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From Cause  
to Change

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Michael Briggs*

The Red Papers:

Ogilvy



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From Cause  
to Change: The  
business of behavior

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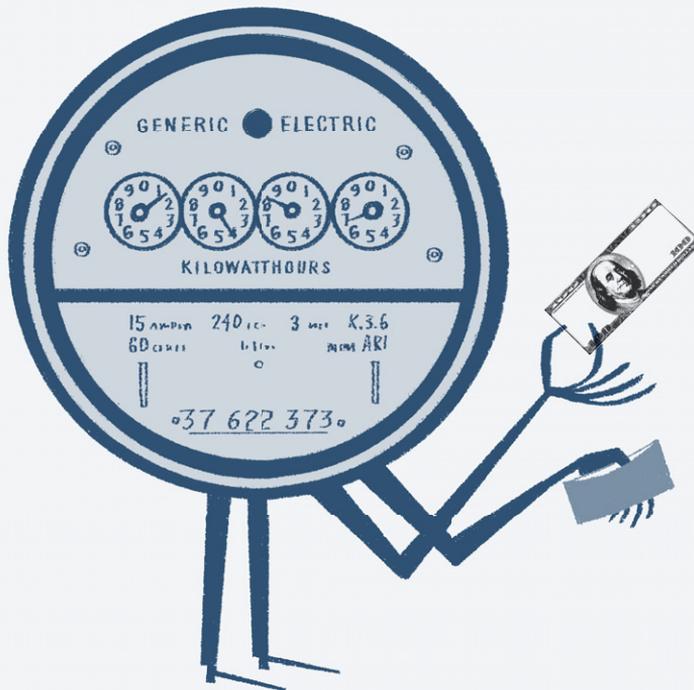
# *Introduction*

*Like many utilities, Puget Sound Energy (PSE) in Washington State actively engages in environmentally responsible operations. Their long-term planning has long recognized the business imperative of securing reliable and cost-effective energy resources. To that end, the company embraces renewables as part of its sourcing strategy, sells excess generation to utilities with higher demand, and has “greened” many service centers and the corporate headquarters.*

*PSE wants to create significant and lasting social and environmental impacts. But, make no mistake, the company is keenly aware of the business performance advantages to be gained from greater energy efficiency. And it knows that accomplishing this is dependent on more than just demonstrating or exemplifying responsible corporate behavior. That’s why the company also engages customers in an active partnership to create energy savings.*

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It is a collaboration that goes well beyond educating customers and other stakeholders about responsible energy use or creating awareness around global energy challenges. The company’s ambitious “Re-Energize” program encourages *new behaviors* in residential energy use by providing specific incentives and customer tools like rebates and home energy calculators. These tools, and the communications around them, prompt energy customers to take particular intentional actions, reinforce cost benefits, and support ongoing lifestyle changes that reduce energy use.



Through this program, PSE says it has helped customers conserve “more than 2 billion kilowatt-hours of electricity – enough ongoing savings to serve nearly 175,000 households.” Re-Energize participants enjoy direct cost-savings, and society benefits from the conservation of critical resources. But PSE wins as well. PSE doesn’t have to invest in costly new power plants because it is meeting the reduced customer demand brought about by changed behaviors. This efficiency maximizes PSE’s performance.

PSE’s initiative results from the intersection of two important imperatives. Leadership around critical social issues (in this case responsible energy use) has become a corporate asset central to business success, embedded in the DNA of company operations. But companies have realized that path-breaking is not enough. They must also cultivate and support stakeholder action – among consumers or other relevant audiences – in order to ensure optimal business yields and maximize the greater benefit to society.

Corporate leadership in social issues has grown considerably in the last decade, spurred on in part by the global U.N. Millennium Development Goals. Companies like PSE have embraced corporate responsibility roles that go well beyond their own fences, recognizing that the underpinnings for the security and prosperity of their enterprises depend on addressing the issues that impact the well-being and welfare of their communities. Companies are following Michael Porter and Mark Kramer’s pioneering concept of shared value creation, a principle that advocates “creating economic value in a way that *also* creates value for society by addressing its needs and challenges.”

For PSE, it’s not just about operating a responsible business *in* the Puget Sound community, doing good in isolation. Rather they want to be a company that’s *of* the community – innovating and providing leadership around energy solutions that benefit the citizenry and doing so in a way that boosts the company’s competitive stance and commercial success.

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Of course other factors are at work, but a driving force behind PSE's success is its active involvement of consumers in energy conservation programs and activities. As it seeks to marry purpose and profit, PSE facilitates consumer behavior change and creates a two-way dialogue that leads to richer relationships and much better outcomes.

Purpose-driven profit has largely been the focus of corporate social responsibility (CSR) and sustainability programs for some time, but PSE has seized a new opportunity: the harnessing of the power of *behavior change* to grow bottom lines and improve the connection with the priority audiences which are critical to achieving performance, sustainability, and social responsibility goals. This is an avenue that can increase demand, boost sales, reduce costs, and increase the impact of existing social responsibility initiatives and commitments.

While movements to educate or drive awareness about social issues are vital, affecting the components of personal behavior – our attitudes, our motivations, our abilities, and more – can push people toward actions that matter: the routine purchase of socially responsible goods and products or the use of or engagement with socially conscious services. Actions like those – and hundreds of others – lead our world toward better results for individuals, society, and business.

*While movements to educate or drive awareness about social issues are vital, affecting the components of personal behavior — our attitudes, our motivations, our abilities, and more — can move people toward actions that matter.*

*Businesses as agents of change*

*In today's world, people may think that influencing public behavior change movements in support of socially desirable outcomes is the distinct purview of governments or nonprofits. They are seen as experts with the right sort of authority and credibility. However the private sector also has played a significant role in advancing social progress over the decades. In fact, facilitating behavior change is in many ways an outgrowth of other socially responsible practices where businesses have made enormous contributions.*

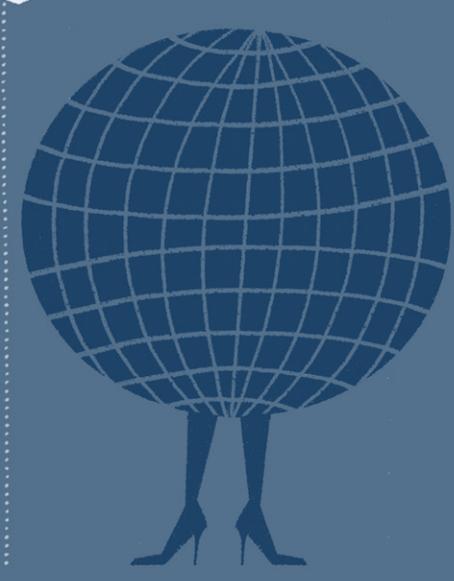
*At the turn of the twentieth century, company towns like Hershey, Pennsylvania or Corning, New York were born of recognition that investing in improved social conditions resulted in improved worker well-being, production, and ultimately profit. Years later, social movements to address pollution, health epidemics, contaminated water streams, and more, pointed fingers at manufacturers. In response, companies gradually evolved from reactive mitigation responses to proactive citizenship and philanthropy efforts.*

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of change*

They sought to identify ways in which they could support social and environmental issues that the citizenry cared about. They wisely sought to become part of the answer to, not the cause of, the problems being addressed.

This kind of private sector engagement in the common good is fundamental. As business objectives and market opportunities are aligned with efforts to improve human progress, there is a transformation underway that is reinventing companies across industry sectors. The private sector has become the incubator of innovation and the solutions provider for social problems of great magnitude. Corporations are the ones providing answers for desalinating water and for capturing harmful carbon emissions. They are sponsoring massive funding initiatives for HIV/AIDS, breast cancer, and other disease research. And even though it is controversial in some circles, the world's commercial enterprises see the urgent need to genetically modify food crops for greater nutritional benefit and higher yield.

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But despite expanded roles that speak to broader corporate responsibility and engagement with world challenges and social issues, despite reputation-enhancing programs and campaigns, despite expanded product lines that specifically meet the needs of our changing world, something still is not happening: Companies are changing, but often the stakeholders they are ostensibly changing *for*, are not.

In April 2011, for example, OgilvyEarth™ published *Mainstream Green*, in which they noted a gap in mainstream consumer engagement in the green movement despite the steady drumbeat of information and attention from high-profile supporters across the strata of business, celebrity, and science. Although consumers have been called upon to recognize the importance of a myriad of green actions, society has been “unable to convert this belief fully into action.” And indeed the new call to action for this movement, as OgilvyEarth notes, is to “shift our attention to identifying the behaviors with the greatest potential impact and to understanding the best ways to get consumers to embrace them.”

Early employee wellness efforts, designed to reduce corporate health care costs, also failed to yield desired outcomes largely because, as noted in *Corporate Wellness Magazine*, “few employers took steps to create a corporate culture of wellness so that employees looking to make healthy lifestyle changes would feel empowered, encouraged and supported on a daily basis.” It wasn’t until office practices were revamped – the creation of no-smoking zones or the addition of behavior rewards – that results followed. For example, among its many incentives, the grocery chain Safeway buys employees lunch for every eight visits they make to the gym. In 2006, the company reported reductions in health care spending of 13%. That’s worth a lot more than the cost of a free lunch.

Companies do not get the full value from their socially responsible initiatives when they focus on showcasing what *a company* believes in or what actions *a company* has taken. It’s a one-way dialogue instead of the two-way exchange adopted by PSE. And it stops short of fully engaging consumers and other stakeholders as partners in change. When a company changes its manufacturing operations to be less resource-intensive or modifies how it packages products to use more renewable

material, few of these activities create a groundswell that will excite or induce *a movement of people* to take similar steps needed to create market demand or impact. You can't inspire change by example alone.

Change comes when you engage people in something.

Deeper engagement is not unwelcome. In fact, it is increasingly what people want. In 2009, *Time* magazine's Richard Stengel reported on a poll that showed evidence of "a changing mind-set, a new kind of social contract among consumers, business and government" and noted "the rise of the citizen consumer – and the beginnings of a responsibility revolution." The private sector is uniquely positioned to be a leader of this next civic revolution. Corporations can and should use their resources and reach to support *individuals* to take actions that improve their well-being and that of their communities. Doing so will improve the lives of consumers and other stakeholders and, importantly, the profitability of their enterprises.

## *The value of behavior change*

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Behavior change, say Philip Kotler and Gerald Zaltman, is the aim of the discipline of social marketing, a process that applies commercial marketing principles and techniques to prompt and support behaviors that benefit society as well as the individual. Since its introduction 40 years ago, social marketing has been applied primarily by governments and nonprofits to promote public programs focusing on improved health, safety, and/or sustainability practices.

In 2004, Philip Kotler and Nancy Lee suggested that corporations can and should be engaged in these efforts as well. Kotler and Lee coined the term “corporate social marketing” (CSM) to describe the application of social marketing to commercial entities pursuing the twin goals of business success and social good. Their concept is grounded in the science and art of social marketing, the premise of which is that the same marketing principles that are used in selling a product, including consideration of the 4Ps (product, price, place, and promotion), *can be successfully applied to selling ideas, attitudes, and behaviors* that prompt and support desirable social change. Advancing public good by seeking to change behavior, they said, does not have to be mutually exclusive from building markets for products or services. In fact, the two go hand-in-hand. Because, as articulated by Kotler and Lee:

“... a change in personal behavior stands a good chance of effecting change in consumer behavior. When people change the way they act, and then personally benefit from those actions, they are likely to have a strong positive association with the company that spurred the change.”

Investing in behavior change elevates the influence and value of being a responsible and profitable business. Significantly, we see it as the leading edge to build a firm connection with stakeholders and reap the benefits of a two-way relationship with them. For example, promoting and prompting behavior change can change the degree to which employees positively manage their personal health and well-being. That in turn can lower health care costs for companies, as Safeway has shown. And motivating people to act on their concerns about climate change (beyond just acknowledging the potential problem) can lead to more purchases of lower-emission, fuel-efficient vehicles, which in turn increases demand for automakers who manufacture these vehicles.

Whether engagement in social good is pursued via sustainability, philanthropy, citizenship, supply chain accountability, or any another element of CSR, outcomes and benefits can be turbo-charged via the application of social marketing and behavior change principles.

Corporate social marketing initiatives go beyond traditional approaches. Good corporate social marketing doesn't stop at advertising, on-pack promotions, matched donations, in-community volunteering, or discretionary spending on social causes unrelated to a company's core business. In fact, as noted by Kotler and Lee, corporate social marketing is reflective of a company's business objectives while simultaneously generating social good.

The utility of corporate social marketing is far-reaching and can be used to engage with a wide variety of audiences and stakeholders – from consumers to customers to employees – to tackle many business challenges in socially beneficial ways. Consider the following scenarios:

## Consumer engagement: Good Grocery

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A grocery retailer has defined its mission to help consumers make healthier food choices – especially for children, given the rise in obesity among youngsters. The hypothetical retailer, which we'll call Good Grocery, also recognizes the growing market for better-for-you foods, which, according to a recent study by the Hudson Institute, made up 40% of all U.S. grocery purchases but generated more than 70% of the growth from 2007 to 2011.



Good Grocery has heavily promoted its commitment in the area of healthy eating. Its high-profile presence sponsoring and funding healthy eating events and initiatives throughout the community is matched by a commitment to devote a premium amount of shelf space in the store to better-for-you foods. Good Grocery is eager to lead by example, sharing its mission and commitments with customers in order to encourage better food-purchasing habits. The brand manager, CSR officer, and even the CEO at Good Grocery want to connect with shopper moms on this issue.

For the most part, Good Grocery thinks it's doing a pretty good job developing a bond with shopper moms. They're receptive to hearing about what Good Grocery is doing and are aware of the types of products available at the store.

But despite this (and to the consternation of executives at Good Grocery), the shopper mom targets aren't behaving any differently. Their appreciation of the responsible actions of Good Grocery isn't translating into making more better-for-you foods purchases, which is of course the direct, immediate outcome Good Grocery desires.

In order to create profitability for Good Grocery while also advancing meaningful dietary change for shopper moms, Good Grocery will need to overcome the inertia behind old shopping habits. To do that, they'll need to understand the behaviors of individuals like the shopper mom. There are barriers to shopper mom's involvement that have little to do with her knowledge of Good Grocery and the need to buy healthy food for her kids. Shopper mom may know what the right thing to do is and may have the best intentions, but she may lack the skills to embrace change or the confidence (self-efficacy) to believe she is capable of changing. Shopper mom can also be hampered because her motivations aren't being addressed properly. Perhaps she's not being prompted in the right way to do the right thing. Or maybe what influences her isn't being leveraged as it should be. It could be that she doesn't have reinforcement for ongoing action on her part.

A social marketing approach can amplify and expand on awareness efforts by prompting Good Grocery leaders to focus very specifically on what shopper mom is – or is not – doing and why. Then they can consider the best activities and channels for supporting sustained behavior change.

### Employee engagement: Careful Chemical Company

Careful Chemical Company is a hypothetical national manufacturer and supplier of compounds used by a range of industries from technology to automotive to household goods. It employs thousands of people in plant operations, warehouses, and supply chain functions.

Careful Chemical is fastidious about safety. It genuinely cares about its employees and wants to safeguard its record as an industry standard-bearer of best practices. The Company is also aware of the costs incurred by OSHA shutdowns in the wake of safety incidents, both in terms of fines and production halts – not to mention the potential costs to the company for worker compensation or disability payments due to workplace accidents that could have been prevented. As a result, the company invests substantial time and resources in employee communications about safety practices and procedures. New employees receive detailed information outlining proper procedures during employee safety orientations. Signage and precautionary warnings are placed throughout sites and facilities, and cascading communications through managers down to line employees keep everyone up-to-date on changes to safety operations and processes. Employee lunchrooms and other gathering spots feature safety posters and reminders of best practices. The Company even incentivizes attention to safety with modest group monetary rewards to those site operations that achieve a zero-incident record over a period of time.

Despite these efforts and more, Careful's CEO has noticed, with increased alarm, that when he walks the plant floors or visits warehouses, he sees employees on the manufacturing line without their safety goggles. He sees warehouse dolly operators ignoring their safety belts, and he is particularly disturbed by the sight of visitors moving about unattended or congregating in areas where they could encounter harm.

While Careful Chemical Company makes use of a wide range of information and communications channels to shape an environment of safety, there's attention to cultural nuances that's necessary as well. Beyond information dissemination, the Company must consider the social and cultural norms that impact why people do or don't do things. For example, if plant supervisors rarely wear safety goggles, they are reinforcing that same disregard in the workers on the line. Social marketing acknowledges – and leverages – behavior models like the theory of social learning, which asserts that people learn from modeling the behaviors of others. When we see others – especially those in positions of authority – taking certain actions, it encourages us to engage in similar actions.

In the case of Careful Chemical Company, information must be supplemented with appropriate interventions and motivations to change behaviors and intentions, shift attitudes, and transform the culture of Careful's employee community.

*Moving from cause to change*

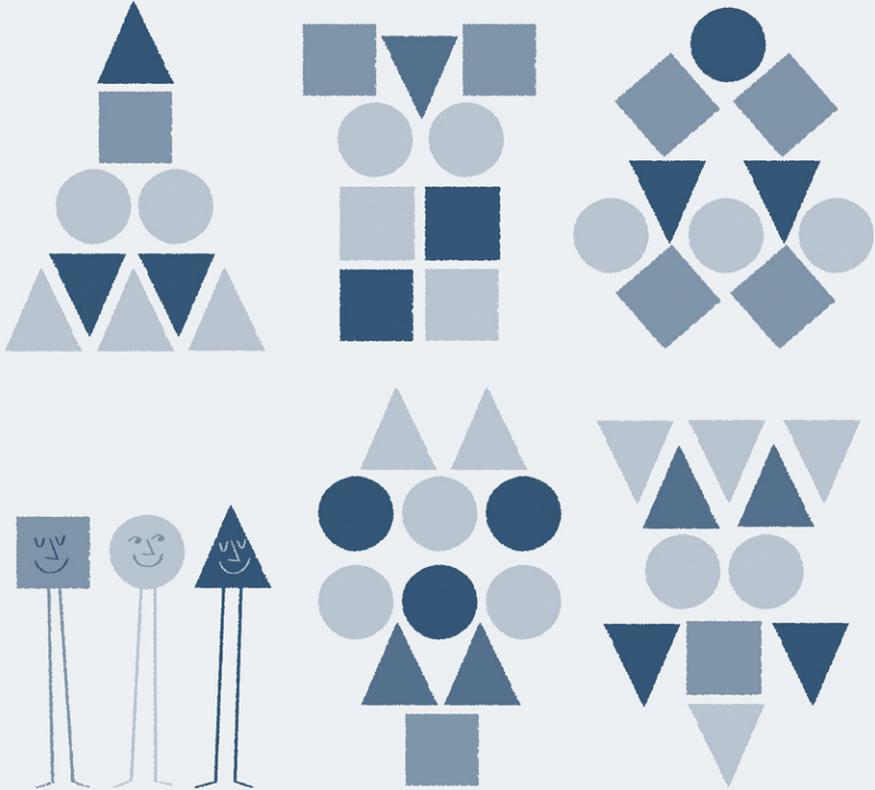
*Businesses must adopt and invest in an explicit behavior change agenda if they are to have the kind of return on investment they desire. And that starts with understanding behavior itself.*

*Behavior is shaped by many factors. Our environment and the people around us, for example, can encourage or discourage what we do or don't do. Personal factors – attitudes, beliefs, knowledge, and habits – impact our actions. So do characteristics like confidence, self-esteem, ability, and skill.*

*Just as there are many factors that contribute to why we behave a certain way, so too are there many ways to facilitate a desired change among a group of people. Often, change is built on a continuum of awareness to attitudes to intentions to behavior. But it's important to remember that this isn't always the case.*

As the growing body of behavioral economics research suggests, individuals change for different reasons; their starting points for making a change differ as well. For example, some people will change their attitude *after* changing their behavior as a means for justifying that change. This is especially true for a change prompted by something like peer pressure.

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For all those reasons, behavior change programs must thoroughly address the context of the desired change and be tailored to specific audiences.

Consider the case of Good Grocery, discussed earlier. What may be missing from Good Grocery's arsenal are programs that facilitate behavior changes in shopper moms and engage those same moms in a specific action. For example:

- Discounts or coupons as incentives to buy (and try) new, healthier product lines.
- Shopping lists and recipes displayed throughout the store for meal options that use Good Grocery’s healthier food products.
- Workshops to teach how to read product labels as a way of building skills and confidence about nutrition.
- In-store cooking demonstrations (especially those that engage children) to build skills about food preparation.
- Partnerships with pediatricians, mommy bloggers and other influencers that moms trust to talk about their experience with Good Grocery and reinforce the importance of purchasing healthy foods for children.

These are activities that drive more than interest or awareness. They drive action because they support specific behaviors. And more specifically, they drive an action by a company’s stakeholder group, not necessarily the company itself. This is the distinction between a behavior change agenda rooted in a corporate social marketing campaign and other socially responsible initiatives. Kotler and Lee articulated the differences as follows:

## Definitions

<i>Corporate Social Marketing</i>	★	<i>Supporting Behavior Change</i>
Cause Promotion	★	Supporting social causes through paid sponsorships of promotional efforts
Cause-related Marketing	★	Donating a percentage of revenues to a specific cause based on product sales during an announced period of time
Corporate Philanthropy	★	Making direct contributions to a charity or cause, usually in the form of grants or donations
Community Volunteering	★	Providing volunteer services in the community
Socially Responsible Business Practices	★	Adopting discretionary business practices and investments that support social causes

Now consider our analysis of how one company, Campbell Soup Company, works across the entire continuum of socially responsible initiatives to support their corporate commitment to wellness and nutrition and how, specifically, corporate social marketing provides the boost for creating sustained behavior change that impacts the company's bottom line.

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*Behavior change programs must thoroughly address the context of the desired change and be tailored to specific audiences.*

## Examples

<i>Corporate Social Marketing</i>	★	Campbell makes a \$10 million behavior-change investment in its hometown of Camden, NJ to prompt changes in physical activity and diet, with the aim of helping to reduce childhood obesity in Camden's children by 50% and prompting purchase of better-for-you food products.
Cause Promotion	★	Campbell created the Address Your Heart program to raise awareness and funds to support the fight against heart disease, pledging more than \$3.6 million through 2012 to the American Heart Association.
Cause-related Marketing	★	Pepperidge Farm, a Campbell brand, released specially pink-wrapped Milano cookies to show support for Susan G. Komen for the Cure® during National Breast Cancer Awareness Month.
Corporate Philanthropy	★	During football season, Campbell supports each NFL team's relationship with a local food bank by donating 1,000 cans of Campbell's Chunky Soup in support of food drives.
Community Volunteering	★	During Make a Difference Week, Campbell and Pepperidge Farm employees volunteer with more than 25 different agencies on projects related to childhood obesity and hunger, such as sorting food at a local food bank and teaching nutrition to urban youth.
Socially Responsible Business Practices	★	As part of its partnership with the Alliance for a Healthier Generation, Campbell adopted voluntary nutrition guidelines for snacks and side items in the U.S. and Canada. Examples include lower-sodium soups, whole grain Pepperidge Farm crackers and breads with zero trans-fats, and V8 beverages that provide one or more full servings of vegetables and fruits.

Behavior change approaches rooted in corporate social marketing are not substitutes for other socially responsible initiatives, but they can maximize outcomes of these CSR initiatives and contribute to business success. In the Campbell example, the behavior change (a new generation of customers adopting healthy lifestyles, including learning how to make healthier food choices) not only contributes to greater common good but also connects directly to the company's marketing and business objectives to build a future customer base for its product lines that are "better for you."

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SOUP

*Mastering the dynamics  
of behavior change*

*Successful social marketing and behavior change programs reflect careful and systematic research, planning, implementation, and evaluation. The essentials of a successful program are rooted in finding or creating answers to a number of key questions that define the **The Dynamics of Change**.*

*This is a process that methodically examines:*

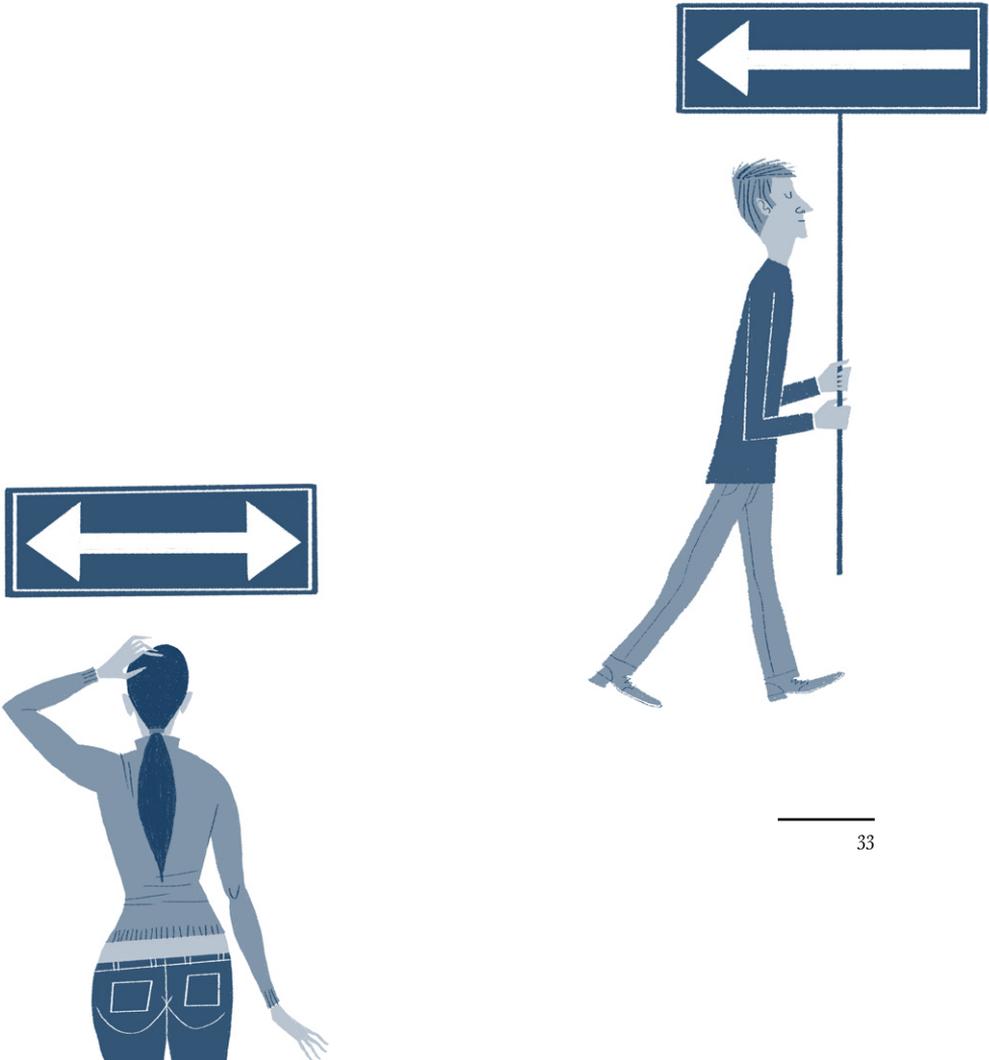
- 1. What is the change that is desired and achievable and among whom?*
- 2. What is required to bring about that change?*
- 3. How is that change best prompted and supported?*

## The Dynamics of Change— Key elements to consider

What is the desired change we seek? (Research)	Discovery and opportunity identification	Audience analysis and segmentation	Barrier and competitive analysis
What is required to effect the behavior change? (Planning)	C-suite commitments	Behavior intervention models and theories	Partner/ally identification & cultivation
How do we drive and support the desired change? (Program implementation)	Integrated & sustained program elements	Incentives & motivational tools	Monitoring & assessment

## *Deciding what change to seek*

Behavior change is a significant undertaking, and before a company goes down this road, it must make a careful assessment of both the opportunities and challenges inherent in what it is about to undertake. At a minimum, a company must be quite clear on exactly what behavior change it desires and then determine if that change is even achievable. If it is, among what audiences or audience segments can that change be most effectively prompted and sustained? Behavior change also requires careful consideration of how best to position a committed business to overcome barriers to success and position itself competitively as a leader in addressing the issues at hand.



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*Real behavior change is rarely a one-time, one-off decision-making process, but it is rooted in prompting changes in decision-making.*

## Discovery and opportunity identification

It's critical for a company to specifically determine appropriate and realistic opportunities or objectives that are possible with shifts in behavior. For example, is it increasing purchases of a product (like healthy foods or fuel-efficient vehicles)? Use of a service (like an on-site, drop-in health clinic)? A different way for a stakeholder to do something (like not relying on a grocery store for grocery bags and instead having customers bring their own)? Reducing consumption of something (like electricity, as described in the PSE example)?

Remember, the focus and end result should be about getting people to “do” something different and not just “think” about something differently.

## Audience analysis and segmentation

Successful behavior change and social marketing programs depend on a deep understanding of their target audience(s), including insights into audience characteristics and needs. Such an understanding also encompasses a well-rounded appreciation of how the potential behavior change will fit within the audiences' lives. What are the factors that define or influence both the desired change in existing behavior and the new behavior we'd like them to adopt? Relevant factors are likely to be found not only within and among the individuals being targeted, but also within the broader context of their lives – like family, home, work, neighborhood, and community influences.

Real behavior change is rarely a one-time, one-off decision-making process, but it is rooted in prompting changes in decision-making. We typically change our behavior when we make a decision to do or not do something. So understanding *how* your audiences make decisions and what their motivations are is imperative. Look at where your target audience is along the behavior change continuum to understand better the triggers that can lead them to take a step toward change.

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Decades of proven behavior change and social marketing programming also have demonstrated the importance of avoiding blanket approaches that assume that all members of an audience – be they consumers, employees, or vendors – can and will move along the behavior change continuum in the same way. One-size-fits-all interventions rarely work. Instead they must be tailored to specific audience segments.

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Audience analysis and behavior mapping can help produce the necessary insights into audiences. These techniques are especially helpful in identifying the distinct and relevant segments that should be targeted. This is a process that helps companies address such questions as:

- Who among our audience are likely to be early adopters of a desired behavior change?
- Are there subsets within those groups that have more of a propensity to do – or not do – what we want (like buying and using our cold-water formulated detergent or recycling our packaging)?
- What are the factors that drive their decision-making and that have implications for moving other audience segments further along the behavior change continuum?

Behavior or motivational mapping also helps identify the likely response of audiences to certain variables. Consider how the framing or presentation of a problem can affect actions. In *Nudge*, behavioral economists Richard Thaler and Cass Sunstein note, for example, the difference between asking people in a survey whether they are likely to lose weight, versus asking whether they intend to eat certain foods or to diet or exercise. The result: “When people are asked what they intend to do, they become more likely to act in accordance with their answers.... The answers to the questions will affect their behavior.”

Audience analysis also includes identification of secondary targets who can influence the primary audience or who must act in order to spur the change in the primary audience. Remember our CEO from Careful Chemical? He must acknowledge that the supervisors who don’t wear safety goggles are contributing to an undesirable “social norm” in the workplace. To reverse this, he needs to learn why these important influencers are not following the required procedures and address those barriers head on. Other examples of audience influencers are co-workers, family members, neighbors, friends, pop culture icons and relevant sources of authority (physicians, law enforcement, etc.).

## Barrier and competitive analysis

Once you have assessed and segmented your audience, it is time to identify the barriers you face and address the hurdles in your way. As you explore barriers, think about the following:

- How is the audience currently behaving?
- What's keeping the audience from adopting the desired behavior?
- Does the audience have the skill set to do what's being asked of them?
- What external factors (e.g., legal or regulatory matters, technologies, and cultural norms) impact how they behave?
- What beliefs and attitudes does the audience have about the behavior being sought (e.g., do they believe they have the ability to change; do they believe that something good will happen if they adopt the behavior; do they think their social network will support their behavior change)?
- What competitive behavioral messages or influences need to be taken into account (e.g., positioning your healthy eating message in an environment saturated with messages that promote less-healthy options)?

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Next, consider the potential challenges facing you as a company. Are your industry competitors engaging in similar programs and, if so, what is a niche or focus that you can rightfully “own” and leverage to support your business objectives? Is your company capable and credible enough to lead the behavior change movement? As noted by Kotler and Lee, some issues are simply not good matches for corporations or not right for them to take on alone. Sometimes, clinical or technical support beyond a company's native capabilities is required (hence the value of third-party partnerships discussed below).



## *Plotting the path to supporting change*

Mapping out a plan for successfully engaging in behavior change helps ensure that a company is ready, willing, and able to make a commitment. That plan, if it is to avoid known pitfalls and enhance the likelihood of success, must build upon the science that has grown up around social marketing and behavior change. As widespread behavior and social change is rarely the province of one agent in a society, planning for success also includes consideration of organizations that both share your commitment to your goals and can be cultivated as partners that extend your credibility, reach, and impact.

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### C-suite commitments

Setting the core objectives of a corporate social marketing plan should be done in the context of your broader business objectives and commitments with input from executive leadership. Behavior change objectives cannot be pursued in a vacuum. This mustn't be a discretionary effort but rather one that is fully integrated into the corporate mission from the C-level on down. It has to be shaped within broader business, policy, and regulatory contexts. This prevents siloed efforts and ensures the marriage between socially responsible, purpose-driven activities, and the business goals of your enterprise.

Behavior change programs cannot be conceived of as short term, or one-channel initiatives. You should keep in mind the following:

- Prompting and supporting behavior change requires a sustained commitment and is often a long-term proposition.
- You will need frequent and reinforcing messaging, communications, and program activities, and you will need to seed these through multiple channels and methods, repeatedly and over time, to obtain the reach, frequency, and impact required for change.
- Hands-on, active engagement (not just talk) with target audiences is essential to move them from thinking about something to doing something.
- It is important that audiences “feel” and see the benefits of making changes and that they understand their efforts have value and make a difference. You will need to reward and reinforce the desired behavior change accordingly.

Effective corporate social marketing programs also require companies to ensure that their values, principles, policies, operations, and activities are aligned with the socially desirable behavior change goals they are pursuing. After all, consider the implications if a manufacturer of sports equipment, eager to prompt more active lifestyles for children, launches a campaign to encourage purchase and use of the company’s products in the United States while at the same time the company is under scrutiny for child labor practices elsewhere. Their commitment, credibility, and effectiveness could be undermined.

## Behavior change models and theories

Behavior change strategies can and should build on proven theories and models grounded in communications, behavioral science, and social change. Relevant theories and models that have proven themselves over time include those that:

1. Illuminate the stages of behavior change that individuals typically move through as they consider, embrace, and sustain behavior change (e.g., Prochaska and DiClemente's Transtheoretical Model, also known as Stages of Change)
2. Demonstrate the importance of reaching and influencing not only individuals but the social network and broader communities of which they are part (e.g., Bronfenbrenner's Socio-Ecological Model) and
3. Illustrate how change can come to be diffused and embraced across an audience or society over time (e.g., Rogers' Diffusion of Innovation Theory)

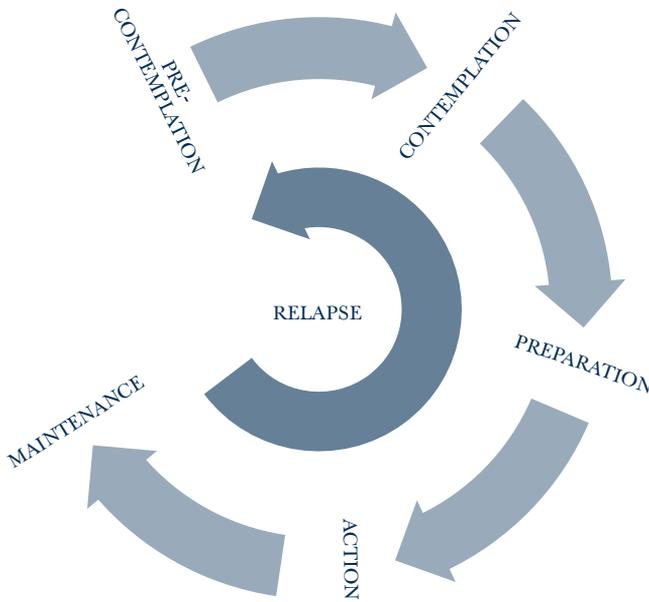
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change*

In our experience, successful behavior change programs must convince individuals that:

- They have a personal stake in the issue or outcome
- Changing behavior will result in benefits they care about
- The benefits outweigh the costs
- They have the ability to change their behavior
- Services/products are available to help them
- Social norms support their actions

Emerging biological and social science offer additional insights. Recent studies in neuroscience, for example, show that emotion is, at a biological level, an essential ingredient in decision-making. This reinforces a long-held understanding that to prompt behavior change we must touch the emotions as well as the rational mind. Behavioral economics also highlights the power of emotion in prompting behavior change, while emphasizing the importance of both the context and construction of messages and behavioral choices.

## No. 1. Stages of Change



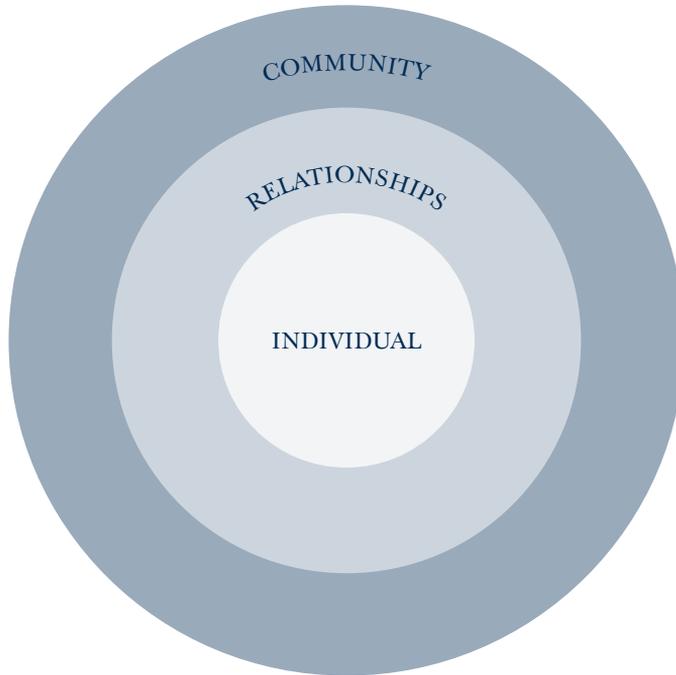
### *1. Stages of Change*

The basic premise of this model is that behavior change is a process, not an event. As a person attempts to change a behavior, s/he moves through five stages. Relapse may happen at any stage, causing the individual to revert to an earlier stage or begin the process again.

People at different points along the continuum have different informational needs and benefit from interventions designed for their stage.

## No. 2. The Socio-Ecological Model

*Mastering  
the dynamics  
of behavior  
change*

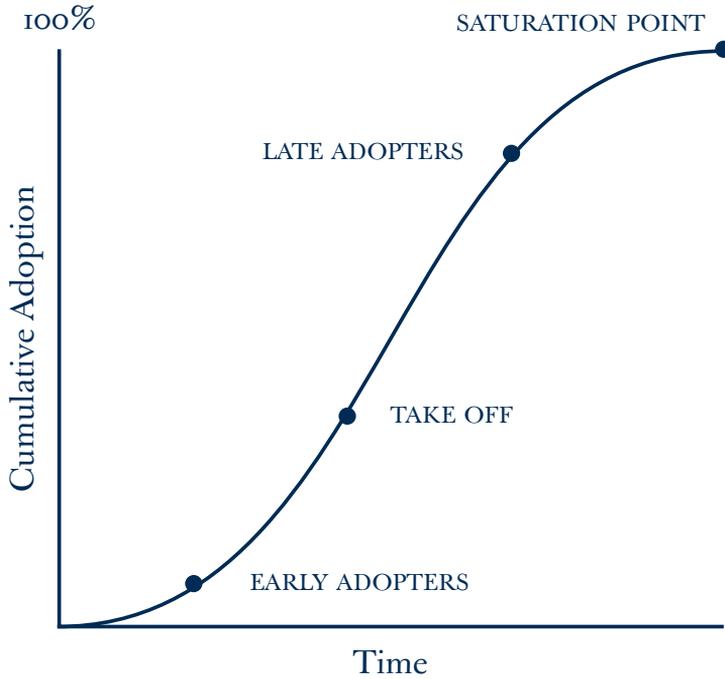


### *2. The Socio-Ecological Model*

This is a framework for considering the interplay between an individual, those with whom they have relationships, and community/societal factors.

Behavior both affects and is affected by multiple levels of influence. Individual behavior both shapes and is shaped by the social environment. Each sphere provides an additional opportunity to influence and impact the priority audience. Ultimately the most impactful programs are those that are multifaceted.

### No. 3. Diffusion of Innovation Theory



#### *3. Diffusion of Innovation Theory*

This theory addresses how new ideas, products, and social practices spread throughout society or from one audience to another. It is the process by which an innovation is communicated through certain channels over time, among members of a social system.

A number of factors are key in determining how quickly and to what extent an innovation will be adopted and diffused: relative advantage, compatibility, complexity, ability to be tried, and the degree to which it can be observed.

## Partner/ally identification and cultivation

In your planning, you will want to consider cultivating partners or allies. Such partnerships are often a distinguishing feature of corporate social marketing campaigns. Behavior change connected to solving major social issues and challenges, like the obesity epidemic or diminishing natural resources, typically requires expertise that lives beyond most companies. Arguably too, finding common purpose with a government agency or a public interest group with an equal commitment to an issue yields significant benefits such as expanded reach and authority.

So ask yourself: “Do we really have what it takes to knowledgeably and credibly lead movements around healthy eating? Education? Energy conservation? Will our efforts be enhanced by working with non-profits or public agencies with natural legacies in these areas? Whose endorsements and participation will inspire confidence and strengthen our impact?”

*Mastering  
the dynamics  
of behavior  
change*

## *Realizing the promise of change*

Bringing change strategies to life is not an overnight activity. You’ll need to commit to the long haul and actively seek out inventive and inspired ways to reach, engage, motivate, and support audiences on a sustained basis. Without question, you will also want to monitor and assess progress and be prepared to make midcourse corrections to spur improvements.

## Integrated and sustained program elements

Proven behavior change and social marketing programs tend to employ a range of methods to encourage and support their intended audiences to embrace change. They also take into account the varying needs of members of the audiences and the fact that needs change over time. As a result, effective programs avoid dependence on single methods or discrete approaches used in isolation. Rather, they reflect a range of integrated elements planned and plotted to unfold over time in ways that are complementary, reinforcing, and additive.



Many communications tactics – like grassroots engagement or media advocacy – are core to traditional behavior change communications programs. But you’ll need to adapt them to your audiences, their perceptions of the issue at hand, and the change you’re asking them to make. Consider the following questions:

- Are communications plans, tools, and products audience- and issue-driven?
- Are they incorporated into appropriate audience life paths, reaching targets where they live, work, play, and shop, as well as in the media that reach and influence them (e.g., social media)?
- Are they reflective of where audience targets are on their change journey (i.e., most likely to change, or least likely to change)?
- Are your activities and channels delivering maximum reach and frequency?
- Are you using a full suite of media (earned, owned, paid), all of which play a role in spreading the ideas and social practices that contribute to behavior change?
- Have you created engagement platforms that promote hands-on involvement to reinforce active engagement and not passive communications?
- Have you harnessed the power of media advocates, both in traditional media and social media, who are often key agenda-setters and opinion-influencers?
- Have you explored the power of pop culture, which, when used appropriately, can ignite movements that spark and support personal behavior change?

*Mastering  
the dynamics  
of behavior  
change*

## Incentives and motivational tools

With a firm understanding of the change needed (and why) as well as who is best suited to make this change (and how), you will be able to develop a framework for supporting the desired change. This should include consideration of such elements as:

- Motivational platforms and messages
- Program branding and identity
- Creative materials and tools, including how to incorporate them into existing communications, marketing, and advertising products

While these strategies may seem fundamental to any communications program remember, we're suggesting these strategies be filtered through and crafted against the backdrop of your audience mapping and analyses as well as applicable behavior change theories and models.

Let's unpack that. When you craft messages for a social marketing campaign, think about doing so in a way that underscores the personal benefit, speaks to motivations, and addresses negative or unintended consequences and other factors that influence individuals to consider and embrace change.

And while your audience analysis may have echoes of research performed by your marketing and research teams (who may profile your audience and examine their lifestyle and preferences), their work often does not sufficiently answer why your audience does or does not "do" something.

Health-conscious moms, for example, as a category, may seem to be predisposed to making healthy food purchases. And yet many of them *do not* do so. Many factors influence how they shop for groceries and what they buy and prepare for their families. For some of these moms, the perceived health benefits may not outweigh the perceived high price of these products. For others, the perceived challenges associated with preparing new foods (added time and complexity) trump their desire to introduce new and healthier products into their family's diet. Insights like these (and their corollary solutions) are what emerge from a social marketing approach.

As you consider your branding strategy and the creation of your creative materials and tools, do so in a social marketing context. They should be reflective of the behavior profile of the intended audience and be culturally, emotionally, and linguistically appropriate (while of course having cohesiveness and synergy with your other traditional communications products).

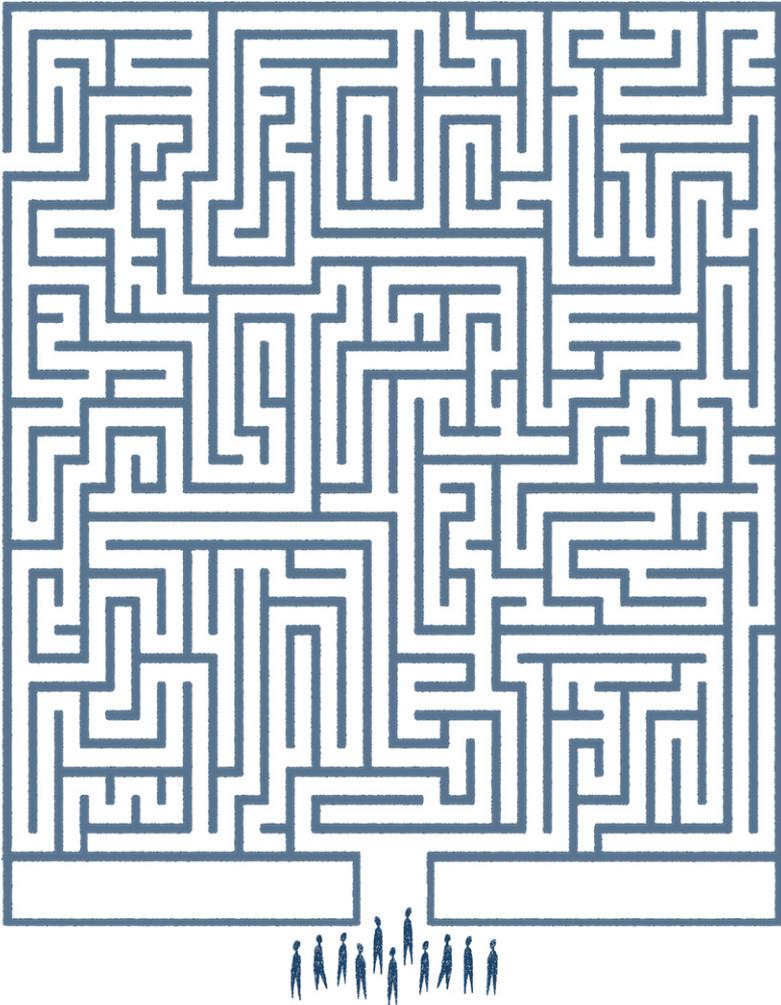
### Monitoring and assessment

Measurement is crucial to both evaluate success and help optimize the initiative for the future. While behavior change *will* have a direct impact (because the intended result is a specific action), you must be prepared to invest the time and resources necessary to move the needle. That means looking at interim metrics to gain assurance that you are headed in the right direction.

Measurement must look beyond process measures (such as reach, number of media impressions, etc.) and look at impact and outcome. An interim impact metric might be something like “signing up for a healthy cooking class” or “taking a workplace safety pledge.” Outcome metrics are the actual measure of the end behavior sought, like increased market share of a healthier food product line or reduced worker safety incidents.

Evaluation methods and the timing of those evaluations will need to be determined in concert with setting your initial objectives.

success



*The benefits of embracing  
behavior change*

*When designed well and implemented properly, behavior change-based corporate social marketing campaigns can generate meaningful benefits for companies, their customers, and other stakeholders, as well as society at large. For companies, this can include:*

- *Building markets and driving demand*
- *Strengthening brand positioning by leveraging positive associations between your commitment and your brand*
- *Creating brand preference and/or loyalty*
- *Positioning your company as a leader that supports widespread and highly desired behavior change to achieve important social goals*
- *Building strong community relationships by attracting credible partners, including public sector agencies, non-profit organizations, foundations, and special interest groups that share a commitment to influencing public behavior in support of mutual social goals*
- *Attracting and retaining employees who value the positive social change the company's efforts help make possible*
- *Increasing profitability by influencing behaviors that can reduce operating costs and expenses*
- *Improving the long-term operating environment impacting a business's current and future success*

# *Conclusion*

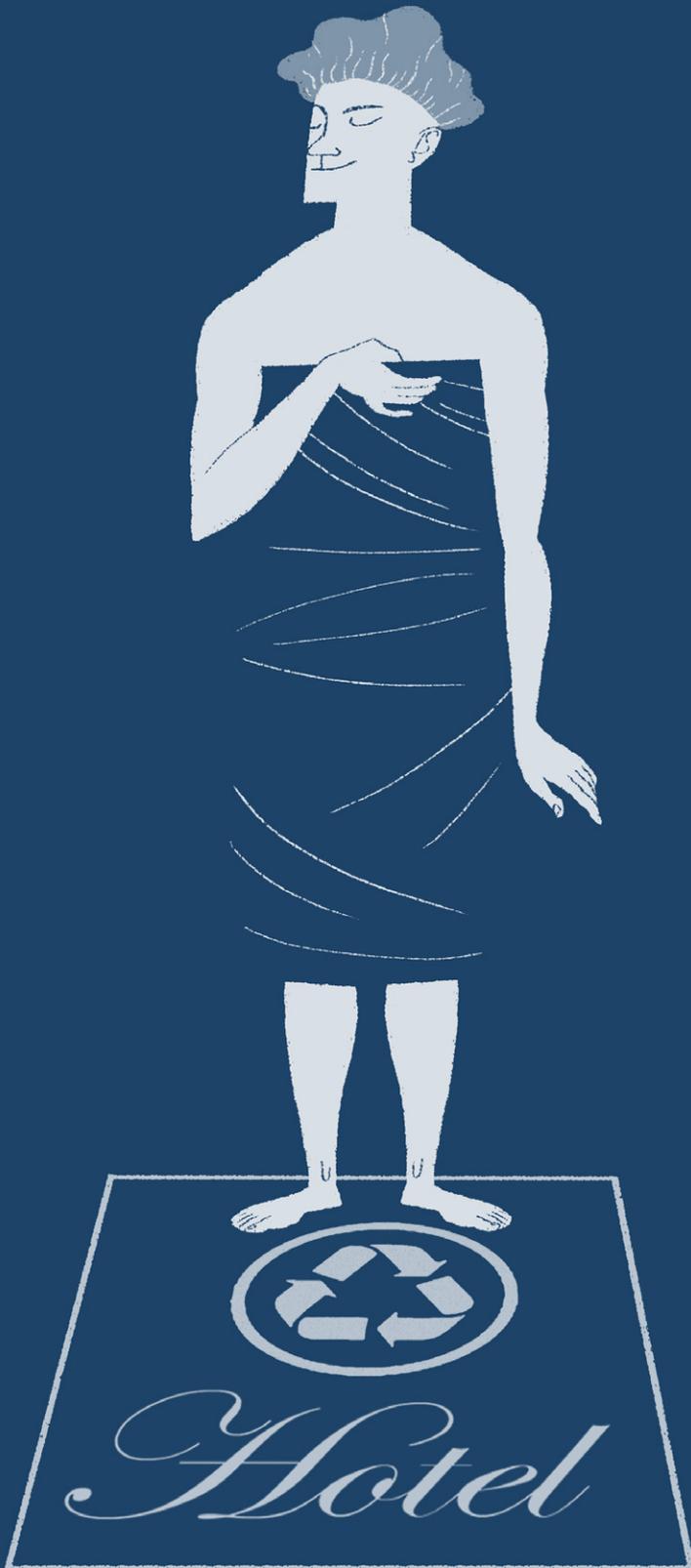
*Corporations have begun to embrace fully the practice of socially responsible behavior as a means to sustain and grow their businesses. But maximizing business performance and effectiveness requires advancing beyond actions and practices that companies do on their own. The next evolution is for companies to enlist their customers, employees, and other key constituents in those practices. Corporations are just starting to follow the lead of companies like Unilever, which today directs its water conservation efforts not only at its own plants and manufacturing facilities, but at the farmers and suppliers who grow crops for its products and the people who use 92% of the water associated with Unilever's skin cleansing products. After all, when you get right down to it, Unilever cannot sustain its shampoo or soap lines for generations to come if there is a shortage of the water required for their use. Helping customers learn new behaviors, Unilever has realized, is critical to its very existence in the years to come.*

Like Unilever, other companies in many industries have recognized the relationship between their business objectives and social change. CEOs of grocery chains and food manufacturers, for example, acknowledge that product lines of foods that are “better for you” will fail without a change in our approach to healthy eating. Hotel chain executives understand that they cannot conserve water and reduce laundry costs unless hotel guests choose to reuse their towels. And so on.

There are meaningful and measureable benefits to be gained from the private sector adopting behavior change and corporate social marketing initiatives. For business, it can result in everything from market expansion and reduced costs to strengthened brand positioning and an enhanced reputation. For individuals, it can lead to healthier and more productive lifestyles. And for our society as a whole it means a more prosperous and enduring world.

*Conclusion*

Global forces such as food security, the need for sustainable energy, the prevention of chronic disease, and so much more, are forcing us to reconsider how we live. The issue of who leads us in change is vital. There is a unique depth of resources, innovation, and sheer resolve waiting in the wings of the private sector while governments and NGOs are crying out for help. Adding corporate leadership to the voice of government and public interest organizations will create a multi-faceted approach with exponential benefits for individuals, societies, and corporations.



## *Key takeaways*

- Companies can reap meaningful and measurable improvements in business performance and return on investment from behavior change programs and social marketing campaigns, ranging from market expansion opportunities and reduced costs to strengthened brand positioning and an enhanced reputation and leadership profile.
- Corporate social marketing and behavior change programs allow companies to advance and evolve their engagement in public good and help them reinforce many of their corporate responsibility initiatives.
- Corporate social marketing is an emerging opportunity for companies who want to harness the power of proven behavior change strategies most traditionally associated with government and nonprofit initiatives.
- Understanding *what the behavior is* of target audiences is fundamental to identifying the change that may be needed or desired.
- The Dynamics of Change process can help shape core elements of a change program by addressing such factors as:
  - What is the change that is desired and achievable, among whom?
  - What is required to bring about that change?
  - How is that change best prompted and supported?
- Behavior change programs must be supported by the C-suite and must reflect the broad business objectives of a company. If they are to be effective, they cannot be viewed as discretionary nor can they be pursued in a vacuum.
- Behavior change strategies can and should build on proven theories and models grounded in communications, behavioral science, and social progress.
- Corporate social marketing helps companies strengthen the increasingly important – and necessary – relationship among a thriving business enterprise, the well-being of stakeholders, and social progress.
- Global changes to the economy, to our environment, and to our social welfare are mandating new approaches to how we live. Adding behavior change leadership from the private sector to that of government and public interest organizations will create a multi-faceted approach with exponential benefits.

Corporate social marketing has relevance and benefits for a large number of companies operating across many sectors. The following table illustrates examples of desirable behavior changes that offer concrete business-building opportunities and benefits for a range of different types of companies and industries.

## Illustrative Examples of Opportunities for Applying Corporate Social Marketing

Key takeaways

Health & Wellness

<i>Behavior Change</i>	<i>Examples of Types of Businesses That Benefit</i>	<i>Examples of Opportunities / Benefits</i>
Eat Healthier	<ul style="list-style-type: none"> <li>• Consumer Packaged Goods Manufacturers</li> <li>• Restaurants and Other Food Service Companies</li> <li>• Grocers and Other Retailers</li> </ul>	<i>Benefit to Business:</i> Market expansion for healthier food products.
		<i>Benefit to Individuals:</i> Improved personal and family health.
Adhere to Medication Regimes	<ul style="list-style-type: none"> <li>• Pharmaceutical Companies</li> <li>• Health Insurance Companies</li> <li>• Employers</li> </ul>	<i>Benefit to Society:</i> Healthier individuals, families, and communities; reduced chronic disease and associated healthcare costs.
		<i>Benefit to Business:</i> Increased sales and appropriate use of prescription drugs; decreased insurance claims; increased individual health and worker productivity.
		<i>Benefit to Individuals:</i> More effective disease management, improved health, reduced morbidity and associated long-term healthcare costs.
		<i>Benefit to Society:</i> Healthier individuals, workforces, and communities.

Environmental

<i>Behavior Change</i>	<i>Examples of Types of Businesses That Benefit</i>	<i>Examples of Opportunities / Benefits</i>
Conserve Water	<ul style="list-style-type: none"> <li>• Food and Beverage Companies</li> <li>• Utilities</li> <li>• Manufacturers</li> </ul>	<p><i>Benefit to Business:</i> Reduced manufacturing/operating costs; sustainability of vital natural resources.</p> <hr/> <p><i>Benefit to Individuals:</i> Reduced household water utility bills; continued access to essential resource.</p> <hr/> <p><i>Benefit to Society:</i> Sustainable water supplies.</p>
Recycle & Reduce Waste	<ul style="list-style-type: none"> <li>• Manufacturers</li> <li>• Consumer Packaged Goods Manufacturers</li> <li>• Retailers</li> </ul>	<p><i>Benefit to Business:</i> More efficient, compact packaging that maximizes shelf space and units per load shipped; decreased costs; potential tax benefits.</p> <hr/> <p><i>Benefit to Individuals:</i> Reduced costs; reduced waste; enhanced convenience; potential discounts and tax benefits.</p> <hr/> <p><i>Benefit to Society:</i> Reduced environmental impact and reduced need for landfilling and incineration.</p>

Personal Finance & Online Security

Increase Financial Responsibility	<ul style="list-style-type: none"> <li>• Banks &amp; Financial Institutions</li> <li>• Credit Card Providers</li> </ul>	<p><i>Benefit to Business:</i> Larger and less-risky customer base.</p> <hr/> <p><i>Benefit to Individuals:</i> Increased personal asset building and financial management skills; financial security</p> <hr/> <p><i>Benefit to Society:</i> Improved financial management skills; increased economic security and stability.</p>
Protect Online Identity	<ul style="list-style-type: none"> <li>• Protection Services Companies</li> <li>• E-Commerce Retailers</li> <li>• Social Networking Sites</li> </ul>	<p><i>Benefit to Business:</i> Mitigated losses; increased purchase and use of security products and services; increased use of e-commerce.</p> <hr/> <p><i>Benefit to Individuals:</i> More secure personal and financial data; increased comfort, ease, convenience, and peace of mind using electronic devices and e-commerce.</p> <hr/> <p><i>Benefit to Society:</i> Safer online interactions; reduced fraud, abuse, and theft.</p>

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*Given their shared commitment to working with companies dedicated to advancing social good, the authors are leading efforts to deploy Ogilvy Public Relations' behavior-change driven social marketing capabilities on behalf of the business community.*

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Bess Bezirgan is passionate about the intersection of social good and behavior change, a passion that is rooted in deep experience in corporate sustainability and CSR. She partners with clients on campaigns to enhance reputations, showcase inventive thought leadership, cultivate ally support, and more. Bess has provided communications counsel on issues ranging from energy and water to recycling and responsible forestry to such leading global brands as Tetra Pak, Asia Pulp and Paper, Aveda, and the Dow Chemical Company. She has worked with client and agency teams in the U.S., Europe, Asia, and the Middle East.

At Ogilvy Public Relations, Bess helps identify opportunities for private sector companies to leverage behavior change to impact their business objectives while improving the well-being of individuals and society. Her private sector experience is complemented by work in the public sector – for elected officials in the U.S. Congress, several government agencies, and for the Government of the Cayman Islands.

She received her bachelor's degree in History from Tufts University and earned a master's degree from Northwestern University's Medill School of Journalism. Bess is also a graduate of Stanford University's Business Strategies For Environmental Sustainability, a program of the Stanford Graduate School of Business. She is a native of Austin, Texas but has called the Washington, DC area home for the past 15 years.

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Tom leads Ogilvy Public Relations' efforts to help clients apply social marketing and behavior change communications to address public health, public safety, and social issues across the globe. He has been one of the industry's leading social marketing practitioners since joining Ogilvy Public Relations in 1988 to direct the agency's work on behalf of the Centers for Disease Control and Prevention's (CDC) landmark *America Responds to AIDS* public education campaign. He subsequently led Ogilvy's expanded support of a comprehensive body of work for CDC, as well as for the National Institutes of Health, the Centers for Medicare & Medicaid Services, and other major government clients. Tom's expertise in social marketing and change communications also has been applied to other Ogilvy clients, including the World Bank, Merck, Pfizer, GlaxoSmithKline, Nestlé, American Hospital Association, and UNICEF.

Tom is credited with leading efforts to build the agency's preeminence in social marketing and is now focused on enhancing that capability worldwide. Before being named head of the agency's dedicated social marketing team, he served as co-lead of the agency's Global Healthcare Practice for nearly a decade.

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Tom puts his commitment to causes and social change to work in other ways, including service on the Boards of the International Social Marketing Association; the Sewall-Belmont House & Museum/National Woman's Party; the National Research Center for Women & Families; and the American Forest Foundation. Tom also has served on the Boards of OWL: The Voice of Mid-life and Older Women; the Epilepsy Foundation; and the National Council on Aging. Tom holds both a bachelor's degree and master's degree in health services administration from The George Washington University.

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Jennifer leads the Social Marketing Practice of Ogilvy Washington and has dedicated much of her 20-year career – all of it with Ogilvy Public Relations – to establishing the agency as a recognized industry leader in the discipline of social marketing. An expert in public health and safety, she has deep expertise in issues ranging from women’s health and youth marketing to cardiovascular disease, cancer, vaccines, osteoporosis, and violence prevention.

Jennifer guides strategic planning for national initiatives across a range of business sectors, and has provided counsel and social marketing expertise to such clients as Merck, Pfizer, GlaxoSmithKline, the American Hospital Association, the U.S. Department of Health and Human Services, the National Institutes of Health, and the Centers for Disease Control and Prevention. She has worked with the National Heart, Lung, and Blood Institute on several agenda-setting initiatives including *The Heart Truth*<sup>®</sup>, an award-winning national campaign that started the national women’s heart health movement with its signature Red Dress symbol. She has also worked on *We Can!*, a national childhood obesity prevention program.

Jennifer is a frequent university lecturer, contributor to the social marketing literature, and blogger ([smexchange.ogilvypr.com](http://smexchange.ogilvypr.com)), and speaks regularly on social marketing at international and national conferences. She holds a master of health science degree in Behavioral Science and Health Education from Johns Hopkins University’s Bloomberg School of Public Health and a bachelor’s degree in Marketing from Lehigh University. Jennifer is a founding member of the International Social Marketing Association and was named the 2007 Washington PR Woman of the Year by Washington Women in Public Relations. A born and bred New Yorker, Jennifer currently lives near Washington, DC.

## Michael Briggs

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A senior manager and strategist who works across Ogilvy Public Relations' Strategy + Planning and Social Marketing groups, Michael has more than 20 years of experience developing and implementing communications solutions for diverse issues and industries.

Michael provides counsel for some of the agency's key clients – government agencies as well as leading brands, corporations, and nonprofits – and is called upon to assist teams across the agency. A skilled planner and facilitator, he brings new insights and ideas to client challenges and trains both colleagues and clients on brainstorming, business development, and storytelling. Michael is known for his creativity, strategic thinking, and expertise in branding, messaging, and behavior change.

Michael has had the privilege of advising clients as diverse as the National Institutes of Health, GlaxoSmithKline, Nestlé, Merck, U.S. Department of the Treasury, Kraft, Intel, Lance Armstrong Foundation, DuPont, Microsoft, Wells Fargo, Marriott, and the Centers for Disease Control and Prevention. He is a founding member of the International Social Marketing Association. Among his achievements is an HIV program for Washington, DC that was selected as multicultural campaign of the year by *PR Week* and replicated by health departments nationwide.

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Prior to joining Ogilvy Public Relations in 1998, Michael was communications manager for InterAction, the nation's largest association of global disaster relief, development, and refugee NGOs. Before that, he managed media relations and national events for Oxfam America, an international development NGO.

Michael lives in Washington, DC, where he serves on the board of the United Nations Association of the National Capital Area as chair of the communications committee. He has a bachelor's degree in English Literature and Literary Theory from Clark University.



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