2015 Brand Strategy and Tactical Marketing Plan

January 2015

Introduction

- Information presented provides summary level insight into the company's brand management and tactical marketing strategy along with the tactical activities planned. The document includes an industry overview to help lend perspective into the environment in which we operate, and crafted in such a manner to allow sufficient flexibility such that emerging industry trends, market issues, or other developments may be addressed in a timely and appropriate manner.

- When executed, this plan will positively contribute towards obtainment of the corporate objectives simultaneously with brand strategy and marketing objectives.

Table of Contents

Corporate Analysis

Mission Statement

To be the best-in-class company that does the right thing for all involved in the workers' compensation and/or auto no-fault lifecycle.

Vision

To be the best-in-class company that **does what's right for all involved** in the workers' compensation and auto no-fault claim lifecycle.

Values

The actions of our company are guided by three core values; integrity, respect, and humility.

- **Integrity** that is present in all situations that guides our deeds and actions to do what is right, even when it is difficult, unpopular or otherwise challenging
- **Respect** for people and their ideas , thoughts and opinions – even when they are different from one's own
- **Humility** that embraces "we" above "I" and does not get caught up in titles, position, or power
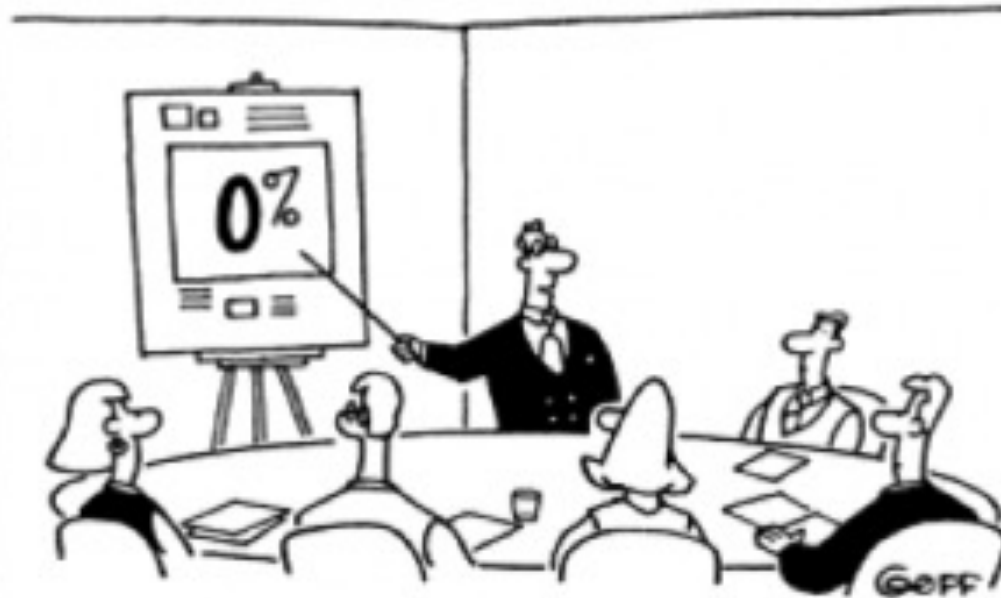
Corporate Objectives

- Increase Customer Retention and Satisfaction

- Grow our Business

- Become More Efficient

- Innovate our Products and Services

SWOT ANALYSIS
Primary factors

S Strengths

- Breadth of product portfolio
- Analytic insight
- Clinical expertise
- Leadership
- Financial stability
- Ability to think outside the box
- Perceived as a "safe choice"
- Strong moral compass
- Committed to doing what is right

W Weaknesses

- Speed to market
- Resource availability
- Moving forward somewhat encumbered by migration and integration activities
- Value vs. price argument not always appreciated by the buyer

O Opportunities

- Marketing 'sea of sameness'
- Lack of human voice
- Elevation of overall product offering and capabilities
- Economies of scale
- Enhanced operational efficiencies

T Threats

- Client perception that customer service is "not what it used to be"
- Inability to differentiate clinical programs
- Auto business could be vulnerable in light of acquisition
- Ongoing cultural rift

Industry Analysis

Industry

- Similar to 2014, we maintain our characterization as "highly fragmented, mature yet-attractive marketplace with well-established players"

- Sophisticated buyers seek value, particularly in the area of clinical services, and carry a moderate degree of price sensitivity. As a result, while the lowest transaction cost does not always prevail, competitive pricing is a must.

- Less sophisticated buyers talk about value but tend to be more motivated by per transaction pricing

- When it comes to marketing, PBMs sound the same, talk the same, attend the same conferences, work with common subcontractors, and vie for the same business; a relative 'sea of sameness.' **This presents a very real and exciting opportunity for Helios**

Segment Analysis

Insurance Carriers

- Every significant PBM has a long-term, flagship relationship with a top insurance carrier.

- These relationships are very difficult to unseat because payer and provider are tightly integrated with one another; but it is not impossible

- This segment demands operational excellence because it's _their_ responsibility to pay what they owe as fast as possible – therefore, they want it done right

Third Party Administrators (TPA)

- The TPA segment is less monogamous.; in an effort to offer options to their client base, 'preferred' relationships commonly exist with two or more PBM providers

- In these situations, price and relationship are key

- This segment is also financially motivated to get claims paid on behalf of their clients by following the right practices to resolve claims for the right settlement amount

Segment Analysis

Self-insured Employers

- Employers of sufficient size and sophistication to have taken on the responsibility for their insurance program both administratively and financially are generally closely involved with their program's performance

- This segment has an understanding of all aspects of workers' compensation

- Is often the most "hands on" of the segments we serve

Government Entities

- Government entities, regardless of level (local, state, federal), are accountable to their constituents for the results of their cost containment program and must follow various rules and regulations to the letter or else invite criticism or even potential litigation

- This segment is highly focused on compliance and transparency

Audience Personas

Claims Professional; includes adjustor, nurse case manager, team lead, claim supervisor

- Range in age from 35-55

- Commonly female

- Mindset: empathetic; Curious; Solid middle class; Likes a good deal – ex: Kohl's shopper; Frugal – budget minded at work and home; Strong work ethic; Detail-oriented; Stresses; Strong interpersonal skills; Caregiver; Selfless; Do not want or like change; Tech adaptable – don't take charge but follow instructions; Rely on intuition – time is precious; Comfortable with technology but not standing in line at Apple; Hobbies/Community – involved and participate but not a leader

- Seeking tools and education to be the resource, easy access, a trusting relationship, and a feeling of appreciation

- Job performance measured on speed, accuracy and frugality related to claim, outcomes, control, dollars, number of counts, accuracy, proper policy/requirements/law interpretation, and their documentation of all file activities

Audience Persona

Chief Executive Officer; and other leaders in the C-Suite

- Generally 55 or over
- Mindset: He's the head honcho "Blue Suit", married with college-age or grown children and a stay-at-home wife. He does a lot of steak dinners, is closely involved with his community, is part of the old boys' network, well-rounded about business and cares about what his peers think and keeping score. Relationships are very important. Generally, a measured and deliberate decision-maker who values data
- Often relies upon direct reports for product understanding and day-to-day reporting
- Driven to investigate PBM/Ancillary/Settlement Solution products because
  - Doesn't like surprises
  - Evaluated by financial performance
  - Reserve control
  - Capital allocation

Audience Persona

Senior Vice President, Executive Vice President, and other management executives

- Generally age 45-52

- Commonly male gender fills the higher level positions though there is a growing number of female executives in management ranks, particularly in workers' compensation line of business

- Relies on data, quantifiable numbers, and evidence when making decisions. Relationships are also significant. Looking to make their mark on the company and move up, so want to make good decisions that are financially beneficial for the company; looking for ways to make things less expensive and easier on the claim team

- Seeking
  - A partner that will make things easy
  - Data and evidence that confirms they have made the right decision
  - Long-term partnerships
  - Quality, comprehensive solutions
  - Knowledge and insight to get an edge over competition

Audience Persona

Injured Worker (workers' compensation claim) or Injured Person (auto no-fault claim)

- Average age in our book of business is 45
- Mindset: Lack of Control/Lost Control; Didn't want to get hurt; Stressed; Confused; Sad; Grief stricken; In pain; Angry; Afraid; If incapacitated; would work with caregiver; Language barrier; Always looking for guidance; next steps
- Seeking
  – a provider that is compassionate
  – clear direction and information
  – No red tape; want the right answers the first time, without "run around"
  – Customer service that is empathetic, speedy, friendly, dependable, accessible, reliable, and accommodating

Review of the Competition

What is missing from the competitive landscape is a *human* voice.

A message that shows the direct correlation from fulfilling the needs of the injured worker with the financial gains of our clients.

Competitors Discussed

- Healthesystems

- Healthcare Solutions

- MyMatrixx

- Express Scripts

- Coventry/First Script

- OneCall Care Management

HEALTHESYSTEMS

- Founded in 2002
- Headquartered in Tampa, Florida
- Core Products
  - Pharmacy
    - First Fill program
    - EDI connections to SRPS and Walgreens
    - Customizable formulary capability, including acute and chronic, injury and patient specific
    - Standard DUR POS edits
    - Vigilant Rx – Overall Clinical Program
  - Ancillary
    - DME
    - Home Health
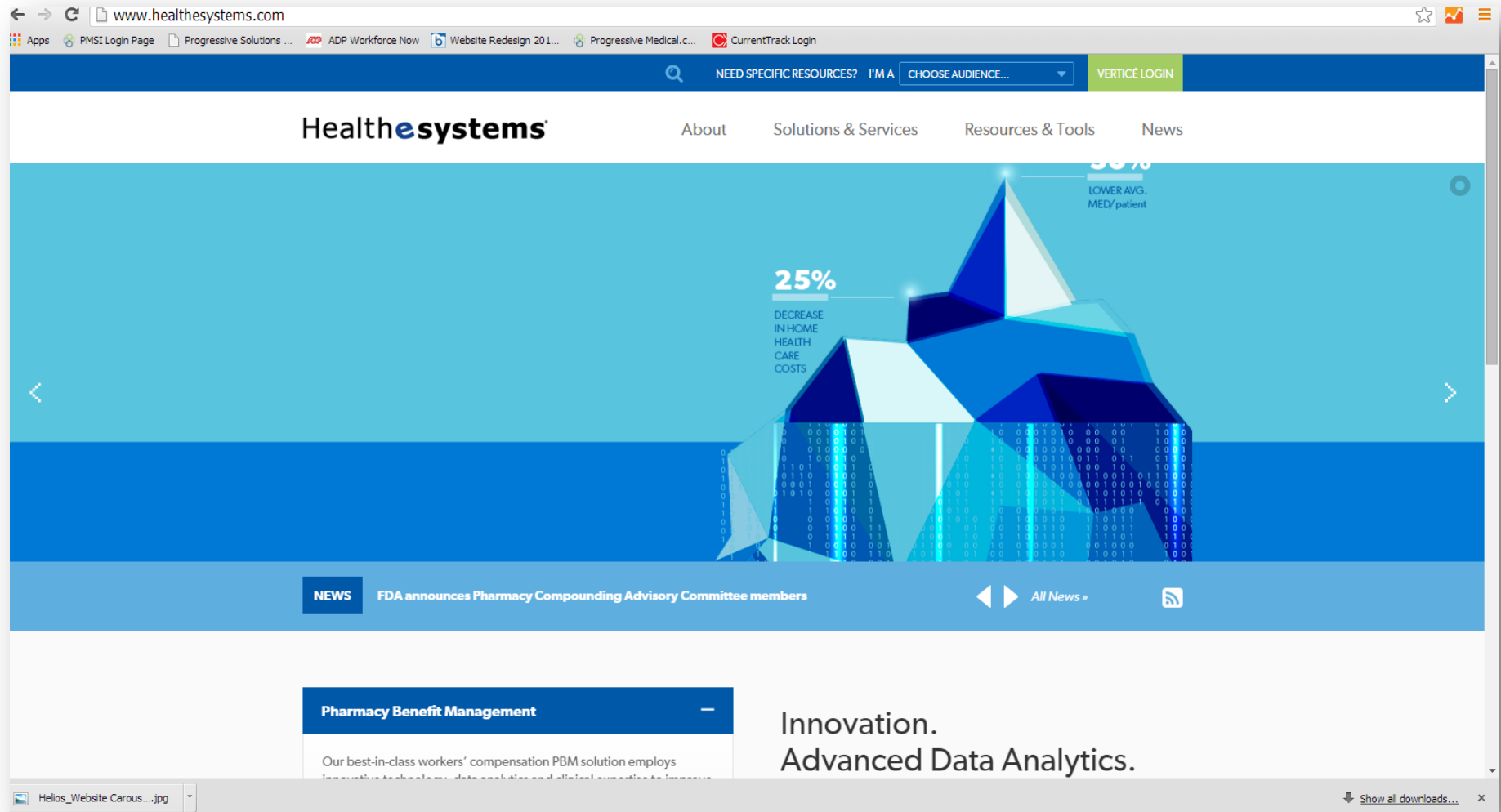   - Transportation
    - Translation
    - Electrotherapy

Messaging and Positioning

- Focus on technology

- Emphasize efficiency and ease

- Vertice claims management tool

- OpioidRx RISC Score Tool (launched in April 2013, this calculates the level of risk a claimant has with opioid therapy using factors like dosage and strength of prescriptions)

Website Homepage

Recent Marketing

- "See how our leading PBM and ancillary benefits management solutions simplify complexities for our customers, reduce medical costs and deliver improved patient outcomes. "

- *RxInformer* quarterly publication with new digital edition

- Multiple features promoting pharmacist, Dr. Silvia Sicalis, VP of Clinical Services

- Refreshed website
    - Animated carousel
    - Clean, simple presentation of information

- Advertising has taken a cotemporary and more modern edge with blue, white, and green color scheme; messaging emphasizing data and clinical subject matter

HEALTHCARE SOLUTIONS

- Founded in 2007

- Headquartered in Duluth, Georgia

- Core Products
  - Pharmacy Benefit Management
  - Specialty healthcare services
  - Non-traditional dispensing PPO networks
  - Medical bill review
  - Case management
  - MSA services
  - DME
  - Home healthcare
  - Catastrophic care services
  - Diagnostic imaging
  - Physical medicine
  - Transportation and language services
  - Home/vehicle/workplace modifications
  - Pharmacy and specialty (Ancillary) networks

Messaging and Positioning

- Through its subsidiary companies, Healthcare Solutions serves as a health services company delivering integrated solutions to the property and casualty markets, specializing in workers' compensation and auto liability/PIP.

- As a company, Healthcare Solutions tries to leverage its abilities along with the strengths of their subsidiaries, including Cypress Care, Procura Management, ScripNet, and Modern Medical to meet the needs of their clients.

- Healthcare Solutions presents a persona that is knowledgeable; pushes the envelope; thought leader; strategic (acquisitions and program initiatives); partner; proactive; responsive; flexible; one-stop-shop (e.g., one partner, one point of contact, etc.).

Website Homepage

Recent Marketing

- Print ads continue to use a toolbox; the concept has been in use for the past two-plus years
- Marketing to adjustors is with a squirrel cartoon character

MY MATRIXX

- Founded in 2001

- Headquartered in Tampa, Florida

- Core Products
  - Pharmacy
    - Customizable first fill program and formulary management
    - Go at-risk for first fill (up to 30-day supply)
    - Out-of-network bill review services offered
    - Standard drug utilization point-of-sale edits
    - Mobile App enables claims management via smart phones
    - myMatrixx 360° communication portal for prior auth requests
    - myRisk Predictor™ patent-pending customizable tool identifies risk score by combining predictive modeling with historical data and unique algorithms established their clinical team
    - Get Ahead of the Claim^{SM} clinical program – misuse, abuse and fraud; myRisk Predictor; alerts sent to client and physician via Alert, Review and Manage (ARM®) program
    - Ask pharmacy to reverse out-of-network prescriptions

Company Bio Continued

- – Pharmacy Products Continued
  - Mail order pharmacy offers auto refill / dispenses compounds
  - Limited clinical resources – numerous functions are outsourced
  - Offer step therapy, customized triggers and prescribing alerts
  - Offer Drug Regimen Review with Peer-to-Peer

- – Ancillary Products
  - 1 Click Ancillary® single-source solution (patented) to order ancillary products and services
  - Claims professionals can submit a referral via phone, email, online, fax or live chat
  - DME; Home Health Care; Orthotics and Prosthetics; Transportation; Language Services; Discharge Planning; Diagnostics and Imaging
  - Claims professional types ICD-9 code for list of commonly ordered items with pricing (Care Cart®)

Messaging and Positioning

- MyMatrixx targets customers that include self-insured employers, TPAs, workers' compensation insurance carriers, managed care organizations and auto insurance carriers.

- Through the combination of advanced technology and proactive clinical management throughout the claims process, myMatrixx claims to deliver a fast, simple, effective solution with proven results.

- The main focus of myMatrixx's strategy is the delivery of high-quality and innovative technology and customer service.

Website Homepage
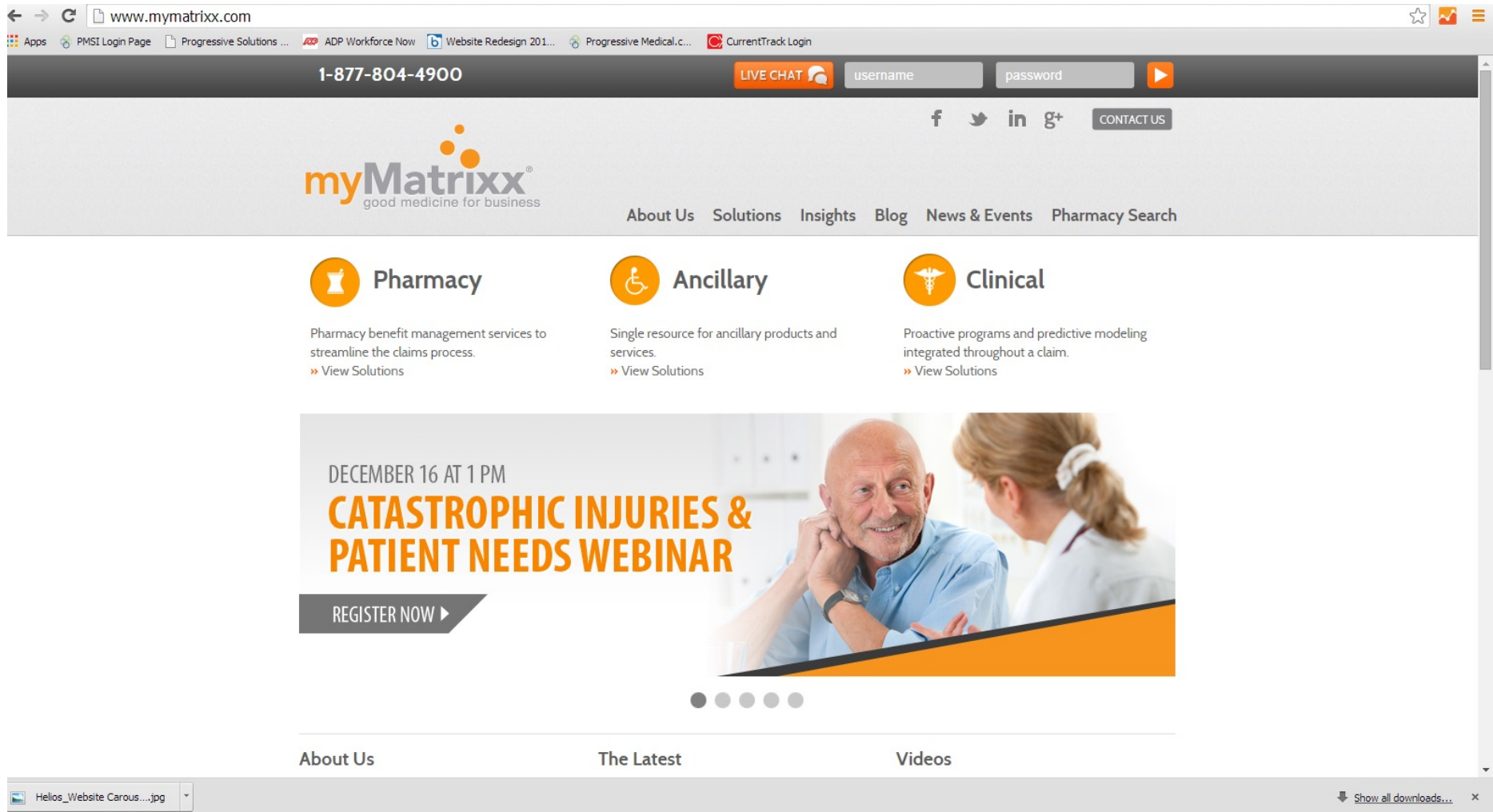
Recent Marketing

Banner Advertising placed in various industry publications matches the carousels found on their website

EXPRESS SCRIPTS

- Founded in 1986

- Headquartered in St. Louis, Missouri

- Core Products

  - Pharmacy

    - PBM services

    - Network pharmacy claims processing

    - Home delivery

    - Specialty benefit management

    - Benefit design consultation

    - Drug utilization review (DUR)

    - Formulary management

    - Medical and drug data analysis services

Messaging and Positioning

- Claims to help their clients preserve the pharmacy benefit and minimize pharmacy-related waste, while improving the health outcomes of the patients they serve.

- Their strategy is to leverage their growth and sizable group health network to remain visible and memorable in the market.

- Attempting to project a persona that is savvy (recruit pharmacies into their network for group health, no need to do so for WC) largely visible (WC and group health and also in the news and stock exchange), confident, autonomous (own their network and mail order pharmacy), competitive, dynamic, persistent

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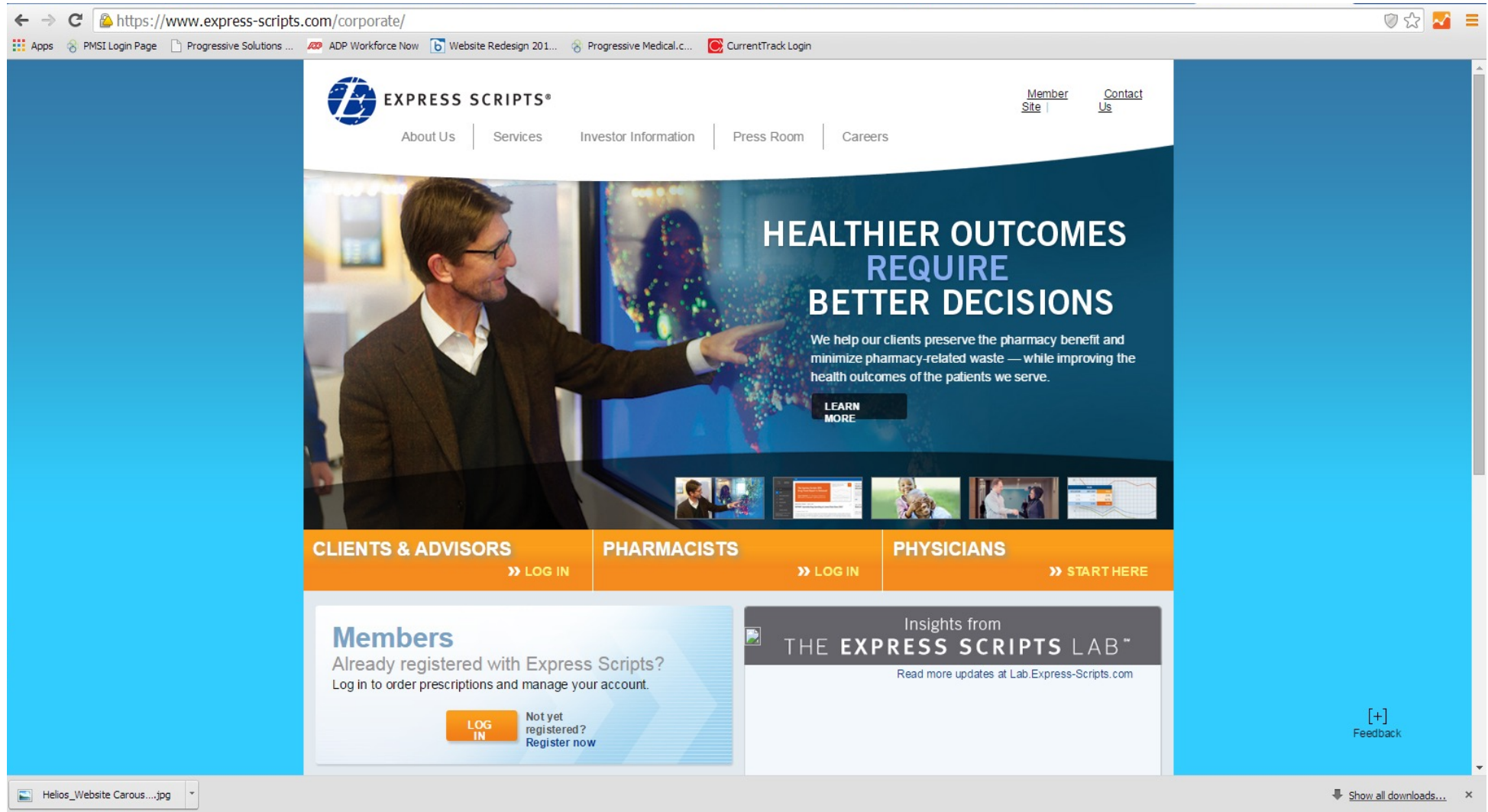
Recent Marketing

- The redesigned lab.express-scripts.com is their new all-in-one website from the Express Scripts Lab that combines their annual Drug Trend Report with weekly insights, data analysis, research publications and current events

COVENTRY

- Founded in 2007 (acquired by Aetna on May 7, 2013)
- Headquartered in Bethesda, Maryland
- Core Products
  - First fill program
  - fsInsight - Online reporting tool
  - Coventry NT24 Nurse Triage – 24 x 7 phone line for IW to call at time of injury; recommend course of action
  - LASER program (locating resistance, active listening, selective reinforcement, empowering change, removing barriers) approach to enhanced case management
  - Coventry Integrated Network®
  - Managed Care Orgainzations
  - PBM
  - Coventry Connect portal for billing
  - Pharmaceutical Review Program
  - Drug Utilization Assessment (DUA) and Peer-to-Peer Review

Company Bio (continued)

- Coventry Connect® provides web-based interface between claims professional's desktop and Coventry's bill review, care management and pharmacy benefit management system.
- BR 4.0 bill review program
- IWs locates nearby providers via text
- Therapeutic Alternative Program looks for cost savings opportunities
- Clinical validation services
- Medical imaging and diagnostic
- Physical medicine
- Telephonic case management
- Field case management
- Independent medical examinations
- Physician review
- DME and Ancillary Services

Messaging and Positioning

- Coventry has a basic positioning statement "No Script Unmanaged. No Injured Worker Left Behind."

- They describe their strategy as driving their plans and actions and aligning with their commitment to execute and deliver on the expectations of their clients.

- Their strategic imperatives are reported as follows

  - Integrated clinical product suite leader

  - PPO and custom networks market leader

  - Operational service excellence

  - Relationship and account management excellence

Website Homepage

Recent Marketing

- Refreshed website
- Messaging promoting urine drug monitoring and compounded medications
- Continue to use the school days theme
- Leader Speak promoting Medical Director, Dr. Linda Bean

ONE CALL CARE MANAGEMENT

- Founded in 1993
- Headquartered in Parsippany, New Jersey
- Core Products
    - Diagnostics
        - MRI/CT
        - EMG and Nerve Conduction Studies
        - Extended radiology services
        - PET and PET/CT Scans
    - Dental and Doctor
        - Dental services
        - Specialty physicians
        - Specialty eye care professionals
        - Hearing professionals

    - Transport and Translate
        - Transportation
        - Language services

    - Home and Complex Care
        - Clinical management
        - Home modifications
        - Assistive technology
        - File review
        - IV/Injectable therapy
        - Respiratory therapy
        - Medical supplies

Company Bio Continued

- Core Products Continued
  - Equipment and Devices
    - Durable Medical Equipment (DME)
    - Mobility products
    - Electrotherapy devices
    - Orthotics and prosthetics
    - Hearing aids
  - Court Reporting
    - Transcripts
    - Reporter access

Messaging and Positioning

- Within the workers' compensation industry, OneCallCare considers itself unique – the only company offering a comprehensive solution of best-in-class services for payers throughout their entire claims enterprise to improve outcomes, lower costs, and enhance efficiency.

- OneCallCare's strategy consists of a robust product and service offering, with a focus on simplifying the claims process supported by quality customer service. The offer a variety of value-added services, such as age of injury services; CEUs; clinical medical report reviews; customized data mining & reporting; early referral notification program; in-house training and support; out-of-network bill conversion service; customizable DME formularies and on-site, discharge planning coordination.

- The persona that OneCallCare attempts to portray is that of a leader; cornering the market; one-stop-shop; industry veteran; service-focused

Website Homepage
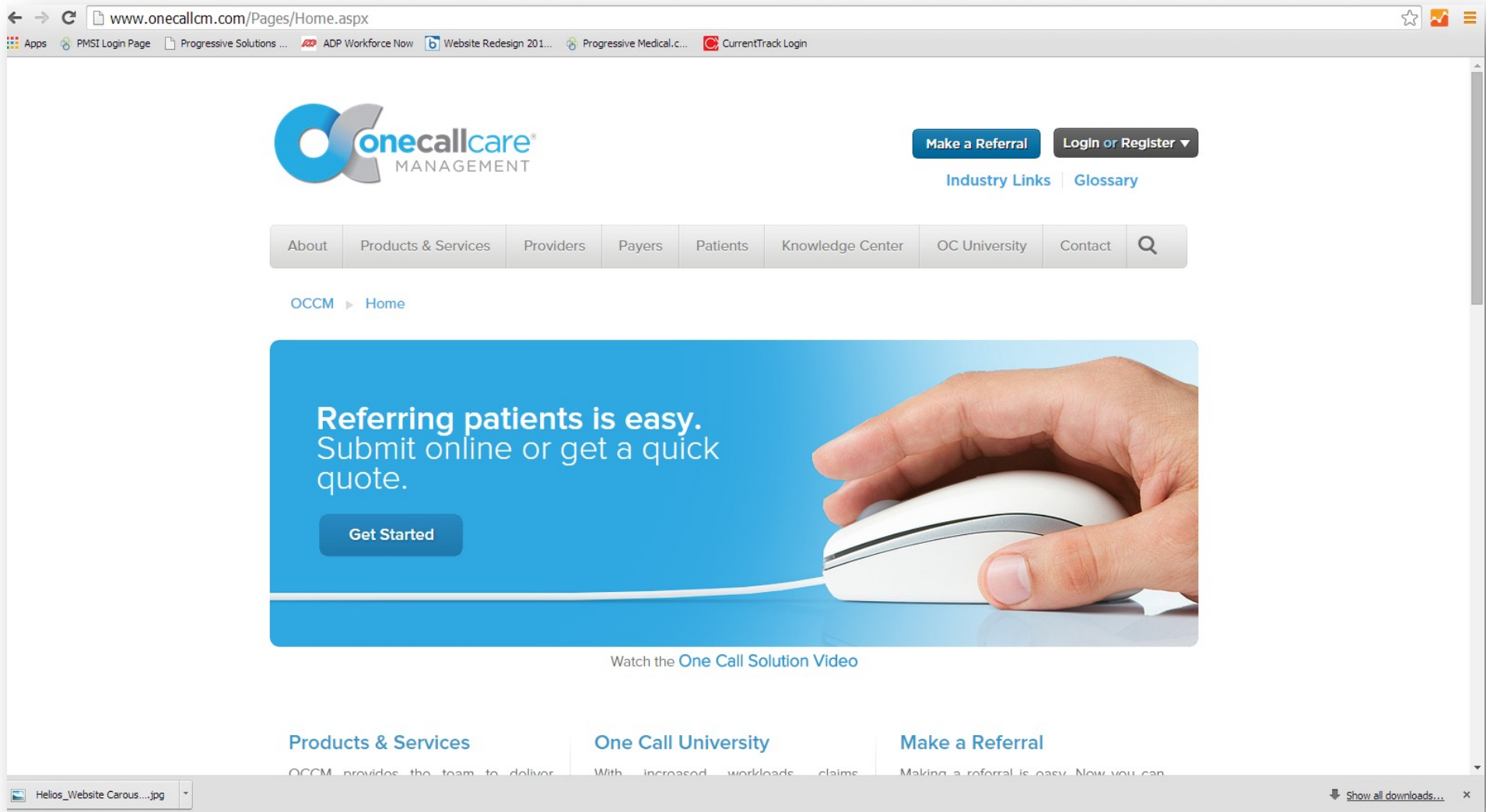
Recent Marketing

- Harbor Health Systems, a One Call Care Management company, launched Care Concierge Services in November 2014.

- Video series at NWCDS

- Banner ads and carousels

Media Share of Voice

- Many competitors experienced changes in coverage from 2013 to 2014. Five competitors saw double-digit decreases in media coverage, while only 2 experienced increases
    - CorVel: -14%
    - Coventry: +16%
    - Healthcare Solutions: -70%
    - Express Scripts: -60%
    - Healthesystems: -10%
    - IPS: -100%
    - One Call Care Management: 0%
    - MyMatrixx: +36%
- For the second year in a row, Express Scripts and Coventry received the most negative media coverage. Additionally, nearly 1/3 of Express Scripts coverage was negative
- The majority, 71.43%, of media coverage for Healthcare Solutions came from news releases

Tally

Bylines, features, mentions, quotes, and syndicated coverage
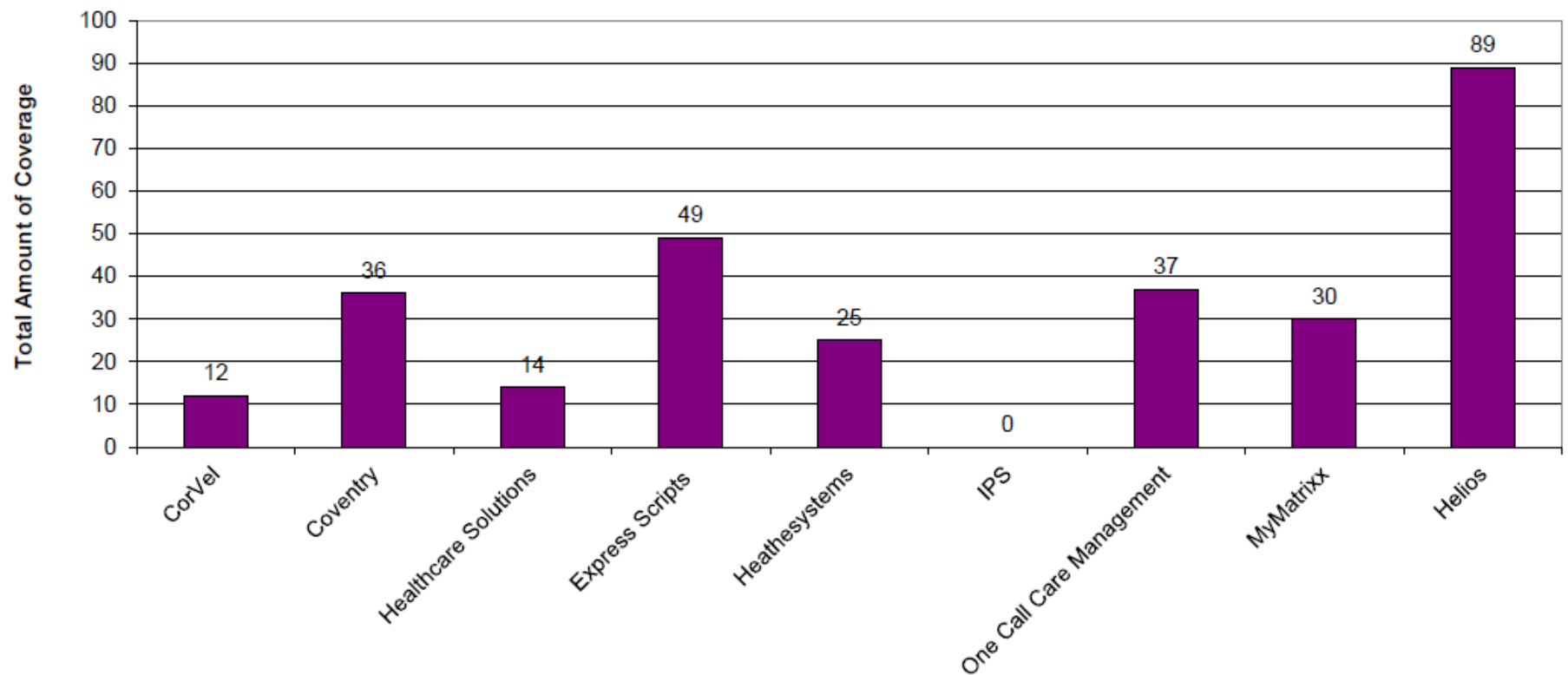
Competitors Use of Social Media

	Express Scripts	myMatrixx	Coventry	HealtheSystems	Gould & Lamb	Crowe Paradis	Healthcare Solutions	One Call Care Management
Blog	The Lab – At least weekly content	Yes – About monthly content	Industry Insight – more like news items, last updated July	HealtheNews – Not a lot of reg posts	The Medicare Compliance Blog – Posts approx. 1 per month	Deactivated, but still have link on website	No	No
Linkedin	51,505 Followers Reg updated	2,013 Followers Fairly reg updates	22,797 Followers Not updated in 11 months, no link on website	1,102 Followers Reg updates No link on website	557 Followers Not overly reg posts	No	296 Followers Fairly reg updates	1,913 Followers Don't reg update
Twitter	820 Followers 756 Tweets	455 Followers 634 Tweets Not updated since Sept. 30	194 Followers 111 Tweets Fairly reg updates, but no link on website	226 Followers 620 Tweets Reg updates, mainly job postings	752 Followers 1,032 Tweets Did have reg. tweets, but none since Aug 22, auto populated through Constant Contact	No	No	No
Facebook	929 Likes – no link on website Reg updates – appears to be more health and wellness	433 Likes Not updated since Aug. 25 – promotional, events	No	174 Likes Reg updates, seems to be employee focused	No	No	134 Likes Adventures of Les the Squirrel Reg updates	No
SlideShare	4 Presentations, no page	No	No	No	No	No	No	No

Our Brand

Brand Promise

We empower our clients to do what's right for the injured person by ensuring the right decisions are made at the right time, which will protect their financial interests and result in brighter outcomes

Brand Pillars

Our passion to provide superior customer service and account management, and our promise to always be accountable

Our creativity and vision that results in innovations that drive down costs before they go to settlement and ensure the right decisions are made at the right time

Our commitment to being proactive - getting our customers ahead of trends and in front of negative behaviors before it impacts their business

Our advocacy for a better industry

Core Traits and Attributes

- Willing to make the tough decision

- Dedicated to positive experiences

- Always shoulder to shoulder

- We do what's right

- We are confident, passionate, intelligent, inclusive, approachable, honest, and reliable

- We act with
  - Informed integrity
  - Well-thought passion and tenacity
  - Assured but powerful humility
  - Respect for ourselves and others, along with their circumstances

© 2006 Ted Goff www.newslettercartoons.com

"Funny hats is just one more thing that sets our company apart."

Integrated Marketing and Communications Strategy

Corporate Marketing Objectives

- **Create brand awareness and foster brand loyalty**

- **Communicate in a manner that engages our audience such that they** clearly understand what the brand stands for, the direction of the company and products/services we deliver to question their preference (if a prospect) or affirm their decision (if a client)

- **Stimulate sales**

- **Improve departmental operations**

- Web/Social Media/Video
- Public Relations
- Thought Leadership

MEDIUM

- Brand Promise
- Brand Pillar
- Informal/Personal

METHOD

MARKET

- Payers & Media
- Claims Professional
- Injured Person

MESSAGE

- Value Proposition
- Functional Benefit
- Emotion
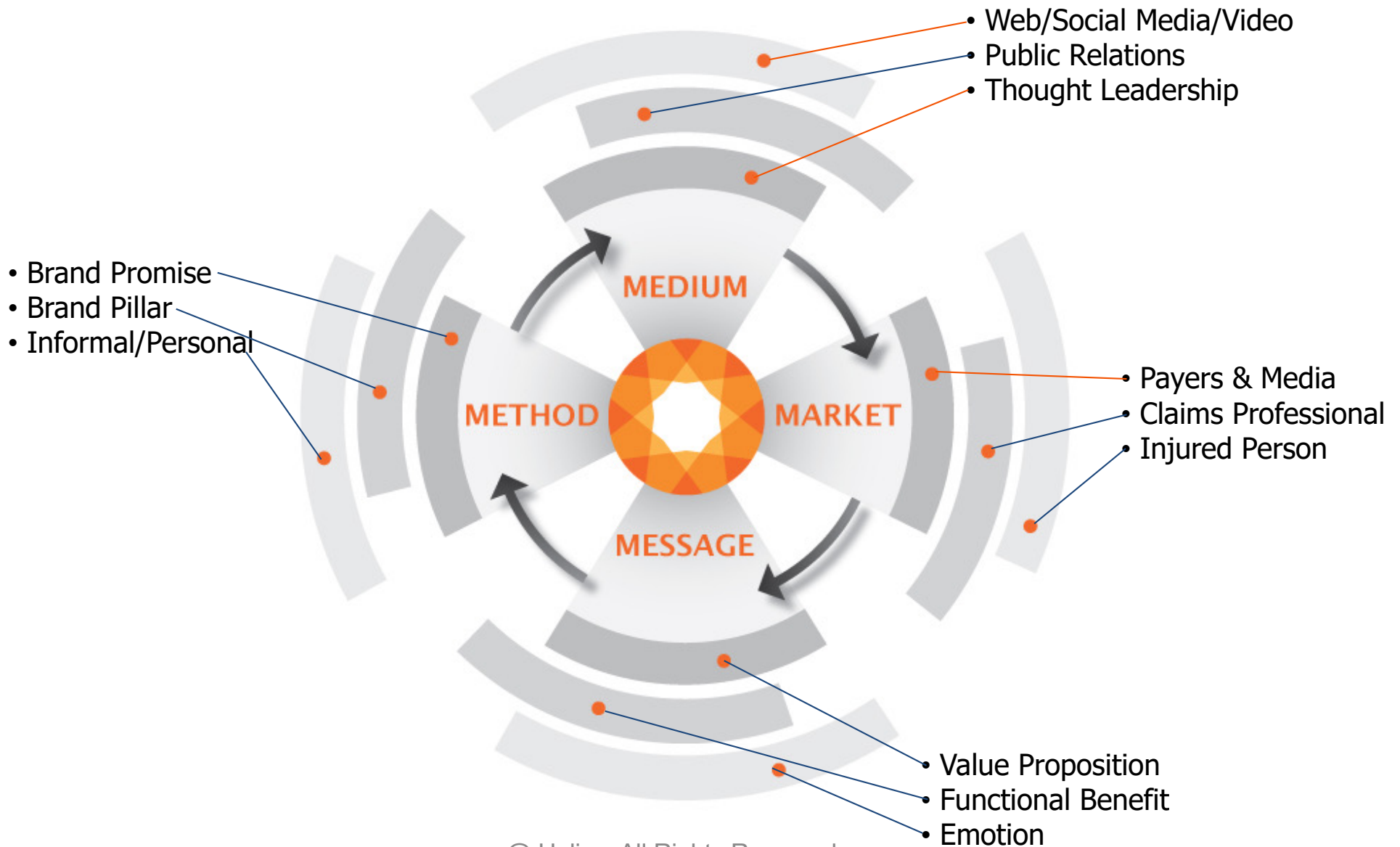
Target Audience

- **Target Characteristics**
  - Financially stable
  - Philosophically focused on outcomes
  - Possessing a certain level of sophistication such that they understand the importance of evaluating a PBM on more than transaction costs alone
  - Seeking collaborative partnerships, are loyal, and value empowering, partnership relationships.
  - Have EDI capabilities
- **Target Size** - organizations with an annual pharmacy spend of $1mm or more, with emphasis on opportunities of $2mm - $20mm unless there is a strategic reason to deviate from the target

Target Audience

- Primary
  - Payers
    - Insurance Carriers
    - Third Party Administrators
    - Self-Insured Employers
    - Government Payers
  - Industry Media
- Secondary
  - Claims Professionals
    - Claims Managers
    - Claims Adjusters
    - Nurse Case Managers
  - National Media

- Tertiary
  - Injured Workers
  - Injured Parties

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"It's not that I don't like you, Ted, you just don't fit my target demographic."
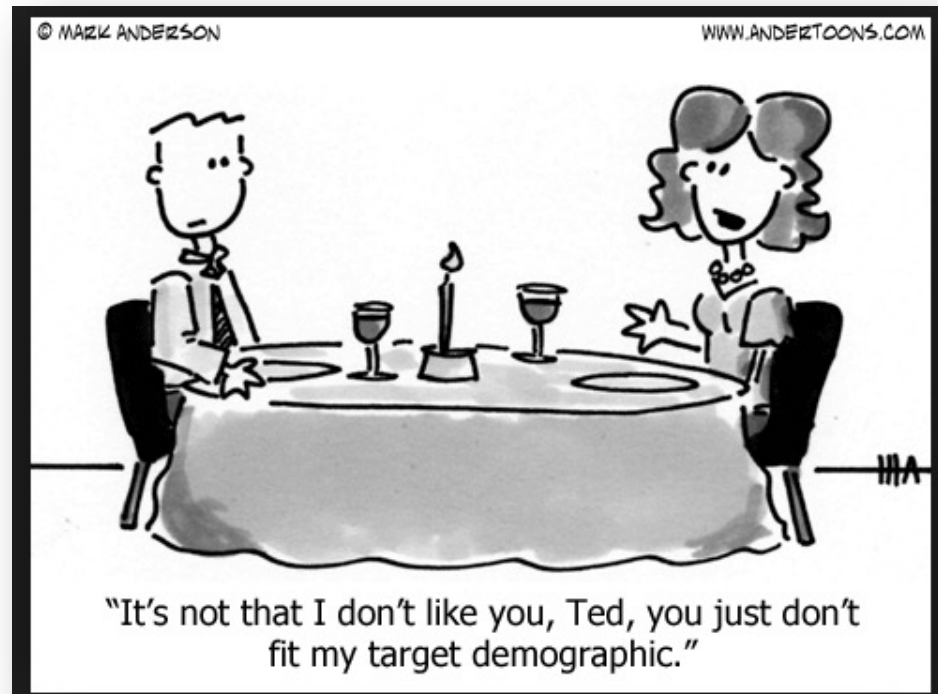
Creative Strategy

- Language will clearly communicate the benefits of our solution over competitor offerings

- Tone will be humble, approachable, non-boisterous, respectful, authentic, mature, and full of integrity

- Design will be contemporary, clean, with appropriate use of white space, favor towards highly impactful images that naturally communicate the message using light, forward motion, nature, and other elements

- Emphasis will be on differentiating our products and services while continuing to build loyalty for our brand

- See the 2015 Master Creative Brief for more details

Content Strategy

- We will produce content that elevates the brand and stimulates engagement with our company using target market language that demonstrates expertise in their industry (and ours), and that we know what our clients need today (as well as tomorrow)

- Key industry trends for which we will demonstrate comprehensive understanding and solutions include (but are not limited to) chronic pain, physician dispensing, compounded medications, collaborating with physicians, fraud, waste, and abuse, medication trends, early intervention, analytics, government affairs, AWP, and new medications/treatments

- See the Communications Plan for more details

Promotional Mix

- **Advertising**

- **Thought Leadership** includes blog posts, social media conversations, white papers, position papers, articles, bylines, quotes, videos and info-graphic pieces that address important industry issues that impact our business (and our clients) today and tomorrow

- **Educational Offerings** include newsletters and product materials that keep our clients "in the know" as well as courses that provide attendees with continuing education credit

- **Social Media** will emphasize Facebook, LinkedIn, and Twitter.

- **Public Relations and Publicity**

- **Events and Sponsorships** at both the National and Regional level

- **E-communication, brochures and other collateral materials**

Advertising Plan
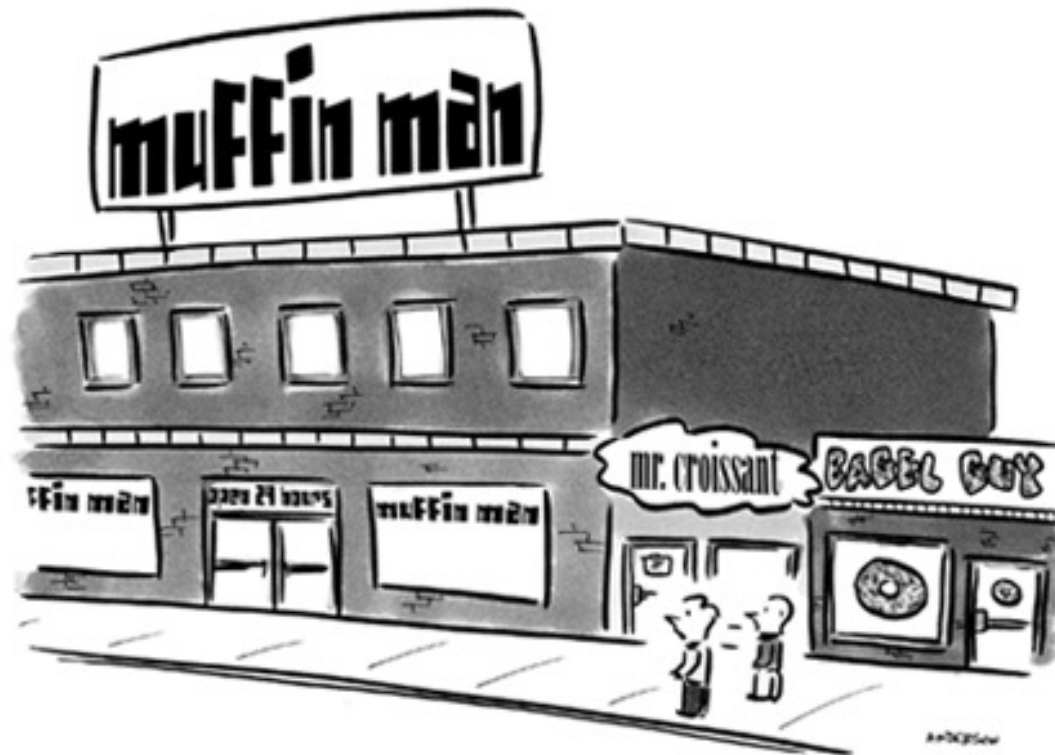
"You gotta admit, it's a catchy jingle."

Objective

- Enhance brand awareness of and improve brand recognition for the Helios brand with our target audience
- Establish a consistent cadence across print and digital channels, maximizing impressions
- Drive engagement
- Reinforce our market position

Audience

- Primary audience is executive-level decision makers, generally VP or Higher
- Secondary audience is claim professionals, nurse case managers, risk managers, agents/brokers, payer leadership, government affairs/compliance, and other persons active in workers' compensation claim management, cost containment, and/or procurement
- Tertiary audience is media and industry analysts

Tactics

- Run compelling print and digital ads that include a call to action
- Author relevant, meaningful content
- Augment value of placements with media engagements such as articles, mentions, bylines, interviews, and other communication vehicles to assure an integrated, multi-channel campaign
- Deploy a well-thought out, multi-channel, integrated campaign that is
  - Distinctive
  - Memorable
  - Evocative
  - Emotive
  - Trustworthy and believable
  - Visually clean, contemporary, polished, and authentic
  - Tonally approachable, professional, and intelligent

Metrics

- Engagement
  - Direct with Helios, such as clicks, requests for materials, telephonic inquiries, web traffic, media generation, and other responses to call to action in the ad
  - Indirect via the publication, with their reported metrics such as impressions, time spent on our pieces, clicks, requests for white papers, and comments on our pieces; to name a few
- Readership Surveys
- Contribution to Share of Voice
- Word of mouth feedback pertaining to ads

Publications

- Business Insurance

- CFO Magazine

- Claims Management

- Leaders Edge

- Risk & Insurance

- Risk Management (RIMS Magazine)

- WorkCompCentral

- WorkCompWire

- Workerscompensation.com

Business Insurance

- Total circulation for the print magazine is 44,000, it is disseminated on a bi-weekly basis
- Subscribers are comprised of risk executives, chief officers, insurance agents, and adjustors
- The publication covers all lines of insurance with regular features on workers' compensation
- Published by Crain Communications, Inc.
- **Commentary:** while they provide solid coverage, from an advertising standpoint, it is expensive and the potential for impact just isn't evident. Feeling is that a better approach is to foster media relationships to assure coverage of our news/events/thought leadership. Accordingly, no advertising dollars are allocated to this publication.

CFO Magazine

- Total circulation for the print and digital magazine is 444,000+, it is disseminated on a monthly basis. Also, CFO Magazine receives approximately 300,000 web visits per month and 725,000 page views

- Audience is comprised of executives in the financial, IT, and insurance services; including corporate liability/risk management, property/casualty liability and employee benefits; 16% manufacturing (one of top 5 industries prone to injury)

- Considered the number one magazine for CFOs and 74% read more than 3 issues of out 5

- **Commentary:** the publication is in an attractive vertical reaching financial and executive-level professionals, and as such, we are recommending a short run of digital placements and a sponsored email. This said, if there is a need to reduce total advertising dollars this is where a cut may be made without any foreseeable negative impact to our advertising strategy.

Claims Management

- Total circulation for the print magazine is 18,000, it is disseminated on a monthly basis.

- Audience is comprised of claim vice presidents, directors, managers, and adjustors, defense attorneys, claims services, corporate risk managers, claims and litigation managers.

- The publication emphasizes claim litigation and resolution.

- Published by the Claims and Litigation Management Alliance (CLM).

- **Commentary:** This is another publication where media relations and editorial pursuits appear to be more valuable than advertising. If advertising dollars remain after the core plan is established it may make sense to opportunistically pick up a digital and/or print placement but otherwise, no perceived harm by not allocating advertising dollars to the publication right out of the gate.

Leaders Edge

- Total circulation for the print magazine is 15,000, it is disseminated on a monthly basis and is a prestige publication.

- Audience is comprised of executives (upper level and c-suite) and includes a venerable "who's who" in the insurance industry.

- The magazine focuses on issues of importance to insurance executives, including legal and legislative issues, international regulation and business, management tools and tips, technology, carrier news and even insurance humor.

- In addition to being readers, many of our clients also advertise in this publication. None of our competitors advertise with Leaders Edge.

- **Commentary:** Leaders Edge is a high quality, prestige publication. Their print magazine is beautiful; content well-written, and readership is distinguished. This is the crowd we want to be a part of. Recommendation is for quarterly placements, print format.

Risk and Insurance

- Total circulation is 29,488 (they quote a high print pass along at 173,000) and digital is much less at 7,881, it is disseminated monthly

- Website was redesigned last year to be fully responsive and more contemporary with emphasis on content

- Email subscribers for R&I One and Forum are approximately 30,000 each

- Audience is comprised of claims professionals, risk managers, finance, human resource, and executive management in the workers' compensation industry

- Published by LRP

- **Commentary:** If you are involved in workers' compensation, this publication is a must. All of our competitors are very active with Risk & Insurance, as are our clients and prospects. The publication has a strong following as well as a strong editorial calendar. They are also active in the program business and alternative risk markets, which offers opportunities for additional impressions in areas we do not generally emphasize yet may be important; particularly alternative risk. Accordingly, the bulk of our advertising dollars are allocated to this publication.

Risk Management Magazine

- Total circulation is 18,461, it is disseminated 10 times per year (combined issues in Jan/Feb and July/August)

- Website averages 43,200 site visits per month

- Audience is comprised of presidents/CEOs, risk managers, insurance companies, and TPAs

- Published by Risk Management Society Publishing, Inc., an affiliate of the Risk and Insurance Management Society, Inc.

- **Commentary:** This is an industry staple, highly respected, and overall, a cost-effective vehicle through which to reach our target audiences. Recommendation is for two flights that bookend key conferences and use of their new listing to promote thought leadership.

WorkCompCentral

- This is an online site devoted to taking the complexity out of the workers' compensation system, providing an easy to understand recitation of the law; reports on news of industry events; and educates those affected by workers' compensation.

- Target audience includes insurance executives, attorneys, physicians, claims managers and adjusters, risk managers, self-insured, business owners, human resource professionals, and other stakeholders.

- There are 39,000 registered visitors, 15,000+ registered daily newsletter subscribers, and nearly 7,000 unique visitors per month

- The site is maintained by WorkCompCentral, Inc.

- **Commentary:** over the past two years we have developed a nice media relationship with this organization and are regularly called upon for comments. We've scooped this media outlet twice. Competitors are visible here and some level of presence in 2015 seems to make sense. As such, the 2015 recommendation does allocate dollars to this outlet.

WorkCompWire

- Current email subscriber base is over 4,800 and growing.

- The website generates more than 17,000 page views a month on average and engagement is also very high for their user base, with Partner Posts and Leaders Speak typically have average on-page times of over 2:30 (minutes).

- Audience includes insurance professionals and stakeholders, including mid and upper level executives.

- **Commentary:** presently our competitors are very active on the site, both in advertising and in providing copy. Additionally there is strong philosophical alignment in approach to content, digital engagement, and thought leadership. It would be prudent to improve our level of visibility on this site. Accordingly, the 2015 plan recommendation includes a blend of banner ads and partner posts, allowing us to promote content and thought leadership. We'll also secure Leader's Speak placements as we did in 2014 for additional value.

WorkersCompensation.com

- The site receives nearly 50,000 views per month, cultivated in part by well-known industry blogger Bob Wilson.

- The site provides news, information and resources on the human resources and workers compensation labor industry. Editorial covers major HR news at the state and national regulatory level and covers legal, personnel and government announcements. The site also covers issues by category and offers extensive resource information to support additional data needs of the HR community. Content is also searchable by date and includes content organized for workers, employers, professionals and hot topics.

- The site is published by WorkersCompensation.com, LLC

- **Commentary:** Unfortunately, the quality of the website is somewhat unattractive and dated so while we do appreciate their coverage of our activities and commentary, it's just not a place to advertise. As such, no dollars have been allocated to this outlet.

Schedule at a Glance

	January	February	March	April	May	June	July	August	September	October	November	December
R&I		X	X	X	X	X	X	X	X	X	X	X
RM				X	X					X	X	
WCW				X	X		X		X	X	X	
WCC^	X	X	X	X	X	X	X	X	X	X	X	X
LE+		X		X		X			X			
CFO*				X	X				X			

^Digital ad every Monday issue
+Jan/Feb is a joint issue
*If CFO included

KEY
R&I   Risk & Insurance
RM   Risk Management Magazine
WCW   WorkCompWire
WCC   WorkCompCentral
LE   Leaders Edge
CFO   CFO Magazine

Continuing Education Program

"Can I get continuing education credit for stories that never cease to amaze me?"

© Benita Epstein

CE Program Summary

Continuing education courses keep our clients and prospective clients informed on the leading issues impacting our industry. This information helps them to more proactively manage and make better decisions on claims to achieve brighter outcomes.

The courses also provide opportunities to earn continuing education credits, which is a valuable and necessary resource for adjustors, nurses, case managers, and others to maintain their credentials.

The year-long schedule of one-hour courses are available in a variety of mediums including:

- Live in person
- Live online webinar
- Online only

Goals

- Provide clients with useful information on relevant industry issues so they can make better decisions and gain greater understanding to be more effective
- Demonstrate experience and deep knowledge of our business
- Entrench Helios as THE pharmacy expert in our industry
- Offer opportunities for clients and prospective clients to earn continuing education credits

Objectives

– Produce four-five new webinars on topics that are important to our clients and prospective clients

– Achieve between 300-400 registrants for each occurrence of the Compounded Medications, Urine Drug Monitoring, Fraud Waste and Abuse (parts 1 and 2), and Specialty Medications webinars

– Achieve between 200-300 registrants for the Therapeutic Drug Information Series webinars

– Maintain at least a 50% attendance rate in relation to the webinar registration number

– Receive satisfaction ratings of at least 4 out of 5 for all our presentations

– Have at least 50% of webinar attendees attend at least two of the 2015 webinar series offerings

Tactics

- Create an email be to distributed on January 5, 2015, by account management and sales staff, which will promote our 2015 CE schedule and provide links for easy registration

- Promote our 2015 CE schedule and provide registration information at live events, i.e. regional and national trade shows

- Prepare a power point slide which can be added to quarterly business reviews and sales and training presentations to promote our 2015 CE schedule and provide registration information

- Update Continuing Education page at www.helioscomp.com with webinar schedule, webinar registration links, webinar descriptions, and available CE credits

- Create a follow-up document for each of the 2015 series webinars to be sent out to all webinar registrants. This document may contain additional information about the topic, answers to webinar questions, additional resources, etc.

Metrics

# of registrants	The number of registrants for a webinar will help us determine if our topics are of interest to our client base. The four webinars held in 2014 (Drug Trend Report, Physician Dispensing and Compounded Medications, Opioids Misuse and Abuse, and Controlling Utilization Through Formularies) were promoted to our client base and each received between 300 and 500 registrants. No CE credit was offered for these webinars.
	The 2015 series of webinars, which includes Compounded Medications, Urine Drug Monitoring, Fraud Waste and Abuse (parts 1 and 2), and Specialty Medications, will be heavily promoted via email, on our website, and at live events and client meetings.
	Each new webinar topic will be presented twice throughout the year, which may result in lower registration numbers for each individual event. Still, with the appropriate promotion and available CE credits, our goal is to achieve between 300-400 registrants for each occurrence of a webinar.
	Our schedule also includes four Therapeutic Drug Information Series (TDIS) webinars. These webinars were previously 30 minutes in length and did not offer CE credit. These webinars will be transformed into one-hour events and will offer CE credit. Our goal is to achieve between 200-300 registrants for these webinars.

Metrics

# of attendees	The number of attendees as compared to the number of registrants is often quite different as schedules change, meetings come up, and priorities shift making it difficult for someone to log on to a webinar. A person's registration for a webinar lets us know that they are interested in a topic. Their attendance means that we have appropriately hit their interest and their schedule. Since each of the 2015 webinar series topics will be offered two times, we are providing options to make sure we can meet the schedules of our clients and potential clients. Our goal is to maintain at least a 50% attendance rate in relation to the registration number.
Duration of stay	The duration of stay defines the average of how long people remain logged in to a webinar. To be eligible for CE credit, an attendee must be logged in for a the entire presentation in order answer the poll questions
Activity during the webinar	Questions asked and comments given through the webinar software's chat/question box or immediately following webinar completion are often a good indication of attendee interest level and the quality of the information provided. While it is nearly impossible to predict how many questions or comments will be received for each event, we will answer questions during the webinar as time allows, provide answers in a follow-up document, or respond with a personal email to a specific webinar attendee.

Metrics

Presentation rating	We will include surveys at the end of the four new webinar topics to gather data on the information provided, the usefulness of the information, and the success of the presenter. Our goal is to receive satisfaction ratings of at least 4 out of 5 for all our presentations.
# of returning attendees	Webinar attendees who register for and attend multiple Helios webinars are a good indication that they value our content and Helios as a thought leader and expert in the industry. While each webinar can stand on its own with its content, we will promote the series as a whole to drive attendees to keep coming back. Our goal is to have at least 50% of webinar attendees attend at least two of the 2015 webinar series offerings.

Continuing Education Credits

► All webinars on our 2015 schedule will be submitted for CE accreditation to all states that require prior approval

► If a state does not require prior approval, the attendee will need to submit their attendance certificate to the appropriate state agency to determine if CE credits can be applied

► Webinars on our 2015 schedule are generally submitted to the following national agencies for CE accreditation:
  - California Board of Registered Nurses (CABRN)
  - Certification of Disability Management Specialists (CDMS)
  - Commission for Case manager Commission (CCMC)
  - Commission on Rehabilitation Counselor Certification (CRCC)
  - Certified Medicare Secondary Payer (CMSP)
  - Delaware Board of Nursing (DEBRN)

NOTE: Submission for accreditation does not mean that all the webinar presentations will be approved for each CE type. As approval information is received, we will update the website and other promotional materials

2015 Course Offering

- The chart below lists our current one-hour courses along with the state and agency CE credit available; online versus live is also shown

	Course Title	Online Courses	Live Webinars
Pharmacy Courses	Compounded Medications	State specific CE is available from all states EXCEPT: AL, AK, FL, GA, IL, IN, MS, MT, NC, OK, PA, TN, TX, VT, WY	State specific CE is available from all states EXCEPT: IN, MS, PA, TN, VT, WY
	Insomnia in Workers' Compensation		
	Mental Health among Injured Workers		
	Non-musculoskeletal Industrial Injuries		
	Pain Management in Workers' Compensation		
Catastrophic Care Courses	Accessible Housing Guidelines for Independent Living	National credit CE is available from agencies: CABRN, CDMS, CCMC, CRCC	National credit CE is available from agencies: CABRN, CDMS, CCMC, CRCC, DEBRN
	Managing Head Injuries		
	Pressure Ulcer Prevention and Management		
	Spinal Cord Injury: Overview, Planning and Management		

Note: Depending on the audience size (a minimum of 50 attendees on site), all these courses may also be presented as live events.

2015 Webinar Course Schedule

Date	CE Course Content
21-Jan	Compounded Medications – Liberty Mutual only
22-Jan	Compounded Medications
28-Jan	Compounded Medications – Liberty Mutual only
3-Feb	Therapeutic Drug Information Series (TDIS)
19-Feb	Urine Drug Monitoring
26-Mar	Fraud Waste and Abuse part 1
23-Apr	Fraud Waste and Abuse part 2
5-May	TDIS
25-Jun	Specialty Medications
7-Jul	TDIS
23-Jul	Compounded Medications
24-Sep	Urine Drug Monitoring
22-Oct	Fraud Waste and Abuse part 1
29-Oct	Fraud Waste and Abuse part 2
3-Nov	TDIS

NOTE: All webinars listed above will be held from 1:00-2:00 p.m. ET.

Promotional Schedule and Tasks

► Program flyer distributed at live events and via pdf by account management and sales

► Power point slide added to quarterly business reviews as well as to sales and training presentations

► Update Helioscomp.com website with webinar schedule and links to register

► Email campaign to promote 2015 CE schedule and provide links for easy registration information; each email will promote the entire schedule but include more information on the next one or two webinars to take place

Date of Course	CE Course Content	Program Promotion Schedule (E-communications)
21-Jan	Compounded Medications – Liberty Mutual only	January 5
22-Jan	Compounded Medications	January 5
28-Jan	Compounded Medications – Liberty Mutual only	January 23
3-Feb	TDIS content	January 26
19-Feb	UDM	February 13
26-Mar	Fraud Waste and Abuse part 1	March 16, March 24
23-Apr	Fraud Waste and Abuse part 2	April 13, April 21
5-May	TDIS content	April 27
25-Jun	Specialty Medications	June 11, June 23
7-Jul	TDIS content	July 1
23-Jul	Compounded Medications	July 13, July 21
24-Sep	UDM	August 14, August 22
22-Oct	Fraud Waste and Abuse part 1	October 12, October 19
29-Oct	Fraud Waste and Abuse part 2	October 12, October 19, and October 27
3-Nov	TDIS content	October 27, November 30

Corporate Communications Plan

Overview

- Corporate Communications is an important strategic function within the Marketing team, playing a key role in how investors, employees, clients (prospective and current), competitors, media, and the public perceive our company.

- Activities performed by the communications team help build the brand, foster relationships, provide guidance in times of crisis (or otherwise), and monitor not only the competitive landscape, but the industry overall.

Boiler Plate *About Us* Paragraph

Helios, the new name for Progressive Medical and PMSI, is bringing the focus of workers' compensation and auto no-fault pharmacy benefit management, ancillary services, and Settlement Solutions back to where it belongs – the injured party. Along with this new name comes a passion and intensity on delivering value beyond just the transactional savings for which we excel. To learn how our creative and innovative tools, expertise, and industry leadership can help your business shine, visit www.HeliosComp.com.

Goals

- To generate positive brand awareness for our company
- To demonstrate industry expertise, experience, and leadership by providing insight and perspective on relevant industry influences, trends, and challenges
- To support corporate goals and objectives related to growth and retention

Key Tactics

- Create and manage a **content calendar** that facilitates regular release of thought leadership publications, such as white papers, case studies, bylined articles, video, info graphics, continuing education and webinars, and sponsored content

- Utilize a **Communications Editorial Board** comprised of the company's Subject Matter Experts (SMEs) from every department

- Broaden our reach within the industry through a **corporate-wide blog** and promotion via **social media** channels

- Maintain a strong presence in industry news through a proactive campaign of regular **press releases and media outreach**

- Employ **email communications** to keep customers informed of important industry news

- Participate in industry **speaking engagements** to share knowledge, keep the company top of mind, and expand our position as an industry thought leader

- Deliver a contemporary and impactful **digital experience**, leveraging the website as a communication vehicle that drives engagement and supports the overall communication strategy

Content Marketing

CONTENT MARKETING

Summary

–   We will utilize a content calendar, inventory of assets, and a Communications Editorial Board (CEB) comprised of the company's Subject Matter Experts (SMEs) to align corporate communication initiatives with current trends in, influences to, and interests of the Workers' Compensation and Auto No-Fault industries, which we, as a company, are prepared to address.

–   As a result, we will ensure that we are current, topical, and in alignment among all areas of the company, discussing the right issues and promoting the right solutions to continue to build a strong brand with consistent messaging.

Goal and Objectives

- Goal
  - To continually populate a Content Calendar with a proactive release of contemporary, current, and relevant thought leadership materials at the right time, in concert with all areas within the company, building a consistent and strong brand.

- Objectives
  - To establish a Steering Committee for a Communications Editorial Board (CEB) and hold a first meeting in December, 2014. The Steering Committee will be tasked with selecting topics to focus on and the SMEs to sit on the CEB.
  - To create and maintain a calendar of content which addresses key topics for each line of business throughout 2015.
  - To create and distribute at least two, on-brand, thought leadership assets every month in 2015, and distribute across many vehicles.
  - To create a repeatable content creation process that efficiently and effectively ensures we have the content we need to generate brand awareness and establish Helios as the undisputed industry thought leader.

Content Calendar

- Purpose
  - A guiding document that allows us to plan and record all communications activities
  - Ensures we are focusing on the right topics at the right time
  - Engages buy-in from executive team/account management and provides advance notice of communications plans so Communications team can execute smoothly
  - Allows at-a-glance view of the channels, vehicles, and topics we are embracing and those we may be missing
- The Content Calendar contains
  - Calendar of planned and executed activities
  - Inventory of current, proposed, and past content by key issue and vehicle
  - Speaking engagement details
  - Media relations pitch map

Content Calendar - Schedule

Thought Leadership Vehicle	White Paper	Case Study	Articles	Sponsored Content	Video	Blog	Infographic/Web Carousel	Webinar/CEU	Press Release	Awards	Speaking Engagements
January '2015											
Wk of 1/5	Understanding NDC and HCPCS; Ancillary Awareness		1/7 - R&I Quicker Care With Telemedicine (Dr. Hall)	1/2 WorkCompWire - Leaders Speak (J Anderson) re-run		1/7 - OR Federal Court rejects arguments (SS) 1/7 - CMS releases updated user guide (SS) 1/8 CMS Publishes Ref Guide (SS) 1/9 - CMS Publishes					
1/12						1/12 - LA Appellate Court agrees on fraud (SS) 1/14 - MEDs (PH)					
1/19			1/22 - WorkCompCentral: AAPAN speaking engagement (Brian) 1/22 - workerscompensation.com: AAPAN speaking engagement (Brian)	1/20 R&I Feb Print Ad due		1/20 - PA Bankruptcy court (SS) 1/20 - Tribute to Utah Speaker (GA)		1/22 Compounds	1/20 - AAPPO - Brian Allen		1/25-27: AAPPO Forum, Brian Allen; 1/22 Louisiana WC Conf, Rafael
1/26			1/28 - workerscompensation.com - speak at execusummit (Brian) 1/29 - workcompcentral - Generic Drug Price Inflation Appears to Have Hit Opioids Harder - Tron			1/28 - Depression (PH)			1/27 - ExecuSummit - Brian Allen		
February '2015											
Wk of 2/2	Industry perspective		2/4 WorkCompCentral - Abuse deterrent formulations (Matt Foster)			2/4 - Telemedicine to R&I article with Dr. Hall					2/3-2/4: ExecuSummit - Brian Allen The politics of Work Comp Proposals Due: National WC &
2/9				2/12 R&I FEB digital ad due: 17 Questions to Ask - Compounds		2/11 Future of Work Comp					
2/16								2/19 Pain management			2/19 Tampa CLM Chapter Meeting, Rafael
2/23				2/23 R&I FEB digital ad live 2/23 R&I March web banner due 2/23 R&I March digital ad due: AWP Inflation rate 2/26 Risk Management April Print ad due							2/26 Palm Beach Coast WCRI Seminar, Rafael
March '2015											
Wk of 3/2	DTR - 2015			3/1 Columbus CEO ad live 3/6 Leaders Edge April ad due					Columbus CEO award?	Columbus CEO announced	3/5 Boston CLM Chapter Meeting, Rafael
3/9				3/3 R&I March digital ad live 3/13 R&I April print ad due				3/10 TDIS Anti-ulcer/ Anti-emetic/ Laxative	3/12 - ABA - Jeff Gurtcheff		Proposal Due: PARMA 3/15
3/16			3/17 - Leader's Speak						3/19 - RISE - Gonzalez		3/19 - American Bar Assoc. - J. Gurtcheff
3/23			3-24 Leader's Speak	3/25 WCW email banner due				3/26 - UDT	3/26 - OSC - Dr. Hall		3/25-27; R. Gonzalez, RISE Nashville
3/30				3/31 Risk Management May print ad due 4/3 R&I April digital ad due: Body systems affected by chronic pain 4/1 Risk Management April Issue Ad Live					3/31 - National Rx		4/2 OSC - Dr. Hall

Communication Vehicles

- White Papers - in-depth paper on a topic/issue of industry concern, authored or co-authored by company SME. Technical and educational - not promotional. >1,500 word

- Position Papers - overview of company's position on a particular industry issue. 600-800 words

- Case Studies - a specific real situation used as an educational tool, that clearly demonstrates how our programs lead to successful outcomes. >800 word

- Press Releases - alerts that inform media of our expertise as exhibited in speaking engagements, white papers and new product releases, etc. Approx. 500 words

- Articles - interview appearing in media and/or byline article, which is a perspective on industry topic. May be pitched to media. 800 - 1,500 words max.

- Sponsored Content/advertising - combination of informative copy on industry topic/issue and promotion of our solution(s). Online Risk & Insurance 600 – 1,500 words max.

Communication Vehicles (cont'd)

- Video – less than 3 min long featuring industry issue/topic and SME; Sig Series video is in-depth topic discussions, typically with industry leaders, and > 5 min.

- Blog/Social Media - address industry topics. Will also appear on Twitter and LinkedIn. 300 words max.

- Info graphics - detail pertinent facts and reduce complexity of an industry issue or trend. May appear in multiple content vehicles.

- Speaking Engagements - SME presentation at an industry conference. Content may be resource for future assets.

- Webinar/Continuing Education (CE) - SME-led online presentation that delves into a particular topic, either for CE credit or general education.

Distribution Channels

- Our website and blog

- Risk Central

- Social Media

- Media

- Email

- Conference and webinar assets

- Industry publications

Inventory of Assets

► Current, past, and prospective thought leadership assets divided by line of business and aligned by key focus. Separated into vehicle type.

► Ensures we are creating materials that address the topics of industry interest.

► Allows for quick overview of what assets we have that can be repurposed and what areas need more focus.

Inventory of Assets

Thought Leadership Vehicle	White Paper	Case Study	Articles	Sponsored Content	Video	Blog/Social Media	Infographics	Webinar	Speaking Engagements	Resources
Pain Management	Medical Marijuana		How to talk to your doctor about pain	Body sys affected by chronic pain (Apr R&I)		Comorbidities	Med MJ map	CE Pain management	Painweek 2014 on UDM	Chronic pain presentation
	Insomnia and pain		Comorbidities (from blog posts)			acetaminophen	Pain Stats	CE TDIS Non-opioid analgesics	National Rx Abuse Summit – The Body Systems Affected by Chronic Pain and Opioid Analgesics	Pain management resource center on PMSI web
	Comorbidities		Leaders Speak – Matt Foster – Treatment Guidelines: 12/14			Brain injury awareness mo. (March)				Medication Cards (from National)
	Obesity and Age					Workplace EYE safety mo. (March)				
	Depression and Pain					Insomnia in chronic pain				
						Depression in chronic pain				
Opioids	NSAIDS			Medication Monitoring Achieves Better Outcomes (9/14)		Zohydro 1 yr later	Opioid Rules by state map	Bending the Curve of Opioid Misuse and Abuse	AAPPO – Evolving Opioid Policy at the State and National	
	MED (C1466)					Opioids	MED dosing	CE Fraud waste abuse part 1 opioids		
	Strategies to reduce opioid abuse (C1302)					My battle with opioids	UDM (see poster)	CE TDIS Opioids		
	Medication Agreements					MED				
	Collaboration curve the opioid trend (Peter Paper)									
Physician Dispensing	One year later					Map	How it works	Physician Dispensing and Compounded Meds – a legislative and reg update	Politics and the loopholes in Phys Dispensing (Brian Allen, IAIABC 2014)	Signature series; Summit videos
	PD overview						The Debate			
Compounds	Compounded meds		Leaders speak Brian Allen compounded meds (6/2/14)	17 Questions to ask (Feb R&I)		Compounded Meds		Physician Dispensing and Compounded Meds – a legislative and reg update		
	Pharmocogentics		Leaders speak 17 Questions					CE Compounded meds		
	Medical Foods									

Communication Editorial Board (CEB)

- Purpose
  - Allows us to advance our communications efforts to broaden our reach, target our messaging, and align the voices of our individual departments as one, strong brand.
  - Positions us to be proactive on rising topics and be ahead of the competition in bringing light and perspective to current trends.
  - Assists in aligning company-wide initiatives throughout all departments so we present a unified brand voice.
  - Engages SMEs in the communications process and positions them to educate and inform our target audience.

Steering Committee

- Purpose
  - Small group of executives to guide the CEB
- Role
  - Advise on topics for the company to address
  - Advise of SMEs to sit on CEB as consultative resources to help create materials used in communications initiatives
  - Help create agenda and run CEB meetings
  - Act as liaison between Marketing Communications and corporate departments
  - Provide ad-hoc advice on urgent or intermediate initiatives
  - Participate in quarterly meetings (in-person, conference call, or send designee)
    - First meeting December 2014
    - Quarterly, two weeks to one month prior to CEB meetings

Selecting Key Focus Areas

- Steering Committee will be tasked with selecting key focus areas for 2015
- Will answer questions such as:
    - What is our position on said issue?
    - What functional benefits do our products and services deliver?
    - What emotional benefits do our products and services deliver?
    - Why does this matter?
    - What evidence do we have to substantiate our claims?
    - Is this what our audience needs/expects from our brand?
    - Does this align with our brand goals and objectives?
    - Does this fit in with our defined voice and tone?
    - Are there potential negative outcomes of publishing/posting this content?

Selecting Key Focus Areas

▶ Relevancy

– Is this an important issue to the market at this particular time?

▶ Positioning

– What is our position on the topic?

▶ Execution

– Who can provide insight to this topic?

▶ Priority

– When should it be released?

▶ Good:

– Discussing a topic that is important to the industry

▶ Better:

– Discussing a topic that is important to the industry AND for which we have a **solution**

▶ Best:

– Discussing a topic that is important to the industry AND for which we have both a **solution and a substantiated claim (for example, a case study or testimonial)**

CEB Member Role

- Provide insight into the challenges and issues present or on the horizon in the area in which they are an expert on a regular basis, including new product releases, competitor product or service offerings, or any topic receiving attention in the industry

- Advise on topics to address and serve as a consultative resource to help create materials used in communications initiatives

- Act as a spokesperson as needed for media requests

- Post on social media on behalf of the company (per assignment)

- Participate in quarterly meetings per year (in-person, conference call, or send designee)
  - Proposed 2015: January, April, July, and October

Steering Committee Meeting Agenda

- January 8, 2015
  - Communications Editorial Board Overview
  - Content calendar
  - 2014 Completed
  - Review vehicles
  - Discuss 2015 Key issues
  - Discussion
    - Topic
    - Helios position
    - Best time to put on calendar
    - Who is SME

CEB Outcomes

- Based on information garnered from the Steering Committee and discussions with the CEB, Marketing will:
  - Determine best time to schedule topic on calendar
  - Create material with SME guidance
  - Publish
  - Repurpose for different vehicles
  - Share
  - Promote

Editorial Guidelines

- Communications team will create a document that outlines our editorial guidelines to assist SMEs with authoring any documents

- Guidelines will include
  - Brand messaging
  - Explanation of active versus passive voice
  - Word count guidelines for different vehicles
  - Grammatical, formatting, and technical preferences
  - List of proper products/services names and trademarks
  - Best practices based on vehicle (i.e., blog post include external links; headlines less than 115 characters, etc.)

Social Media

SOCIAL MEDIA

Summary

- A corporate blog, integrated in our new website, will be a major resource for distribution of content across our social media networks

- Key social networks include LinkedIn, Twitter, and SlideShare

- Facebook is recommended to be maintained for employee and recruiting purposes and will be managed by HR

Goals and Objectives

- Goals
  - To position Helios as a workers' compensation industry thought leader by delivering a regular stream of thought-provoking, in-depth commentary on key industry issues through active social media channels.
  - To broaden our reach to industry professionals and media

- Objectives
  - To complete a survey of our current contact list (from Sales Force) to gage social media interest
  - Set our 2015 measurable objectives for all social media post-survey
  - To launch a corporate blog by January 1, 2015
  - To launch Helios branded Twitter and LinkedIn accounts by January 1, 2015
  - To increase our participation on LinkedIn group through regular posts and comments by 20%, January 2015-December 2015

Corporate Blogging ... the Dilbert Way
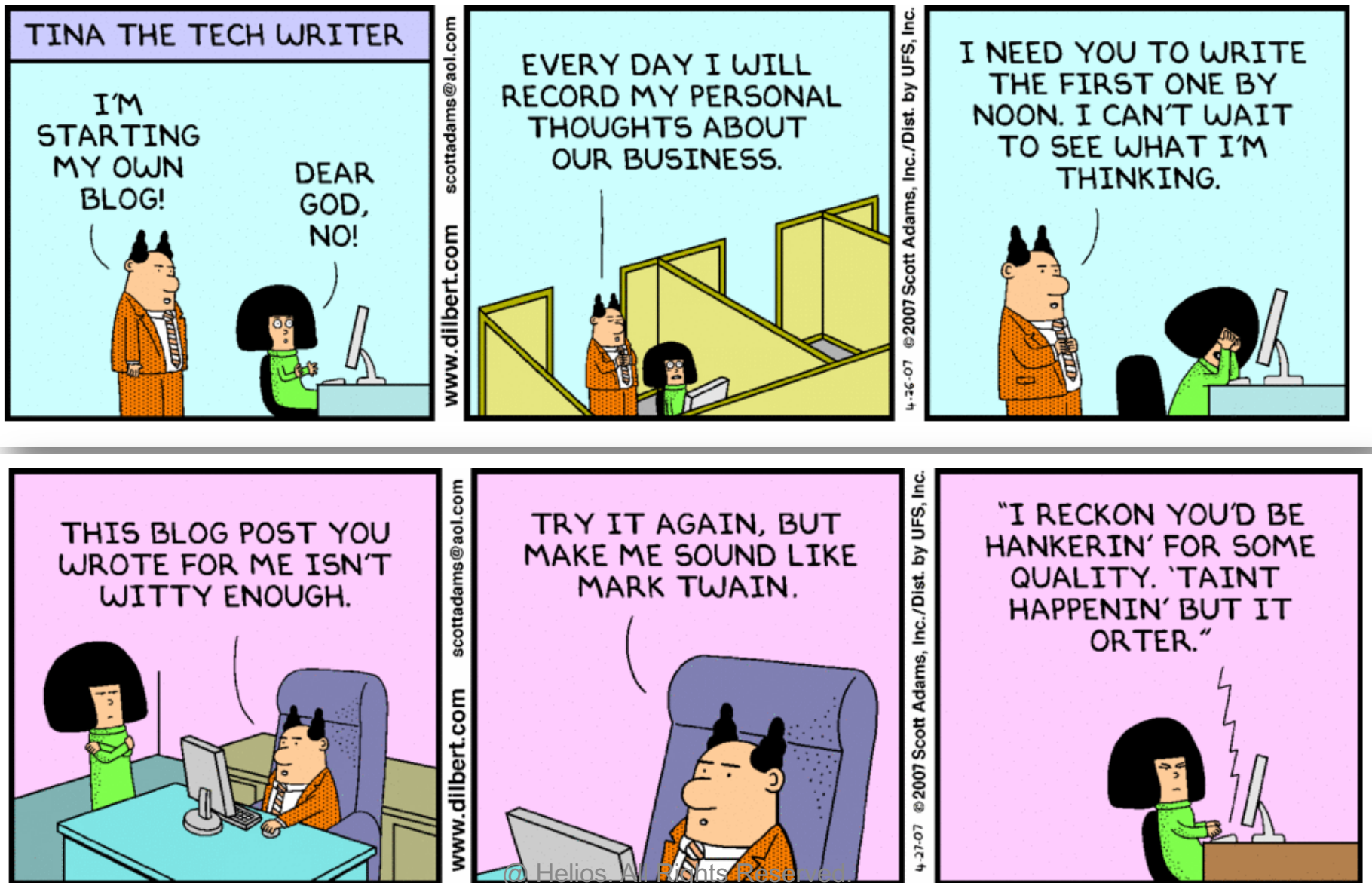
Corporate Blog

- Goals
  - To educate and inform
  - To increase distribution of thought leadership throughout the industry
  - To increase lead generation through blog subscriptions
- Audience
  - C-level executives, adjusters and supervisors, media
- Key Metrics
  - Number of Posts
  - Subscribers
  - Unique and return visitors
  - Social Shares
  - Media Mentions
  - Comments
- Current Status
  - MedicareInsights.com is an active blog addressing Settlement. It will remain on its own domain but the posts will be incorporated into the new blog.
  - MedicareInsights currently has about 5,700 subscribers. Over ¾ of which are returning visitors.

Corporate Blog Content

- Blog content will be a major resource for content across all social media channels
- Recommend graduated number of posts per month
  - First quarter 2015: 2 posts per month
  - Second quarter 2015: 3 posts per month
  - Third quarter 2015: weekly posts
  - Fourth quarter 2015: Minimum of one post per week
- 300 – 1,500 words
- Industry/thought leadership focus; Blog posts will be authored by SMEs identified by the CEB
- Keywords, tags, categories will be pre-defined
- Other acceptable types of content *beyond* the thought leadership include
  - Infographics
  - Video clips/podcasts
  - Alerts and/or updates
  - Press releases
  - Webinar announcements and speaking engagement review
  - White paper releases
  - Curated content from trusted industry resources
  - Guest blogs

Editorial and Post-Publication Process

- Editorial Process
  - Identify editorial board team members to author blog posts
  - Populate editorial calendar and inform SME of content and deadlines. Blog posts are due **one month prior** to actual publication date.
  - Alerts and updates will be on as-needed basis and do not "count" as fulfilling the once-a-week blog post
  - Marketing will assist SMEs as needed and be responsible for editing/writing/fact-checking, and uploading post to the blog, as well as adding proper keywords and tags to the post
- Post-Publication Process
  - Marketing will review comments with SME
  - Approve or decline comments
    - Action required within 24 hours
    - Inappropriate comments will be denied. Negative comments are permitted with appropriate response comment.

LinkedIn Company Page

- Goals
  - To build brand awareness within industry
  - Engage clients and prospective clients, media, employees
  - Recruit
- Audience
  - C-level executives, adjusters, supervisors, media, employees
- Key Metrics
  - Number of Posts
  - Comments and shares
  - Subscribers
- Current Status
  - Legacy PMI - 1,175 subscribers
  - Legacy PMSI - 3,144 subscribers

- Content:
  - Sync blog posts to automatically post to the LinkedIn company page
    - Thought leadership
    - Infographics
    - Video clips/podcasts
    - Alerts and/or updates
    - Press releases
    - Webinar announcements
    - White paper releases
    - Curate content from trusted industry resources
  - Open positions, job listings

Considerations

- There is no way to transfer followers from an existing company profile to a new one.

- The PMSI page was renamed to Progressive Medical/PMSI a few months ago with the dual logo.

- It is recommended to take this account and change it to Helios, and put notices on the legacy Progressive Medical LinkedIn company profile to follow us on the Helios page.

- Promote via email and on website to follow new Helios LinkedIn Company page.

LinkedIn Group: Work Comp Cost Mgmt

►Goals
- To engage industry professionals and media in relevant, topical discussions
- To provide a forum for company news to reach targeted audience of industry professionals

►Audience
- C-level executives, adjusters, supervisors

►Key Metrics
- Number of Posts
- Subscribers
- Comments and shares

►Current Status
- 2,061 members

►Content:
- Third-party posts
- Posts to generate discussion and participation. May want to build this off of a recent blog post, article, alerts, press release, or white paper.

Considerations

- The logo and main banner on this page needs to be updated but NOT to a Helios logo. It should be something generic so it is truly an industry group *(note: will be completed by 11/17/2014)*
- Review/approve member requests to join group weekly
  - Once join group, free to post
  - Check weekly to see if any posts need approval due to LinkedIn flags
  - Might need to update templates for welcome to group
  - Currently, owners are Jan Luongo and Colleen Stoker

Monitoring the Industry on LinkedIn

LinkedIn Groups: (1) Actively Monitor; (2) Passively Monitor; (3) Listen

Group Name		Owner	Focus	# members	Notes
Risk Managers	1	General	Risk Management	76,267	
Risk and Insurance Management Society (RIMS)	1	Association	Risk Management	42,877	
Work Comp Analysis Group	1	Mark Walls	Work Comp	24,233	"Largest online discussion group dedicated to exclusively to workers' compensation issues"
Workers Compensation Roundtable	1	Publication	Workcomp	12,889	Workerscompensation.com and AMAXX
WorkCompCentral	1	Publication	Work Comp	9,040	David DePaolo
Risk & Insurance	1	Publication	Risk management Work comp	6,994	
Business Insurance	1	Publication	Risk management	2,786	
Work Comp Cost Management	1	Helios	Work Comp	2,165	
CLM Alliance	2	Association	Settlement	9,279	claims and litigation management
California Workers Compensation & Risk Conference (CWC)	2	Conference	Work comp in Calif	2,927	
Workers Compensation Institute (WCI)	2	Conference	Work Comp	2,876	
Insurance Open Network	2	General	Insurance	2,695	
RIMS Annual Conference & Exhibition	2	Conference	Risk Management	635	
National Workers' Compensation and Disability Conference & Expo	2	Conference	Work Comp	573	
NAMSAP	2	Association	Settlement	450	National Alliance of Medicare Set-Aside Professionals
Workers Compensation Cost Containment Professional Network	3	General	Work Comp	5,577	QuestPro consultants?
Medicare and Medicaid Compliance	3	R. Gonzalez/Helios	Settlement	3,953	
Self Insurance Institute of America Inc (SIIA)	3	Association	Insurance	3,696	Membership still pending
Medicare Secondary Payer Compliance Forum	3	R. Gonzalez/Helios	Settlement	1,533	
Workers' Compensation Business Partners	3	General	Work comp	1,472	
Public Risk Management (PRIMA)	3	Association	Risk management	522	
Medicare Set Aside Allocations	3	R. Gonzalez/Helios	Settlement	295	
Medicare Mandatory Reporting	3	R. Gonzalez/Helios	Settlement	240	
Medicare Conditional Payments	3	R. Gonzalez/Helios	Settlement	193	
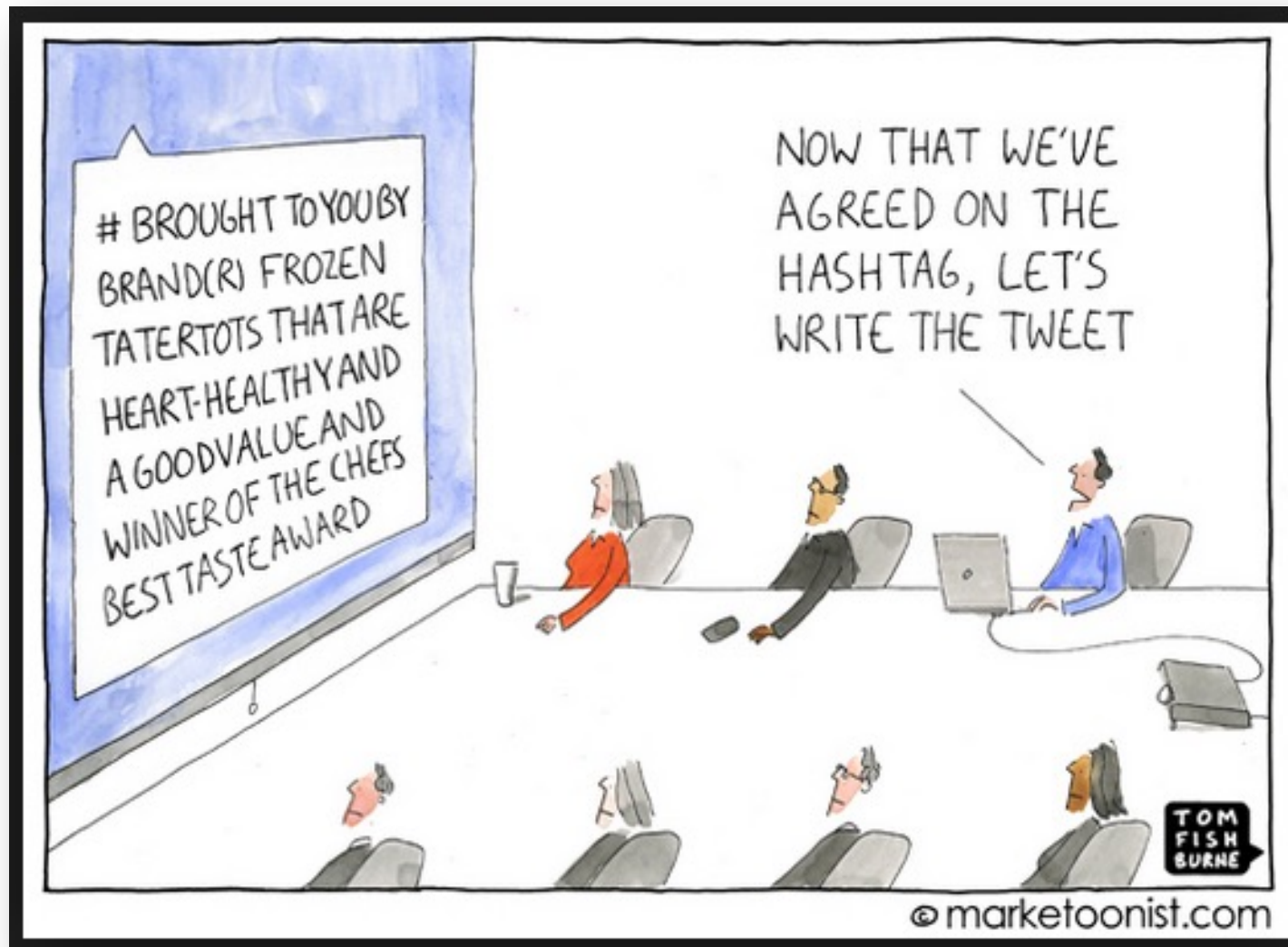
Twitter

- Goals
  - To build brand awareness within the industry
  - To increase thought leadership
  - To inform clients, prospective clients, and media
- Audience
  - C-level executives, adjusters, supervisors
- Key Metrics
  - Followers
  - Number of Tweets/Re-tweets
  - Mentions
  - Clicks to linked items
  - Media opportunities

▶ Current Status
  - @ProgMedical
    - 401 followers
    - 943 tweets (last tweet Dec '13)
  - @PMSIonline
   - 266 followers
    - 295 tweets (last tweet Jul '14)

Twitter Posting and Management

- Content
  - Weekly, 140-character "tweets" that tease blog posts and link to the blog
  - Other tweets may include
    - Real-time updates during events/conferences
    - Breaking news and/or alerts
    - Company news
    - Re-tweets of trusted industry resources
    - DTR facts
  - Use current hashtags (e.g. #WorkComp) in posts
  - General philosophy, tweet same item three times a day, worded differently to ensure tweets show up in our followers feeds
  - Always re-tweet FDA medication alerts which correspond to our own alerts
- Monitor and Respond
  - Check Twitter feed for topics that we should comment on and/or re-tweet

Considerations

- Twitter does not have the ability to transfer followers from one account to another. Legacy accounts will have to announce to followers to start following @HeliosComp.
    - Tweet three different announcements on both legacy accounts to follow @HeliosComp
    - Follow people each legacy account is currently following and/or who were following PMI and PMSI
    - Consider putting "The New Name for Progressive Medical and PMSI" in the name section of the Helios account for a brief time
    - Gradually tweet directly to people letting them know Helios is now following them, ex. "Helios, the new name for Progressive Medical and PMSI, is following you on our new Twitter @Broadspire1 @WCInsights @Paduda"
    - Actively use new Helios Twitter account
    - Blog about new Helios Twitter account
    - Publicize new Helios Twitter account in ads, press releases, etc.
    - Add new Helios Twitter account on website(s)
    - Include announcement about new Helios Twitter account in email alerts/updates/newsletters
- Need to update graphics *(will be complete by 11/17/2014)*
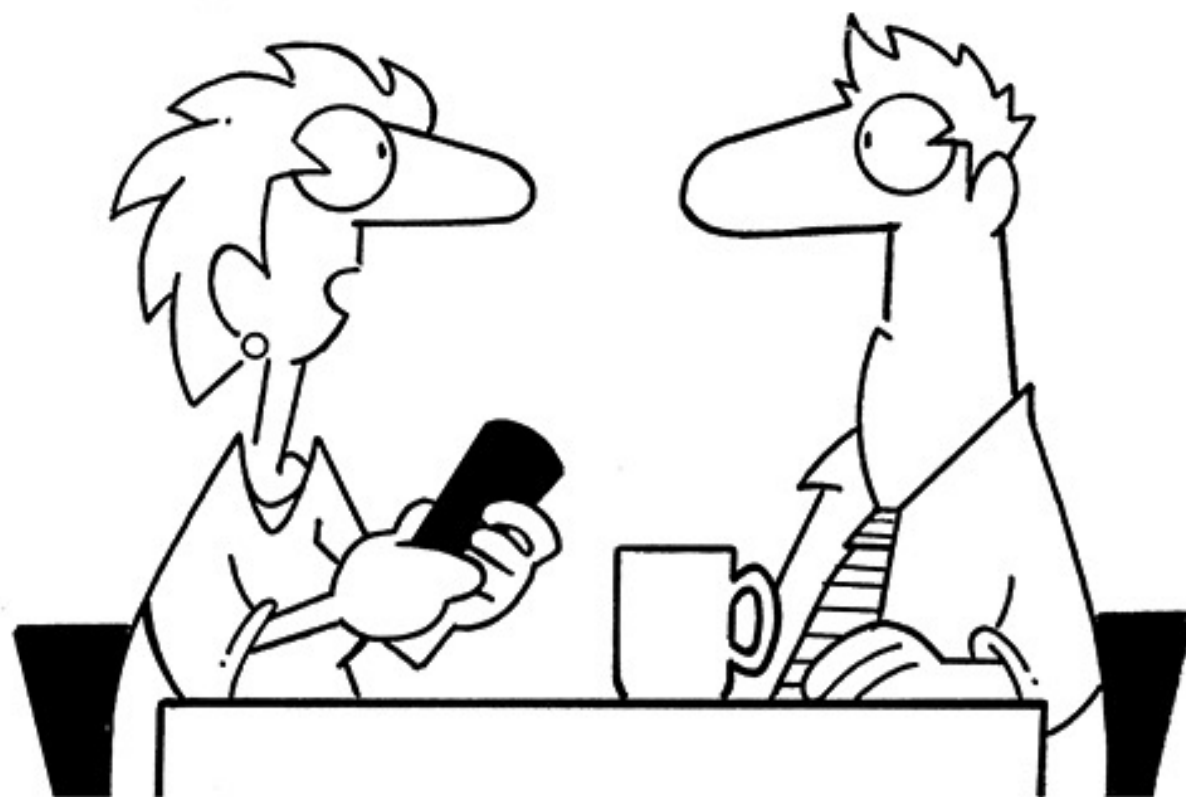
"If you want to hear my thoughts on that, check out my presentation on SlideShare."

SlideShare

▶ Goals
- To share knowledge and industry information by sharing presentations
- To broaden reach to new prospects with webinars and presentations
- To increase SEO through incoming and outgoing links
- To appear in search engines for relevant industry-related issues

▶ Audience
- C-level executives, adjusters, supervisors

▶ Key Metrics
- Presentation views, shares, likes, links from other sites, and leads generated (through contact form)

▶ Content
- Powerpoint presentations surrounding key issues
- Teasers for upcoming webinars or presentations

▶ Considerations
- Need to create a Helios SlideShare page with appropriate branding
- Need to copyright information
- Promote new presentations/infographics via blog and other social media
- Can set up so that presentations cannot be downloaded, but link to our website to view

The Value of SlideShare

- SlideShare is the world's largest professional content sharing community
  - 60 million unique visitors per month
  - 3 billion slide views a month or 1,140 slide views per second
  - Among the top 120 most-visited websites in the world
  - More than 15 million presentations/infographics/documents uploaded
- SlideShare offers another touch point
  - Like all social media, SlideShare offers another method for connecting with our audiences. While we would like to believe that our target audience knows to come to us for information, they may not and this offers another way to reach them.
  - Currently, we are limited to sending invitations to webinars to those who are in our contact list and subscribed to the topic area. SlideShare allows us to reach a broader audience of our target audience.
- SlideShare allows our presentations to live on and continually provide access to materials.
- SlideShare increases SEO for our website by providing links and automatically transcribes the text in our presentation, making it easy for search engines to find our content.

Our Use of SlideShare

- As a teaser for webinars, CE, or speaking engagements
  - Post a short, custom presentation (less than 10 slides) that introduces an upcoming webinar, CE, or speaking engagement and directs the viewer to register or attend the event for more information.
  - This will help us reach a broader audience and entice people to attend the event.

- Post-event summary
  - After a webinar, CE, or speaking engagement, we can provide a summary of the presentation on SlideShare and direct the viewer to our website for more information or to attend future events.
  - This will help us reach a broader audience, draw people to our website, and perhaps increase attendance for future events.

- Key topics
  - Create short, general presentations on key topic areas, such as physician dispensing or compounded medications, and direct viewers to our website for more information.
  - This will increase traffic to our website and increase reach on focus areas

Controlling Content on SlideShare

- We can prohibit people from downloading our presentations
  - While competitors would still be able to view our presentations, we cannot prevent them from attending the webinar or speaking engagement.
- Privacy settings
  - You can mark presentations as private and give a link with a password to only the people you want to be able to see the presentation, but this limits the audience that sees the presentation and inhibits the SEO functions.
  - After a certain date, you can make the presentation public. This would allow us to share presentations with webinar attendees or specific clients first and then later open it up to the public.
- Analytics
  - SlideShare provides analytics so you can track who is viewing your presentations.
  - If we find that competitors are viewing materials more than clients or potential clients, we can discontinue use.
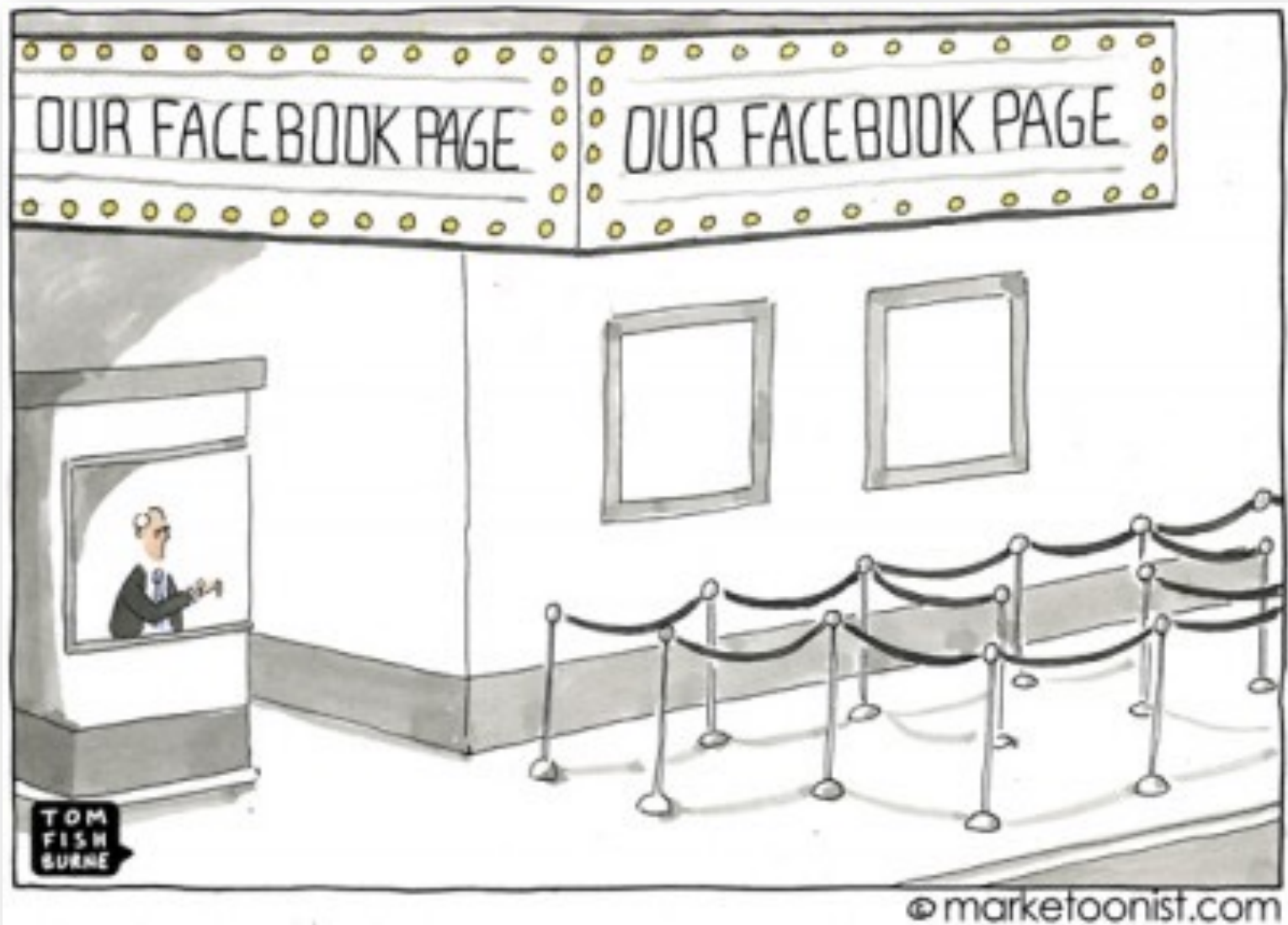
Facebook

▶ **Goal**
- To maintain brand visibility, philanthropic, culture and cause, employee relations/recognition, and team building by posting company and employee-related information and photos.

▶ **Audience**
- Employees and prospective employees

▶ **Key Metrics**
- Number of Likes
- Posts
- Comments
- Shares
- Clicks on linked items

▶ **Current Status**
- Progressive Medical - 89 followers
- Progressive Medical Careers page – 180 followers
- PMSI - 244 followers

▶ **Content**
- Philanthropic involvement (postings and photos)
- Company events (postings and photos)
- New hire welcomes
- Employee recognition (award winners, work anniversaries, etc.)
- Company campaigns or initiatives
- Helpful tips

Considerations

- Facebook allows you to combine our legacy pages into one
- Most employees do not want the company to see their Facebook profiles
- Facebook is not accessible at work; many won't check it at home
- After survey of contact list, we may find that Facebook would be a good forum for an adjuster-focused Facebook group or other additional use.
- Page will require re-branding *(will be complete by 11/17/2014)*

Key Activities and Resources Needed

- Blog – Corporate Communications team
  - Corporate Communications team write initial blog posts – due Nov 15
  - Identify SMEs of topics, due dates – due Dec. 5
- Graphic Design – *assets will be redesigned by 11/17/2014*
- Facebook – Marketing and HR
  - Combine legacy accounts
  - Joint management with HR and Marketing (SLC team primary)
- SlideShare – Marketing
  - Need to engage graphic design and/or Stephanie Weimer to assist in creating presentations
- How to automate postings to different social media – Corporate Communications

Managing and Monitoring

- We will utilize HootSuite for maintaining and monitoring our social networks
  - We can monitor all of our social networks within HootSuite
  - Be alerted when we are mentioned or someone comments on one of our posts
  - Assign tasks to SMEs or other members of Marketing team to respond to posts
  - Schedule posts in advance
  - View analytics for our social media sites

Posting Guidelines

- Policies
  - Broad policies on certain subjects will be drafted to use as guidelines for social media posts.

- Process
  - Marketing will identify opportunities for SME response/post based on trending topics and alert SME
  - SME will draft response and submit to Marketing for review
  - Upon approval, SME will post using their own profile in Twitter or LinkedIn
  - Certain SMEs will be identified who can post without Marketing review

Etiquette: the Basics of Sharing

- The purpose of social media is to create engagement.

- This is done by sharing information.
    - Post engaging content on a number of channels, such as those in our social media plan (blog, Linkedin, Twitter, SlideShare, Facebook)
    - Have others share your content. You can increase the reach of your content by having others share it as well. This is what ultimately allows content to go viral.*Note that a key metric for each of our social channels is "shares" or "re-tweets" in the case of Twitter
    - Share content of others
        - Sharing other people's content on social media increases your credibility. It shows that you are not just promoting yourself but also listening to the conversation. It also encourages those whose content you shared to reciprocate and share your content.
        - Because the goal is to share your content as widely as possible, people want you to share their content, it is encouraged and appreciated.

Sharing Appropriately

- **Re-tweeting** – If we see a tweet by an industry leader that we believe is of interest, we can re-tweet it. When you re-tweet, Twitter and/or Hootsuite automatically populates the correct etiquette, which is "RT @Handle: Message"

- **Social Shares** – If we see a post on another social channel by an industry leader that we would like to share, we can use the "social share" buttons to do so. When you select the button, it allows you to choose which social channel you would like to share the post on (Twitter, Facebook, LinkedIn, etc.) and pre-populates the posting in an appropriate manner to give credit to the source and alert them that someone has shared their content. We can share others content without using the social share buttons. The proper etiquette is to give credit to the source and ensure that they know you shared their content, which is done by including their Twitter handle or account name in the post.

- **Guest Blogs** – We can also ask industry leaders to write a guest blog article on our blog for us or we can write a blog about one of their blog posts, making sure we give credit to the original post. We can also ask a blogger if we can rerun their blog post on our blog, and again make sure we give the appropriate credit.

Public Relations

PUBLIC RELATIONS

"I'd love to show the world my human side... could you create one for me?"

Summary

- An active public relations campaign pushes awareness of our products, services, and expertise to the market. We will employ regular **press releases** to stay top of mind with key industry media, and initiate regular conversations with **media** regarding story ideas. We will also seek out industry and internal awards to further display our expertise in the marketplace and enhance employee/potential employee interest in our company.

- Working in concert with the Communications Editorial Board, we will position our releases and story ideas to align with corporate initiatives.

Goal and Objectives

- Goal
  - To dominate industry media to build awareness of the new company name and further position us as the undisputed lead company in workers' compensation and auto no-fault cost containment/specialty services
- Objectives (*final baseline numbers to be determined from Share of Voice research*).
  - To increase positive media coverage in industry publications by 20%, from a media equivalency of $36,000* to $43,200, for the period of January 1, 2015 – December 31, 2015.
  - To close the gap* in share of voice between our Company and Express Scripts, and widen the gap* between the next closest competitor and our company, as measured in media equivalency and number of bylines, features, mentions, quotes, and syndicated coverage.
  - Increase number of bylined articles in key industry publications from 10* to 12.
  - Increase number of media mentions in national publications, from 1* to 3.
  - Increase number of industry and national media coverage of the Drug Trend Report, from 5* to 8.

Press Releases

- Purpose
  - To consistently communicate our expertise, products and services, and corporate information in order to achieve media coverage
  - To generate media mentions, quotes by our SMEs, and bylined articles
- Potential topics
  - New product/service releases, updates, results
  - Clinical/Analytical study results
  - Speaking engagements (before and after) and webinar offerings
  - New white paper releases
  - Client wins/renewals
  - Corporate news such as executive changes/new hires, branding initiatives, etc.
  - Statements from SMEs regarding breaking news, other industry news as appropriate

Media Relations

- Purpose
  - To seek out editorial opportunities within key industry publications and in some instances, national publications, regarding our key focus areas, in order to generate positive media mentions, SME quotes, and/or bylines
  - To build/maintain a symbiotic relationship with industry media
  - To offer our industry expertise to the media in a proactive and helpful manner
- Tactics
  - Collect and review editorial calendars for target publications for potential opportunities
  - Monitor industry news for opportunities to comment on a current topic and pitch an interview with the appropriate SME
    - Example: CWCI releases new report on state fee schedule changes. Can pitch Brian Allen as an industry resource to talk about how these findings could impact work comp.
  - Monitor these publications for stories being covered (and by whom), and offer proactive follow-up story ideas

Target Publications, Contacts, and Editorial Calendar Highlights

- *AM Best – Best's Review*
  - Contact: Lynna Goch
  - March: predictive modeling; April: Claims Technology; June: Work Comp Trends; Oct: Auto
- *Business Insurance*
  - Contacts: Sheena Harrison; Stephanie Goldberg; Gavin Souter; Paul Bomberger
  - Editorial Calendar for 2015 not available yet
- *Claims Magazine*
  - Contact: Patricia Harman
  - March: Auto
  - May: Auto Claims & Liability; Work Comp
  - July: Settlement

Target Publications, Contacts, and Editorial Calendar Highlights

- *Claims Journal*
  - Contact: Andrea Ortega-Wells
  - Spring issue: Third party claims involving injury biomechanics
  - Summer issue: Work comp, bodily injury, work-related injuries; Also distributed at WCI conference
  - Fall issue: Auto injuries

- *Claims Management*
  - Contact: Bevrlee Lips
  - March: Work Comp Compounded medications
  - May: Work Comp Legal update on Medical Marijuana; Auto Claims and Severity
  - October: Structured Settlement Strategies; Trends in Auto Claims

- *National Underwriter*
  - Contact: Laura Toops
  - August: Work Comp

Target Publications, Contacts, and Editorial Calendar Highlights

- *Public Risk Magazine*
  - Contact: Jennifer Ackerman
  - Nov/Dec: Work Comp
- *Risk & Insurance*
  - Contacts: Roberto Ceniceros; Dan Reynolds
  - May: Work Comp feature
  - Sept 1: Work Comp feature
  - Oct 1/Oct 15/Nov: Work Comp feature
  - Dec: Pharmaceuticals
- *Risk Management*
  - Contact: Morgan O'Rourke
  - May: Predictive Modeling
  - November: Work Comp trends

Key Web and Blogger Contacts

- Workcompcentral.com
  - Contacts: David Dankwa, David DePaolo, Jim Sams, Peter Rousmaniere
- Workerscompensation.com
  - Bob Wilson
- WorkCompWire.com
  - Stephen Sullivan
- Bloggers
  - Joe Paduda

Awards

- Purpose
  - To be recognized by a third-party source for our products, services, people, or promotional efforts and increase our credibility
- Tactics
  - Utilize Vocus to research award opportunities
  - Create and maintain an awards database by category (i.e., industry, corporate, marketing, etc.) that allows us to prepare for annual awards with ample time
  - Engage CEB and other SMEs in identifying possible awards from organizations that they may be involved with

Criteria

- Is it a national or regional award? If it is a regional award, is it in an area we are targeting our services, have prospects or clients, or have an account manager?

- What are the categories?

- Who can apply?

- What are the criteria?

- Does the award presentation interfere with any other events we are already committed to?

- Have we applied for or received the award in the past?

- Are we a member of the association hosting the awards or affiliated with the organization hosting the awards?

- Is the award promoted?

- What obligations are entailed, i.e. travel to event?

- Have our competitors received the award before? If our competitors have received an award, who, when, and on what topics?

Previous Awards Won

- Industry
  - Business Insurance Innovation Award
  - Industry Innovator Award
  - PBMI Rx Benefit Innovation Award
  - CompLaude Award

- People
  - Business Women to Watch
  - Woman of the Year

- Public Relations/Marketing
  - PRISM
  - ADDY
  - Aster
- Company
  - Healthiest Employers

Press Kit

- Contains
  - About us
  - Key facts
  - History/timeline
  - Executive team bios
  - Products/services overview

- Electronic and available online via the website

Vocus and PR Web

- Vocus
  - Public relations software that provides a database of journalists; Can query the database to find journalists by beat covered, topic, publication, region, and many other criteria.
  - Allows sending the release from the software for white-list in-box results
  - Provides statistics on opens, clicks, and bounces
  - Allows us to search for media opportunities by keyword to find publications not in our usual distribution
  - Has media monitoring module to track our mentions and also that of our competitors

- PR Web
  - Integrated into the Vocus tool, PR Web distributes press releases to a national database of journalists and wire agencies.
  - Press releases sent via PR Web get pick up in many news feeds around the nation and in industry-specific sources.
  - Provides reports showing the media outlet that published the press release and it's equivalent media value.

Speaking Engagements

SPEAKING ENGAGEMENTS
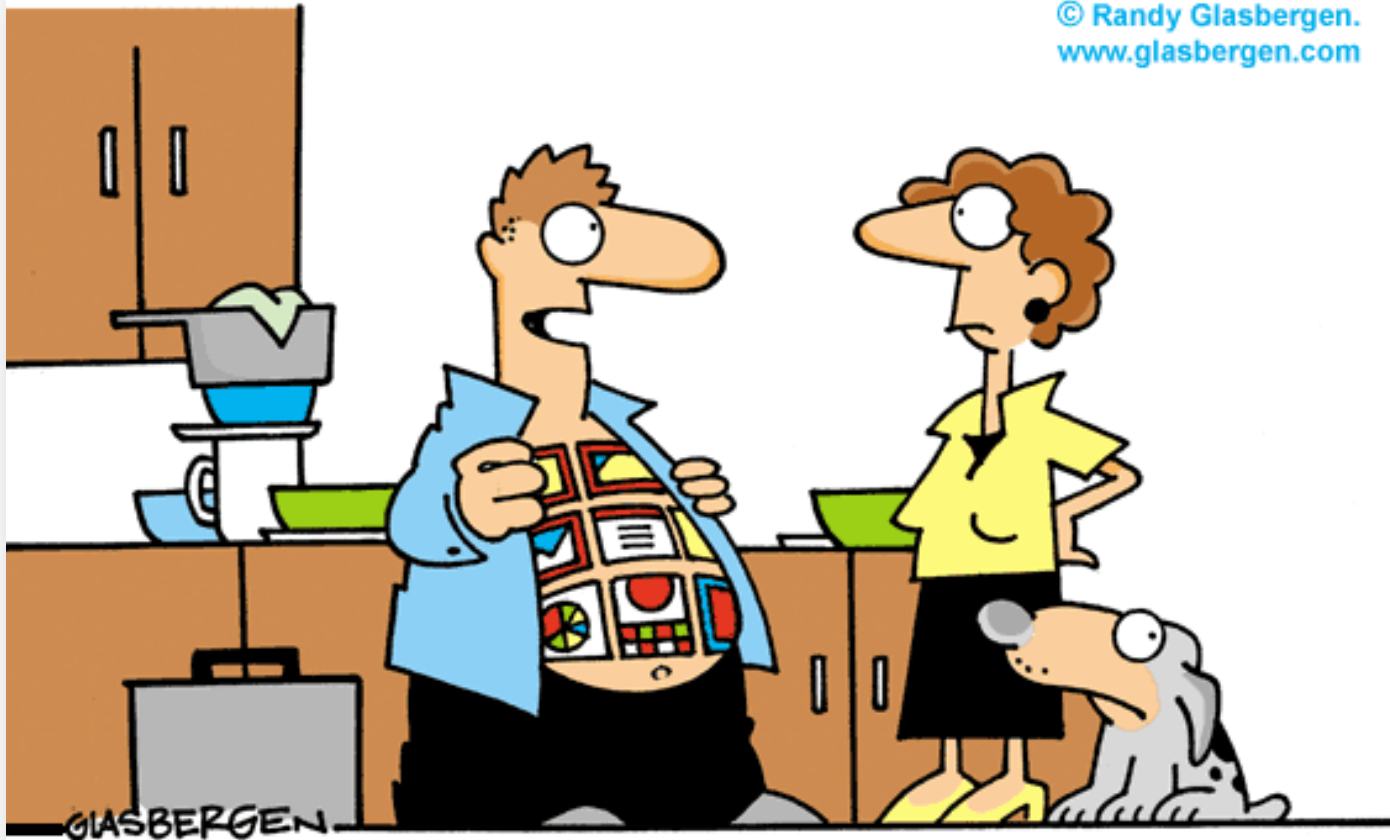
Summary

- A speaking engagement involves one or more of our SMEs presenting information/sharing insight via a presentation at an industry conference or other event.

- The SME may present individually or as part of a panel.

- We may choose to leverage the content to create other materials such as articles, infographics, and white papers that may also be used to promote the company's agenda or otherwise demonstrate leadership and expertise

Goal, Objectives, and Key Resources

- Goal
  - To broaden our reach and display our expertise through speaking engagements at key industry conferences

- Objectives
  - To have at least one speaking engagement every month
  - To have speaking engagements at all major conferences, including WCI and National
  - To create an online and print speakers bureau kit promoting the speakers we have available

- Key Resources
  - Colleen Stoker will manage the speaking proposal process
  - SMEs will be needed for speaking
  - Stephanie Weimer will manage the presentations
  - Jan will assist with promotion

Criteria

- Event Basics
  - Is this a national or regional event?
  - How many attendees?
  - When is the event?
  - Does the event coincide with other speaking engagements or major tradeshows in which our speakers already have a commitment?
  - What is the focus/theme of the event this year?
  - Have previous agendas and speakers aligned with our topics/presenters?

- Demographics and Location
  - Who attends the event? Are they our target demographic?
  - Is the event in a state in which we are targeting for our services?
  - Is it easy to travel to?
  - Do we have key prospects or clients in the region?
  - Do we have an account manager located in the region?

Additional Criteria

- Involvement (Past and Present)
  - Are we a member of the association/organization?
  - Are we a sponsor?
  - Have we spoke or exhibited there before? Did we find it valuable?
  - Are we involved in other meetings or events associated with the organization?
- Competitors
  - Have our competitors attended this event before?
  - If yes, who, when, and on what topics?
  - Were any of our competitors a sponsor in the past?

- Agenda and Selection Process
  - What are the desired topics the conference organizers/committee members seek for this year's event?
  - Does sponsorship weigh heavily in selection?
  - How extensive is the criteria?
  - Is this an ideal opportunity for a Tier 1 or Tier 2 speaker?
  - Is the event promoted, particularly speakers?
  - Do they offer an honorarium?
  - Is there an opportunity to pursue a keynote?
  - Should we pursue with clients?

Areas of Expertise

- Government Affairs
  - Politics of WC
  - Physician Dispensing
  - Medical Marijuana
  - Opioid Abuse
  - State-Specific Policies
- Clinical
  - Medication Trends
  - Compounded Medications
  - Opioid Misuse and Abuse
  - Early Intervention
  - Formularies & Medication Plans
  - Medical Guidelines

- Analytics
  - Medication Trends
  - Early Intervention
  - Predictive Analytics
- Settlement
  - SMART Act
 - MSA Compliance
  - Conditional Settlements

Speakers Bureau Kit

- Used to educate media, conference planners, and other stakeholders of our available expertise

- Contains
    - Speaker bios and photo
    - Sample listing of past speaking engagements for each speaker
    - Possible topics for each speaker
    - CEU schedule

- Available in both print and electronic formats, as well as on the website

Email Communications

EMAIL COMMUNICATIONS
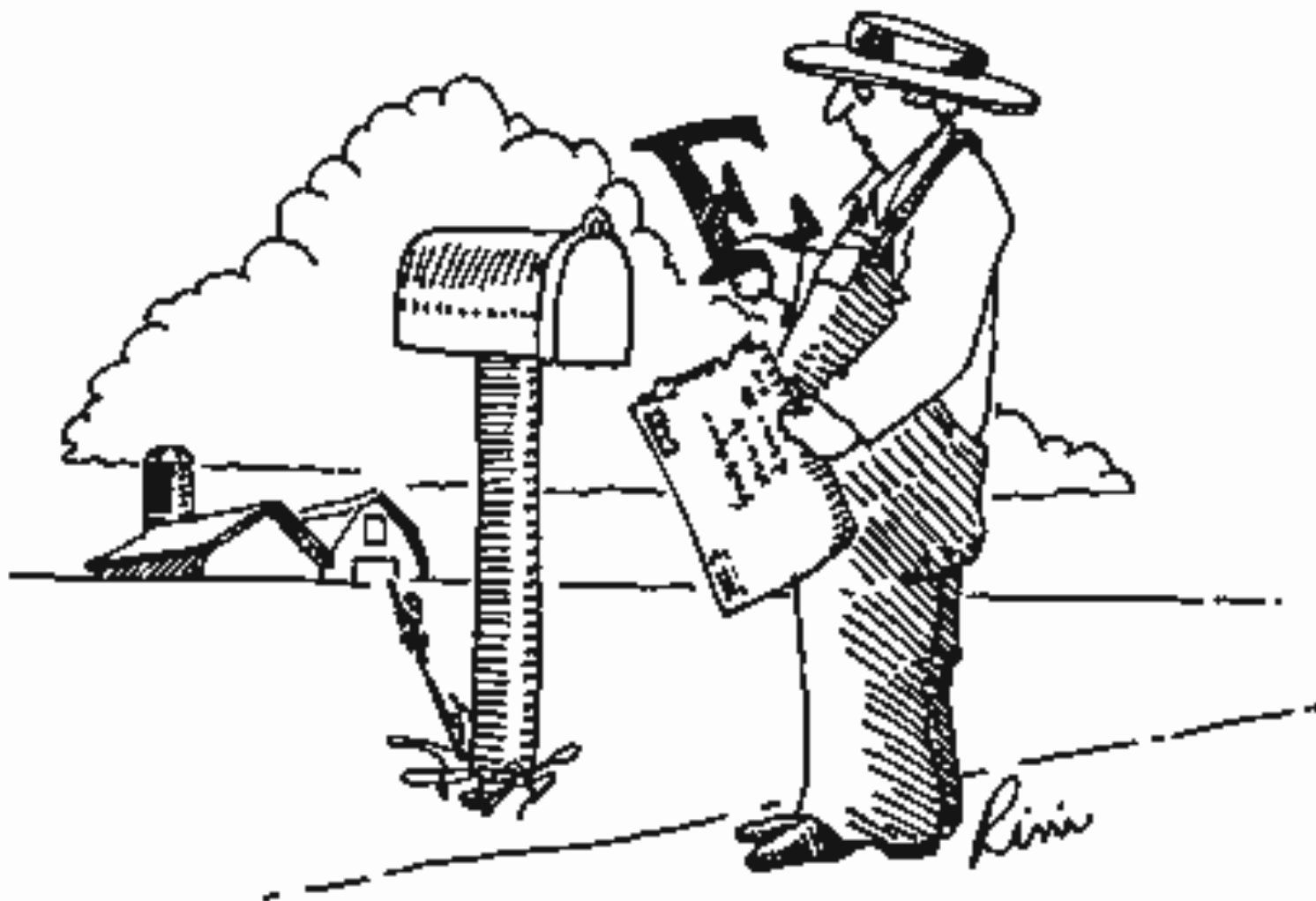
Summary

• Email communications keep our clients and prospective clients up-to-date on key topics of interest to them

• Those interested in receiving email communications subscribe to our mailing list via our website and select the topics of interest to them. Topic areas include:

- Government Affairs
- Clinical
- Settlement
- Ancillary
- Auto No-Fault
- Work Comp Industry

• Email communications are drafted and sent as determined by the CEB and key staff in the representative areas

Goals and Objectives

- Goals
  - To enhance our email communications process with clients and prospective clients in order to provide them with timely and relevant industry information on the topics they choose.
  - To position Helios as a workers' compensation and auto no-fault industry thought leader by delivering a regular stream of information on key industry issues.
  - To increase brand awareness.
- Objectives
  - To decrease our bounce rate from an average of 2.9% to 2% by June 30, 2015 with a goal to eventually have less than 1%
  - To increase open rates from an average of 13.4% to 15% by June 30, 2015 and 25% by December 31, 2016.
  - To increase click-through rates from an average of 1.25% to 2% by June 30, 2015 by adding more calls to action/options to click

Key Activities

- Send an email by January 12, 2015 to existing mailing lists asking recipients if they would like to continue to receive email communications from us and to select the topic areas of interest to them

- Send at least one email communication per month and more as needed

- Collect open, click through, bounce, and unsubscribe statistics for email communications at the end of each month

- Share bounce and unsubscribe statistics with sales and account management at the end of each quarter in order to help correct email issues and win back subscribers

- Send an email satisfaction survey to contacts every six months, starting July 1, 2015

- Utilize Salesforce and iContact

Opt-In Campaign

- By January 21, 2015, we will send an email to all existing contacts asking them to opt-in to future communications and choose the topic areas of interest to them (see email and form on following slides)

- The email will contain a link to a landing page on our new website that will have a form to complete to receive communications

- The form will automatically update records within Salesforce

Opt-In Email Text

We want to hear from you. How do you want to hear from us?

We're happy to have you as a subscriber to our communications. Our records indicate that you currently receive communications at this email address from Helios, the new name for Progressive Medical and PMSI. We're updating our systems to ensure that we continue to provide you with timely and relevant information that is of interest to you and in the format you would like to receive it.

Click here to let us know what topic areas are of interest to you. By filling out the brief form, you will continue to receive communications from us, including newsletters, medication alerts, whitepapers, and information about continuing education opportunities regarding the topic areas that are of interest to you. You can also let us know if you would like to communicate with us through social media or if you would like to use a different email address.

Be sure to fill out the form in order to continue to receive communications from us. With our system updates, if you do not complete the form, you will no longer receive communications from us, and we would hate to see you go. Thank you!

Link to form

Opt-in Form

Thank you for your interest in receiving communications from Helios. Please fill out the form below with your contact information. (*indicates mandatory fields)

First Name*
Last Name*
Company Name*
Email Address*
Title
Business Address
Business Address Line 2
City
State
Zip
Phone Number

Please indicate which topic areas are of interest to you (note you may select more than one topic):

•**Government Affairs** – Legislative and/or regulatory updates that impact the workers' compensation industry; for example, closed formularies, compounded medications, physician dispensing, medical marijuana, prescription drug monitoring programs, and more.

•**Clinical** – Medication recalls, medication trends, regulatory updates, and other medication-related information, such as medication approvals, generic launches, guideline changes, medication studies, continuing education opportunities, and more.

•**Settlement** – Legislative and regulatory updates and information related to Medicare Secondary Payer Act (MSP) compliance, such as conditional payments, Medicare Set-Aside (MSA), Mandatory Insurer Reporting (MIR), and updates from the Centers for Medicare and Medicaid Services (CMS), and more.

•**Ancillary** – News and information about ancillary products and services, including home health care, durable medical equipment, catastrophic care, and more.

•**Work Comp Industry/All of the Above** – Topics of concern and interest to the pharmaceutical and workers' compensation industries, including emerging trends, case studies, clinical studies, and industry thought leadership.

•**Auto No-Fault** – News and information related to the auto no-fault industry

Opt-In Email Confirmation

Thank you for subscribing to receive communications from Helios. You have subscribed to the following topic areas:

[topic 1]
[topic 2]
[topic 3]
[topic 4]
[topic 5]

We appreciate your interest and look forward to providing you with timely and relevant communications. To ensure receipt of future communications, please let your email provider know that you want to receive email from us by adding HeliosCommunications@HeliosComp.com to your address book. If you have any questions or comments, please feel free to contact us at HeliosCommunications@HeliosComp.com or [phone number].

"Didn't you get my e-mail?"

Bounce Process

- At the end of each month, a bounce list will be pulled from iContact for all communications sent that month

- The bounce list will be compared to the previous month's list

- Any obvious typos will be repaired (i.e., "…sedwick.com vs. sedgwick.com")

- If the same person is on the bounce list three months in a row, we will send their contact information and the diagnostic code information to account management leadership along with the template "Bounce Communication" (next slide)
  - Account management can use the "bounce communication" template to reach out to the contact to resolve the issue.
  - The contact should be on the bounce list three months in a row because sometimes it is a one-time occurrence and no action needs to be taken. Three months in a row indicates that there is an issue.
  - Account management may have information that the person is either no longer with the company or has a different email address.

Bounce Template

We appreciate your ongoing interest in receiving communications from us. It is important to us that you continue to receive the communications you subscribed to, but we're concerned that you have not been receiving them. If you haven't already done so, please let your email provider know that you want to receive email from us by adding HeliosCommunications@HeliosComp.com to your address book. If this does not solve the problem, you may wish to discuss this issue with your company's IT support. Please let us know if you have any questions or need any additional information.

Opt-Out Process

- At the end of each month, we will export the "unsubscribe" or opt-out report from iContact for each communication for that month

- Using Outlook, we will send the communication from "Opt Out Communication" template from the Helioscommunications@helioscomp.com email address to each person who opted out along with a link to the Opt-Out Survey

- We will send a list of who opted out to account management leadership with any survey feedback at the end of each quarter

Opt-Out Email Template

We have received your request to unsubscribe from all future communications from Helios. We are sorry to see you go.

If you are certain you do not wish to receive any communications from Helios, please take a moment to provide us with feedback. We are always looking to improve and value your opinion.

If this was done in error, please click here to re-subscribe to the topic areas of interest to you.

Thank you

Opt-Out Survey

We value your opinion. It is important to us to provide timely and relevant information of interest to the workers' compensation industry. We appreciate your feedback to help us improve future communications for our subscribers.

Reasons for Unsubscribing:

- I/my company does not utilize services offered by Helios
    - If you are receiving services from another PBM, ancillary, or settlement solutions provider, which company are you utilizing?
- I'm already receiving this information from another source
    - If you are already receiving information from another source, which source?
- The content is not relevant
    - If the content is not relevant, why not? Do you have suggestions for more relevant content?
- I've changed my position/company
- Other

Thank you again for your valuable feedback.

E-Communication Resources

- For our email communications, we utilize three software programs:
  - iContact is utilized for email creation and exporting email statistics. iContact is integrated with Salesforce and updates records accordingly
  - Salesforce is our contact management system, housing all records for our leads and contacts. Salesforce can be tied to Sitefinity, our website content management system
  - Sitefinity is utilized to create a form on the website for people to subscribe to our email communications. When they subscribe, it updates the record in Salesforce. All email communications will also be posted on the blog housed on our website through Sitefinity
- Marketing will work with SMEs to develop ideas and content for email communications

Corrections
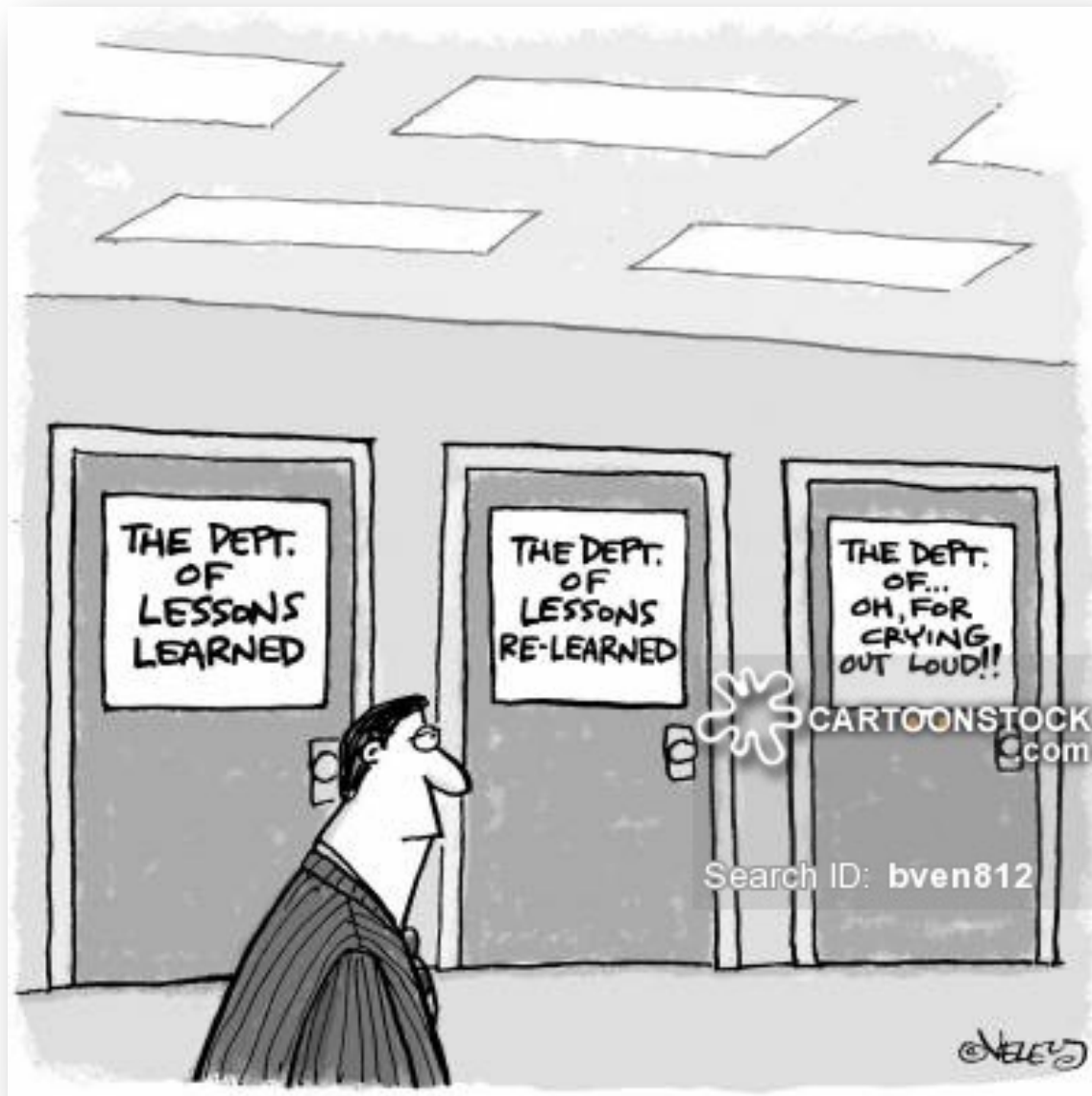
CORRECTIONS

Corrections

Should there be a mistake in any communication, regardless of vehicle

- In the event that a communication contains a mistake such as a typo, error, incorrect information, misquote, etc., we will issue an apology/correction in the same vehicle (i.e., email or blog/social media post) of the original communication.

- For example, if there was an error in a government affairs alert email that was sent to subscribers, we would send an email to the same list such as the following:
  - Subject line of email: CORRECTION: Government Affairs Alert Pennsylvania Passes Physician Dispensing Bill
  - You may notice an error in our recent Government Affairs Alert titled "Pennsylvania Passes Physician Dispensing Bill." We mistakenly put the effective date of the bill as August 1, 2014 and the correct date is September 1, 2014. Our apologies for any confusion this may have caused.
  - To read the correct version of the alert, click here. Thank you!

- For media errors, we will contact the publication and request a correction.

Website Plan

Summary

- The commercial website is an important strategic communication tool used by the company to influence how investors, employees (current and prospective), clients (current and prospective), competitors, and the public perceive our company. Essential for any modern business, a website should, at a minimum, act as an electronic billboard. It can be as simple as providing a virtual marketing brochure that can be updated for little to no cost and on demand. This type of website simply provides the basic company information, like products and services, to current and prospective customers. On the other end of the continuum is the ecommerce site that allows current and prospective customers to browse through a business' products and services, eventually choosing whether to purchase from the business, either online or at a brick and mortar store, if available.

- This section offers an overview of the website, its objectives, and our procedures surrounding its use, inclusive of key stakeholders with their associated responsibilities. Additionally, included herein are summary level details of future web development that will occur throughout the balance of 2014 and throughout 2015.

Objective

- Provide a satisfying online experience that provides customers, potential employees, business partners, and investors with a fast and easily accessible method for learning about our business, its products and/or its services in support of overall corporate and marketing objectives

- Foster brand loyalty

- Provide a vehicle to effectively advance thought leadership

- Drive engagement

- Recruit employees

Goals

- Smoothly transition web traffic to HeliosComp.com
- Successfully decommission legacy sites without harm to communication flow
- Continuous elevation of design and function
- Elevate content
- Establish baseline metrics in Q1 2015 and build from there

Reporting Metrics

- We report various metrics to Leadership on a monthly basis, one month in arrears, unless otherwise requested.

- Additionally, updates to the content calendar(s), Current Track, Basecamp, and any other tracking tools and reporting documents occurs regularly, for distribution to Leadership as appropriate.

- We anticipate that HeliosComp.com will have low numbers in terms of Visitors, high percentages of New Visits, Bounce Rate, and Exits. This is to be expected because it is a new and unfamiliar site.

- As visitors to www.progressive-medical.com www.pmsionline.com and other sites become aware of its existence, these numbers will improve. It will likely take six months to one year for the number of site visitors to www.helioscomp.com to equal the current numbers of www.progressive-medical.com and www.pmsionline.com combined.

Key Metrics

Visitors

- This is the number of people that visit our site during a specific timeframe (e.g., yesterday, last week, and last month). Unique visitors represent the count of individual people that visit our site regardless of the number of times they visited it. In layman's terms, if person A visits our site once and person B visits our site five times, we have two unique visitors and six total visits.

- This metric is important because it represents the size of the audience that we are reaching. As we expand our marketing efforts, we will want to see if they are effective. This is especially true when we do offline marketing that cannot be tracked explicitly in Google Analytics. So, if we run a magazine ad in October and don't see a corresponding jump in visitors during that month, perhaps that portion of our marketing budget could be better spent somewhere else.

- We will also need to pay attention to the trends in traffic over days and weeks, especially as they relate to these marketing campaigns. If we launch efforts to drive traffic and we see a spike, that is great feedback communicating the effectiveness of our strategies. The reverse is also true too. When we see an unusual dip in traffic, we might want to check things like our site's stability to ensure there were no outages.

Key Metrics

Repeat Visitors and New Visitors

- **Repeat visitors** is the number of people visiting our site once and then coming back again. A high or growing number of repeat visitors signals that our site is compelling and useful, or "sticky" in online marketing lingo. Sticky is good.

- Generally, the benchmark for repeat visits each day is usually around 15%.

- **New visits** show the portion of our total visit traffic attributed to unique views.

- This metric is a comparison of our unique visitors, versus those who are repeat visitors.

- If we have unusually high percentages of new visitors (above 30%), it may be an indication that our site is not sticky enough to warrant repeat traffic. We will clearly want to optimize and address this trend by highlighting our most valuable content so that we encourage people to come back. Likewise, if we see very few new visits (in the single digits), and we are doing significant marketing efforts to drive new traffic, we know other strategies are needed to meet our goals.

Key Metrics

Referrals

- Useful in helping us determine where the visitors came from.

- Referrals track users as they click on links in search engines, on other blogs, and other websites to our website. The referrals report will show the number of visitors we get from social sites as well.

- This is useful because knowing where our traffic is coming from is the key to understanding how the work we are doing to promote Helios is working. For example, are blogs mentioning us and linking back to our site?

- The referrals report is also useful to find other companies or blogs with whom we might consider forging a stronger relationship. For example, if we get traffic from a specific site, we might want to consider reaching out to them to establish a more formal relationship.

Key Metrics

Bounce Rate

- A "bounce" is when someone visits our site and immediately clicks the back button or closes their browser tab.

- What this usually means is that that user did not find what they were looking for on our site and decided to leave. Think of a person walking in the front door of a store, quickly looking around, and leaving immediately.

- Sometimes people end up on the wrong site by accident, so getting a bounce rate down to zero is impossible. Reducing the rate, however, is critical. Every lost visitor is a lost opportunity, so we will want to figure out why people are leaving and try to adjust content or navigation to keep users around.

- If we combine the referral report with bounce rate data (Google Analytics does this for us) we will be able to see what pages are generating the highest bounce rate. This insight will further allow site adjustments to enhance relevance and experience.

Key Metrics

Exit Pages

- It is easy to confuse "bounce" and "exit," but they are very different metrics.

- Unlike a "bounce", when a user visits our site and barely views one page, an "exit" is when a user visits multiple pages and then leaves our site.

  - Some pages naturally have a high exit rate, such as the "Contact Us" page. After all, a visitor is probably done once they know whom to contact to receive help with their issue.

  - However, having a high exit rate on other pages on our site may indicate that we have problems.

- We will need to look at our pages that have high exit rates and try to determine why a higher number of people than average are leaving our site from that page. Are they not finding the information they need? Why are they choosing to leave?

Key Metrics

Conversion Rate

- Of all the metrics we might track, conversion rate may be one of the most important, and also the most challenging.

- Conversion rate is the percentage of people who achieved a goal on our site. For example, completing a purchase, filling out a contact form, or viewing a certain page.

- The reason conversion rate is so important is that it is the ultimate measure of how successful our site is.
  - If we have a low conversion rate, we are attracting the wrong kind of visitor or our site is not effective at convincing visitors that we offer the right solution to their problem.
  - Monitoring conversion rate can also tell us if something is broken on our site. For example, if our conversion rate suddenly drops, that might mean that there is a problem with our sign-up form.

Key Metrics

Top 10 Most Visited Pages

- It is important to know what pages our visitors think are the most important on our site. By viewing our Top Ten Pages Report, we know which pages to focus on for the greatest impact as we look to improve our site.

- Because we run an informational site, our top ten pages report may not change significantly. In this case, the report will tell us what types of content our visitors find most useful and engaging, and which headlines we have written were the most successful.

- We will use this knowledge to help determine what kind of content to create as we move forward with growing our site.

Specimen Web Metrics Monthly Report

Strategies – Web Metrics for November 16-December 1

	Current Monthly Google Analytics for heliocomp.com	Current Monthly Google Analytics for progressive-medical.com	Current Monthly Google Analytics for pmsionline.com
Total Visits	797	6341	3197
New Visitors	524 (65.7%)	6039 (92.1%)	2479 (68.1%)
Referrals	1. Direct/none 2. Google 3. Bing 4. Yahoo 5. Linkedin 6. Prweb.com 7. Wcconference.com 8. Progressive-medical.com 9. Pmsionline.com 10. Z1.zedo.com	1. Direct/none 2. Google 3. Script-wise.com 4. Bing 5. Yahoo 6. Herecomessun.com 7. Opacprod01.pmi.corp:6880 8. Semalt.semalt.com 9. M.facebook.com 10. Opacprod01:7070	1. Google 2. Direct/None 3. Semalt.semalt.com 4. Bing 5. Tmesys 6. Pmsionline.com 7. Buttons-for-website.com 8. Yahoo 9. Helioscomp.com 10. Herecomessun.com
Bounce Rate	43.66%	16.75%	56.83%
Top 10 Exit Pages	1. www.helioscomp.com/ 2. www.helioscomp.com/about-us/careers 3. www.helioscomp.com/home 4. www.helioscomp.com/contact 5. www.helioscomp.com/about-us/leadership 6. www.helioscomp.com/solutions 7. www.helioscomp.com/about-us 8. www.helioscomp.com/about-us/careers/who-we-hire 9. www.helioscomp.com/about-us/history 1. www.helioscomp.com/solutions/workers-compensation/ancillary-services	1. www.progressive-medical.com/contactus.aspx 2. www.progressive-medical.com/ 3. www.progressive-medical.com/scriptwisepharmacy.aspx 4. www.progressive-medical.com/workerscompensation.aspx 5. www.progressive-medical.com/providers.aspx 6. www.progressive-medical.com/workerscompensation/toolsresources/medicationlookup.aspx 7. www.progressive-medical.com/ourcompany.aspx 8. www.progressive-medical.com/ourcompany/aboutus.aspx 9. www.progressive-medical.com/autonofaultpip.aspx 10. www.progressive-medical.com/workerscompensation/workerscompcostmanagementsolutions/ancillaryservices/transportationlanguageservices.aspx	1. www.pmsionline.com/index.aspx 2. www.pmsionline.com/careers/job-search.aspx 3. www.pmsionline.com/contact 4. www.pmsionline.com/pharmacy-center 5. www.pmsionline.com/settlement-solutions.aspx 6. www.pmsionline.com/pmsi/ 7. www.pmsionline.com/pharmacy-center/mail-order-faq 8. www.pmsionline.com/index 9. www.pmsionline.com/careers 10. www.pmsionline.com/

Specimen Web Metrics Monthly Report (cont'd

Strategies – Web Metrics for November 16-December1

	Current Monthly Google Analytics for helioscomp.com	Current Monthly Google Analytics for progressive-medical.com	Current Monthly Google Analytics for pmsionline.com
Conversion Rate	Conversion rate cannot currently be measured because goals have not been established for www.helioscomp.com	Conversion rate cannot currently be measured because goals have not been established for www.progressive-medical.com	Conversion rate cannot currently be measured because goals have not been established for www.pmsionlline.com
Top 10 Most Visited Pages	1. www.helioscomp.com 2. www.helioscomp.com/ 3. www.helioscomp.com/about-us/careers 4. www.helioscomp.com/insights/blog/newco-blog/2014/11/20/new-york-adopts-new-non-acute-pain-treatment-guidelines 5. www.helioscomp.com/solutions 6. www.helioscomp.com/subscribe-success/Action/Edit 7. www.helioscomp.com/about-us/leadership/emry-sisson 8. www.helioscomp.com/blog/-in-BlogAuthors/blog-authors/Settlement-Solutions?author=Settlement+Solutions 9. www.helioscomp.com/insights 10. www.helioscomp.com/insights/blog	1. www.progressive-medical.com/ 2. www.progressive-medical.com/contactus.aspx 3. www.progressive-medical.com/scriptwisepharmacy.aspx 4. www.progressive-medical.com/workerscompensation.aspx 5. www.progressive-medical.com/ourcompany.aspx 6. www.progressive-medical.com/ourcompany/aboutus.aspx 7. www.progressive-medical.com/providers.aspx 8. www.progressive-medical.com/workerscompensation/toolsresources/medicationlookup.aspx 9. www.progressive-medical.com/autonofaultpip.aspx 10. www.progressive-medical.com/workerscompensation/toolsresources/pharmacylookup.aspx	1. www.pmsionlline.com/index.aspx 2. www.pmsionline.com/careers/job-search.aspx 3. www.pmsionline.com/careers 4. www.pmsionline.com/pharmacy-center 5. www.pmsionline.com/contact 6. www.pmsionline.com/index 7. www.pmsionline.com/settlement-solutions.aspx 8. www.pmsionline.com/what-makes-us-different 9. www.pmsionline.com/pmsi/ 10. www.pmsionline.com/capabilities

Website Management

- Website management is necessary for the creation, management and delivery of information (content and documents), via corporate websites, portals, extranets or intranets.

- Content Management Systems are used for corporate websites, secure extranets for trading partners or online communities and intranets.

- The basic roles of a CMS include a content creator, reviewer and a publisher. This user security level enables the editor and reviewer to manage content via a web browser with the content stored in a database.

- In it's simplest form, the CMS (using a browser) will allow a content creator to use an editor to create and edit content with an authorized user to approve the content to be published in a live environment. All of this interaction is controlled through security, workflow and audit trails and all of this is stored and tracked in a database.

Decommissioning Legacy Sites

- The new website went live November 16, 2014. The legacy websites, including www.progressive-medical.com , www.pmsionline.com , www.firstfilltosettlement.com and www.herecomessun.com should all remain active for a minimum of six months following the go-live.

- This six-month window will allow visitors to the legacy sites to familiarize themselves with the new website, finding all tools and information they need, prior to decommissioning of the legacy sites.

- While the legacy sites will continue to have consistent traffic, that traffic will gradually shift to www.helioscomp.com as site visitors are directed there through banners on the legacy sites, as well as updated text in outgoing email and marketing materials.

Active Legacy Websites

Web Asset	Purpose Served
https://reporting9.pmsionline.com/microstrategy/asp/main.aspx	Reporting login. Currently in use on a daily basis by Account Management.
http://www2.pmsionline.com/PMSI_CE//CET_Start.aspx	Continuing Education Registration. Continued use required.
https://vitalpoint.pmsionline.com/Pages/Login/LoginPage.aspx?ReturnUrl=%2fsettlementsolutions___	Vital Point – Settlement Login
http://myclaimskit.com/	Claims focused informational site
http://www.pmsihealthier.com/	Workers' Compensation cost containment informational site – Healthier campaign (Delete)
http://pmsivision.com/	Workers' Compensation cost containment informational site – Vision campaign (Delete)
http://www.uspswcpharmacy.com/	USPS Workers' Compensation Pharmacy Program. Continued use required.
http://medicareinsights.com/	Settlement Solutions blog. Continued use required.
https://medicareconnectdemo.pmsionline.com/	Medicare Connect Login Demo

Active Legacy Websites (cont'd)

Web Asset	Purpose Served
https://mcdemosftp.pmsionline.com/	MOVEit DMZ Secure File Transfer Login Demo
https://mcsftp.pmsionline.com/	MOVEit DMZ Secure File Transfer Login
https://medicareconnect.pmsionline.com/	Medicare Connect Login (Continued Use Required)
http://clinicalservicesdtm.pmsionline.com/Pages/Common/NotAuthorized.aspx	Clinical Services Drug Testing and Monitoring Application – No Access
http://clinicalservices.pmsionline.com/NoAccess.aspx	Clinical Services Medication Review – Not Authorized
http://clinicalservicescpm.pmsionline.com/	Clinical Services Clinical Progress Monitoring Intervention – Not Authorized
http://marketing.pmsionline.com/store/	Dead link
http://medicareconnectdpi.pmsionline.com/	Dead link
http://www.claimyourimpact.com/	Claim Your Impact campaign (Redirect ticket submitted. Decommission immediately)
http://www.theworkcompresource.com	Redirect ticket submitted. Decommission immediately.

Decommissioning Plan

- Progressive-Medical.com

- PMSIonline.com

- ClaimYourImpact.com

- MyWorkCompResource.com (SignatureSeries)

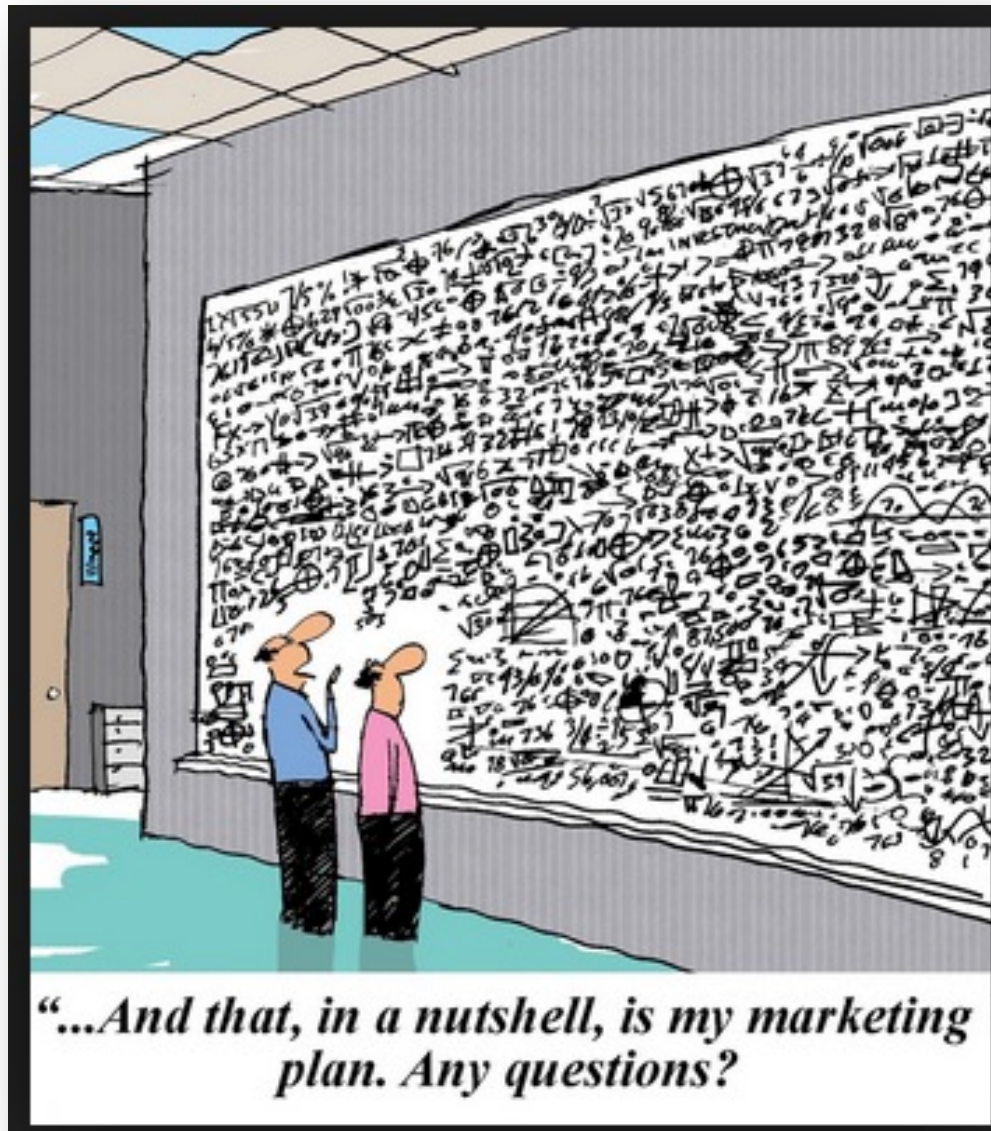- MedicareInsights.com

- AutoMedSolutions.com

Website Enhancements Q1 2015

- Robots.txt - Web site owners use the /robots.txt file to give instructions about their site to web robots; this is called The Robots Exclusion Protocol. (Action for IT)

- Sitemap – An [XML](#) [site](#) [map](#), which effectively provides an easy-to-read link dump for the spiders to index. Although certain Web browsers can display an XML site map for users to read as well, you should offer both kinds of site maps (HTML and XML) if you want to be sure to cover both the search engines and your users. (Action for IT)

- Meta Description on each page - Meta description tags, while not important to search engine rankings, are extremely important in gaining user click-through from SERPs. These short paragraphs are a webmaster's opportunity to advertise content to searchers and to let them know exactly whether the given page contains the information they're looking for. (In process)

- Minify CSS – Compresses CSS (some are large files) allowing for faster page loads. (Action for IT)

Website Enhancements Q1 2015

- Minify JavaScript - [Compiler](#) compiles JavaScript into compact, high-performance code. (Action for IT)

- Defer parsing of java scripts - In order to load a page, the browser must parse the contents of all <script> tags, which adds additional time to the page load. By minimizing the amount of JavaScript needed to render the page, and deferring parsing of unneeded JavaScript until it needs to be executed, you can reduce the initial load time of your page. (Action for IT)

- Utilize Brightcove online video platform to gather analytics for videos posted on the website

- Consider upgrading to Sitefinity Version 7 at some point in the future, however this is not currently necessary, as Version 6.3.5 will be supported for the foreseeable future

"...And that, in a nutshell, is my marketing plan. Any questions?

Appendix

Brand Messaging Matrix

	Message				GUT CHECK
FOCUS	Customer Relationships	Operational Excellence	Analytics	Advocacy	*Is the message focused?*
BRAND PILLAR	Our passion to provide superior customer service and account management and our promise to always be accountable.	Our creativity and vision that results in innovations that drive down costs before they go to settlement and ensure the right decisions are made at the right time.	Our commitment to being proactive – getting our customers ahead of trends and in front of potentially negative behaviors before it impacts their business, and the injured.	Our advocacy for a better industry.	*Does it deliver on our brand promise?*

Functional Benefits	Access
	Convenience
	Resource Management
	  - Time
	  - Capital
	  - Human
		Business Efficiencies
		Cost Savings
		Risk-mitigation
		Improved outcomes:
		-clinical
		-financial
		-time to closure (settlement, return to work, return to function)
		Complete view of the pharmacy claim
				Representation
				Knowledge
				Compliance
				Education
				Voice
					Are the appropriate functional benefits addressed?

Emotional Benefits	Accountability Approachable Attentive Authentic Caring Collaboration Friendly Honest Human-to-human Humility Importance Inclusion Informed Integrity Optimism Pride Professional Reliability Respect Trust Warmth	Cohesion Confidence Creativity Determined Effectiveness Efficient Fair Freedom Imaginative Improvement Peace-of-mind Strategic Tenacity Vibrant Virtuous Vision	Awareness Clarity Commitment Deliberate Determination Energy Excellence Expertise Focus Ground-Breaking Innovative Insightful Intelligence Powerful Responsible Smart	Authority Central Connected Dynamic Empowerment Enlightenment Influence Involved Leading Pacesetting Passionate Proactive Representation Responsible Strong	*Are the appropriate emotional concepts conveyed?*

Brand Messaging Matrix (cont'd)

EXAMPLES					
Focus	**Customer Relationships**	**Operational Excellence**	**Analytics**	**Advocacy**	*GUT CHECK*
Correct use of phrases	We don't work with companies. We work with people.	We're always looking for the next bright idea. If there's something new under the sun, we'll find it.	We made our name with great solutions. We've kept it with better ones. At Helios, a brilliant insight is a good start.	We wear our passion on our sleeve.	*Does the copy:* - *Reinforce both the emotional and functional benefits of the key message?* - *Reinforce the appropriate brand pillar message?*
Correct use of the word right	Right here Right when you need us Right on time	At the right time At the right price The right process	Right decisions Right treatment Right financial decisions	Right there Right knowledge Right procedures	- *Clearly show how we are "doing things right?"*
Correct use of sun analogies	Think of us as your knights in shining armor. The sun never sets at Helios. A sunny hello is just the beginning We'd love to brighten your day	See PBM in a whole new light Lighting the way forward	Bright lights, big ideas Making your business shine Shining light on ...	We're blazing a path to better PBM.	- *Are you utilizing a clearly defined content structure that drills down from big idea (key message) to detail (product)?* - *Are you speaking directly to the reader (using "we", "you", "us", "our") vs. Helios in the third person?* - *Have you overused a word, such as right?*
Sunny Words	ablaze, aglow, alive, beacon, blazing, bold, bright, bright spot, brilliant, central, certain, clarify, clear, crystallize, consistent, constant, continuous, curative, curing, dependable, energetic, energy, enlighten, essential, fueled, fuels, gallant, gleaming, glimmer, glint, glistening, glowing, golden, guiding, healing, highlighting, hopeful, ignite, illuminate, intelligent, lasting, light, lively, luminous, navigating, nurturing, polished, radiant, radiate, reliable, rejuvenating, reveal, revealing, safe, secure, shed light on, shimmer, shimmering, shine light on, shining, shiny, simplify, solid, sound, spark, sparkling, spotlight, steady, strength, strong, sunshine, sunny, support, sustaining, sustainable, therapeutic, warm, warming, unfailing, unwavering, vibrant, vigor, vitality, vivid				- *Have you overused the sun analogy?* - *Have you used words that sound great but are vague?* - *Do your words favor active*

Brand Messaging Matrix (cont'd)

Active Tense	Active voice describes a sentence where the subject performs the action stated by the verb Harry sold six wheelchairs at the conference. The critic wrote a scathing review. The staff is required to watch a safety video every year. She faxed her application for a new job. The department increased sales.	Passive voice sentences are written such that the subject is acted upon by the verb At the conference, six wheelchairs were sold by Harry. A scathing review was written by the critic. A safety video will be watched by the staff every year. The application for a new job was faxed by her. Sales were increased by the department.	- Do your words favor active vs. passive tense? - Are we appropriately taking credit for what we do vs. what we will do? - Are you being appropriately formal? - Are the words used evocative and energetic? Appropriately light?
Words with a positive orientation	Instead of These… Concern, issue, problem Difficult, demanding Dismal Always, never Ineffective Mistakes Should have Bad Faults	Consider Using These (where appropriate) Situation, topic of interest, matter, element, question, source, origin, option, influence Ambitious, challenge, complicated, requires effort, unyielding Not as bright, needs encouragement, less than favorable, somber, murky, discouraging Often, don't often, seldom, consistently, regularly, quite often, rarely, at times, sometimes Unproven, questionable Valuable lessons, opportunities Could have Unwise Differences	- Wherever possible, are we talking in an appropriate, balanced, and positive manner? Is an effort being made to not present a punitive message?

Corporate Social Media Policy

- **Purpose:** Establish guidelines governing Associate use of social media that may conflict with the interests of the Company.

- **Scope:** This Policy applies to all Helios Associates and businesses.

- **Policy Statement:** Social media (including personal and professional websites, blogs, chat rooms and bulletin boards; social networks, such as facebook, linkedln, twitter and myspace; video-sharing sites such as youtube; texting and email) are a common means of communication and self-expression. Because online postings can conflict with the interests of Helios and its customers, the company has adopted the following policy. Breach of this policy may result in counseling and disciplinary action, including termination of employment.

  This policy is not intended to prohibit, discourage, or otherwise impede communications protected by any applicable state or federal law, including but not limited to an Associate's communications regarding the terms and conditions of their employment with the company.

- **Confidentiality and Privacy**: Associates should not disclose or refer to the Company's confidential or proprietary information, or personal identifying information of anyone at the Company, in online postings or publications. Sharing these types of information, even unintentionally, could result in harm to the Company and legal action against the Associate or the Company.

Corporate Social Media Policy

Communications on behalf of the Company

- Certain Associates have been given express authorization to make communications on behalf of the Company using social media or to maintain a social media account on behalf of the Company.

- This policy does not apply to any such communications to the extent that they are made within the scope of the express authorization provided by the Marketing Department.

- Persons making authorized social media communications on behalf of the Company remain subject to the Code of Business Conduct and Ethics.

- Unless specifically authorized by the Marketing Department, Associates are prohibited from creating, maintaining, or using any social media account that purports to be on behalf of the Company, or that gives the appearance that it is being maintained on behalf of the Company

Corporate Social Media Policy

Associates Identity Online

- Associates are personally responsible for all communications and information they publish online without the Company's express authorization.

- Using a Company email address may imply that the Associate is acting on the Company's behalf.

- Because social media and networking activities are public, an Associate's Company email address and Company assets should be used only to perform job-related activities, which may include professional networking but do not include personal social networking.

- Outside the workplace, Associates have a right to participate in social media and networks using their personal email address. However, information and communications that Associates publish on personal online sites should never be attributed to the Company or appear to be endorsed by, or to have originated from, the Company.

- If an Associate chooses to disclose his or her affiliation with the Company in an online communication, then the Associate must treat all communications associated with the disclosure as professional communications governed by this and other Company policies.

- Since they are in the public domain, the Company reserves the right to monitor Associates' social media sites and blogs for compliance with this policy and the Company Code of Business Conduct and Ethics.

Corporate Social Media Policy

Limitations on Online Publications

- Associates should never identify a customer or co-worker in an online posting without his or her prior written permission.
- Associates should not use social media to harass, intimidate, or threaten another Associate, whether or not such communications are created during work hours.
- Associates should obey the law and ethics rules. Do not post any information or engage in any online activity that violates applicable local, state or federal laws, or professional rules of conduct.
- Associates should never make any defamatory remarks through social media. False statements tending to harm a person's reputation, including those that subject the person to public contempt, disgrace, or ridicule, or adversely affect the person's business, are expressly prohibited.
- Associates should identify all copyrighted or borrowed material with citations and links. When publishing direct or paraphrased quotes, thoughts, ideas, photos or videos, give credit to the original publisher or author.
- Associates should direct all requests for references for current or former Company Associates to Human Resources. Comments Associates post about current and former Associates can have legal consequences, even if Associates make the comments personally and not on the Company's behalf.
- Associates may not incorporate the Company's logo or other intellectual property in a website, blog, chat room, video-sharing site, bulletin board or other social media without the Company's written permission.
- Associates may not maintain a website, blog, chat room, video-sharing site, bulletin board or other social media that promotes the Company.

Corporate Social Media Policy

Creating and Managing Content

- If a blogger or any other online participant posts an inaccurate, accusatory or negative comment about the Company or any of its Associates, Associates should not respond to the post without the approval of the Business Unit's Marketing Department. This is not intended to include or encompass any collaboration or discussion with other Associates regarding their employment with the Company.

- Associates should refrain from publishing comments about controversial or potentially inflammatory subjects, including politics, sex, religion or any other non-business related subjects in any posts or other online communications involving or referencing the Company.

- Associates should avoid hostile or harassing communications in any posts or other online communications involving or referencing the Company. Harassment includes any offensive conduct based on a person's race, sex, gender, gender identity, national origin, color, disability, age, sexual orientation, veteran status, marital status, religion or any other status protected by law.