unify all elements of the public relations plan. They must be consistent with marketing goals. They should specify an action required and the behavior change involved. They should be realistic, clear and measurable. It is not uncommon for public relations objectives to be multiple, directed at different target audiences.

Here are some hypothetical CSM examples:

- To create favorable attitudes towards CSM contraceptives among (government target audience), so they will support CSM programs.
- To inform and educate (medical target audience) about CSM products so they will recommend them to their patients.
- To build credibility for CSM products among (consumer target audience) so they will be more receptive to our messages.

3. Target audience(s) description(s).

There are many potential public relations target audiences for CSM programs. They can range from opinion leaders, to gatekeepers, to influentials, to middlemen/the trade, to end-consumers. Your task is to segment, understand and prioritize these audiences so specific efforts can be directed to them. Research and judgment come into play here. Looking across CSM programs we see some of the diversity involved:

Medical/Trade

Doctors
Nurses

Midwives
Pharmacists
Retailers

Community

Community Leaders
Right to Lifers
Civic Associations
Women's Associations
Market Women's
Associations

Government

Ministers of Health
Civil Servants

Population Officers
Ministers of Interior
Ministers of Information

Media

Censorship Boards
Editors

Religious

Catholic Church
Evangelical
Churches
Anglican Church
Muslims
Islamics

You will need to ask yourself which audiences are most important at the "macro" level (e.g., physicians vs. midwives, community groups vs. the church)? We are generally aiming for segments of substantial size, that are interested in our benefits, open to our message and reachable. We should then develop a "micro" understanding of these groups. Since groups are composed of individuals, it is helpful to talk about the targets on that level.

Develop a paragraph that describes an individual from the target audience(s) in terms of demographics, behaviors, beliefs and lifestyles. Media habits are audience traits that should always be included in this description. This description should be similar in form to the media description you developed for your advertising program. If you have more than one target audience, you will need more than one description. But distinguish your primary target from secondary targets. Everyone is not of equal importance.

Here is an example of a hypothetical public relations target audience for a new, low dose, oral contraceptive in a sustaining CSM program:

"The mid-wives association in Las Montanas region is comprised of women in their 30's. Most of these women are mothers with 2 - 3 young children at home. They have up to grade seven level of education and have been trained in contraceptive technology and midwifery. They pride themselves in being well-informed and up-to-date. They promote other CSM condoms and oral contraceptives to their patients, in addition to their traditional midwifery duties. They want to provide helpful, accurate advice, and have expressed some concern about the side effects many of their oral contraceptive patients experience. These midwives share the same media habits that other women of their age do -- primarily community radio listening and reading photonovellas."

This level of detail helps guide you later in formulating strategies. Some of the public relations techniques that might be effective against this group might include: a mid-wives conference to introduce and train them on the new pill, developing a brochure they can circulate to their patients, including a "call-in" telephone number for the association on radio and photonovella advertising for oral contraceptive information.

This type of target audience definition is important for large groups. But you will always have key individuals (e.g., Ministers of Health) who must receive individual public relations attention. It is vital not to overlook these people's interests as public relations strategies are considered.

4. Geography.

If your public relations efforts are to be directed nationally, that should be indicated. If target audiences are geographically segmented (rural vs. urban; one section of the country versus another) you should note that, with some indication of where the majority of your effort will go.

5. How public relations fits with other IMC efforts.

This is a helpful statement to include to ensure that your IMC efforts remain integrated. Simply think through what public relations is bringing to your marketing plans. Is it broadening the reach of your message to new audiences? Is it extending your advertising campaign theme into different media? It may be helpful to refer to the capabilities of public relations to stimulate your thinking in these areas.

6. Strategies.

Public relations strategies are the tools that help you accomplish overall public relations objectives. These strategies are quite versatile. The same strategy, if designed differently, can accomplish different objectives. For example, a brochure might be used to provide instructional information on proper use of VFT's; or it might be used to highlight the benefits of family planning.

In determining which strategies to select, it may be helpful to first think in terms of broad media channels you might want to use. Such channels might include mass media, printed materials, peer organizations and/or face-to-face contact. There is diversity within each of these.

For instance:

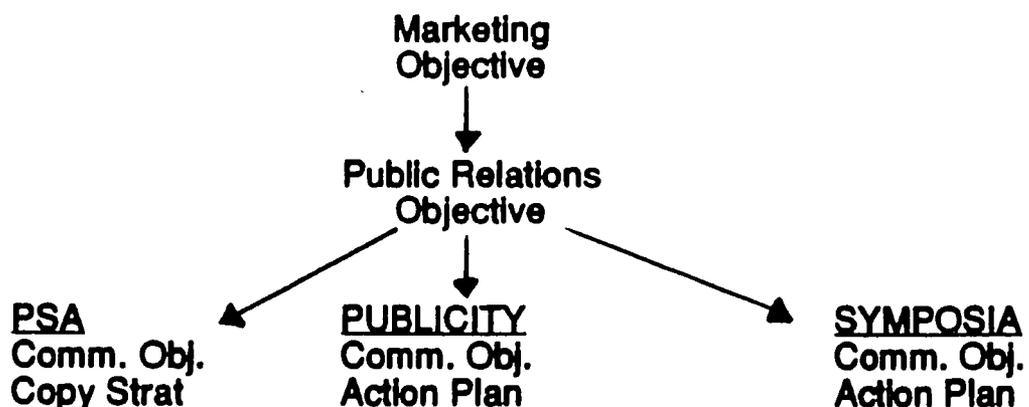
Mass Media
Newspapers
Broadcast
Magazines

Peer Organizations
Professional associations
Community groups
Civic associations

Printed Materials
Brochures
Booklets

Face-to-Face Contact
Seminars
Symposia
Counseling programs

Once you've determined which channels seem most appropriate, you can get more specific about which strategies to use (e.g., conferences for specific associations, feature stories, radio talk shows). Establish "communications objectives" for these strategies since not all communications tools have similar capabilities. A broadcast Public Service Announcement (PSA), for example, provides different information than a training seminar would. Later, you will also need to develop specific action plans and/or copy strategies for the tools you've chosen (e.g., a copy strategy for a PSA, a press list for publicity, etc.).



It may help to conduct a "brainstorming" session with other professionals (from the CSM project, the Advertising Agency) to come up with various ideas. There is no "ideal" combination of public relations strategies that constitute an "ideal" plan. The strength of the plan traces to the clarity of your objectives, an imaginative use of various strategies, and your ability to get them implemented. We must also remember to integrate these strategies, wherever possible, with each other and the other IMC tools.

We will discuss the various types of strategies, and how to use them, in more detail shortly.

7. Assessment criteria.

You need to establish criteria so that you can measure the effectiveness of the strategies you've selected, the appropriateness of public relations materials, and public relations progress against objectives. Specific assessment tools will be dealt with under Phase III: Implementation and Evaluation.

8. Timetable/flow chart.

Be sure to establish some sort of timetable or flow chart (similar to the media flow chart), which indicates when public relations efforts will be scheduled. For example, when launching new CSM programs you will always want to precede advertising efforts with publicity. The successful Morocco Protex launch began public relations radio talk shows in June, 1989, for a September, 1989 kick-off.

It may be helpful to do a combined flow chart containing advertising, public relations and media events to maximize integration.

Press List

Before we look at individual strategies, let's briefly review how a Press List is compiled. Since public relations revolves around publicity, it is vital to know what your resources are. A comprehensive, accurate and up-to-date Press List should be kept on hand by the media relations specialist in your office. Since media representatives change jobs frequently, it takes special effort to keep track of those covering population/family planning issues. A basic press list should include:

- National and international wire services -- typically the news editor;

- **Local newspapers and news magazines -- news and feature editors as well as reporters who cover related issues such as health and education;**
- **Local radio and TV stations -- news or assignment editors as well as talk show hosts and producers, program directors and journalists;**
- **Specialized newsletters and magazines, including medical journals, women's and men's magazines, health reports and youth newsletters;**
- **Leaders of allied agencies, board members and key volunteers who need to be kept informed of your agency's activities.**

The telephone book is often a good resource for putting together a press list. In some cities, the press association and the leading advertising agencies are willing to provide a basic list. In most cases, you will need to contact each media outlet to obtain the names of the appropriate people. Be sure to re-check the names and addresses on your list every six months or so.

As you identify other interested media representatives through either personal contact or monitoring of articles or programs, add them to the press list. For key media outlets, it may be helpful to maintain a card file on each reporter, editor or producer, noting issues of particular interest and topics covered in the past, as well as deadlines, copy and photo specifications, and other requirements.

Strategies

Selecting appropriate strategies and determining imaginative ways to use them is the essence of public relations. There are a variety of strategies that can be used by either sustaining or introductory programs to address any number of public relations objectives.

Let's take a closer look at various public relations strategies you might consider, and how to go about implementing them. You will soon recognize that the implementation issues that surround these strategies, and the creativity involved, make it vital to have an experienced media/public relations specialist on hand. The strategies include:

- | | |
|-------------------------------------|--|
| 1. Launch events | 14. Books and brochures |
| 2. Advisory councils | 15. Special events |
| 3. News conferences | 16. Educational efforts |
| 4. News releases | 17. Joint partnerships |
| 5. Major reports or studies | 18. Sponsorships |
| 6. Newspaper articles | 19. Letters to the editor |
| 7. Feature stories | 20. Influencing radio and TV shows |
| 8. Advice columns | 21. Cultivating columnists and editorial writers |
| 9. News stories with human interest | 22. Cartoons |
| 10. Endorsements by public figures | 23. Newspaper advertising supplements |
| 11. Public service announcements | |
| 12. Radio and TV talk shows | |
| 13. Feature programs | |

1. Launch events.

Launch events are used to announce the introduction of a CSM program with creativity, imagination and constructive publicity. They are mainly used to "generate excitement". In many countries, launch events fit with introductory objectives of generating widespread, public awareness quickly. But when a lower profile is preferable, launch events obviously should not be done.

Think of the event as the beginning of a continuum of public relations efforts -- it is the point of origin which sets the stage for other events to come over the life of a CSM project. Launch events, thus, require several considerations:

Logistics: Establish the date, place(s) and time of the kick-off, making sure it immediately precedes major marketing efforts (e.g., advertising launch), but that your program is in place to move forward (e.g., distribution achieved). The kick-off may be in one location or several. For example, in Indonesia the kick-off spanned 11 cities. Make sure you have administrative help to assist you with the many details.

Guest List: Carefully consider everyone who needs to be invited. Err on the side of being more comprehensive rather than less comprehensive. Include key opinion leaders, influentials and gatekeepers. Make sure your list of media personnel doesn't overlook anyone.

Theme: Identify a theme for the launch. Tie it to your other communications tools if possible.

Host: It is helpful if you can get a prominent local leader to host the event. This adds to its prestige, legitimacy and publicity. For example, in Indonesia, the governor of Jakarta presided over the Jakarta launch of Blue Circle's contraceptive line.

Speakers: Determine who will speak, and how many speakers there should be. In Indonesia's Blue Circle launch in Jakarta, speakers included the Governor, the Head of BKKBN (family planning association), and the Minister of Interior Affairs.

Strategies: Will there be a main attraction? What exciting print materials or other devices will you use? Will you include an open question and answer forum? There is no end to the diversity here. For example, the Blue Circle launch included elements such as:

- A helicopter carrying a BC van
- BC banners installed in major streets
- BC balloons
- Printed programs
- Mobil units carrying BC billboards
- BC stickers
- BC T-shirts and caps for participating officials

Materials: Naturally you will need to obtain materials for all the strategies you identify. Beyond these you should also include:

- Press kits - containing news releases, copies of speeches, photographs, fact sheets and the like.
- Refreshments - plan what will be served.
- Audio/visual aids - determine what will be needed in this regard.
- Invitations.
- Prepared question and answer information sheets - these will assist speakers with the facts in question and answer sessions.
- Advertising and other communications material.

2. Advisory Councils.

Advisory Councils are organized groups of individuals representing diverse factions, constituencies or organizations who agree to work together to help achieve CSM goals. The importance of a strong, helpful Council cannot be underestimated in the introduction and sustainability of CSM programs. Its composition will vary by CSM country, and it may be more or less productive depending on its composition and mandate.

There is no "ideal" composition for Advisory Councils, as the "ideal" varies by the task at hand. While there may be little choice in some of the members who sit on the Council, carefully identify and recruit the members you can. Look at the various constituencies you need to affect -- the government, the church, the media, women's groups, family organizations, the medical community, and recruit the most influential people. For example, it may be that the person who is most influential in the religious community is a prominent businessman with strong religious involvement. Seek individuals with a strong social sense who will be advocates for the CSM program.

In Liberia, for example, the overriding principle of Advisory Council recruitment was to select potential members as CSM advocates. This can often be pre-determined by the sorts of social issues prospective members are active in. Liberia's council has included members as diverse as: a female Methodist minister with social/family concerns, a television personality who is capable of discussing sensitive personal issues on the air and desensitizing them, a respected physician who talks to the medical community, and the Minister of Information, a government communications liaison.

Establish a clear mandate for your Advisory Council. Regularly schedule meetings with members and provide honoraria, luncheons and the like. The CSM Manager should "formally" apprise Council members of marketing and communications decisions. Council members provide input and advice, but are not involved in operating activities. "Informally" Council members should be expected to exert influence on key sectors of the community that can help or hinder CSM programs. Identify further ways to incentivize this group (e.g., publicity for its achievements, dinners and awards) to maintain their interest and commitment.

3. News conferences.

News conferences are used to assist the media in covering a story of major importance that is too complex to be handled adequately in a news release. News conferences have been held throughout the CSM world. They are integrated into kick-off programs, used to publicize new advertising campaigns and are periodically called for any number of important sustaining CSM events.

Before scheduling a news conference, contact a few friendly media representatives to solicit their advice on the topics, timing, venue and other details. Planning should take into account the differing interests and needs of print and electronic media. If the local press association is willing to co-sponsor it, the news conference will take on added importance and visibility.

Important issues to consider in scheduling a news conference are:

- **Speakers** - identify one to four articulate, poised experts or leaders who know the topic well and can respond to questions accurately.
- **Place** - select a site convenient for media representatives. If indoors, make sure that it can accommodate lighting and sound equipment, that microphones are available (if needed) and there is enough room for reporters.
- **Timing** - schedule the conference several hours ahead of most reporters' deadlines. Typically, morning hours are best, since deadlines are in late afternoon for the TV and radio news and morning newspapers. Try to pick a slow news day; mid-week is usually best.

Once the news conference is set, prepare a "news alert" which clearly states the topic to be covered, date, time, place and speakers. Several days in advance of the conference, this alert should be sent, or hand-carried, to all local media outlets -- city editors of newspapers and wire services, news editors of radio and television stations, as well as staff of specialty publications or programs covering health, science, social welfare or related areas. If your city has a daily listing of media events, be sure your conference is listed.

The day before the conference, call key media outlets and contacts you know personally to remind them of the event. If they cannot attend, offer to hand-deliver background materials, a news release summarizing the results, or other items they may need to cover the story. Don't overlook the possibility of making audio or video recordings of the conference or interviews with the main speaker(s) and providing copies to radio and TV reporters.

Prior to the conference, prepare or collect all necessary background materials, including a list of participants, a news release, brochures and press clippings. Compile and circulate media press kits to the participants. Designate a coordinator, whose job is to greet reporters, supply information and advise on the position of cameras and microphones, and an assistant coordinator, who should be available to order coffee, make a phone call or locate a repairman. Brief the speakers and make sure that they are able to answer difficult questions and that they can reflect your position on key issues.

On the day of the conference, arrive early to make sure that all arrangements are in order. Ask the press to sign in so that you can contact them in the future. Start the conference on time. Speakers should make brief presentations and offer to answer questions. The coordinator should stay in the background but be prepared to intervene if the discussion is side-tracked from the main issues or if the session goes on for too long.

4. News releases.

A good news release can win major coverage for your story. It is most likely to obtain media coverage if:

- It reports an event or situation that significantly affects or involves many people;
- It draws attention to the situation through dramatic well-documented new estimates or predictions. The Population Information Program, for example, calculated that 5.8 million deaths would be avoided each year if women in developing countries followed the safest pattern of childbearing. Through the wire services, this dramatic estimate was covered around the world;
- It deals with a controversial issue. Secure and well-established family planning organizations sometimes raise controversial issues purposely or take controversial stands -- even if they may draw criticism -- to obtain news coverage and focus public attention on important issues;
- It involves or quotes a well-known person, such as a major political figure, a popular entertainer, or a sports star, or;
- It reports an amusing or unusual event or occurrence.

A news release has the best chances of obtaining coverage if it is written as a ready-to-print story. Reporters are always under pressure to produce more stories, so they use releases that need little further investigating or rewriting. A news story always begins with the most important, most interesting information. Details and additional, less important information follow. News releases should follow the same style.

5. Major reports or studies.

A major study or report can be planned from the start with an eye to publicity: What can be done to make the study newsworthy? Since most news reporters do not have time to read long, technical reports, a good news release summarizing a study will greatly increase chances that the topic receives coverage. The news release should begin with a simple statement of the most important, most impressive conclusion of the study. Then it tells who made the conclusion and where, including the name of the organization issuing the release. Authors, researchers and organization directors may be quoted to emphasize important study findings. Outside authorities and policymakers can also be asked to comment on the importance and implications of the findings. These quotations must always be clearly approved by the people being quoted. Before quoting anyone, be sure that they will be willing to answer any questions from the news media.

CSM research studies have proved to be useful in this regard. Some of these studies show that the public wants more information on family planning, or on particular methods, or are in favor of contraceptive advertising. Think about studies you might leverage in this regard.

6. Newspaper articles.

News and feature items covered in newspapers tend to be timely, topical and localized. Sources for articles include: national and international wire services, local events, news releases, telephone calls and conversations. CSM Media relations specialists need to know current topics in the news and to the interests of individual writers and editors.

Because most family planning stories usually fall outside the realm of fast-breaking hard news, they tend to be used as "fillers" and are dropped if more timely news stories come in. To increase the chances of CSM stories being used, CSM media relations specialists should pay careful attention to deadlines and to reporters' work schedules. Articles submitted early in the day stand a better chance of being printed than those received close to deadline. Also, reporters like to write articles for weekends and holidays ahead of time so they don't have to work on those days. If you provide news releases well in advance with suggestions for articles to run on the holidays, the stories often receive more coverage than they would have on a routine news day.

7. Feature stories.

Newspapers and magazines frequently publish articles that look beyond current events to larger social trends or new ideas. In addition to providing background information, these articles generally have a human interest aspect to show how the larger trend affects individuals or how individuals have contributed to the trend. You can play an active role in suggesting CSM topics for feature stories to editors and writers and helping to shape the article by:

- Providing facts, research findings and other background information;
- Suggesting experts to be interviewed;
- Furnishing charts, graphs, photos and other illustrations;
- Helping to locate family planning users and other lay people to be interviewed;
- Clarifying confusing or conflicting points of view; and
- Spotting inaccuracies before publication.

The involvement of outside agencies in the preparation of feature articles depends largely upon the personal relationship between the writer and the agency. Most writers will welcome, or tolerate, an offer to review a story before publication or airing but will almost certainly object to any attempt to require review or to exercise veto power.

8. Advice columns.

Because people are interested in and curious about all matters pertaining to human reproduction and personal relationships, advice columns are very popular and are often one of the best-read sections of newspapers or magazines. While most publications may not have the resources or expertise to produce a regular advice column, they might be willing to print columns prepared by CSM staff. Once ground rules, including topics to be covered, deadlines and procedures for handling correspondence, have been established with the editors, the CSM Manager needs to designate an individual to be responsible for the column. Letters selected should represent common problems or misconceptions. Replies should be factual, but also compassionate and witty.

Establishing a Blue Circle contraceptive products column in leading women's magazines in Indonesia is part of Blue Circle's public relations plan. It will provide a special section for questions and answers about family planning and Blue Circle products. It will be managed by a well-known family planning doctor and the editorial writer of the magazine.

9. News stories with human interest.

The public is always interested in the names and faces behind the news, and therefore news editors often look for the human dimension in a news story. Feature stories, interviews and photographs of the personalities behind the news are often of greater interest than the news event. Make it easy for the media to cover CSM newsmakers by providing background information on them, suggesting story angles, creating photo opportunities (or providing a photo) and scheduling personal interviews. Examples of photo opportunities include: award luncheons and dinners, meetings, fairs, symposia, contests and training seminars.

10. Endorsements by public figures.

Media attention is drawn to public figures, including political leaders, traditional chiefs, actors, socialites, religious leaders, authors, prominent business heads, sports heroes and other celebrities. Statements by public figures, even on subjects outside their area of expertise, frequently receive extensive media coverage. To identify celebrities willing to make public statements in support of CSM issues, interviews and other media coverage of likely candidates should be monitored. Those celebrities identified can then be contacted either directly or through your Advisory Council members or other high-level leaders who may know them personally. Suggest their participation in specific events or media appearances and offer to help them prepare statements. Do not be discouraged if several celebrities decline to participate. If you are persistent, you will eventually find a willing speaker.

Plan the event or media appearance carefully and work closely with the celebrity and his or her staff to ensure that all details, including the content of the statement to be presented, transportation, and advance publicity, have been covered. Scheduling well in advance and making the appearance as effortless as possible for the celebrity will reduce the chances of a last-minute cancellation. Remember that the celebrity is looking for favorable media exposure for being associated with a worthy cause. Do not expect him or her to acquire an in-depth mastery of your issues or to behave in a manner that contradicts his or her public image.

11. Public Service Announcements (PSA's).

Radio and TV stations are often in need of short pieces to fill broadcast time between music, programs and commercials. Some stations invite individuals to read a story or editorial over the air. Others welcome ready-to-air public service announcements (PSAs) and/or written announcements that can be read by an announcer. As station needs and formats vary widely, it is important to meet with the program producer of each station to determine the appropriate length and format for PSAs. Some stations will provide free studio time to record PSAs if they are committed to the social issue. Sometimes well-known radio and TV personalities are willing to tape PSAs free of charge.

If you are providing ready-to-air broadcast PSAs (television or radio) you will need to involve your advertising agency in its creative development, much as you do when they develop advertising campaigns. They will need a copy strategy, time for executional development, testing and production.

If you are providing a written PSA to the station consider the following guidelines:

- **Messages should be timed to run from between 10 seconds to 60 seconds and should be submitted to stations in varying lengths (usually in 10 second increments);**
- **Include on CSM project letterhead the name and telephone numbers of a contact person;**
- **Carry a release date [either "For Immediate Release" or "For Release: (date)"] on the upper left hand corner with the heading "Public Service Announcements" below it;**
- **Feature the title and length of the spot in the center of the page;**
- **Be triple-spaced, using short paragraphs;**
- **Use only one side of the paper;**
- **Be clearly legible whether photocopied or mimeographed; and**
- **Don't use onion-skin paper, since it rattles and creates irritating background noise when spots are read over the air.**

In all cases, be sure to thank the station for running your PSAs and continue to submit new PSAs on a regular basis.

12. Radio and TV talk shows.

Radio and TV talk shows are one of the best ways of promoting informed discussion of CSM issues and are very popular with the general public. We have used, and even produced, radio talk shows in CSM projects in Morocco and Jamaica. In Morocco, for example, we used radio talk shows to generate discussion about family planning, male responsibility and the role of the private sector in family planning. Various opinion leaders from the medical, academic and religious community participated.

Talk show producers are always interested in hearing about possible guests or topics to cover; they are under constant pressure to come up with new and exciting programs every day or week. Before approaching talk show producers, listen to or watch the show several times to ascertain its format and general approach to the topics it covers. Then draw up a list of possible guests or topics, which might include:

- Articulate and well-informed senior staff or CSM advocates who have expertise in a specific area or could address some ongoing public debate (for example, should contraceptives be advertised?);
- Individuals who have had some interesting or special CSM-related experience (perhaps they have attended an international conference or have traveled extensively in remote/rural areas);
- Satisfied users of CSM products;
- Prestigious local or outside experts who may not be affiliated with the CSM project, but have valuable insights and information;
- Individuals who have made childbearing and lifestyle decisions that suggest a new social trend (such as a trend toward later childbearing or smaller families);
- Well-known public figures and traditional and religious leaders who are willing to give their views on family planning/CSM issues.

Once you have a list of possible speakers and topics, arrange a meeting with the talk show producer to review your ideas. Be alert to the producer's own interests and to links with other topics planned for the talk show. Even if all your ideas are rejected, encourage the producer to call you for ideas and help. Offer to provide a speaker on short notice in the event of a guest's cancellation.

Call the producer every month or so with new ideas. In promoting program ideas to talk show hosts and producers, be pleasant but persistent. Don't be discouraged if many of your ideas are rejected. The few times that you are successful will result in highly visible informed coverage of your issues.

13. Feature programs.

Feature programs (television, film, or radio) can also be developed and produced to leverage CSM issues. These were discussed in detail in the Entertainment section (Section 3), and require access to writers and production resources.

The Indonesian Blue Circle contraceptive project is to develop and execute a TV feature program to discuss Blue Circle social marketing issues. The Minister of Health, the Chairman of BKKBN (Indonesia's family planning board) and various other officials would be included in the program. In Sri Lanka an entertainment-oriented "game show" television program is being explored. Radio dramas have been used in Jamaica.

This type of programming can be very effective in driving home CSM messages to key target audiences.

14. Books and brochures.

Generating written materials in the form of books and brochures is a way to pass valuable CSM information along to key constituencies, as well as to generate added publicity.

Informational brochures directed to important middlemen, the trade and/or end-consumer audiences, should follow much the same process as developing print advertising. You will need to develop specific objectives for such materials, along with copy strategies and the copy points that need to be included. You will also need to oversee the development and production of such materials. Pre-testing these materials can also be important given the nature of the communications, to ensure the message is clear.

There are a variety of uses for such materials -- from passing them out at family planning clinics, to giving them to physicians and other middlemen, to including them in retail stores and pharmacies, to using them in press kits. In fact, one brochure on the stork campaign that was included in a media press kit was actually published, verbatim, in one of the leading newspapers.

Books that are written on the importance of contraceptive social marketing or other CSM-related issues can also be distributed to select members of key constituencies. If CSM personnel have co-authored or contributed to such publications, they may be involved in media tours and publicity campaigns to generate awareness for the book.

15. Special events: (contests, symposia, conferences).

The CSM project can develop special events that can be designed to generate positive publicity for the project, as well as reinforce specific information. Identify objectives for such events. Consider a number of possible themes. Who are your target audiences? Consider how to tie such events to other IMC efforts. Determine whether you might want to partner with another organization (public or private) to help defray costs and broaden your resource pool.

Conferences, symposia and forums usually bring together professionals from relevant constituencies to either receive CSM information or discuss CSM issues. Themes for such events might tie to your advertising program for example (e.g., male responsibility). The format you choose will dictate the logistics and staffing involved. A round table discussion requires a moderator, conferences involve various speakers etc. Publicity can be generated around many such events.

Consumer related special events might include developing contests (e.g., Father of the Year), or taking the CSM story on the road to various regional fairs. Publicity generated around these events makes them especially attractive.

16. Educational efforts.

Offering educational resources such as training courses and materials, internships, scholarships and technical assistance are other strategies to consider.

Technical trainings among key CSM middlemen perform a dual role. They are an important marketing function that ensures our products get into the right hands and are used correctly. But they also provide publicity material by the community service they offer. Such trainings have become standard operating procedures in many CSM countries (e.g., pharmacists in Brazil, chemical sellers in Ghana). When trainings are complemented by promotional events such as a "Mystery Shopper" contest, they become even more newsworthy (see trade promotion in Section 5).

In addition to technical trainings, think through other educational public relations strategies. For example, offering internships, or scholarships, and technical assistance to public interest organizations might be good opportunities for sustaining CSM program publicity.

17. Joint partnerships.

Developing joint partnership programs in which several constituencies unite in a common effort provide other opportunities for special events and publicity. Professional associations of pharmacists, chemical sellers and midwives are likely candidates for CSM-sponsored partnership programs. But broader based collaborations involving more unusual combinations are also attractive. Partnership programs between traditional healers and business leaders, for example, offer added public relations opportunities.

To explore this, you should think through potential partnership combinations in your country and determine which types of collaborations will be most productive. Don't overlook partnerships with the private sector. Private sector firms often have the resources and manpower to help organize and defray costs to the CSM program. Set objectives and work through basic logistics before approaching prospective partners.

18. Sponsorships and piggybacking.

As an alternative to developing special events yourselves, you might consider sponsoring various events that involve key constituencies. For example, in many countries we have explored sponsoring established national conferences for women's organizations, medical practitioner organizations, and pharmacists.

In other cases, we have combined CSM interests with other organizations' scheduled events. For example, in Liberia, we launched the CSM program around the government-sponsored "Health Week." "Health Week" is a coordinated program involving events at churches, schools, etc., where information is provided on issues like immunization, oral rehydration, and so forth. We met with the coordinating committee for Health Week to set up CSM displays and do sampling at the scheduled event locations.

19. Letters to the editor.

The "Letters to the Editor" section of newspapers and magazines provides a forum for opinions, reactions, and rebuttals from both organizations and individuals. It is widely read and provides an opportunity to set the record straight after an inaccurate or biased CSM article has appeared; to point out the connection between a news item and CSM issues; to respond to differing points of view; and to praise a good article.

Letters to the editor should be brief, clear and to the point. Use CSM letterhead for official letters and plain paper for personal letters. Letters should be typed. Try to limit your letter to one page; it is more likely to be printed. Double check any facts and figures you use. Be polite, sincere and restrained in criticism. Don't be discouraged if your letter isn't printed, keep trying.

You can also write to radio and TV station managers giving your reactions to the programs they air, or to the lack of programs on population and family planning issues. Many radio and TV stations keep track of feedback from listeners, so a letter can be very influential.

20. Influencing radio and TV shows.

While it is not easy to make major changes in entertainment programs, it is often possible to suggest small adjustments in the story line or characterizations that can create images more favorable to family planning. For example, a weekly story about a newly-wed couple could incorporate an episode which describes the pressures on them to have a child right away. This would provide a forum for reviewing the personal, health and economic reasons for waiting before starting a family. A situation comedy could show the logistical problems of trying to meet the needs of several young children at once, or contrast a mother's longing to have another baby with her husband's practical reasons not to.

After monitoring the most popular entertainment programs, select a few that cover topics or situations that seem most promising. The credits at the end of the program will generally give the name of the program producer and chief writers, or you can telephone the radio or TV station for this information. Ask for a meeting with the producer or the most senior person involved in the program. At the meeting, provide specific suggestions for changes in the story line and characters and explain why you believe these changes are important. Suggest ideas for new episodes and offer to provide new ideas every few months. Sometimes the producer will refer you to a specific writer for further discussions.

Personal contact is essential in influencing entertainment programs. Utilize contacts CSM staff or volunteers may have with broadcasters. Invite broadcasters to special events and attend their meetings and awards dinners to expand your network of contacts. Most important of all, be prompt in meeting their requests and be creative and resourceful in developing program ideas.

21. Cultivating columnists and editorial writers.

To identify columnists and editorial writers likely to be interested in CSM issues, make a regular habit of reviewing major newspapers and magazines. Note the topics of interest to specific writers and add them to your mailing list for news releases and publications. For each new story you generate, try to think of angles that would interest specific writers. For example, a columnist who has written extensively on the problems of youth and on education may be very interested in a story on the increase in school-girl pregnancies. Contact appropriate writers and offer to provide them with additional background information. Be attentive to their needs; they are as deadline-conscious as reporters covering breaking news items.

Sometimes a columnist will insist on "exclusive" rights to the story, meaning that you will not give the story to any other media outlet. In deciding whether to grant an exclusive, you have to decide whether the coverage offered is so extensive and prominent that it would be preferable to taking chances that the story will receive widespread coverage through a variety of media outlets. Generally, it is not in your interest to grant exclusives: the story receives less attention than it otherwise would have and other reporters are resentful that you have favored one of their competitors.

22. Cartoons.

Political cartoons have a powerful voice and a loyal following among newspaper readers. They may be remembered more readily than a long article. Similarly, entertainment/social cartoons can be influential and instructive.

Most cartoonists develop ideas from items in the news or in common public discourse. Nevertheless, if you have a good idea or story line, they are usually grateful for the suggestion. Be sure your idea fits with the cartoon's format and perspective. Let cartoonists know that you are available to verify factual information and to suggest ideas on specific themes related to CSM issues.

23. Newspaper advertising supplements.

Ad supplements are the special inserts included in newspapers that are focused on one topic and contain ads from businesses related to that topic. Check with the advertising directors of local newspapers to see if any special advertising supplements on family planning, population, maternal/child health or health issues in general are planned.

If a supplement is planned related to CSM issues, send the advertising director your feature news release, fact sheets and other background information which an editor can convert into news articles. If no supplement is planned, suggest one. Typically, these special supplements rely heavily on editorial material from outside sources. You can also place CSM ads in this context for synergy.

Media Incentives

The preceding strategies directly benefit CSM programs. However, we must also consider how to cultivate and reward those people responsible for helping us achieve these strategies. We should provide incentives to the media which recognize the contribution they make towards getting CSM programs positive, constructive publicity. Productive working relationships with the media are enhanced by awards presentations. For example, we should recognize programs that portray positive family planning values. Similarly, we should provide incentives for writers to incorporate messages on sexual responsibility into their scripts.

Awards can be presented to individuals who have influenced programming or to particular films or program episodes which exemplify the media at its best in promoting responsible sexual behavior. The Center for Population Options (CPO) offers the following guidance in establishing media awards:

- Base your criteria for the selection of a winner on the media resources available in your country. If film, radio or TV programs are not produced nationally, for example, the award can be designed to honor the individuals who determine local program selection rather than writers or producers.
- Since the objective of such awards is to point up the need for responsible programming, make sure that the competition is publicized well in advance and that the awards presentation itself is covered by the media.
- Involve local media professionals in the nomination of contenders and/or selection of winners. Their involvement will increase the number of media people who are sensitive to the issues.
- Don't spread the awards so thin that you end up honoring every production that carries positive messages. A more competitive contest will recognize high quality work.

- The awards ceremony itself must draw attention to the issue of responsible programming. Your first several presentations might be planned to coincide with an event sponsored by the media industry itself -- for example, an annual writers guild dinner would provide a built-in audience of the winners' peers.
- Cash prizes are only appropriate if the amount represents a real incentive to writers and producers. A trophy or certificate is usually sufficient. CPO has created a scholarship named after the winning production, to be awarded to a student pursuing a field of study related to teenage pregnancy prevention.

PHASE III: Evaluation

The final phase of the public relations process involves evaluation. The Market Research module will deal with testing issues in detail. Nonetheless, it is helpful to touch on evaluative public relations issues here.

As mentioned at the outset of this section: "In advertising you pay for it. In public relations we pray for it." If you've developed sound plans and built the right kind of relationships with key constituencies and the media, you have maximized your chances for a successful public relations program. While there are no guarantees that all your publicity will be implemented, many of your efforts will be rewarded.

Because of the uncertain nature of public relations, it becomes even more important that we track its performance. Without evaluation you will not know whether to continue strategies in successive years.

Let's take a look at what needs to be evaluated in public relations, and how to go about this process. The evaluative tools you use will vary depending on the strategies you've chosen for your program.

Formative Evaluation

Formative evaluation, including pre-testing, is designed to assess the strengths and weaknesses of materials or campaign strategies before implementation. It permits necessary revisions before the full effort goes forward. Its basic purpose is to maximize the chance for program success before the communication activity starts. Evaluation techniques that can be used in this regard are:

Concept testing. This examines how a particular issue or CSM product should be presented and helps identify the strongest supporting arguments. Focus groups or in-depth interviews with members of the target audience are conducted for input. The testing format will vary based on the medium in question. This type of testing may be helpful for brochures, newsletters and Public Service Announcements, for example.

Materials testing. In a similar qualitative format, it is also helpful to assess whether the materials being developed actually communicate what is intended. For example, do the visuals in a condom brochure clearly indicate how to put on and remove condoms effectively?

Process Evaluation

Process evaluation examines the procedures and tasks involved in implementing a program. This type of evaluation also can look at the administrative and organizational aspects of the program. It tracks such things as the number of materials distributed, number of people who attend a special event, number of stories on TV or in newspapers and similar activities. In addition to quantity, it helps you see whether or not public relations messages are clear and consistent with previously determined copy points.

For those of you working with a public relations agency or consultant, you can ask them for this sort of evaluation. If you have developed your own plan, your in-house media relations/public relations specialist might perform this duty. Alternatively, an administrative assistant might devote several hours a month to this project.

Ask for a written report, several times a year, that assesses this information. This person will need to:

- **Clip publicity articles, noting when and where broadcast messages are run. Did you receive the volume and media articles you'd planned on?**
- **Establish whether messages are on strategy, and identify areas of confusion or negative coverage. Copy strategies and copy points agreed to early in the process provide guidelines here.**
- **Monitor logs of TV/radio stations for frequency and time of PSA airings and discuss results with public service directors.**
- **Check distribution points (e.g., for brochures) to assess materials use.**
- **Phone or meet with participating organizations to review progress and problems.**

Outcome Evaluation

Outcome evaluation usually consists of a comparison between target audience awareness, attitudes and behavior before and after the public relations program. It uses quantitative and qualitative measures necessary to help you draw conclusions about the program's effects. Outcome evaluation should provide more information about value than quantity of activity.

Techniques here include:

Tactics evaluation. Conduct qualitative research (focus groups, one-on-one interviews, telephone interviews) among selected targets to assess the impact of special events, media tours, speakers programs, trainings, etc.

Tracking studies. Include public relations questions (e.g., what sources are trusted, how do consumers learn about health issues, etc.) in broad-scale tracking studies or field special studies to see how awareness, attitudes and behaviors have changed as a result of these efforts.

Crisis Management

To close the public relations section, let's move to a brief discussion on crisis management. It is an important area of public relations, and merits special consideration.

Undoubtedly, the best way to manage crises is to prevent them. But this is not always possible. Let's take a look at some of the unexpected incidents that might occur in the CSM world that can turn into crises. They can be categorized into three areas:

1. External program factors.
These might include a change in your country's population or family planning policy and/or a change in government players. Such changes can effectively shut down a CSM program overnight.

Separately, we might see the emergence of an unexpectedly hostile group or individual who begins to generate negative publicity.

2. Product-related problems.

There are a variety of product related problems that can turn into crises. What if product tampering occurs and consumers buying CSM products are harmed? What if distribution or other organizational issues result in stabilization problems with CSM products to the detriment of consumers? What do we do if new studies or reports are issued which criticize CSM methods or products based on facts and/or rumors?

3. CSM organizational issues.

Finally there can be unavoidable issues related to the CSM organization itself. A visible employee may commit suicide or another crime. Graft may occur. Perhaps extreme adversaries to the CSM project decide to picket and vandalize its headquarters.

Circumstances like these require contingency planning on the part of the CSM Manager. A contingency plan should be developed and kept current, to be used in the event of emergency. When emergencies occur, you must be able to move aggressively and candidly. You want to be able to take the initiative in going to the public with bad news, rather than finding yourself in a reactive posture. Unnecessary delays cause rumors and negative publicity which only complicate the issue.

You need to ask yourself two questions and organize contingency plans around them: "What if?" and "What now?"

"What if?"

Sit down with senior employees to generate a number of potential crisis questions and answer them. For example, what if several local groups publish a series of articles condemning CSM methods and practices? What actions would you take? Do you want to approach these groups directly and negotiate? Would you build coalitions with other groups at odds with these? Is it time to shift the CSM strategy? Record these questions, and others, along with potential CSM responses as part of your contingency plan.

Next, think through how you would handle a crisis organizationally. To whom do you go to get the facts? Write down relevant names and telephone numbers. What constituency groups need to be communicated with directly? USAID? The manufacturer? The Advisory Council? Who will be your media spokesperson? Who alerts employees so they understand what has happened and not to comment? You need to have an organizational action plan that spells out the answers to each of these questions.

"What now?"

Suppose the crisis occurs. You must put your contingency plan into effect. Some steps to follow:

- Accept that it is a problem.
There is a tendency to minimize problems or hope that they will disappear. That can be dangerous.
- Gather the facts.
Get in touch with the right people at all the relevant organizations to find out exactly what has happened. Insist on people being candid and forthright. There can be a tendency to hide things.
- Throw all resources into dealing with the crisis.
You need to move quickly. Your contingency plan spells out who needs to be reached and what functions each person should perform. Use your resources. Perhaps the best person to advise the Minister of Interior, for example, is the chairman of the Advisory Council. You may want to brief CSM employees yourself.
- Maintain an open flow, once you know the story.
Media covering a story can be impatient and insistent. Communicate accurately when you have the information. Don't be pressured into speculation.
- Establish a pattern of disclosure.
The media and other key audiences should be kept informed of all developments during the crisis as well as afterwards. This reassures everyone that you are acting responsibly and are in command.

Here's a checklist that may be helpful in times of crisis:

- Determine the facts
- Alert the central spokesperson
- Alert employees and other relevant constituencies
- Don't release information prematurely
- Don't speculate
- Correct false information
- Keep information flowing
- Control the media as necessary

Section #5
"SALES PROMOTION"

SALES PROMOTION

A. DEFINITION AND CONTEXT

Sales promotion falls into two categories: consumer and trade. Consumer promotion is "any tactic that directly offers the consumer an outside incentive to buy a product/adopt a behavior." Trade promotion is "any tactic that directly offers middlemen and/or their sales staff, an outside incentive to stock and/or promote the product to consumers."

Sales promotion is not an unfamiliar concept to you. Various sales promotion tools are used throughout the CSM world. For the consumer, you have probably used sampling or point of purchase advertising. For middlemen or the trade, you may have offered premiums or different types of deals to make sure CSM products make it to the shelf.

The key to using sales promotion as an IMC tool, is to recognize its unique contribution to the marketing mix and integrate it appropriately with other marketing communications tools. For example, if you are advertising on a male responsibility platform, how about a Father of the Year contest for the consumer and/or the trade? It makes sense to time such a contest during an advertising "blitz" rather than before the campaign starts. Why not build on this with some publicity?

We must also recognize that various types of sales promotion tools will accomplish different objectives for CSM products. Some are particularly well-suited for new product introductions (e.g., sampling). Others can assist us in solving special problems in a sustaining CSM environment like building continuity of product purchases (e.g., bundle packs).

Among the tools we have used in CSM programs are:

Consumer

- sampling
- displays
- point-of-purchase advertising
- special events
- premiums
- sweepstakes
- cooperative tie-ins
- bundle packs

Trade

- buying allowances
- free goods offers
- dealer loaders
- push money
- sales contests

You need to recognize that every promotion tool you use represents a form of communication with the consumer and the trade. Some of these tools, when used properly, can actually help build positive brand perceptions ("value-added" promotions). Others can erode your franchise over time, by creating a "deal" only mentality. So you must choose and execute promotions carefully, being cognizant not only of your specific promotion objectives, but how your promotion activities fit with your brand's positioning and long term goals.

Along these lines, some tools work more effectively with OTC's than they will with ethical. In fact, we are often regulated in ethical promotions. In net, there are a myriad of considerations the CSM Manager must take into account as he makes promotion determinations.

B. CAPABILITIES

There are four general ways that consumer promotion can help achieve CSM program objectives. It can:

- Create a reason to buy or try
- Add value without a change in price
- Change purchase patterns
- Involve the community

1. Create a reason to buy or try.

Since promotion gives the consumer extra incentives to consider purchasing your products, it can create a reason to buy or try them that would not ordinarily be there. A free gift in the form of a premium, for example, might make a purchase of Panther condoms preferable to Rough Riders. A price pack, where the price of a package of CSM condoms is discounted for a limited time, might be another sort of trial incentive. Or maybe the consumer just needs to be reminded that you are available to try, by seeing your point-of-purchase advertising.

2. Add value without a change in price.

Promotions can also be used to bring additional value to CSM products without obviously lowering their price. Bonus packs, where consumers receive three condoms for the price of two, or a Buy-one-get-one-free sort of deal, can make the usual product more attractive.

3. Change purchase patterns.

Promotion is also an effective way to alter consumers' purchasing patterns. Let's say you are experiencing a lot of brand switching. You can build brand continuity by developing promotions that force consumers to buy your products more consistently. Collectibles such as trading stamps are tools that would fall into this category.

4. Involve the community.

Finally, promotion events can be used to involve the community, thereby creating goodwill for CSM products while providing sampling and other promotion opportunities. Sponsoring concerts for the target audience and setting up booths at community fairs are two ways this can be achieved.

The two main strengths of consumer promotion are that it provides concrete, direct rewards, and that it can create consumer "pull," or demand, for CSM products. On the downside, consumer promotion is only a short-term incentive, and over use of certain types of promotions, or poorly executed promotions, can undermine a product's quality image.

Trade promotion also has several general capabilities in CSM programs. It can:

- Build distribution.
- Generate involvement or enthusiasm in the distribution chain.
- Provide additional visibility for the product or practice.
- Increase product stocking and volume orders.
- Increase incentives to "push" the product or practice to the end user.

1. Increase distribution.

A variety of trade incentives can be used to build distribution for CSM brands. These might involve anything from direct monetary incentives, to premiums, to constructing cooperative deals with other manufacturers already present in outlets you wish to target.

2. Generate involvement or enthusiasm.

Because of the additional incentives trade promotion provides, it can generate more involvement or enthusiasm for selling or promoting CSM products than might ordinarily be so. Devices like sales contests, special premiums or dealer loaders (e.g., an unusual reusable display unit), can make CSM products become favored. If middlemen or the trade become enthusiastic, this will be passed on to the consumer in the form of featuring and promoting CSM products.

3. Provide additional visibility.

Along these lines, trade incentives can lead to increased visibility for CSM products in various types of outlets. For example, deals can be structured where a certain amount of CSM products must be put on display in exchange for monetary or free product incentives. Unusual display units assist in this process.

4. Increase product stocking and volume orders.

We can also use cash discounts and/or free product to encourage the trade to buy more CSM products than they usually would. This pulls more volume through the system than normal.

5. Increase incentives to "push" the product or practice.

Trade incentives encourage CSM products to be aggressively "pushed" to the consumer. The trade or middlemen make no profit if CSM products just sit in the warehouse. They don't benefit from sales contests if they aren't selling. Empty display units just take up space.

The main strengths of trade promotion are that it helps ensure product availability, visibility and promotion to the consumer. Its major weakness is that it can create a "deal only" mentality on the part of the middleman or trade toward the product. We must guard against creating a situation where CSM products are only stocked if there is something extra in it for the dealer.

C. RESPONSIBILITIES

As you are well aware, the CSM Manager has the responsibility for promotion planning, implementation and evaluation. While you can ask for supplemental promotion ideas from your Advertising or Public Relations agency, you are the expert and final decision maker on what is feasible.

Planning requires a thorough knowledge of your own marketing objectives, as well as the actions of competitors in the marketplace. You must be intimately familiar with the range of promotion tools at your disposal. You must know how to set your promotion budget, and account for the impact of promotion on sales. And you must also determine how best to integrate promotion with your other marketing communications tools to maximize impact.

On the implementation front, you need to know the logistics of your environment and the resources available to you. How do the big private sector companies handle promotion? What are they doing that you aren't? Are there opportunities for cooperative ventures where you can take advantage of their manpower and resources?

Finally, you must be able to evaluate what you have executed, to understand if similar activities are worth pursuing in the future. This is one area that has been neglected in many CSM programs in the past. In most cases, if a promotion does not generate sales, it is not successful.

We will touch on many of these areas in this section, with an emphasis on planning and evaluation. The Strategic Marketing module will deal in more depth with these issues in the context of your marketing plans. The logistics of implementation will not be addressed, due to its variability by CSM environment and specific promotion events.

D. SALES PROMOTION PROCESS

There are three sales promotion phases:

PHASE I: PRE-PLANNING REVIEW AND ESTABLISHING OBJECTIVES

During this phase, you need to review your marketing objectives, target audiences, past promotion performance, competitive and business environment, and other IMC plans. This becomes the groundwork for then establishing promotion objectives.

PHASE II: DEVELOPING STRATEGIES AND PLANS

With objectives established, you now develop appropriate strategies and plans. This will likely be an iterative process where you will need to consider various strategies, their respective costs (out of pocket and labor), how to coordinate trade and consumer efforts, how to coordinate promotion and media and the like.

PHASE III: POST-EVALUATION

Here you need to determine your testing and evaluation plot. You must make sure you have measurement systems in place to track efforts for the future.

PHASE I: Pre-planning Review and Establishing Objectives

This step should be very familiar to you by now, since it precedes actual plan development for virtually all IMC tools.

Basically, you need to gather and analyze all marketing facts of relevance to setting promotion objectives. This should include a review of:

- CSM sales and share history and trends
- Category and competitive sales and share data
- Distribution patterns and trends (CSM brands and competitors)
- Pricing patterns and trends (CSM brands and competitors)
- Selling chain and margin information
- Product and consumer lifecycle data (Are you in introductory or sustaining mode? What will get consumers to try your brands?)
- Geography
- Seasonality
- Other IMC tools being used

This information should lead you to identify potential promotional problems and opportunities for both consumers and the trade. Look at these in the context of your overall marketing goals and identify relevant consumer and trade promotion objectives. Write them down. As with all IMC objectives, promotion objectives should be clear, specific and measurable. Let's consider some hypothetical CSM examples:

	<u>Introductory Mode</u>	<u>Sustaining Mode</u>
Consumers	<ul style="list-style-type: none">• To generate initial product trial• To build trial among users of less effective methods• To build the new user base• To build in-store awareness	<ul style="list-style-type: none">• To increase continuity of purchase• To build usage• To load consumers• To decrease brand switching
Trade/ Middlemen	<ul style="list-style-type: none">• To gain distribution• To expand into new distribution outlets• To generate professional recommendations• To build brand loyalty	<ul style="list-style-type: none">• To increase in-store merchandising and featuring• To induce stocking of larger volumes• To gain shelf space and position• To increase professional recommendations

These examples are not necessarily exclusive to sustaining versus introductory programs. For example, building in-store awareness might be as important for a CSM sustaining brand as it is for an introductory brand.

Further quantify the objectives you've established. Set a range if need be. What distribution level do you hope to achieve? What consumer trial levels are acceptable? These numbers become the goals against which you can later evaluate your performance.

PHASE II: Developing Strategies and Plans

Once objectives are set, you are able to develop promotion strategies and plans. These plans are usually not formatted as stand alone documents, such as you have developed for media and public relations. Rather, they are part of your CSM Marketing Plan.

Throughout your Marketing Plan you will have identified the relevant target audience(s), geography, seasonality and distribution issues for your brands. You may want to restate this information in the promotion section under objectives and/or strategies, to set the appropriate context for your promotion efforts.

As you develop your promotion plans, you should expect to end up with three things: a plan consisting of various strategies to meet consumer and trade objectives, a budget for funding these efforts, and a flow chart that indicates timing, continuity, and how trade, consumer, and media activity will interact.

Let's begin with a discussion of strategies you might consider for consumer and trade promotion, so you are familiar with the options open to you.

Consumer Strategies

Trial/Repeat/Increased Purchase

It is helpful to think about the consumer strategies you might use in the context of three broad types of consumer promotion objectives: "trial" purchases, "repeat" purchases and "increased" purchases.

Trial is usually the paramount consumer objective for new CSM programs -- whether it is to build trial among new contraceptive users or users of less effective methods or users of competing products. Awareness generation is often closely linked to trial generation in introductory programs, although advertising and public relations are your primary IMC tools for accomplishing this.

Trial can also be an objective for sustaining programs. This is particularly true if you are trying to expand your existing base of users or generate re-trial among lapsed users.

Needing to generate "repeat" purchases is more typical of consumer objectives in sustaining CSM programs. In sustaining environments, we may discover that consumers do not have much brand loyalty -- one time they buy CSM brands; the next time they buy a competitor's brand. Or perhaps a new competitor has entered the marketplace and is wooing our users.

Promotion, alone, cannot build brand loyalty. Advertising and public relations are the IMC tools better suited to that. But promotion, in this context, can provide short-term rewards to current users so they will be more inclined to stay with CSM brands despite other activity in the marketplace.

Generating "increased" purchases or use is also a typical category for consumer promotion objectives in sustaining CSM programs. When do you want to do this? One of the biggest sustaining program problems we face is erratic or irregular use of CSM products or contraception in general. If we have "loaded" the consumer with CSM products, he or she may be more likely to contracept more consistently. They won't want to waste the products they have bought. There are various ways we can use promotion to help ensure more CSM products are on hand.

"Trial," "repeat" and "increased" purchases. Categorize your consumer promotion objectives into one of these categories. If your objectives fall into a "trial" categorization, you will select and design promotion strategies to make that first purchase of a CSM brand as easy as possible. If your objectives fall into a "repeat" categorization, you will structure promotion strategies to get the consumer to buy CSM brands every time they make a purchase. If your objectives fall into an "increased" purchase categorization, you will be structuring promotion strategies so the consumer receives more of your product every time he or she makes a purchase.

Let's look at the hypothetical CSM promotion objectives we previously identified to see how they might be categorized:

Hypothetical Objectives

- | | |
|--|---------------------------|
| • To generate initial product trial | Trial |
| • To increase continuity of purchase | Repeat |
| • To build trial among users of less effective methods | Trial |
| • To build usage | Increase |
| • To build new user base | Trial |
| • To load consumers | Increase |
| • To build in-store awareness | Trial/Repeat/
Increase |
| • To decrease brand switching | Repeat |

Potential Consumer Strategies

Now that we've classified our objectives by type, we need to identify strategies that can achieve them. Many promotion strategies we chose can be structured to be trial-oriented, repeat-oriented, etc. This requires creativity and imagination. For example, a sweepstakes or contest could be developed to accomplish trial or repeat consumer promotion objectives. For trial, it might involve a very exciting theme, and a requirement for one proof of purchase for the consumer to be eligible. For repeat, perhaps three proofs of purchases would be required.

Here are some of the consumer promotion strategies we've used most frequently in CSM programs. You will see that while some may inherently fall into one category or another, others are more flexible. Once you know what category your consumer promotion objective falls into, you can design your strategies and consumer program accordingly.

Strategies

Sampling	Trial
Trial sizes	Trial
Point-of-purchase advertising	Any (awareness generator)
Displays	Any (awareness generator)
Special events	Any (awareness generator)
Sweepstakes, lotteries, contests	Any
Cooperative events	Any
Premiums	Trial or Increase
Bundle pack	Increase
Collectibles	Repeat
Buy-one-get-one-free	Trial or Increase

1. Sampling.

Sampling involves distributing a small size of free product (e.g., two condoms or VFT tablets), to invite consumers to try your brand. It has been used throughout the CSM world. While not inexpensive, it is an excellent way to maximize the chance that consumers will try your product.

In Mexico, Protektor condom samples were distributed with explanatory leaflets in Conasupo stores, their distribution source. Sampling can also take place at sporting events, during market days, at the workplace or anywhere you expect the target audience to be. In Indonesia, Dualima condom samples have been included in new baby packs distributed at hospitals.

When you sample, make sure you provide enough product so consumers actually get to try it. A single condom or VFT tablet may be insufficient. A new user's first reaction upon receiving a sample may be to open it to see what the product looks like. A second product, is thus necessary to actually ensure trial occurs.

If a leaflet encloses the sample, make sure it is small enough (e.g., pocket sized) so that it isn't automatically discarded because it is cumbersome.

Sampling may be a less viable tool for ethical CSM products. However, you might give free samples to middlemen (e.g., physicians) and ask them to pass a month's cycle on to appropriate consumers, for free, as a trial device.

2. Trial sizes.

Trial sizes are smaller than normal sizes of products, that are priced low and sold in traditional outlets. Again, this encourages trial because it requires very little expenditure on the part of the consumer. If he/she likes what they try, presumably they will be back to buy larger sizes.

Apply the same minimum guidelines for establishing trial sizes that you do for sampling.

3. Point-of-purchase advertising.

Point-of-purchase advertising is a particularly important awareness generating tool in virtually all CSM countries. It serves as a reminder to buy CSM products in the store, when the purchase decision is actually being made. These reminders are important throughout the life of a CSM project.

Point-of-purchase forms range anywhere from the old tin plates that were once used in rumstores in Barbados, to in-store stickers, posters, mobiles and decals. In some instances, these materials are virtually the only way in which CSM brand names are advertised (e.g., many African countries). When posters and stickers are placed in store windows, it can cause consumers to enter the store to seek CSM products.

Since point-of-purchase is a form of advertising communication, we need to keep a couple of things in mind. Such advertising may relate to a specific promotion event (e.g., sweepstakes) or be general branded advertising. Tie into your main advertising campaign slogan and graphics wherever possible for integration. Remember the limitations of the medium and environment. Except for places like doctor's offices or clinics, consumers will likely be in a hurry to make purchases and leave.

Graphics and layouts should be impactful, simple and clear, and express one idea only. This is not the place to sell all the merits of your brands -- other forms of mass media better provide that function.

Finally, consider how to be distinctive in a highly cluttered environment. And look for ways to ensure that your posters stay up long enough. For example, calendar posters have been used in Latin America to help with longevity at point-of-purchase.

4. Displays.

Displays are another way to build in-store awareness of CSM brands. They can also be used in clinics to hold CSM brochures or free samples. Displays provide an additional helpful function in the CSM world, because they don't require the consumer to ask for the product from the retailer directly -- this is sometimes inhibiting. Displays are helpful throughout the life of a CSM project.

Various types of hanging displays and counter displays have been used all over the CSM world. We have also run display contests among the trade (e.g., Indonesia). Graphics, colors, and slogans on display units should be tied to other CSM communications for synergy. Try to be creative with these devices, but don't forget practical considerations. Pilferage can sometimes be a problem. An on-shelf display that is too large for the counter won't get used. And make sure any wording you put on the display can't be misconstrued. The "servez-vous" language on Morocco's Protex condom display units was misinterpreted as meaning the product was free!

5. Special events.

While special events are used in public relations as well as promotion, there are distinctions between the two. In sales promotion, we often take advantage of an existing event rather than creating a new event for our purposes.

Taking advantage of special events like the rally car races in Barbados and music sponsorships (e.g., the Calypso concert in Trinidad, the Miami Sound Machine concert in Barbados) can add spice to a new product launch or encourage repeat purchases. These help associate the product with a relevant and desirable symbol in the eyes of the target market. They also provide opportunities for sampling, flying stadium banners, passing out leaflets and the like. Additional events to take advantage of might be fairs, market days, or sponsoring cricket and baseball teams. In Ghana, for example, the CSM group may sponsor a four month soccer competition. They have budgeted for prize money, banners at the 10 locations where the matches will be played, weekly press advertisements, etc.

It is important to remember, however, that special events have a less immediate impact on sales than more direct promotion incentives (e.g., premiums).

6. Sweepstakes, lotteries and contests.

Sweepstakes, lotteries and contests are various types of games (requiring different levels of skill) consumers can play to win prizes. These add excitement to CSM purchases, generate awareness for the brand, and can be used to gain new users or reward current users. Depending on the way such events are structured, they can build regularity of purchase, generate trial, or even increase purchase amounts.

For example, a contest might be designed to promote more regular CSM product use by requiring several proofs-of-purchase. A sweepstakes that involves only larger sizes would fulfill an increased purchase promotion objective. And a contest, sweepstakes or lottery where only one purchase must be made for eligibility, might work as a trial generator.

In designing any of these events you need to think through the logistics involved as well as your objectives. Make sure you can manage the process. Structure events simply -- needlessly complex events are not well-responded to.

Additionally, you must remember USAID's "informed choice" policy when planning events such as these. USAID will generally not fund events where prizes are given as reward for purchasing. Where CSM programs have implemented such events they have been funded by distributors.

For example, in Ghana, a lottery drawing has been designed to increase combined sales of Kamal VFT's and Panther condoms by 30%. Retailers will be informed in advance that the event is going to take place. They will also be eligible for a special prize for participating, and a quantity discount will be offered if they increase their usual purchases of Panther and Kamal.

Consumers will be instructed to collect several box tops from either Kamal or Panthers and put them in a box located in the participating retail stores. They will need to include a form containing their name and address, along with the name of the store where they made their purchases. This form will also have a simple sentence that must be completed (perhaps the advertising slogan). Consumers also have the option of mailing in this information, with the box tops, to various addresses if they so choose. In-store boxes will be cleaned out every two weeks or so before the lottery drawing. There will be several classes of prizes, including consolation prizes. The event will be advertised.

This event will be managed by the distributor for CSM products. It is a good example of an unusual consumer offer, where consumer and trade programs are coordinated and media is used to further integrate the effort. The distributors' handling of the event makes the logistics easy for the CSM project.

In Jamaica, a similar promotion was conducted successfully in 1974 to build repeat Panther condom purchases. In this instance, the CSM group worked with independent wholesalers to implement the promotion. We gave these wholesalers free stock, as an incentive.

7. Cooperative tie-ins.

There are many different combined events that can be explored with other manufacturers. The way these events are structured, will dictate whether they serve trial, repeat or increased purchase promotion objectives.

You want to make sure the partner product has a positive track record. Ideally, you also want to partner with a company whose products complement CSM products. For example, in Indonesia we ran an exceptionally successful tie-in event where Dualima condoms and Gillette razors were sold in a combined package. The same target audience was interested in both products. In Ghana, they are exploring a cooperative offer where oral contraceptives would be banded together with sanitary napkins.

One key advantage of cooperative events is that you may expand your user base. Consumers who ordinarily buy Gillette razors, for example, might try Dualima condoms for a change since they are packaged together. Another advantage of such events is that you can use the resources of another manufacturer to help defray costs and make logistics easier for the CSM project. Such events can also be very helpful in expanding distribution, as we will discuss shortly.

8. Premiums.

Premiums are desirable items that are given to or sold to consumers for a nominal additional fee. This is an additional incentive to buy CSM products. Again, the way you structure the premium will determine how it works for you.

In Jamaica, a vanity case with the Perle logo was given to consumers if they bought six cycles of oral contraceptives. This was highly successful -- 2,000 cases were gone in five weeks.

In Honduras, USAID made a plastic pink pill case available containing a mirror, so women could carry oral contraceptives with them discreetly. It was used as an introductory offer. If consumers bought three pill cycles they would get the case for free; or they could buy the case for one dollar. The plastic pink case contained a blue lady logo, the generic logo for oral contraceptives.

There are any number of premiums you might consider. They can be packaged inside or outside of CSM boxes. Personal care items such as combs, nail files, razors, razor blades, etc. could be considered. A condom case holder might be another idea.

9. Bundle packs.

"Bundle packs" is the term used to describe several packages, banded together, at a lower price than the packages could be bought for separately. This device is an excellent way to load the consumer to increase usage. The thinking behind this is that if consumers have plenty of product on hand, they may use it more frequently and/or consistently. This device is also a good way to keep loyal CSM users out of the marketplace if new competitors are around.

10. Collectibles.

Collectible devices are primarily used when you want to build repeat purchases. Trading stamps are a typical collectible device where consumers are issued stamps for particular purchases which they can use to buy various types of gifts.

But trading stamps aren't the only collectible devices. Airlines and fast food outlets often run collectible games where cards are given out containing certain information or letters. When the consumer has enough letters to spell a word, for example, he gets a prize. Collectible games can be printed and distributed as separate entities, or they can be included inside packages or printed on packages.

The use of collectibles is being considered as a CSM promotional tool in Africa. Thought has been given to putting various letters for P-A-N-T-H-E-R underneath the package lids on Panther boxes. This is similar to what Coke has done underneath its bottle caps. When the consumer has enough letters to spell Panther, he can mail the lids in and be eligible for a prize. Such events can be explored as cooperative ventures with other manufacturers.

11. Buy-one-get-one-free.

This is a way of providing free product to consumers as an additional incentive for their purchase. It is a way of loading consumers, for a price, and might be used with various types of CSM products.

There are other types of consumer promotion devices that have not been as fully explored by CSM programs. In these cases, the complicated logistics needed such as a good mailing system make such devices very difficult to implement. Coupons and refunds fall into this category.

Coupons are certificates from the manufacturer that the consumer gives to the retailer at the time of purchase, to receive a discounted price on what he is buying. Such certificates are collected and redeemed by the retailer from the manufacturer. Coupons usually result in a sales boost during the time of the offer. However, there can be problems with misredemption, and the trade often dislikes the logistics of handling them.

Refunds involve "money-back" that the manufacturer gives the consumer, when the consumer sends in proof-of-purchase. Sometimes premiums are also made available in this "mail-in" fashion. Again, the difficulties of mailing and redemption practices in many CSM countries make this type of promotion difficult to implement. This type of event is a less effective trial generating device than coupons because it is less immediate. The manufacturer often has a lower liability for that very reason, however.

Putting the Consumer Plan Together

You have determined what your objectives are, and whether they involve trial, repeat or increased purchase. You are familiar with various types of strategies. Now you need to think through a variety of possible combinations of events, along with their associated costs, impact and timing. The answers here result in your promotion plan. You will need to consider the following:

1. Combination of events
2. Target audience dynamics
3. Size of the incentive
4. Conditions for participation
5. Media vehicles for the promotion
6. Logistics for the promotion
7. Duration of the promotion
8. Timing of the promotion
9. Overall sales promotion budget

1. Combination of events.

Regardless of your objectives, you probably want to end up with a promotion plan that involves a balance between awareness generators, "value added" events and "price incentive" events. Price incentive events are those which provide a direct, short-term price incentive to buy your products. Buy-one-get-one-free's, sampling and trial sizes work on this level. "Value-added" events are all others which bring an unrelated product incentive to the brand. Premiums, sweepstakes and the like fall into this category. Awareness generators are your point-of-purchase and display tools.

Awareness generators are important, but if you only had them in your promotion plan, you would not experience the benefits of the high sales boosts you get with more direct incentives. An over-reliance on "price incentive events" gets expensive and can create a situation where consumers only want to buy your brand if it has a special price. This is not good for building brand loyalty and a strong franchise. An over-reliance on "value-added" events is not good either. Many of these events are hard to quantify (e.g., special events) and can get very expensive due to the logistics involved. Hence, you need to strike a balance.

Price incentives and awareness generators are often regarded as the base of the promotion plan. Some of these might be used throughout the year. If you are in an introductory environment you have different considerations than you will in a sustaining CSM environment.

In an introductory environment, you need to spend more on promotion, and look for high impact, high sales/share generating events. Here you want to make sure to include some type of sampling and perhaps a trial size, along with a couple of unusual exciting events (e.g., sweepstakes). Awareness generators will also be very important.

In a sustaining environment you will be more interested in repeat or continuity building efforts. Price incentives like bonus packs or Buy-one-get-one-free's might be attractive. Perhaps you will want to complement this with one major value added event like a sweepstakes, designed around multiple purchases. A lower level of awareness generators might be sufficient.

There is no science involved in promotion planning. For example, you might have two or three buy-one-free's or bonus packs over a 12 month period. On the other hand, you would probably only want to sample once because of the costs involved. Value added events like premiums and sweepstakes are also usually considered one-time events over the course of a year.

You can learn from past experience, what your competitors or other packaged goods companies are doing, and what other CSM projects have done. If you are in doubt about a particular event and it will require a significant expense, why not test it? Take a small geography, representative of your general marketing situation, and run the event in it. What impact does it have on sales? How manageable were the logistics?

2. Target audience dynamics.

As you design events, don't forget who your target audiences are. If you are interested in young males who may be experiencing their first sexual encounters, you will want several trial events with a youth-oriented focus where possible. This might involve sampling at sporting events, rock concert sponsorships and a contest with stereos for prizes. You might use similar types of events for a young married target audience but they will have a different focus. Sampling at supermarkets and contests with home-oriented prizes might be considered, for example.

3. Size of the incentive.

Depending on the promotion events you are considering, you will need to determine the size of the incentive. Start with the assumption that sales will increase with the size of the incentive. But sales will probably not increase at the same rate indefinitely. On the other hand, if you don't hit a certain minimum incentive, you won't get consumer response at all.

Large consumer companies have sales promotion managers who keep records on the effectiveness of different promotions so incentives can be correlated with sales. Since we don't have this luxury in CSM programs, perhaps we can look at the sort of incentives other manufacturers use for comparably priced items. Or we might learn from competing brands.

4. Conditions for participation.

You need to decide who, where and under what conditions consumers are eligible for CSM promotions. The overriding principle here should be to structure events so that you are most likely to encourage prime prospects, and discourage those unlikely to become regular users. Do you want consumers to demonstrate proof-of-purchase? In what form (e.g., box tops, sales receipts)? Do you want to place age or sex restrictions on the offer? Such restrictions may be more viable for certain types of promotions than others. Where should the offer run -- nationwide or in a particular geography (e.g., the capital)?

Consider the most important eligibility restrictions and proceed from there. The overriding principle in any promotion is to "keep it simple." If conditions are too restrictive you may discourage participation.

5. Media vehicles for the promotion.

Will the promotion be supported by media? If so, how?

Bundle packs, buy-one-get-one-free's and the like are usually flagged in-store with point-of-purchase materials (e.g., shelf-talkers, displays), or are not advertised at all. Special events, sweepstakes, and so forth, may receive supplemental advertising either through mass media, in-store banners, etc. All these decisions have costs associated with them.

As a rule of thumb, the bigger the event the more it may make sense to advertise. Remember that it is important to use a promotion theme that complements your brand's positioning or even leverages your advertising campaign. If it leverages your advertising campaign, you may simply want to "heavy-up" your advertising presence for the duration of the promotion to maximize synergy.

6. Logistics for the promotion.

How will the promotion get to the consumer? If proofs-of-purchase are required, should they be mailed in or put in an in-store box? How should samples be distributed? By a man in the street? By mail? At sporting events? Will you put collectible devices inside the package or print them on the box? There are a multitude of logistical and cost implications associated with these decisions.

7. Duration of the promotion.

Another issue is the length of the period sales promotions should run. If they are offered for too short a period, many prospects will not have a chance to take advantage of them, since they may not be repurchasing at the time or be too busy with other things. If the promotion runs for a long period, then the customers may begin to view this as a long-term price concession and the deal will lose some of its immediacy and also raise questions about the brand's quality. Many studies suggest that an optimal frequency is about three weeks per quarter and optimal duration is the length of the average purchase cycle. This varies, of course, with the promotion objectives, customer buying habits, competitors' strategies, and other factors.

8. Timing of the promotion.

You will need to decide how to time your promotions. If, for example, you plan four to six events a year, you should lay them out on a "flow chart" (similar to the media flow chart) so you can assess the overall scheduling. Remember you must take into account trade promotion (trade and consumer events work best together) and your media schedule. A combined flow chart that includes each one of these is helpful to construct.

In regard to promotion timing, decide when your events will work best. For example, you may want to avoid or schedule something around holidays for example. You must also make sure you have enough time for important "pre-planning" logistics. It takes time, to develop promotional materials and any associated media materials. The sales force needs time to "sell-in" extra promoted product to retailers. You may want to do some competitive homework. You don't want your promotion to be just one of many the consumer will see that week.

9. Overall sales promotion budget.

The overall budget for sales promotion can be arrived at in two ways. It can be built from the ground up, where the marketer decides on the various promotions to sponsor during the year and estimates the cost of each. The cost of a particular promotion consists of the total administrative cost (printing, mailing, and promoting the deal) and the incentive cost (cost of premium or cents-off, including rate of redemption), multiplied by the expected number of units that will be sold on the deal. In the case of an in-pack premium, the deal cost must include the costs of procurement and packaging of the premium offset by any price increase on the package.

The other, more common way to arrive at an overall budget for sales promotion, is to resort to a conventional proportion of the total budget for advertising and sales promotion. For example, toiletries may get a sales promotion budget of 20 to 40 percent of the total promotion budget, whereas packaged goods may get as much as 30 to 60 percent. These proportions vary substantially for different brands in different markets. They are influenced by the product's lifecycle stage and competitive expenditures on promotion.

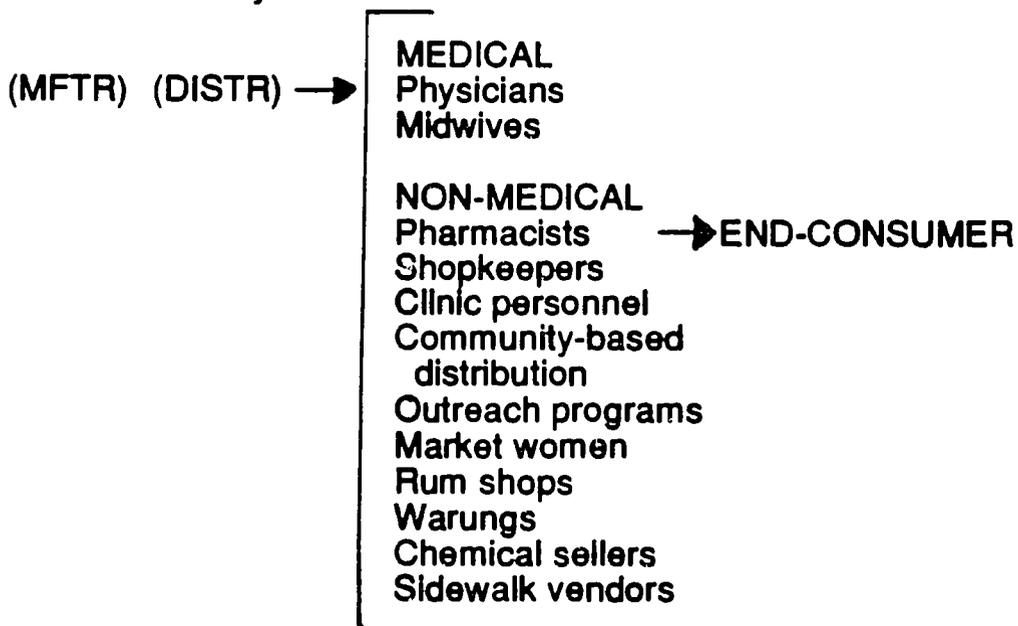
Budgeting in CSM programs will be covered in more detail in the Strategic Marketing module.

Trade Strategies

Target Audiences

Before we discuss specific types of trade promotion strategies that can be used in the CSM world, we need to understand who the target audiences for trade promotions are. These are most easily identified by taking another look at the selling chain we developed for our brands back in the early stages of IMC planning (see Section 1B4).

The selling chain represents all the intermediaries who operate in-between the manufacturer and the end-consumer. These are the people who directly sell our products to the consumer. In the CSM world, this chain has many potential links. One or more of these groups are probably important to each of you.



Some of these intermediaries are medical personnel, others (e.g., pharmacists) might have a certain amount of technical training, and still others are purely business people. We must recognize the diversity of these groups to promote to them effectively.

Medical personnel require unique sales treatment. "Detailers," who are specially trained and are hired by the pharmaceutical manufacturer, sell and promote to physicians and midwives directly. Detailers have the background and skills to speak to these groups on their own terms. This subject will be handled in other training Modules because it is so specialized. What is important in the context of IMC, is not to forget that these groups exist and will need incentives.

In this module, we are primarily interested in how we can incentivize the variety of non-medical groups that sell our products (from oral contraceptives to condoms). It is important that we don't overlook anyone.

Potential Trade Strategies

Earlier we discussed potential CSM trade objectives for incentivizing middlemen or the trade. Let's refresh our memory on these, to provide a context for discussing strategies and plans. If you'll recall, some of these objectives are more typical of introductory CSM programs whereas others are more common to sustaining programs.

- To gain distribution
- To expand into new distribution outlets
- To generate or increase professional recommendations
- To build brand loyalty
- To increase in-store merchandising and featuring
- To induce stocking of larger volumes
- To gain shelf space and position

There are several types of promotion strategies we can use to address these objectives and others like them. They can be classified into three basic areas:

1. Deals or merchandise offers
2. Advertising and display allowances
3. Direct stimulants to retailers and their salespeople.

CSM programs have largely used tactics in the first and third categories, since advertising allowances tend to require the resources of larger networks of retailers (e.g., chain stores).

1. Deals or Merchandise Offers

Deals or merchandise offers are designed to encourage the trade to buy and sell CSM products in exchange for additional sums of money. The way these offers are structured will dictate which objectives they fulfill. An offer on a particular type and/or size of product will result in one type of performance. A broader structured deal will result in another type of performance. The value associated with such deals is critical. If you aren't competitive, it won't be attractive.

- Buying allowances.
This is a price reduction offered for a specified amount of goods. With product at a lower cost, the retailer has more of an incentive to promote it to the consumer. He will make more money with each consumer sale. In Barbados a 5 - 10% allowance on each box of Panthers was offered.
- Free goods offer.
Here the retailer is offered additional merchandise in exchange for purchasing a specified amount of goods. This provides the retailer with more inventory to promote to the consumer, and since the goods are free, his profit is higher. Again in Barbados, for example, a free 1/2 box of Panther was offered if the owner bought five boxes rather than his normal order of three boxes.
- Black bonuses.
This type of deal was given by distributors to the warehouses that stock CSM products in Indonesia. In this case, the distributors establish quotas for warehouse sales. If these quotas are exceeded, the warehouses receive a cash bonus or even gold. This is not recommended. It is an artificial manipulation of the market and there is no guarantee that the product will end up being promoted to the consumer.

You can see how these types of offers would be attractive to most types of sellers -- whether sidewalk vendors or market women or rum shopkeepers or pharmacists. In an introductory program, such offers can help gain distribution or let you expand into new outlets. In sustaining programs, such offers can be vital to maintaining or gaining shelf space and position. They might also be used to increase the stocking of larger items. There, you structure the deal to be good only on the sizes you want pushed.

2. Direct Stimulants

Direct stimulants involve compensation over and above regular salaries or commissions, for the sale or purchase of a specified amount of the manufacturer's product. This has met with some enthusiasm in CSM projects.

- Buying loaders.
These items are given as gifts to retailers for stocking and/or selling a specified amount of merchandise. For example, pens and lighters were given away to store owners and salesmen during the Moroccan Protex sell-in. Calculators were given out to store clerks in Columbia for every 500 Tahitia condoms sold. Prescription pads containing the stork were given to pharmacists when the stork campaign was launched in Brazil.
- Consumer events with trade appeal.
Sometimes it is possible to structure a consumer event that also has unique appeal for the trade. Cooperative events are one such structure. For example, if you are trying to either gain distribution or expand distribution into new outlets, you can facilitate this process by partnering with a manufacturer who is already in your target outlet. A retailer who sees you associated with a popular brand feels a greater likelihood of immediate guaranteed sales so he will be more inclined to stock you. If you combine this event with a deal or merchandise offer it becomes even more attractive. Once the retailer sees that your brand moves, he will be more likely to build loyalty to you and re-stock.

For example, one of our most notable tie-in events involved Dualima condoms and Gillette razors in Indonesia. The CSM project there wanted to gain distribution into "warungs." Gillette was already established in these outlets. The similarity of target audiences and the compatibility of both products made the fit right from a consumer promotion point-of-view. A free "Click" razor was offered with the purchase of three condoms. We decided to test this effort on a limited basis in a few cities to see how it worked.

Salesmen were hired who went out on bicycles and canvassed a small group of warungs for two months. Each warung was visited. The salesmen wore jackets with the Dualima insignia. T-shirts were given to warung owners. The promotion was supported with a radio tagline on regular Dualima commercials.

Warung owners generally bought about three of these premiums. The premiums sold well, and warung owners went directly to warehouses to buy additional premiums when they ran out of them. The event ended. Six months later, when the CSM group checked its distribution in the outlets that received the promotion, it found a 61% in-stock rate for Dualima condoms. That's Dualima condoms not associated with this premium. This event thus worked to build distribution in Indonesia and is being expanded.

- Push money.
This is a cash bonus or a discount on merchandise offered to retail store employees. It amounts to an additional commission paid by the manufacturer to retail salespeople for promoting his products.
- Sales contests.
Contests among salespeople and store owners can provide additional incentives to promote CSM products. For example, in Barbados a contest was designed to increase Panther sales and display. Various monetary prizes were given to store owners and key salespeople who showed the greatest increases in sales and the best displays. Most key retailers on the island participated and several newspaper articles featured the winners. Based on this contest's success, it was incorporated into Panther's launch in Trinidad.

A display contest was also conducted in Indonesia around the Christmas season. Retailers were given one month to plan and set up displays. The family planning association was involved in the judging. The winner designed his display in the form of a Christmas tree and received a television.

One of the most popular and successful CSM contests is the "Mystery Shopper" contest. Variations of this contest have run in Peru (condoms), Brazil (oral contraceptives) and Morocco (condoms), among other CSM countries. This is an excellent way to integrate several aspects of the marketing mix including trade promotion, training, advertising, and public relations. Let's take one example where a Mystery Shopper contest is planned: Morocco.

In Morocco and most other CSM countries, pharmacists go through CSM sponsored training to ensure a proper understanding of our products and consumer targets. We want to make sure this information is understood, and that CSM products are promoted to appropriate consumers. In Morocco, mystery shoppers will visit appropriate CSM pharmacies, posing as average consumers, and ask pharmacists to recommend a condom. To qualify for the contest, Protex condom posters and point of purchase materials must be visible, the Protex condoms themselves must be visible, and the pharmacist must recommend using "Protex condoms for family planning." The names of pharmacists who meet these conditions will be collected and a winner drawn. There will be media coverage. The winner will receive exciting prizes (e.g., television sets).

- Display loaders.
Here the display itself is given to the retailer in exchange for a specific amount of purchase. Obviously, the more unusual the display, the more attractive the offer.
- Sampling and point-of-purchase materials.
Samples are given to the trade throughout the CSM world to encourage them to promote new CSM products to consumers. This is best used as an introductory device. If the consumer likes our products he/she will come back and buy them.

Point-of-purchase materials such as brochures and posters were discussed in the context of consumer promotion because that is the primary purpose they serve. But these materials are also trade incentives because they make it easier for the trade to explain our products to consumers.

Additionally, you can design point-of-purchase materials with particular trade appeal. In Pakistan, the CSM program manufactured neon signs for the trade which could be put in their store windows. The signs consisted of the name of the store along with the Sathi condom name, logo and colors.

Coke and Pepsi do this throughout the developing world. In Zambia, Coke and Pepsi have also run display contests where the winning retailers get their store fronts painted with the store name and Coke/Pepsi logos.

Advertising and Display Allowances

Advertising and display allowances are used to reward retailers for advertising and displaying CSM products. However, devices in this area have largely been unexplored in CSM programs because they require that the store itself have an on-going advertising program that informs the public of its features, sales, etc. Such devices include:

- Cooperative advertising - here the retailer is given an advertising allowance for each unit or case of manufacturer's goods purchased, as reimbursement for advertising he does that mentions the manufacturer's products. Rigid standards can be set by the manufacturer regarding exactly how product advertising should be structured. For example, if a retailer were to run an ad featuring two products, one of which is a CSM brand, you might only pay for half the media cost.
- Dealer listing promotions - This is product-based advertising by the manufacturer, where the retailers' names (and sometimes addresses) are included. In exchange for this, the retailer buys a specified amount of product.
- Merchandise allowances - This is compensation given to retailers for including or featuring the manufacturer's products in their displays or advertising.

As the distribution systems in some of our CSM countries become more sophisticated, some of these devices may become more viable.

Putting the Trade Promotion Plan Together

You need to go through the same thought processes in putting together the trade promotion plan, that you did for consumer planning. To recap, this will involve determining the:

1. Combination of events
2. Size of the Incentive
3. Conditions for participation
4. Media vehicles for the promotion
5. Logistics for the promotion
6. Duration of the promotion
7. Timing of the promotion
8. Overall sales promotion budget

Determining media and distribution vehicles for the promotion are less complex in trade promotion planning. Retailers are usually informed of promotions by the sales force. While there may be some "teaser" mailings sent in regard to the promotion to make it more exciting and/or warn retailers their time is almost up, these are less extensive than what is usually done for consumers.

Try to structure events so you don't create a "deal" only mentality. You want to build loyalty for CSM brands among the trade, as much as you do among consumers. Larger, less frequent events may have greater impact than continuous low value events. But your business and competitive environment will strongly affect what can be done.

Promotion Guidelines

Successful consumer and trade promotion planning is an iterative process. You will find yourself needing to make trade-offs between efficiencies and effectiveness, much as you did in media planning. Here are some questions to ask yourself as events are considered:

- What specifically is the promotion to do?
- What is the competition doing?
- Is the promotion consistent with the product positioning and other marketing plans?
- Are there opportunities to integrate it with other communications tools?
- Is it flexible and simple?
- What type of logistics are required? Are they manageable?
- Is there an opportunity to advertise?
- Is there an opportunity for display or p-o-p support?
- What are the cost considerations?
- Do we have experience with this type of promotion? If not, do other companies in our area?
- Should we test?

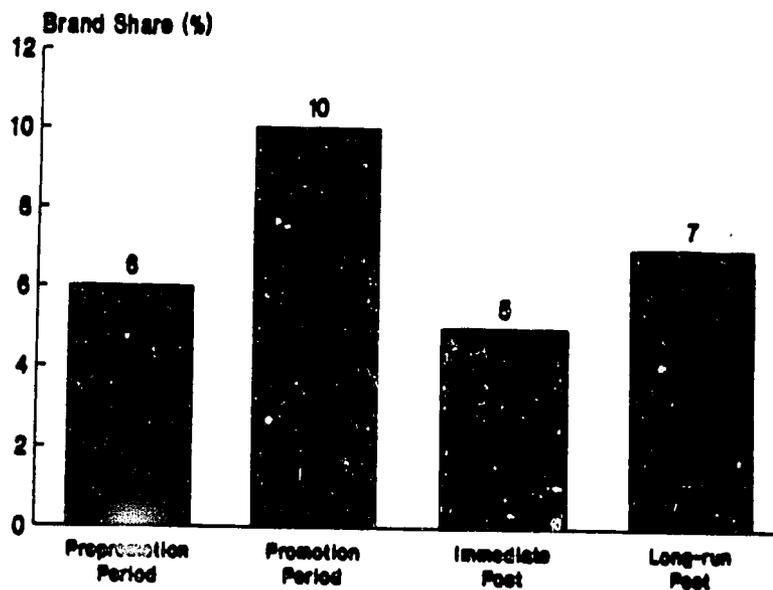
Remember to construct a combined flow chart that includes consumer promotion, trade promotion and media activity. These elements must be integrated to maximize impact.

PHASE III: Post-evaluation

Sales promotion evaluation and the calculation of pay-out will be discussed, in detail, in the Strategic Marketing module. The important concept to focus on here is that the ultimate objective of all promotion is to increase sales and/or build market share. That is the long-term goal of trade promotion as well as consumer promotion, even though trade incentives may get at this less directly. This is why it is so important to tie these elements together.

If you don't have evaluation systems in place you will not know if your events are successful. The most common consumer promotion evaluation technique is to compare sales or market share before, during, and after a promotion. Increased sales are attributed to the impact of the sales promotion program, all other things being equal. The "ideal" type of sales or share profile looks like this:

Pre-Post Technique



In the pre-promotion period, the hypothetical CSM brand had a 6% market share. During the promotion period, the brand's share rose to 10%. This gain might be attributed to new users who were stimulated to try the brand, deal-prone consumers who just switched brands because a special incentive was offered and/or brand loyal CSM consumers who might have increased purchases because of the offer. Immediately following the promotion market share drops to 5%. That's because consumers were probably overstocked and needed to work down their inventory. After this adjustment period, share rises again to 7%. This probably reflects an increase in loyal CSM brand customers, spurred by the promotion.

It is important to remember that this type of pattern will not be true for certain types of promotions. Sampling, for example, doesn't follow this since product is given out for free. Special events, like sponsorships also play more of a good will role so there you are looking for more long term gains versus an immediate sales hit. But the promotion events that involve a direct incentive (e.g., sweepstakes) should reflect a pattern of sales or share increase, decrease and then a long term increase. If you don't see any increase in sales or share at all during the promotion period, something is wrong.

Another way to measure the effect of a sales promotion program is to interview a sample of consumers in the target market, attempting to learn how many consumers recall the promotion, what they thought of it, how many took advantage of it, and how it affected their subsequent brand-choice behavior. This method would not be used for each promotion but only selectively to research the effect of particular types of sales promotions on consumers. This might be a good way to evaluate the impact of some of the less direct events like concert sponsorships, or to get more in-depth knowledge of special events like sweepstakes.

Whatever your marketing environment, the important thing is to establish some sort of evaluative technique. Promotion is expensive. You need to know if your dollars have been justified.

Section #6
"IMC SUMMARY"

IMC SUMMARY

At the outset of this module, we noted that the IMC approach simply asks four things of the CSM Manager:

- That he be knowledgeable about his audiences and marketing environment
- That he be able to think strategically
- That he have a solid familiarity with the various communications components (advertising, public relations, sales promotion) and
- That he be imaginative in using and integrating these components in accomplishing his marketing communications goals.

While you were already knowledgeable, we have reviewed ways to look at potential CSM audiences and marketing environments that will allow for greater integration among your marketing communications tools. We have discussed various mechanisms and made suggestions for better strategic thinking -- from the five pre-planning disciplines, to market maps, to guidelines for advertising concept development, to planning and evaluating structures for media, public relations and sales promotion.

We have looked in depth at advertising, public relations and sales promotion. We've talked about how to develop, evaluate and/or manage these important programs. We have also looked at specific examples of what has been done, or might be done, in the CSM world.

Throughout everything, the common thread has been integration. We have learned that integration begins at the earliest stages when objectives are defined, and carried through as strategies for communications tools are drafted and executed. Integration should be everywhere -- from the combined flow charts we use for planning, to the complementary communications objectives and strategies we select, to the use of common graphics, slogans and colors.

With integrated marketing communications we can better realize CSM program goals. By extending our reach, and delivering our message with greater impact, we can increase our return on investment.

With this knowledge in hand, we are armed and ready to take on any challenge the CSM world has to offer.

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