

# Drive Frictionless Customer Journeys In Highly Complex Environments

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**blueshift**





**Joan Jenkins**  
CMO



**Frances Carroll**  
Manager, Marketing Automation



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# Drive Frictionless Customer Journeys In Highly Complex Environments

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**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.

## 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

# 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

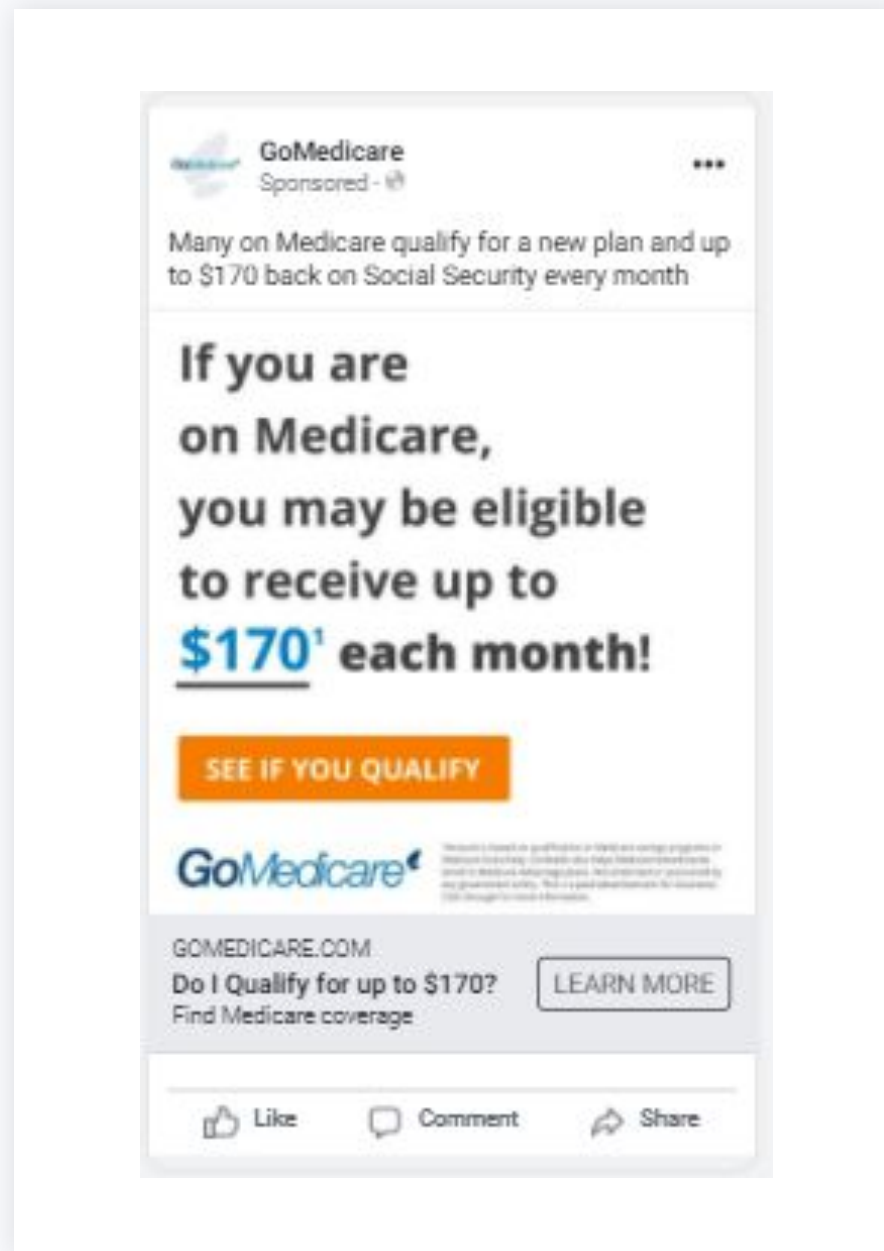
**Maximize Plan Benefits  
Post-Conversion**

*Drive Ongoing Engagement*

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

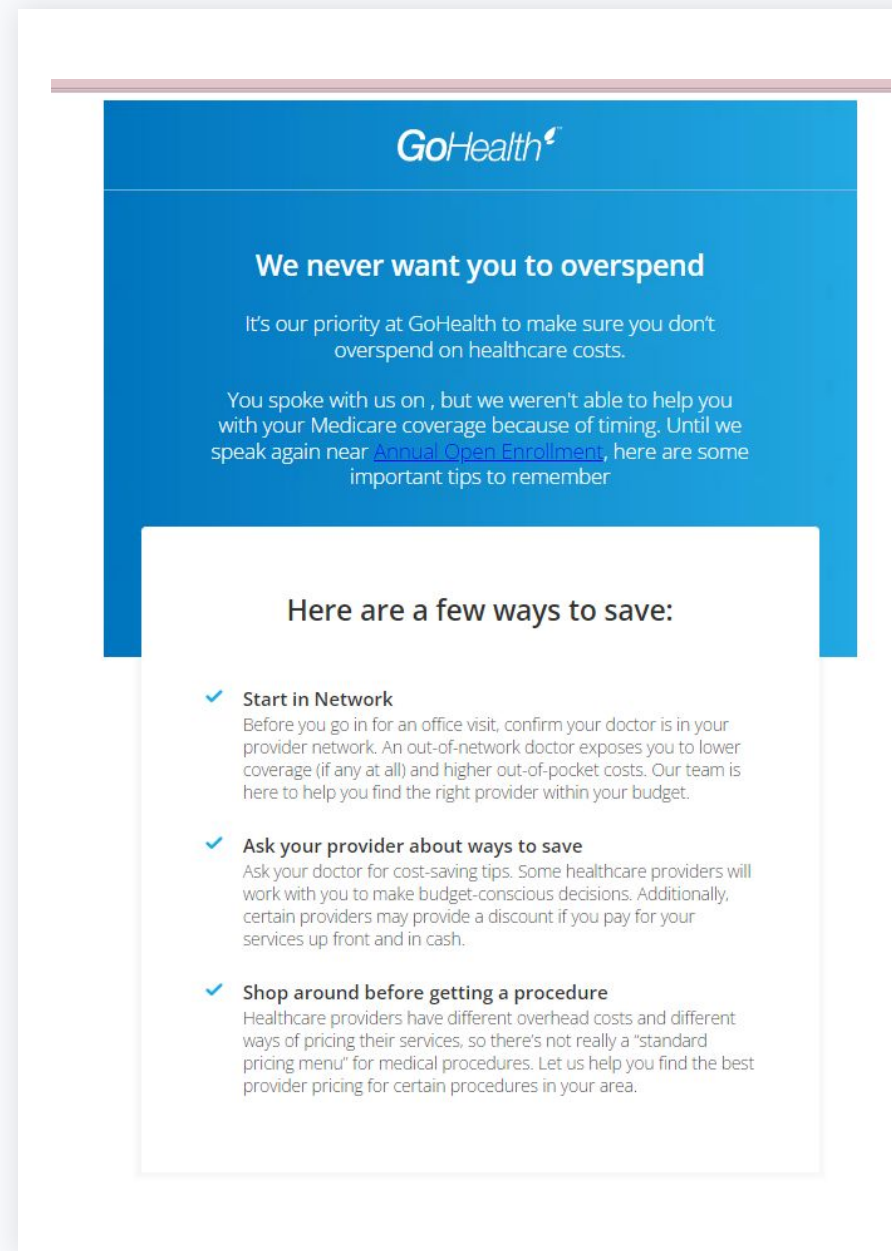
## Ad

- Digital / Social Ad
- Focusing on savings



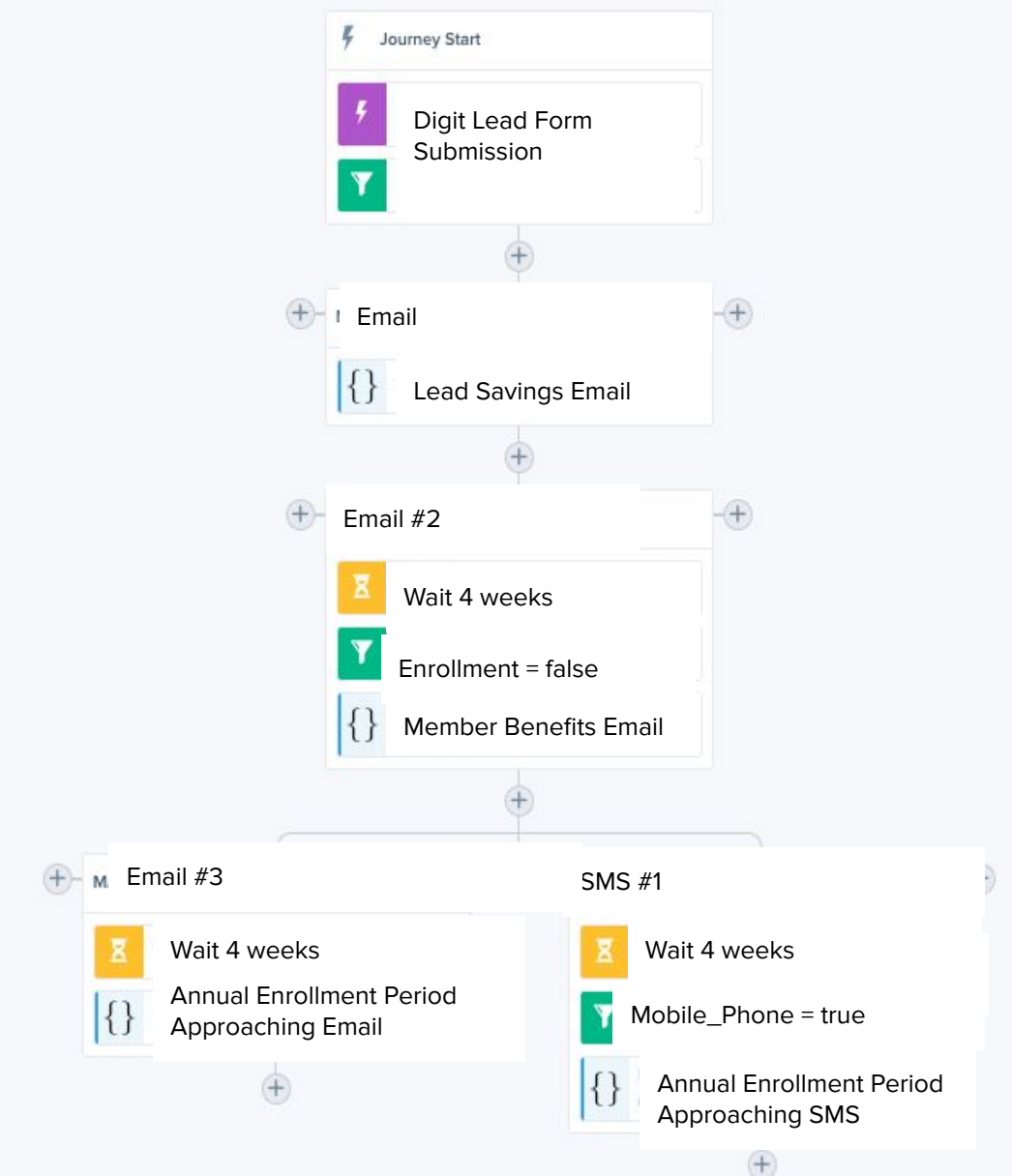
## Segment

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

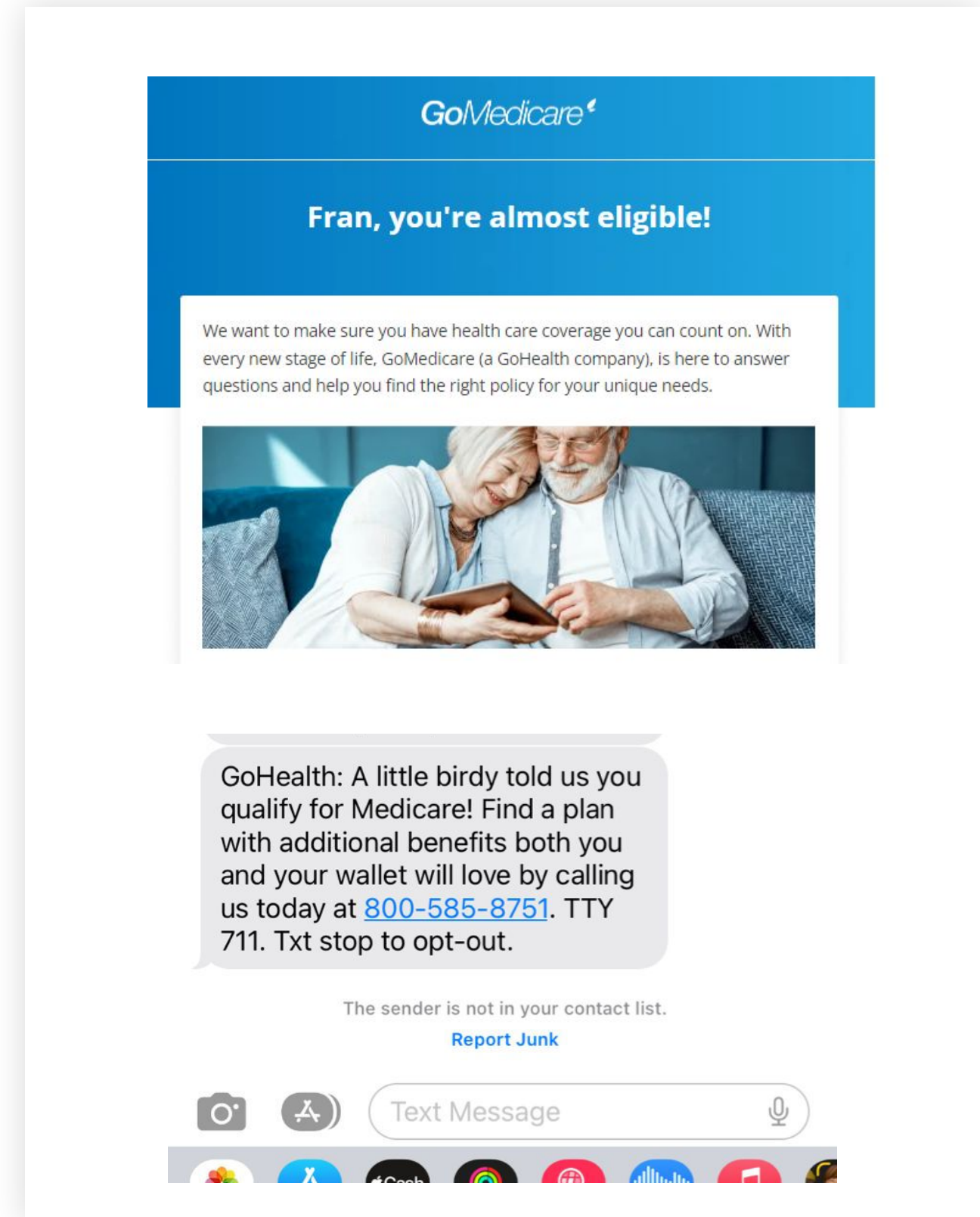
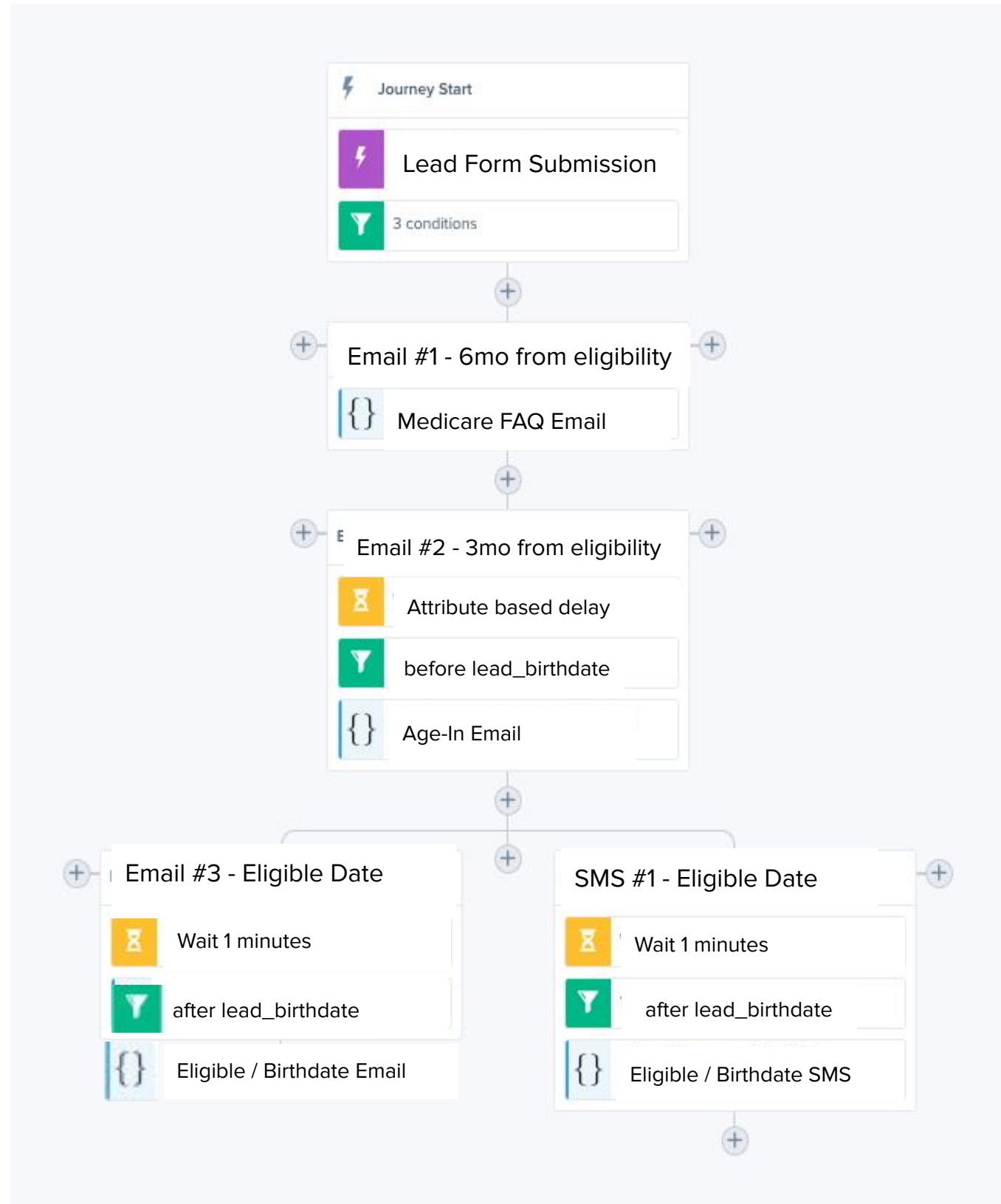


## Journey

- 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



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



# 3. Post-Conversion: Actionable Engagement and Member Satisfaction

## Ensure member satisfaction

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

## UNHAPPY

Schedule call during eligible period

Follow-up via sms, email, phone when eligible

We want you to love your healthcare plan! **Starting October 15th, you'll be able to switch your plan for 2023.**

As a GoHealth member, you have **priority access to a Licensed Agent** that will complete a full needs assessment to ensure we find you the right plan for you, at the right cost this AEP.

We'll reach out after October 15 to remind you.

If you have any questions about AEP or your current 2022 plan, you can always click below to talk to your TeleCare team.

## SURVEY

## SEGMENT

## ACTION



**Barbara - AEP is coming up! Let's make sure that your coverage meets your needs for 2023.**

Starting October 15, Medicare beneficiaries can change their coverage choices if they choose to.

**Tell us how you feel about your current Test plan:**

I'm happy with my plan 👍 >

My plan could be better 👎 >

## HAPPY

Trigger immediate response

Enroll in ongoing engagement campaign

Great! **No action is needed from you**, as your plan will automatically renew for 2023. You can sit back and relax!

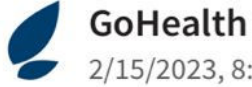
However, if you have moved to a different county or state, had significant changes in your health, or have new wellness needs, a different plan may be a better fit for you.

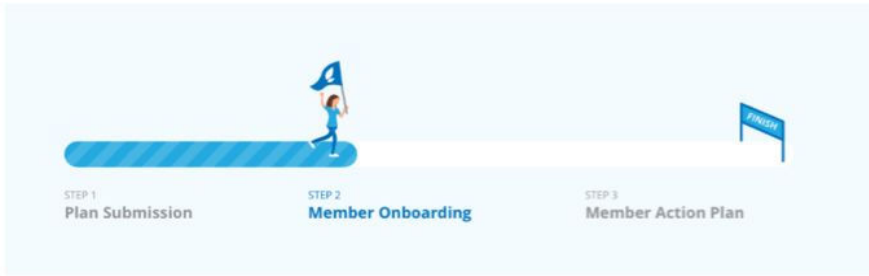
**My health needs have changed** 🏠 >

< Return to Previous Message




### 3. Post-Conversion: Ongoing Engagement

 2/15/2023, 8:49 PM





**Barbara - You're covered!**

You can begin using your Test Medicare Advantage plan. Next, complete [redacted] to score extra benefits provided by your plan!

 Call your Telecare Team to complete a brief [redacted] and we'll provide you with a personalized Member Action Plan (MAP) with benefits and savings opportunities tailored to your needs.

**Call to complete your [redacted]** >

 2/15/2023, 8:52 PM




**Happy Holidays**

From Your **GoHealth** Family!

During this season, we at GoHealth want to take time to reflect upon the good things we have... like our partnership with you!

We appreciate working with you and hope that the holidays and the coming year will bring you **health and happiness.**



**Rob - Start using your exclusive findhelp access today!**

At GoHealth, we care about assisting you beyond what your plan can offer. As a member of GoHealth you get *exclusive* access to our findhelp partnership.

# 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



# A Fireside Chat

With Frances & Joan

# Thank you!

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**Joan Jenkins**  
CMO,  
Blueshift

✉ [Joan.Jenkins@blueshift.com](mailto:Joan.Jenkins@blueshift.com)

**in** [LinkedIn](#)

**blueshift**

**Frances Carroll**  
Manager, Marketing Automation, GoHealth

✉ [fc Carroll@gohealth.com](mailto:fc Carroll@gohealth.com)

**in** [LinkedIn](#)