

Group Onboarding & Rollout Game Plan

AllyHealth Client Services

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Prepared for <<Company Name>>

ALLYHEALTH



The AllyHealth New Group Onboarding and Rollout Game Plan

At AllyHealth, we value our relationships with our clients above all else. As such, we put a huge emphasis on driving employee participation, awareness and utilization, which helps drive a high return on investment for our clients and partners. In this guide book, we will lay out our game plan for working together with you to maximize utilization and ROI with our platform.

Our goal is simple: We want you to be successful so that you will stay a customer for years to come.

With this clear alignment of goals between you and us, it should be easy for us to work together and follow our group rollout plan to ensure a win, win, win for us, you, and your employees! In this rollout plan guide, we will walk you through the following sections:

- **The Objective:** Our objective is simple (as stated above), but let us expand on it for you.
- **Communications Plan:** Communication is the key to success with our platform.
- **Timeline:** We have analyzed the best company action plans to determine ideal timing.
- **Incentives and Promotions:** The more creative we can get, the more your employees will participate.

The Objective

Our objective is simple: We want you to be successful so that you will stay a customer for years to come.

We know that might sound selfish, but our company mission is to help people (and businesses) get better care, fight rising health costs, and be healthy and well. And the only way we can achieve that is by working closely with you to help your employees.

Success in this program is very simply defined by employee awareness, education, and therefore participation, and utilization (which leads to a strong return on investment for your company).

We've worked with many clients and analyzed the telemedicine strategy in many more, so we have the game plan to take us to the twenty yard line. You know your employees and your company culture, which gives us the extra twenty yards to ensure successfully reaching our goals of employee participation together!

Ultimately, the awareness that we drive together will lead not only to an ROI for your company, but also to happier and healthier employees. That's why we call it a win, win, win!

Communication Plan

With an end goal of employee participation, the key to success is “Communication, communication, communication!”

Communication drives employee enrollments and activations, which drives utilization of the program, which drives overall lower costs for your company. It’s that simple.

Through our experience, we’ve developed template emails, letters, marketing flyers, posters, and more. The more we share with your employees, the more likely they will be to use the program. And with a 96% customer satisfaction rating, once an employee used the program once, they are likely to use it again and again!

Here is a high-level outline of our Communications Plan:

1. **Preparation:** Every successful campaign must start with a plan. That’s why our first step is Preparation. In this step we do the following
 - a. Implementation Kickoff Call --- We have a discovery call to discuss strategy (some companies want to do more than others). During this call we will determine our plan of attack and review our promotion calendar.
 - b. Assign person (or people) who will be the liaison to your employees --- This person should be in management or a position of authority. The goal is to educate this person fully about the program so they can endorse and promote it within your company.
 - c. Gather Employee Information --- We also gather all of the necessary information on your employees in this stage so that we can work with you to drive participation. The main information we need is email addresses and phone numbers. There are several options in terms of how much information you can provide to us, as follows:
 - i. BOTH email addresses and phone numbers (this is the best option because we can drive participation through multiple channels)
 - ii. Only email addresses or only phone numbers (This is not as ideal as option “a” above, but it still allows us to help drive participation. Emails are better than phone numbers if you are going to provide only one or the other.)
 - iii. Neither phone numbers nor email addresses (in this scenario, we will do what we can to coach you, but we cannot participate in driving employee participation)

2. **Rollout:** Now that we have reviewed our plan together and gathered all of the relevant employee information, it’s time for us to execute on our plan. This stage of the process involves driving awareness and education for your employees through multiple channels to ensure maximum participation and ROI. Here are some of the strategies typically employed:
 - a. Liaison Promotion: It’s very important that the introduction and promotion of the program comes from you. We are an unknown third party, but you are their trusted employer, which means they will listen to you more than they will listen to us. We will work with you to drive

- b) Initial Employee Rollout Memo: We will provide you with a draft memo for you to send to your employees announcing the program, how it works, and what to expect next.
 - c) Welcome Brochures: We suggest that you hand these out to your employees, but we can also mail them directly to the employees' homes if you prefer.
 - d) Multiple Education/Awareness Channels: We can provide you with break room posters, pay check stuffers, and other educational materials. We also recommend you have a meeting to discuss the program with your employees.
3. **Incentives:** These are not required, but they are very highly recommended. Incentives to encourage employee activations are among the best ways to drive participation. We think these are so important that we've dedicated an entire section later in this guide to them. Read on for more details!
4. **On-Site Events:** Many companies have regular company-wide events already planned. Others like to schedule one specifically to roll out our program. Either way, this is a great way to drive awareness and participation and to boost employee morale.
- a) We do a live Webinar on the second Thursday of each month
 - b) We can schedule a Webinar with your team (Lunch & Learn) at your convenience
 - c) We can help you to prepare for an event that you want to host on your own
 - d) Note: Make sure you include information on AllyHealth in your new employee orientation and onboarding process
5. **Continuous Promotion:**
- a) From Us:
 - i. Monthly "Health Education Emails"
 - ii. Periodic Birthday Emails
 - iii. Periodic Product Launches
 - b) From You:
 - i. Bi-Annual "Internal Activation Emails"
 - ii. Incentives

Timeline

We've worked with many clients, and analyzed the implementation of many more, to come up with what we believe is the best calendar and timeline in the industry to maximize activations, participation, and utilization (and ROI)!

Take advantage of our experience and follow this road map to success!

30 Days Prior to Launch: This is where the awareness campaign begins

- Housekeeping Items:
 - Discovery call with your Account Manager
 - Review Plan, Checklist, and Calendar and make adjustments as needed
 - Collect and share email addresses and phone numbers of each of your employees
- Company Liaison to distribute Employee Memo (by email or printouts placed on employees' desks)
- Schedule a confirmation email to go out (usually 7 days prior to launch)
- Announce the program at company events (team meetings, newsletters, intranet, etc.)

Launch Date: The start of our promotional campaign

- All accounts are now enrolled and ready to activate
- AllyHealth will send a welcome email to all employees with activation instructions
- Company to distribute all Welcome Kits to employees (placed on desks or dropped in mailboxes)
- Internal announcement that program is live

30 Days Post-Launch: Promotional campaign continues. Incentive campaign launched (if applicable).

- Email drip campaign begins (3 emails, sent on days 5, 15, and 30-40)
- Require your team to attend (or watch) our New Member Orientation
- Host an enrollment event to help promote the program, answer questions, etc.
- Hang posters in break rooms, restrooms, and other common areas
- Insert envelope stuffers into paychecks

60 Days Post-Launch: Monitor progress and continue promotion (as necessary).

- Solicit feedback from your employees on the AllyHealth platform
 - How do they like the service?
 - Are they having any problems or roadblocks?
 - Do they have any questions?
- Continue with promotional campaign

90 Days Post-Launch: Reporting and evaluation of progress (and course-correction, if needed)

- Additional activation email sent to the group
- AllyHealth will begin providing quarterly utilization reports for review and discussion
Based on these reports, we can make decisions regarding the need for additional promotion and/or education to help further drive utilization

Ongoing: Drip campaign, reporting, monitoring, and Account Management

- AllyHealth will send out monthly “Health Education Emails” to activated members
- AllyHealth will send periodic emails regarding product launches, member birthdays, etc.
- Company should send a bi-annual “Internal Activation Email” in months 6 and 12
- AllyHealth will send quarterly utilization reports to the Group Administrator
- AllyHealth will stay in touch with the Group Administrator to monitor employee satisfaction, utilization, and to answer any questions the group has

(INSERT GRAPHIC SHOWING TIMELINE)

Incentives and Promotions

With a common goal of driving participation and utilization of the service, we've found that our most successful companies (i.e. highest ROI!) are the ones who get creative in how they promote AllyHealth and incentivize employees to use it.

We've got a few tricks already up our sleeves from our experience that we'll share with you here, but we always encourage our customers to think outside of the box and brainstorm on some ideas that might work really well for your particular company, given your unique culture and team makeup.

The key thing to keep in mind is that the goal in an Incentive (or Promotion) Campaign is to get employees to Activate their accounts. Activation is the first step needed before Utilization, so driving Activations is always the primary goal.

Here are a few "off the shelf" ideas to get your creative juices flowing. After you've let these sink in we're happy to get on the phone and brainstorm with you about some other ideas you might have for the "perfect" Promotion Campaign.

1. **Lunch and Learn:** We can do this via Webinar or in person (depending on your location). The idea is simple. We provide lunch and you bring your people. We can spend the entire lunch hour making sure everyone knows all about AllyHealth and the personal benefits to using the service. You'll be surprised how many people you can get to attend when there's a free meal involved!
2. **Health Fair:** We can help organize and/or co-sponsor an on-site health fair during which we can help educate employees about AllyHealth and the benefits of using the service. If this is something that your company already does each year, then we can set up a booth and have one on one sessions with each of your employees in a fun and disarming atmosphere.
3. **Giveaways:** This is one of the best ways to drive participation. Offering a chance at valuable prize to one employee (or a few) is a great motivator! We can give entries to employees for attending an orientation meeting/webinar, activating their account, filling out their medical history, and more. The more they engage, the more chances they can have to win (and the greater their likelihood of using the service!). Here are a few prize ideas:
 - a) \$10 gift card --- Coffee shop, electronics store, iTunes, Amazon, etc.
 - b) \$100 spa gift card --- To a local spa
 - c) \$100 restaurant gift card --- To a local restaurant or on Restaurant.com
 - d) Game Tickets (2) --- Tickets to the local sports team
 - e) iPad Giveaway --- Or another electronic device, like a flat screen TV
 - f) Half Day Friday --- Employee can be dismissed after lunch on a Friday
 - g) Sleep in for a Day --- Let the employee come in late on a day of their choice
 - h) One Extra Day of PTO --- Full day off at time of the employee's choosing
 - i) Reserved Parking Space --- Prime parking space reserved for a year
 - j) One Year of Free Health Benefits --- Pay the insurance premium for the employee for 12 month

4. **Incentives:** Instead of a larger prize Giveaway, as described above, we can reward everyone for certain actions with smaller gifts (like \$5 or \$10 gift cards or prizes) for actions that we are trying to promote, like attending an orientation, activating their account, etc.
5. **Promotional Items:** We can brand any promotional item to help drive awareness and participation in AllyHealth, such as stress balls, key chains, pens, etc.

Summary

Thank you for deciding to partner with us to help drive healthier and happier employees (and lower health costs)!

We believe that our relationship together will be a long journey and not a sprint. This is why we try to have a clear road map in place from the start so that we can be on the same page in how we move forward together.

We promise to do everything we can to make this partnership a success and we promise to listen to all of your feedback and do whatever we can to make your experience with us as positive as possible!

In Good Health,

The AllyHealth Team