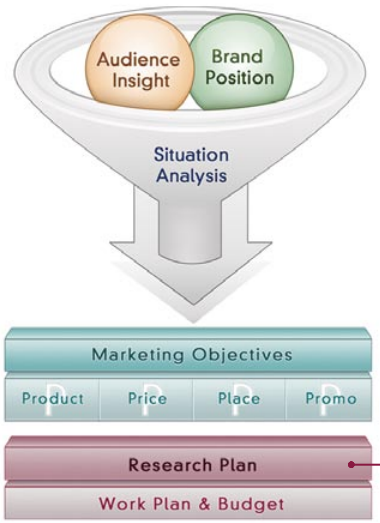
Where are we now?



Research Plan

Summary

Research planning is the process through which marketers and researchers work together to identify the research studies necessary for each step in the social marketing process.

The research planning process has three steps:

1. Create an indicator table
2. Add information gaps to the indicator list
3. Work with Research to determine necessary studies

There are three types of data that research studies collect:

1. Monitoring Data
2. Evaluation Data
3. Other program-related information

Where are we now?

Research planning is the process through which marketers and researchers work together to identify the research studies necessary for each step in the social marketing process.

- PSI uses research to inform every step of the process from strategic planning through to project evaluation, by providing the data upon which decisions are made.
- Consider your research team to be as much a part of your marketing team as other departments like sales, IPC or communications.
- It is critical that both teams work closely together via regular face-to-face meetings. PSI experience has shown that managing this process by email alone does not work.
- The marketer's role in this process is to…
  - » identify and prioritize information gaps that need to be filled, and
  - » specify the indicators that need to be measured.
- The researcher's role is to fill the information gaps and measure the indicators.

An indicator is something you measure in order to monitor the progress of the project, e.g., percent of the target group who perform the promoted behavior or who have high knowledge about the health problem.

The research planning process has three steps:

❶ Create an indicator table

This is an exhaustive list of all the project's indicators in a single table. This will help your researchers develop their study design. It should include...

- logframe indicators,
- other donor driven indicators, and
- any indicators identified by program managers as useful for project management (e.g. behavioral determinants identified in the previous TRaC; exposure measures).

Be sure to…

- include the timing against which the indicator needs to be measured, e.g., annually or before campaign launch;
- specify how the indicator is to be measured (e.g. use last night vs. consistent use in the last 3 months); and
- work with the research department to determine exactly how each question in the TRaC should be worded in order to measure the indicator properly.

Project/Target: Hormonal Contraceptives for Women 15-35 Years

Indicator/Information Gap	Main Reason for Inclusion	Timing	Study
% of target who report consistent use of hormonal contraception in the last 6 months	Logframe purpose level indicator	Every 2 years	TRaC
% of target who report high self efficacy for discussing contraceptives with a regular partner	Behavioral determinant from baseline TRaC	Every 2 years	TRaC
% of target audience reporting exposure to radio campaign	To identify the efficiency of radio as a communication tool, to determine if campaign is meeting reach target	Immediately after launch of campaign	TRaC-M (or TRaC)
What media can be used to reach the target?	To inform communication plan	Once off – by end Q3	TRaC (or a FoQus study)
Why does the target have such a strong external locus of control?	To inform campaign message development	Once off – by end Q3	FoQus for Marketing Planning or Qualitative Segmentation
What is the level of coverage and quality of coverage of hormonal contraception in the project area?	To inform sales and distribution plan	Every 2 years	MAP

The research planning process has three steps, continued...

❷ Add information gaps to the indicator list

As discussed earlier, all throughout the marketing planning process you should keep a running list of information gaps – things you need to know about your target group. Now is the time to finalize that list.

Items on this list can include...

- any unanswered questions from the situation analysis of the marketing plan;
- anything missing from the audience profile that will improve program planning; and
- new insights or hypotheses about the target audience that you want to explore.

The gaps should be listed as questions that either qualitative or quantitative research could answer.

❸ Work with Research to determine necessary studies

Many of the indicators and information gaps can be measured/filled with the same study.

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WARNING!

It is critical that we only conduct research for things we absolutely must know and not for things that are 'nice to know'. Before a study begins, we should understand exactly what type of marketing decisions we will make based upon its results. To this end, we must prioritize what research questions need answering based upon our hypothesis of what we believe the situation to be. We should not think of research as a process that gives us answers, but rather as a way of gaining insight.

There are three types of data that research studies collect.

1 Monitoring Data

Monitoring data includes baseline data (for a new intervention) and trend data over two or more surveys (for an ongoing intervention). It is used to measure these types of data:

Type of Data	Example	Corresponding Logframe Level	Study That Can Collect This Data
Behavior Information	% of households who consistently treated their water in the last three months	Purpose Level	• TRaC
Determinant Information	% of target who feels confident they can talk to their partner about using condoms (Self Efficacy)	Output Level	• TRaC
Activity or Process-related Information	• Number of clients who received VCT • % of target group that was exposed to PSI's media campaign	Activity Level	• TRaC, • Management Information Systems (MIS), • TRaC-M

This is like an abbreviated TRaC – much shorter and quicker to conduct. It is used only to monitor activity level indicators.

Often, the Research Department doesn't manage this. Nonetheless, include it in your data analysis activities.

2 Evaluation Data

- Collected midway through and/or at the end of an intervention as part of a TRaC survey.
- Includes data on exposure to the intervention as well as behavior and determinant indicators. This is then compared to the baseline data collected in the previous survey.
- The purpose of evaluation data is to assess whether exposure to the PSI intervention has resulted in any change in behavior or determinant indicators.

3 Other program-related information

- During the situation analysis and development of the audience profile, you may have realized that you lack some critical information, e.g.…

? What are typical life aspirations of my target group?

? What are the typical trade margins for my product?

Your research department will use this chart to complete…

- their section of the work plan that is created for this marketing plan (See next section Workplans and Budgets);
- their annual research plan, which is a document they must submit to the regional researcher, health area PI's, and PSI Washington that specifies all the research studies that are to be conducted at a given platform for all health areas and the timing.

Be sure to allow enough time for your research. Population based study designs must be approved by…
- your Regional Researcher;
- your health area principal investigator (PI);
- PSI's internal ethical review board; and sometimes also
- a local ethics board.

This can take anywhere from three to six or even 12 months – especially if it is a national survey and the local Ministry of Health is involved.