

Overview

This unit is about engaging with individuals, communities and organisations to influence their behaviour. Clearly, even if rigorous research has been carried out, it is impossible to predict fully the results of engaging with people; engagement activities need to remain flexible and responsive to emerging results. It should not be expected, therefore, that the performance standards will necessarily be carried out in a chronological order; indeed it is anticipated that there will be many iterative loops before objectives are achieved.

This unit is for people in operational or managerial roles who engage directly and/or indirectly with individuals, communities and organisations to influence their behaviour as part of a planned social marketing programme.

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Performance criteria

You must be able to:

- P1 develop a clear understanding of the objectives of the social marketing programme and how engagement with the target groups is expected to complement other activities in contributing to these objectives
- P2 carry out a thorough assessment of the needs of the target groups in order that they can participate effectively
- P3 identify and resolve with key stakeholders any ethical issues regarding engagement with the target groups
- P4 identify any risks to engagement with the target groups and determine how these risks are to be managed
- P5 identify existing or innovative methods, tools and techniques and evaluate their suitability and reliability for engaging with the target groups
- P6 use suitable, reliable and cost-effective methods to engage with the target groups that are sensitive to their particular needs
- P7 show your commitment to a sustained relationship with the target groups by taking time to build trust and empathy with them
- P8 enable discussions to take place between the target groups, partners and other key stakeholders to promote mutual understanding of each others' perspectives, develop consensus and foster shared responsibility for achieving common purpose(s)
- P9 evaluate the research evidence and engage with the target groups to develop insight into, and understanding of, the range and relative importance of different influences on their behaviour
- P10 encourage and support the target groups to participate in the design, development and testing of social marketing programmes
- P11 use appropriate channels to engage with the target groups to influence their behaviour; these may include:
 - P11.1 direct communication through informal conversations, structured discussions, specially-organised events or participation in the target groups' own events
 - P11.2 indirect communication via credible intermediaries such as: peers, champions, community leaders, professional advisers, experts, celebrities etc
 - P11.3 social networking through traditional communities and/or virtual networks
- P12 keep colleagues and other key stakeholders appropriately informed about engagement activities and their outcomes
- P13 monitor engagement activities with the target groups and take prompt action:
 - P13.1 if engagement activities are not making their expected

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contribution to achievement of the objectives of the social marketing programme,

P13.2 in response to identified risks materialising, or

P13.3 in response to emerging opportunities or threats

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Knowledge and understanding

You need to know and understand:

General Knowledge and Understanding

- K1 communication principles, methods, tools and techniques
- K2 consultation principles, methods, tools and techniques
- K3 creative-thinking principles, methods, tools and techniques
- K4 decision-making principles, methods, tools and techniques
- K5 duty of care towards target groups
- K6 evaluation principles, methods, tools and techniques
- K7 examples of effective and ineffective social marketing practice relevant to the activity
- K8 influencing principles, methods, tools and techniques
- K9 leadership principles, methods, styles and techniques
- K10 legal and organisational/partnership requirements relevant to social marketing
- K11 monitoring principles, methods, tools and techniques
- K12 motivation principles, methods, tools and techniques
- K13 objective setting principles, methods, tools and techniques
- K14 partnership working principles, methods, tools and techniques
- K15 principles, methods, tools and techniques for addressing ethical issues
- K16 principles, methods, tools and techniques for engaging effectively with target groups and stakeholders, including vulnerable and hard-to-reach groups
- K17 research findings relevant to the activity
- K18 risk management principles, methods, tools and techniques
- K19 social marketing principles, methods, tools and techniques
- K20 support principles, methods, tools and techniques

Industry/Sector Specific Knowledge & Understanding

- K21 industry/sector, organisational/partnership and professional codes of practice
- K22 legal, regulatory and ethical requirements in the industry/sector

Context Specific Knowledge & Understanding

- K23 current and future roles and responsibilities in the organisation/partnership
- K24 organisational/partnership policies and procedures relevant to the activity
- K25 organisational/partnership resources
- K26 organisational/partnership vision, mission and strategic objectives
- K27 stakeholders and their diverse interests, needs, abilities and preferences
- K28 target groups, their diverse interests, needs, abilities and preferences

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K29 your own role and responsibilities

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Additional Information

Behaviours

1. generate and recognise imaginative and innovative solutions
2. identify people's information needs and preferred communication media and styles
3. listen actively, ask questions, clarify points and rephrase others' statements to check mutual
4. present information clearly, concisely, accurately and in ways that promote understanding
5. keep people informed of plans and developments
6. show empathy with others' needs, feeling and motivations and take an active interest in their concerns
7. show respect for the views and action of others
8. encourage and support others to make the best use of their abilities
9. identify and raise ethical concerns
10. accurately calculate risks, and make provision so that unexpected events do not impede the achievement of objectives
11. keep confidential information secure
12. seek to understand people's needs and motivations
13. show your commitment to a sustained relationship by taking time to build trust
14. show sensitivity to the needs and interests of all parties involved, and manage these effectively
15. encourage others to contribute ideas and to reach a consensus

Glossary

As used in the standards, "social marketing programme" encompasses longer-term (3 years) programmes, medium-term (1-3 years) campaigns and short-term (<1 year) targeted initiatives

Stakeholders

These include all those involved in, or affected by, the social marketing strategy and the issues it is seeking to address

Key stakeholders

These are those with the greatest interest in or influence on the issues; they will always include the target groups or intended beneficiaries of the social marketing activity

Risk

This means the chances of an event happening and the seriousness of the consequences of that event. **Risk** does not of itself have a negative connotation; there can be both positive and negative consequences of an event. One of the key risks in carrying out a test marketing activity is that the

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results become contaminated by changes in other environmental factors

Risk management

This includes: assessing the risks; taking action to avoid events that have negative consequences; planning to minimise the negative consequences and maximise the opportunities if events do occur

It is recognised that social marketing programmes usually involve a number of "partner" organisations working together in close collaboration.

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Developed by	CFA Business Skills @ Work
Version number	1
Date approved	March 2009
Indicative review date	March 2011
Validity	Current
Status	Original
Originating organisation	Chartered Institute of Marketing
Original URN	[ORIGINURN]
Relevant occupations	Arts, Media and Publishing; Health, Public Services and Care; Health and Social Care; Public Services; Animal care and veterinary science; Environmental conservation; Retail and commercial enterprise; Performing Arts; History, philosophy and theology; Sociology and social policy; Education and training; Accounting and finance; Business management; Marketing and sales; Health and Social Services Officers; Health Professionals; Teaching Professionals; Health Associate Professionals; Protective Service Occupations; Government and Related Organisations; Finance; Communications; General; Personal Service Occupations; Sales and Customer Services Occupations; Business and Finance Associate Professionals
Suite	Social Marketing
Key words	behaviour; social marketing behaviour; influence behaviour