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Drive Frictionless Customer Journeys In Highly Complex Environments

blueshift

Joan Jenkins
CMO

blueshift

Frances Carroll
Manager, Marketing Automation

GoHealth

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GoHealth

GoHealth is a leading health insurance marketplace working to improve access to healthcare in America.

We work directly with insurance carriers and enroll beneficiaries in plans nationwide.

GoHealth helps consumers:

- Select the right Medicare plans
- Coordinate their care
- Fully maximize their benefits

Licensed insurance brokers

Dedicated Medicare brokers comparing plans in real time to find you the best fit for your needs.

Sophisticated Technology

Real time quoting technology for our brokers that easily matches best plans and compares benefit options.

Telecare Team

One-on-One TeleCare Support via Phone. Your TeleCare Team member works directly with your insurance carrier- so they know your plan benefits and offerings best.

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THE Challenge

- Capture and activate data for useful journeys and personalization
- Create highly targeted and complex user journeys triggered from events and other key data points
- Reach customers based on different demographics, accessibility, and intents across channels

THE Goal

- Foster ongoing engagement with customers across the lifecycle
- Drive customer acquisition and generate more opportunities
- Improve contact rates, drive more conversions, and increase engagement
- Boost customer retention rates

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Keeping Customers Engaged Throughout the Lifecycle

1

Awareness & Education Before Eligibility

Stay Top of Mind

2

Convert Target Audience When Eligible

Personalize the Right Offer

3

Maximize Plan Benefits Post-Conversion

Drive Ongoing Engagement

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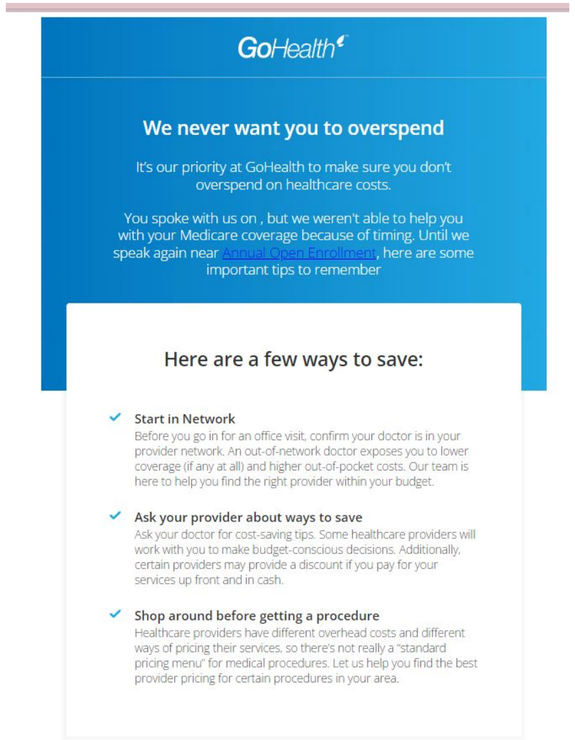
1. Awareness & Education Before Eligibility: Stay Top of Mind

Ad

- Digital / Social Ad
- Focusing on savings

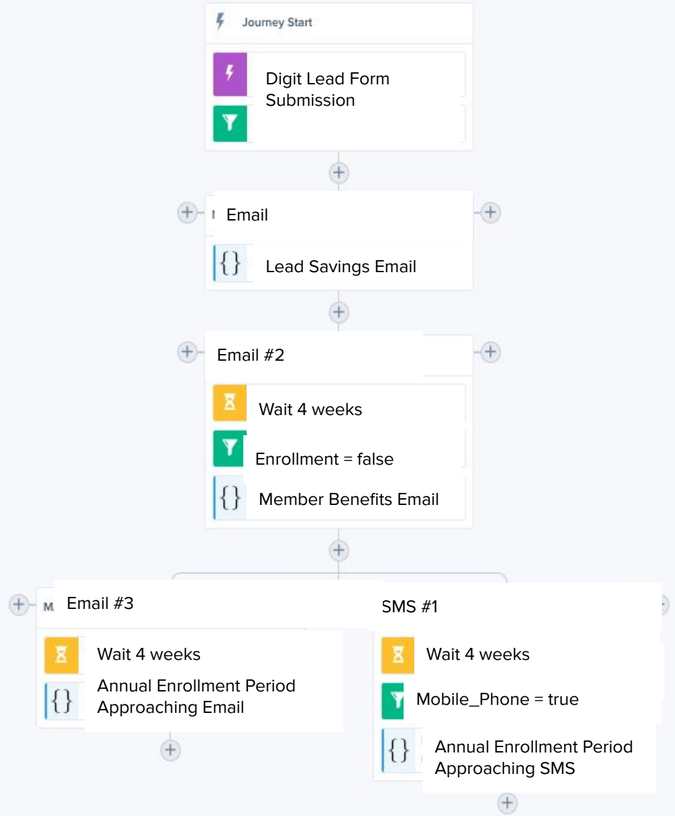
Segment

- Leads that came in through digital
- Interested in savings
- Not eligible to enroll until Annual Enrollment



Journey

- Send Savings email
- Follow up with a GoHealth benefits email (a few weeks later)
- Finally send email/SMS when eligibility period is approaching
  - Use SMS only during or close to eligibility period



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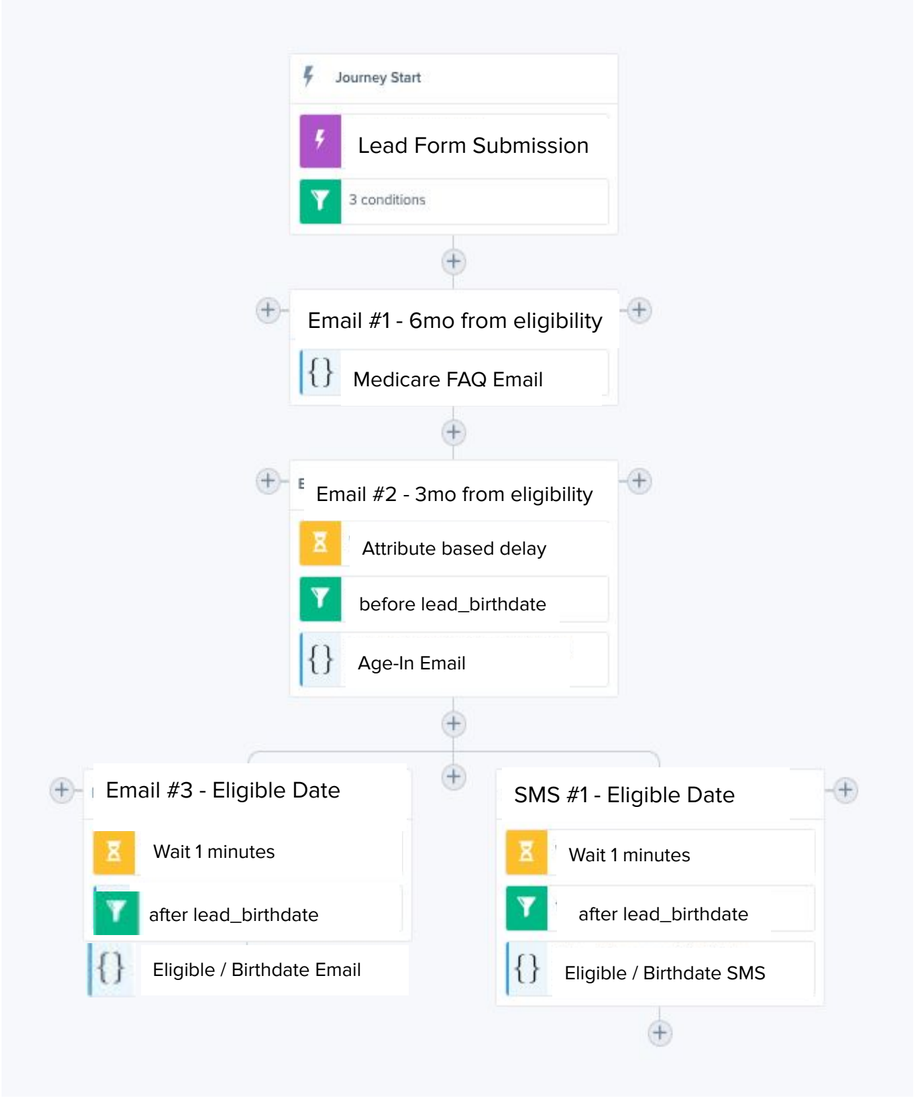
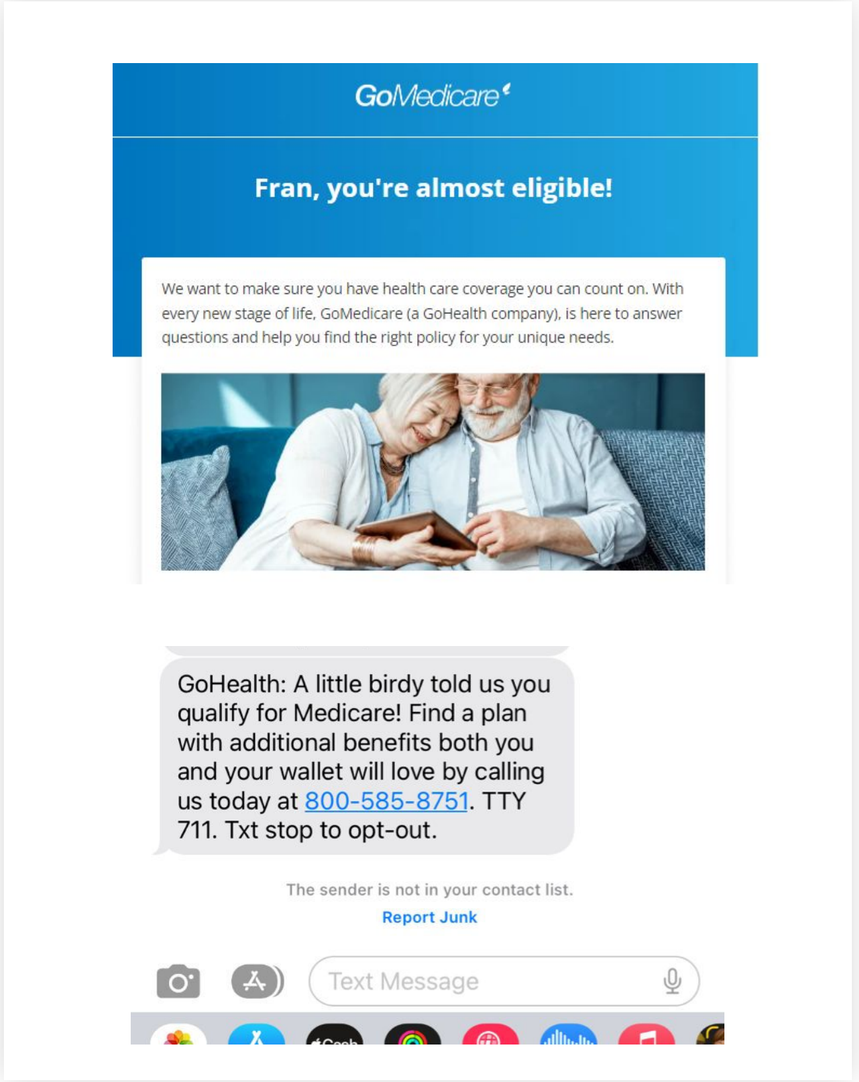
2. Convert Target Audience When Eligible: Personalize The Right Offer





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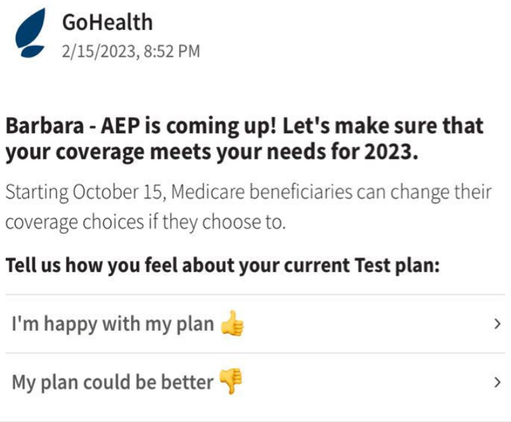
3. Post-Conversion: Actionable Engagement and Member Satisfaction

SURVEY

Ensure member satisfaction

- Survey
- Segment
  - Segment based on response
  - Segment based on channel preference
- Take Action



SEGMENT

UNHAPPY

Schedule call during eligible period

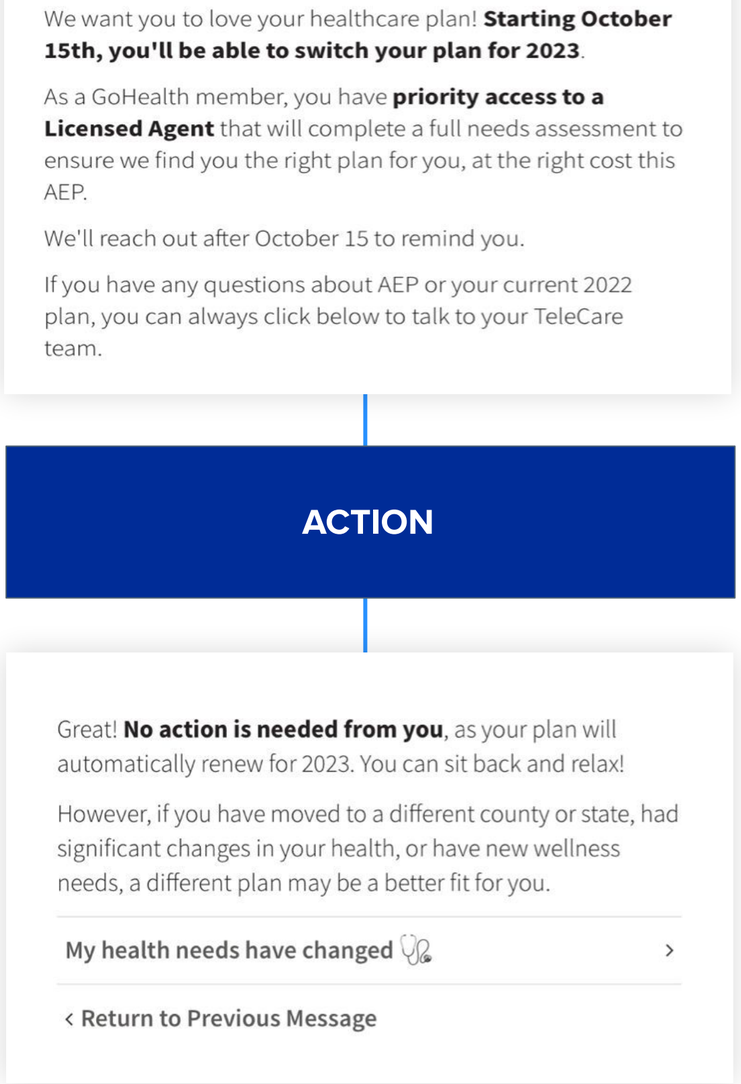
Follow-up via sms, email, phone when eligible

HAPPY

Trigger immediate response

Enroll in ongoing engagement campaign

ACTION



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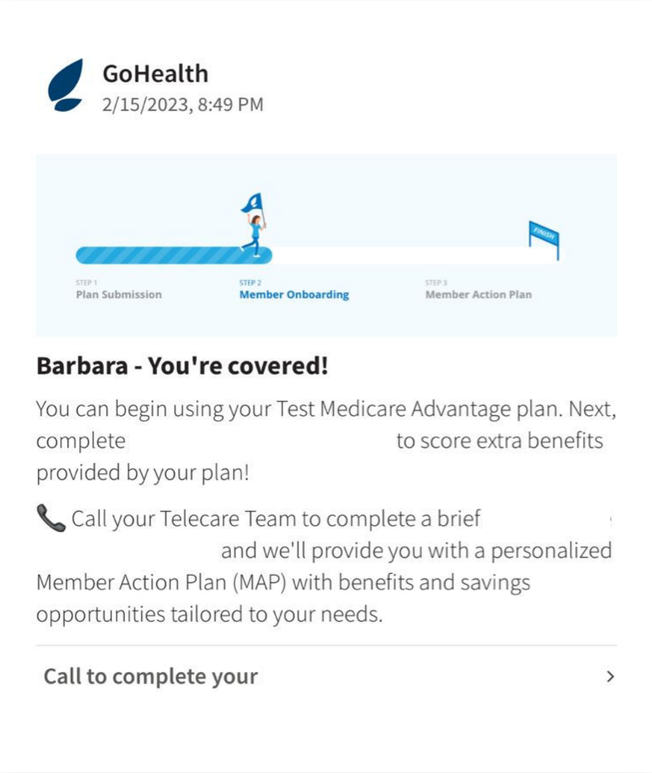
3. Post-Conversion: Ongoing Engagement



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Cross-Channel Engagement

SMS

Highest Intent

Mobile phone users, younger demographic, higher intent, active members

- Before/during highest sales periods
- Low traffic times
- Most engaged member communication
- Action needed touchpoints

Call

Medium/High Intent

Immediately new leads, landline only, older demographic, those who decline digital outreach

- Immediate lead follow-up
- Agent-required actions
- Most important journey touchpoints

Direct Mail

Medium Intent

Those without stable access to internet, lower-contact-rate, older demographic

- Welcome material
- Annual check-ins or updates
- Introduction of new programs

Email

Lowest Intent

All members with valid email address, users acquired through digital channel/ad

- Complementary touchpoint to other channel outreach
- Regular engagement outreach, confirmations
- Non-urgent reminders

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A Fireside Chat

With Frances & Joan

Thank you!

Joan Jenkins
CMO,
Blueshift

Joan.Jenkins@blueshift.com

LinkedIn

Frances Carroll
Manager, Marketing Automation, GoHealth

fcarroll@gohealth.com

LinkedIn

blueshift