

FBC: AssuredExcellence Marketing Material through Implementation

Sales and Service

This document will serve as your guide to marketing materials for sales and service in addition to client implementation.

Tom Rosenbaum from AP Hunt Valley, MD will serve as your main point of contact during any stage of your client conversations, from initial presentation to guidance for implementation. I've included his contact info here and he will help or direct you to the proper personnel to assist in achieving your AssuredExcellence (AE) goals.

NOTE: PRIOR TO PRESENTING THIS SERVICE TO A SELF FUNDED GROUP CHECK IF THE GROUPS CURRENT STOP LOSS IS CARVED IN WITH THE SAME MEDICAL ASO AS SOME CARRIERS WILL NOT RECOGNIZE THE PROGRAM – Review with Tom Rosenbaum to ensure Stop Loss Carrier fit for AssuredExcellence.

Available Material

The marketing material *is not branded NIS and will remain so* as AssuredExcellence is available to us through our parent company, AP. This should be explained as such to our prospects for AssuredExcellence. *Note: Some of the documents are either Powerpoint or Word format, and as such, will need to be downloaded to view.*

- [AssuredExcellence FAQ](#)
- [AssuredExcellence NIS Training Powerpoint](#)
- [General AssuredExcellence EE Flyer](#)
- [AssuredExcellence Case Study Powerpoint](#)
- [AssuredExcellence Oncology Flyer](#)
- [AP Benefit Advisors NDA Word Document](#)
- [AssuredExcellence Employer Contract 2020-2021](#)
- [Stop Loss Agreement AssuredExcellence Word Document](#)

Group Characteristics

- Self-Funded

How to Begin the AssuredExcellence Discussion with the Group

- Review in detail the group's current, past, and ongoing utilization and High Claimant experience reports with DHA (Director of Health Plan Analytics – Pierre) for applicability prior to client discussion.
- Reference the NIS Service Model to time and document your discussion.
- Explain to the group what you discovered in their utilization and explain AssuredExcellence as an option along with supporting Marketing material.
- Describe why they should be looking at this as an option:
 - » Educate (advantages/disadvantages)
 - » Provide Case Studies

Cover Group Considerations/Next Steps

- Comfort level with the concept.
- Do they agree this would benefit them in the short and long run.
- CFO/Superintendent involved from the beginning.
- Have AssuredExcellence create a savings analysis report for the group.

- Discuss savings analysis with DHA to decide if there is value to moving forward.
- Take results/notes from DHA mtg to group.
- If value is there and the group wants to move to the next step set up a deeper dive appointment with Tom Rosenbaum.
- * if moving forward/sold:
 - » Relay what is needed to get started (use AssuredExcellence team and Implementation steps below)
 - » Proceed to Implementation steps

Implementation

- Employer decides to move forward with AssuredExcellence directions:
- Step 1 – Have the group review and sign the NDA (this must occur before AP will release the bundled surgery rates).
- Step 2 – NIS coordinates a call with the group and AP AssuredExcellence team to discuss procedures, logistics and other questions.
- Step 3 – The group will receive the AssuredExcellence Employer Contract for review and signature.
- Step 3 – The groups Stop Loss carrier reviews and signs the Stop Loss Agreement; this ensures that any claims from the program will be covered under the Stop Loss contract .

NOTE: AssuredExcellence personnel will assist and coach you and the client through the entire process.



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