



# MARKETING PLAN

2016

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## Goals

- To solidify MedHOK's position as the premier software for health plans and other risk-bearing entities offering government-sponsored programs.
- To generate positive brand awareness for the company.



“A brand is a story that is always being told” - Scott Bedbury

# BRANDING



# MedHOK's Story

- US healthcare is moving to a value-based system and health plans are struggling to succeed because of the many compliance demands, disparate data, legacy systems, and overall lack of transparency and clarity surrounding the member.
- Health plans MUST find a solution to manage compliance throughout the care continuum with a focus on value and quality – or they will cease to exist in this new healthcare model.
- In an attempt to manage the many moving pieces, payers are grasping at individual solutions and quickly finding that it doesn't solve the entire problem.
- ONLY MEDHOK combines all medical and pharmacy data into one platform, removing data silos, and bringing data to a global level. The MedHOK software platform enables health plans to take control of their business and succeed in the new value-based healthcare environment and beyond.
- **MedHOK was founded based on the converging requirements of value-based healthcare and compliance.** Health plans and risk-bearing entities need a single platform to manage risk, care, and quality with a holistic view of the member.



# About Us Boiler Plate

MedHOK's pioneering software platform empowers health plans and other risk-bearing entities offering government-sponsored programs to excel in risk, quality, and care management, while ensuring compliance with federal and state requirements. The only software that integrates pharmacy and medical care on a single platform, MedHOK creates a 360° view of the member, allowing payers to identify and target member health risks, intelligently trigger workflow interventions, and improve quality of care to succeed in the value-based revenue model. Out-of-the-box compliant and proactively updated for Medicare, Medicaid, and Affordable Care Act regulations, our SaaS-based software is a compliance powerhouse.

Recognized by *Inc.* magazine in 2014 as the nation's 25<sup>th</sup> fastest growing private company and the 6<sup>th</sup> fastest growing private healthcare company, MedHOK is NCQA certified in HEDIS®, Pay for Performance, and Disease Management. MedHOK is the software platform of choice for more than 50 of the nation's largest healthcare payers, managing close to 40 million lives. Visit [www.MedHOK.com](http://www.MedHOK.com) or call (888) 9MEDHOK.

*(159 words)*



# About Us Elevator and Party

## ELEVATOR

MedHOK is a pioneering software platform for health plans and other risk-bearing entities participating in government-sponsored programs. Some of the nation's largest healthcare payers rely on MedHOK's single platform for managing risk, care, and quality to ensure compliance. Out-of-the-box compliant and proactively updated for Medicare, Medicaid, and Affordable Care Act regulations, our SaaS-based software is a compliance powerhouse.

*(46 words)*

## PARTY

MedHOK is a software company that creates an innovative software platform for some of the nation's largest healthcare payers, helping them ensure compliance, enhance revenue, and be successful in a value-based healthcare environment.

*(33 words)*



## Tag Line

Simplify. Control. Succeed.





# Logo – Slight Revision – No Gradation

Solid Black or one color

**MedHOK**® 

**MedHOK**® 

The Future Of Healthcare

Gray scale

**MedHOK**® 

**MedHOK**® 

The Future Of Healthcare

Two color - PMS 2747 and PMS 7489

**MedHOK**® 

**MedHOK**® 

The Future Of Healthcare

Icon



# Corporate Fonts

- Headline font:
  - **Franklin Gothic Medium**
- Body copy font:
  - Calibri



# Color Palette

## Primary Colors



PMS: 2747  
CMYK: 100/85/4/16  
RGB: 0/37/122  
HEX: 00257A



PMS: 7489  
CMYK: 55/2/75/5  
RGB: 115/175/85  
HEX: 73AF55



PMS: 716  
CMYK: 0/55/90/0  
RGB: 236/122/8  
HEX: EC7A08



PMS: 431  
CMYK: 45/27/17/51  
RGB: 94/106/113  
HEX: 5E6A71

## Secondary Colors



PMS: 7454  
CMYK: 62/22/4/11  
RGB: 100/147/181  
HEX: 6493B5



PMS: 578  
CMYK: 27/1/42/3  
RGB: 184/207/149  
HEX: B8CF95



PMS: 7411  
CMYK: 0/42/69/0  
RGB: 225/163/88  
HEX: E1A358



PMS: 877  
CMYK: 45.39.38.2  
RGB: 145.143.144  
HEX: 918F8F



# Email Signature

Michelle Frank  
Chief Growth Officer

813.304.2800 ext. 000  
813.555.5555 (cell)  
[mfrank@MedHOK.com](mailto:mfrank@MedHOK.com)



Calibri 11 pt; Black  
Calibri 11pt; RGB 0/37/122

Statement of confidentiality: Calibri 8 pt.  
justified; RGB: 94/106/113

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# Letterhead/Business Card/Powerpoint

**MedHOK**  
The Future Of Healthcare

July 9, 2015

Company Name  
First name Last name  
123 Main Street  
Tampa, FL 00000

Dear Contact Name,

Start letter here. Continue here and keep going. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce luctus lacus in faucibus egestas. Quisque quis pulvinar nunc, ut commodo neque. Sed quis mi eu ante porttitor dapibus vitae suscipit sapien. Nunc faucibus tempus tempus. Vivamus commodo facilisis lectus a congue. Phasellus pretium eu libero a aliquam. Etiam cursus tempor sapien nec auctor. Mauris tempor auctor tellus, euismod feugiat tortor aliquam non. Ut in nisi orci. Cras ipsum risus, aliquet non nunc nec, scelerisque placerat nisi.

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Sincerely,

MedHOK Employee  
Title  
(813) 304-2800 ext. ###  
[lastname@medhok.com](mailto:lastname@medhok.com)

  
(813) 304-2800 | (888) 9MEDHOK | [www.MedHOK.com](http://www.MedHOK.com)  
5550 W. Idlewild Avenue, Suite 150 | Tampa, FL 33634

**Letterhead/Business Card/Powerpoint**

**MedHOK**  
The Future Of Healthcare

April 9, 2015

Company Name  
First name Last name  
123 Main Street  
Tampa, FL 00000

Dear Contact Name,

Start letter here. Continue here and keep going. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce luctus lacus in faucibus egestas. Quisque quis pulvinar nunc, ut commodo neque. Sed quis mi eu ante porttitor dapibus vitae suscipit sapien. Nunc faucibus tempus tempus. Vivamus commodo facilisis lectus a congue. Phasellus pretium eu libero a aliquam. Etiam cursus tempor sapien nec auctor. Mauris tempor auctor tellus, euismod feugiat tortor aliquam non. Ut in nisi orci. Cras ipsum risus, aliquet non nunc nec, scelerisque placerat nisi.


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Sincerely,

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The Future Of Healthcare

**Michelle Frank**  
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“Know your customer so well the product sells itself” - Peter Drucker

# TARGET AUDIENCES



# Target Audiences



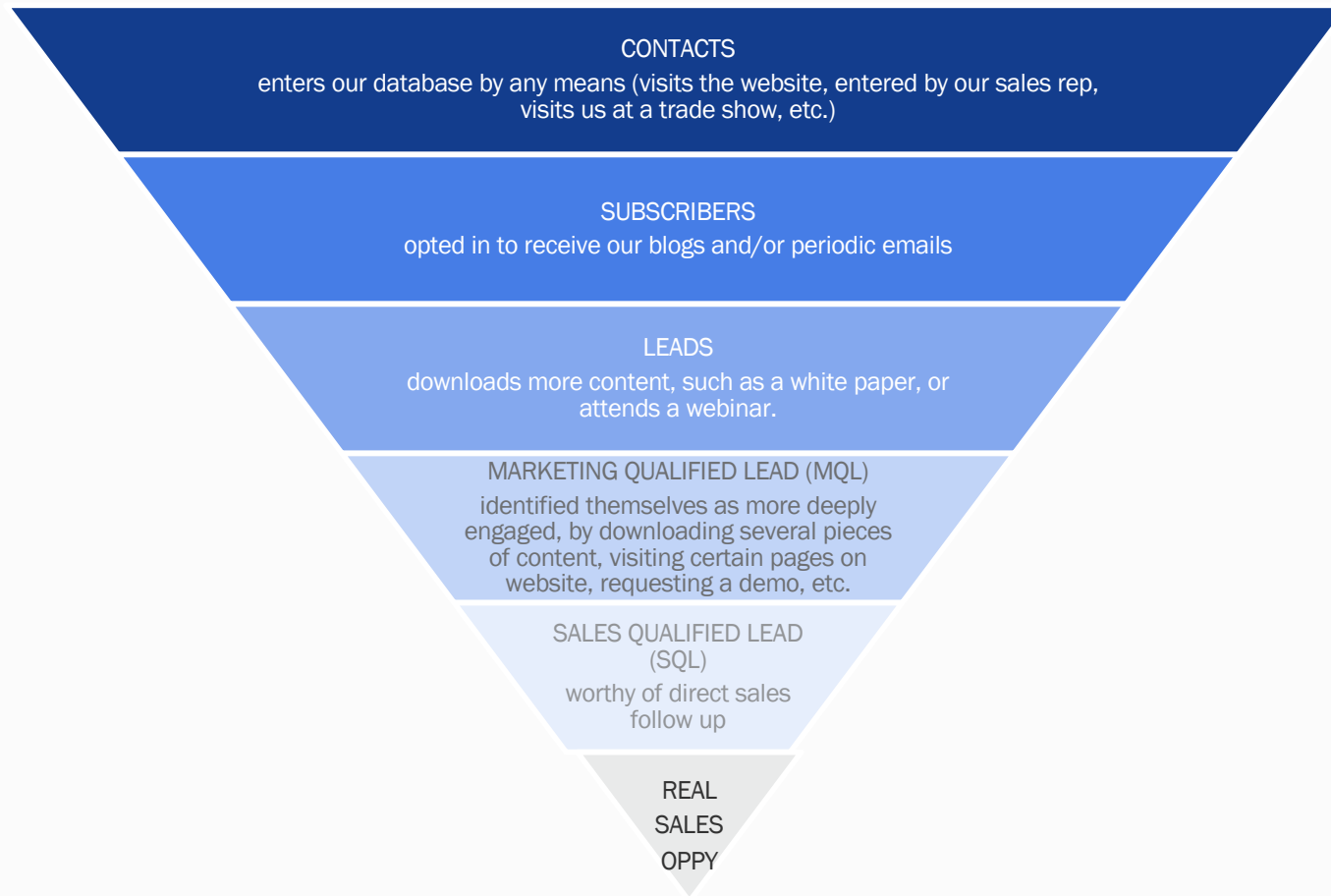
# Buyer Journey - Compliance

| BUYER STAGES            | AWARENESS >>   | CONSIDERATION >>  | DECISION  |
|-------------------------|--|---|---|
| User Behavior           | Have realized and expressed symptoms of a potential problem or opportunity                                 | Have clearly designed and given a name to their problem or opportunity          | Have defined their solution, strategy, method, or approach                                    |
| Research and Info Needs | Research focused on CMS updates/articles on compliance and healthcare reform; how others are managing data | Looking at how like companies are solving the problem of data and compliance    |   |
| Content Type            | CMS memos/documents; research reports; Guides; ebooks; editorial/articles/news; white papers               | White papers; podcasts/videos; checklists; white papers; guides; ebooks         | RFPs, vendor comparisons, product comparisons, case studies, trials/demos; product literature |
| Key Terms               | Improve, Optimize, Prevent, Reduce, Resolve, Troubleshoot...   | Solution, Software  | Compare, Review, Test, Benchmark  |
| Example                 | It's getting harder and harder to keep up with CMS' compliance demands!                                    | We need software/technology to help us manage this data and maintain compliance | We're sending an RFP to software companies to see if their solution meets our needs.          |





# Marketing Lifecycle



“If you don’t know where you’re going, you might not get there.” – Yogi Berra

# OBJECTIVES



## Objectives

- To increase/establish the number of contacts in each stage of the marketing/sales lifecycle:

|               | Current | 2015 Q4 | 2016 Q1 | 2016 Q2 | 2016 Q3 | 2016 Q4 |
|---------------|---------|---------|---------|---------|---------|---------|
| Contacts      | 990     | 1,200   | 1,500   | 1,900   | 2,300   | 2,600   |
| Subscribers   | 368     | 440     | 550     | 700     | 1,000   | 1,350   |
| Leads         | NA      | 50      | 100     | 200     | 350     | 500     |
| MQL           | NA      | 15      | 30      | 80      | 120     | 200     |
| SQL           | NA      | 12      | 15      | 35      | 65      | 100     |
| Opportunities | 0       | 6       | 11      | 20      | 30      | 50      |

- 50 Opportunities = approximately \$30 million in pipeline



# Objectives

- To fully integrate CPS product offerings/services into the MedHOK messaging and marketing
  - CPS website forward to MedHOK.com
  - CPS emails converted to MedHOK.com email
  - CPS client log in integrated into MedHOK client portal
  - CPS clients included in
    - Attract [number] web visits focused on enrollment by [date]
    - Convert [number] leads focused on enrollment by [date]
    - Close [number] customers focused on enrollment by [date]



# Objectives

- To increase media presence with positive media coverage:
  - By EOY 2015
    - Press releases: Bi-monthly press releases
  - 2016
    - Press releases: Bi-monthly press releases
    - Media mentions: Goal 25
    - Features: Goal 3
    - Bylined articles: Goal 4



“Without a strategy, goals are just intentions.” – Gloria Flores

# STRATEGIES



# MARKETING OVERVIEW

| 2016 Objectives:                     | Branding/<br>Awareness | New Logo Demand<br>Gen | Existing Client<br>Expansion | Define/Own Market<br>Space |
|--------------------------------------|------------------------|------------------------|------------------------------|----------------------------|
| Collateral                           | ✓                      | ✓                      | ✓                            |                            |
| Trade shows/ speaking<br>opportunity | ✓                      | ✓                      | ✓                            | ✓                          |
| Webinars                             | ✓                      | ✓                      | ✓                            |                            |
| PR/Awards                            | ✓                      | ✓                      |                              | ✓                          |
| Analyst Relations                    | ✓                      | ✓                      |                              | ✓                          |
| Channel Partnerships                 |                        | ✓                      | ✓                            |                            |
| Product Marketing<br>Strategy        | ✓                      | ✓                      | ✓                            | ✓                          |
| Digital media                        | ✓                      | ✓                      | ✓                            | ✓                          |
| Thought Leadership                   | ✓                      | ✓                      | ✓                            | ✓                          |
| Social Media                         | ✓                      | ✓                      | ✓                            |                            |
| Web/SEO                              | ✓                      | ✓                      | ✓                            | ✓                          |



# Content Marketing

- Educate prospects and clients on changes within the healthcare industry, addressing their individual pain points based on their role in the organization and point in their buying journey.
- Tactics:
  - White Papers/E-Books on various topics pertaining to the buyer's journey (awareness/consideration/decision) for the different personas (CEO/Technology/Compliance); Monthly at a minimum.
  - Weekly blog posts with emails announcing new post
  - Bi-monthly client webinars and quarterly prospect webinars
  - Emails to subscribers regarding new white papers, webinars, etc.
  - Landing pages on website to encourage downloading content.





# Communications

- Utilize email to communicate regularly with prospects and clients
- Tactics:
  - Develop Drip Email Campaigns based on persona and stage to keep contacts engaged
    - *Example:*
      - White paper on HEDIS downloaded – contact becomes Lead (if not already)
      - Immediate email thanking for download and link to related blog posts, and ask to subscribe to blog
      - 7 days later, email suggesting other similar white papers/fact sheets, etc.
      - 7 days later, ask for feedback – did the content answer their questions? What other questions do you have about (topic)?
        - » If respond, move to MQL or SQL and provide information
      - Every 30 days until contact becomes Marketing Qualified Lead (MQL), send email recommending content on website (paper, fact sheet, webinar, etc.), and blog subscription (if not already subscriber)
    - Create Crisis Communications plan to effectively communicate with employees, customers, and media in case of any disruption in service/communication (e.g., power outage, natural disaster)



# Public Relations

- Engage industry and national media through proactive and regular press releases, media outreach, community involvement, and awards
- Tactics:
  - Bi-monthly press releases to industry media, national and local when applicable
  - Regular media relations and outreach with key industry journalists, pitching features and bylined article opportunities
  - Nasdaq Globewire wire releases
  - Identify and enter company awards/lists
  - Participate in community sponsorships/events



# Industry Involvement

- Represent MedHOK's expertise and show commitment to the industry through relevant industry involvement opportunities
- Tactics:
  - Identify potential speaking opportunities and submit call for proposals and/or contact directly
  - Exhibit at industry trade shows (Schedule for 2016 TBD)
  - Maintain memberships in industry associations and maximize all benefits offered (current: Association for Community Affiliated Plans (ACAP); Academy of Managed Care Pharmacy (AMCP); California Association of Health Plans (CAHP) )
  - Work with partners to develop mutually beneficial cross-sell opportunities



# Advertising

- Promote MedHOK in industry publications with targeted online/digital campaigns.
- Tactics
  - Test AHIP Smartbrief e-newsletter sponsorship (Q4 2015); Possibly roll out if response rates are favorable
  - Take advantage of association/sponsorship benefits that offer web or email advertising as perk
  - Co-op opportunities with Partners



# Web

- Utilize our website to engage prospects and customers
- Tactics:
  - Revise MedHOK website to be a destination for information
  - Utilize HubSpot in coordination with Salesforce to track visitors on the MedHOK website, building a targeted email list
  - Engage target audiences/media on social media channels: Twitter, LinkedIn, YouTube, and SlideShare



# Collateral

- Create collateral to be used as sales support and tradeshow information
  - Platform brochure
  - Brochures for each of the three areas (Risk, Care, Quality)
    - Deep Dive document – format module descriptions
    - RFP/pricing proposals – executive summary and module descriptions
  - Sales tools such as Powerpoint slides for demos, IT overview, Implementation overview
  - Establish templates for all employees with proper branding



“A budget is telling your money where to go instead of wondering where it went.” – Dave Ramsey

# BUDGET

