

# **Kaiser Permanente Scope of Services / Scope of Work**

## **2004 Proposal**

February 11, 2004



# Scope of Services / Scope of Work Proposal

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# **Kaiser Permanente Scope of Work**

## **2004 Draft Proposal**

February 11, 2004



# Scope-of-Work Draft – Kaiser Permanente

## Brand Communications Strategy

- Develop a focused creative strategy that communicates the power of the Kaiser Permanente positioning/Total Health platform in a compelling and differentiating manner:
  - Must reposition the Brand/overcome negative/misperceptions (including personal relationship with physician, choice and location)
  - Must be relevant/credible to members as well as non-members (must conquest and build loyalty)
  - Must be relevant and translatable to purchaser and internal targets (business-to-business, sales, internal communications)
  - Must have ability to drive holistic, integrated communications, both vertically (top to bottom of funnel) and horizontally (across various target audiences)
  - Must include a plan for evolving from the current Kaiser Permanente Brand positioning/communications platform to the new Brand positioning/communications platform, as well as comprehend communication of future innovations/reasons to believe (such as Health Connect) as they are offered system-wide.



# Scope-of-Work Draft – Kaiser Permanente

## Brand Image Creative

- Develop brand image creative that brings the brand communications strategy to life in a compelling, breakthrough manner:
  - Builds awareness and consideration among non-members
  - Differentiates the Brand by communicating unique, unmatched benefits: Total Health
  - Re-position the Brand: Overcome Misperceptions
  - Focuses on non-members while remaining relevant to current members
  - Comprehends the importance of reaching and being relevant to the internal "Kaiser Permanente Family" target
- Deliverables within agreed-upon timetable (June 1, 2004):
  - Television 2-3 Spots (must allow for regional targeting)
  - Latino Television 1-2 Spots
  - Radio 4-8 Core Spots (with TBD number of regional versions)
  - Latino Radio TBD
  - Print TBD (pending media mix by market)
  - Out of Home TBD (up to 4 executions depending on media mix/market)
  - Graphic Standard Guide/Ad maker Kit/Visual Brand Language consultation



# Scope-of-Work Draft – Kaiser Permanente

## Integrated Marketing Plan

- Take a holistic approach to integrating the brand communications strategy and brand image creative idea throughout all external (consumer)/internal brand touch points.
- Develop recommendations/options relative to communication mix allocations across primary/non-primary media channels.

## Media Planning and Buying

- Kaiser Permanente Brand Media Plan to be developed on a spot-market basis with direction of the Program Office at Kaiser Permanente for the key markets in each region. Specifically:
  - Georgia
  - Mid-Atlantic
  - Ohio
  - Colorado
  - Northwest
  - Northern California
  - Southern California
  - Hawaii
- Spot media buys, based on approved plans will be handled through a partnership with Initiative Media.
- Spot media plans/buys will be reviewed with Regional Marketing/Advertising Teams on a regular basis (TBD), by Agency/Kaiser Permanente Program Office.



# Scope-of-Work Draft – Kaiser Permanente

## Business-to-Business

- Develop a business-to-business communication strategy and advertising concepts that are an integrated part of the new Brand Image campaign. Following strategic input from the client, 2004 deliverables to include:
  - Communications Strategy and Creative Brief
  - Development of 2004 Media Budget/Timing
  - Development of Executional Needs
- Business-to-business advertising/production/execution still to be determined.



# Scope-of-Work Draft – Kaiser Permanente

## Health Education

- Develop potential strategic and tactical initiatives that reposition Kaiser Permanente Health Education initiatives to better support the new Brand positioning/Total Health platform and new Brand Image campaign:
  - Assumes understanding that this is an ongoing project involving many Kaiser Permanente constituents, over the long term (beyond 2004).
  - Assumes that at minimum, strategic/creative input from Campbell-Ewald will be part of 2004 scope.
  - Assumes that creative/tactical elements will be developed/supplied through campaign integration/internal "family" communications initiatives. In 2004 and further, executional development will be handled on a project basis or encompassed in 2005 planning.





# Scope-of-Work Draft – Kaiser Permanente

## Kaiser Permanente Family/Internal Communication Plan

- Work with Kaiser Permanente Program Office to develop their operational brand positioning plan for employee communication and merchandising. Specifically, a plan to help communicate where the company is going, utilizing the new Brand Image campaign as a platform/conduit for this communication.
- Targets include:
  - Senior Management
  - Employees:
    - > Physicians/Health Professionals
    - > Facilities Staff
    - > Sales Staff
  - Members



# Scope-of-Work Draft – Kaiser Permanente

## Kaiser Permanente Family/Internal Communication Plan (continued)

- Deliverables:
  - Development of an executable communication plan (with key Kaiser Permanente management input)
  - Executional elements to include all advertising materials, and at minimum, integrate internal communications message into existing channels/media (i.e. newsletters, posters, websites, etc.)
  - Campbell-Ewald to provide specific cost proposals/options for execution of family/internal communication packages for inclusion in 2004 production budgets or from other appropriate funding sources to be determined



# Scope-of-Work Draft – Kaiser Permanente

## **Support of Kaiser Permanente Regional Integration**

- Partner with Kaiser Permanente Program Office in developing/conducting regular meetings/dialogs (to be established) with all Regional Marketing Staffs to review the following:
  - Brand advertising plans/executions
  - Brand/Regional media plans/buys
  - Internal communication plans/executions
  - Dialog on Regional Marketing situation/issues that may impact the above

## **Support Kaiser Permanente Templating Project**

- Partner with Kaiser Permanente to incorporate Signature Brand concepts/messaging and executional elements into the design and execution of new facilities.



# **Kaiser Permanente Scope-of-Service Model**

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# Scope of Service Model – Kaiser Permanente

## Organization

- Organizationally, scope of services is designed to cover breadth of agency services/ resources utilized by Kaiser Permanente in the ongoing development and execution of brand communications plans and creative deliverables. Categories are organized as follows:
  - Account Management Supervision and Planning:
    - > Single-Point Delivery Scope of Service
  - Strategic Planning/Research
  - Creative/Production
    - > Broadcast
    - > Print
  - Media Planning
    - > Media Buying
  - Agency Support Resources



# Scope of Service Model – Kaiser Permanente

## Organization

- Logistically, we propose delivering the Campbell-Ewald Scope of Service model in the following manner:
  - Account Management: Los Angeles
  - Creative: Los Angeles/Detroit
  - Integrated Planning, Services and Resources: Detroit
  - Strategic Planning: Detroit
  - Media Planning: Detroit
  - Media Buying: Initiative Media  
*(managed by Campbell-Ewald)*
  - Latino Market Creative/Media: accentmarketing  
*(managed by Campbell-Ewald)*



# Scope of Service Model – Kaiser Permanente

## Overview

- Function as single-point delivery source in the conceptualization, strategic development and execution of multi-faceted, integrated communications plans as determined by Kaiser Permanente's marketing needs, specifically:
  - Support in-depth analysis of Kaiser Permanente marketplace situation
  - Development of integrated communication and media plans
  - Implementation/execution of tactical initiatives born out of communications plan which may include any or all of the following:
    - > Primary Media Advertising: TV/Print/Radio/Outdoor
    - > Diversity Marketing Integration and Development: Latino Market
    - > Business-to-Business Advertising Integration
    - > Internal Communications Plans
    - > Digital/Interactive Initiatives (project basis)
    - > Customer Relationship Marketing Initiatives (CRM) (project basis)
    - > Tours/Event Development and Execution (project basis)
  - Ongoing tracking and analysis of communications effectiveness



# Scope of Service Model – Kaiser Permanente

## Account Management Supervision and Planning

Single-point management of all agreed-upon Kaiser-Permanente Advertising and Integrated Marketing Communication activities.

- Partnership with Kaiser Permanente Program Office to develop:
  - Annual Situation Analysis Development Support
  - Annual Integrated Marketing Communications Plans
  - Diversity Marketing Plan Integration: Latino Market
    - > Primary liaison with accentmarketing partner
  - Support Kaiser Permanente Regional Integration
  - Copy management of all Kaiser Permanente marketing communication assets
  - Support Kaiser Permanente Program Office in the development and stewardship of Media Production Budgets
  - Analysis of ongoing marketplace tracking





# Scope of Service Model – Kaiser Permanente

## **Account Management Supervision and Planning** (continued)

- Direct Agency Integrated Communications Group in the execution of the following (project basis):
  - > Interactive Initiatives
  - > Customer Relationship Marketing (CRM) Initiatives
  - > Publishing/ Collateral
  
- Advertising Presentations/Reviews for Kaiser Permanente Management
  
- Competitive Reviews



# Scope of Service Model – Kaiser Permanente

## Strategic Planning/Research

- Partnership with Agency Account Management to develop/deliver:
  - Key consumer/audience insights
  - Understanding unique regional consumer insights
  - Input/shaping of Fusion Propositions, creative briefs, creative messaging
  - Synergistic, thoughtful research plans based off of strategic imperatives
  - Understanding of and implementation of proprietary research tools
- Responsible for strategic input in all facets of integrated communication planning and execution.
- Ongoing tracking and analysis support.



# Scope of Service Model – Kaiser Permanente

## Creative and Production

- Single-point creative management in the development and execution of all Kaiser Permanente marketing communication elements.
- Partnership with Kaiser Permanente Program Office and Agency Account Management to develop/deliver:
  - Creative strategies consistent with integrated marketing communications plans
  - Creative concepts that deliver against approved communication strategies
  - Supervision of creative consistency across all points of communications elements:
    - > Creative execution of advertising: **television, print, radio, out-of-home**
    - > Creative execution of potential marketing communication elements:  
**web/business-to-business, direct response, CRM (direct marketing), collateral**
    - > Development and maintenance of Kaiser Permanente creative executional equities, style and standards, input on Kaiser Permanente Visual Brand Language



# Scope of Service Model – Kaiser Permanente

## **Creative and Production** (continued)

- Stewardship of production budgetary resources.
- Coordination/direction of creative suppliers.
- Quality control supervision to assure accuracy and fidelity of all creative execution deliverables by production partners/suppliers.



# Scope of Service Model – Kaiser Permanente

## Media

- Partner with Kaiser Permanente Program Office to develop media plans designed to effectively communicate the brand communication strategy within the eight Kaiser-Permanente regions, inclusive of the following:
  - Media mix recommendation
  - Media budget development and stewardship in market
  - Latino market media planning with partner, Accentmarketing
- Manage partnership with Initiative Media for media buying in each of Kaiser Permanente's eight regions.

