

Valley Health Plan

Vendor Finalist Presentation

July 2, 2024



Agenda

- Introductions (5 min.)
- Presentation Responses (85 min.)
- Q&A (30 min.)





Introductions



HELPING YOU **SHINE**



Beth Welch
Managing Partner



Heidi Ash
Client Services Director

About Us



Our unique blend of marketing and creative services, specialized expertise and client-centric mindset allows us to deliver tailored, high-impact solutions that drive measurable business growth.



20 years in business,
founded in 2004

WOMEN OWNED™

Certified by the WBENC



Headquartered in
San Benito County



Dedicated to giving
back to local nonprofits



Serving clients across
many verticals



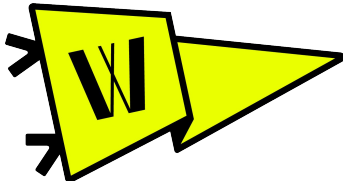
All working on-site and
remotely, within the U.S.

WHAT SETS US APART



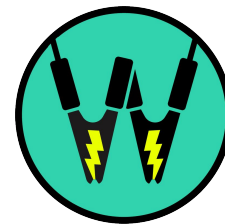
Healthcare & Medtech

With more than 15 years of experience, we have developed a deep understanding of the industry bridging the gap between patient needs and technology solutions.



Integrated Solutions

By offering both marketing strategy and creative/design services we are able to provide B2B, B2C, nonprofit and public agency clients with solutions to meet their business goals.



Collaborative Partners

We see ourselves as an extension of your team, working side-by-side with individuals and other business partners to find success.

BRINGING YOUR BRAND TO LIFE ACROSS PIXELS, PRINT & SPACE

Brand Identity & Strategy

Websites & Interactive

Advertising & Campaigns

Graphic Design & Marketing

Multimedia & Video

Content & Storytelling

Collaboration & Creative

- Adobe Creative Suite
- Google Workspace
- Microsoft Suite
- Figma
- FigJam
- Miro
- Slack

Project Management

- Function Point
- Asana
- Trello
- Microsoft Teams
- SharePoint
- SmartSheet

Marketing & Analytics

- Sprout Social
- Hubspot
- Salesforce
- Hootsuite
- Adobe Express
- Canva
- Campaign Monitor

Google

 Adobe

 Figma

 Function
Point

HubSpot

Canva

& many more...



Presentation Responses

#1

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

Open Enrollment Campaign Strategy for VHP/Covered California

Objectives:

- Position VHP in the Covered California market
- Drive enrollment, renewal, and retention
- Address diverse shopper needs and behaviors

Key Points:

- Different strategies are needed based on when and how shoppers interact with VHP.
- Shoppers include:
 - Current plan holders seeking better options
 - New enrollees due to life changes
 - Those using only the Covered California website to gather information
 - Those exposed to external marketing
 - Price-focused shoppers
 - Emotionally-driven decision makers

Campaign Development

1. Discovery & Background

Key Points:

- **Target Audience:**
 - Demographics (age, income, ethnicity, etc.)
 - Audience perception of healthcare
 - Familiarity with VHP vs. competitors
- **Goals:** Enrollment, renewals, and retention
- **Market Position:** Brand perception differences for current vs. new shoppers
- **Plan Differentiation:** Unique value VHP offers
- **Key Messengers:** Providers, community organizations, brokers

Methods:

- Market research, audience analysis, stakeholder interviews, audit of existing materials

Campaign Development (CONT.)

2. Strategy & Execution

Key Points:

- **Segmentation:** Tailored messages for different audiences
- **Accessibility:** Clear, understandable (translated) messaging for all
- **Emotional Connection:** Focus on trust, relief, ease, simplicity, and local understanding
- **Channels:** Email campaigns, customer service interactions, community partnerships
- **Timing:** Start before open enrollment, peak during the period, continuous support
- **Measurement:** Develop outcome metrics, collect data, analyze success and refine future campaigns

Conclusion & Key Takeaways:

Waltz Creative will apply a comprehensive campaign approach for VHP and will craft a unique campaign:

- Strategic thought beyond traditional methods
- Collaboration and partnerships
- Emotive and accessible content
- Well-timed and analyzed execution
- Ongoing support and communication

#2

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

Audience Profile & Assumptions

Audience Profile

- Currently covered through Covered California
- Interested in switching insurance providers/plans
- Shopping during open enrollment
- Gathers information from multiple sources
- Busy December schedule due to holidays

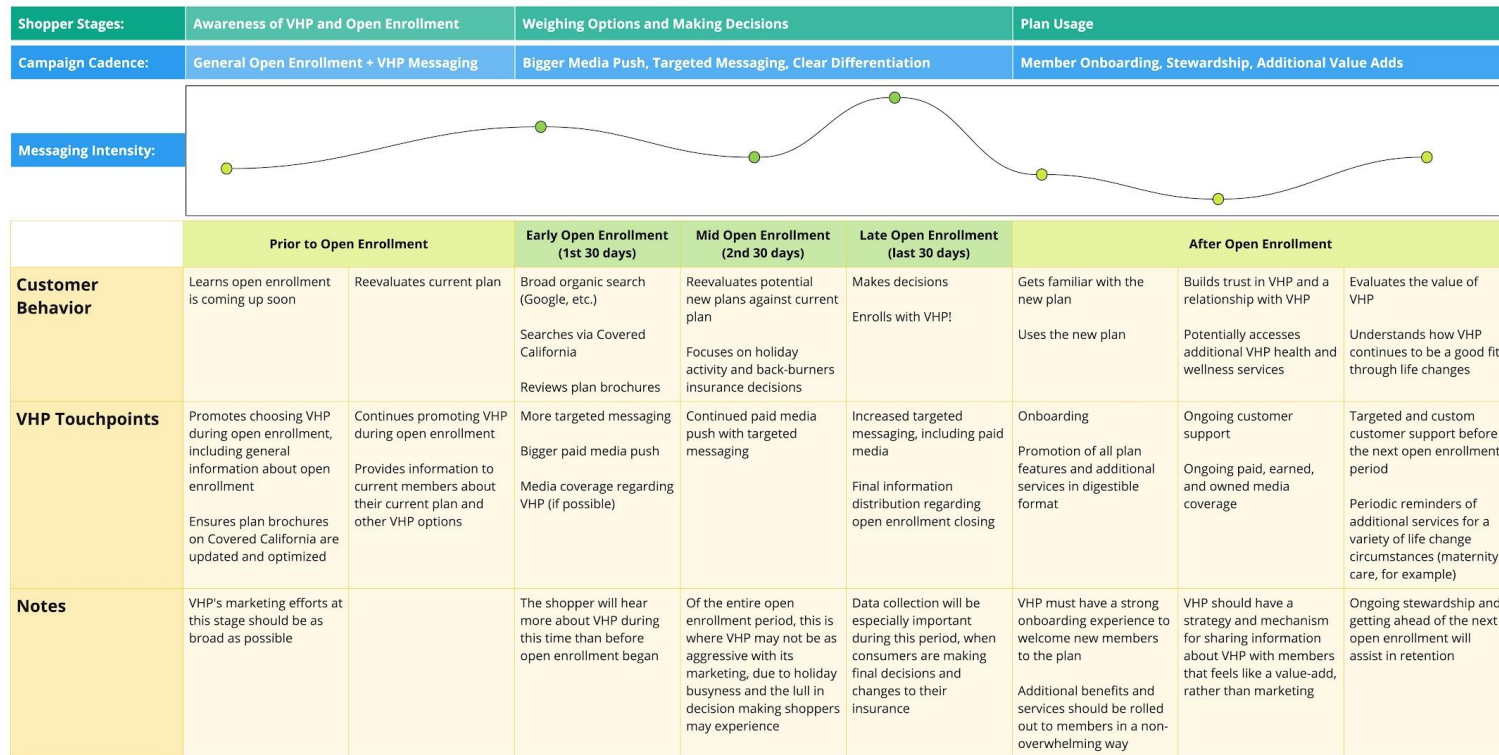
Assumptions

- Seeking better options
- Deliberate decision-maker
- Engages with external marketing beyond Covered California website

VHP Customer Journey: Open Enrollment Campaign

New VHP Customers

1. Includes those looking for a different insurance provider/plan than their current plan
2. Includes those shopping during open enrollment only



Customer Journey Map

Stages of the Journey

Awareness

- Initial exposure to VHP via marketing
- Key Messages: Trust, Simplicity, Local Understanding

Consideration

- Researching VHP on Covered California and other platforms
- Comparing plans and benefits
- Key Messages: Value, Emotional Connection, Ease of Use

Customer Journey Map (CONT.)

Stages of the Journey

Decision

- Seeking further info from VHP's customer service
- Key Interactions: Detailed Plan Info, Personalized Assistance

Action

- Enrolling in a VHP plan
- Key Interactions: Seamless Enrollment, Clear Instructions

Post-Enrollment

- Utilizing VHP services and support
- Key Interactions: Ongoing Communication, Wellness Programs

#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.

Project Management Phases

Process/Timeline

Discovery Phase

- Project initiation, establish schedule and budget
- Develop creative brief, kickoff meeting

Design Phase

- Develop and present initial concepts
- Refine strategy based on feedback

Final Delivery

- Deliver final strategy document

Discovery

Project Initiation

- Establish delivery date and workback schedule
- Define project deliverables and budget

Project/Creative Brief

- Detailed brief covering marketing objectives, current performance, target market, competitive landscape, brand positioning, customer journey, content strategy, digital presence, data and analytics and more

Project Kickoff

- Align on scope, deliverables, objectives, KPIs, roles, brand guidelines, audience personas, channels, content approval processes and data sharing

Project Management Phases

Design

- Develop initial concepts based on discovery insights
- Create a comprehensive marketing strategy covering SWOT analysis, business goals, target market analysis, USP, pricing strategy, distribution channels, marketing budget, marketing mix, retention and conversion strategies, brand strategy, competitive analysis, KPIs, action plan, content strategy, technology stack, risk assessment and timeline
- Present and refine the strategy with VHP team feedback

Review & Feedback

- Client involvement and approval at each phase
- Clear timelines for feedback to maintain project schedule
- Collaborative refinement of strategy documents

Deployment

- Deliver final strategy in agreed format (PDF, Google/Word Doc, Slide Deck, etc.)
- Build communications calendar and recommend next steps
- Implement projects such as marketing/social campaigns, collateral updates, and website updates

Conclusion

- Emphasis on a client-centric, adaptable approach
- Commitment to collaborative tools and interactive processes for optimal results

Review, Feedback & Deployment

Tools Used

Communication & Collaboration

- Google Workspace, Adobe Creative Suite, Microsoft Office Suite, Microsoft Teams, Slack, Figma, FigJam, Miro

Project Management

- Function Point, Asana, Trello, Microsoft Teams, SharePoint, SmartSheet

Marketing & Analytics

- Sprout Social, Hubspot, Salesforce, Hootsuite, Adobe Express, Canva

Interactive Tools

- Tailored to VHP's preferences for seamless collaboration and effective project tracking

#4

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

Research & Planning

Market Analysis

- Understand the Covered California market demographics, psychographics, and behavior patterns.
- Conduct competitor analysis to identify strengths, weaknesses, and market positioning.
- Ensure regulatory compliance with Covered California and health insurance industry standards.

Audience Segmentation

- Identify target segments based on interaction times and shopping styles (e.g., price-focused, research-focused, emotionally driven).
- Develop detailed personas for each segment, including those looking to switch plans, experiencing life changes, and using various information sources.

Objectives and Goals

- Define campaign objectives: Increase brand awareness, drive enrollment, highlight VHP's unique selling propositions (USPs).
- Set SMART goals: ex: achieve a 20% increase in SEP enrollments within three months.

Messaging and Positioning

- Develop key messages highlighting VHP's USPs such as affordability, comprehensive coverage, excellent customer service, and provider network.
- Communicate VHP's value proposition to meet the specific needs of different shopper types during SEP.

Creative Development & Implementation

Content Creation

- Develop engaging visual and written content, including blog posts, infographics, videos, and social media posts tailored to different shopper types.
- Use testimonials and case studies to build trust with emotionally driven shoppers.

Branding

- Ensure consistent branding across all campaign materials.
- Develop a compelling 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 direct mail, print ads, radio, and community outreach.

Digital Marketing

- Optimize VHP's website and create valuable content for organic traffic.
- Launch targeted PPC ads on Google, Facebook, and other platforms.
- Engage with the audience through social media campaigns.

Email Marketing

- Send personalized emails based on audience segmentation.
- Set up automated drip campaigns to nurture leads and remind them of SEP deadlines.

Community Outreach

- Partner with local organizations and collaborate with community centers, health clinics, and nonprofits.
- Host informational sessions and webinars about SEP and VHP's offerings.

Monitoring, Optimization & Post-Campaign Analysis

Analytics and Tracking

- Set up tracking mechanisms using Google Analytics, social media insights, and CRM tools.
- Monitor key performance indicators such as website traffic, engagement rates, conversion rates, and enrollment numbers.

Continuous Improvement

- Regularly review performance data to identify successful elements and areas for improvement.
- Adjust strategies, messaging, and tactics based on insights and feedback.

Reporting

- Provide detailed reports to stakeholders on campaign progress and results.
- Offer actionable insights and recommendations for future campaigns.

Post-Campaign Review

- Evaluate campaign success by comparing results against initial goals.
- Gather feedback from internal teams, partners, and customers.

Learnings and Documentation

- Document key learnings and best practices for future campaigns.
- Use insights to inform and improve future marketing efforts.

Monitoring, Optimization & Post-Campaign Analysis (CONT.)

Continuous Engagement

- Maintain engagement with new enrollees through welcome communications, educational content, and ongoing support.
- Develop loyalty programs and initiatives to retain members and encourage renewals.

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



#5 / #6

Program Launches

Overlapping Considerations for Program Launch's for PCAP and MedAssist

Branding Considerations

- **Audience Awareness:** Determine how the programs are marketed and where the program information should live
- **Clear Messaging:** Branded as VHP, Santa Clara County or both

Partnerships

- **Community Engagement:** Identifying where the target audience gets health info and healthcare services is pivotal. Collaboration with local nonprofits and community centers can effectively disseminate information.

Basic Program Launch Strategies

- **Compelling Messaging:** Develop messaging resonating with the audience's needs (e.g., uninsured status, lack of primary care).
- **Channel Selection:** Utilize suitable channels (paid and free) ensuring broad reach.
- **Owned Media Leverage:** Harness VHP's platforms for program endorsement.
- **Cultural Sensitivity:** Ensure communications are culturally appropriate, requiring transcreation.

By tailoring strategies to each program's unique audience and needs, these launches can effectively expand enrollment while meeting Santa Clara County's target guidelines.

#5

How would you create a program launch for Santa Clara County's Primary Care Access Program (PCAP)?

Describe your marketing strategy campaigning on behalf of county.
How would you expand enrollment and target guidelines?

Program Launch for Santa Clara County's Primary Care Access program (PCAP)

Audience Assumptions

- Currently access only emergency healthcare services and/or services through a community clinic
- Likely does not have a primary care provider
- Low income (by Bay Area standards) and potentially from a marginalized population

Discovery

- Target audience
- Define program launch goals
- Position in the marketplace
- Explore partnerships
- Evaluate branding hierarchy

Strategy

- Clear and accessible enrollment messaging and process
- Establish accessible enrollment sites
- Education around preventative care
- Staff education and training

#6

How would you create a program launch for Santa Clara County's MedAssist program?

Describe your marketing strategy campaigning on behalf of county.
How would you expand enrollment and target guidelines?

Program Launch for Santa Clara County's MedAssist program

Audience Assumptions

- Regularly visits a pharmacy to pick up prescriptions for themselves or a dependent
- Currently receiving healthcare services to manage their diabetes, asthma, and/or allergies
- Low-middle income
- Not necessarily insured through VHP.

Discovery

- Target audience
 - Eligibility criteria
 - How does this “missing middle” (as named on the existing website) identify socioeconomically?
- Define program launch goals
- What has/hasn't worked well with past promotion of program
- Position in marketplace
- Key messengers/partnerships
- Evaluate branding hierarchy

Strategy

- Clear and accessible enrollment messaging/process addressing audience habits (e.g., pharmacy visits)
- Targeted Outreach: pinpoint where the audience frequents for healthcare, including pharmacies, is critical.
- Collaboration with local school districts can facilitate outreach to families.
- County staff education and training

#7

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

Reporting and Evaluation Drive Optimization

Analytics and reporting are a key part of every campaign

- Establish key reporting milestones
- Milestones/timing may vary based on project type
- Determine processes and tools for reporting and evaluation during discovery

Example 1: Syngenta Flowers Social Media

Before (March 2020):

- Facebook: 0 followers
- Instagram: 0 followers
- LinkedIn*: 2,512 followers

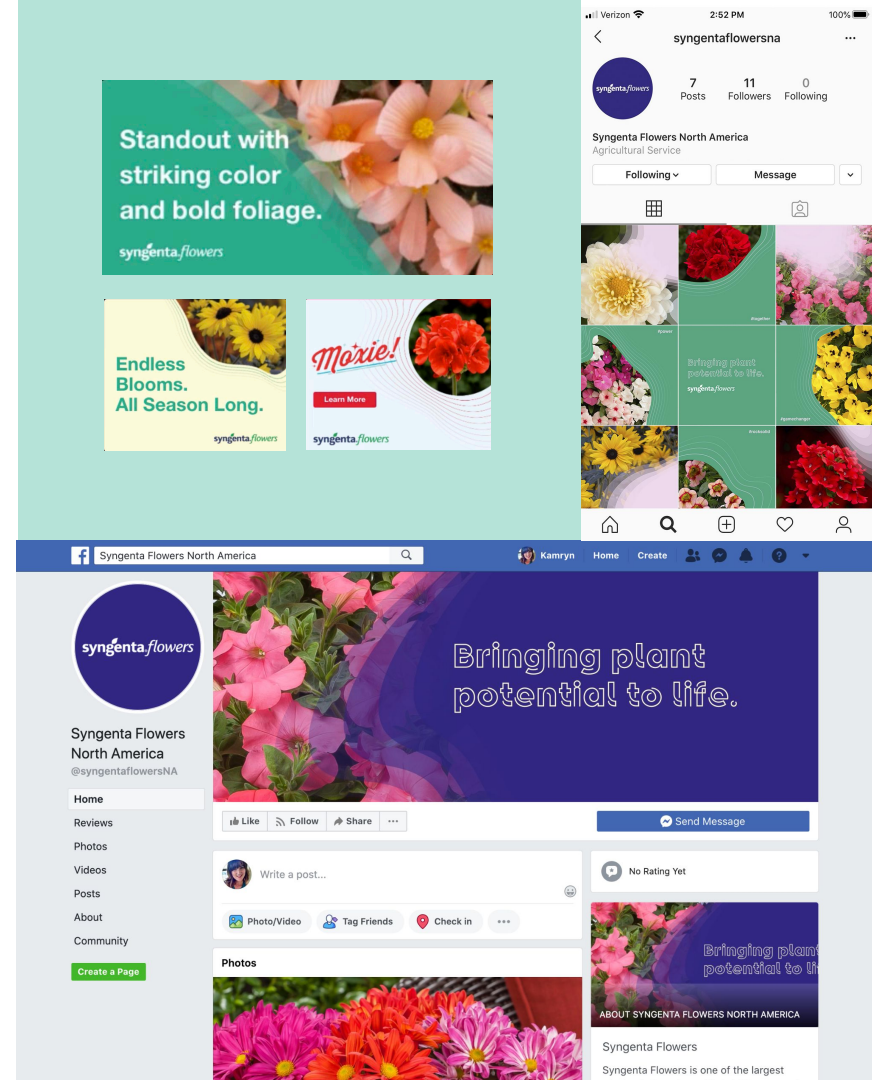
After (October 2023):

- Facebook: 1,000 followers
- Instagram: 2,216 followers
- LinkedIn*: 14,731 followers

Overview

Waltz Creative managed Syngenta Flowers' social media from 2020 to 2023, building their presence and engagement significantly. Initially focusing on brand awareness and audience growth, the strategy evolved to drive web traffic and conversions as the audience matured.

*shared account with the European division of Syngenta Flowers



Example 2: Housing Matters End-of-year Campaign

2022 Campaign Results

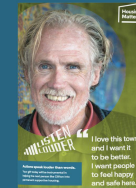
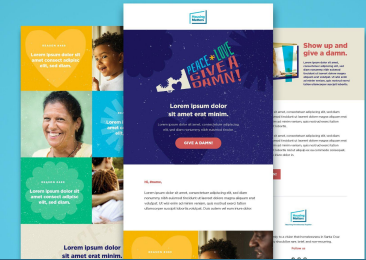
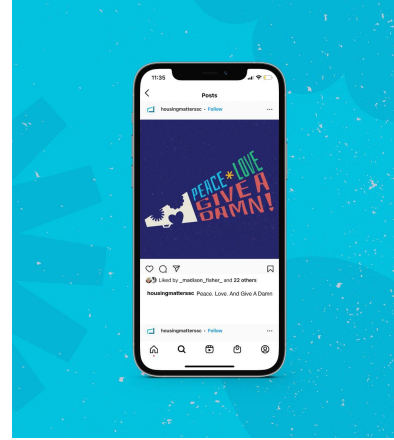
- **Goals:** Reinvigorate donor base after Capital Campaign; increase donations by 10% from prior year
- **Result:** Increased donations by +32%, exceeding goal by +22%

Impact and Follow-up (2023)

The 2022 campaign's success led to increased donations, individual donors, and total dollars, helping Housing Matters assist 30% more people in 2023 and fund permanent supportive housing project. For the 2023 EOY campaign, positive feedback prompted extending the original concept, evolving into the refreshed theme, Listen Louder: "We still give a damn—show you do, too, by supporting Housing Matters."

Before & After Insights

- **Before:** Fatigued donor base; lagging donations
- **After:** Re-energized and expanded donor base giving more than ever before



[illegible]

- Spanish Website:
135%
more visits

5% visits

¡CONÉCTATE A UN COCHE ELÉCTRICO!

Para tu carrera, tu familia, y nuestra comunidad.

No tienes que esperar, hasta el futuro para hacerte dueño de un Coche Eléctrico. ¡Pídelo hasta \$14,000 para actualizar tu vehículo! \$8 *Programa de incentivo

Orientación para la Compra de Vehículos Eléctricos de la Costa Central* ayudo a residentes de bajo o medio ingresos durante

© 2016 GreenSource

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#8

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

Regulatory Compliance Expertise

Our Agency excels in navigating complex regulatory landscapes, with expertise in federal regulations impacting marketing across healthcare, finance, food and beverage, and technology sectors.

Industry-specific Knowledge

- Extensive experience in healthcare sector regulatory compliance.
- Specialization in navigating FDA, HIPAA, and other relevant regulations.
- Understanding of reimbursement strategies.

Practical Implementation

- Developing and implementing tailored compliance programs.
- Creating review processes for marketing materials to ensure regulatory adherence.

Problem-Solving Approach

- Overcoming complex compliance challenges in healthcare marketing.
- Balancing compliance with strategic business goals effectively.

Past Experience with Regulatory and Compliance Considerations



HIPAA
COMPLIANT



ADA Compliance and Accessibility

Importance of ADA Compliance

- Ensures equal access to healthcare information for all users.
- Demonstrates commitment to inclusivity and patient-centered care.

WCAG AA Standards

- Websites designed according to [Web Content Accessibility Guidelines \(WCAG\) AA](#) best practices.
- Features include alternative text, keyboard navigation, and enhanced contrast ratios.

Benefits

- Improves user experience and engagement.
- Aligns with regulatory expectations and enhances usability.



Regulatory Compliance

- Ensured compliance with GDPR, CCPA, and COPPA.
- Protected sensitive patient data through encryption and secure storage solutions.

Implementation Strategies

- Educated staff on data privacy practices.
- Conducted regular audits to maintain compliance.

Benefits

- Built patient trust and loyalty through ethical data handling.
- Mitigated risks of data breaches and regulatory penalties.



#9

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

Comprehensive Social Media Strategy

Defining Goals and Strategy

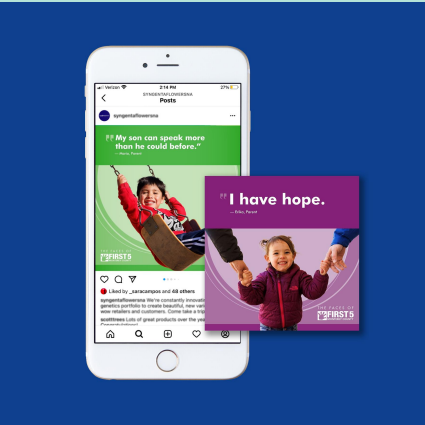
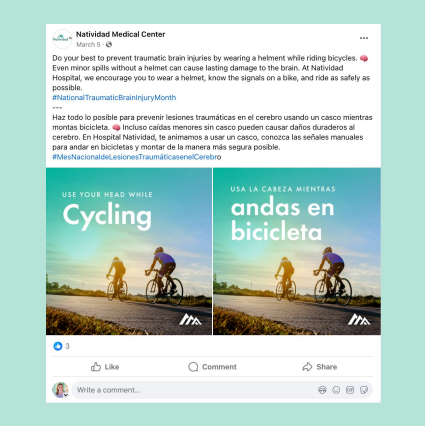
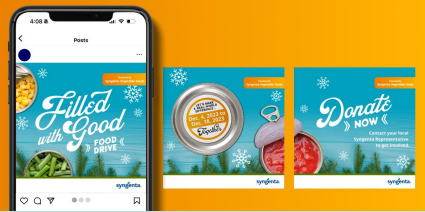
- Identify specific campaign objectives.
- Determine target audiences and their demographics.
- Choose the most effective social media platforms for reaching these audiences.

Strategic Planning

- Decide on the number and type of social media platforms.
- Establish posting frequency and content strategy.
- Develop messaging tailored to each key audience segment.
- Define content pillars and ideal content ratios.

Engagement and Follower Growth

- Perform competitive landscape analysis.
- Create a hashtag strategy to increase reach.
- Develop a social media mission statement.
- Implement strategies to grow follower base and increase engagement.



Engaging Multicultural and Multilingual Audiences

Understanding Cultural Nuances

- Develop culturally relevant content through rigorous review processes.
- Engage native-speaking linguists for accurate translation and transcreation.
- Continuously gather feedback to ensure cultural sensitivity and accuracy.

Case Study

Natividad Medical Center

- Tailored social media content to a diverse audience, including patients, community members, employees, and more.
- Used bilingual content and clear visuals to maximize reach.
- Crafted messages considering patients' perspectives, values, and cultural influences.
- Employed iconography to communicate important messages visually.



Engaging Multicultural and Multilingual Audiences

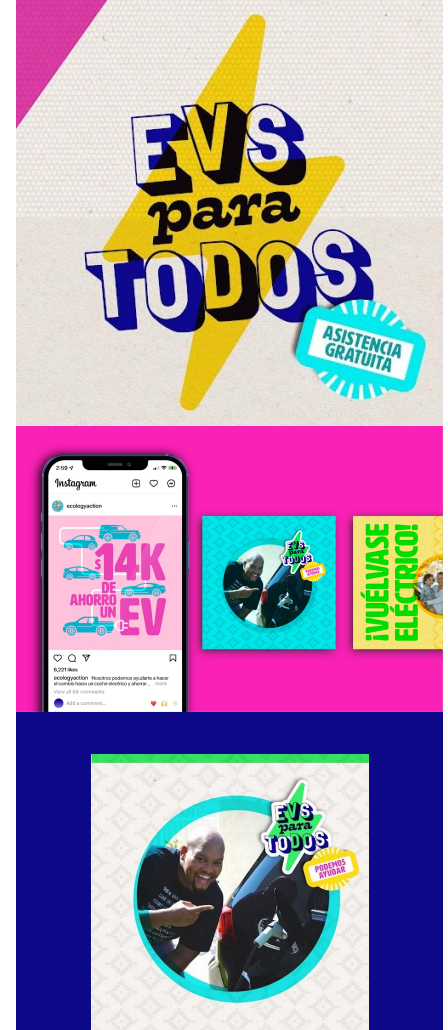
Adapting Strategies During Challenges

- Shifted from in-person interactions to digital campaigns during the pandemic.
- Ensured messaging resonated with diverse linguistic and cultural backgrounds.
- Developed visually appealing and straightforward campaigns to maintain engagement.

Case Study

Ecology Action of Santa Cruz

- Created the "EVs for Everyone / EVs para Todos" campaign to promote electric vehicle affordability.
- Utilized bright visuals and key messaging to reach Spanish-speaking audiences.
- Achieved significant traffic and engagement on the Spanish version of the campaign.
- Continued success with the campaign identity, demonstrating its effectiveness in reaching target audiences.



#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.

Influencer and Referral Campaigns

Strategies and Tools

- Virtual Outreach Adaptation:
 - Pivoted from in-person events to virtual outreach due to the pandemic.
 - Utilized social media, webinars, and virtual tools for program ambassadors.
 - Created landing pages, social graphics, digital ads, and car kits for community outreach.
 - Transcreated campaign materials into Spanish for wider reach.
- Supporting In-Person Events:
 - Designed materials for community events post-pandemic.
 - Created tents, table cloths, sandwich board signs, t-shirts, and swag.
 - Ensured materials were transcreated into Spanish for clarity and resonance.

Results

- Spanish Page Engagement:
 - 135% more visits to Spanish Purchase Guidance program page
 - High community visibility and engagement via program ambassadors.
 - 40% conversion rate from webinar attendees to program applicants.
 - Successful Ride-and-Drive event despite challenges.



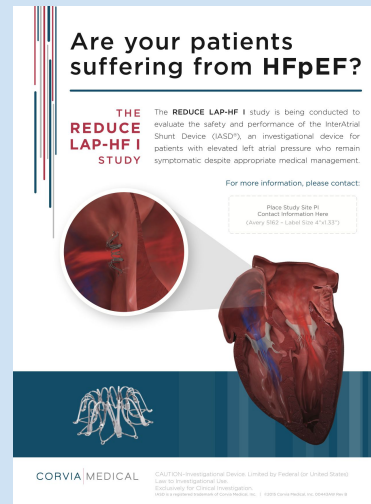
MedTech and Nonprofit Influencer Materials

MedTech Sector

- **Physician and Clinician Materials:**
 - Developed brochures, posters, and cards for recruiting clinical trial patients.
 - Created materials to help healthcare professionals recommend medical devices.
 - Positioned physicians as key influencers in patient treatment decisions.
- **Investor Engagement:**
 - Designed marketing materials to attract and secure investor funding.
 - Supported MedTech companies in advancing to clinical trials through influencer engagement.

Nonprofit Collaborations

- **Support for Vulnerable Populations:**
 - Developed materials for addiction, abuse, and life challenge programs.
 - Distributed through physicians, hospitals, and emergency responders.
 - Aimed at encouraging program enrollment and support.



#11

Present how your agency would leverage earned media towards VHPs marketing objectives.

Leveraging Earned Media

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.

Social Media Strategy

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.

Proactive Engagement

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.

Waltz is your dedicated PARTNER

for all VHP's creative needs, uniquely
equipped to transform specific
challenges into opportunities.

Q&A
