

# CASE STUDY

## SIMPLIFICA



### BRANDEXPERIENCE **EXPERT** GRANDEXPERIENCE

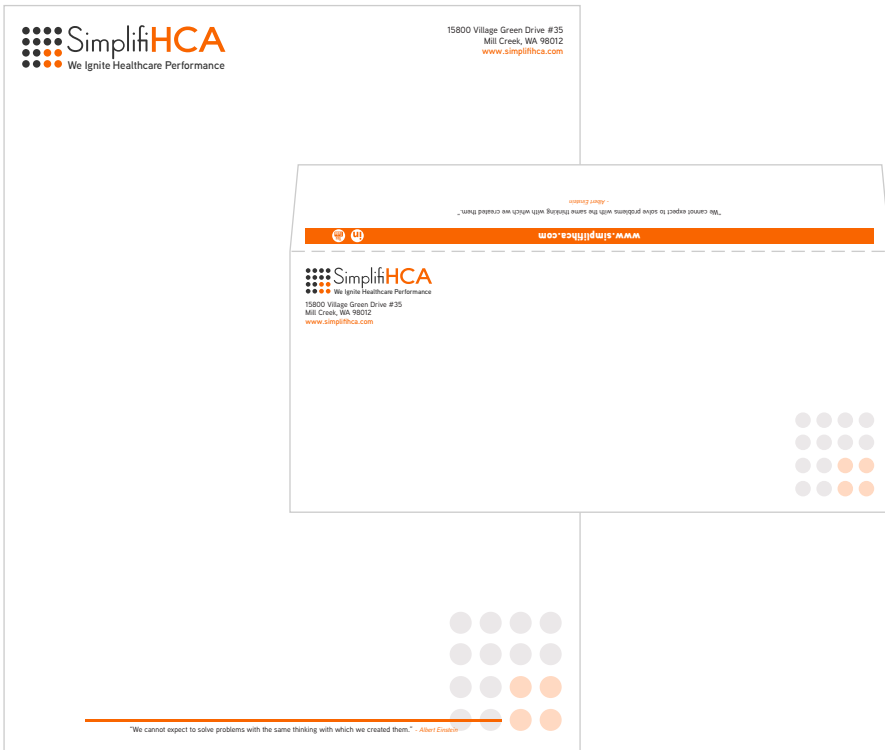
An example of a **Summary of Services** working with a client/partner to *fully engage the creative process* and provide optimal **BRAND EXPERIENCE**.

“We are what we *repeatedly do*.  
**Excellence**, then, is not an act  
but a **habit**...”

– Aristotle

[www.designcanbedangerous.com](http://www.designcanbedangerous.com)

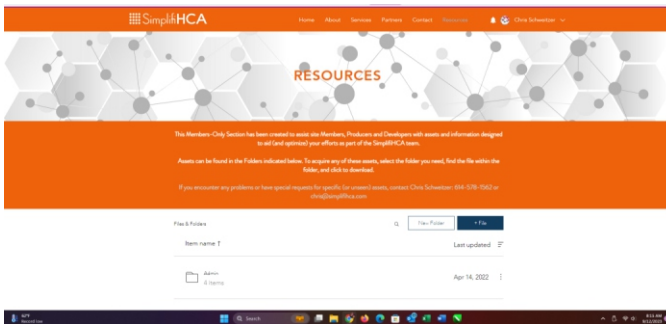
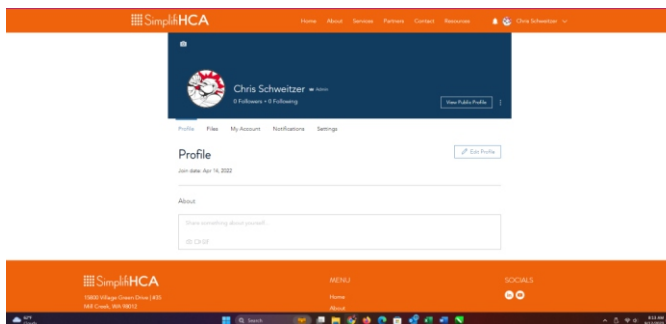
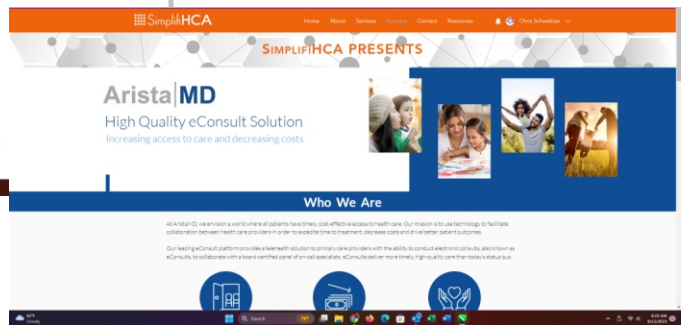
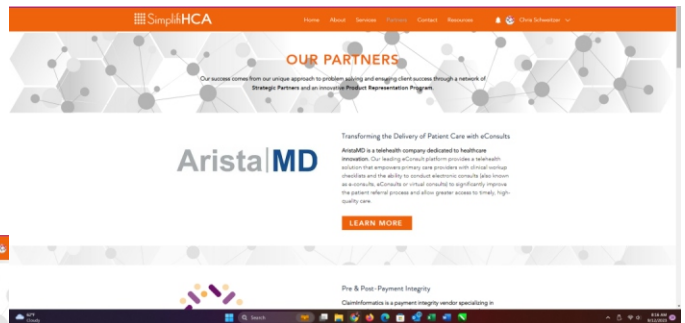
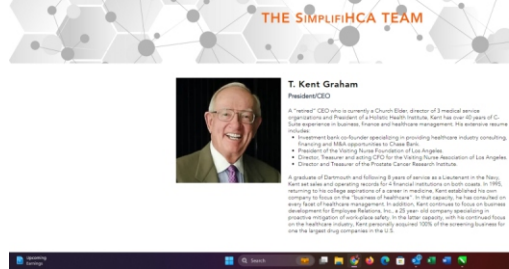
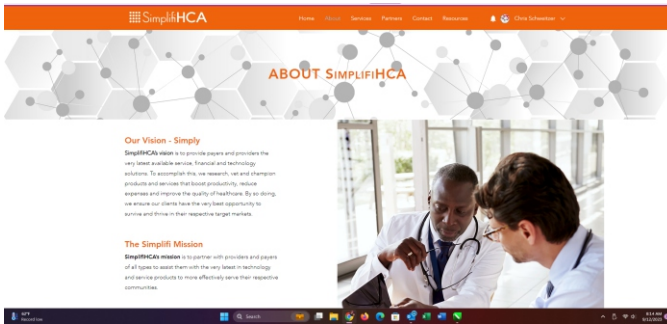
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**BRAND / IDENTITY**

Complete Brand Development including all the necessary elements for a full Brand Experience:

- Brand Key Exercise
- Message, Essence, Mission, Vision
- Logo Development
- Brand Standards
- Identity System
- Social Media Identity
- Best Practices Policy



## WEBSITE

Complete Website Development, including:

- Design/Build
- Content Creation
- User Experience (Consultants)
- Client Experience (Co-Branding)
- Web Master & Maintenance
- Social Media Coordination



## ONBOARDING PROCESS



### Mission

The SimplifiHCA (Health Care Advocacy) Mission is to partner with providers and payers of all types, providing them with the latest technology and services to positively address industry challenges.

- These capabilities must deliver innovative and effective solutions designed to specifically:
  - Improve patient outcomes
  - Improve workflow productivity
  - Significantly reduce expense

### Introduction

The goal of the SimplifiHCA Executive Consultant Onboarding process is to assist new team members with setting up their SimplifiHCA profile, providing access to resources and tools to maximize prospecting and sales efforts, and to establish an efficient, collaborative system of communication for all team members to enjoy mutual success.

This Onboarding document can be used as an organizational training manual to ensure that consultants' needs are being met in establishing their SimplifiHCA identity and accessing a variety of resources.

### RESOURCES FAQs

Visit Site Members with various aspects of the SimplifiHCA website, Partner assets.

Resources Page - Becoming a Site Member (exclusive to Site Members. This area contains assets and information developed to aid as part of the SimplifiHCA team. It can only be accessed once individuals are approved.)

Click the upper right corner of the menu bar. (This is the login screen for Site Members.)

Click the email address (last option). This will appear for you to enter your personal information into the required fields. Type prepared to use in conjunction with your email address.

After clicking the button, you will see a screen that indicates form submission. You will become a verified Site Member, with access to restricted pages.

What's New? This area contains all the latest news, updates, and announcements. Site Members have their own account, thereby improving their experience, adding and providing useful tools and assets.

Custom Profile: You have a unique Profile Page (visible to other Site Members) that you can customize for both look and function.

File Sharing: Assets of various types are available for use, customization and sharing among Members. You will have the ability to create your own file system within your Profile.

Contents of the Resources Page: The Resource Page of the website contains the following (for use/access by Site Members):

- SimplifiHCA Brochures and Collateral
- SimplifiHCA Graphics
- Identity
  - Standard Digital Identity Templates
  - Customizable Templates (Letterhead, Envelopes, Labels, etc.)
- Client Partner Resources
- FADs (Use of Folder and File System and Resource Page Content)

### Site Content and Resources

Chris Schkewitzer, Marketing and Communications Director, 614-581-6221, cros@simplici.ca.com

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### SimplifiHCA Identity

- Email Account
- Website Membership
- Onboarding One-On-One
- Business Cards
- Apparel

### Public Relations (Profile)

- Press Release
- SnapShot/Bio

### Partner Introduction

- Partner Materials
- Demos/Presentations
- Meetings



### PRESS RELEASE

Contact: Ken DeBella, Company, SimplifiHCA, Phone: 614-581-6221, Email: ken@simplici.ca.com

## FOR IMMEDIATE RELEASE – DECEMBER 1, 2022

### SALES/MARKETING EXEC, SANDY HARTMAN, JOINS SIMPLIFIHCA Health Advocacy Team Adds to Its Stabls of Leaders

SEATTLE, WA (Dec 02, 2022) – SimplifiHCA continues to add to its depth of expertise across healthcare channels by adding industry professional Sandra Hartman to its team. Hartman is a veteran sales professional with more than 30 years of experience in the health insurance industry, and viewed by her peers as a specialist in creating solid solutions for employer health plans. Joining the SimplifiHCA team will help showcase these skills in addition to her extensive sales abilities.

Hartman's versatility extends to all aspects of business development including prospecting, effective use of resources, lead qualification, closing sales and delivering success to customers in the healthcare arena. She is a recognized expert on subjects such as self-funding, reference-based pricing, capexes, cost containment tactics, onsite clinics and strategies to improve member health, reduce costs and deliver a high performance health plan.

"Sandy's skill set not only complements the abilities of our other execs, it brings an added level of experience to our team," says Ken DeBella, SimplifiHCA Founder | CEO. "We are excited to tap into those skills and help our clients grow their business while we share in their success."

(Insert Sandy quote here.)

Prior to starting her position at SimplifiHCA, Hartman was Regional Vice President of Sales for ValueHealth Benefit Administrators and Regional Vice President of Sales for Advanced Medical Pricing Solutions (AMPS). She was also Vice President of Sales for HealthScope Benefits (United Healthcare UMR) and President/Owner of Elevate Healthcare ROI. From 2015-2017, Sandy was President of the Workforce Employee Benefits Phoenix Chapter. SimplifiHCA is pleased to introduce Sandy. Contact us to schedule a meeting or virtual call.

Learn more at [www.simplici.ca.com](http://www.simplici.ca.com).

(Photo of Sandra Hartman Available Upon Request)

###

SimplifiHCA (Health Care Advocacy) is a privately held product representation firm that serves healthcare technology innovators, and is focused on providing TPAs, stop-loss/MCO's, hospitals, Accountable Care Organizations, and physician practice groups with the very latest technology tools to reduce health plan and member expenses, and improve patient outcomes.

### Simplifi SNAPSHOT:

**John Friend**, SimplifiHCA Executive Consultant and Vice President of Business Development | Recurs Health

- Specializes in building out-of-the-box solutions for self-insured employers.
- Assisted in building Direct-To-Employer programs for many health systems.
- Helped build proprietary SaaS product with Ringster Technologies in their Regional Vice President.
- Grew revenue 16% in his first year as Senior Vice President, Employee Benefits Practice Leader at Assured Partners (December 2020).
- Achieved personal production of Leaders Conference level (Top 5% of company (Assured Partners)).
- Built and managed Employee Benefits practice of over \$12 million in revenue as Senior Vice President of an Ohio-based regional company firm.



John is a passionate executive sales leader and CRM specialist with over 20 years of experience in both management and individual contributor roles. Skill sets include Master Technology Healthcare Software Consultant, Problem Solver, and Benefit Relationship.



### Our Executive Consultants

SimplifiHCA is proud to provide a stable of reputable Executive Consultants with decades of experience as both Buyers and sellers of products, services, and companies from all corners of the healthcare industry to represent our clients and best serve our shared interests.



Key Ven DeBart

Key serves as SimplifiHCA's Chief Operations | Strategy Officer, bringing over 30 years of healthcare experience. She has a record of demonstrated success with strategic planning, metrics, business, and financial marketing in hospitals, retail clinics, employee-based clinics, patient centered medical homes, population health, cardiovascular, mental, health-based wellness and fitness organizations. Key has an extensive reach with hundreds of colleagues and contacts. As a LEAN Six Sigma Green Belt, her passion for improving healthcare processes, efficiencies and implementing new innovations to reduce healthcare costs and improve patient care. With a keen understanding of the dynamic between healthcare operations and service providers, Key brings an additional layer of proficiency to an already highly experienced team of Executive Consultant and the Executive Team at SimplifiHCA.



Tom MacIntyre

Tom is a results-focused healthcare executive with over 20 years of leadership experience. Adept at capturing business opportunities within top insurance, TPA, PBM, Tom has consistently led large national accounts as a top producer, generating revenue growth and profitability through new product platforms and innovative solutions. Tom's breadth of competencies in strategic planning, sales, marketing, and sales strategies, coupled with his collaborative approach yields positive results and an expansive colleague | contact network.



Sandra Hartman

Sandra has worked in the health insurance profession for more than 30 years and is viewed by her peers as possessing the knowledge and experience to create solid solutions for employer health plans. She is a recognized expert on subjects such as self-funding, reference-based pricing, capexes, cost containment tactics, onsite clinics, and other innovative strategies to improve member health, reduce costs, and deliver a high-performance health plan. In addition, Sandra has extensive experience leading all aspects of business development including prospecting, effective use of resources, qualifying leads, closing the sale, and ultimately delivering customer success with their employee benefit program.



John Friend

John has more than 30 years of experience across numerous healthcare verticals. He is best described as a CRM strategy builder, a sales leader, master networker, cost containment specialist, executive partner and self-funder. Healthcare subject matter expert, the major focus and passion is to bring access to healthcare that is affordable and high quality in nature. John's passion and expertise network provides opportunities for partner and product synergy to solve healthcare challenges. John currently maintains a \$10 million sales pipeline, while closing \$5 million of new business and contributes to product innovation and development.



Rod McCann

Rod's 30-year career is very involved in sales in the capacity of Area Manager, Regional Sales Director, and the past 14 years, Director and Principal of Sales and Service Consulting. The latter promotes expertise in Self-Funded Employee Benefits, Sales & Marketing Management, Key Account Management and Brand Development. Prior focus has included expanding territory in Corporate, Union, TPA, broker and healthcare consulting, a top sales producer involving specialty pharmacy, managing pharmacy benefit sales for a large U.S. health company, and selling PBM operations with through MCOs, HMOs, and major health plan.



Executive Consultants with decades of experience as both Buyers and sellers of products, services, and companies from all corners of the healthcare industry to represent our clients and best serve our shared interests.



Debbie Rot

Debbie is a veteran sales professional with a proven track record of success over a 35+ year career in the industry. Debbie has built relationships, based on a foundation of trust and mutual agreement. A strong industry expertise, product knowledge and risk assessment skills, utilized in a consultative selling approach has led to successful and long-term business partnerships with employee benefit consultants, brokers, intermediaries, and 501(c)(3) administrators.



Steve Towns

Steve is a "senior" member of the SimplifiHCA community. Steve brings over 30 years of experience in a decisive sales specialist with deep expertise in stop loss business and other specialty employee benefits program business. Most recently he served as regional sales manager for a large mid-western company responsible for Stop Loss and Ancillary Product Sales. Prior to that, for over 15 years he achieved national success for sales results for three separate organizations, each of which is an industry recognized "top" in the healthcare industry. Steve has extensive experience in client relationships, strategic sales plans and problem solving. In addition, he also brings a "hands-on" mentality with a track record to achieve client and company goals while continuously improving performance and driving results.

- \$100+ Million general revenue across multiple operative channels
- 20+ Years of C-Suite Executive Leadership Experience

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Associate a public-private Employee Benefits | United Group. Active in civic and community affairs. Served as the President of the Stetson University Alumni Committee and Executive Board. In addition, he is a past Board Member and Co-Chair of the "Save Our Kids Golf Classic" to benefit Oakland Children's Hospital.



50+ Years combined post-graduate and continuing education / licensing experience

Responsible for \$10+ MILLION in Program Savings Across Multiple Organization Sites

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## TEAM MANAGEMENT

Team Management Best Practices developed with the Executive Team to provide team members with a complete tool kit to help them succeed, including:

- Consultant Onboarding Process
- Press Releases and Snapshots
- Biography/Personnel Promotions
- Employee Handbook





BEST-IN-CLASS SOLUTIONS FOR THE HEALTHCARE INDUSTRY

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Healthcare Advocacy Simplified

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Our Mission is the Success of Our Healthcare Advisor Partners.

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How Do You STAND OUT in the Very Crowded Field of Healthcare Advisors?

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Our Partners

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HOW CAN WE HELP?

BEST-IN-CLASS SOLUTIONS FOR THE HEALTHCARE INDUSTRY

A SERVICE PORTFOLIO CUSTOMIZED FOR EVERY PARTNER

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LITERATURE / COMMUNICATIONS

- Institutional Communications and Promotional Literature, including:
- Pocket Folder
  - Rack/Envelope Inserts
  - Brochures
  - Folio-Sized Summaries

### ONBOARDING PROCESS

Icons representing onboarding steps: handshake, gear, calendar.

### Vision

**SimplifiHCA (Health Care Administrators) identifies healthcare partners who possess capabilities to positively address industry challenges.**

These capabilities must deliver innovative and effective healthcare technology solutions designed to specifically:

- Improve patient outcomes
- Increase workflow productivity
- Significantly reduce expenses

By doing so, we create our clients the very best opportunity to grow and thrive in their respective target markets.

### Introduction

The goal of the SimplifiHCA Partner Onboarding process is to establish an efficient, collaborative network of communication for all team members involved in our mutual success.

This includes development and maintenance of a dynamic, comprehensive catalog of onboarding resources and assets for all team members to reference and incorporate into their sales and prospecting efforts. Items of these assets are attached and defined in this document.

This Onboarding document can be used as an organizational training method to ensure that both companies' needs are being met with best practice and ongoing collaboration as programs and campaigns are developed and implemented. (Items noted within the documents listed and their respective areas where needed are delineated or table completed.)

- Brand Standards 3
- Brand Messaging 3
- Collateral 4
- Website 4
- Email Campaigns 5
- Social Media 5
- Trade Shows 6
- Telemarketing 6
- Additional Services 7

### Branding

Essential to effectively representing our clients is understanding their brand.

Before on-boarding assets and resources, providing our marketing and communications asset of contact with Brand Guidelines or Brandbook is important so that the project team can be placed on graphics and messaging.

Once requested and reviewed, a necessary will be provided to SimplifiHCA Producers Executive Sales Team to ensure quality control throughout the relationship.

#### Brand Standards

- Brand Graphic Guidelines
- Logos, Trademarks and/or Logomarks
- Typography
- Color Palette(s)
- Iconography
- Brand Elements, Symbols and/or Graphics

#### Specifications/Provisions

Any regulatory documentation may be provided in electronic readable format in suitable PDF (Word document, Microsoft presentation, etc.) depending upon client requirements.

All applicable image files must be provided in suitable file format (e.g. Adobe Illustrator, etc.)

Image: EPS, AI, PDF, CDR, InDesign, etc. (300, 600, 3000)

#### Brand Messaging

- Value or Usage Guidelines
- Mission Statement
- Vision Statement
- Company Profile or Summary

#### Specifications/Provisions

Any regulatory documentation may be provided in electronic readable format in suitable PDF (Word document, etc.)

### Additional Services

**SimplifiHCA understands the need for effective, quality communication and powerful marketing and promotional to support it. At the end of the day, we realize that business owners often do not have the time or resources to fully use expertise to design, develop and implement marketing and advertising plans.**

- Ideation/Concept Development
- Brand Experience and Messaging
- Strategy Development
- Campaign Creation
- Implementation (Assets and Channels)

**Igniting Performance...SIMPLY.**

By engaging SimplifiHCA Marketing and Communications services, the result will be optimal brand experience, enhanced marketplace exposure, and targeted growth.

We will utilize decades of experience and award-winning services to optimize your business and services in the most effective ways, to specific demographics and audience best served by what you do.

Your Direct Communications Contact:  
Chris Schwartz  
Marketing and Communications Director  
chris@SimplifiHCA.com

### Claim Informatics

Proprietary Technology That Can Save Your Employers 3-25%

Pre & Post-Payment Integrity Software Plans and Their Members

### Our Proprietary CLAIMINTELLIGENCE™ Platform

The Engine For Claims Review, Analysis and Adjudication

Automated Platform w/100% Proprietary Edits

CI Captures 5X Industry Average in Findings

CI Platform is Easy to Implement and Master

Simplifies and Expedites Review and Adjudication

100% Claims Analyzed, 75% Audit Speed, 600+ Automations, 100% Removal Rate

### SAVING YOU 5-25% OF YOUR HEALTHCARE SPEND

**THE PROBLEM** Health Plans Are Facing a TRIPLE THREAT

- RISING HEALTHCARE COSTS
- INCREASING IMPROPER PAYMENT RATES
- ERISA RISKS

**THE SOLUTION** Payment Integrity THAT WORKS FOR YOU

Our State-Of-The-Art ClaimIntelligence™ Platform is Unparalleled

- 100% OF CLAIMS: Every Claim - Pre and Post Payment - is Reviewed
- CONTINUOUS IMPROVEMENT: Catches Fraud, Waste, Abuse and Mistakes at 5X Industry Average
- EPISODE OF CARE LOGIC: Identifies Claims Where Incorrect Codes are Billed

100% ROI GUARANTEED | 5X INDUSTRY AVERAGE | 100% CLAIMS REVIEWED

Pre & Post-Payment Integrity Software Plans and Their Members

Begin Preventing & Recovering Improper Payments Today

Featuring Our ClaimIntelligence™ Platform

100% ROI GUARANTEED | 5X INDUSTRY AVERAGE | 100% CLAIMS REVIEWED

### Pre & Post-Payment Integrity

To Protect Healthcare Plans and Their Members

REPRESENTED BY

For More Information Contact Us Today: We Ignite Healthcare Performance

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### CO-BRANDING

Working with Client/Partners to fully develop their brand and services beneath the Simplifi umbrella for maximum exposure and representation:

- Onboarding and Best Practices
- Literature and Communications
- Tradeshows Presence
- Webinars and Digital Media
- Presentations



**Creative Design Solutions**

119 Lone Elk Court • Pickerington, OH  
ph: 614.920.3776 • fax: 614.920.4881

**Creative Design Solutions specializes in Brand Creation and Marketing Development through Design strategies.**

**Previous examples are only a small sample of the award-winning work we've done for a vast array of clientele. Please contact the studio for more.**

**P O R T F O L I O**

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“ Part of the process of **choosing the best** involves knowing **who can knock on a door** and **who can knock it down...**”

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Award-Winning *Creative Problem Solving*  
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