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
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.
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
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.
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.
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.
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
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
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

2004 Proposal

February 11, 2004
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
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)
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
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.