FBC: CompleteCare Marketing Material through Implementation

Sales and Service

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

Alden Yi is 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 CompleteCare goals.

Available Material

The marketing material is *not* branded NIS and *will* remain so as CompleteCare is available to us through our associate companies and our vendor partners. This should be explained as such.

Keenan, Catalize, and J&K Consultants (vendor partners) will assist and coach you through the entire process.

- AP CompleteCare Flyer NIS
- CompleteCare Flyer Schools
- CompleteCare Flyer Muni
- CompleteCare Case Study 100 Life (SD)
- CompleteCare Case Study 1000 Life (PA)
- CompleteCare Questionnaire with Recommendations
- New Client Information Form - Catalize Health

Group Characteristics

- 500 + lives minimum offered on a voluntary basis
- 300 + lives to be discussed with Alden Yi
- Offering may be mandatory or voluntary dependent on the Employer and discussion with Alden Yi

How to Begin the CompleteCare Discussion with the Group

- Recap groups current, past and ongoing utilization and high claimant experience by dependent class reports with DHA (Director of Health Plan Analytics – Pierre) prior to client discussion.
- Reference the NIS Service Model to time and document your discussion.
- Explain to group what you discovered in their utilization, by dependent class, and explain CompleteCare 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
- Are there any geographic concerns regarding other area employers
- CFO/Superintendent involvement from the beginning
- Discuss and agree upon next steps

- Create a Savings Analysis for the group
  - » Below is what Keenan will need to create a savings analysis. The top three bullets are required and the others (not required) help with plan design.
    - * Fully insured equivalent premiums
    - * Contribution strategy
    - * Enrollment by tier
    - * Claims data
    - * Summary of benefits and coverage/benefits booklet
- Discuss Savings Analysis with DHA to decide if there is value moving forward
- Take results from DHA mtg to group
- If value is there and the group wants to move to the next step set deeper dive appointment with Alden Yi.
- *If moving forward/sold
- Relay what is needed to get started (use Questionnaire, Implementation Timeline, New Client Info Form).
- Proceed to implementation steps.

Implementation

- The CompleteCare timeline provides a general overview of implementation
- The new client information form should be completed during the prospecting phase to secure exclusivity for each client with Catalize. Once a go forward decision is made, the attached Questionnaire kicks off the process
- With Keenan assistance, proceed to completion of attached CompleteCare Implementation forms

NOTE: Keenan, Catalize, and J&K Consultants (vendor partners) will assist and coach you through the entire process.

Alden Yi

Director - Keenan Financial Services

Keenan

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License No. 0451271

2355 Crenshaw Blvd., Suite 200 | Torrance, CA 90501

p 310.212.0363 ext. 3621 | f: 310.328.6793