

# Centivo Partnership Plan

Marketing & Communications

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- 1. 2023 Key Messages
- 2. Communications Toolbox
- 3. Phased Marketing Approach
- 4. Appendix
  - a. Communications Calendar



# Key Messages



## Know What You Owe

Simple copays when you use in-network doctors and facilities provide predictability, so you know what to expect.



## High Quality Care

Develop personal relationships with a caring team who guides you through the healthcare system, prioritizing your personal health goals and needs.



## Care Where You Need It

Wherever you go, your coverage goes with you. Out-of-state and emergency care are provided to you and your family.



## Easy to Use

Your team ensures you get the right care at the right time—including specialists when you need them—for a better healthcare experience.

# Communication Toolbox



Home Mailing

- Postcard



Outlook Emails

- Personas
- Currently enrolled
- Not enrolled



Onsite Signage

- U.S. Bank Building elevator signage
- Desk drops
- Breakroom posters



Workday Journey

- Videos
- Workday Articles
- FAQs



Live Sessions

- Centivo onsite (TBD)
- Team meetings by request w/ Benefits
- Live webinars

# Centivo Videos

Introduction

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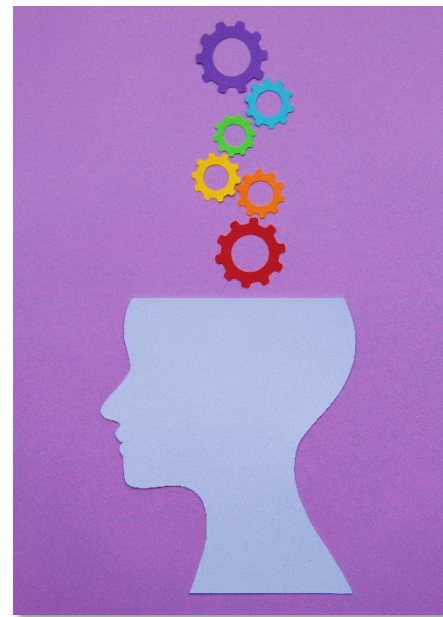
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# Phase I: Know

Goal: Associates understand our key messages.

High-level plan details educating associates around key messages:

- Postcard Home Mailing
- Onsite signage + QR code
- Introductory email ft. Video



## Phase II: Feel

Goal: Associates see Centivo as a viable option for their healthcare needs.

Personalized marketing leveraging demographics and personas:

- Email on Guided Care
- Video Demonstrating Centivo Experience
- “Fireside Chat” w/ Centivo
- Launch Centivo Journey



# Phase III: Do

Goal: Associates enroll with Centivo for the 2023 plan year.

Tools and resource to help associates select the plan that best fits their needs:

- Benefits Decision Tool
- Live/Onsite Sessions w/ Centivo
- Workday Open Enrollment Journey

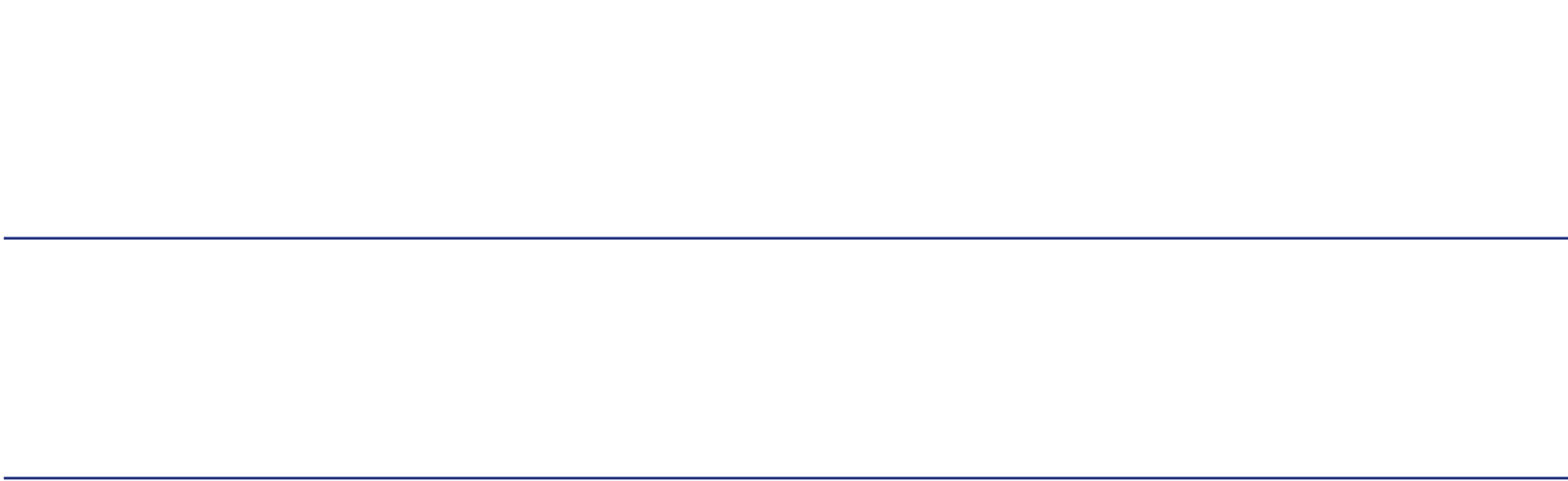




# Associate Touchpoints



Phase I



# Open Enrollment Plan

HR Communications

# Contents

1. 2023 Key Messages
2. Phased Approach
3. Associate Touchpoints
4. Communications Calendar



# Key Messages



## What's New in 2023

Get started by familiarizing yourself with the changes coming to your Baird Benefits in the new plan year.



## Learn | Explore Your Options

Explore the many benefits that support you and your family at every step of the journey.



## Plan | Find Your Fit

Determine your bottom line and review the benefits and plans that best suit your lifestyle and priorities.



## Choose | Elect Your Benefits

Enroll in the healthcare, life and disability, retirement and paid/voluntary benefits during the Open Enrollment period from November 7 – 18, 2022.

# Phase I: Learn

Goal: Inform Associates with the “when” and “what” of OE.

Deliver communications to educate associates around key messages and important dates:

1. **Home Mailing:** Postcard sent to home addresses
  - a. QR code to Enrollment Guide (PDF) housed on the backend of the Baird Careers site
2. **Digital signage**
  - a. Elevator signage in Milwaukee, Chicago and Louisville
3. **OE Introduction Email**
  - a. Manager Preview + Associate email to kick off open enrollment season from CHRO

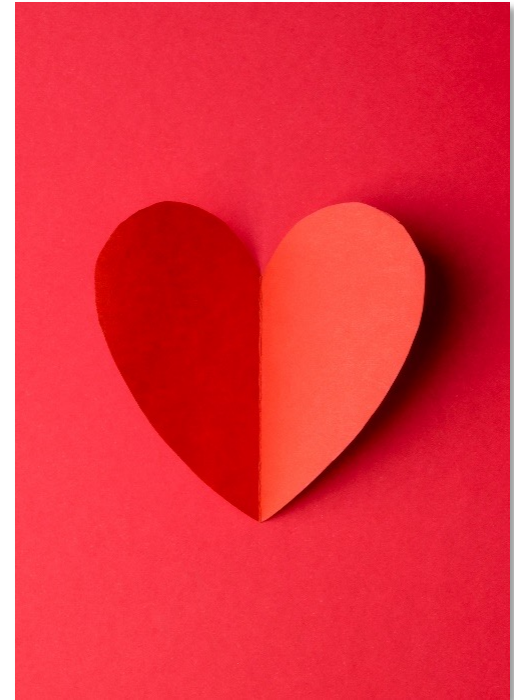


# Phase II: Plan

Goal: Associates understand their options and believe their benefits to be fair and comprehensive.

Empower associates to “find their fit” and explore their options with:

1. Detailed Email
  - a. Email outlining important information and support tools from Baird Total Rewards (prefaced in kick-off email)
2. Workday Journey Launch
  - a. *Tentative – May eliminate Journey for 2023 OE to simplify*
3. Enrollment Guide
  - a. Simplified version of the Benefit Guide
  - b. Provide personas/scenario-based examples for a more personalized experience



# Phase III: Choose

Goal: Associates enroll in their benefits for the 2023 plan year.

Tools and resource to help associates select the plan that best fits their needs:

1. Workday / BairdWeb Reminders & Support
2. Benefits Decision Tool



# Additional Items to Highlight

- Promote UnitedHealthcare Silver Plan / Centivo (when applicable)
- Download Workday Mobile App
- Benefit Decision Tool



Phase I

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# Communications Calendar: August

Monday	Tuesday	Wednesday	Thursday	Friday
1   B\Well Reminder Email	2	3	4	5 Intro Email V01 Routed to TR Intro Video V01 Routed to TR
8   Centivo Phase I	9   HC Sub-Comm. Approval	10	11 Intro Email V02 Complete Intro Video V02 Complete	12   RJT Update Mtng. Intro Email v02 Routed to CHRO Intro Video V02 Routed to CHRO Collateral Delivered from Centivo
15   B\Well Reminder Email	16 Print Materials Routed to CHRO	17 Intro Email V02 Feedback Intro Video V02 Feedback	18   Centivo Approval on Materials Intro Email V03 Feedback Intro Video V03 Feedback	19 Intro Email V03 Routed to CHRO Intro Video V03 Routed to CHRO
22   Manager Snapshot (Sept.) Centivo WD Article Review HR Focus Group: WD Articles	23   B\Well Leader Report Coffee Break w/ Steve	24 Print Materials Finalized Intro Email Finalized Intro Video Finalized	25   HR News (Sept.) Postcard Routed to Proj. Serv. Video 1 Voiceover / to Prod	26   RJT Update Mtng. Print Materials to DigiCopy Finalize Centivo WD Articles
29   HR Ops Stand-up Meeting Video 1 Complete	30   HRBP/BA Meeting HR Ops/BP Email 1 Preview	31 Intro Email to Assoc.	1	2 Journey Outline Routed to TR Email 2 V01 Routed to TR Video 2 V01 Routed to TR

# Communications Calendar: September



Monday	Tuesday	Wednesday	Thursday	Friday
			1	2   MDER: Labor Day
5	6   BWell Reminder	7	8	9
	Email 2 Draft Finalized	Journey Outline Routed to TR		Journey Outline V02 Complete
Baird Holiday: Labor Day	Video 2 Outline Finalized	Email 2 V01 Routed to TR		Email 2 V02 Complete
	Video 2 Outline Finalized	Video 2 V01 Routed to TR		Video 2 V02 Complete
12	13	14	15	16   OE CHRO Presentation
	Journey Outline Routed to CHRO			Email 2 Finalized
	Email 2 Routed to CHRO	Centivo Signage to Offices	Centivo routes Webinar Deck	Video 2 Finalized
	Video 2 Routed to CHRO			
	United Way Campaign			
19   BWell Reminder Email	20	21	22	23   BWell Deadline
Video 2 Voiceover / to Prod	OE Print Materials Routed to TR		OE Print Materials Routed to CHRO	Video 2 Complete
Journey Content Added in WD	Centivo WD Journey Testing		Centivo Postcard Mailing	HR Ops/BP Email 2 Preview
	United Way Campaign			
26   Manager Snapshot (Oct.)	27	28	29   HR News + AAA (October) Coffee Break w/ Steve	30
OE Print Materials Approved / to Prj. Srv.				
Email 2 to Associates				
Centivo WD Journey Launch	OE Decision Tools Routed to TR			OE Decision Tools Routed to CHRO

# Communications Calendar: October



Monday	Tuesday	Wednesday	Thursday	Friday
3	4	5	6	7
Centivo Webinar Reminder Email		IDI Enrollment Period (~50-70 associates)		
10	11	12	13	14
Conversation with Centivo	HRBP Team OE Briefing		HR Ops Team OE Briefing	Benefits Decision Tool Ready
OE Emails Routed to TR	HR Ops Team OE Briefing		OE Emails Routed to CHRO	Benefits Guide Complete
IDI Enrollment Period (~50-70 associates)				
17	18	19	20	21
HR Ops/BP Exec. Emails Preview				
OE Emails Approved (CHRO)				
24   Manager Snapshot (Nov.)	25   All Associate Briefing	26	27   HR News (Nov.)	28
CHRO Associate Email			OE BW Homepage Banner →	
31	Open Enrollment BW Homepage Banner (OE is Coming)			

# Communications Calendar: November

Monday	Tuesday	Wednesday	Thursday	Friday
	1	2	3	4
	OE Postcard Mailing			
Open Enrollment BW Homepage Banner (OE is Coming)				
7   Open Enrollment Phase 4	8	9	10	11
BW: OE Starts Today			Centivo Virtual Help Session	
WD: Announcement/Reminder			WD: Reminder 1	
OPEN ENROLLMENT				
14	15	16	17   Coffee Break w/ Steve	18
	Centivo Virtual Help Session			
	WD: Reminder 2		WD: Reminder 3	
BW: 5 Days Left to Enroll		BW: 4 Days Left to Enroll		WD: Reminder 4
BW: 3 Days Left to Enroll		BW: 2 Days Left to Enroll		BW: 2 Days Left to Enroll
OPEN ENROLLMENT				
21   Open Enrollment Phase 5 Manager Snapshot (Dec.)	22	23	24	25
RJT Associate Email (Survey)		MDER: Thanksgiving		Baird Early Closure: 1 p.m.
28   HR News (Dec.)	29	30		

# Appendix

2023 Open Enrollment | Centivo Marketing Strategy

# Communication Toolbox

## Home Mailing



- Benefits At-a-Glance Brochure
- Postcard

## Outlook Emails



- CHRO Kick-off
- BTR w/ Details
- Targeted Messages

## Onsite Signage



- U.S. Bank Building elevator signage
- Desk drops
- Breakroom posters

## Workday Journey



- Video(s)
- Workday Articles
- Enrollment Guide/  
checklist

## Other/ Misc.



- Live Sessions: Centivo + Total Rewards by request
- HR News/Mgr. Snapshot
- BairdWeb / Workday

# Onsite Print Materials

**BAIRD**

## When it comes to your healthcare, you're not alone.

You have unique health needs and concerns. The Centivo Partnership Plan has you and your family covered.



-  **KNOW WHAT YOU OWE** | Simple copays with in-network care provide predictability.
-  **HIGH-QUALITY CARE** | Your Primary Care Team guides you through the healthcare system.
-  **CARE WHERE YOU NEED IT** | Emergency and out-of-state care for you and your dependents.
-  **EASY TO USE** | Get the right care at the right time—including specialty care—when you need it.

Search "Centivo" in Workday or use the QR code to learn how The Partnership Plan protects the well-being of you and your family.

You can select the Centivo plan during Open Enrollment this November.



**BAIRD**

## Searching for predictable, easy-to-use healthcare?

### You found it.



-  **KNOW WHAT YOU OWE** | Simple copays with in-network care provide predictability.
-  **HIGH-QUALITY CARE** | Your Primary Care Team guides you through the healthcare system.
-  **CARE WHERE YOU NEED IT** | Emergency and out-of-state care coverage.
-  **EASY TO USE** | Get the right care at the right time—including specialty care—when you need it.

Search "Centivo" in Workday or use the QR code to learn how this healthcare option protects the well-being of you and your family.

You can select the Centivo plan during Open Enrollment this November.





# Postcard

BAIRD

Searching for predictable,  
easy-to-use healthcare?

BAIRD

**You found it.**



**Know What You Owe**



**High-Quality Care**



**Care Where You Need It**



**Easy to Use**

 **CENTIVO**®

When it comes to your health  
care, you're not alone.

You have unique health needs and concerns.  
The Centivo Partnership Plan has you and your  
family covered.



**KNOW WHAT YOU OWE** | Simple copays with  
in-network care provide predictability.



**HIGH-QUALITY CARE** | Your Primary Care Team  
guides you through the healthcare system.



**CARE WHERE YOU NEED IT** | Emergency and out-of-  
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Search "Centivo" in Workday or use the QR code to learn how The Partnership Plan  
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