

# Quest 2016 – Delivery 4

## Insight and Marketing

### Guidance Notes

Issue 1 July 2016



#### Outcomes

- Target audiences are clearly identified and targeted through effective use of planning, engagement and marketing tools.
- Insight and data is used proactively to influence the culture of the organisation and to identify and change consumer behaviour.
- Products and programmes are effectively promoted and carefully priced to attract and retain customers.
- Partnerships are used effectively as distribution channels and routes to market to extend reach and market penetration.
- There is a clear return on investment and evidence of impact in terms of activity levels and market development.

Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<b>PLAN</b>					
<b>How does the organisation identify and develop its unique selling points (USPs) and brand proposition? How does it use insight and market research to engage its target markets?</b>	<p>The organisation is unclear on its Unique Selling Point (USPs) and there is a lack of shared understanding on who are its main customers (are these B2C or B2B) and how to reach them.</p> <p>There is no marketing plan or strategy and limited/restricted access to skills and resources.</p>	<p>Available market research and customer insight/data is being used to help identify its USPs and its main customers and to develop a marketing strategy or plan.</p> <p>There are clear and identifiable links between the marketing service and plan(s) and the organisation's business strategy/plan.</p> <p>There is some investment in skills and modest levels of resources to</p>	<p>The organisation has completed a PESTLE and SWOT analysis to help determine its USPs, its main customers and target audiences and its brand proposition. A marketing strategy/plan has been developed with the involvement of partners and stakeholders.</p> <p>There are dedicated and specialist resources in place to implement the marketing strategy/plan.</p> <p>There is evidence of effective planning across the '7Ps'</p>	<p>The marketing strategy/plan is well established and is being embedded within the organisation. It has very clear objectives relating to its: target audiences, market development and systems, influence, profile, investment priorities and income generation opportunities.</p> <p>Data capture and analysis is well planned and provides a rationale for interventions, priorities and the setting of short and long term marketing objectives.</p> <p>Social media and insight/</p>	<p>Values based marketing principles that focus on a functional behavioural change model are enshrined in the marketing strategy/plan and its delivery, which is fully embedded within the organisation. All staff are proud to be contributing to its delivery and to be associated with its brand.</p> <p>Innovative marketing techniques and tools are being used to reach target population groups and communities. There is</p>

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		<p>implement the marketing strategy/plan.</p>	<p>including: programming, product development, pricing, promotion and partnership working.</p> <p>Target population groups and communities have been clearly identified.</p> <p>There is shared understanding amongst staff and evidence that they have been fully involved in the development processes.</p>	<p>knowledge and market research is used to help shape services and direct resources. Effective tools are being used to bring about behaviour change. Target population groups and communities are involved in the planning process and their needs are being met.</p> <p>There is growing capability amongst staff and evidence that they are contributing to the implementation of the strategy/plan.</p>	<p>evidence of the positive impact this work is having on engagement levels and lifestyle behaviours within the targeted population groups and priorities.</p> <p>There is evidence of increased brand awareness, effective two way distribution channels to both B2B and B2C marketplaces and good levels of return on investment.</p> <p>There is evidence of internal organisational development and change as a result of data and insight.</p> <p>The organisation has an excellent reputation amongst its partners and stakeholders for its communication and advocacy and there is evidence that its profile and influence is growing.</p>

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Challenge:	Unsatisfactory	Satisfactory	Good	Very Good	Excellent
<b>DO</b>					
<p><b>How is insight and market research used to inform decision making, priorities and tactical approaches to help change behaviours and attract and retain new participants?</b></p>	<p>The use of available national and local insight is limited and there is little effort made to obtain and use local market research.</p>	<p>National insight data for: disabled people, women and girls, young people, sports and the active outdoors is used internally to inform existing work and support requests for partners.</p>	<p>National data and insight for target population groups and communities is well understood and is being applied to help shape services.</p> <p>Staff have knowledge and are able to apply it to their work areas and communicate it to partners, stakeholders and front line deliverers.</p> <p>Good use is being made of local sports/health profiles, market segmentation and other local sources. Results from national surveys such as Active Lives and the National Child Weight Management Programme in primary schools are used to inform planning and help shape new service delivery.</p>	<p>Insight and data sources for inactive people, people with long term conditions, women and girls, disabled people and young people are being used proactively to change service delivery, both internally and externally.</p> <p>There is evidence of how local as well as national intelligence is being used proactively to develop new approaches and tactics to engage inactive people and support/encourage them to become active – leading to behavioural change.</p> <p>There is understanding of market gaps and needs through a thorough assessment of supply and demand in the area, that is inclusive in meeting the needs of first time participants.</p>	<p>Knowledge is well managed and applied internally to shape the structure and culture of the organisation as well as inform the development of services, messages, action planning and tactics.</p> <p>Staff are highly skilled and able to convert knowledge into action through the use of social media, digital advertising, innovation and the effective use of best practice. The effect on behaviour change can be evidenced.</p> <p>Services are designed and delivered in new ways and new markets are being reached and developed. End users, new customer groups, stakeholders and partners are involved in shaping services, products and marketing activity.</p>

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<p><b>What communication tools are used to reach target population groups and communities and to motivate partners/end consumers to become active and involved?</b></p>	<p>There is little or no communication planning or evidence of effective delivery.</p>	<p>Communication plans are in place and operating with the support of a website and making good use of social media.</p>	<p>The organisation can identify, define and communicate the benefits of services provided to partners, stakeholders and customers.</p> <p>Use of social media/digital marketing is developing rapidly and there are examples of innovation and market development.</p>	<p>There is a Customer Relationship Management (CRM) system in place.</p> <p>There are good data collection and reporting systems in place.</p> <p>Good use is being made of social media/digital marketing to inform and communicate with customers, partners, stakeholders and delivery networks.</p> <p>All communications and media work meets the standards of the EFDS Inclusive Communications guide.</p>	<p>The brand or reputation of the organisation can be seen to have been enhanced.</p> <p>There is creative and proactive use made of social media and digital marketing techniques to extend the organisation's reach and influence.</p> <p>There is evidence of effective campaigning and promotions designed to stimulate demand amongst inactive audiences.</p> <p>External communication to both business and consumer groups is highly regarded and improving.</p>
<b>MEASURE</b>					
<p><b>What marketing objectives and measures are used to drive service development and delivery?</b></p>	<p>There are no objectives or measures in place.</p>	<p>Measures are input based and are mainly focused on communication.</p>	<p>Objectives and priorities have been identified and precise measures set for the next 12 months covering: awareness/profile, income, market penetration, market development, influence.</p>	<p>Objectives are clearly set out and are being achieved.</p> <p>Measures are in place and being delivered with trend analysis undertaken and targets carefully set to achieve results in priority</p>	<p>Services/products/interventions are having an impact in key areas and with target population groups and communities. There is clear measurement of market reach, profile, influence and</p>

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				<p>areas and services.</p> <p>The organisation has clear USPs and a strong brand.</p>	<p>awareness.</p> <p>There are examples of income generation and commercial development which support sustainability and cross-subsidy of services.</p>
<b>REVIEW</b>					
<b>How does the organisation demonstrate effective practice and show a high return on investment?</b>	<p>There is no process in place to assess the return on marketing investment or review what works best/most effectively.</p>	<p>The organisation can provide limited evidence and analysis of the return on marketing investment, which is mainly through input measures.</p> <p>Internal ad hoc reviews of what works best/most effectively are undertaken.</p>	<p>The organisation has put in place a review process involving key staff and partner agencies and has identified relevant KPIs to measure and monitor.</p>	<p>The organisation has taken action to shape services and make changes as a result of structured reviews involving check and challenge processes. There is evidence of positive results emerging.</p> <p>There is a clear focus on and understanding of the customer journey/the customer experience over time.</p>	<p>The improving return on investment is clear to see in terms of market development/penetration, income generation or cost recovery, attendances/participation/activity levels and influence/awareness.</p> <p>The organisation can show what works to best effect in reaching, engaging and retaining target population groups and communities.</p>
<b>IMPACT</b>					
<b>Has the organisation improved market development</b>	<p>There is no evidence of deeper or wider market development in target audiences/communities/sports.</p>	<p>There is a focus on market penetration of existing participants/users and limited</p>	<p>The organisation can point to a number of examples where marcomms action and investment is making a</p>	<p>The organisation is able to show the difference it is making with and for partners/customer groups in</p>	<p>The organisation can show a direct link between marketing action planning and increased</p>

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<p>which has led to reduced levels of inactivity and more frequent participation?</p>		<p>evidence to date of the wider impact if interventions.</p> <p>There are positive results in projects/programmes managed or supported by the organisation.</p>	<p>difference to targeted work, business development or brand awareness. This is supported by partner testimonials and evidence.</p>	<p>a more joined up and system based approach.</p> <p>USPs are clearly well developed and driving effective interventions/ service or product development which is well regarded and valued by staff, partners and stakeholders.</p>	<p>participation/activity levels by targeted population groups and communities and customers over a sustained period of time. There are indications of a reduction in inequalities and wider access to opportunities and services provided.</p> <p>There is increasing evidence of and emphasis on a place based approach using insight and marketing led approaches to bring agencies/facility providers and communities together in pursuit of achieving health and other social benefits through reducing inactivity and increasing participation, volunteering and social interaction.</p>

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### PLAN

#### GUIDANCE

- The marketing strategy/plan gives longer term direction and identifies shorter term actions and resources. It identifies the USPs, brand proposition and balance between B2B and B2C approaches.
- There are clear identifiable links between the business strategy/plan and the marketing strategy/plan.
- Marketing tools are used to help plan as well as create focus and priorities for investment of resources such as the Ansoff Matrix and Boston Box.
- The '7Ps'- product, place, price, promotion, partnerships, process and programming have all been carefully considered when developing an integrated marketing plan which has clear marketing objectives around marketplace development and the targeting of subsidy, interventions and promotions to achieve maximum effect.
- There are clear identifiable links to customer/user data, market research and national insight/data within the business plan.
- There is a planned approach to the gathering of customer and market research which includes the active and inactive and involves the use of primary and secondary research methods.
- The marcomms plan makes clear use of local and national insight and describes the key messages to be delivered. It outlines how the organisation will reach target population groups and communities to raise awareness and engage targeted audiences in the short term to change behaviour in the long term.
- There is a clear focus on developing effective internal and external communications, articulating the key messages and targets set out in the marketing strategy/plan.
- Data capture and analysis is well planned and organised.
- The service has a strong brand which is well recognised in the field and projects/programmes have strong local identity.
- Planning promotes enterprise/innovation but identifies what works best in the interests of longer term viability and sustainability.
- There is a place based, customer centric, inclusive approach at the heart of the organisation which embraces co-production and focuses on behaviour change, the customer journey and the quality of the experience in order to attract, engage and retain those who are inactive.

### DO

#### GUIDANCE

- A wide variety of existing national, regional and local research data has been considered to guide and shape action planning including:
  - Sport England Active People/Lives Survey
  - Sport England Market Segmentation Tool and Toolkit
  - Taking Part Survey
  - Acorn/Mosaic/Experian demographic analysis
  - Census data
  - Local health and sport profiles
  - Local community surveys

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- Partner data/surveys
- Insight studies/resources provided by Sport England/Public Health England/EFDS and other agencies around young people, women and girls, disabled people, older people, BME communities, and the inactive or people with long-term health/medical conditions.
- Intelligence is used well because of the quality and reliability of the source and gathering of the data used, the depth and breadth of information provided, the robustness of the methodology and the quality of those gathering and analysing the data to make decisions.
- Data is linked to research and development functions designed to provide insight and understanding of buyer's perceptions and behaviours, and the barriers to equal opportunity; thereby gaining a better view of market developments, for example EFDS Talk to Me research/principles.
- Dedicated, specialist internal and external expertise is deployed to analyse data, shape services, design interventions and develop products that reach, engage and retain target audiences.
- Staff are fully trained and briefed on marketing techniques and tools for example, insight data and analysis, together with behaviour change/motivational interviewing/ sales and retention skills.
- Customer relationship management (CRM) systems in place to help understand the current customers/user base.
- Potential and existing partner networks have been identified and utilised to assist in delivering marketing activity. There are good examples of working in partnership with other organisations or services to provide distribution channels that assist in the delivery of the marketing activity.
- There is a clear focus on market development based on local needs assessment as well as latent demand studies. Staff have a good knowledge of local population groups and communities. Observations and knowledge of front line staff, actively involved within it on a day to day basis, is captured. Proactive community engagement is used to address inequalities and widen access to services, projects and programmes.
- The service has defined the marketing spend within the financial budget and can demonstrate that adequate and appropriate resources, such as time, finance and staff been allocated to the delivery of marketing plan and research.
- A variety of different marketing media techniques are used to deliver communications/promotional activity, such as social media, e-marketing, digital advertising, direct mail, referral campaigns, newspaper advertising, newsletters, radio, texting - with tracking and evaluation processes incorporated to assess effectiveness.
- Processes and procedures have been developed to ensure that all forms of media advertising and promotion, including the use of social media, are monitored in terms of effectiveness to determine future decisions
- Tactics and actions cover both strategic communications as well as delivery and there is clear evidence of structured, timely and targeted communications in operation, designed to raise the profile of sport/physical activity and the service/organisation as a whole to key stakeholders/decision makers/commissioners.

### MEASURE

### GUIDANCE

- The service measures its performance against the objectives in the marketing strategy/plan and cover market development/penetration, general activity/attendance/occupancy levels, profile/influence and income generation/financial sustainability as appropriate.
- The service measures its impact on end users and outcomes - specifically around increasing the number of people who are active and stay active.



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- Objectives, priorities, measures and targets are well articulated and understood both internally and externally.
- The service has Key Performance Indicators (KPIs) and targets that are used to measure the return on investment in insight and marketing activity.
- The service can measure achievement of its communication/information work through 'Google Analytic Reports', 'Search Engine Optimisation' and 'Social Media Metrics'.
- PR activity is measured and is given an economic value.
- There are improving indicators to assess the return on investment for the business/service.

### REVIEW

#### GUIDANCE

- Regular reviews of the marketing strategy/plan alongside the business strategy/plan are undertaken to monitor progress and achievement.
- Key staff and partner agencies review marketing objectives and activities against targets to identify improvements and make changes (do more of what works best).
- The service conducts regular reviews of the findings from research and analysis to influence the marketing strategy/plan and identify improvements/developments to the service so there is evidence that data is turned into knowledge/intelligence which in turn informs action planning and service development.
- Staff and stakeholders are encouraged to come forward with new ideas/innovations that could improve service development, improve the user experience and/or improve the efficiency and effectiveness of the supply chain.
- Research is carried out to ascertain the value and success of specific interventions on lifestyle change as a result of marketing, campaigning and communications.
- There is proactive benchmarking around best practice both inside and outside the sector/industry.
- Impact on both equality and inclusion can be clearly demonstrated.

### IMPACT

#### GUIDANCE

- The service can demonstrate that the organisational purpose and specific KPIs/targets are being achieved as a result of the marketing activity.
- Usage/participation/activity is increasing amongst the audiences specifically targeted (population groups and communities).
- There is clear evidence of market development and not just more market penetration in the already active or engaged.
- The service can demonstrate financial improvements year on year providing long term sustainability and/or a good rate of return on the investment made.
- There is evidence that the use of insight data and the consequent marketing and communications action is making a contribution to national/local outcomes being achieved.
- The service has increased its media and PR coverage, such as local newspaper editorial, and coverage across radio, television and national journals.
- The service can demonstrate that its website, social media, PR and media work meets the EFDS inclusive communications guidance.

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- The service has increased its social media followers, including Facebook and Twitter as well as its profile/influence.
- Impact reports and infographics are produced and are creating more awareness/profile and influence amongst end users and key commissioners/decision makers.
- Evidence that a values based approach to behavioural change (e.g. EFDS talk to me principles) is effective.