

Valley Health Plan

Request for Proposal eRFP-VHP-FY24-0338 Marketing & Communication Services

Vendor Finalist Presentation Guidelines

COUNTY OF SANTA CLARA DBA VALLEY HEALTH PLAN

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REQUEST FOR PROPOSAL #eRFP-VHP-FY24-0338
MARKETING AND COMMUNICATIONS SERVICES
FOR VALLEY HEALTH PLAN

VENDOR FINALIST PRESENTATION GUIDELINES

Vendor will have 90 minutes to present followed by 30 minutes for Q&A.

Presentation Requests:

1.	How would you create an open enrollment period campaign to position VHP in the Covered California market for enrollment, renewal, and retention?
2.	Demo the lifecycle of #1 from a potential customers point of view.
3.	How would your agency work with VHP to create a marketing strategy for Covered California open enrollment period in terms of project management? Discuss the logic, timeline, review, feedback, and deployment – if applicable share what tools your agency utilizes. If you have (a) tool(s), will it/they be interactive with VHP.
4.	How would you create a special enrollment period campaign to position VHP in the Covered California market for enrollment?
5.	How would you create a program launch for Santa Clara County's Primary Care Access Program (PCAP)? PCAP - Site Name - County of Santa Clara (sccgov.org) . Describe your marketing strategy campaigning on behalf of county. How would you expand enrollment and target guidelines?
6.	How would you create a program launch for Santa Clara County's MedAssist program? MedAssist program Valley Health Plan VHP . Describe your marketing strategy campaigning on behalf of county. How would you expand enrollment and target guidelines?
7.	Share reporting and evaluation used in past client relationships. How was the marketing modified based on their feedback. Include Before & After's.
8.	Present on how you worked with past clients to comply with federal regulatory entities and marketing guidelines.
9.	How has your agency used social media to interact with, enroll, and engage with persons from different socio-economic and cultural backgrounds?
10.	Share examples where your agency created project(s)/campaign(s) for influencers and/or referral sources vs end user consumers for Open Enrollment, Special Enrollment, and any other County/Government Healthcare programs, such as PCAP/MedAssist.
11.	Present how your agency would leverage earned media towards VHPs marketing objectives.

Intro and Presentation: Up To 90 Minutes

Q&A: Up To 30 Minutes

Special Considerations: Vendor may be asked to provide a copy of their presentation and related material(s).

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PRESENTATION REQUESTS

1.

How would you create an open enrollment period campaign to position VHP in the Covered California market for enrollment, renewal, and retention?

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Competing in the Covered California market requires different strategies depending on when a member or shopper first interacts with VHP, and what their shopping style is when it comes to health insurance. Our assumption is that there are different types of shoppers, which fall into any number of these descriptions:

1. Some already have an insurance plan through Covered California, and are searching for something different or better; others will be enrolling in insurance coverage through Covered California due to a major life change (though this may not happen during open enrollment).
2. Some will exclusively use the Covered California website to learn about different plans; others will see additional marketing from VHP and other insurance providers outside of the Covered California website.
3. Some will make decisions based solely on the bottom line; others will look more carefully into specific insurance providers and make decisions influenced by their emotions.

As we do not have the specifics needed to strategize a campaign at this juncture, we will walk you through our thought process and some of the factors that must be considered in designing such a campaign.

Discovery and Background

Before devising an open enrollment campaign, a few key considerations need to be addressed:

- **What are our goals in terms of enrollment, renewals, and retention?**
- **Who is the target audience for each of the key goals: enroll, renew, and retain?**
 - The answer to this will need to include demographic information (age, income, race, ethnicity, zip code, etc.), details about the audience's perceptions of healthcare and knowledge of health insurance, the audience's familiarity with VHP and its main competitors (Anthem, Kaiser, Blue Shield, etc.), family size, influences in decision making, and more.
 - There will likely be multiple target audiences, and distinctions between them should be highlighted for maximum effectiveness.

1. (CONT.)

- **What is VHP's position in the marketplace from a brand perception standpoint?**
Additionally, how does that position differ for those already enrolled with VHP versus shoppers who are currently enrolled with a different insurance provider?
- **What are the differences in VHP's offerings?**
This question seeks to understand differences in VHP's plans' attributes, but also in how those attributes add value to the consumers' lives in real and meaningful ways. For example, VHP is a locally based plan; what does that mean for the consumer?
- **Who are key messengers that shoppers may interact with, such as providers, community service organizations, brokers, and more, and how can we support those stakeholders in their understanding of VHP and its value?**

We would gather the above information through market research, audience analysis, stakeholder interviews, and a thorough audit of VHP's existing marketing materials and those of its competitors.

Strategy

Once we have all of the above information, we would likely create a multi-pronged campaign to meet different audiences and reach different goals. Audiences should be segmented as granularly as possible within the scope of the campaign budget and reach.

For example, messaging encouraging retention would likely be different from messaging introducing new shoppers to VHP for the first time, and delivery mechanisms for that messaging would certainly vary. However, all messaging should be aligned and work harmoniously together. Additionally, some materials will need to speak to all audiences, such as plan brochures that can be uploaded to the Covered California website:

Group 1: 2 Members 94088 \$100,000 Preferences

VHP Valley Health Plan
Valley Health
Bronze 60 HMO
BRONZE
Choose Plan

Quick Navigation
Key costs and features
Monthly premium

Key Costs and Features

This summary shows the health plan's coverage and costs. For more details, use the left-side menu or the Summary of Benefits and Coverage (SBC).
[Download the Summary of Benefits and Coverage \(SBC\)](#) [View the plan brochure](#)

Monthly premium	\$212.68999999999994 /month
Yearly deductible ⓘ	\$6300 /year (Individual) \$12600 /year (Family)
Out-of-pocket ⓘ	\$9100 /year (Individual) \$18200 /year (Family)

1. (CONT.)

A major consideration when developing the campaign strategy is accessibility. As Covered California is a marketplace for all Californians, it is critical that the messaging promoting VHP is easy to understand and accessible for people from all walks of life. It also needs to be able to be transcreated into VHP's threshold languages.

Accessibility is also an important factor in the world of health insurance, which is notoriously overwhelming and confusing for consumers. Rather than messaging specific technical details of VHP's coverage, an open enrollment campaign should focus on the ways in which VHP alleviates the emotional stress associated with shopping for (and utilizing) health insurance. For example, some of the emotional responses the campaign may want to elicit could include:

- Trust
- Relief
- Ease
- Human connection
- Simplicity
- Local understanding
- Fairness

These qualities are especially important for historically marginalized and oppressed communities who may be accustomed to (and worn down by) navigating increasingly complex systems to have their basic needs met. For these populations in particular, providing basic education on the tax credit available to those with qualifying incomes may help build trust with VHP, but the messaging must not get too technical.

Crafting a strategy for the campaign would include answering all the questions in the Discovery and Background section above, and then defining key messages and determining the best ways in which to deliver those messages, including channels, calls to action, cadence, and more. Note that crafting message delivery may include more indirect strategies such as collaborating with brokers, medical providers, community-based organizations, and more.

Timing and Execution

We would recommend the open enrollment campaign start at least 3 month ahead of the beginning of the open enrollment period. Ideally, when open enrollment begins, shoppers will be well primed to choose VHP. The Covered California website allows shoppers to explore plans even outside of open enrollment, and VHP's messaging should assist shoppers with

1. (CONT.)

the process early and often. We would likely recommend the campaign peak during open enrollment. (Again, actual recommendations and strategies would be contingent upon the results of a thorough discovery process.)

Different tactics will be devised based on the strategy created. One tactic, for example, may be a drip email campaign, helping shoppers start to think about open enrollment in small, digestible, personal ways before the enrollment period begins. Another tactic to reach current VHP members may be to invite conversation with a customer service representative to help members understand how they can best optimize use of their health insurance and the additional programs VHP offers (such as its fitness and nutrition classes), prior to open enrollment.

Prior to executing on the campaign, outcome measurements should be developed based on VHP's overarching business goals. Throughout the campaign, data should be collected to inform analysis of the campaign's success and ROI, which can be distilled into learnings for future campaigns.

Once shoppers have become members (or members have been retained), VHP's customer support and member-focused communication should remain strong, positive, and responsive in order to steward retention in future years.

Conclusion

As you can see, crafting this campaign requires strategic thought that looks beyond identifying a target audience, writing some content, and buying ads. Partnerships and collaborations, accessible and transcreated messaging, emotive content, well-timed rollout, comprehensive success analysis, ongoing stewardship, and information that meets shoppers (and members) where they are—these are all key components of a successful open enrollment campaign.

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PRESENTATION REQUESTS

2.

**Demo the lifecycle of
#1 from a potential
customer's point of view.**

2. Demo the lifecycle of #1 from a potential customer's point of view.

We love this question. Everything we do is with the audience in mind, and “journey mapping,” or creating a visual representation of the process a person goes through to achieve their goal, is a highly effective way to ensure we are tuned in to the customer experience. Journey mapping is also very useful in identifying barriers or inefficiencies in a process.

As mentioned in Question #1, there are likely multiple different audiences in an open enrollment campaign, and multiple different ways to meet those audiences. Additionally, developing an effective campaign strategy requires in-depth discovery and ideation.

For the purpose of answering this question, we have selected just one audience, and have made some assumptions about that audience, the goals associated with that audience, and the capabilities of VHP's customer care team. The strategy shown here is somewhat basic, given the context of this presentation.

Assumptions:

- The audience is someone already covered through Covered California, who is interested in a different insurance provider/plan
- The audience is only shopping during open enrollment
- The shopper is deliberate and will gather information outside of the Covered California website
- The audience has a busy December schedule due to the holidays

As we do not have the specifics needed to strategize a campaign at this juncture, we will walk you through our thought process and some of the factors that must be considered in designing such a campaign.

[See the customer journey here >](#)

(tinyurl.com/m5d6378b)

preview image below

2. (CONT.)

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3.

How would your agency work with VHP to create a marketing strategy for Covered California open enrollment period in terms of project management?

Discuss the logic, timeline, review, feedback, and deployment – if applicable share what tools your agency utilizes. If you have (a) tool(s), will it/they be interactive with VHP.

3. How would your agency work with VHP to create a marketing strategy for Covered California open enrollment period in terms of project management?

Waltz Creative approaches every client relationship from a client-centric perspective. We do not believe in a one-size-fits-all approach. We understand that each client is unique. Whenever we engage with a new client, part of our onboarding process includes discussing the client's preferred ways of working, preferred methods of communication, things that have worked well in the past, and pain points they've experienced. This allows us to optimize our approach and work plan to ensure the most successful experience for the Waltz and client teams.

We believe our best work happens when we follow a process. That specific process may vary based on project type and client preferences but will typically include a discovery phase, a design phase, a final delivery phase and an analytics and insights phase. We understand the importance of client involvement and approval throughout the project lifecycle. Before moving from one phase to the next, we diligently seek and obtain approvals from the client to ensure alignment with their vision and objectives.

Phase 1: Discovery

Depending on the type of project, this phase could range from a couple of days to a couple of months. For a marketing strategy, we anticipate one to four weeks to work through the discovery phase, depending upon client availability and timely provision of information.

The Discovery Phase includes:

Project Initiation:

Client & Account Manager

Once the desired delivery date is established, we will propose a workback schedule, which specifies the target delivery date for each round, the number of rounds of edits included and when client feedback will be needed to keep the project on schedule. The proposed timeline will be reviewed with the VHP team to ensure it is realistic for all parties, that deliverables will be completed on time and that all parties are aligned and agree to the timeline.

During this stage, we will establish the anticipated list of project deliverables and provide transparent pricing for each deliverable. Before proceeding, both Waltz and VHP will agree to the project budget.

Project/Creative Brief:

Client & Account Manager

The Creative Brief is the cornerstone of every project. It serves as the foundation from which we build our creative concepts and as a point of alignment that both parties can return to if the project seems off track.

Waltz Account Managers collaborate directly with the client team to build a comprehensive creative brief that ensures project success.

When developing a Marketing Strategy, it is important that our team understand VHP's current marketing position, goals, and challenges in depth. To that end, there are some key questions to answer and points of information to provide for the creative team, including:

1. Marketing Objectives:
 - What are your primary marketing objectives for the next 6-12 months?
 - How do these align with your overall business goals?
 - Are there specific metrics you're aiming to improve (e.g., brand awareness, lead generation, enrolling new customers, customer retention, increased enrollment in a specific program vs. others)?
2. Current Marketing Performance:
 - How would you evaluate your current marketing efforts?
 - What are your most effective marketing channels right now?
 - What are your key performance indicators (KPIs), and how are you currently performing against them?
3. Target Market:
 - Have you conducted any recent market research or customer surveys?
 - How has your target market evolved over the past few years?
 - Are there new market segments you're looking to penetrate?
4. Competitive Landscape:
 - Who are your main competitors in terms of marketing presence?
 - How do you differentiate your marketing approach from theirs?
 - Are there any competitor strategies you admire or want to counter?
5. Brand Positioning:
 - How do you want your brand to be perceived in the market?
 - Is there a gap between your current brand perception and where you want to be?

3. (CONT.)

- Are you considering any changes to your brand positioning?
6. Customer Journey:
- Can you describe your typical customer's journey from awareness to purchase?
 - Where do you see the biggest drop-offs in this journey?
 - Which touchpoints are most critical in influencing purchase decisions?
7. Content Strategy:
- What types of content have resonated most with your audience?
 - Do you have a content calendar or regular content creation process?
 - How do you currently distribute and promote your content?
8. Digital Presence:
- How would you assess your current digital marketing efforts?
 - What's your strategy for social media marketing?
 - How effective is your website in converting visitors to leads or customers?
9. Data and Analytics:
- What marketing data do you currently collect and analyze?
 - Do you have a CRM system? How do you use it in your marketing efforts?
 - Are there any gaps in your data collection or analysis that you're aware of?
10. Marketing Technology:
- What marketing tools and platforms are you currently using?
 - Are you satisfied with your current martech stack?
 - Are there any new technologies you're considering implementing?
11. Budget Allocation:
- How do you currently allocate your marketing budget across different channels and activities?
 - Are there areas where you think you're over or under-investing?
12. Team Structure:
- How is your marketing team structured?
 - Are there any skill gaps in your current team?
 - How do you collaborate with other departments on marketing initiatives?
13. Past Campaigns:
- Can you share examples of your most and least successful marketing campaigns?
 - What lessons have you learned from these experiences?

3. (CONT.)

14. Seasonal Trends:

- How have seasonal trends, such as Open Enrollment periods, historically been addressed in your marketing strategy?
- How do you typically adjust your marketing efforts throughout the year?

15. Future Outlook:

- Are there any upcoming product launches or business changes that will impact marketing?
- What industry trends do you foresee affecting your marketing strategy in the next 1–3 years?

16. Challenges and Opportunities:

- What do you see as the biggest marketing challenges facing your business?
- Are there any untapped marketing opportunities you're keen to explore?

By discussing these questions with the VHP team, Waltz Creative can gain a comprehensive understanding of VHP's current marketing landscape, challenges, and aspirations. This information is crucial in developing a tailored, effective marketing strategy that aligns with your specific needs and objectives.

Project Kickoff:

Client, Account Manager & Design Team

We will schedule a project kickoff with the VHP team after the creative brief is completed. It is important that key stakeholders/decision-makers are included in this meeting to ensure alignment across both teams and avoid unnecessary rounds of edits that can compromise budget and timeline.

During the kickoff, we will review all of the information in the creative brief and work to achieve alignment on important project elements.

We will consider and discuss factors such as:

1. Budget constraints and ROI expectations
2. VHP's current brand positioning and market presence
3. Target audience demographics and behaviors
4. Competitors' marketing strategies
5. Short-term and long-term business goals
6. Available internal VHP resources to support the marketing efforts

3. (CONT.)

7. Current marketing assets and their effectiveness
8. Legal and regulatory constraints in your industry
9. Impact of seasonal trends or cycles, such as Open Enrollment periods, that affect marketing efforts
10. VHP's unique selling propositions (USPs)

The kickoff is also an opportunity to ensure all parties are aligned on items such as:

1. Clear definition of project scope and deliverables
2. Specific, measurable, achievable, relevant, and time-bound (SMART) objectives
3. Key performance indicators (KPIs) for measuring success
4. Roles and responsibilities of both the VHP team and the agency team
5. Brand guidelines and voice
6. Target audience personas
7. Preferred marketing channels and platforms
8. Content creation and approval processes
9. Data sharing and reporting expectations
10. Post-campaign analysis and optimization strategies

Addressing these questions, considering these factors, and aligning on these items creates a strong foundation for a successful collaboration. This preparation also helps ensure that the resulting marketing plan is tailored to VHP's needs, goals, and constraints while leveraging the Waltz team's expertise and resources effectively.

If anything uncovered during the kickoff impacts the budget, timeline and milestones or list of deliverables for the project, the Waltz team will update these items accordingly for final sign-off by the VHP team before we begin the design phase.

Phase 2: Design

Client, Account Manager & Design Team

Typically the Design Phase consists of initial concepts, followed by rounds of edits and refinement as needed. These stages take different forms depending on the type of project.

3. (CONT.)

For each project, we will discuss the nuances of the Design Phase during Discovery so that both teams know what to expect.

For a marketing strategy, our team would take all of the information reviewed during Discovery and build a recommended marketing strategy for VHP.

That strategy will include items such as:

- **Executive Summary:** A brief overview of the entire strategy.
- **Mission Statement:** The company's purpose and goals.
- **SWOT Analysis:**
 - **Strengths:** Internal positive attributes
 - **Weaknesses:** Internal negative attributes
 - **Opportunities:** External positive factors
 - **Threats:** External negative factors
- **Business Goals:** Specific, measurable objectives the strategy aims to achieve.
- **Target Market Analysis:**
 - Demographics
 - Psychographics
 - Behavior patterns
 - Buying motivations and concerns
- **Unique Selling Proposition (USP):** What sets the VHP apart from competitors.
- **Pricing Strategy, if applicable**
- **Distribution Channels:** How the product or service will reach customers.
- **Marketing Channels:**
 - Digital marketing (SEO, content marketing, social media, email, etc.)
 - Traditional marketing (TV, radio, print, etc.)
 - Direct marketing
 - Public relations
- **Marketing Budget:** Suggested allocation of resources across different marketing activities.

3. (CONT.)

- **Marketing Mix:**
 - Product
 - Price
 - Place
 - Promotion
 - People
 - Process
 - Physical Evidence
- **Customer Retention Strategy:** Plans to keep existing customers.
- **Conversion Strategy:** How leads will be converted into customers.
- **Brand Strategy:**
 - Brand voice
 - Brand identity
 - Brand messaging
- **Competitive Analysis and Positioning:** How the brand stands in relation to competitors.
- **Key Performance Indicators (KPIs):** Metrics to measure success.
- **Action Plan:** Specific tasks, timelines, and responsibilities.
- **Content Strategy:** Types of content to be created and how it will be distributed.
- **Technology Stack:** Tools and software to be used in executing the strategy.
- **Risk Assessment:** Potential risks and mitigation strategies.
- **Evaluation and Control Procedures:** How the strategy will be monitored and adjusted.
- **Timeline:** Schedule for implementation of different aspects of the strategy.

This comprehensive approach ensures that all aspects of marketing are considered and aligned with the overall business objectives. The strategy should be flexible enough to adapt to changing market conditions while providing a clear roadmap for marketing activities.

The strategy will be presented to and reviewed with the VHP team. VHP will then have adequate time to review and provide feedback. The Waltz team will work collaboratively with the VHP team to refine the strategy and attain approval from appropriate VHP stakeholders.

Phase 3: Final Delivery

Account Manager & Design Team

Upon approval of the marketing strategy, Waltz will deliver the final strategy via the deliverable method agreed to during Discovery. Possible formats include PDF, Google or Word Document, Google Slide Deck or PowerPoint Deck, or another client-preferred format.

The next step is to deploy the marketing strategy. Following approval of the marketing strategy, our team can build the communications calendar, recommend next steps/projects or begin work on any projects discussed during discovery such as marketing campaigns, collateral updates, website updates, etc.

Tools

Our team is committed to meeting our clients where they are. This philosophy includes important elements such as communication methods, interactive collaboration, project tracking and general ways of working. Some clients have established tools that work well for their team. In this case, we are happy to use your preferred tools and tech stack.

Our team typically uses collaborative tools such as:

- Adobe Creative Suite
- Google Drive
- Google Docs
- Google Sheets
- Google Slides
- Google Meet
- Figma
- FigJam
- Function Point
- Sprout Social

However, we have collaborated with many clients using their established suite of tools, including but not limited to:

3. (CONT.)

- Microsoft Teams
- Microsoft 360 Suite
- Microsoft Sharepoint
- Slack
- Trello
- Asana
- SmartSheet
- Miro
- Mural
- Hubspot
- Salesforce
- Hootsuite
- Emplify
- Adobe Express
- Canva

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4.

How would you create a special enrollment period campaign to position VHP in the Covered California market for enrollment?

4. How would you create a special enrollment period campaign to position VHP in the Covered California market for enrollment?

At Waltz, we prefer to phase the campaign into different steps to maximize time and effort while working on each phase accordingly. After careful consideration of VHP's needs, we have crafted a process specifically designed to ensure the success of this enrollment campaign.

Creating a successful Special Enrollment Period (SEP) campaign for VHP to position it effectively in the Covered California market involves a well-structured approach that considers various shopper types and their unique interactions with VHP. Below are the phases:

Phase 1: Research and Planning

- **Market Analysis:**
 - Understand the Covered California Market: Identify the demographics, psychographics, and behavior patterns of the target audience.
 - Competitor Analysis: Research competitors' strategies, strengths, weaknesses, and market positioning.
 - Regulatory Compliance: Ensure the campaign aligns with all regulations and guidelines set by Covered California and health insurance industry standards.
- **Audience Segmentation:**
 - Identify Target Segments: Segment the audience based on when they interact with VHP and their shopping style (e.g., price-focused, research-focused, emotionally driven).
 - Create Personas: Develop detailed personas for each target segment, including those looking to switch plans, those experiencing life changes, and those using different sources for information.
- **Objectives and Goals:**
 - Define Campaign Objectives: Increase brand awareness, drive enrollment, and highlight unique selling propositions (USPs) of VHP.
 - Set SMART Goals: Specific, Measurable, Achievable, Relevant, and Time-bound goals (e.g., achieve a 20% increase in SEP enrollments within three months).

4. (CONT.)

- **Messaging and Positioning:**

- **Develop Key Messages:** Tailor messages to highlight VHP's USPs such as affordability, comprehensive coverage, excellent customer service, and network of providers.
- **Value Proposition:** Communicate how VHP's plans meet the specific needs of different shopper types during SEP.

Phase 2: Creative Development

- **Content Creation:**

- **Visual and Written Content:** Develop engaging content including blog posts, infographics, videos, and social media posts tailored to different shopper types. We have a dedicated creative team that will be working on this campaign for VHP.
- **Testimonials and Case Studies:** Use real-life success stories and testimonials to build trust with emotionally driven shoppers. We have success creating similar types of assets for other clients that have similar goals to VHP.

- **Branding:**

- **Consistent Branding:** Ensure all campaign materials reflect VHP's brand identity and values. We will create a campaign branding guide and toolkit for each campaign we work on.
- **Campaign Theme:** Develop a compelling and cohesive campaign theme that resonates with the target audience.

- **Multichannel Strategy:**

- **Digital Channels:** Utilize SEO, PPC, email marketing, social media, and the VHP website.
- **Traditional Channels:** Consider using direct mail, print ads, radio, and community outreach.

Phase 3: Implementation

- **Digital Marketing:**

- **SEO and Content Marketing:** Optimize VHP's website and create valuable content to attract organic traffic, catering to those who research outside the Covered California website.
- **PPC Advertising:** Launch targeted ads on Google, Facebook, and other platforms to reach potential enrollees.

4. (CONT.)

- **Social Media Campaigns:** Engage with the audience through Facebook, Instagram, Twitter, and LinkedIn.
- **Email Marketing:**
 - **Segmentation and Personalization:** Send personalized emails based on audience segmentation, such as life changes or plan switching.
 - **Automated Drip Campaigns:** Set up automated sequences to nurture leads and remind them of SEP deadlines.
- **Community Outreach:**
 - **Partner with Local Organizations:** Collaborate with community centers, health clinics, and non-profits to raise awareness.
 - **Events and Webinars:** Host informational sessions and webinars to educate the public about SEP and VHP's offerings.

Phase 4: Monitoring and Optimization

- **Analytics and Tracking:**
 - **Set Up Tracking Mechanisms:** Track campaign performance using Google Analytics, social media insights, and CRM tools.
 - **Monitor KPIs:** Track key performance indicators such as website traffic, engagement rates, conversion rates, and enrollment numbers.
- **Continuous Improvement:**
 - **Analyze Data:** Regularly review performance data to identify what's working and what's not.
 - **Optimize Campaigns:** Adjust strategies, messaging, and tactics based on insights and feedback.
- **Reporting:**
 - **Regular Reports:** Provide detailed reports to stakeholders on campaign progress and results.
 - **Insights and Recommendations:** Offer actionable insights and recommendations for future campaigns.

Phase 5: Post-Campaign Analysis and Follow-Up

- **Post-Campaign Review:**
 - **Evaluate Success:** Compare results against the initial goals and objectives.
 - **Gather Feedback:** Collect feedback from internal teams, partners, and customers.
- **Learnings and Documentation:**
 - **Document Key Learnings:** Identify lessons learned and best practices for future campaigns.
 - **Plan for Future:** Use insights gained to inform and improve future marketing efforts.
- **Continuous Engagement:**
 - **Stay Engaged:** Maintain engagement with new enrollees through welcome communications, educational content, and ongoing support.
 - **Build Loyalty:** Develop loyalty programs and initiatives to retain members and encourage renewals

This phased approach ensures a comprehensive, strategic, and effective SEP campaign for VHP. It considers different shopper types and their unique interactions with VHP, thus positioning it strongly in the Covered California market and driving successful enrollments.

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5./6.

Program Launches

5./6. Program Launches

Questions #5 and #6 ask about creating program launches for specific Santa Clara County programs. Both questions indicate a goal of expanding enrollment in these programs and better meeting target guidelines. Each question asks to describe the marketing strategy on behalf of the County.

We will address the nuances of each program launch in a bit, but there are some overlapping elements we can discuss first.

Branding

The first element we would want to explore is how the programs are branded. Both of them are run by Santa Clara County. MedAssist also has a page on the VHP website, and PCAP information is hosted through the VHP Network website.

Prior to crafting the launch strategy, we would need to make some decisions about how the programs are marketed and where the program information should live. Some of the questions we would ask to make this determination could include:

- How do people learn about these programs?
- Is it important for consumers to understand that the programs are part of Santa Clara County? If so, why?
- Are these programs value-adds for VHP members? If so, do they need to be included on the VHP and/or VHP Network websites?
- Similarly, can people who are not VHP members access these programs? If so, does including them exclusively on the VHP and/or VHP Network website create confusion? Or does doing so introduce potential shoppers to VHP in a low-pressure manner?
- Is it beneficial to promote these programs alongside other VHP and/or County programs?

The answers to these questions will help us decide whether the programs should be clearly branded as VHP programs, County programs, both, or neither. Sometimes, having a deep brand hierarchy can create confusion for consumers and make programs seem more bureaucratic than they are. Other times, having a County seal on a program can increase trust in the program.

Partnerships

Another overlapping consideration when creating program launches for these two programs is where the target audience is already spending their time and getting their health information. As the two programs serve distinct audiences, we don't expect the answers to these questions will be the same for both programs. But campaigns related to public health usually benefit from having a component based in partnerships with other community-based organizations. Some questions might include:

- Where is the target audience currently receiving their healthcare services?
- What other benefits/programs might the target audience already be enrolled in? This could include Medi-Cal, VHP, or other health coverage, CalFresh, CalWorks, Healthcare Access Program, Family PACT, or other services.
- Which local nonprofit organizations might the target audiences be receiving services from?
- What institutions might the target audiences frequent? For example, MedAssist assists both children and adults, so public schools may be one institution worth looking at.

Building partnerships with the organizations and programs the target audiences are already engaged with is an excellent way to disseminate information. It can be a heavy lift in the beginning, but has long-term benefits. Additionally, VHP is particularly well positioned to explore this strategy because it is already a central part of the healthcare system in Santa Clara County, and likely already has many meaningful partnerships formed.

Basic Program Launch Strategies

There are some basic strategies that can be employed for both of these program launches. These include, but are not limited to:

- Creating unique, memorable messaging that gets to the heart of the need the program is addressing in its target audience(s).
- Choosing distribution channels that meet the audiences where they already are, including free and paid channels.
- Leveraging owned media to promote the program and its value.
- Partnering with other community organizations and County programs to help disseminate information.
- Ensuring messaging is transcreated as needed, and distributed in a culturally appropriate fashion.

- Issuing press releases and pursuing media opportunities.
- Interviewing current/past program participants and gathering testimonials of the program's value and benefits.

Again, the above ideas are not exhaustive, and there may be some ideas that are not appropriate for one of the program launches. But these are strategies we have seen work in the past for similar marketing initiatives, and we would certainly explore all of these possibilities after a thorough scoping and discovery process.

5. How would you create a program launch for Santa Clara County's Primary Care Access Program (PCAP)? PCAP – Site Name – County of Santa Clara (sccgov.org). Describe your marketing strategy campaigning on behalf of county. How would you expand enrollment and target guidelines?

Assumptions

Based on our brief audit of the existing materials for the Primary Care Access Program (PCAP), there are a few assumptions we are making in answering these questions:

- Due to the uninsured status of the target population, most of these folks currently access only emergency healthcare services and/or services through a community clinic.
- The target audience likely does not have a designated primary care provider.
- Due to the income requirements, the target audience is low income (by Bay Area standards), and potentially from a marginalized population.

Discovery

Similarly to what we reviewed in question #1, our discovery process would come before creating a launch campaign strategy. We would investigate the following, as previously detailed:

- Target audience and segments
 - We would want to understand any existing data on the number of uninsured people in Santa Clara County and the barriers they face in getting health insurance
- Program launch goals and how we will measure progress toward those goals
- What has worked and what hasn't in previously promoting this program
- Position in the marketplace compared to any similar programs
- Key messengers who are already interacting with the audiences, including existing and potential partnerships

We would also evaluate the items covered above regarding branding hierarchy (County vs. VHP vs. VHP Network vs. PCAP).

Strategy

We would then craft a strategy based on the findings from our discovery process. The strategy would consider the common launch strategies already discussed. It would be a priority to ensure any case managers working at the County or at clinics were aware of the program and how to enroll. We would create clear calls to action, an easily navigable landing page for the program, and paper information and application forms for potential program enrollees who do not have access to technology. We would facilitate transcreation of materials as needed. We would ensure any barriers the audience faces are addressed and mitigated. This includes ensuring program information is written at a readability level appropriate for the target audience.

Based on our assumption that the target audience is currently receiving medical care only through emergency services and/or community clinics, providing information through those venues is particularly important. Additionally, as community clinics are enrollment sites, ensuring all community clinics are well versed in program information and know how and when to offer program information to potential enrollees is critical. Finally, it is important to educate the target audience on the importance of preventive care, and promote PCAP as a way for the audience to access preventive services.

In terms of how we would represent the County, we would work hand-in-hand with County and program staff to ensure the program launch got the greatest reach possible. We would craft talking points about the program for County staff to use when talking to potential program participants, as well as talking points for speaking with other service providers.

We would, as appropriate, facilitate program promotion internally with the County prior to the public program launch, and ensure staff knew where to direct potential program participants who had interest or questions about the program.

6. How would you create a program launch for Santa Clara County's MedAssist program? MedAssist program | Valley Health Plan | VHP. Describe your marketing strategy campaigning on behalf of county. How would you expand enrollment and target guidelines?

Assumptions

Based on our brief audit of the existing materials for the MedAssist Program, there are a few assumptions we are making in answering these questions:

- The target audience regularly visits a pharmacy to pick up prescriptions for themselves or a dependent.
- The target audience is currently receiving healthcare services to manage their diabetes, asthma, and/or allergies.
- The target audience is low–middle income.
- The target audience is not necessarily insured through VHP.

Discovery

Similarly to what we reviewed in questions #1 and #5, our discovery process would come before creating a launch campaign strategy. We would investigate the following, as previously detailed:

- Target audience and segments
 - In particular, what are the eligibility criteria, and how does this “missing middle” (as named on the existing website) identify socioeconomically?
- Program launch goals and how we will measure progress toward those goals

- What has worked and what hasn't in previously promoting this program
- Position in the marketplace compared to any similar programs
- Key messengers who are already interacting with the audiences, including existing and potential partnerships

We would also evaluate the items covered above regarding branding hierarchy.

Strategy

We would then craft a strategy based on the findings from our discovery process, likely leveraging many of the common launch strategies previously discussed. Again, it would be a priority to ensure any case managers working at the County or at clinics were aware of the program and how to enroll, though this population may not be as well connected to case managers as the PCAP target audience.

We would create clear calls to action, an easily navigable landing page for the program. We would facilitate transcreation of materials as needed.

Based on our assumption that the target audience is currently receiving medical care and visiting pharmacies, providing information through those venues is ideal, if possible. Because of the wide variety of pharmacies and medical providers throughout Santa Clara County, saturating these venues may be challenging. Because this program also serves children, we would recommend working with local school districts to share program information with on-site school health staff, including nurses and health clerks.

In terms of how we would represent the County, we would work hand-in-hand with County and program staff to ensure the program launch reached as much of its target audience as possible. We would craft talking points about the program for County staff to use. We would, as appropriate, facilitate program promotion internally with the County prior to the public program launch, and ensure staff knew where to direct potential program participants who had interest or questions about the program.

Valley Health Plan

Marketing & Communication Services

PRESENTATION REQUESTS

7.

Share reporting and evaluation used in past client relationships. How was the marketing modified based on their feedback.

Include Before & After's.

7. Share reporting and evaluation used in past client relationships. How was the marketing modified based on their feedback. Include Before & After's.

Analytics and reporting are key parts of any campaign. With the tools available today, it is important to establish key reporting milestones on a per-project basis, as the best time to evaluate and consider adjustments will vary based on campaign goals, channels, and duration. We discuss and determine milestones, processes and tools for reporting and evaluation during our discovery process so that the client always knows what to expect.

EXAMPLE 1:

Syngenta Flowers Social Media

Social media is an area where we rely heavily on analytics to inform decisions. Waltz Creative managed social media for Syngenta Flowers from 2020–2023. In those four years, we helped build their social following from the ground up and developed it into a tool that supported and drove business objectives. After four years, the audiences, content strategy and calendar were well-established and the client felt comfortable enough to bring this responsibility back in-house and continue to build off of the foundation Waltz Creative built for them.

When we began working with Syngenta on social media, they had no presence whatsoever, so our goals were focused on building an audience. Building an audience was a key objective, but ensuring it was the right audience was even more important.

To this end, post content was geared toward the personas and *Reasons to Follow* established in the social media strategy. We ran regular paid campaigns that targeted demographics fitting audience personas and looked at performance metrics monthly. We also looked at performance data for organic posts on a monthly basis and adjusted post content accordingly. For example, we found that posts featuring faces, video content and technical/instructional content performed best for this B2B audience.

Early paid social efforts focused more on brand awareness and engagement, whereas once the audience grew, efforts shifted more toward driving web traffic and conversions.

BEFORE & AFTER:

March 2020

Facebook:
0 followers

Instagram:
0 followers

LinkedIn*:
2,512 followers

October 2023

Facebook:
1,000 followers

Instagram:
2,216 followers

LinkedIn*:
14,731 followers

* Shared account
with the European
division of
Syngenta Flowers

7. (CONT.)

EXAMPLE 2:

Housing Matters End-of-Year Campaign

Santa Cruz County nonprofit Housing Matters relies on end-of-year fundraising efforts to fuel critical initiatives and programs. In 2022, Housing Matters was seeing donor fatigue following a heavy, 18-month push for a Capital Campaign. They needed to increase their reach and expand their donor base to close the funding gap for a planned permanent supportive housing project and continue to serve those experiencing homelessness in the County.

While quite successful, the Capital Campaign had a pretty serious, formal tone and the Housing Matters team felt that their brand story had become a little flat. Knowing this campaign needed to shake things up a bit, recapture donors' attention and reengage them, we sought a campaign concept that commanded attention and generated clicks — thereby generating donations, awareness and community action. Playing off of Santa Cruz's history of activism and nodding to the peace and goodwill of the holiday season, we developed an irreverent theme, *Peace, Love, Give a Damn*, and got people talking.

2022 Campaign Goal

Increase donations by 10% from prior year

2022 Campaign Result

Increased donations by +32%, exceeding goal by +22%

The campaign's success contributed to a significant increase in FY2022 total donations, including increases in the total number of individual donors and donations as well as total donation dollars. This growth in donations had a measurable effect on HM's impact on the community, with the organization helping 30% more people find stable housing in 2023 than in 2022 and securing the remaining funding needed for the planned 121-unit, 5-story permanent supportive housing project.

Going into the 2023 EOY campaign, the plan was to create a new, unique campaign theme. However, during discovery conversations with the HM team, we learned that they were still getting positive

BEFORE & AFTER:

Before: Fatigued donor base after an 18-month Capital Campaign and plateau in donations received.

After: Existing donor base reinvigorated and new individual donors resulted in significant increase in fiscal year donations. Nearly a year later, campaign still receiving traction and attention.

LINK:

[Housing Matters Campaign Case Study >](https://tinyurl.com/2t9wzfyu)
(tinyurl.com/2t9wzfyu)

7. (CONT.)

feedback and engagement from the 2022 campaign nearly a year later. The *Peace, Love, Give a Damn* campaign was successful, relevant and fresh – so much so that the Housing Matters team felt it still had a lot of life left. So we switched gears and developed a concept that was a natural, loose extension of the original campaign concept, leveraging the 2022 campaign and taking it further. The refreshed theme, *Listen Louder*, subtly and indirectly told the community and donor audience “We still give a damn—show you do, too, by supporting Housing Matters.”

EXAMPLE 3:

Ecology Action, EVs for Everyone

In early 2020, as part of the Central Coast ZEV (zero-emission vehicles) Equity initiative, Ecology Action of Santa Cruz needed a campaign to engage, educate, and show residents in disadvantaged and low-income Central Coast communities that electric cars can meet their driving needs at an affordable price.

The original campaign goals included target numbers for local and state rebate applications, in-person test drives, Purchase Guidance program sign-ups and actual vehicle purchases or leases. While the goals were straightforward, the Pandemic hit just as campaign development was getting underway, so achieving effective results required a lot of pivoting.

With COVID restrictions, in-person events were not possible until the tail-end of the campaign. Additional challenges arose when state and local rebate opportunities were reduced and vehicle shortages meant dealers didn't have EVs available to sell or lease to interested buyers.

Working with the Ecology Action team, we quickly pivoted campaign strategy and focused on social media, webinars and arming program ambassadors with the tools they needed to conduct virtual outreach. We built landing pages, social graphics, digital ads and a car kit for ambassadors to visually promote the EVs for Everyone campaign

LINKS:

[EVs for Everyone
Case Study >](#)

(tinyurl.com/4kzkpyra)

[Bilingual
Marketing Blog,
featuring EVs
for Everyone
Campaign >](#)

(tinyurl.com/ycke2acs)

7. (CONT.)

from a distance when they drove through their communities or parked their vehicles in their streets and driveways.

We further increased the campaign's reach by transcreating all materials into Spanish to make sure the messaging was clear, easy to understand and resonated with the Spanish-speaking segment of the audience.

This pivot proved to be the right move, as metrics showed the Spanish URL had 135% more visits than the English. Overall, the campaign exceeded the target goals for Purchase Guidance program sign-ups and community awareness via impressions on digital and social. For the first eight months of the campaign, webinars took the place of in-person events and resulted in a 40% conversion rate for attendees applying for the Purchase Guidance program.

As in-person events resumed, digital campaign efforts switched gears to drive attendance for a Fall Ride-and-Drive event. The event was a success with 300+ visitors and 57 test drives that resulted in 60 EV purchases, despite reduced rebate availability and vehicle shortages.

A P R O P O S A L F O R

Valley Health Plan

Marketing & Communication Services

PRESENTATION REQUESTS

8.

Present on how you worked with past clients to comply with federal regulatory entities and marketing guidelines.

8. Present on how you worked with past clients to comply with federal regulatory entities and marketing guidelines.

Our Agency has extensive experience helping clients navigate complex regulatory landscapes across various sectors. We've developed a deep understanding of federal regulations and their impact on marketing strategies. Our expertise spans multiple industries, including healthcare, finance, food and beverage, and technology.

Key aspects of our experience include:

- **Industry-specific knowledge:** We've worked with medical device manufacturers, banks, food packaging companies, and healthcare providers, giving us insights into the unique challenges each sector faces.
- **Regulatory expertise:** Our team is well-versed in regulations enforced by agencies such as the FDA, USDA, FDIC, NCUA, EHL, and HIPAA compliance.
- **Practical implementation:** We've helped clients develop and implement compliance programs, create review processes for marketing materials, and train staff on regulatory requirements.
- **Problem-solving:** Our experience includes helping clients overcome specific compliance challenges, from navigating complex approval processes to adapting marketing strategies to meet regulatory constraints.
- **Balancing compliance and business goals:** We excel at finding creative solutions that ensure regulatory compliance while still achieving marketing objectives.
- **Ongoing support:** We provide continuous guidance to help clients stay ahead of regulatory changes and maintain compliance in evolving markets.

This diverse experience allows us to offer comprehensive, tailored compliance solutions that address the specific needs of each client while drawing on best practices across industries.

Website Compliance

Our agency is regularly updating its processes and best practices to ensure websites meet both Federal and State requirements.

Implementing compliance standards ensures that your website can be used by the widest possible audience, including people with varying disabilities such as visual, hearing, motor and cognitive disabilities. These disability categories demand specific adaptations in a website's design. Most often, these adaptations benefit all website users, not just those with disabilities, making them well worth the investment of time and resources. In many industries, ADA compliance is required.

ADA Compliance

The Americans with Disabilities Act (ADA) is a civil rights law that prohibits discrimination against people with disabilities in all areas of public life. It is universally known and accepted that businesses serving the public must ensure their buildings accommodate and are accessible to people with various disabilities. Websites are a lesser-known aspect of accessibility. As a website with inaccessible features can limit the ability of people with disabilities to access a public accommodation's goods, services, and privileges available through that website, the US Department of Justice takes the position that the ADA's requirements apply to all the goods, services, privileges, or activities offered by public accommodations, including those offered on the web.

Waltz Creative designs all websites according to Web Content Accessibility Guidelines (WCAG) AA (<https://www.w3.org/WAI/WCAG2AA-Conformance>) best practices, which provide clear access to important user information. If the Client is required to provide users with a more robust set of ADA-compliant features those can be integrated and may require additional fees. WCAG AA standards ensure your website is accessible to those with disabilities that affect their hearing, vision, motor skills, or other physical capabilities.

Consumer Data Protection

If you've ever clicked on an "OK with Cookies" prompt on a website, you've encountered this. Consumer data protection, also known as customer privacy, involves the handling and protection of sensitive personal information provided by customers in the course of everyday transactions. The internet has evolved into a medium of commerce, making consumer data protection a growing concern. The ways in which data is used and collected are more extensive now than ever before. With the growing need to collect and use consumer data, comes the need to protect the individual consumer's privacy and how their data is used. There are many laws and legislation in place to protect consumer data. GDPR, CCPA, and COPPA are three major laws/acts that apply to many of our clients:

The General Data Protection Regulation (GDPR) is a law established by the European Union in 2018 to regulate how websites, companies, and organizations are allowed to handle personal data. Personal data includes names, email addresses, location data, browser history, and much more. If your website has visitors from the EU and you've embedded third-party services like Google or Facebook, or process any kind of personal data, the

8. (CONT.)

GDPR says that you must first obtain prior consent from the user. The GDPR will levy harsh fines against those who violate its privacy and security standards, with penalties reaching into the tens of millions of Euros.

The California Consumer Privacy Act (CCPA) requires businesses to provide consumers with information about the data collected, processed, and sold in the past twelve months. The CCPA changes the way Californians can handle their own data, as it empowers them with new rights to request businesses disclose or delete the data they have already collected or to opt out completely of third-party data sales.

The Children's Online Privacy Protection Act (COPPA) is a federal law that protects children online. The law requires the operators of websites or online services directed at children under the age of 13 to obtain verifiable parental consent before collecting data. Exceptions may apply to activities that support internal operations, such as frequency capping, contextual advertising, site analysis, and network communications. While COPPA does not prohibit targeting children under 13 with advertising, it does establish parameters for how to collect and handle the personal information of children.

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PRESENTATION REQUESTS

9.

How has your agency used social media to interact with, enroll, and engage with persons from different socioeconomic and cultural backgrounds?

9. How has your agency used social media to interact with, enroll, and engage with persons from different socioeconomic and cultural backgrounds?

Effective social media marketing begins with a comprehensive strategy.

We work with clients to define goals and determine the strategy and reach of their social media presence by answering the following questions:

- What do we want to achieve through a social media campaign?
- Who are the target audiences?
- Which social media platforms can best reach audiences?
- How many social media platforms will be used and which ones?
- What will be the frequency of posting?
- What is the messaging and content strategy for each key audience segment?
- What are our content pillars?
- What are the ideal content ratios for each platform?
- Who do we want to follow us and why would they want to follow us?

Our Social Media strategy process also includes:

- Competitive landscape analysis
- Establishment of hashtag strategy
- Creation of social media mission statement
- Strategy for increasing followers

Through this strategy process, we uncover all of the audiences that need to be considered and discuss the nuance of each to determine the messaging and content strategy for each audience segment. This is the first step in crafting a social media strategy that drives effective interaction and engagement with diverse audiences from varying socio-economic and cultural backgrounds.

Waltz Creative has extensive experience creating marketing materials for multicultural and/or multilingual communities. With any project for a multicultural and/or multilingual audience, an important pillar of our process includes understanding cultural nuances, creating culturally relevant content, and ensuring quality through rigorous review. We engage native-speaking linguists for accurate translation and transcreation and continuously gather feedback for improvement, ensuring accuracy and cultural sensitivity in all final materials.

EXAMPLE 1:

Natividad Medical Center

Our strategic approach to social media and our experience with multicultural and/or multilingual audiences are critical to our successful partnership with Natividad. Their diverse audience requires a very intentional approach with all outreach efforts, including social media. Focusing on translation, transcreation, readability and clear visuals helps maximize Natividad's reach and allows the organization to better serve its patient population.

Located in Salinas, Natividad's social media audience is quite broad, including both internal and external audiences. In working with Natividad, we must craft content that effectively reaches seven diverse audience segments:

- Patients
- Community Members
- Health Dept.
- Employees
- Potential Employees/Contractors/Residents
- Donors
- Board of Trustees

Within these audiences, there is even more segmentation, particularly with the patient audience. As a county-owned, essential hospital, a significant portion of the patient population are non-English-speakers, many of whom do not speak Spanish either, but indigenous languages. In addition to Spanish and indigenous language speakers, Natividad's patient population includes speakers of many other languages. In total, the patient population speaks about 14 different languages. This means that clear communication of information can be more challenging and is incredibly important.

When developing social graphics for Natividad, we frequently use iconography to help communicate important messages visually as well as verbally. Content geared toward the patient population is often bilingual and the topics are carefully chosen to ensure they consider patients' perspectives, values and cultural influences and address areas of concern shared by many patients or topics on which they need more education in order to live their healthiest lives. This approach to content planning ensures that we are always optimizing content and making it as accessible as possible for all audience segments.

EXAMPLE 2:

Ecology Action of Santa Cruz

Ecology Action needed a campaign to accelerate awareness of clean transportation affordability and options to individuals in low-income/disadvantaged communities on the Central Coast with the intention of driving participation in grant, incentive, rebate, and purchase guidance assistance programs. The initial campaign strategy relied heavily on in-person interactions with program ambassadors via outreach at community events and even door-to-door outreach. However, the Pandemic forced a rethinking of the campaign strategy.

With face-to-face interactions eliminated for the majority of the campaign, it had to largely speak for itself. This meant that a transcreated approach to messaging was a must. Common phrases in English-speaking communities, such as driving a “clean car” or a “green car” did not resonate with Spanish-speaking audiences. We tested all of our initial campaign theme ideas on native Spanish speakers who were familiar with the target audience and region. This approach led us to a simple, catchy theme that underscored the key message that electric vehicles actually are affordable and accessible for everyone: EVs for Everyone / EVs para Todos.

Bright, eye-catching visuals coupled with the straightforward key messaging points helped reach the target audience during shelter-in-place periods and allowed the campaign to continue moving forward despite the circumstances. During this time, the Spanish version of the landing page received significantly more traffic than the English version. As the majority of the target audience was Spanish speaking, this confirmed that the social outreach was working. Ultimately, the campaign far exceeded goals for Purchase Guidance program enrollment and was only hampered by the halting of government rebates and vehicle shortages the nation experienced during the Pandemic.

In fact, the campaign reached audiences so effectively and had such a fresh look and feel that three years later, Ecology Action is still using the campaign identity to promote EV ownership in Central Coast Communities.

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PRESENTATION REQUESTS

10.

Share examples where your agency created project(s)/campaign(s) for influencers and/or referral sources vs end user consumers for Open Enrollment, Special Enrollment, and any other County/Government Healthcare programs, such as PCAP/MedAssist.

10. Share examples where your agency created project(s)/ campaign(s) for influencers and/or referral sources vs end user consumers for Open Enrollment, Special Enrollment, and any other County/Government Healthcare programs, such as PCAP/MedAssist.

Restrictions during the Pandemic had a significant impact on the EV campaign we worked on with Ecology Action of Santa Cruz. In-person events were not possible until the very end of the campaign. As the original campaign strategy relied heavily on in-person outreach, we had to quickly pivot. Along with social media and webinars, we armed program ambassadors with the tools they needed to conduct virtual outreach. We built landing pages, social graphics, digital ads and a car kit for ambassadors to visually promote the EVs for Everyone campaign from a distance when they drove through their communities or parked their vehicles in their streets and driveways.

Once in-person events returned on a limited basis in the second half of 2021, we designed materials to support outreach at farmers markets and other community events, including tents, table cloths, sandwich board signs, t-shirts and swag for program ambassadors to give away and more.

Going the extra step to transcreate campaign materials into Spanish to ensure the messaging was clear, easy to understand and resonated with the Spanish-speaking segment of the audience led to positive results. The Purchase Guidance program landing pages saw 135% more visits to the Spanish page than the English page. Program Ambassador outreach and visibility in the community also led to better than expected webinar attendance and a 40% conversion rate for webinar attendees applying for the Purchase Guidance program. Once in-person events resumed and Program Ambassadors could have face-to-face interactions with those they were trying to reach, a single Fall Ride-and-Drive event saw 300+ visitors, 57 test drives and 60 EV purchases, despite reduced rebate availability and vehicle shortages.

Waltz Creative has also worked with dozens of MedTech clients over the last two decades to develop materials to facilitate physicians, lab technicians, clinicians and other healthcare professionals recruiting patients to enroll in clinical trials and/or to consider a particular medical device as part of their treatment plan. The materials include brochures, posters, inclusion/exclusion cards and more. Physicians are the ultimate “influencers” in the MedTech space as they are the trusted professional patients turn to for information, guidance and advice when they experience significant health challenges.

10. (CONT.)

In addition to recruiting clinical trial participants, these MedTech companies must first get physicians and investors on board before they can advance to clinical trials. Waltz has developed hundreds, if not thousands, of marketing materials to enroll healthcare professionals as influencers and encourage investors to commit their resources to a company's next round of funding.

In working with local nonprofits that serve those in the community who are experiencing addiction, abuse and other life challenges we've developed materials for physicians, hospitals and emergency response personnel to share with those they encounter who could benefit from programs, such as residential and outpatient treatment programs.

A PROPOSAL FOR

Valley Health Plan

Marketing & Communication Services

PRESENTATION REQUESTS

11.

Present how your agency would leverage earned media towards VHP's marketing objectives.

II. Present how your agency would leverage earned media towards VHP's marketing objectives.

As you have already gathered, we start any project with a discovery process, ensuring we have all the necessary information to execute on the project with excellence. Some of the questions we have around leveraging earned media include:

- Does VHP have current systems in place to identify and track earned media (Google Alerts, for example)?
- What is VHP's current earned and owned media strategy? How is earned media acquired?
- What existing relationships does VHP have with reporters and media outlets in Santa Clara County and the other counties it serves?
- Has VHP's social media presence been used to leverage and encourage earned media? Who is the main social media audience? Does VHP have a formal social media strategy, and does that strategy include hashtag strategy?

Depending on the answers to these questions, our approach would include some or all of the following:

Monitoring and Tracking

- Set up comprehensive monitoring systems such as Google Alerts and social listening tools (e.g., Sprout Social) to track mentions of VHP across digital platforms.
- Designate a dedicated team member responsible for monitoring and reporting on earned media coverage regularly.
- Implement a proactive approach to identifying and responding to media mentions to leverage positive coverage and address any issues promptly.

Media Relationships

- Evaluate current relationships with local reporters, journalists, and media outlets in Santa Clara County and other service areas.
- Develop a strategy for nurturing and expanding these relationships through personalized outreach, providing timely and relevant information, and offering exclusive access to VHP initiatives and experts.
- Establish regular communication channels to maintain rapport and foster ongoing media engagement.

Current Presence Assessment

- Conduct a thorough audit of VHP's current social media presence, including platforms used, follower demographics, engagement metrics, and hashtag strategies.
- Identify strengths and areas for improvement in content strategy, frequency of posts, and community engagement practices.

Strategic Sharing and Amplification

- Develop a comprehensive social media strategy aligned with VHP's marketing objectives to amplify earned media coverage.
- Share positive media mentions across social channels to enhance brand credibility and visibility.
- Encourage stakeholders, including members, health program participants, and community partners, to share and engage with VHP's content to broaden reach and impact.

Content Repurposing

- Repurpose compelling earned media snippets in social media posts, newsletters, website updates, and other marketing materials.
- Use testimonials and endorsements from media coverage to build trust and credibility among current and potential stakeholders.

Creating Media Opportunities

- Develop a proactive media outreach strategy that includes drafting and distributing press releases, organizing media briefings, and hosting virtual or in-person press conferences for major announcements or events.
- Identify key milestones, initiatives, and achievements that are newsworthy and align with VHP's mission and strategic goals.

Analytical Insights and Optimization

- Utilize analytics tools to track the performance and impact of earned media efforts, including reach, engagement, sentiment analysis, and conversion rates.
- Gather actionable insights from media analytics to refine messaging, optimize content strategies, and enhance future media campaigns.
- Continuously monitor industry trends and competitor activities to stay ahead of emerging opportunities and challenges in the media landscape.

