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MH Navigation tool marketing (and nudge) strategy work plan

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Deliverable Three

Prepared by:

Prof Rebekah Russell-Bennett and Prof Uwe Dulleck, Faculty of Business Government and Law
Rob Hudson, Spoutlogic, Health marketing consultant:

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Author(s)	Rob Hudson (RH)	Spoutlogic
Reviewer(s)	Prof Rebekah Russell-Bennett (RRB) Prof Uwe Dulleck, (UD)	University of Canberra University of Canberra

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For any inquiries regarding the content or permissions, please contact: Prof Rebekah Russell-Bennett rebekah.russell-bennett@canberra.edu.au

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1.0 EXECUTIVE SUMMARY

The marketing plan for MChart outlines a comprehensive strategy to position the platform as a transformative tool in mental health planning. Designed with insights from behavioural frameworks and practical marketing principles, this plan balances theoretical underpinnings with actionable steps to drive awareness, adoption, and retention across Primary Health Networks (PHNs), Local Health Districts (LHDs), and Mental Health Commissions (MHCs).

In a market saturated with over 100 navigation tools, MChart addresses a critical gap by delivering a platform tailored specifically for planners. Leveraging its advanced features, such as geographic mapping, cost-benefit analytics, and customisable dashboards, MChart empowers users to overcome challenges tied to outdated systems, fragmented data, and resource constraints. The platform's design ensures seamless integration into existing workflows, minimising disruption while maximising utility.

The marketing strategy applies established behavioural and decision-making frameworks, such as the EAST Framework and the MOA Framework, to influence stakeholder engagement. These models help simplify adoption, showcase tangible benefits, and align marketing efforts with decision-making cycles, addressing known biases and resistance to change. This behavioural design approach is also informed by the Resistance to Innovation Framework (Kleijnen et al., 2009), which identifies common psychological and structural barriers; such as habit, perceived complexity, and uncertainty - that MChart directly mitigates through assisted trials, peer validation, and seamless integration. Additionally, the Media Purpose Quadrant Model ensures resources are allocated effectively, balancing brand-building efforts with targeted performance campaigns.

Key elements of the plan include:

- **A Multi-Channel Approach:** A digital-first strategy encompassing branding, a robust web presence, social media, SEO, email campaigns, and PR to create a cohesive brand narrative.
- **Data-Driven Execution:** Emphasising analytics to measure impact, refine strategies, and demonstrate ROI at every stage of the funnel.
- **Audience-Specific Messaging:** Tailored content for PHNs, LHDs, and MHCs to address their unique pain points and value propositions.
- **Future-Proof Branding:** Recognising the need for a broader brand identity beyond "mental health" to support long-term growth and sector expansion.

These value propositions and operational models align with Holbrook's (2006) Customer Value Framework, ensuring that MChart addresses not only the functional needs of planners, such as efficiency and usability - but also their experiential and symbolic values, including trust, credibility, and the professional significance of improved planning outcomes. While the framework is not applied explicitly, its principles are reflected in the practitioner-focused structures of the MOA and EAST models. This alignment ensures that academic theory is translated into practical strategies that support effective and commercially viable implementation.

The plan also highlights the importance of front-of-mind recall, ensuring that MChart is the default solution for mental health planners when challenges arise. Through a phased roadmap—starting with a targeted ACT pilot and scaling to a national rollout and adjacent sector expansion—MChart aims to establish itself as the premier planning platform, delivering measurable improvements in resource allocation, planning efficiency, and systemic outcomes. By blending behavioural theory with practical marketing tactics, this strategy positions MChart for sustained success in a complex and competitive market.

2.0 INTRODUCTION

Purpose

This marketing plan outlines the strategic direction for positioning MChart as a transformative tool in mental health planning. The plan highlights the critical need for MChart to address the inefficiencies of fragmented systems and introduces clear goals to guide adoption and growth.

Scope

The plan focuses on strategic frameworks and tailored messaging for diverse audiences, ensuring alignment with planners' needs and expectations. While the document provides a comprehensive guide to marketing MChart effectively, the plan excludes detailed tactics and budgetary considerations, allowing for adaptability as insights emerge.

A substantial body has informed the development of the M-Chart marketing plan of research, strategic frameworks, and stakeholder insights. The plan integrates insights from stakeholder meetings, ensuring alignment with industry expectations and funding priorities. Supporting research into behavioural nudges, choice architecture, and marketing orientation models has further refined the strategic approach. Additionally, media channel evaluations and internal references, including platform evaluations, provide essential guidance on engagement strategies and market positioning.

Background

Australia's mental health planning system faces significant challenges due to siloed processes and limited access to integrated tools. These inefficiencies result in suboptimal resource allocation, outdated decision-making frameworks, and barriers to collaboration. MChart addresses these challenges by offering a user-friendly platform designed for planners, leveraging real-time data and intuitive features to streamline mental health service planning.

MCHART

Objectives

MChart's marketing strategy is built to:

- Address planners' pain points by providing a comprehensive and customisable navigation tool.
- Ensure readiness for a national rollout by leveraging insights from an ACT-based pilot program.
- Overcome resistance to change by showcasing MChart's unique value propositions and seamless integration into existing workflows.
- Achieve a 20% adoption rate among ACT planners during the pilot phase as a foundation for broader adoption.

Document Audience

This marketing strategy is intended as a go-to-market plan for the team developing MChart, providing a structured approach to building awareness, driving adoption, and achieving market penetration. Additionally, the content and messaging frameworks outlined within this plan can serve as tools for stakeholders and prospects. By understanding the purpose and benefits of MChart, these audiences can effectively communicate its value to their networks, amplifying the platform's reach and impact. This dual-purpose approach ensures the strategy supports both direct marketing efforts and broader advocacy for MChart's adoption.

Directory of Navigation Tools

A clear Directory of Navigation Tools in Australia is essential for understanding the competitive landscape and positioning MChart effectively. Currently, marketing analysis relies on incomplete information about existing tools, which limits our ability to clearly define MChart's advantages and identify market gaps.

Creating this directory should be considered a key deliverable in the marketing of MChart. It would provide a solid foundation for comparing features, targeting our audiences, and refining our messaging. Without it, building a strong and confident marketing strategy will be much harder, especially when differentiating MChart from other platforms and addressing stakeholder concerns.

This directory would also support broader transparency across the sector and strengthen MChart's credibility as a purpose-built planning tool.

Caveats

This is a marketing plan, and as such, it prioritises consumer perception over operational reality. Service perception is shaped by how brands present themselves—meaning it may reflect marketing bias—but it still accurately represents the way users encounter and interpret information from those brands.

With its planner-focused design, co-created with end-users, and strategies grounded in behavioural insights, MChart is positioned not just as a solution but as a new standard in mental health planning. This plan serves as a roadmap to achieving these objectives, ensuring the platform's successful introduction and sustained growth.

3.0 SITUATION ANALYSIS

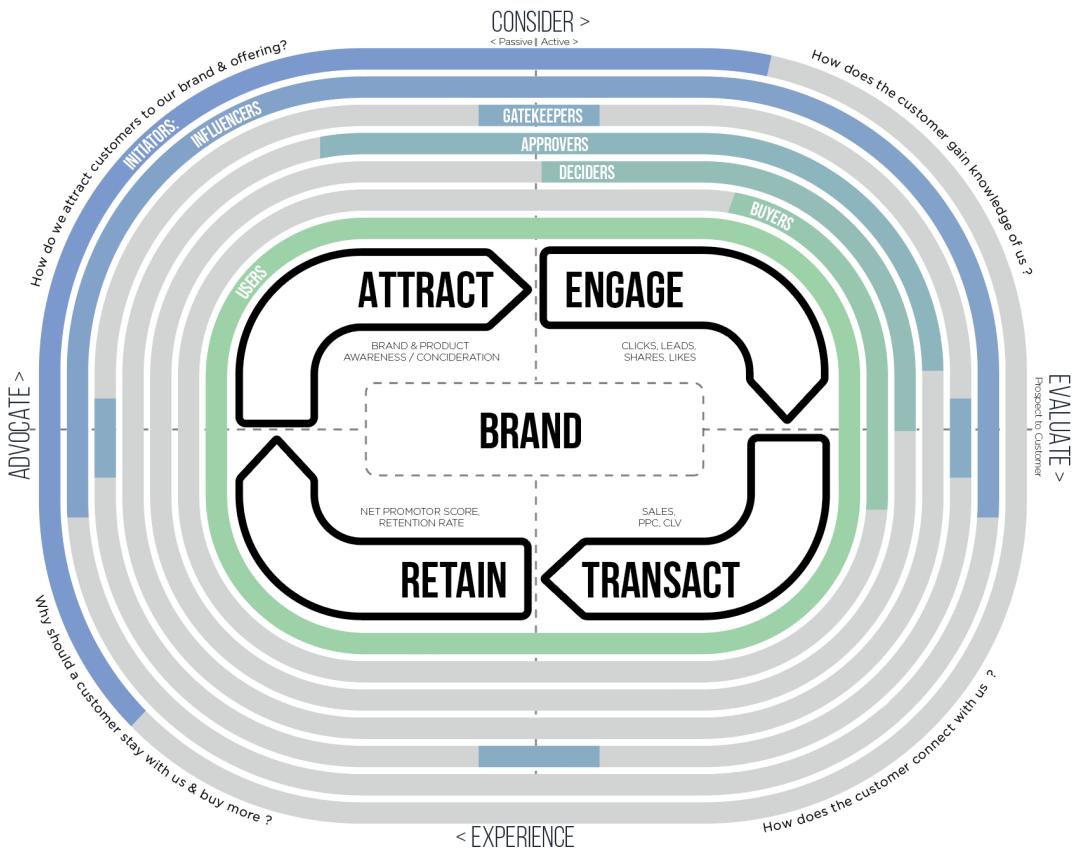
3.1 Target Market & Buying Centre Strategy

3.1.1 Buying centre:

In organisational purchasing decisions, a buying centre refers to the group of individuals involved in the decision-making process for acquiring a product or service. Unlike individual consumer decisions, buying centres are characterised by their complexity, as they often involve multiple stakeholders from different departments, each with their own priorities, expertise, and concerns. This concept is particularly relevant in organisations like PHNs, LHDs, and Mental Health Commissions, where purchasing decisions must align with operational, financial, and strategic objectives.

Key roles in buying centres typically include:

- **Initiators:** Identify the need for a solution, such as improving planning capabilities.
- **Users:** Directly interact with the product, influencing adoption based on its usability and relevance.
- **Influencers:** Provide insights or recommendations that shape the decision, often IT or operational teams evaluating integration and cost.
- **Deciders:** Hold final authority over the purchase, typically leadership or budget holders.
- **Gatekeepers:** Control access to decision-makers and information, often administrative or procurement teams.
- **Approvers:** Formally authorise the purchase after reviewing compliance with organisational policies and strategic goals.
- **Buyers:** Handle the negotiation, procurement, and contracting process, ensuring the purchase aligns with organisational budgets and requirements.



In the context of MChart, understanding the dynamics of buying centres is critical for marketing and sales strategies. For example, IT departments may resist adoption due to perceived integration challenges, while finance teams might focus on measurable ROI. Effective communication must address these varied concerns, presenting MChart as a solution that reduces workload, integrates seamlessly with existing systems, and aligns with organisational goals. Recognising and addressing these diverse priorities ensures a smoother decision-making process and increases the likelihood of adoption.

Primary Health Networks (PHNs):

PHNs are responsible for commissioning primary healthcare services to meet the specific needs of their local populations. Operating within federally determined guidelines, they play a pivotal role in shaping the accessibility and quality of healthcare in their regions. Their decision-making often hinges on robust data and tools that align with national frameworks. MChart enhances this capability by offering a modern, efficient platform that replaces outdated systems while ensuring existing workflows remain intact and operationally unchanged.

Primary Health Network Pain Points.

Mandated Tool Use and Perceived Credibility:

While PHNs are not formally mandated to use federal tools like the National Mental Health Services Planning Framework (NMHSPF), their reliance on such platforms is often driven by the need to secure federal funding or approvals. Data sourced from non-federal platforms might be perceived as less credible or less aligned with overarching policy objectives. This perception can create resistance to adopting new solutions like MChart, as PHNs may fear that using alternative tools could disadvantage their funding applications or reduce trust in their recommendations.

Siloed Systems and Organisational Resistance:

Many PHNs operate within fragmented systems where data is stored across multiple platforms, making it challenging to obtain a comprehensive view of healthcare needs. This siloing is further complicated when systems are adapted or proprietary, leading to resistance not only from end users but also from the surrounding support architecture, including IT, Operations, and Finance departments. IT entanglement resistance can be particularly significant, as these teams are often tasked with evaluating the technical and operational implications of adoption. IT teams may assign hard costs to implementation efforts, such as integration, training, and ongoing maintenance, which can outweigh the perceived potential benefits that end users might struggle to quantify. This dynamic can create a significant barrier to adoption, even if the tool

aligns with the needs of planners.

Resource and Time Constraints:

PHNs often operate under significant financial and staffing pressures, making it difficult to explore, adopt, and integrate new tools. These constraints extend to the time they are willing to commit to understanding potential platforms or engaging with marketing communications. Lengthy or overly complex messaging about new approaches can fail to resonate with PHNs. To overcome this, marketing materials need to be concise, actionable, and delivered in stages to ensure they align with PHNs' limited capacity for engagement and decision-making.

Interoperability and Implementation Effort:

Adopting a new platform like MChart is likely to require a period of trial where its functionality is tested alongside existing methods. For PHNs, this effectively doubles their workload, as they may need to maintain their old processes to ensure continuity while trialling the new tool. This added burden can exacerbate resource and time constraints, making adoption less appealing. To address this, offering an assisted trial product could significantly reduce resistance. This model would include a dedicated support team to aid PHNs during the trial period, helping with onboarding, integration, and troubleshooting. Such assistance not only alleviates the perceived resource burden but also fosters a collaborative relationship, enabling marketers to identify and address other purchase challenges as they arise.

PHNS Value Proposition.

MChart provides a significant enhancement to existing planning workflows by offering advanced insights and tools that improve decision-making without disrupting established processes. While it replaces outdated or less efficient platforms, it is designed to integrate seamlessly into current workflows, ensuring that PHNs can adopt it with minimal operational impact. This combination of innovation and compatibility makes MChart a valuable asset for planners looking to optimise their resources and outcomes.

Integrated Planning:

By consolidating fragmented data sources into a single, user-friendly platform, MChart delivers a comprehensive view of healthcare needs within a region. Its real-time geographic mapping capabilities empower PHNs to identify service gaps and allocate resources more effectively, streamlining the planning process.

Customisation and Usability:

MChart's tailored dashboards adapt to the specific needs of PHNs, ensuring the platform feels intuitive and meets their unique requirements. This high level of customisation reduces the learning curve and makes adoption easier, helping PHNs achieve their goals faster.

Minimising Implementation Friction:

Designed for compatibility with existing workflows and systems, MChart requires minimal changes to current processes. This reduces the technical and operational barriers associated with new tool adoption, making it easier for IT and operational teams to support its implementation.

Assisted Trial Offering:

Through an assisted trial program, MChart ensures that PHNs can experience its benefits while receiving dedicated support for onboarding and integration. This helps address initial concerns about resource allocation and provides opportunities to showcase the tool's effectiveness in real-world settings.

By addressing both user and organisational challenges, providing hands-on support during trials, and respecting time constraints, marketers can position MChart as a practical, indispensable tool that aligns with PHNs' goals and operational realities.

Overcoming bias

The PHNs value proposition for MChart must acknowledge and address several cognitive biases that can influence decision-making, adoption, and implementation. Below are the key biases relevant to this section:

1. Status Quo Bias

- Relevance: PHNs may be resistant to change due to a preference for familiar systems, even if MChart provides superior functionality.
- Mitigation: Position MChart as an enhancement rather than a replacement, emphasising how it integrates seamlessly with existing workflows. Highlight low disruption and ease of transition in messaging.

2. Loss Aversion

- Relevance: Decision-makers may fear the potential risks of switching to a new system more than they value its benefits, perceiving implementation effort as a cost.
- Mitigation: Offer assisted trials and side-by-side comparisons demonstrating efficiency gains. Reinforce messaging around support, training, and risk minimisation during implementation.

3. Ambiguity Aversion

- Relevance: PHNs may hesitate to adopt MChart due to uncertainty about its compatibility, effectiveness, or long-term viability.
- Mitigation: Provide clear case studies, success metrics, and testimonials from early adopters to build confidence. Offer a structured onboarding process to ensure a smooth transition.

4. Endowment Effect

- Relevance: Existing planning tools, even if outdated, may be perceived as more valuable simply because they are already in use.
- Mitigation: Demonstrate how MChart enhances existing capabilities rather than replacing them outright. Use interactive trials that allow users to experience its value firsthand.

5. Cognitive Overload & Complexity Bias

- Relevance: If PHNs perceive MChart as too complex or requiring excessive learning effort, they may delay or reject adoption.
- Mitigation: Simplify messaging around customisation and usability by focusing on intuitive dashboards, guided onboarding, and tailored experiences. Emphasise how MChart reduces planning complexity rather than adding to it.

6. Time Discounting (Hyperbolic Discounting)

- Relevance: PHNs may undervalue long-term planning benefits if short-term adoption appears resource intensive.
- Mitigation: Emphasise immediate wins—such as faster insights, improved efficiency, and quick deployment—to demonstrate rapid return on investment. Use phased adoption strategies that allow incremental integration.

Local Health Districts (LHDs)

LHDs manage regional health service delivery, focusing on operational efficiency and community outcomes. They are responsible for ensuring that resources are allocated effectively across diverse geographic areas, often balancing the needs of urban, rural, and remote populations. MChart is designed to help LHDs address these challenges by providing a comprehensive, user-friendly platform that integrates with their existing processes and enables data-driven planning and resource optimisation.

Local Health Districts Pain Points.

Complex Service Networks and Geographic Diversity:

LHDs oversee healthcare services across vast and diverse regions, often including urban centres, remote communities, and everything in between. This geographic diversity creates significant challenges in managing service delivery, as different areas often have unique and disparate needs. While federal platforms are established and widely used, they can lack the ease of use and depth of insights offered by MChart. This can limit LHDs' ability to address these diverse challenges effectively and efficiently.

Limited Resources and Staffing Across Departments:

Many LHDs operate with constrained budgets and insufficient staffing to meet the demands of comprehensive healthcare planning. This challenge extends beyond planning teams to include support services such as IT and Finance, which are often required to facilitate the adoption of new tools. These additional demands on already overburdened teams can create significant resistance to exploring and implementing new solutions.

Fragmented and Outdated Data Systems:

Data required for planning and reporting is often scattered across multiple systems, making it challenging to gain a complete and accurate picture of healthcare needs and resource availability. In many cases, this data is either outdated or lacks clear visibility into the relative age of individual data elements due to platform limitations. This reduces the effectiveness of decision-making and increases inefficiencies, leaving LHDs unable to respond quickly to emerging needs.

Resistance to Change Due to Operational Demands and Status Quo Bias:

Adopting new tools often involves a learning curve and temporary disruption to existing workflows. For LHDs, this disruption can be especially challenging, as they may struggle to justify the effort of transitioning to a new system while maintaining their current operations. Furthermore, a status quo bias among stakeholders—favouring existing processes or tools over newer, unfamiliar solutions—can amplify resistance. Without clear evidence of immediate benefits, there may be hesitation to invest in new platforms like MChart.

Local Health Districts Value Proposition.

MChart empowers LHDs to overcome these challenges by providing a flexible, intuitive, and resource-efficient platform that integrates seamlessly into their existing workflows. Designed with the specific needs of LHDs in mind, MChart delivers actionable insights that improve planning, enhance resource allocation, and streamline operations, enabling LHDs to achieve better outcomes for their communities.

Geographically Tailored Insights:

MChart's geographic mapping feature provides real-time, visually intuitive data on healthcare needs and resource allocation across diverse regions. This enables LHDs to identify service gaps and adjust resource distribution to address the unique requirements of different communities effectively.

Efficiency Through Integration:

By consolidating data from multiple sources into a single platform, MChart eliminates the inefficiencies associated with fragmented systems. This integration provides LHDs with a clear, comprehensive view of their operations, making it easier to plan, report, and make informed decisions.

Customisation for Local Needs:

MChart offers customisable dashboards that adapt to the specific requirements of each LHD. This ensures that users can access the most relevant data and tools quickly, minimising the time and effort required to use the platform.

Streamlined Implementation and Support:

MChart's design prioritises ease of adoption, with features that ensure minimal disruption to existing workflows. Additionally, an optional assisted trial program provides hands-on support during the onboarding process, addressing concerns about resource constraints and operational impacts. This support also helps uncover and address any challenges early in the adoption process.

By addressing the unique challenges faced by LHDs, MChart positions itself as an essential tool for improving operational efficiency and enhancing the impact of healthcare services across diverse regions. Its combination of innovative features, seamless integration, and tailored support ensures that LHDs can adopt the platform with confidence and achieve meaningful improvements in their planning and delivery processes.

Overcoming bias

1. Status Quo Bias

- Relevance: LHDs may be hesitant to move away from familiar systems and workflows, even if they are inefficient.
- Mitigation: Frame MChart as a complementary enhancement rather than a disruptive replacement. Emphasise seamless integration with existing workflows and tools to reduce perceived disruption.

2. Loss Aversion

- Relevance: LHDs may perceive adopting MChart as a risk, fearing potential inefficiencies or implementation difficulties more than they value its benefits.
- Mitigation: Offer an assisted trial with dedicated support, helping LHDs experience the platform's value before committing. Use case studies and ROI projections to highlight efficiency gains and risk mitigation.

3. Familiarity Bias

- Relevance: Decision-makers may favour existing platforms or methods simply because they are more familiar, even if they are less effective.
- Mitigation: Use customised dashboards to align MChart's interface with current workflows, making it feel like a natural extension rather than an entirely new system. Highlight user testimonials from LHDs that have successfully transitioned to MChart.

4. Cognitive Overload & Complexity Bias

- Relevance: LHDs manage vast amounts of data, and introducing a new tool may be seen as adding complexity rather than simplifying processes.
- Mitigation: Highlight MChart's efficiency through integration, showcasing how it consolidates multiple data sources into one platform, reducing fragmentation and workload rather than increasing it.

5. Geographic Proximity Bias

- Relevance: LHDs often prioritise local insights but may struggle with data visualisation across different regions.
- Mitigation: Leverage MChart's geographically tailored insights to demonstrate real-time, location-specific resource allocation. Use visual mapping tools to make decision-making more intuitive and actionable.

6. Time Discounting (Hyperbolic Discounting)

- Relevance: LHDs may focus more on immediate operational pressures rather than the long-term efficiency gains offered by MChart.
- Mitigation: Present short-term wins alongside long-term benefits—such as faster reporting, quicker resource allocation, and improved decision-making—to ensure LHDs recognise immediate value.

Mental Health Commissions

Mental Health Commissions advocate for systemic improvements in mental health care, focusing on policy development, funding advocacy, and cross-jurisdictional planning. These organisations require comprehensive, accurate, and timely data to identify trends, assess service gaps, and recommend effective interventions. MChart supports these efforts by providing a data-driven platform that enhances planning capabilities, facilitates evidence-based decision-making, and promotes systemic improvements across mental health services.

Mental Health Commissions Pain Points.

Cross-Jurisdictional Gaps in Data and Insights:

Mental Health Commissions often operate across multiple regions, requiring data that spans jurisdictions to understand broader trends and service gaps. However, existing tools frequently lack the ability to provide a unified, comprehensive view of services and outcomes across these areas. This limits the commissions' ability to develop effective cross-regional policies and recommendations.

Data Inconsistency and Quality Issues:

The commissions often encounter data that is incomplete, inconsistent, or poorly formatted, making it difficult to extract actionable insights. Current systems may not provide the validation and analytics needed to ensure data accuracy, undermining the credibility of their findings and the effectiveness of their advocacy.

Limited Integration with Broader Systems:

Many existing tools fail to integrate data from a wide range of sources, leaving gaps in understanding and reducing the utility of the insights they produce. This lack of integration complicates efforts to connect service availability with outcomes, making it harder for commissions to develop effective, data-driven recommendations.

Staged Adoption Across LHDs:

While MChart offers superior capabilities compared to existing platforms, its staged adoption across Local Health Districts (LHDs) may present challenges for Mental Health Commissions. The need for consistent and comparable data across multiple regions is critical for cross-jurisdictional planning and advocacy. Staggered implementation might lead to gaps in data availability or discrepancies in reporting, complicating efforts to draw meaningful insights at a systemic level.

Resource and Time Pressures for Advocacy Efforts:

Commissions operate under tight timelines to produce impactful advocacy documents and policy recommendations. Gathering, processing, and analysing data from multiple sources consumes significant time and resources, leaving little capacity for in-depth analysis or strategic planning. This constraint often forces commissions to prioritise speed over depth in their reporting.

Mental Health Commissions Value Proposition.

MChart empowers Mental Health Commissions to overcome these challenges by offering a powerful, integrated platform tailored to their unique needs. By streamlining data collection, validation, and analysis, MChart provides commissions with the tools they need to develop impactful, evidence-based policies and recommendations, ensuring they can drive systemic improvements efficiently and effectively.

Unified Cross-Jurisdictional Data Insights:

MChart provides a comprehensive view of mental health services and outcomes across multiple jurisdictions. Its ability to consolidate data from diverse sources enables commissions to identify cross-regional trends and service gaps, supporting the development of more effective and coordinated policies.

High-Quality Data Analytics and Validation:

MChart includes robust validation and analytics tools to ensure the data used for advocacy is accurate, consistent, and credible. This enhances the reliability of reports and recommendations, strengthening the commissions' influence with policymakers and stakeholders.

Seamless Integration of Diverse Data Sources:

MChart integrates data from multiple systems and sources, creating a unified platform that connects service availability with outcomes. This holistic approach enables commissions to generate actionable insights that drive meaningful improvements in mental health care.

Time-Saving Tools for Rapid Advocacy:

With features designed to streamline data analysis and reporting, MChart reduces the time required to produce impactful advocacy materials. Custom dashboards, automated analytics, and real-time updates allow commissions to focus on strategy and decision-making rather than manual data processing.

By addressing these pain points and providing robust, actionable solutions, MChart positions itself as an invaluable resource for Mental Health Commissions. Its innovative features, integration capabilities, and time-saving tools ensure that commissions can achieve their goals of systemic improvement and impactful advocacy with greater efficiency and confidence.

Overcoming bias

1. Status Quo Bias

- Relevance: Commissions may be hesitant to shift away from existing methods of data collection and policy planning, even if they are inefficient.
- Mitigation: Position MChart as a modern enhancement to existing processes rather than a disruptive replacement. Highlight how it integrates seamlessly with current workflows to minimise transition barriers.
-

2. Authority Bias

- Relevance: Decision-makers within commissions may defer to traditional data collection methods and established methodologies rather than adopting new technologies.
- Mitigation: Secure endorsements from respected industry leaders and researchers who validate MChart's methodology. Use evidence-based case studies to reinforce credibility.
-

3. Ambiguity Aversion

- Relevance: Uncertainty about how MChart will function within complex regulatory and cross-jurisdictional frameworks may delay adoption.

- Mitigation: Provide detailed implementation roadmaps, pilot study results, and transparent data governance policies to build confidence. Demonstrate how MChart aligns with existing regulatory requirements.

-

4. Cognitive Overload & Complexity Bias

- Relevance: Commissions handle large-scale, multi-layered data sets and may perceive a new platform as adding complexity rather than simplifying processes.
- Mitigation: Emphasise MChart's time-saving tools, including automated analytics, validation features, and custom dashboards, which reduce manual workload and streamline reporting.

-

5. Confirmation Bias

- Relevance: Commissions may seek data that reinforces pre-existing policy stances, leading to resistance against insights that challenge established narratives.
- Mitigation: Highlight MChart's data validation tools and cross-jurisdictional comparisons, showcasing how objective, high-quality insights lead to more effective policymaking.

-

6. Loss Aversion

- Relevance: Commissions may be hesitant to reallocate budgets or invest in a new platform if they perceive potential risks or costs associated with transitioning.
- Mitigation: Demonstrate the long-term cost-effectiveness of MChart by showcasing efficiency gains, reduced resource waste, and faster policy development cycles.

3.2 International Markets

The Role of International Markets in Credibility and Growth

While MChart is currently focused on the Australian market, international interest is already emerging through word-of-mouth and professional networks. This early global engagement presents an opportunity to enhance MChart's credibility, positioning it as a leading solution in mental health planning.

Key Considerations for International Markets:

- **Credibility Through International Adoption:** A presence in international markets can enhance MChart's perceived credibility within Australia. By showcasing adoption in overseas markets, MChart strengthens its legitimacy among Australian decision-makers who may be hesitant to adopt new solutions.
- **Organic International Expansion:** Early indicators suggest that professionals in overseas markets are expressing interest in MChart, despite no formal marketing efforts. This demonstrates that MChart's value proposition is relevant beyond Australia and suggests that targeted international engagement could yield positive outcomes.
- **Market-Specific Adaptation:** While core functionalities remain consistent, the way MChart is marketed and implemented may need to be adjusted for different regulatory and funding environments. For example, in markets like the United States, where mental health funding structures differ from Australia's, MChart may require a modified pricing and implementation approach.

Marketing Implications:

- While not a core focus, international interest should be monitored, and case studies from overseas adopters should be leveraged to enhance domestic credibility.
- Messaging should acknowledge that MChart has global relevance but focus on its direct applicability to Australian planners.
- As more structured international engagement begins, return on marketing investment (ROMI) calculations will need to adapt to reflect differences in funding models, competitive landscapes, and regulatory environments.

3.3 Competitive landscape

The market for mental health navigation tools is diverse, with over 100 platforms available, yet few are designed specifically for planners. Understanding the dynamics of this market, including competition, gaps, and opportunities, is crucial to positioning MChart effectively. This section provides a comprehensive overview of market dynamics, competitor analysis, and opportunities for positioning strategies to ensure MChart meets the needs of its target audiences while capitalising on market opportunities.

Market Dynamics

Fragmentation and Lack of Planner-Specific Tools:

The mental health navigation tool market is characterised by a broad array of platforms, many of which are designed for either direct patient engagement or operational management within health services. While these tools often provide value for their intended audiences, they leave planners underserved. Tools for planners typically lack advanced features such as geographic mapping, cross-jurisdictional insights, or dynamic dashboards tailored to complex planning needs. This gap creates a significant opportunity for MChart to fill a void in the market, positioning itself as the only tool designed specifically for the unique requirements of planners. The lack of competition in this niche also provides MChart with a chance to establish itself as a category leader.

Dominance of Federal Platforms:

Federal tools like the National Mental Health Services Planning Framework (NMHSPF) have become entrenched in the planning ecosystem. They are often seen as the default due to their widespread adoption and alignment with government policy. However, these platforms, while essential for compliance, are limited in their scope and flexibility. They typically lack the user-friendly design and advanced analytics that modern planners require to address nuanced, region-specific challenges. MChart has an opportunity to position itself as a complementary tool that enhances the functionality of federal platforms. By integrating seamlessly with these established systems, MChart can alleviate concerns about redundancy while offering capabilities that surpass those of federal tools.

Emerging Trends in Data-Driven Decision-Making:

There is a growing demand for tools that leverage real-time data, advanced analytics, and predictive modelling to support evidence-based decision-making. This trend reflects the increasing complexity of mental health planning, which requires sophisticated tools to analyse and visualise large datasets effectively. MChart's ability to offer geographic mapping, cost-benefit analysis, and custom dashboards directly addresses this demand. Moreover, the platform's capacity to adapt to emerging needs, such as the integration of social determinants of health, positions it as a forward-thinking solution for planners.

Budget Constraints and ROI Focus:

Budget pressures across PHNs, LHDs, and commissions often create significant barriers to adopting new tools. Decision-makers are scrutinising expenditures more closely than ever, demanding clear, measurable returns on investment. For MChart, this means demonstrating tangible benefits such as reduced planning time, cost savings through better resource allocation, and improved outcomes for communities. Building a strong business case with concrete ROI metrics will be critical to overcoming financial objections and securing buy-in from budget-conscious stakeholders.

Competitor Analysis

Key Competitors:

Federal Platforms (e.g., NMHSPF): These platforms are widely adopted and trusted for their compliance with government standards. However, they often fall short in offering advanced functionality and user-centric design, limiting their utility for more complex planning scenarios.

Integrated Health Systems Tools (e.g., HealthPathways): These tools cater primarily to service providers and focus on care coordination rather than planning. While they have broad functionality, their lack of planner-specific features and high customisation requirements make them less effective for addressing the needs of PHNs and LHDs.

Niche Solutions: Smaller, specialised platforms may excel in particular areas, such as cost analysis or geographic mapping, but they often lack scalability and integration capabilities. Additionally, these tools may require significant technical expertise, further limiting their accessibility.

Strengths:

- Federal platforms are entrenched in the planning ecosystem, making them a default choice for many planners.
- Established tools have extensive user bases and integration with existing workflows, which reduces adoption barriers.
- Some niche solutions offer specialised features that can address specific needs effectively.
- Continuing with familiar tools and processes often feels simpler and less disruptive for users, as it avoids the effort and potential challenges of advocating for and implementing change.

Weaknesses:

- Many platforms fail to cater specifically to planners, focusing instead on operational or patient-facing needs.
- The complexity and rigidity of established tools can make them difficult to use, especially for smaller or resource-constrained organisations.

Existing solutions often lack real-time data capabilities, advanced analytics, or cross-jurisdictional insights, leaving critical gaps in planning functionality.

Challenges in Competing with Federal Platforms:

Competing with established federal platforms requires careful positioning, particularly as stakeholders are unlikely to want to maintain both systems long-term. While MChart can initially be positioned as a complementary tool that enhances the functionality of federal systems, it should also provide a clear pathway to eventually becoming the primary planning platform. This strategy involves demonstrating how MChart can consolidate workflows, streamline processes, and reduce duplication over time, making it the more efficient and cost-effective solution.

To achieve this, communication strategies must be tailored to the distinct pain points and potential gains for each stakeholder group:

- PHNs: Emphasise how MChart reduces inefficiencies and enhances decision-making through real-time data and integrated mapping. Highlight its ability to align with federal tools initially while providing superior functionality for their regional needs.
- LHDs: Focus on how MChart's customisable dashboards and resource allocation tools simplify complex regional planning. Showcase how it eases operational burdens and supports long-term workflow consolidation without creating additional pressure during the transition.
- Commissions: Position MChart as a powerful advocacy and policy development tool, capable of delivering cross-jurisdictional insights and robust analytics. Demonstrate how transitioning to MChart as the primary platform can provide more reliable, actionable data for systemic improvements.

By addressing the unique challenges and priorities of each group through targeted communications, MChart can reduce resistance, build trust, and demonstrate the long-term value of transitioning from federal platforms.

Opportunities for Positioning and Differentiation:

Planner-Centric Design: Unlike most competitors, MChart is designed from the ground up to meet the unique needs of planners. Its features, such as tailored dashboards and dynamic data visualisation, provide unparalleled utility for this audience.

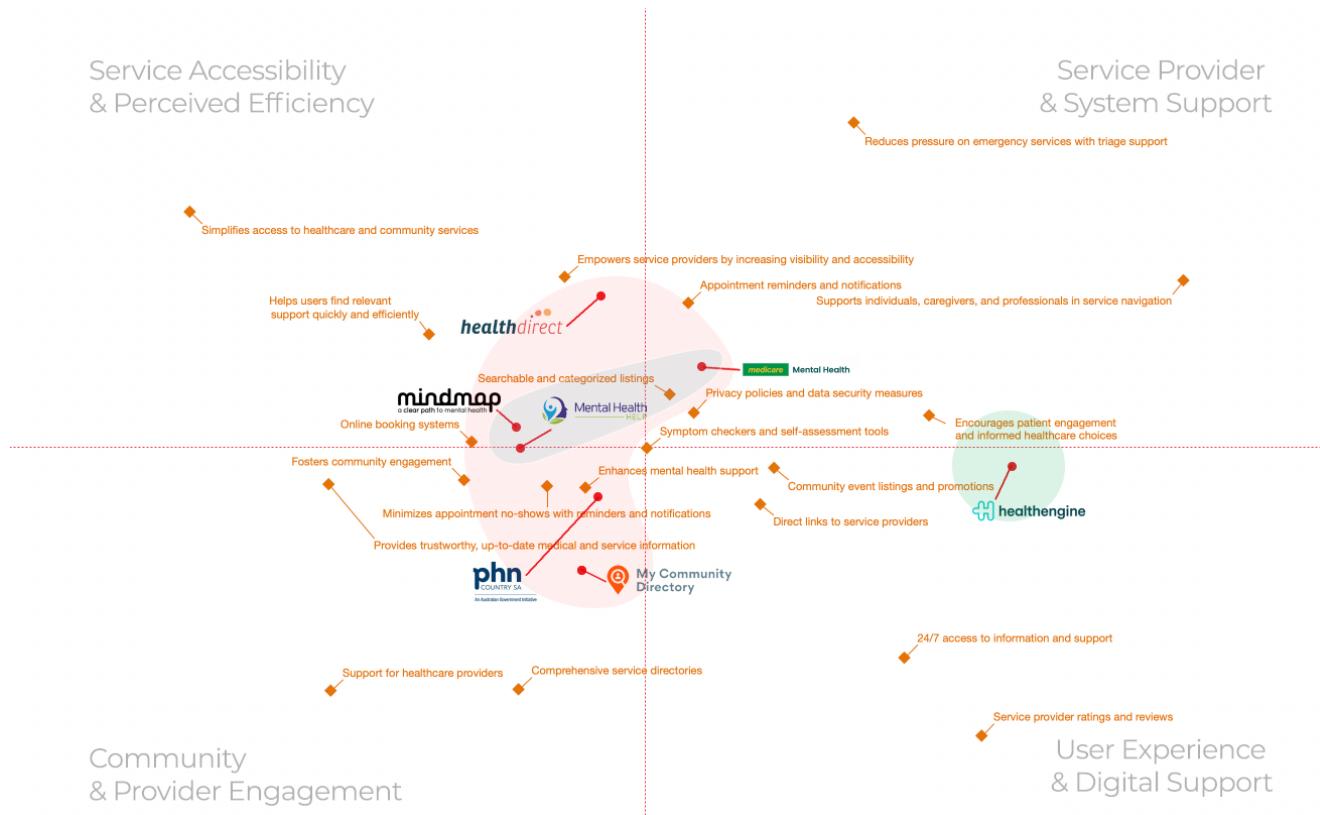
Integration and Usability: MChart's seamless integration with existing systems and focus on an intuitive user experience set it apart from more cumbersome platforms.

Cross-Jurisdictional Capabilities: MChart's ability to consolidate and analyse data across multiple regions offers a critical advantage for organisations involved in systemic planning and policy development.

Scalability: While some niche solutions struggle with scalability, MChart is built to grow alongside its users, adapting to increasingly complex planning needs and larger datasets.

Marketplace multidimensional perception mapping.

We conducted a marketplace multidimensional mapping analysis of seven alternative platforms to mChart, aiming to understand their relative strengths, weaknesses, and strategic positioning as they communicate them. This evaluation was guided by a comprehensive set of grading factors derived from a synthesis of the core capabilities, features, and value propositions communicated across all seven platforms. These common themes - ranging from service accessibility and digital tools to user support and provider engagement—formed the foundation of our comparison criteria. Additionally, we incorporated unique elements intrinsic to MChart's offering, such as its focus on simplifying service navigation, enhancing patient engagement, and minimising systemic inefficiencies. The resulting framework provides a well-rounded lens through which to assess differentiation aspects within the context of the subject ecosystem.

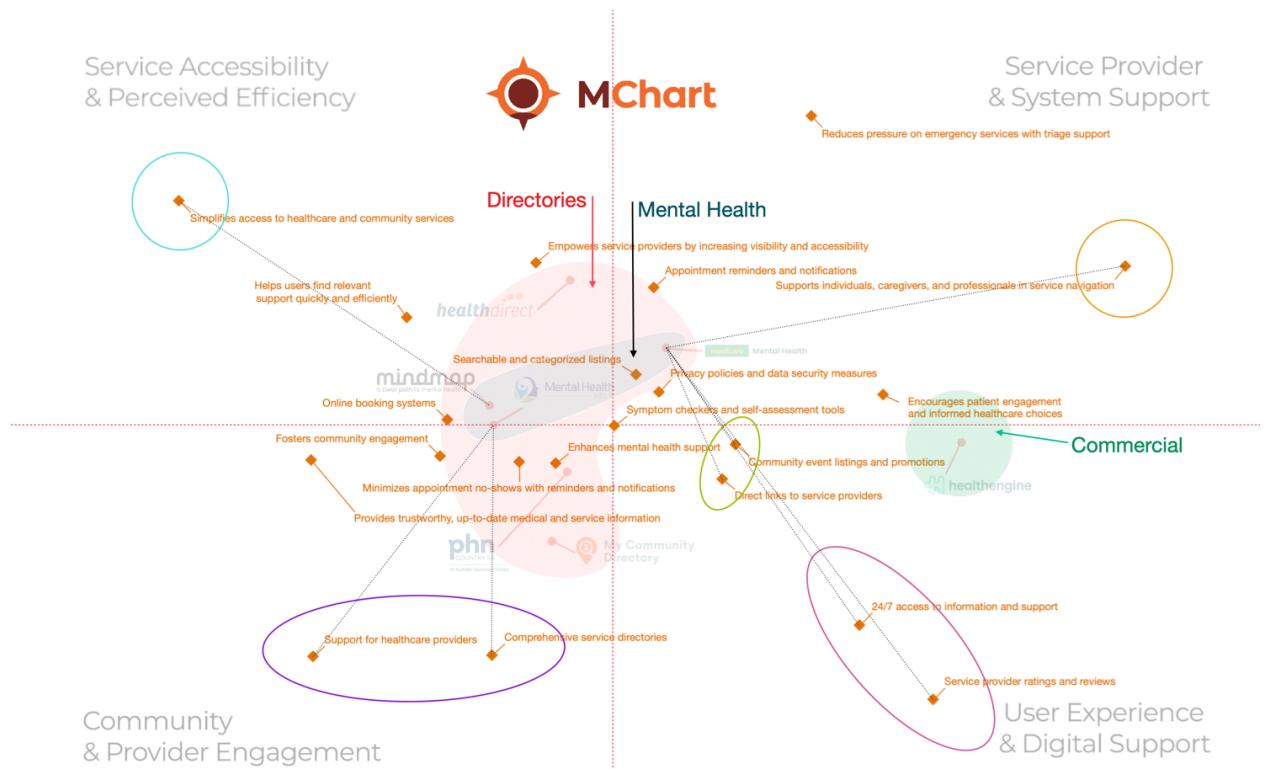


Positioning on this map might seem counterintuitive at first glance, as more generic or broad-spectrum platforms can appear pushed away from niche or specialized solutions. This effect occurs because shared capabilities—like searchable listings or basic directories—act as a gravitational centre, while more distinctive features such as mental health triage, appointment systems, or community engagement pull platforms outward into the clearer strategic territory. As a result, platforms with sharper or more focused offerings may seem more distinct, even if they overlap on core functions with others.

This chart reveals a tight central clustering of most mental health and service navigation platforms, indicating significant overlap in feature sets, messaging, and target users. This crowding suggests a high degree of functional parity and potential difficulty in achieving differentiation through core offerings alone. In contrast, HealthEngine stands notably apart in the lower-right quadrant, signaling a stronger focus on user experience, commercial features, and digital support tools—elements that may appeal more to consumer-driven healthcare journeys.

Key Marketing Insights:

- **Market Saturation at the Core:** Competing in the central zone means entering a crowded space with minimal feature differentiation, requiring standout branding or partnerships to gain attention.
- **Whitespace Opportunities Exist:** Clear opportunities lie outside the cluster in more specialised zones (e.g., commercial UX, triage tools, community engagement), where fewer brands operate.
- **Perceived Efficiency Matters:** Platforms positioned closer to the Service Accessibility & Perceived Efficiency axis may have an easier time building trust and public adoption due to their clear, value-driven utility.
- **HealthEngine's Differentiation:** Its distinct positioning may reflect the strength of a consumer-first, convenience-led model—suggesting that design, immediacy, and user empowerment can be key competitive levers.
- **MChart's Strategic Edge Not Shown:** It's important to note that MChart includes additional, differentiated capabilities—such as a strong data layer for planners and decision-makers—which are not visualised on this chart. These system-facing features provide a strategic advantage and expand its value proposition beyond what is captured in consumer-facing comparisons.



The five coloured rings highlight potential areas of “clear space” within the current digital mental health and service navigation landscape. These zones represent combinations of features and positioning that existing platforms have not

heavily occupied, meaning mChart could enter these spaces without needing to displace an incumbent brand. This strategic advantage could reduce marketing spend and accelerate time to market. However, it's important to note that while these spaces are under-served, they may also reflect areas that current competitors have deprioritised due to lower user demand or perceived value - suggesting an opportunity but also a need for careful validation with users.

● Service Accessibility & Perceived Efficiency

This zone focuses on platforms that streamline access to healthcare and community services, helping users quickly and efficiently find the support they need. It emphasises intuitive navigation, simplified pathways, and broad service visibility.

Pros	Cons
• Clear value proposition for users.	• Requires wide service integration.
• Aligns with public health objectives.	• Hard to differentiate from existing directories.
• Broad audience appeal.	• May rely on outdated third-party data.
• Easy to message benefits (e.g. "Find support fast").	• Ongoing data upkeep can be resource-heavy.

● Service Provider & System Support

This space highlights features that assist healthcare systems and professionals, such as triage tools, navigation support, and service coordination. Platforms here tend to reinforce operational efficiency and reduce strain on emergency services.

Pros	Cons
• Strong appeal to health orgs and governments.	• Complex integrations with backend systems.
• Potential for B2B or licensing revenue.	• Long sales cycles with institutions.
• Helps with system-level KPIs (e.g. reduced ER strain).	• Needs clinical validation or oversight.
• Less user churn—longer-term stakeholder engagement.	• Less visible to everyday users (lower viral potential).

● Community & Provider Engagement

This zone represents tools and platforms that support collaboration between providers and community stakeholders. It includes features like provider resources, professional networks, and tools for local engagement.

Pros	Cons
• Builds trust and local relevance.	• Slower to scale across regions.
• Leverages grassroots promotion.	• Hard to show immediate ROI.
• Enhances provider loyalty and buy-in.	• Resource-intensive relationship building.
• Can attract funding for social impact.	• Community events/info need constant updating.

● Connection & Events

Focused on strengthening real-world links, this area covers platforms that offer direct connections to service providers and promote local community events. It supports visibility and real-time discovery of in-person or local options.

Pros	Cons
• Tangible user value (bookings, events).	• High moderation and data freshness needed.
• Encourages regular user return.	• Seasonal/event-based traffic fluctuation.
• Strong fit for partner collaborations.	• Liability risk with third-party events.
• Easy to monetise via event promotion.	• Dependence on local orgs' participation.

● User Experience & Digital Support

This zone covers tools that enhance the user's digital journey, including always-on access, service transparency, reviews, and engagement tools. Platforms here prioritise convenience, trust, and informed decision-making.

Pros	Cons
<ul style="list-style-type: none"> Highly marketable UX benefits. Drives engagement and retention. Ratings/reviews boost credibility. Strong fit for SEO and app store visibility. 	<ul style="list-style-type: none"> Requires robust tech infrastructure. Data security and privacy liability. Review systems can be abused. High user expectations on design/usability.

The seven brands outlined have different areas of operations. They are:

healthdirect.gov.au	Australia-wide
mycommunitydirectory.com.au	Australia-wide
mindmap.act.gov.au	Australian Capital Territory (ACT) only
healthengine.com.au	Australia-wide
medicarementalhealth.gov.au	Australia-wide
servicesdirectory.org.au	Regional South Australia
mentalhealthhelp.com.au	Blue Mountains, Hawkesbury, Lithgow, Penrith (NSW)

Consideration should be given to how a brand's market positioning might vary based on its geographical reach - from specialised local expertise to broader regional insights, through to market leadership on a national or global scale. For MChart, this means marketing should evolve strategically: initially emphasising strong local relevance and targeted messaging, then broadening to reflect regional insights and adaptability, and eventually shifting towards broader market leadership, credibility, and consistency as it expands to more areas.

Here are the scores for the factors and sites.



Scale – 0 = factor not used or not connected – 5 = factor heavily used or connected

Method: sites identified by the MChart team were scrapped of content using scraperapi.com, this content was then thematically clustered using whyhive.com AI models. The cluster themes were then supplied to OpenAI to read each site, looking for relevancy and volume of content relating to each terms. Returning a score for each between 0 and 5.

This analysis of market dynamics and competitors provides a robust foundation for positioning MChart as a transformative tool for mental health planning. By leveraging its unique strengths and addressing barriers to adoption, MChart can establish itself as the premier planning platform in this space.

4.0 OBJECTIVES & KEY MEASUREMENTS

There are two behaviours and one attitude in the domains in the GIAF impact analysis framework that can be directly influenced by marketing (behaviours: adoption and penetration; attitude: perceptions of usefulness). We will know the marketing strategy has succeeded when there is:

Ratings for perceived tool usefulness (all 7 levels of relevance, acceptability, applicability, practicality, efficiency and value) achieve a mean score of more than 50% by the expert panel of partner organisations (and possibly a small group of other end users)

Adoption of the tool (awareness, assimilation, conversion, allocation, provision and routinisation) achieves allocation (level 4) by at least 1 partner and assimilation (level 2) by at least 2 non-partner organisations from the target audience (PHNs, LHDs and industry)

Penetration of the tool achieves a moderate level (level 3) with 30% of partner organisations.
This translates to 1 partner organisation

5.0 MARKETING STRATEGIES

5.1 Product Strategy - MChart

MChart is a purpose-built platform designed to address the specific needs of mental health planners. Its development has been guided by collaboration with stakeholders, ensuring the product aligns with real-world challenges and provides practical solutions. This section outlines MChart's core features, unique selling proposition, and alignment with user needs, emphasising its capacity to integrate seamlessly into existing workflows while delivering measurable value.

Key Features

Geographic Mapping:

- Purpose: Enables users to visualise mental health services, resource allocation, and service gaps across diverse regions in real-time.
- Value: Provides planners with actionable insights to optimise resource distribution and prioritise underserved areas. This feature is particularly beneficial for LHDs managing geographically dispersed populations and for commissions advocating for cross-regional improvements.

Cost-Benefit Analytics:

- Purpose: Delivers insights into the financial and operational efficiency of services, enabling evidence-based resource allocation.
- Value: Helps stakeholders evaluate the impact of funding decisions and identify opportunities to maximise the return on investment. PHNs, for example, can use this feature to justify funding applications and prioritise high-impact initiatives.

Customisable Dashboards:

- Purpose: Offers users the ability to personalise their interface based on specific planning needs, such as jurisdictional requirements or service focus areas.
- Value: Improves usability by ensuring that each stakeholder can access the most relevant data and tools efficiently, reducing the learning curve and enhancing adoption.

Data Integration and Validation:

- Purpose: Consolidates data from multiple sources while providing robust validation tools to ensure accuracy and consistency.
- Value: Eliminates inefficiencies associated with fragmented data systems and enhances the reliability of insights for all users, including commissions requiring high-quality data for policy advocacy.

Data Collection and Atlas creation:

- As part of the onboarding journey, it's important to distinguish the data collection and atlas creation service from the core MChart platform offering. For some clients, particularly those without existing planning datasets, this will be a paid preparatory service that enables them to get full value from the platform upon implementation.

Others may already have this data in place and can proceed directly to platform onboarding. To support different levels of data readiness, the onboarding process should offer flexible entry points, allowing clients to choose the service pathway that best aligns with their current capabilities and needs.

Assisted Trial Program:

- Purpose: Supports stakeholders during the onboarding process by providing dedicated assistance for integration, training, and troubleshooting.
- Value: Addresses resource and time constraints, builds user confidence, and fosters collaborative relationships. This feature also allows for early identification and resolution of adoption barriers.

5.2 Branding & Recall

The Importance of Front-of-Mind Recall and Broad Branding

In a market saturated with competitors, front-of-mind recall is critical to MChart's success. With over 100 navigation tools addressing various aspects of mental health planning, decision-makers are inundated with choices. MChart must stand out not only by delivering superior functionality but also by ensuring its brand is consistently associated with trust, innovation, and effectiveness. Marketing strategies must create strong mental availability—ensuring that when planners, organisations, or commissions face challenges, MChart is the first solution that comes to mind. This requires a cohesive, multi-channel brand presence and consistent messaging that reinforces its unique value at every touchpoint.

However, branding tied too closely to a specific product vertical or feature set, such as "mental health care," could limit MChart's potential as it evolves. The name "MChart," while directly relevant now, may narrow future perceptions of its use cases. For instance, as MChart seeks to expand into adjacent sectors like housing, disability services, or education, a name so tightly associated with mental health may not resonate broadly. A more expansive, adaptable brand identity would allow the platform to grow its market reach while maintaining relevance across different verticals. By establishing a brand that is rooted in overarching values like data-driven decision-making, efficiency, and innovation, MChart can future-proof its positioning, ensuring flexibility for broader adoption and use.

White-Labeling and Mass Adoption Strategy

MChart has the potential to be distributed through white-label partnerships, where third-party organisations can brand the platform under their own identity while leveraging its full functionality. This model supports mass adoption by allowing trusted institutions (such as government agencies, peak bodies, or healthcare networks) to integrate MChart within their existing service offerings.

Recent announcements such as Bupa's plan to launch 60 mental health clinics across Australia, highlight the growing role of private health funds in service delivery. This shift presents an opportunity for MChart to explore white-labeling partnerships with private providers, who may seek tools to support internal planning, reporting, or coordination across clinic networks.

Offering MChart under a co-branded or private-label model could enable large-scale adoption within these expanding ecosystems, while reinforcing the platform's relevance beyond the public sector. These partnerships could also help bridge gaps between public and private data systems, enhancing MChart's value as a cross-sector planning solution.

Key Benefits of White-Labelling:

- Increased Market Penetration: Allows MChart to reach a broader audience through established industry networks.
- Reduced Friction in Adoption: Organisations can integrate MChart into their existing ecosystem, avoiding resistance to external tools.
- Revenue Model Diversification: Enables licensing agreements with large institutions that prefer custom branding for their stakeholders.

Bias Considerations

The ability to white-label MChart may help mitigate:

- Familiarity Bias: By enabling established organisations to brand MChart as their own, users are more likely to trust and adopt the platform.
- Status Quo Bias: Organisations hesitant to adopt an unfamiliar tool can integrate MChart under their existing brand, reducing perceived change risk.
- Loss Aversion: White-labelling reassures users that they are not “losing” their existing system but enhancing it with additional capabilities.

To further solidify MChart’s credibility, a “**Powered by DESDE**” moniker can be strategically used to reinforce the platform’s reliability while maintaining flexibility in branding. DESDE (Description and Evaluation of Services for Disabilities in Europe) is a well-recognised methodology for mental health service classification and mapping, adding an additional layer of trust to MChart’s positioning.

5.3 Positioning - Unique Selling Proposition (USP)

“MChart: The Planner’s tool for strategic decision-making”

MChart stands out as the only navigation platform designed specifically for planners, offering unparalleled functionality that bridges the gap between existing tools and modern planning needs. By combining real-time data insights, intuitive usability, and seamless integration with existing workflows, MChart empowers users to make informed decisions that optimise resources and improve mental health outcomes. Its scalable and future-ready design ensures it evolves with the needs of PHNs, LHDs, and commissions, making it an indispensable partner in navigating the complexities of mental health planning.

Alignment with User Needs

For PHNs:

- Needs: Efficient resource allocation, streamlined planning processes, and enhanced funding justification.
- Alignment: MChart’s cost-benefit analytics and real-time mapping support PHNs in meeting these objectives while maintaining compliance with federal expectations.

For LHDs:

- Needs: Customisable tools to manage diverse regional needs, integrated data for accurate planning, and minimal operational disruption.
- Alignment: MChart’s dashboards and integration capabilities ensure usability and efficiency, even in resource-constrained environments.

For Commissions:

- Needs: High-quality, cross-jurisdictional data for advocacy and policy development.

- Alignment: MChart's data validation and integration features provide commissions with the insights needed to drive systemic improvements and influence policy effectively.

MChart's thoughtful design and innovative features position it as the premier tool for mental health planning. By addressing the specific needs of PHNs, LHDs, and commissions, MChart delivers measurable value while ensuring seamless integration with existing workflows. Its unique capabilities make it an indispensable asset for improving planning efficiency, optimising resources, and driving systemic improvements in mental health care.

5.4 Pricing

Pricing is more than just a cost consideration—it plays a fundamental role in influencing decision-making. MChart's pricing model should leverage behavioural economics principles to reduce resistance, guide users towards adoption, and reinforce long-term retention. The right pricing structure can drive engagement by minimising cognitive barriers, creating a sense of urgency, and enhancing the perceived value of the platform.

When potential users evaluate software solutions like MChart, they face multiple decision-making biases that can delay adoption or introduce hesitation. Factors such as uncertainty, perceived risk, and fear of financial commitment can slow down decision-making. However, by applying well-established nudge techniques, MChart's pricing strategy can remove friction, increase perceived value, and make the transition from trial to paid subscription feel like a natural progression.

By designing pricing with psychological principles in mind, MChart can:

- Lower barriers to entry by making the trial experience seamless.
- Encourage commitment by structuring choices in a way that favours retention.
- Drive perceived value by shaping expectations and highlighting benefits.
- Improve revenue predictability by guiding users toward subscription upgrades.

Defaults and Friction Reduction:

By making the trial the default option, MChart simplifies the decision-making process, reducing the cognitive load on potential users. NUDGE: A free trial should be the default option, ensuring users engage with the platform before making a purchase decision.

Decoy Effect:

Position the Standard and Enterprise plans strategically to make the Standard tier appear as the most balanced and attractive option, encouraging users to upgrade from the trial. NUDGE: Positioning multiple tiers of pricing (Trial, Standard, Enterprise) ensures that the mid-tier appears as the most rational choice.

Endowment Effect:

Once users experience MChart's value during the trial, they will likely perceive it as part of their routine, making it harder for them to let go of access. NUDGE: Once users have integrated MChart into their workflows, they are less likely to discontinue use.

Gamification:

Introduce gamified elements into the user journey, such as progress indicators, milestone achievements, or badges for completing onboarding tasks. These elements tap into users' desire for reward and accomplishment, motivating them to explore the platform further and stay engaged. NUDGE: Rewarding users for completing onboarding steps increases commitment to continued use.

Transparency and Trust:

Clearly outline the features and benefits of each access level to build trust and reduce hesitation, ensuring users feel informed and confident in their choices.

5.5 Distribution & Choice

Choice architecture is a behavioural economics framework involving designing environments that guide people toward better decisions by structuring their options in a way that is intuitive and persuasive and leveraging existing biases. For MChart, implementing effective choice architecture ensures that users are presented with clear, appealing pathways to adoption, retention, and deeper engagement.

MChart's design leverages choice architecture not only at the user level but also at the system level, guiding both individuals and institutional stakeholders toward high-value decisions. While users are nudged through intuitive access tiers, planners and funders encounter a parallel structure—one shaped by data insights, impact visualisation, and planning tools. These features create an environment where the “best choice” for decision-makers becomes clear: adopt MChart to improve service coordination, identify gaps, and inform investment. Unlike traditional platforms focused solely on navigation, MChart operates as a dual-choice environment, reinforcing value across both operational and strategic layers.

Marketing Action:

Craft messaging and engagement pathways that frame MChart as the default smart choice for system stakeholders—emphasising planning support, performance reporting, and community-level intelligence to appeal to both rational evaluation and behavioural triggers like perceived control and risk reduction.

Access Levels

The structure of access levels creates a clear progression, encouraging users to start with a low-commitment trial before transitioning to paid subscriptions or enterprise-level solutions. By offering distinct options with escalating value, MChart taps into behavioural principles such as loss aversion (not wanting to lose the benefits experienced in the trial) and anchoring (framing the Standard and Enterprise tiers as premium choices in comparison to the trial).

Trial:

- Design Principle: The free trial lowers the barrier to entry, allowing users to explore core features without financial risk.
- Behavioural Insight: People often choose the default or “risk-free” option when uncertain. Highlighting the ease and benefits of the trial makes it the natural first step.
- Implementation: Showcase core features prominently during the trial and provide subtle prompts about the additional value available in paid plans.

Standard Subscription:

- Design Principle: This tier balances cost and value, offering advanced analytics for users ready to commit.
- Behavioural Insight: Users who experience the trial may feel a sense of progress and desire to retain access to premium features, making the Standard subscription an appealing next step.
- Implementation: Use comparative messaging, such as “Unlock advanced analytics for deeper insights,” to position this as the logical upgrade.

Enterprise Package:

- Design Principle: The customisable package addresses the unique needs of large organisations, appealing to their preference for tailored solutions.
- Behavioural Insight: Highlighting exclusivity and flexibility increases perceived value, especially for decision-makers in complex organisations.

- Implementation: Offer dedicated support and demonstrations to showcase the package's adaptability to specific organisational needs.

By structuring access levels and incorporating behavioural insights, MChart's choice architecture guides users toward engagement and long-term adoption. Leveraging principles such as defaults, the decoy effect, and gamification ensures decisions feel natural, value is clear, and barriers to action are minimised.

5.6 Communications

Effective communication is critical to driving awareness, adoption, and retention of MChart. The content strategy for MChart focuses on creating targeted, value-driven materials tailored to the needs of PHNs, LHDs, and commissions. By aligning educational, engagement, and retention content with user pain points and objectives, MChart can build trust, demonstrate its value, and foster long-term relationships with its users.

Educational Content

Provide users with the knowledge and resources needed to understand MChart's capabilities and how it can solve their challenges. Educational content lays the foundation for adoption by addressing questions and concerns while showcasing the platform's unique value.

Training Videos and Webinars:

- Content: Step-by-step guides on how to use key features like geographic mapping and cost-benefit analysis.
- Target Audience: Primarily PHNs and LHDs, where users may need hands-on guidance to integrate MChart into their workflows.
- Delivery: Hosted live and on-demand for flexibility, ensuring accessibility across different time zones and schedules.

Infographics and Visual Guides:

- Content: Simplified overviews of MChart's features, benefits, and workflows, tailored to each user group.
- Target Audience: All stakeholders, particularly decision-makers with limited time.
- Delivery: Distributed through email campaigns, social media, and presentations at conferences.

White Papers and Case Studies:

- Content: In-depth materials illustrating how MChart has improved planning efficiency, resource allocation, and mental health outcomes in pilot regions.
- Target Audience: Commissions and policy-makers who require detailed evidence to support adoption and advocacy.
- Delivery: Downloadable content on the MChart website and featured in targeted email campaigns.

Materials for Support Services:

- Content: Technical overviews, integration guides, and FAQs designed specifically for IT teams and other support services. These materials highlight MChart's robust engineering, ease of integration, and minimal disruption to existing systems.
- Target Audience: IT teams and operational stakeholders, whose support is critical for successful implementation.
- Delivery: Distributed through targeted outreach and included in onboarding packages.

Testimonials and Peer Advocacy:

- Content: Testimonial videos and written endorsements from early adopters highlighting MChart's impact. Use real-world examples to demonstrate how MChart has resolved challenges and improved workflows.
- Target Audience: Prospective users who may be hesitant about adoption, as well as decision-makers seeking validation from trusted peers.

- **Delivery:** Testimonials featured on the MChart website, social media, and in email campaigns. Provide early adopters and influencers with free accounts or extended trials in exchange for sharing their experiences to inspire confidence in others.

Engagement Content

Build relationships with users and keep them engaged throughout their journey with MChart. Engagement content should emphasise the platform's ability to solve real-world problems while fostering an emotional connection with its audience.

Blogs and Newsletters:

- **Content:** Regular updates on MChart's developments, user success stories, and industry insights. Blogs also contribute to SEO by creating keyword-rich, informative content that improves online visibility.
- **Target Audience:** PHNs, LHDs, and commissions looking to stay informed about best practices and emerging trends.
- **Delivery:** Published on the MChart website and sent via email to subscribers.

Interactive Demonstrations:

- **Content:** Live and virtual demos showcasing MChart's capabilities, with Q&A sessions to address user-specific questions.
- **Target Audience:** Prospective users and early adopters exploring MChart's potential.
- **Delivery:** Conducted during industry events, webinars, and dedicated sessions for interested organisations.

Social Media Campaigns:

- **Content:** Bite-sized videos, graphics, and testimonials highlighting MChart's features and benefits.
- **Target Audience:** Broader audiences, including stakeholders and influencers in the mental health sector.
- **Delivery:** Platforms like LinkedIn and X (Twitter) to reach professional networks.

Trade Events and Conferences:

- **Content:** Participation in industry trade events, with a focus on securing opportunities for presentations and panel discussions.
- **Target Audience:** PHNs, LHDs, commissions, and other stakeholders attending the events who are actively seeking innovative solutions.
- **Delivery:** Integrate presentations with booth displays, handouts, and post-event follow-ups to maximise impact and engagement

Retention Content

Ensure continued user satisfaction, foster loyalty, and encourage advocacy for MChart. Retention content focuses on demonstrating ongoing value and providing opportunities for users to contribute feedback.

Quarterly Updates and Feature Rollouts:

- Content: Highlighting new features, enhancements, and success metrics to show how MChart is continuously improving.
- Target Audience: Existing users across all stakeholder groups.
- Delivery: Email updates, webinars, and in-app notifications.

User Satisfaction Surveys and Feedback Loops:

- Content: Surveys designed to gather actionable insights on user experiences and areas for improvement.
- Target Audience: All users, with tailored surveys for PHNs, LHDs, and commissions.
- Delivery: Sent via email with follow-ups to maximise response rates.

Recognition Programs and Steering Groups:

- Content: Invite influential users to join a consumer steering group to provide feedback and guide MChart's future developments. Recognise exemplary use of MChart in reports, newsletters, and social media to encourage advocacy and reward engagement.
- Target Audience: High-value users, early adopters, and thought leaders.
- Delivery: Published on the MChart website, promoted via email, and shared within the user community.

MChart's content strategy builds trust and drives adoption by tailoring communication to user needs across awareness, engagement, and retention. Testimonials, support materials, and steering groups play key roles in ensuring impact and fostering loyalty.

5.7 Operational considerations

The success of MChart's marketing is dependent on the organisation's approach to team structure. While marketing efforts could be managed internally or outsourced, this outline assumes an internal team with a strong focus on cost-effective, data-driven digital channels. Given the importance of generating content, engaging audiences, measuring effectiveness, and integrating with sales and onboarding processes, the outlined roles prioritise resources for cross-functional collaboration and advanced data analysis.

Organisational Alignment

To achieve marketing success for MChart, internal efforts should focus on:

- **Digital-First Approach:** Prioritise digital channels such as social media, blogs, and email marketing as the most cost-effective and scalable options.
- **Content-Driven Strategy:** Build a robust pipeline of engaging and educational content tailored to different audience segments, including PHNs, LHDs, and commissions.
- **Data-Driven Decision-Making:** Use analytics to refine marketing campaigns, optimise performance, and demonstrate ROI.
- **Cross-Functional Collaboration:** Ensure seamless integration between marketing, product development, sales, and onboarding processes to deliver a unified experience for clients.

Core Marketing Roles

Marketing Lead:

- Develop and oversee the overarching strategy, ensuring alignment with MChart's objectives. Manage campaign execution and coordinate with content, analytics, and sales teams.

Outcome: A cohesive marketing strategy that drives audience engagement and adoption.

Content and Social Media Specialist:

- Develop and execute a content strategy, including social media posts, blogs, infographics, webinars, and email campaigns.
- Manage MChart's presence on platforms like LinkedIn and X (Twitter), engaging with audiences, responding to queries, and amplifying key messages.
- Tailor content to resonate with key audiences, ensuring consistency across channels.

Outcome: High-quality, impactful content that educates, engages, and motivates stakeholders while increasing visibility and engagement on cost-effective digital platforms.

Marketing Data Analyst:

- Implement and maintain Google Tag Manager (GTM) and Google Analytics (GA) to track user engagement and campaign performance effectively.
- Create and manage custom reports and dashboards, most likely using Looker, to provide clear and actionable insights for stakeholders.
- Analyse data across all marketing channels to identify trends, measure ROI, and recommend optimisations for future campaigns.
- Collaborate with the content and marketing teams to ensure that data insights are incorporated into strategy and execution.

Outcome: Comprehensive, data-driven reporting that informs decisions, optimises campaigns, and demonstrates measurable impact.

Product Manager / Business Analyst:

- Act as the bridge between product and marketing teams to ensure alignment on messaging, features, and user needs.
- Collaborate with the sales team to provide technical support during pitches, demos, and onboarding processes for potential clients.
- Work directly with clients to understand their requirements and feedback, ensuring smooth onboarding and integration.
- Identify opportunities to improve the product and contribute to the overall user experience based on feedback from marketing and sales activities.

Outcome: Seamless coordination between product, marketing, and sales, enhancing the client onboarding process and supporting user satisfaction and retention.

Stakeholder Engagement Specialist:

- Collaborate with PHNs, LHDs, and commissions to build advocacy and encourage content sharing.

Outcome: Strengthened relationships with key stakeholders and increased organic reach.

Collaboration Framework

- **Internal Coordination:** Regular team meetings to align on campaign goals, product updates, and client onboarding processes.
- **Feedback Integration:** Collect and incorporate user and stakeholder feedback to refine messaging, campaigns, and product offerings.
- **Sales Support:** The Product Manager / Business Analyst plays a vital role in assisting the sales team with technical expertise and ensuring smooth client transitions from pitch to onboarding.

An effective marketing strategy for MChart requires a strong internal team with a focus on digital-first, data-driven approaches. By integrating roles like a Product Manager / Business Analyst to bridge product and marketing efforts and support sales and onboarding, the organisation ensures that every aspect of the client journey is seamless and impactful.

4.0 IMPLEMENTATION PRINCIPLES - EAST FRAMEWORK

The EAST Framework (Easy, Attractive, Social, Timely) provides a structured approach to counteract key biases identified in this document—such as status quo bias, familiarity bias, ambiguity aversion, and loss aversion—by making MChart's adoption feel seamless, reducing uncertainty, and leveraging social proof. By applying these principles to MChart's marketing strategy, the framework ensures that barriers to adoption are minimised while the platform's benefits are clearly communicated. This approach aligns with the needs of MChart's target audiences—PHNs, LHDs, and commissions—encouraging engagement and uptake.

The EAST Framework (Easy, Attractive, Social, Timely) is designed to simplify behavioural change and influence decision-making. By applying these principles to MChart's marketing strategy, the framework ensures that barriers to adoption are minimised while the platform's benefits are clearly communicated. This approach aligns with the needs of MChart's target audiences—PHNs, LHDs, and commissions—encouraging engagement and uptake.

Easy: Simplify Adoption

Intuitive Onboarding:

Simplify the setup process with guided tutorials, personalised dashboards, and a dedicated support team for onboarding. Provide an assisted trial program to help users navigate the platform, addressing concerns about time and resource constraints.

Seamless Integration:

Highlight how MChart complements existing federal platforms, ensuring minimal disruption to current workflows. Offer integration guides and support to alleviate IT resistance and demonstrate compatibility with existing systems.

Clear Messaging:

Use straightforward, jargon-free language in marketing materials to ensure accessibility for all stakeholders. Create step-by-step resources that explain MChart's features and benefits concisely.

Attractive: Showcase Tangible Benefits

Highlight Outcomes:

- Emphasise measurable results, such as improved resource allocation, time savings, and mental health outcomes.
- Use case studies and success stories to demonstrate the real-world impact of MChart.

Visual Appeal:

- Incorporate infographics and video content into marketing to capture attention and simplify complex information.
- Ensure the platform's interface is aesthetically pleasing, reinforcing its usability and professionalism.

Incentives:

- Offer a free trial period to reduce risk and allow users to experience the platform's value firsthand.
- Provide exclusive features or extended trial periods for early adopters to encourage advocacy.

Social: Leverage Peer Influence

Testimonials and Endorsements:

- Share testimonials from early adopters, particularly influential figures in PHNs, LHDs, and commissions.
- Highlight peer success stories to build trust and credibility within stakeholder groups.

Collaborative Events:

- Host webinars and workshops featuring industry voices to discuss MChart's benefits and practical applications.

- Use these events to foster a sense of community among users, encouraging knowledge-sharing and collaboration.

User Communities:

- Create online communities or steering groups where users can exchange ideas, share tips, and provide feedback.
- Encourage active participation to build social proof and reinforce the platform's value.

Timely: Sync with Decision Cycles

Planning and Funding Cycles:

- Time marketing efforts to align with key decision-making periods, e.g. planning or funding allocation windows.
- Provide tailored messaging that addresses immediate needs during these critical times.

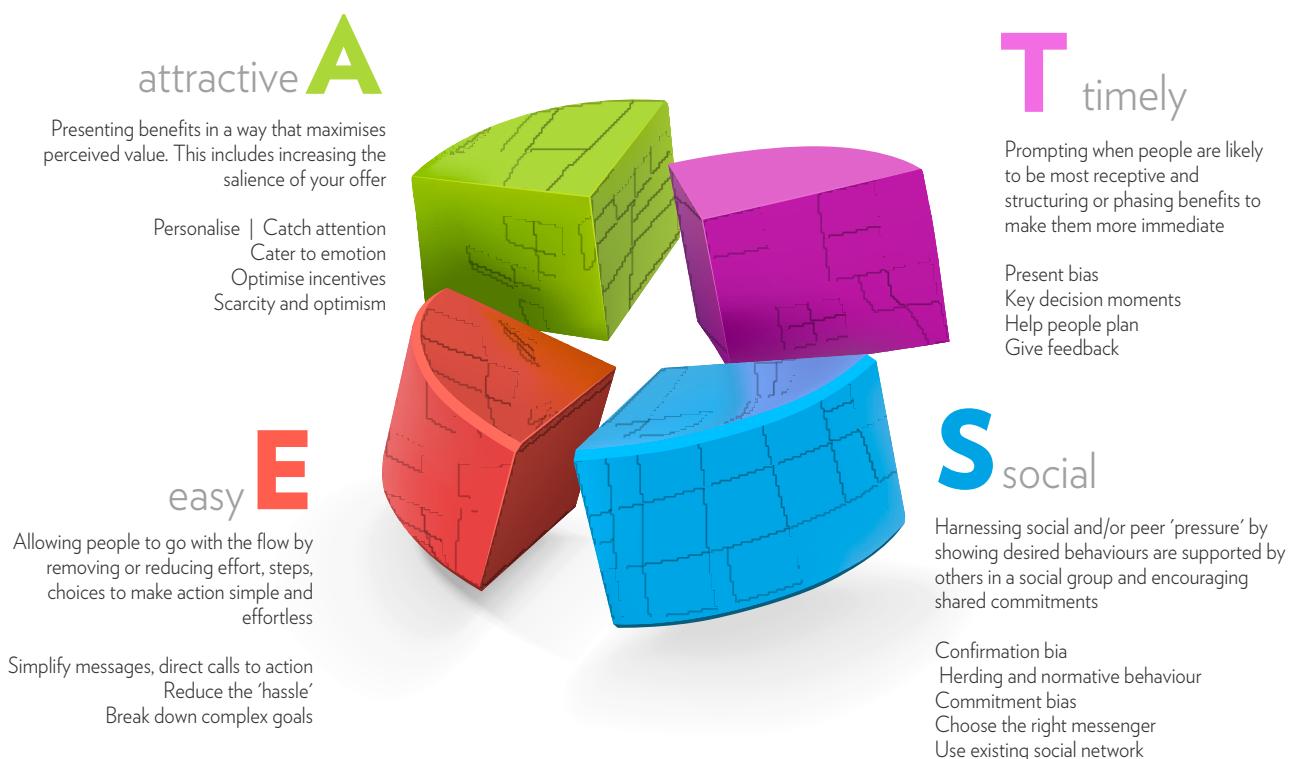
Follow-Up Communications:

- Use reminders and retargeting campaigns to re-engage users who show initial interest but have yet to commit.
- Ensure timely responses to inquiries and proactive outreach to maintain momentum.

Iterative Updates:

- Regularly release updates and enhancements to keep users engaged and demonstrate MChart's evolution.
- Share updates at intervals that align with stakeholders' workflows, reinforcing its relevance.

By applying the EAST Framework, MChart's marketing strategy addresses common barriers to adoption and positions the platform as an accessible, compelling, and timely solution. This framework ensures that all marketing efforts resonate with stakeholders, driving both initial engagement and sustained usage.



5.0 ENSURING STAGE PROGRESSION THE MOA FRAMEWORK

The MOA (Motivation-Opportunity-Ability) framework ensures that consumers can progress through each stage of the purchase funnel by identifying and addressing potential barriers to adoption. It enables the marketing team to pinpoint likely roadblocks—whether motivational, environmental, or capability-related—and proactively develop strategies to smooth the transition from awareness to adoption. By focusing on how users perceive value, access resources, and develop confidence in their ability to engage with MChart, MOA helps refine messaging, trial structures, and support mechanisms to optimise the user journey.

The MOA framework is a proven tool for understanding and influencing decision-making, balancing three fundamental needs: Motivation, Opportunity, and Ability. By addressing these elements, MChart's marketing strategy can drive adoption, align with user expectations, and create a seamless path to implementation. This approach has been successfully applied in diverse contexts, including branding, customer value propositions (CVP), product development, and communication strategies, making it ideal for navigating the complexities of mental health planning.

Motivation: Driving Willingness to Act

Motivation reflects the emotional and logical drivers that encourage stakeholders to adopt MChart. These include belief in its capabilities, alignment with organisational goals, and the perceived value it brings.

Logical and Emotional Drivers:

- Highlight measurable benefits like improved resource allocation and planning efficiencies to appeal to logical motivations.
- Use testimonials and case studies to foster emotional connections, demonstrating MChart's impact on systemic outcomes and individual goals.

Reducing Resistance:

- Counteract status quo bias by positioning MChart as an enhancement to existing tools, reducing perceived risks of change.
- Incentivise early adoption with free trials or exclusive features, framing the decision as an opportunity rather than a disruption.

Opportunity: Enabling Action Through Context

Opportunity focuses on creating an environment that supports and enables stakeholders to engage with MChart. This includes access to resources, integration support, and aligning marketing efforts with key decision-making cycles.

Accessible and Inclusive Design:

- Ensure MChart integrates seamlessly into existing workflows, minimising disruption and addressing IT concerns.
- Provide tailored resources, including technical documentation and onboarding guides, to support operational and technical stakeholders.

Leveraging Timing and Social Contexts:

- Align marketing efforts with annual planning and funding cycles to ensure relevance during decision-making windows.
- Highlight peer adoption and endorsements to create social proof, encouraging broader uptake.

Ability: Empowering Users to Adopt

Ability represents the skills, knowledge, and confidence users need to engage with MChart effectively. It ensures that stakeholders can use the platform efficiently and see its value in their context.

Empowering Through Education:

- Offer comprehensive training materials, including tutorials, webinars, and live demonstrations tailored to the specific needs of PHNs, LHDs, and commissions.
- Build ongoing support channels, such as a user knowledge base and dedicated assistance during onboarding.

Addressing Bias and Confidence Gaps:

- Counter the Dunning-Kruger effect and other biases by presenting MChart's advanced capabilities in an approachable manner.
- Reinforce learning through user-friendly tools, ensuring all stakeholders feel confident in adopting the platform.

Integrating Bias Mapping into MOA

Recognising the influence of cognitive biases such as status quo bias, availability heuristics, and optimism bias, the MOA framework can be adapted to address these challenges. For example:

- Use targeted messaging to overcome groupthink and align stakeholders on MChart's unique benefits.
- Present data-driven comparisons to counter biases rooted in overconfidence in existing systems.

MOA applied to the competitor landscape.

The MOA framework provides a structured approach to understanding why consumers choose competitor products, identifying gaps in competitor offerings, and developing targeted strategies to position MChart as the superior choice. By analysing how MChart aligns with or surpasses competitors in motivational appeal, accessibility (opportunity), and usability (ability), the marketing team can refine messaging, improve engagement strategies, and remove barriers to adoption.

1. Motivation – Why do users choose competitor products?

Competitors may attract users by appealing to habit, brand familiarity, perceived trustworthiness, or existing contracts. Understanding the emotional and rational drivers behind these choices is key to repositioning MChart as the better alternative.

How MOA helps overcome competitor products:

- Identify emotional drivers: If a competitor is perceived as the 'default' option, leverage status quo bias by demonstrating how MChart improves efficiency without disrupting workflows.
- Differentiate on value: Emphasise tangible benefits that competitors lack, such as better integration, real-time insights, and data validation tools.
- Leverage urgency: Use time-sensitive incentives (e.g., assisted trial, early-adopter benefits) to encourage switching.

2. Opportunity – What environmental factors support competitor adoption?

Users may default to a competitor due to existing procurement contracts, industry partnerships, or a lack of awareness about alternative solutions. Some competitors may be deeply embedded in regulatory frameworks or have a perceived first-mover advantage.

How MOA helps overcome competitor products:

- Strategic partnerships: Secure endorsements from industry leaders, government bodies, or peak health organisations to match competitors' credibility.

- Ease of access: Ensure MChart is priced and positioned competitively, with flexible purchasing models that reduce switching costs.
- Integration strategies: Demonstrate that MChart can seamlessly integrate into existing systems, reducing friction in migration.
- Private sector fit: Align with private networks, such as Bupa, by offering MChart as a scalable planning tool for clinic coordination and service expansion.

3. Ability – What skill gaps or resource limitations prevent users from switching?

Even if users see the benefits of MChart, they may feel ill-equipped to transition due to perceived complexity, lack of training, or IT barriers. Competitors with simpler user experiences or long-standing adoption within teams may hold an advantage in this area.

How MOA helps overcome competitor products:

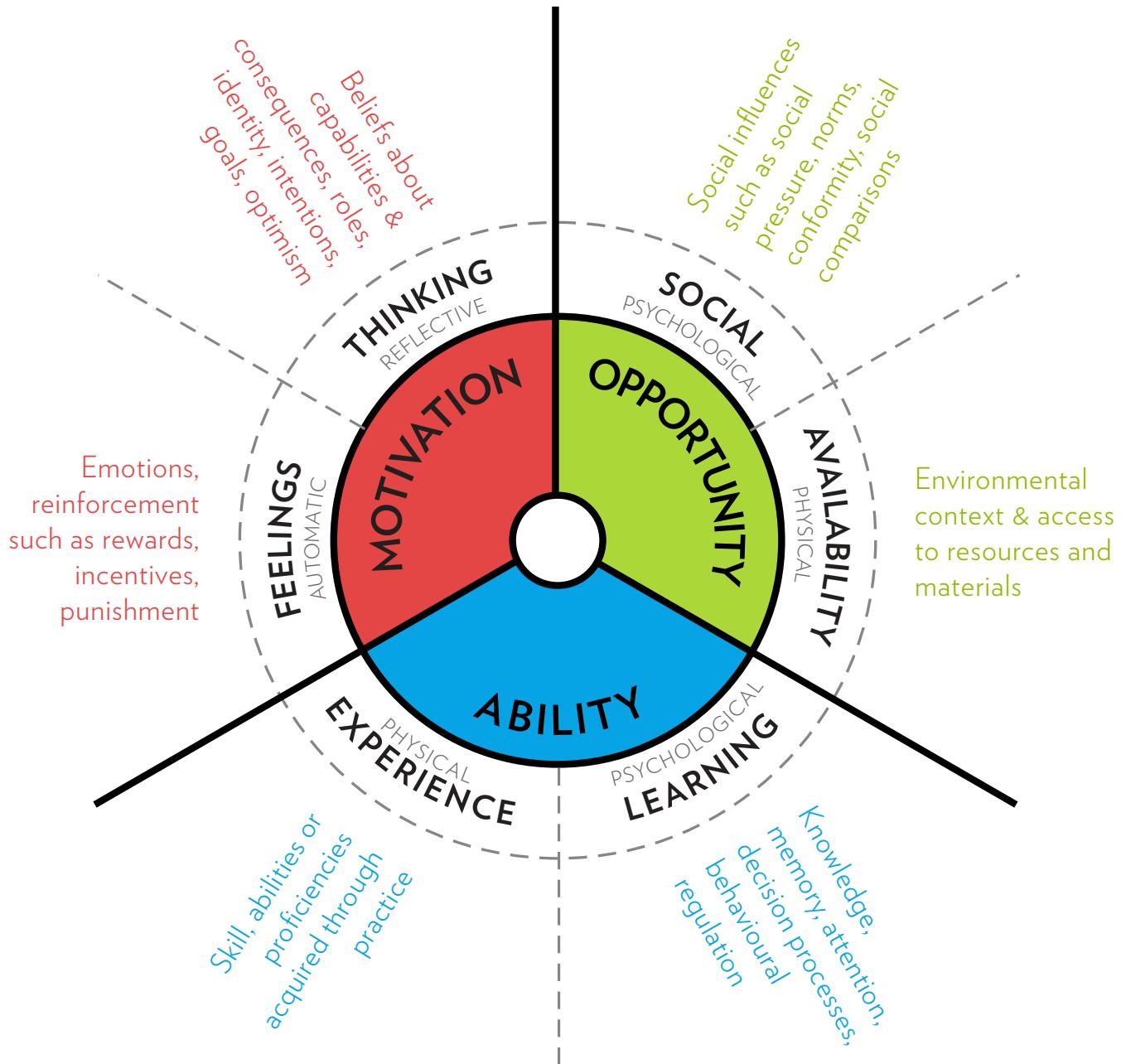
- Reduce perceived complexity: Position MChart as an intuitive, low-disruption tool, with custom dashboards and role-specific interfaces.
- Offer hands-on onboarding: Provide assisted trials and dedicated support teams to smooth the learning curve.
- Train-the-trainer model: Equip key users within organisations to become internal champions who advocate for adoption.

Using MOA to Strengthen Competitive Positioning

By applying MOA to competitor analysis, the marketing team can:

- Map competitor strengths and weaknesses against MChart's value proposition.
- Identify pain points that competitors fail to address and position MChart as the solution.
- Develop targeted marketing messages that resonate with users based on their decision-making process.
- Implement strategic nudges to shift users away from competitors and towards MChart.

The MOA framework ensures that MChart's marketing strategy is comprehensive, addressing the key drivers of behaviour: motivation, opportunity, and ability. By focusing on both logical and emotional engagement, creating supportive contexts, and empowering users, the strategy builds a pathway to adoption and long-term success.



6.0 MEDIA PURPOSE QUADRANT MODEL

The Media Purpose Quadrant Model provides a structured way to allocate marketing resources by categorising efforts into four key areas. While mChart is a niche product, this model focuses on reaching sub-niches e.g. PHNs & LHDs to drive targeted adoption. The framework balances awareness-building with performance comms to maximise impact.

The Four Quadrants

Brand Building:

- Focuses on creating awareness and establishing MChart as a trusted name in mental health planning.
- Channels here drive emotional connection and familiarity.
- Examples: Out-of-Home (OOH), radio, organic social media.

Niche Marketing:

- Targets specific sub-niches within the broader audience, addressing tailored pain points and use cases.
- Helps build deeper relevance for PHNs, LHDs, and commissions.
- Examples: Personalised email campaigns, LinkedIn ads, industry webinars.

Brand Realisation:

- Bridges awareness and action, turning interest into meaningful engagement or inquiry.
- Encourages audiences to explore MChart further through informative and educational content.
- Examples: Thought leadership articles, case studies, educational blogs.

Performance:

- Drives measurable outcomes such as trial sign-ups, product inquiries, or adoption.
- Focuses on highly targeted campaigns with clear calls to action.
- Examples: Retargeting campaigns, paid search ads, performance tracking tools like Looker.

How to Apply the Model for MChart

Start with Brand Building:

Begin with broad awareness campaigns to establish MChart's presence and credibility. Use emotionally resonant messaging that highlights its impact on mental health planning.

Target Sub-Niches with Niche Marketing:

Tailor campaigns to address specific needs of PHNs, LHDs, and commissions, ensuring relevance at every level of the marketing funnel.

Shift to Brand Realisation:

Provide educational and informative content that deepens understanding and addresses barriers to adoption. This step helps stakeholders see how MChart aligns with their workflows.

Focus on Performance:

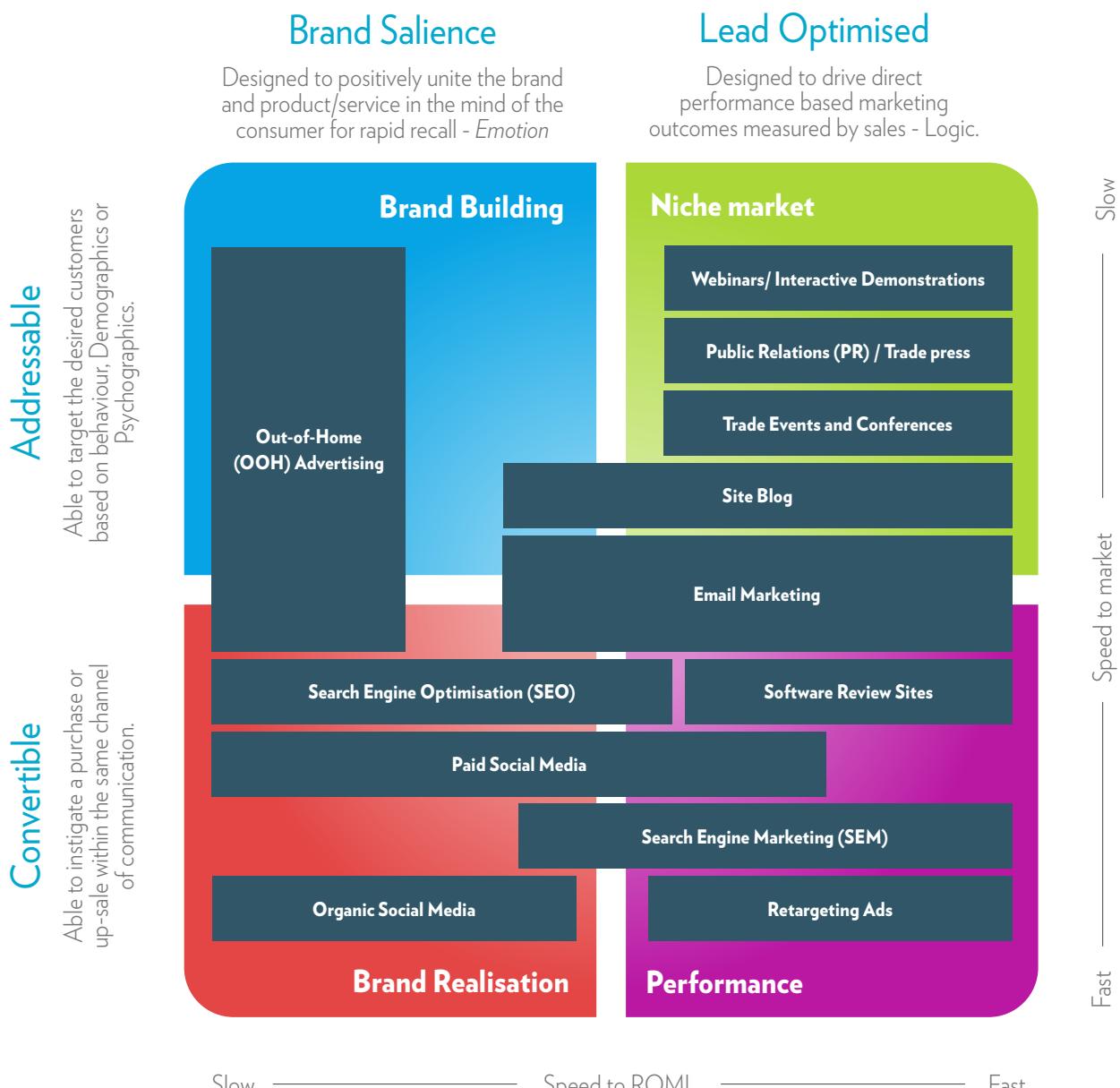
Use data-driven campaigns to convert interest into action, whether through trial sign-ups or direct inquiries. Emphasise measurable benefits and user-friendly onboarding.

6.1 The Four Quadrants with media recommendations

More details of individual media choices can be found in the section '10.0 Funnel Strategy'.

This media model aligns closely with the concept of a buying centre, where multiple stakeholders—such as users, influencers, decision-makers, and budget holders—collectively shape the purchasing process. Channels in the “Lead Optimised” and “Convertible” zones, such as email marketing, SEM, and retargeting ads, offer the precision needed to tailor messaging to specific buying personas within this group.

For example, product benefit messaging can be directed at technical evaluators, while value and ROI framing can target budget holders. Meanwhile, broader channels in the “Brand Building” and “Addressable” space, like PR or trade events, help build overall category awareness and credibility across the entire buying centre. This integrated approach ensures that communication is both strategically positioned and persona-relevant, enhancing effectiveness throughout the decision journey.



7.0 STRATEGIES FOR MCHART

The following strategies are practical examples designed to illustrate how the principles of the EAST Framework, MOA Framework, and Media Purpose Quadrant Model can be applied to MChart's marketing efforts. While not exhaustive, they provide a foundation for crafting targeted and effective campaigns. These strategies align with the core models to address awareness, engagement, and adoption challenges and can be tailored further to meet specific audience needs or market dynamics.

Strategy	Alignment with objectives		
	Usefulness	Adoption	Penetration
Offer a free 12-month trial to early adopters to encourage initial use and gather feedback.	5	5	4
Partner with philanthropies to subsidise access, reducing cost barriers for key stakeholders.	3	3	2
Create an intuitive onboarding experience with guided tutorials, personalised dashboards, and dedicated support to simplify adoption.	5	5	5
Use testimonials from influential early adopters to build trust and credibility among decision-makers.	4	3	2
Time campaigns to align with annual planning and funding cycles for PHNs and LHDs, ensuring relevance during critical decision periods.	3	3	3
Host webinars featuring respected industry voices to showcase MChart's benefits and foster community engagement.	3	2	2
Highlight tangible outcomes in marketing materials, such as improved resource allocation and ROI, to appeal to both logical and emotional motivations.	4	3	2
Provide a dedicated support team for assisted trials, addressing concerns about time and resource constraints during testing phases.	5	5	4
Develop targeted messaging for IT and operational teams to address technical integration concerns and build confidence in MChart's compatibility.	5	5	4
Use data-driven insights to challenge status quo bias, emphasising MChart's value over existing tools.	4	3	2
Share success stories and user testimonials on organic social media to build awareness and foster brand salience.	3	3	2
Launch targeted LinkedIn campaigns aimed at sub-niches within PHNs, LHDs, and commissions to address specific pain points.	3	2	2
Develop retargeting ads to re-engage stakeholders who have interacted with MChart but haven't taken further action.	2	3	2
Publish thought leadership articles and case studies on platforms relevant to mental health planning to drive deeper engagement.	3	2	2
Run paid search campaigns with high-intent keywords to capture leads during the decision-making process.	2	3	2
Use segmented email campaigns to deliver tailored insights and updates based on stakeholder needs.	3	3	2
Organise role-specific workshops and educational content to empower users with the skills and confidence to maximise MChart's features.	5	5	4

These strategies provide a roadmap for using the guiding models to effectively market MChart, ensuring alignment with the platform's goals and the needs of its diverse stakeholders.

8.0 FUNNEL STRATEGY

The marketing funnel provides a streamlined framework to guide stakeholders through their engagement with MChart, covering four key stages: Attract, Engage, Transact, and Retain. Each stage aligns marketing activities with audience behaviours and organisational objectives, ensuring a data-driven approach to driving adoption and fostering long-term loyalty. By integrating marketing measurements and GiAF insights, the funnel ensures consistent progress while identifying opportunities for optimisation.

8.1 Stages of the Funnel

Attract (*Attract*)

Build awareness and generate interest in MChart by positioning it as a valuable solution for mental health planning.

Activities:

- Brand-building campaigns using organic social media, OOH, and thought leadership content.
- Develop a strong, relatable value proposition to engage potential users.

Measurement: Brand awareness metrics, including impressions, reach, and social engagement.

Engage (*Imagine, Explore*)

Deepen interest and demonstrate MChart's value to stakeholders.

Activities:

- Webinars, interactive demos, and case studies highlighting MChart's impact.
- Retargeting campaigns and tailored email communications addressing specific stakeholder needs.

Measurement: Engagement metrics such as content downloads, webinars, and time spent interacting with resources.

Key Moment of Truth:

ZMOT (Zero Moment of Truth): This marks the transition from Engage to Transact, as stakeholders move from exploring options to committing to a purchase decision. Measurements should be implemented to identify the most effective channel and comms that deliver the ZMOT.

Transact (*Transact, Implement*)

Convert interest into action by facilitating trial sign-ups or purchases and ensuring a smooth onboarding experience.

Activities:

- Paid search campaigns targeting high-intent keywords.
- Dedicated trial support to assist with onboarding and integration.
- Personalised outreach to decision-makers with tailored proposals.

Measurement: Conversion metrics, including trial sign-ups, PPC performance, and onboarding success rates.

Retain (*Utilise, Reconsider, Maintain*)

Foster loyalty and long-term usage by delivering ongoing value and addressing user needs.

Activities:

- Customer satisfaction surveys, training webinars, and feature update communications.
- Win-back campaigns targeting users who have disengaged.
- Establish feedback loops to gather insights and drive continuous improvement.

Measurement: Net Promoter Scores (NPS), active usage rates, retention rates, and re-engagement success.

8.2 Integrating Marketing and GiAF Measurements

Each stage of the funnel is supported by a blend of marketing and GiAF measurements to optimise outcomes:

Marketing Measurements:

Track progression with metrics like awareness (reach, impressions), engagement (clicks, shares), and conversions (PPC performance, sign-ups).

GiAF Measurements:

Assess broader impact through allocation, adoption, penetration, and assimilation to ensure alignment with strategic goals.

This consolidated funnel structure ensures that marketing, sales, and support efforts are aligned, guiding stakeholders from initial awareness to long-term retention. By combining targeted activities, measurable outcomes, and data-driven insights, the funnel framework supports MChart's mission to drive adoption and impact in mental health planning. ZMOT plays a pivotal role in ensuring marketing strategies effectively transition stakeholders from exploration to commitment.

9.0 ROADMAP AND NEXT STEPS

The roadmap outlines the critical milestones and actionable next steps for implementing MChart's marketing strategy. This phased approach ensures a structured, iterative rollout, enabling the team to refine tactics based on real-world feedback and maximise impact.

9.1 Phase 1: Pilot and Refinement (0-6 Months)

Objective: Establish MChart's viability and refine the platform based on early feedback.

Activities:

- Launch a targeted pilot program in the ACT, focusing on PHNs, LHDs, and commissions.
- Provide a free 6 or 12-month trial for early adopters with dedicated support to address onboarding challenges.
- Gather user feedback through surveys and direct interviews to identify barriers and opportunities for improvement.
- Begin small-scale brand-building campaigns, including a preliminary creative campaign to establish awareness.
- Develop foundational marketing assets, such as a website and email campaigns.

Deliverables:

- Refined product features based on user input.
- Initial case studies and testimonials to use in broader marketing efforts.
- Branding and foundational marketing channels (website, social media, email).
- Detailed performance analysis from pilot programs to inform the next phases.

Relevant Marketing Channels and Tactics

- **Branding:** Finalise visual identity, messaging, and value propositions for the pilot audience.
- **Website:** Launch a basic but functional site featuring MChart's core features, pilot updates, and trial sign-ups.
- **Social Media:** Establish profiles on LinkedIn and Twitter (X) to share updates and engage early adopters.
- **Email Marketing:** Target potential pilot participants with personalised invitations and updates.
- **Creative Campaign:** Create introductory campaign materials highlighting MChart's unique benefits.

9.2 Phase 2: Regional Expansion (6-12 Months)

Objective: Broaden adoption beyond the ACT by targeting additional regions and stakeholders.

Activities:

- Leverage pilot program insights to adapt messaging and refine marketing materials for broader regional outreach.
- Implement targeted marketing campaigns using paid social, SEO-optimised content, and PR efforts to drive awareness.
- Develop additional role-specific educational materials (e.g., for IT and operational teams) to address integration concerns.
- Partner with professional conferences to present MChart as an industry-leading solution.

Deliverables:

- Scaled marketing strategy based on proven pilot results.
- Expanded early adopter base across key regions.
- Partnerships with professional networks and organisations to amplify reach.

Relevant Marketing Channels and Tactics

- **Branding:** Update messaging to reflect pilot success stories and case studies.
- **Website:** Add SEO-optimised content and resources such as user guides and educational materials.
- **Social Media:** Launch targeted regional campaigns on LinkedIn to reach key decision-makers.
- **Email Marketing:** Expand outreach with segmented campaigns based on stakeholder roles and regions.
- **Creative Campaign:** Build on the introductory campaign with a focus on regional success and tangible outcomes.
- **PR:** Begin engaging industry media to highlight pilot results and early successes.
- **SEM:** Develop regional keyword strategies to enhance visibility.

9.3 Phase 3: National Rollout (12-24 Months)

Objective: Establish MChart as the leading mental health navigation tool across Australia.

Activities:

- Launch a comprehensive targeted national branding and creative campaign to position MChart as the go-to solution for mental health planning.
- Expand SEO and SEM efforts to drive traffic and improve search visibility.
- Build relationships with government and industry bodies to integrate MChart into broader mental health planning frameworks.
- Scale email marketing efforts to engage decision-makers with tailored insights and updates.
- Engage a dedicated PR strategy to secure media coverage in relevant publications and increase visibility.

Deliverables:

- High adoption rates among PHNs and LHDs nationwide.
- Increased visibility through national campaigns and PR efforts.
- Recognition as a trusted and indispensable planning tool.

Relevant Marketing Channels and Tactics

- **Branding:** Refine messaging to reflect national relevance and credibility.
- **Website:** Add advanced resources such as ROI calculators, whitepapers, and integration guides.
- **Social Media:** Run high-impact campaigns showcasing national adoption and key benefits.
- **Email Marketing:** Launch a series of national campaigns focusing on case studies and ROI.
- **Creative Campaign:** Execute a multichannel campaign featuring testimonials and key metrics.
- **PR:** Target national media to amplify visibility and credibility.
- **SEO and SEM:** Scale efforts with comprehensive keyword strategies and high-budget campaigns.

9.4 Phase 4: Adjacent Sector Expansion (24-36 Months)

Objective: Adapt MChart for use in adjacent sectors like housing, disability services, and education.

Activities:

- Explore the needs of new markets through commissioned research and focus groups.
- Tailor the platform's features and messaging to align with the specific challenges of new sectors.
- Launch pilot programs in selected sectors to validate the expanded use case.
- Adapt branding and creative campaigns to highlight sector-specific benefits.

Deliverables:

- New sector-specific case studies to demonstrate applicability and impact.
- Diversified revenue streams and increased user base.

Relevant Marketing Channels and Tactics

- **Branding:** Adjust messaging to highlight sector-specific benefits and solutions.
- **Website:** Add new sector pages and case studies tailored to emerging markets.
- **Social Media:** Launch campaigns targeting key players in adjacent sectors.
- **Email Marketing:** Expand segmentation to address the unique needs of new markets.
- **Creative Campaign:** Develop new campaigns showcasing MChart's adaptability to multiple sectors.
- **PR:** Highlight cross-sector adoption through industry-specific media outlets.
- **SEO and SEM:** Optimise for sector-specific keywords and audience behaviours.

This roadmap provides a structured and actionable plan for MChart's growth, supported by practical and targeted marketing efforts at every stage. By leveraging branding, digital marketing channels, creative campaigns, and PR strategies, MChart can achieve widespread adoption and brand recognition.

10. BIAS ANALYSIS: OVERVIEW AND SOURCES

This analysis draws on feedback from the MChart steering committee, including insights from expert panels through transcripts, meeting notes, and surveys. It highlights potential behavioural tendencies and biases that may affect MChart's adoption and perception, guiding strategies to address these challenges and optimise market uptake.

The total number of contributors is c.12, and therefore, this research should be reviewed as qualitative.

Familiarity Bias (Count: 4); *The tendency to prefer known, familiar options over new or unfamiliar alternatives.*

- Some panellists showed a preference for established tools and traditional methods of managing comorbidities, reflecting a reliance on familiar systems like NMHSPF. This inclination could challenge the adoption of MChart as an innovative alternative. Positioning MChart as a complementary tool rather than a replacement could mitigate this bias.

Status Quo Bias (Count: 3); *The tendency to resist change and stick with current or existing methods.*

- Discussions often revolved around existing workflows and challenges in addressing complex issues like comorbidities, suggesting a tendency to stick with current processes despite the benefits of integrated tools like MChart. Emphasising seamless integration with these workflows can help overcome resistance.

Ambiguity Aversion (Count: 3); *The preference for known outcomes over uncertain or ambiguous ones.*

- Complexities such as shared biological pathways and socio-environmental factors might create hesitation among some panellists regarding MChart's ability to manage or represent such data clearly. Providing comprehensive user guides and an intuitive interface is crucial to address this bias.

Overconfidence in Data Accuracy (Count: 2); *The belief that available data is more reliable than it may actually be.*

- The focus on data accuracy in areas like comorbidities might lead to unrealistic expectations about MChart's capabilities. Setting clear expectations about the tool's data limitations and update processes will be essential.

Anchoring Bias (Count: 2); *The reliance on initial information or reference points when making decisions.*

- Some panellists anchored their evaluations of MChart to existing frameworks like NMHSPF or methods used in managing physical and mental health comorbidities. Highlighting MChart's unique strengths and innovations beyond these benchmarks will be important.

Confirmation Bias (Count: 2); *The tendency to focus on information that confirms existing beliefs or opinions.*

- Focus on specific aspects of comorbidities, such as socioeconomic impacts or pharmacotherapy, might have led panellists to view MChart through a narrow lens of its potential utility. Demonstrating versatility and broader use cases can mitigate this.

Loss Aversion (Count: 2); *The fear of potential losses being more impactful than equivalent gains.*

- Concerns about missing or incomplete data when dealing with sensitive health topics like comorbidities could lead to a fear of eroding trust in MChart. Emphasising robust data validation processes and transparency will help address this bias.

Social Proof (Count: 1); *The inclination to adopt behaviours or decisions based on what others are doing.*

- References to widely adopted practices or tools, such as collaborative care models and digital technologies, indicated the potential influence of perceived endorsement. Leveraging testimonials and case studies will enhance MChart's credibility.

Groupthink (Count: 1); *The tendency for group consensus to suppress dissenting opinions or alternative ideas.*

- Consensus-driven discussions about best practices for comorbidity management may have limited exploration of critical feedback or alternative perspectives. Encouraging anonymous feedback and independent reviews could uncover hidden insights.

Optimism Bias (Count: 1); *The belief that outcomes will be more positive or ideal than is realistically likely.*

- Some panellists expressed high expectations for transformative solutions to comorbidity management, which might lead to overestimating MChart's immediate impact. Realistic portrayals of the tool's capabilities will temper expectations and build satisfaction.

A. APPENDICES - TBC

Holbrook's (2006) Customer Value Framework

		Extrinsic	Intrinsic
		<i>Economic Value</i>	<i>Hedonic Value</i>
Self-oriented	Active	Efficiency [I/O Ratio]	Play [Fun & Leisure]
	Reactive	Excellence [Quality]	Aesthetics [Beauty]
		<i>Social Value</i>	<i>Altruistic Value</i>
Other-oriented	Active	Status [Impression]	Ethics [Justice/Morality]
	Reactive	Esteem [Possessions]	Spirituality [Sacredness]

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