



iSMA Social Marketing Standards 2024

This paper sets out the iSMA professional Social Marketing Standards. The standards are set out under what the working group have identified as the six key knowledge and skill function areas required for effective , efficient, and ethical Social Marketing Practice.

- 1 Setting of explicit knowledge belief and behavioural goals
- 2 Problem identification critical thinking and reflexivity
- 3 Theory, insight, data and evidence informed segmentation
- 4 People orientation
- 5 Competition and asset analysis
- 6 Deliver value-based exchange through a mix of behavioural influence

These standards will be updated on an ongoing basis with the next full revision taking place by the end of 2027. iSMA wishes to thank and acknowledge the work of all those who contributed to this first set of standards of practice in Social Marketing. iSMA and its affiliated associations are especially grateful to the work of the committee members listed below and the leadership of Professor Sharyn Rundle-Thiele chair of the iSMA Standard setting Committee.



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These standards can be used to develop course curricular, quality assurance processes, job descriptions, personal development plans, assess competency and knowledge and review both individual and organisational Social Marketing practice.

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A full copy of the standards development process can be found at the iSMA website. [Statements - International Social Marketing Association \(iSMA\) \(isocialmarketing.org\)](http://www.isma.org)

Setting of explicit knowledge, belief and behavioural goals		
Key functions	Core knowledge and skills required:	Performance criteria – evidence provided either from documentation or assessment during work or study of social marketer's ability to:
<p>1 Outline the pathway to impact, which involves describing how activities and outputs achieve intended outcomes and where practical lasting impact can be made</p> <p>2 Discuss and agree on the program aims and specific objectives with stakeholders and partners</p> <p>3 Set and differentiate between knowledge goals, belief goals and behavioural goals</p> <p>4 Identify explicit metrics that facilitate the ongoing measurement, evaluation, and further improvements of solutions being implemented</p>	<p>Knowledge</p> <ul style="list-style-type: none"> - Theory of change including clear understanding of inputs, activities, outputs, outcomes and impact - Cost benefit processes - Outcome and impact assessments, e.g. SROI - Stakeholder processes to identify shared goals - Brand, service or product management processes - Governance structures - Difference between behaviour and behaviour influence - Knowledge on how to design, deliver and evaluate social marketing programs - Performance benchmarking - Measurement of process efficiency and quality issues <p>Skills</p> <ul style="list-style-type: none"> - Leadership - Supervise, train/upskill students, co-workers and/or partners (incl. coaching skills and mentoring) - Staff management - Monitoring and evaluation planning and application - Reporting 	<p>a. Outline how different activities and outputs can lead the way to potential solutions creating lasting impact</p> <p>b. Identify the range of community stakeholders and devise ways through which their support and participation is engaged in identifying the specific objectives or the potential solution</p> <p>c. Apply data, research, evidence, and behavioural theory to develop, implement and evaluate programs of work</p>



Problem identification, critical thinking, and reflexivity		
Key functions	Core knowledge and skills required:	Performance criteria – evidence provided either from documentation or assessment during work or study of social marketer's ability to:
<p>1 Identify the problem with partners and stakeholders</p> <p>2 Understand and apply ethical principles using the Ethics Code of Social Marketing Practice</p> <p>3 Establish objectives and apply social marketing principles to create cost-effective, sustainable solutions that work for community and stakeholders</p> <p>4 Gather evidence to understand what is currently happening in the system and what the social, cultural, economic, and behavioural dynamics surrounding individual community members are</p> <p>5 Map systems including identification of actors and assets within the system, barriers and enabling factors</p> <p>6 Establish strategies, action plans and a monitoring system to track performance aiming to meet or exceed performance benchmarks</p> <p>7 Continuously reflect on the program during the development process upon implementation</p>	<p>Knowledge</p> <ul style="list-style-type: none"> - Identify and apply tools capable of building an understanding of wicked social problems (incl. design thinking, including root cause analysis, how might we tools) - Participatory design tools including Living Lab, co-design etc. - Evidence review processes - Systems thinking, including systems mapping, analysis, and solution processes - Stakeholder identification processes - Stakeholder management processes (form and maintain stakeholder partnerships) - Utilise appropriate approaches to engage locals - Action planning - Evaluation and monitoring - Feedback processes, including 360 review processes - Impact assessments - Strategic upstream interventions <p>Skills</p> <ul style="list-style-type: none"> - Communication (incl. local language skills) - Critical thinking - Reflexivity - Project Management - Administer research and project activities - Engagement with community partners - Participatory design facilitation - Consensus identification and reaching a shared path forward - Creation of context specific dictionary with community stakeholders to ensure all parties agree on the meaning of specific words and phrases - Self-reflection, open and receptive constructive criticism - Ethics, moral and values aligned with organisation 	<p>a. Identify the range of community stakeholders in a specified area or setting and devise ways through which their support and participation is engaged in identifying the problem</p> <p>b. Select appropriate methods for addressing the problem and show how the methods applied have led to behaviour or system changes that enable the selected behaviour</p> <p>c. Critically assess research literature and use evidence in planning and implementation of behaviour change action</p> <p>d. Ensure community and stakeholder engagement is maximised, e.g. MATE taxonomy</p> <p>e. Include outcome and impact reporting focussed on identifying successes and areas for further improvement</p>



Theory, insight, data, and evidence informed segmentation		
Key functions	Core knowledge and skills required:	Performance criteria – evidence provided either from documentation or assessment during work or study of social marketer's ability to:
<p>1 Set the focal behaviour or solution</p> <p>2 Select and apply appropriate theory known to influence the selected behaviour (e.g., exchange theory, COM-B, SCT, SEM, TPB and more)</p> <p>3 Analyse epidemiological service usage data and purchasing data</p> <p>4 Perform dynamic targeting to be able to identify and prioritise valid groups that are actionable, substantial, and accessible or ability to identify experts who can perform segmentation</p> <p>5 Develop personas to describe the demographic, geographic, psychographic (attitudes, beliefs, social and built environment factors) and current behaviours, and establish programs for each target persona group</p> <p>6 Deliver strategies, action plans and a monitoring system at a segment level</p>	<p>Knowledge</p> <ul style="list-style-type: none"> - Behaviour selection processes, e.g. Step 1 in CBSM - PRISMA for systematic literature reviews - Search term specification for SLRs - Social marketing theories - Network theory (typically used with influencers) - Psychology of behaviour change - Theory selection processes, e.g. SMT - Theory integrating processes, e.g. abductive techniques - Theory application processes, e.g. BUILD or TITE - Segmentation processes - Persona development processes - Consumer research techniques (e.g. social listening, surveys, interviews, environmental audits, observation, focus groups, big data, anthropology, cultural studies, ethnography) - Systems to manage interactions with stakeholders and partners <p>Skills</p> <ul style="list-style-type: none"> - Ability to identify the appropriate research design - Ability to select optimal theory - Ability to apply theory in co-design - Ability to map theory and practice - Ability to evaluate performance using theory - Research skills to test alternate theories to identify optimal theory - Survey building including selecting appropriate scales and constructs - Ability to identify groups within communities and deliver group-level insight - Quantitative data analysis skills, e.g. regression, structural equation modelling, mixed level modelling, cluster analysis - Qualitative data analysis skills e.g. thematic analysis, content analysis 	<p>a. Identify potential solutions and apply appropriate theory that relates to the different aspects of the behaviour</p> <p>b. Source subject matter experts to support the progress of the program development</p> <p>c. Identify and prioritise different target groups based on the insights found from the data</p> <p>d. Utilise the insights to develop targeted programs or solutions that resonate with the different segments</p> <p>e. Evaluate the effectiveness of the solutions to ensure uptake</p> <p>f. Use evaluation insights to re-evaluate the priority of the target groups and to improve program delivery to the highest priority groups</p>



People orientation		
Key functions	Core knowledge and skills required:	Performance criteria – evidence provided either from documentation or assessment during work or study of social marketer's ability to:
<p>1 Engage community and stakeholders in problem definition</p> <p>2 Develop, meaningfully engage, and maintain working relationships with stakeholders and partners including diverse community groups</p> <p>3 Ability to use existing community mechanisms and people-centred approaches to access different groups and ensure community reach and engagement is maximised during the entire process</p> <p>4 Apply research and testing principles, including participatory design methods that build understanding of and maximise engagement with community members and stakeholders</p> <p>5 Apply systems methodologies ensuring community representation in all work</p> <p>6 Deliver value-based exchange by increasing the perceived benefits and decreasing the perceived costs of desired behaviour</p> <p>7 Work with and support community members, stakeholders and partners</p>	<p>Knowledge</p> <ul style="list-style-type: none"> - Stakeholder engagement processes - Evaluation of engagement processes - Community engagement frameworks (e.g. MATE) - Community development - Participatory research methods including co-design, design thinking, Living Lab - Marketing and behaviour change frameworks, e.g. Community Based Social Marketing, CBE (Co-create – Build - Engage), EAST - Social marketing benchmark criteria including behaviour change, theory, consumer orientation, segmentation, insight - Value-based exchange - Participant screening/assessment - Inclusive practice - Context specific knowledge - Researcher bias and systematic analysis of biases and influences - Different levels of regulation - Governance structures <p>Skills</p> <ul style="list-style-type: none"> - Ability to ensure appropriate representation of diverse communities such as cultures, genders, sexualities, bodies, abilities, spiritualities, ages and backgrounds - Ability to immerse into local understanding, cultural practices, social networks etc. - Facilitation of participatory research methods such as co-design, design thinking, Living Lab - Ability to perform policy analysis (incl. interviewing policymakers) - Understanding and mediation of differing views <p>Inter-personal skills for a social marketer:</p> <ul style="list-style-type: none"> - Strategic skills (incl. troubleshoot, problem solving, see big picture, sound judgements) - Proactive, resourceful and results-oriented - Ability to work in a challenging and stressful environment with unexpected challenges - Collaboration competencies and team player - Attention to detail and flexible/mode (field work/travel) 	<p>a. Apply stakeholder identification processes that deliver maximum diversity</p> <p>b. Apply methods that maximise community and stakeholder engagement, and ensure community contribution</p> <p>c. Apply partnerships that extend reach, engagement and impact</p> <p>d. Utilise participatory design approaches</p> <p>e. Deliver consensus approaches that ensure solutions reflect community voices that are supported by stakeholders</p>

Competition and asset analysis		
Key functions	Core knowledge and skills required:	Performance criteria – evidence provided either from documentation or assessment during work or study of social marketer’s ability to:
<p>1 Scope the assets that already exist in the wider community of interest</p> <p>2 Identify strategies and understand dynamics linked to intended behaviour change outcomes</p> <p>3 Identify and understand direct, potential and indirect competitors that can become a threat or a benefit in the future</p> <p>3 Identify and maintain collaborations or partnerships with other organisations, sectors, professionals, and communities to address identified social challenges and competition</p> <p>4 Develop competitor strategy with partners, stakeholders and communities</p>	<p>Knowledge</p> <ul style="list-style-type: none"> - Range of methods to assess strengths and weaknesses of current services, interventions and policy - Scoping processes (incl. assets mapping) - Developing competitor analysis - Competitor assessment approaches e.g. SWOT Analysis - Critical social marketing - Potential internal programs with competing interests - Complimentary, adjacent and competitive systems - Value analysis <p>Skills</p> <ul style="list-style-type: none"> - Competitive audit (secondary data analysis, Porters competitive forces) - Ability to identify niches that serve the market - Ability to write a scoping report - Ability to distinguish between the various forms of competition (incl. horizontal and vertical competition) - Ability to manage tension and conflict of interest (e.g. during organisational or cultural clashes) 	<p>a. Perform competition analysis to identify what programs already exist</p> <p>b. Engage with the community stakeholders to identify potential project partners</p> <p>c. Apply processes to ensure everyone agrees on shared goals</p> <p>d. Indicate how different interests in a partnership or network are identified and acted upon</p> <p>e. Demonstrate own role in mediating between stakeholders</p> <p>f. Identify, select, and use appropriate strategies that leverage from existing community resources</p>



Deliver value-based exchanges through a mix of behaviour influence activities		
Key functions	Core knowledge and skills required:	Performance criteria – evidence provided either from documentation or assessment during work or study of social marketer's ability to:
<p>1 Plan, implement and analyse a mix of behaviour influence activities</p> <p>2 Identify, develop, test and select intervention mix components that deliver value for individuals communities</p> <p>3 Raise awareness for available solutions (e.g. products, services and systems)</p> <p>4 Use evidence base to deliver authentic communication. Talk to, listen, learn from, and respond to community stakeholders, build trust by working with communities, engaging and empowering them</p> <p>5 Maximise trial and repeat active engagement with the solution</p>	<p>Knowledge</p> <ul style="list-style-type: none"> - Pilot program development and effectiveness evaluation - Understanding the services dimension of social marketing - Marketing planning - Distribution and pricing strategies - Event planning - Product and service development - Media optimisation, including SEO, content briefs and content planning - Communication and engagement models, e.g. AIDA, ATR, Hierarchy of Effects, Multi-actor stakeholder engagement framework - Communication planning ensuring an integrative approach - Brand management (incl. brand strategy and visibility) - Understand best practice communication guidelines - Structuration (incl. finding the middle ground) - Access delivery (physical, mental and psychological) - Scenario planning - Product, service, policy and systems development and implementation <p>Skills</p> <ul style="list-style-type: none"> - Ability to deliver insightful, new solutions - Ability to build a pilot program and evaluate its effectiveness - Ability to develop and implement a social branding strategy - Keyword research, keyword mapping & knowledge base content - Forecasting and budgeting skills - Ensure key messages align with relevant guidelines and policies - Networking skills - Strong verbal and written communication skills - Ability to provide constructive feedback - Crisis communication management including contentious issues online - Communication, verbal and written skills (incl. content writing, transcribing, storytelling, case study, creative writing, negotiation) - Media skills (e.g. PR, press releases, radio interviews) - Volunteer management - Ability to be flexible, agile and reflective - Ability to cooperate - Ability to budget 	<p>a. Utilise the insights to build a program or solution that resonates with the target audience</p> <p>b. Maximise awareness, understanding, reach and engagement with potential solutions</p> <p>c. Use a range of communication skills backed by evidence for behaviour change action, including written, verbal, non-verbal, listening, presentation and groupwork facilitation skills</p> <p>d. Facilitate long-term engagement with the behaviour change program or solution</p>