Tailoring Messages 101

The Art and Science of Writing Tailored Messages

PART 1: What is Tailoring?

Definition of Tailoring

The term “tailoring” refers to a process that consists of:

1. an assessment of individual characteristics relevant to the behavior;
2. algorithms that use the assessment data to generate intervention messages relevant to the specific needs of the user; and
3. a feedback protocol that delivers these messages to the user in a clear, vivid format.

Michigan Tailoring System

Overview

1. What is Tailoring?
   - Definition, Goals, Strategies (Personalization, Feedback, Adaptation)
2. What to Personalize, Feed Back, and Adapt
   - Potential variables
3. Tailoring Depth
4. Using Contextualization in Tailoring
   - Enhancing the effects of tailoring strategies
5. Developing Message Concepts

2 Goals of Tailoring

Enhance Message Impact

- Employ theoretical constructs thought to directly influence behavioral intention on mediators, such as:
  - Self-efficacy
  - Attitudes/Outcome expectations
  - Normative perceptions

Influence Information Processing

- Grab attention
- Engage effortful processing
- Elicit self-reference
- Evoke peripheral processing
- Create emotional response
3 Strategies To Reach Tailoring Goals

1. Personalization
2. Feedback
3. Content Matching (Adaptation)

Feedback

Acknowledges and/or responds to information provided by or about participants.

1. Descriptive
   You told us that you are pretty stressed right now and the best way for you to manage stress is to meditate.
2. Comparative
   You're eating 2 more servings of vegetables per day than when you first enrolled in the program.
3. Evaluative

Content Matching/Adaptation

Provides information addressing individuals' status on key behavioral determinants for the purpose of enhancing their motivation or ability to change.

KEY CONCEPT: Content Matching strategies seek to minimize the "search for information process".

Content Matching – Smoking Barrier Example

Smoking Barrier – Driving
You are worried about smoking when driving. Here are some ideas to help:
- Take new routes to work and avoid passing places where you used to buy cigarettes.
- Consider carpooling or using public transportation for a while.
- Remove all cigarettes, butts, the ashtray and lighter from your car. Clean it and get the interior detailed so that everything is clean and fresh.
- Fill your glove box with gum and lollipops.

Smoking Barrier – Stress
You are worried about smoking when under stress. Here are ideas to help:
- Don't fight with your wife. Since both of you are trying to quit, you will each go through many stressful feelings. Be honest with each other about how you feel. Support each other and both of you can avoid lighting up.
- Keep up your great workout schedule! Exercise produces endorphins, which naturally relieve pain and make you feel good.
- Since you like to journal when you feel stressed, give yourself time to do this as often as you need to.

Content Matching - Need for Cognition

High Need for Cognition
Use the spaces below to write down a few ways in which eating fruit and vegetables may affect the things you value. We've provided one example:

Being a good parent makes me a role model for my children. When I eat healthy I'm able to set a good example for my kids.

Low Need for Cognition
Take a look at the list below to see how other people have made a connection between their values and eating better:

- Being a good parent makes me a role model for my children. When I eat healthy I'm able to set a good example for my kids.
- When I eat meals full of fruit and vegetables I get important nutrients that help decrease my chance of getting sick.
- By cooking healthy meals in creative ways, I can eat well and get in touch with my artistic side at the same time.
Content Matching – Testimonial Example

Testimonial matched to – Barrier, Gender, and Geography.

I was all ready to start adding more fruit and vegetables to my diet. But, picking out the freshest pineapple or the crispest cucumber was out of my league. When trying to figure out what to buy, I learned that my local grocer can be a great help. They can show you how to choose the top produce and tell you what's in season to get the best deal. I now feel comfortable picking out fruit and vegetables that I know will taste great.

— Anthony, Flint

Combining all 3 Strategies

Introduction

Now that you have your quit date, strategies on how to prepare, and are ready to move forward. Based on what we learned about your in your survey, we want to go over an area that may cause you the most trouble as you get ready to quit.

The images on the top of the page highlight specific topics within this area; in various colors, based on how much of a challenge you think they will be for you. It may help to look at the program at times. If this topic you also

What Should You Tailor On?

To help determine appropriate tailoring variables, use:

- Program objectives
- Relevant literature
- Appropriate theoretical constructs
- Audience research

Potential Variables for Personalization, Feedback, and Adaptation

Variables from Theoretical Constructs (just to name a few):

- Outcome Expectancies/Attitudes
- Self-Efficacy
- Intrinsic/Extrinsic Motivation
- Risk Perception/Perceived Threat of Illness
- Decisional Balance - Advantages and Disadvantages of Changing Behavior
- Perceived Benefits
- Perceived Barriers
- Stage-of-Change
- Perceived Social Norms
- Observational Learning (Modeling)
Potential Variables for Personalization, Feedback, and Adaptation

Moderators (just to name a few):
- Locus of Control
- Need for Cognition
- Blunting vs. Monitoring
- Stress/Coping Levels
- Values
- Culturally based constructs (ie: religion, ethnic identity)
- Social Networks/Social Support
- Central vs. Peripheral Processing
- Other Behaviors that Influence/Impact Behavior (ie: smoking/drinking)
- Background of Behavior (ie: # of cigs, past quit attempts, yrs smoked, etc.)
- Hobbies, Routines, Interests

Demographics (just to name a few):
- Age
- Gender
- Race/Ethnicity
- Living environment (single, relationship, children, roommates, etc.)
- Education
- Employment Status (employed, student, homemaker, retired, etc.)
- Height and Weight
- Location (urban, suburban, rural)
- Health Insurance Status
- Health History (personal and family)
- Literacy/Reading Level

Tailoring depth refers to the degree to which assessment data and connections among data have been utilized to produce the message.

Light/Shallow/Block Tailoring: at the story or paragraph level; tailoring primarily limited to individual relevance and personalization.

High/Deep/Micro Tailoring: down to words and sentence fragments; tailoring includes personalization, relevance, and intimacy-based tailoring (life-style, comprehension, psychosocial).

PART 3: To What Level Should You Personalize, Feed Back and Adapt?

Low vs. High Tailored Messages

Low Tailored Message
Martha, you are motivated to quit because of your health. Did you know:
- Life expectancy among women who quit smoking around age 35 exceeds that of continuing smokers by 6.1 to 7.7 years. Among women who quit at age 65, they gain 2.7 to 3.7 years of life.
- Women who quit smoking reach menopause at an age similar to women who have never smoked. Women who continue to smoke reach menopause one to two years early.

High Tailored Message
Martha, it’s really important to you to quit for your health. Let’s briefly look at how quitting might impact your current health:
- High cholesterol - quitting may increase your HDL (good) cholesterol.
- Diabetes - since smoking raises your blood glucose level, quitting may make it easier to control your diabetes.
- Women who quit smoking before trying to get pregnant are as likely to get pregnant as women who have never smoked.

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Low Tailored Message
Once you quit, you feel that you might be tempted to light up when you’re feeling stressed. Being able to manage stress is a valuable skill to have. We want to help you make sure that cigarettes are no longer a stress “solution” you want to reach for.

This section of your program provides valuable resources and healthy ways to help you cope with a variety of things life may throw at you.

High Tailored Message
When you rated the triggers that might tempt you to light up once you quit, stress was at the top of your list. You also told us that you have a lot of stress in your life right now and that you don’t always cope with it very well.

Based on this, you may want to spend a little extra time in this section of your program. It highlights many ways to manage stress that fit well with both your work and family life.
Low vs. High Tailored Messages

Low Tailored Images
High Tailored Images

PART 4 – Using Contextualization to Enhance Messages

Contextualization
- Contextualization involves messages NOT directly related to the primary target variable.
- Contextualizing content based on survey responses builds…

Relevance/Rapport

Message Processing/Elaboration

Behavior Change

Contextualization – Project Quit Example
- Matching Testimonial Characters to Participants -
- 6 tailored web sessions + many email messages
- 10-week nicotine patch therapy given to all participants
- Sessions included didactic information + stories.
- Stories were told by a hypothetical character who “matched” the participant’s smoking profile.
- Hypothetical character stories contained photos of the character that were visually “matched” to the participant by age, gender, race.

Project Quit – Smoking Cessation

Demographics used for tailoring images:

Age
- Younger
- Older

Gender
- Male
- Female

Race
- Asian
- Black
- Hispanic
- Middle Eastern
- White

Project Quit – Smoking Cessation
Contextualization – Eat for Life Example

- Ethnic Identity -

- 3 Tailored Print Newsletters mailed to participants’ homes.
- Ethnic Identity: The extent to which individuals identify with psychologically, and gravitate socially and behaviorally, to their racial/ethnic group.
- 5 Core Identity Types: Assimilated, Black American, Afrocentric, Bicultural, and Multicultural.
- 16 total Identity Types: combinations of the 5 core types along with cultural mistrust classification for some types.

Eat for Life – Ethnic Identity

Afrocentric
Have you ever wondered why Africans have lower rates of obesity, diabetes, high blood pressure, and cancer than African Americans? Researchers credit the lower rates of these diseases in parts of Africa to the traditional diets of many African cultures, which are rich in fruit and vegetables.

Black American with Cultural Mistrust
You may already know that Black Americans have higher rates of diabetes, heart disease, high blood pressure, and cancer than Whites. This reflects the continuing legacy of the negative impact of slavery, segregation, and social injustice.

Assimilated
You may already know that Americans have a higher risk of diabetes, heart disease, high blood pressure, and cancer if they don’t eat a healthy diet. Americans are doing better with their health, but there is still a lot of room for improvement.

Inspirational Quote Selections:

Afrocentric: African proverbs, Marcus Garvey
Assimilated: John F. Kennedy, Helen Keller
Bicultural: Oprah Winfrey, Marian Wright Edelman
Black American: Booker T. Washington, Jesse Jackson, James Baldwin
Multicultural: Mahatma Gandhi, Cesar Chavez, Nelson Mandela

PART 5 – Developing Message Concepts

- Message concepts are the detailed ideas about
  - what you want to say in each “message”
  - how you want to say it.
- Concepts are best created in group brainstorms.

Now that you have a lot of ideas on what to tailor on…
Message Concepts

- Take your blueprint (program outline) and your tailoring variables (survey)...
  - Sketch out each tailored component of your program (1 web program consisting of 4 web pages)
  - Sketch out each “page” of component (web page 4)
  - Sketch out each “section” of each page (web page, 4, Testimonial text section).

- For each Section, describe:
  - Location (top left corner; box around text [and image])
  - Topic (perceived barrier)
  - Objective (demonstrate possibility to change through modeling of someone similar to them)
  - Style (friendly, peer-to-peer tone)
  - Length (2 paragraphs, 3-4 sentences per paragraph)
  - Tailoring variables (top barrier, home demographics, gender, age, lifestyle habits)

An Example Message Concept, cont.

- Page concept of webpage 3 of program, all 4 sections: (1) testimonial text, (2) testimonial image, (3) didactic education, (4) true/false text.

Styles/Formats for Message Concepts

- Serious vs. Light and Fun
- Basic Didactic Information
- Advice Column
- Testimonial
- Q&A
- True/False
- Self-scoring Interactive Quiz
- Graphics and Illustrations
- Bullet Points
- Call Out
- From Expert/From Peer
- Text/Audio/Video

Example of How To Vary Styles/Format

The health risks of smokeless tobacco use could be presented as:
- a list of medical facts
- a dialogue between a doctor and patient
- a testimonial from a victim of mouth cancer
- an advice column with advice written by a “peer”

Variation in format from one message section to another is important in order to maintain reader interest and acceptability.

GROUP WORK TIME

So far, you have worked together to:
1. Select a health issue
2. Create an outline/framework (blueprint)
3. Determine assessment measures for tailoring and outcomes

Now you will:
4. Design feedback
   - break down the program into its specific component parts
   - develop important details about each component
What You Will Need

• Your completed Outline Worksheet
• Your completed (but possibly about to be updated) Survey Worksheet
• The blank Define Your Message – Message Worksheet
  • also take out the completed Project Quit and SleepWell message worksheets
to use as guides