The quadripolar method applied to the results evaluation in social marketing projects

O método quadripolar aplicado à avaliação de resultados em projetos de *marketing* social

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ABSTRACT

The social marketing campaigns are extremely important to help promote behaviours and attitudes that improve living conditions in society. But to consider the effectiveness of these practices, the verification and evaluation of its results are crucial points to give credibility to its actions. This article aims to present initial considerations for the elaboration of a research plan about the evaluation models of social *marketing* projects, based on the quadripolar method, which was idealized for the scientific research in social sciences. Thus, this document seeks to structure the scientific investigation bases according to the epistemological, theoretical, technical and morphological poles (basis of the quadripolar method), that will guide the execution of a research that has as one of its aims to evaluate the evaluation models of social marketing projects

Keywords: Social Marketin*g*; Quadripolar Method; Evaluation

RESUMO

As campanhas de *marketing* social são extremamente importantes para ajudar a promover comportamentos e atitudes que melhorem as condiçoes de vida em sociedade. Mas para que as mesmas sejam consideradas efetivas, a constatação e avaliação dos resultados que produzem são pontos cruciais para dar credibilidade a este tipo de prática. Este artigo visa apresentar as considerações iniciais para a elaboração de umplanejamento de pesquisa sobre os modelos de avaliação dos projectos de *marketing* social, baseado no método quadripolar, que foi idealizado para a pesquisa científica em ciências sociais.Assim, este documento busca estruturar as bases de investigação científica referentes aos pólos epistemológico, teórico, técnico e morfológico (base do método quadripolar) que vão guiar a realização de uma pesquisa que tem como objetivo avalilar os modelos de avaliação dos projectos de *marketing* social.
Palavras-chave: *Marketing* Social, Método Quadripolar, Avaliação.

INTRODUCTION

We live in a world in which poverty and social inequalities are increasingly relevant, even with the great efforts of organizations working to diminish their effects. It seems that over the years and with the development of society, instead of narrowing the differences in quality of life, we actually have a widening gulf between those who live well and those who face social problems in their daily routine.

Social problems have two major causes that determine their origins and the difficulties in fighting them, one of them concerns economic issues and the other concerns cultural customs and inheritance that make it difficult to adopt measures aimed at solving social ills. Both factors are extremely complex and interrelate, making the fight against poverty and inequality a difficult task to be tackled, which requires the joining of efforts of different actors in society under a common strategy that requires a lot of planning, so that it can be really effective.

Simply putting it, much of the problem of poverty and social ills could be solved with a simple matter called education. Full access to it would ensure adequate socioeconomic development, bringing income, knowledge and basic notions of health for all, thus preventing billions of people from experiencing difficulties, without access to basic services as it has and always had occurred in the history of mankind. Far from living in a perfect world, we know that most people do not have access to education from the earliest stages of their lives, which makes the reality of inequality an almost endless problem and the challenge of fighting it a very difficult mission.

Access to full education is a luxury for a minority of the world's population, and this entails serious problems ranging from disease transmission for lack of knowledge of it to environmental degradation for the same reason, among others. The fact is that in the absence of education, all life in society is basically guided by common sense, beliefs and values of a locality. The problem is that these factors are usually unquestionable, they are present in a given culture for years, centuries, and therefore difficult to challenge.

When we talk about public health and social development issues, the facts outlined in the previous paragraph can be colossal barriers to improving the life of a community. How do we convince someone to use condoms when religion says it is forbidden? We are not saying that we have to end different cultures and beliefs, but only by noting that without the support of education, any and all communities runs the risk of facing problems that may eventually destroy themselves.

In the absence of ideal conditions for the development of society, different proposals are put to the table in order to reduce poverty rates and improve the quality of life of billions of human beings. Different sectors of society (including governments), such as third sector companies and organizations, are increasingly active and develop projects aimed at social development. Non-

governmental organizations already understand that it is their role also (not just the governments) to ensure that we have an increasingly fair and egalitarian society.

These institutions often operate through socio-cultural activities developed within local communities, where they seek to transmit values and knowledge to improve life in society. But these activities by itself are not enough to achieve a satisfactory outcome, and are thus part of a larger project, which includes several actions and steps, within an action timeline with well-defined objectives, target audiences and strategies, brought together under the "umbrella" of a social marketing plan.

Now, if the marketing strategies already established are so good for selling products and services, it can also be good for the "sale" of social products. These aim to improve life in society as a whole by bringing more information and knowledge to the population in a different, often playful way, using creative selling and marketing promotion techniques, making actions more effective.

Deep down, private organizations have realized that their real role in society is not only to generate jobs and income, but also to be an important actor of social change because of their symbolic and real weight on the community in which they operate. They then joined governments and non-governmental organizations in the fight against poverty and inequality, using social marketing as one of their main weapons, which makes use of commercial marketing tools and techniques, but specifically designed to promote constructive behaviors that improve life in society.

The purpose of this article is to define the foundations of a research project that seeks to evaluate the impact and verification processes of social marketing actions effectively, based on both the existing theory on the subject and the practices used by professionals in their daily lives, based on the quadripolar method.

QUADRIPOLAR METHOD APPLIED TO SOCIAL MARKETING EVALUATION MODELS

Epistemological Pole: The Search for Improving Social Marketing Evaluation Methods

Over the years, several researchers have endeavored to come up with a model for evaluating social marketing actions that would be able to effectively demonstrate the results obtained by applying them. This is perfectly understandable by the very nature of social marketing, which comes from traditional (commercial) marketing, a business practice aimed at optimizing (mainly financial) results, which has the return of investment (ROI) as a guideline for verifying the success of an investment by a company.

The fact is that despite the efforts of various authors, until today it has not been possible to reach a model of evaluation of social marketing actions that was commonly accepted by the

vast majority of the market. This shows us that the epistemological research on the subject is still in progress, as each new proposal that emerges shows us in fact that the subject is still being questioned and that there are gaps in interpretation about it (which reflects in its practical application). These can only be resolved by the uninterrupted self-questioning imprinted by epistemology.

According to the creators of the Quadripolar Method "The epistemology thus granted, as an essential pole of research, is therefore immediately situated in both a logic of discovery and a logic of proof, the mode of production of knowledge interests him as much as his own evaluation procedures. "(DE BRUYNE; HERMAN; DE SCHOUTEETE, 1974: 19). Thus, the research project has as one of its aims to continue the exercise of epistemological reflection on the study of methods of evaluation of social marketing actions, checking the models used to verify their efficiency, as well as their usefulness. From this analysis it is intended to broaden the knowledge on the subject, with a view to optimizing the planned and executed actions.

Starting from the study of models already developed and tried, and the practices used by professionals in the field, it is intended to scientifically identify the gaps that were not considered by previous authors during the process of creating templates, so that the way to evaluate these marketing actions that are so important for a better social development can be improved.

Thus, the idea of the study to be developed aims to continue the work that has been done for years by researchers and social marketing professionals. Since science is not something absolute, composed of infinite truths, it is intended to contribute to the development of a satisfactory method that measures the real value of social marketing actions efficiently and consistently. According to the Belgian authors "A problem, the set of problems and their conditions of appearance, is better solved, formulated and explained the more it is determined" (DE BRUYNE; HERMAN; DE SCHOUTEETE, 1974: 19).

Research development will be guided by Edgar Morin's paradigm of complexity. Now, social marketing actions are based on relationships between people and the whole sociological context that surrounds them. As we know the study of social sciences is based on the subjective, everything that is rationalizable and especially what is not, that is, a web of complex relationships that cannot be reduced and imputed to a behavior common to all, by the simple fact that human beings do not necessarily react in the same way to the same stimulus.

In the last centuries much of the development of scientific knowledge was guided by the path of the simplification paradigm, trying to understand the natural and social phenomena from the reduction of the complex to the simple. In other words, instead of trying to understand how phenomena happened within a system that involved several variables and factors, we tried to isolate elements of this conjuncture, to examine them separately, as if the unit functioned separately from the whole. In the words of Edgar Morin (2008: 20).

What is complexity? At first glance complexity is a fabric (complexus: what is woven together) of inseparably associated heterogeneous constituents: it puts the paradox of the one and the multiple. In the second approach, complexity is effectively the fabric of events, actions, which constitute our phenomenal world.

Social marketing actions are involved precisely in contexts that follow this concept, of the union of a series of apparently independent factors in the same fabric, which together form one thing, with a dynamic of its own, but separated have different characteristics and behaviors.

In the previous study of the social marketing actions evaluation models, it is noted that they list relevant evaluation topics in an isolated way, that is, they define indicators, but without relating them in the context of the "fabric" in which they are located. Existing models follow the logic of simplification, they try to evaluate social marketing actions from indicators isolatedly, as if they were not part of something more complex, or yet, as if the actual reading of the data that these items provide was not richer and more reliable if one considered its relationship with the other elements of the evaluation. This complex social context is precisely the major vector that influences the achievement of research results, and therefore has to be considered in an evaluation model, which does not occur today.

"We have to face the anthroposocial complexity and not dissolve it or hide it" (Morin, Edgar, 2008: 21). That is, the evaluation models of social marketing projects have to consider the complexity of the situations in which they are inserted, and then propose a way of evaluation that is relevant. It has to be a model that takes into account the social context from which actions apply and then defines the best means of assessing their impact, as well as their indicators. You can't have a ready-made formula that always applies the same way for all cases. Each "fabric" asks for its own means of assessment; all social dynamics cannot be reduced to the same predefined indicators. For example, a campaign against smoking may have different assessment elements from one location to another, depending on the culture and customs of each case.

Understanding the complexity of social relationships and how social problems are framed in each context is critical to program success and social marketing evaluations. A project on the same subject may require different actions and planning depending on the social context, which is why I chose to work with the complexity paradigm during the research to increase the chances of reaching an evaluation model that is based on the correct analysis of each situation and its specificities.

Theoretical pole: social marketing, its specificities and forms of evaluation

As we have seen at the epistemological pole, social marketing actions are inserted in a context of complex social and interpersonal relations, which involves several factors, which "to worsen it" varies according to the application scenario. Such a heterogeneous universe, where there is no fixed base of references that is repeated in all cases, leads us to a known and unsolved problem, which is the object of study of the research that is intended to be developed, which is: the difficulty of measuring and evaluating the effectiveness of social marketing actions consistently.

For this study we have as a starting question: How can you design an evaluation of social marketing projects that takes into account the particularities relevant to each reality in which it operates? Or: How to evaluate social marketing projects without using a single template for all situations in which they are applied?

The hypothesis is that all social marketing actions cannot be evaluated using the same metrics in all cases. It is necessary to establish different forms of assessment, according to each case, composed of a different mix of techniques so that one can have a real idea of the impact and the results obtained.

Social Marketing

Social Marketing is a strand of Commercial (or traditional) Marketing and how it adopts the classic principles of 4P's of marketing, adapted for application within the context of social change. That is, we use the tactics and strategies already established in the commercialization of commercial products and services, but with the purpose of promoting ideas and behaviors that benefit society as a whole. This logic is best exemplified by Kotler and Lee:

> Social marketers, like their commercial marketing colleagues, use the four Ps - product, price, distribution, and communication - to encourage buying or adopting behaviors. They increase the attractiveness of behavior and sometimes offer goods or services to support the behavior (product); they change the price or cost of one behavior relative to another (price); they make it easy to move on to the new behavior (distribution); and they promote the benefits of new behavior in short and long term (communication) (2010, p.70).

Since marketing is effectively used to stimulate sales of virtually any product or service, why not also use it to "market" an idea or behavior? After all, trying to persuade someone to behave over another in the background is a sale (and one of the most difficult). The person has a "product" that he often uses, he likes it, he knows how it works, and what needs it meets, so

replacing it with another is a difficult task, whose help from social marketing can be crucial. Basically what needs to be done is to show the audience targeted that the benefits of adopting the new behavior that is being "sold" surpasses those provided by the current one.

Commercial and social marketing share the same basis, their own conceptual definitions already give an idea of the existing close relationship between the two conceptions. For the American Marketing Association (AMA), marketing can be defined as "An organizational function and set of processes to create, communicate and deliver value to customers and to manage value with them, in a way that benefits the organization and its stakeholders. "

While among the various definitions for social marketing we can highlight Bill Smith's (apud KOTLER and LEE, 2011, p. 26), which says:

> Social marketing is the application of commercial marketing technologies to the analysis, planning, execution and evaluation of programs designed to influence the voluntary behavior of audiences to improve their personal and societal well-being. / in order to improve your personal well-being and that of your society.

As we can see, despite the similarities, the quotation above shows us the key differentiating factor between these two concepts. The main purpose of selling in social marketing is not to financially benefit the organization promoting a particular product (commercial marketing objective), but rather the society, i.e. the success of "marketing" social marketing is in generating new behavior that is beneficial to everyone, and does not involve financial gain.

We can also talk about a version of a more humanistic conception on the subject. According to Zenone (2006, p.23):

> [...] social marketing is an ethical commitment to the community, the region and the country in which the company operates. Institutions that practice social actions seeking only to add value to the brand are using a form of institutional marketing.

Even with this "human" difference, geared toward a noble goal, social marketing shares a number of other characteristics with commercial marketing that are indispensable for its actions, meaning that the two conceptions have much more similarities than differences. They make use of, for example, the same techniques and strategic principles during action planning in order to execute, measure and evaluate activities and results in the right way.

From the authors (KOTLER and LEE, 2011), we can consider that:

● Both cases seek greater return on resource investment;

● Focus on the customer: Actions are always designed to solve a problem the public has, or to satisfy a desire or need;

●	Exchange theory is fundamental: the public has to "see" equal or greater benefits from the product offered to the existing one;

●	Marketing research has to be present throughout the process: only in this way is it possible to identify the needs, wants, beliefs and attitudes of the target audience;

●	Segmented audiences: Strategies have to address the specific needs and wants of each audience;

●	All 4 Ps (Product, Promotion, Price and Market Square) are taken into consideration: The marketing mix will only be effective if there is an integrated approach that uses all available resources;

●	Results are measured and used for improvement: Feedback is extremely important for evolving processes and actions.

On the other hand, as stated earlier, the two marketing practices do present some fundamental differences between them, which are:

●	Type of product sold: For commercial marketing this process is fundamentally about selling products and services. Now, for social marketing, this process is focused on selling desired behavior to a specific audience;

●	Different goals: While commercial marketing aims at financial gain, social marketing aims at society's gain;

●	Different criteria for choosing the market: Commercial marketing chooses the segments with the highest volume of profitable sales, while social marketing opts for segments taking into account the predominance of the social problem, ability to reach the public, acceptance of change. among others;

●	Competitors are of different natures: whereas what commercial marketing has as competitors companies that offer goods and services similar to theirs, social marketing has as competitors the current behaviors of their target audience (and the benefits derived from them) and the organizations that perhaps may promote these behaviors (eg, companies that sell alcohol).

Having defined the similarities and differences between social and commercial marketing, we can dig a little deeper into reading the top five fundamentals of social marketing. The most important of these is the focus on behaviors, as we know social marketing is aimed at selling themselves, so all planned actions should aim to promote acceptance of new behavior; or the rejection of an unwanted behavior; or the modification of a current behavior; or the abandonment of an old and undesirable behavior.

Another important point is to recognize that the change in behavior is usually voluntary, that is, as we are dealing with ways of acting that are rooted in people's values and beliefs, the success of a social marketing plan will ultimately depend on the willingness of the target audience in wanting to change habits. That is why social marketing projects need to make an thorough internal and external analysis before defining strategies, because only in this way you can identify it according to the public profile, which strategies and tactics can assist the responsible professional in "selling" a particular behavior, without being so held hostage only by voluntary acceptance by the audience.

This is only possible if the third foundation of social marketing is adopted, which is to use traditional marketing principles and techniques. Even with the differences already mentioned between the two practices, the success of social marketing depends on the classic spine, consisting of the project orientation overview for the client; definition of the correct target markets; determination of clear goals and objectives and consequently the positioning; designing an appropriate marketing mix; and monitoring and evaluating strategies to achieve the expected results.

Among the points mentioned in the previous paragraph one stands out as a fundamental element of social marketing also, which is to select and influence different target markets within the same project. It is very common (one can say almost always) to have different audience segments within the same social marketing campaign, so to promote a certain behavior within this universe it is essential to identify who these segments are, so that the message can be worked out properly for each of them. Different groups deal differently with the same situation, so identifying them is crucial to increase the chances of success. Working the same communication and actions with the same language for everyone is a serious mistake, which should be avoided as much as possible.

Finally, we have the last fundamental characteristic of social marketing which is to always define the beneficiary as the individual, group or society as a whole. This characteristic has been mentioned before, but we must emphasize it because it, together with the "sale" of a behavior and not a product, are the two main points that give identity and differentiate social marketing from other practices of the same nature.

Even following the principles of planning already established by commercial marketing, there is a point that is still critical for the consolidation of social marketing practices which is the measurement and evaluation of their actions, in order to prove their results, as well as the real effectiveness of its application. As well as in every investment made in communication and marketing, sponsors have the need (and the right) to see if the efforts made are really working. This is a common problem for professionals working in this area, and in the case of social

marketing it is even more evident since the subjective context of its performance is predominant, which makes the evaluation even more difficult.

Evaluating social marketing actions is an even more important issue because of their nature of promoting social welfare and their purpose of improving living conditions in society. Thus, it is even more indispensable to have means to verify its effectiveness.

Although there are some theories on this topic, such as the proposal "Impact of Ethics" by Kotler and Roberto (1992), or the one called "Results and Processes", Kotler, Roberto and Lee (2002), or finally the option proposed by Weinreich (1999), the fact is that there is no unanimous evaluation method within this subject, which is a relevant finding and forms an important field of social investigation.

Case study

Since it is intended to prove that the application of social marketing techniques and their forms of evaluation must be specific to each case, it makes the analysis via Case Study an appropriate option for the purpose of the research. This theory of analysis seeks to analyze complex contexts separately in a qualitative manner, which is precisely the purpose of this paper, that is, it seeks to evaluate the quality of social marketing actions separately and not the amount of successful investments.

According to MARTINS and THEÓPHILO (2009: 162) "The Case Study research strategy calls for qualitative evaluation, because its objective is the study of a social unit that is deeply and intensely analyzed." Now, if the purpose of the research is to evaluate the effectiveness of social marketing actions from the unique social context in which they apply, there is nothing better than using Case Study theory. It works with the analysis of independent complex social situations, that have their own dynamics and actors, not necessarily extendable to other situations that even if similar, they are not alike.

Technical Pole: Defining Information Collection Tools

According to what was defined and explained in the epistemological and theoretical poles, the main focus of the research is to verify the effectiveness of social marketing projects, by analyzing and studying the results and impacts of campaigns done, as well as the evaluation models already created for the theme.

The research will have two main axes, one concerns the search for information on cases already put into practice, their results and forms of evaluation applied through case studies of social marketing. The other axis corresponds to the study of methodologies already created by other authors, to check if they are used on a daily basis, that is, if it has practical applicability. Primary and secondary information will be used.

The bottom line is whether the theory applies to practice and, most importantly, whether it works, generates results, contributes positively to the success of a social marketing project. The techniques and strategies that will be used to collect information are:

Research Strategies

Bibliographic Search

The evaluation models of social marketing campaigns developed by different authors will be analyzed. In order to be able to make a correct analysis of existing models, and to try to propose improvements if necessary, it is essential first of all to know the proposals already prepared. Only through bibliographic research can one have an exact notion of how the scholars of the subject have been treating it, and what is its level of maturity.

2.3.1.2 Outcome Evaluation Survey (case study)

One of the ways to verify the effectiveness of social marketing campaigns is to logically research the results obtained by them. Due to the difficulty of obtaining data directly from the organizations on the results, the analysis will be done by reading social marketing case studies. Thus it is intended to verify the effectiveness of the actions employed.

Process Evaluation Survey (case study)

Also through the case study it is intended to verify which evaluation methods are used in social marketing projects and if they are sufficient and relevant to measure the effectiveness of actions. The information collected in this research will help to better understand the practical universe of social marketing evaluations, as well as provide suggestions for improvement of the methods used for this purpose.

Data Collection, Information and Evidence Techniques

Documentary Research

This type of research will be critical to assist with case study analysis. Through reports, studies and evaluations that integrate the context of a situation where social marketing was applied is intended to have a reliable overview of its effects and effectiveness.

Interviews

The interview will be a resource used to gain a better insight into how social marketers (technicians and managers) view the execution of the projects they conduct and most importantly, how they manage and how they evaluate the processes for evaluating their products. same. The

interview will also be used to capture the perception of the impact of social marketing actions by representatives of the communities where they are applied. The objective is to obtain a broad perception from the opinions of the main parties involved in the projects, achievers and beneficiaries.

Social and Attitude Scales

This technique will be used to complement the information to be obtained from the interviews of those involved in social marketing actions. It is intended to verify the intensity of agreement and disapproval on certain topics by these individuals, and thus identify the strengths and weaknesses to be addressed in improving social marketing evaluation models.

Content Analysis

The content analysis will be complementary to the documentary, it will be performed in order to verify if the messages used in social marketing campaigns are in line with the defined objectives, planned and obtained results. This type of analysis seeks first of all to verify if the message that was used in practice (in its various forms of application) is really pertinent to the project objectives, so it is intended to analyze with this technique to complement the effectiveness of correctly planned and executed campaigns. In addition, the objective is to verify if the correct implementation of this content is also included in the results evaluation processes.

Morphological pole: presentation of the results obtained and materials to be generated by the research.

In view of the research objective which is to measure the effectiveness of social marketing actions and the evaluation models designed for the theme, it is intended to produce an evaluation report of the case studies that will be studied, indicating which are the main factors that effectively influence in a social marketing project. It is intended to produce a document that aggregates all the knowledge learned in the study in question, that helps professionals involved with the subject in dealing with the recurring problems of the difficulty of proving the effectiveness of social marketing actions.

The material will be the materialization of a research based on the existing theory (starting point), incremented by a complementary interpretation of real cases, which aims to bring new contributions to the practice of social marketing, thus contributing to its consolidation. It is not intended to bring absolute truths regarding campaign results verification, just a contribution of how these projects can be better evaluated.

In addition to the campaign case study evaluation report, another important document that will be produced will be an analysis of Social Marketing Campaign Measurement Models and

Techniques, both those cited in the literature and those used in everyday life (it cannot be stated beforehand that the academic models are also used in reality).

From this analysis a third document will be generated, which can be a good practice manual for evaluating the effectiveness of social marketing projects, or even a new evaluation model generated from theory, but built in partnership with the practices actually used.

The production of all these documents will embody, synthesize methodologically and make public all the research work developed. In other words, they will give a real and final form to the content so that it is accessible to everyone, according to the creators of the Quadripolar Method. "In fact, it is not up to the morphological pole to comment on test questions, to want to provide a protocol that allows empirical proof." This is the role of theory. The morphological pole is solely responsible for the methodological function of providing an architectural configuration (DE BRUYNE; HERMAN; DE SCHOUTEETE, 1974: 162).

FINAL CONSIDERATIONS

Using the quadripolar method for planning social science research is both challenging and exciting. The dynamics that the method proposes, totally different from the positivist logic of the natural sciences, opens the horizons of thinking about how to do science in a new way, suited to the reality of the social sciences.

Understanding the importance of the epistemological pole for the development of scientific studies is fundamental for the correct development of the other poles that surround it. Its solid concept of critical vigilance to the work of science that lays the groundwork for research projects ensures a safe distance from common sense without completely ignoring it, facilitating the differentiation between what is the origin of the problem studied and what one should seek to define as a scientific object of study.

Under this strong concept imposed by the epistemological pole, the theoretical, technical and morphological poles interact almost in an organic way, thus defining the theories, the ways of collecting data and exposing the information, and the conclusions produced by a given scientific work. The "non-plastered" proposal (we can say "interactive pole") of the Quadripolar Method allows the formatting of a project in a gradual and complementary way, where the work is does not get lost when some direction is changed, it is only readjusted between its poles. From this concept, we can say that a scientific project is well structured when there is a balance between all poles, a "perfect condition" that can only be achieved with the managerial work of the researcher who conducts the research.

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