

REDACTED VERSION OF DOCUMENT

VISION DOCUMENT

February 2023

PROJECT *****

UPDATED: April 19, 2023

Author: JS
Location: [REDACTED]

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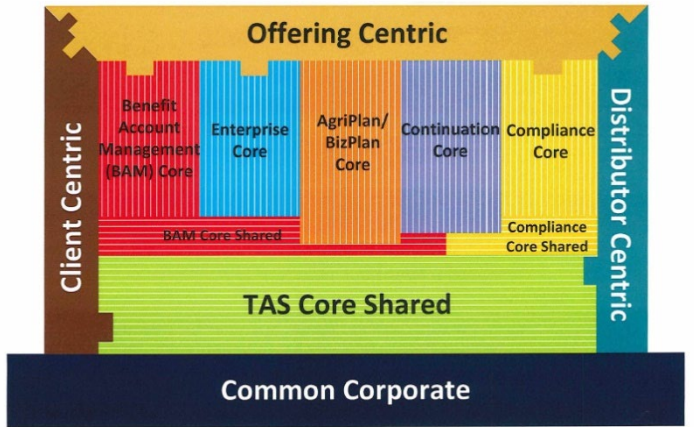
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WHAT

██████████ is an online, e-commerce distribution channel for ██████████ and its service model's Benefit Account Management, Continuation, Compliance, and Payroll, targeting employers with less than 200 employees.

We'll continue to go after our sweet spot first of small businesses and offer Compliance & Continuation services online. Of our current clients with this service offering, 80% have 50 or less employees, which fits our hypothesis of targeting smaller businesses who are looking to self-serve and purchase compliance or continuation services online.

██████████ will follow ██████████ Shared services for process and financial management, and when/if a process does not fit, we will turn to Premium Services.



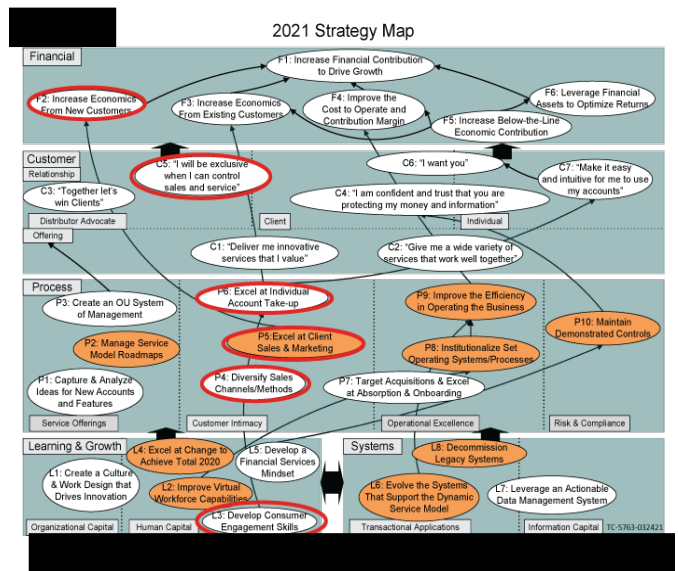
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A competitive research study found limited competition for online Compliance and Continuation Services. The two competitors found where ██████████, both of which do not compete with ██████████ on price or overall product strategy. ██████████, as an entity and product channel strategy, will be unique to the industry and a key differentiator in our small B2B market.

With the broker distribution channel consolidating as a market trend, and more consumers choosing to shop online, we believe an online channel offering our services has a tremendous amount of opportunity.

WHY & OUTCOMES

- Our recommendations for ██████████ Phase II are based on the MVE lessons learned and tie back to corporate and strategic goals of the organization. Strategic objectives: L3, P4, P5, P6, C5, F2.
 - We will learn and focus on the following outcomes:
 1. Understand consumer behaviors for the purposes of ██████████.
 2. Increasing traffic, decrease bounce rate, and increase conversion rate from a lead to a sale.



3. We need to attract and drive the right audience to the website (i.e., employers vs. employees).

CURRENT /PAST OVERVIEW

██████████ MVE was launched in June 2022 with the following tactics executed:

- A digital marketing campaign, leveraging keyword search and paid ad placement on Google and Bing (92%) and display ads on Google Display Network (8%);
- Weekly email blasts to a paid list of persons in an HR, CEO, or financial role in an organization;
- LinkedIn and Facebook social posts;
- 1 – 2X a week original blog posting written by TASC;
- Reposting same original blogs to 20 different HR and Compliance social groups on both Facebook and LinkedIn.
- Social and digital marketing included Compliance Poster(s) give-away (generating 12 leads).

We've had one sale on ██████████ in October for Compliance Notices, selling for \$623. With that sale, we had a number of learnings within the product/sale workflow and onboarding. In addition, we now have 6 months of digital marketing statistics to determine when/if a pivot is needed.

The email drip campaign was set-up to send 6 different emails to a paid list of business professionals. We saw an average open rate of 10% and a click-thru rate of around 5%. As a reference point, the industry benchmark for finance is around 22% open rate, and Click-thru rates is .72%, so we're doing well on CTR but only achieving 50% of open rate. These averages are to be expected.

Currently, we're using the e-commerce tool, Magento, but we've found it is largely dependent upon development resources to update and make simple changes which historically have been owned by the business. The website is ranking well for e-commerce, but not for content, which puts at a lower ranking on search engines.

The ██████████ project owners have also been shuffled around, but Steve R. was able to successfully launch and MVE in 6 months and prove-out the concept. ██████████ currently resides within the Sales Initiative, Dawn M. as the Executive Owner, and those responsible are Steve Radlinger and Jessie Small.

WEBSITE & DIGITAL MARKETING STATISTICS

We allocated, roughly, \$2000 per month for 6 months on digital marketing. The website statistics and digital marketing efforts are below, but what are the high-level takeaways?

We've had Google Analytics running from Day 1 under the name, "[REDACTED]" but later implemented a better approach to tracking in November of 2022 with the names, "[REDACTED] GA4 [REDACTED]." The term GA4 is short for the new version of Google Analytics that will replace current version running by Google.

We're getting traffic, oddly more traffic through BING than Google, but we're seeing a very high bounce rate at 67% (ideally you want a bounce rate between 25 – 40%). A high bounce rate means that the landing experience is not meeting your visitor's expectations and/or the wrong audience is visiting the site.

Bing delivered on impressions, but Google had a higher Click-thru Rate (CTR). From Oct. to Dec. traffic and sessions decreased, Cost per Click (CPC) increased, but Click-thru Rate (CTR) and pageviews grew suggesting we were potentially getting 'better' traffic. At this time, we were implementing exact phrasing in our paid ad placement, and we believe as a result, we got our first sale.

Average Web & Marketing Statistics

Website Traffic Stats	Average per Month
Total Users per mo.	965
New Users per mo.	949
Bounce Rate per mo.	67%
Stickiness per mo.	31.5 secs

Paid Digital Marketing Stats	
Overall spend for 6 mos. (minus 25% for Mlive services)	\$13,640

Impressions	Average per Month
Total	215,407
Google	12%
Bing	88%

Click Total	Average per Month
Google	19%
Bing	81%

Click Thru Rate (CTR)	Average per Month
Google	2.41%
Bing	1.82%

Cost Per Click	Average per Month
Total	\$4.58
Google	\$3.67
Bing	\$4.62

Traffic Source	Average Users per Month	Bounce
Paid Search ¹	576	57%
Display ²	142	95%

Organic Social ³	14	30%
Direct ⁴	165	72%
Organic Search ⁵	19	51%

Operating System	Average per Month
Windows	72%
Linux (Desktop)	19%
Desktop %	70%
Mobile Device	Average per Month
Android	49%
iOS	51%
Mobile %	30%
Browser Type	Average per Month
Chrome	72%
Edge	11%
Safari	16%

MARKETING STATISTICS FOOTNOTES

- 1 Ads that are displayed in Google or Bing Search based on keyword query entered
- 2 Ads shows on articles, videos or websites that are part of the Google Display Network.
- 3 Visitors from [REDACTED] LinkedIn and Facebook page – as a result of social posts in general or posting to Groups
- 4 Visitors that are aware of [REDACTED] and type the URL in the URL field in their browser.
- 5 Links to [REDACTED] displayed in a Google or Bing keyword query based on SEO.

E-COMMERCE COMPETITORS

- [Compliancebug.com](https://www.compliancebug.com)
- [CoreDocuments.com](https://www.coredocuments.com)
- [COBRAAdminOnline.com](https://www.cobraadminonline.com)

DIRECT SALES & CUSTOMER SUPPORT for TASCshop

- There is a direct phone line and queue ([800-272-6414](tel:800-272-6414)) set-up exclusively for [REDACTED], along with an email address, [REDACTED]. We use [REDACTED]@gmail.com for the purposes of logging into external tools where the sole purpose is [REDACTED] and multiple people may access the inbox (if necessary).

BUDGET & MEASURES

With the help of our marketing vendor, we've developed a strategy, budget, and tactics that will achieve the objectives and outcomes defined by our strategy map. The following Summary of Budget & Projections document shows the projected costs, revenue, and ROI with the recommended tactics to achieve our outcomes.

- [Summary of Projected Budget & Outcome](#)
- [MLive Digital Marketing & Content Proposal](#)

- [Mlive Web Development Proposal](#)

INVESTMENT PORTFOLIO IN-TAKE FORMS FOR GOOD, BETTER, & BEST

This information is based on the Good, Better, and Best proposals from Mlive.

GOOD

Upfront investments				Benefits after completion of the project																																												
Internal Mindshare	hrs	rate	\$costs	Year 1	Year 2	Year 3	Year 4	Year 5	Total																																							
Executive		\$	\$																																													
Staff		\$	\$																																													
Staff		\$	\$																																													
Total Internal Mindshare		\$	\$																																													
External Costs																																																
Mlive Marketing Firm			\$																																													
Total External Costs			\$																																													
Total investment			\$																																													
				Additional Sales Production																																												
				Persistence improvements																																												
				(Reduction)increase to C20, C2S, Miscellaneous:																																												
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aj	Total Improvement to Below the Line	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -																																								
Calculation of the IRR, NPV and Payback Period																																																
Additional Revenue				Year 0	Year 1	Year 2	Year 3	Year 4	Year 5	Total																																						
Incremental Increase/(Decrease) from new sales production																																																
Incremental Increase/(Decrease) in existing revenue																																																
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Cost to Run/Maintain																																																
Cost to Re-Sell																																																
Cost to Operate - base line																																																
(Reduction)/increase to Cost to Operate, Cost to Sell and Miscellaneous (from above af)																																																
Total impact to C20 (positive is increase, negative is decrease)																																																
Below the line Economics - base line (because it's a reduction to expense - negative means improvement to BTL)																																																
Improvement to Below the Line Economics																																																
Total Impact to Below the Line Economics																																																
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Cost to Sell (commissions and incentives. Direct costs are NOT included here)																																																
Pre Tax Cash Flow																																																
Tax																																																
Net Cash Flow																																																
Residual Value - 4 x earnings, net of tax																																																
Cumulative Cash Flow																																																
Internal Rate of Return					17.1%																																											
NPV - 4% discount rate																																																
Payback Period (yrs)					6.00																																											

BETTER

Upfront investments				Benefits after completion of the project					
Internal Mindshare	hrs	rate	\$costs	Year 1	Year 2	Year 3	Year 4	year 5	
Executive									
Staff									
Staff									
Total Internal Mindshare			\$ -						
External Costs									
Mlive Marketing Firm									
Total External Costs									
Total Investment									
				z Additional Sales Production					
				aa Persistency improvements					
				(Reduction)/increase to C2O, C2S, Miscellaneous:					
				ab					
				ac					
				ad					
				ae					
				af Total Reduction/(increase) to C2O					
				Improvement to Below the Line:					
				ag					
				ah					
				ai					
				aj Total Improvement to Below the Line	\$ -	\$ -	\$ -	\$ -	\$ -

Calculation of the IRR, NPV and Payback Period							
Additional Revenue	Year 0	Year 1	Year 2	Year 3	Year 4	year 5	Total
Incremental Increase/(Decrease) from new sales production							
Incremental Increase/(Decrease) in existing revenue							
Total Increase/(Decrease) in Revenue							
Cost to Run/Maintain							
Cost to Re-Sell							
Cost to Operate - base line							
(Reduction)/increase to Cost to Operate, Cost to Sell and Miscellaneous (from above af)							
Total impact to C2O (positive is increase, negative is decrease)							
Below the line Economics - base line (because it's a reduction to expense - negative means improvement to BTL)							
Improvement to Below the Line Economics							
Total Impact to Below the Line Economics							
Total Impact to Cost to Run/Maintain							
Cost to Sell (commissions and incentives. Direct costs are NOT included here)							
Pre Tax Cash Flow	\$						
Tax							
Net Cash Flow	\$						
Residual Value - 4 x earnings, net of tax							
Cumulative Cash Flow	\$						
Internal Rate of Return							28.3%
NPV - 4% discount rate							
Payback Period (yrs)							5.74

BEST

Upfront investments				Benefits after completion of the project					
Internal Mindshare	hrs	rate	\$costs	Year 1	Year 2	Year 3	Year 4	year 5	
Executive									
Staff									
Staff									
Total Internal Mindshare									
External Costs									
Mlive Marketing Firm									
Total External Costs									
Total Investment									
				z Additional Sales Production					
				aa Persistency improvements					
				(Reduction)/increase to C2O, C2S, Miscellaneous:					
				ab					
				ac					
				ad					
				ae					
				af Total Reduction/(increase) to C2O					
				Improvement to Below the Line:					
				ag					
				ah					
				ai					
				aj Total Improvement to Below the Line	\$ -	\$ -	\$ -	\$ -	\$ -

Calculation of the IRR, NPV and Payback Period							
Additional Revenue	Year 0	Year 1	Year 2	Year 3	Year 4	year 5	Total
Incremental Increase/(Decrease) from new sales production							
Incremental Increase/(Decrease) in existing revenue							
Total Increase/(Decrease) in Revenue							
Cost to Run/Maintain							
Cost to Re-Sell							
Cost to Operate - base line							
(Reduction)/increase to Cost to Operate, Cost to Sell and Miscellaneous (from above af)							
Total impact to C2O (positive is increase, negative is decrease)							
Below the line Economics - base line (because it's a reduction to expense - negative means improvement to BTL)							
Improvement to Below the Line Economics							
Total Impact to Below the Line Economics							
Total Impact to Cost to Run/Maintain							
Cost to Sell (commissions and incentives. Direct costs are NOT included here)							
Pre Tax Cash Flow	\$						
Tax							
Net Cash Flow	\$						
Residual Value - 4 x earnings, net of tax							
Cumulative Cash Flow	\$						
Internal Rate of Return							34.8%
NPV - 4% discount rate							
Payback Period (yrs)							4.96

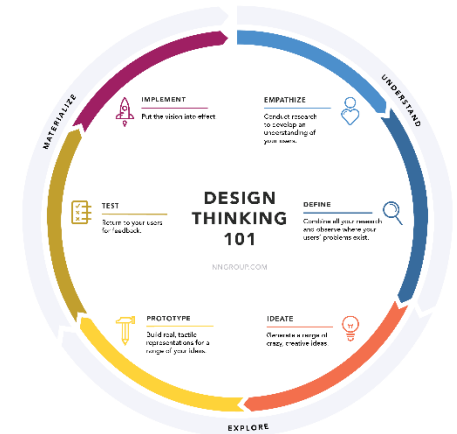
SALES INITIATIVE MEASURED OUTCOMES

Focus Area	Measure(s)
Pre-sale (Digital Marketing)	
	Paid Search (Google & Bing) impressions
	Paid Search (Google & Bing) click-thru to website
	Number of business assessments completed
	Subscriptions to blog
	Digital download and email addresses collected for leads (those who do not convert)
Pre-sale Hot Lead	
	Number of calls to direct sales from [REDACTED] website
	App started, but not submitted/finished
Post-sale	
	Apps started and purchase process complete
	Amount of money collected from sales

RECOMMENDATION OF WHAT'S NEXT

1. Conduct a user experience research study

- a. Staying true to the Design Thinking process and framework, adopted by [REDACTED] for successful innovation, we jumped ahead and left behind the Understand Phase. When we understand our customer, we can be effective and anchor back to key design principles and methods.
- b. We'd like to conduct a semi-structured user experience research study in the form of a controlled, live user interview and an online survey. Having two research methods will allow for us to effectively triangulate qualitative and attitudinal data to test the validity of our ideas.
- c. We're seeking a stratified sampling, but focused on businesses who have under 200 employees and a representative that holds a professional role in HR and a Finance making benefit decisions. If we have 25 respondents, we'll consider that a



Design Thinking Principles from the NN/g Nielsen Norman Group -- World Leaders in Research-based User Experience. An innovation process & framework adopted by [REDACTED]

success, but knowing we only need 12 respondents to get a solid representation of the population (unless the results are saturated).


d. On February 21st, we sent an email along with the links that follow to 2,100 non-██████ customers.

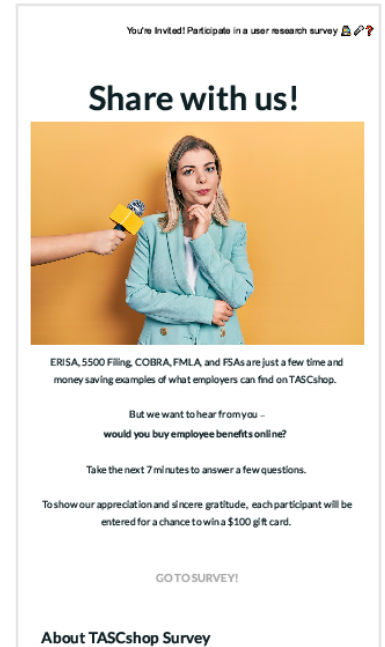
- i. About: <https://www.██████.com/ux-research>
- ii. Survey: <https://www.██████.com/user-research-survey>

e. Our research goal is to ask questions about:

- i. What are their motivations of purchasing benefits
- ii. What value does shopping online for benefits bring to them?
- iii. What mental models and/or assumptions do they currently have?
- iv. Can we change their behavior to purchase benefits online, now or in the future?

f. Research Results

- i. Alchemer & Pollfish results:  ████████ [Survey Results.pptx](#)
- ii. Other options to consider if continued research is necessary: [UX Research Next Steps Decision Matrix](#)



Email sent to non-customers with link to survey for the purposes of UX Research for the ████████

2. Simplify the product offerings available on ████████

a. Currently, we offer 16 products on ████████, we'd like to reduce and simplify the offerings available to reduce the complexity of the purchase on both the buyer side thus reducing the need to answer questions.

NOW	NEXT
1) COBRA	1) Premium Only Plan (POP)
2) Retiree Billing	2) Small Business Benefits Package (including Dependent Care Assistance Plan, Limited Purpose FSA, Limited Scope FSA, FSA, Health Savings Account)

3) ERISA	3.) 5500 Current or Amended Form
3) ERISA Plan Doc Only	4.) COBRA
4) ERISA Individual/Separate Affiliated Employer Wrap Document	5.) ERISA Wrap
5) ERISA Medicare Part D Notice	
6) PCORI	
7) FMLA	
8) ACA Employer Reporting - Single ALE Employer	
9) ACA Employer Reporting - Non-ALE Employer (Self Insured Plans)	
10) HIPAA	
11) 5500 Current or Amended Form	
12) NDT - Group Term Life	
13) NDT - Self Insured	
14) Dependent Eligibility Verification	

6.) Decommission Magento and move to Wordpress as the tool but continue to use BrainTree/PayPal as the processing payment solution.

- a. As it was stated above, the website is ranking well with Google and Bing as an e-commerce website but not for content. You need to rank in both for Google/Bing to present your website as an option to consumers. With the product pages heavy in content, the digital ads sending straight to the product pages and a high bounce rate, our hypothesis is that with a new tool, new product page design, and the appropriate meta data/tags set-up correctly, we'll see this correct quickly.

- b. Moving to an enterprise-approved tool, Wordpress, the business has more control, speed, reduced development needs/costs, and a larger pool of resources to maintain and update.
- c. Moving to Wordpress will allow us to put *** within the eco-system of [REDACTED] to leverage the existing search engine ranking and boost the presence of [REDACTED] on search engines (i.e., Google, Bing).
- d. Magento is typically used by large organizations (e.g., Nestle, Ford, Vizio, Landrover, Jaguar, Bjorn, Olympus) managing large inventories, who move a lot of products with many dedicated teams/resources. We believe the tool is mismatched for the [REDACTED] purposes and on-going resources expected to maintain the tool.

7.) Redesign for engaging content, product pages, and efficient check-out workflow

- a. With qualified leads coming in, the website needs to be ready with engaging content that assists in decreasing the bounce rate and increasing conversion rates. With the flexibility to change the lures, and the business in control of the tool, the lures can be easily changed and include offering 1, 2, or 3-year contract terms, intuitive pricing, leveraging short-term promotions, or offering a customer to put a deposit down vs. the whole payment.
- b. Add BAM in a Box to add to the services offered, attract more qualified leads, and provide us, with what we believe, will be quick wins to test the process.
- c. Detailed wireframes are focused on effective information architecture, a process for qualifying and recommending products within the product pages, and effectively designing a check-out workflow that is smart, easy, and fast.
- d. With Google Analytics enabled on each page/interaction, we will learn more about the customer's journey through the web experience. A lot of the metrics on the current website is employees vs. employers, so the data is skewed to accurately represent an actual employer click-thru rate.
- e. With the appropriate tools in place to capture consumer data, we will learn about market segmentation, specifically the online market, consumer behavior (e.g., what's compelling to purchase online: convenience, price, time, 1 year contract etc., no broker relationship, or does a customer need assistance to purchase Compliance products vs. BAM?)
- f. With tagging and indexing applied correctly, search engines (i.e., Google, Bing) will be effectively index for search engine optimization. This will qualify the consumer (we want employers, not employees) searching and therefore ad placement will be more accurate, resulting in more click-thru's, and bounce rate will decrease.
- g. An opportunity for an individual to complete a business assessment will enable a consumer to walk through a series of questions to determine their compliance. We could consider

including questions similar to what is within the [REDACTED] (old) asks within the Compliance Dashboard.

8.) Restructure Pricing, offer additional options for contract terms, to allow for flexibility in promotion tactics and pricing/discount offers

- a. Create a pricing structure that is consistent across the product lines in logical increments so it's easy for the consumer to calculate how they'd be charged (i.e., 1 – 10 employees, individual count = \$X.XX).

i. Recommended Pricing Structure

- b. If reviewing the Pricing Structure excel spreadsheet, in order to calculate discount options for the [REDACTED], we calculated a modified Variable Contribution Margin (“VCM”) percentage that included Cost to Acquire as a variable cost and recalculated a baseline VCM percentage. Then, we removed Cost to Acquire and Cost to Resell expenses from the variable cost and added back \$125,000 of [REDACTED] variable costs to create an updated VCM percentage. The average price was then discounted until the updated VCM percentage matched the modified VCM percentage. The percentage change in the average price is the discount offered on the [REDACTED] pricing. As a result, we may offer a 10% discount for BCS offerings and a 20% discount for BAM and Compliance offerings without affecting VCM. Our VCM percentage, profitability and pricing is subject to a 3-year contract and will be pro-rated for [REDACTED] clients who select a 1- or 2-year contract.
- c. Collect a % of the total cart or X dollar amount as a deposit vs. collecting the full cart total. After the onboarding call, the full price of the products will be charged to the card less the deposit amount. This will de-risk the consumer experience but still have skin in the game.
- d. Offer contractual terms of 1 (with auto-renew), 2, and 3. This will create greater flexibility in campaigns that focus on short-term promotions and discounts to drive traffic/increase conversions.

GROUPING A	GROUPING B	GROUPING C
ERISA	ERISA	ERISA
HIPAA	HIPAA	HIPAA
		ACA
	FMLA	Reporting
		PCORI

- e. We may experiment with a membership style pricing model for Compliance Suite and advertise as a “set-it and forget-it” type service and administration. Product suites, such as:

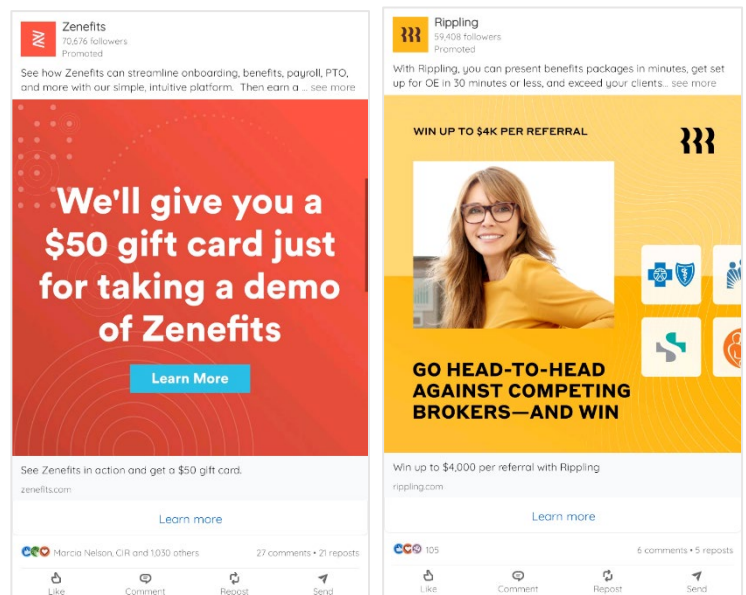
9.) Double-down on digital marketing campaign

a. Paid Search

- i. Paid Search is a great tactic to use, and will continue to use, but we need to further refine exact-phrasing keywords to attract a lot more employers and a lot less employees. We found a lot of traffic, early on, came from employees searching for COBRA and FMLA products/services. So, an update in this strategy would mean getting better exact phrasing that an employer is more likely to use. For example, exact phrasing looks like this - 'best fmla compliance management or 'buy ERISA administration online', which also suggests intent. When our customer bought ERISA Compliance - Full Administration, her exact phrasing was ‘buy erisa health plan online’ and ‘buy erisa filing requirements’, which exactly matched the key phrases we built into the ad campaign.

b. Geotargeting

- i. With a larger budget, geotargeting ads can be placed based on conferences location. We can target attendees at a specific show with ads before, during, or after the conference. There are about 15 shows that we’d recommend where we’d implement geotargeting.



c. LinkedIn, Facebook, and Instagram Social Campaign

- i. This tends to be a higher cost, but LinkedIn does a great job at providing highly qualified and targeted leads. We’d build an ad campaign that allows us to target our desired audience by job title, company and industry. Combined with compelling and relevant content, from blog articles and infographics to webinars and white papers, we can do a better job attracting interest and engagement with our ideal customers. This results, typically, in better conversion rates with a smaller audience of more qualified prospects. Another approach is then leveraging LinkedIn engagement data to target B2B customers on Facebook &

Instagram. We're recommending a monthly budget of \$2500 - \$3000 that reaches nationwide except ND and West Virginia. (we need to determine with Mlive if this cost includes content creation?)

- ii. Another LinkedIn tactic would be via in-feed Lead Gen ads which could offer incentives from content downloads (e.g., infographics) to offers. Rippling and Zenefits are two examples. A [Document Ad](#) is another example.

d. Content Development Targeting

- i. The success of any marketing is dependent on compelling relevant content. This is especially true for social – whether non-paid postings or paid promotion of same – where rich content drives awareness, engagement and lead generation (vs. intent in search). It is critical that we have the resources, whether internal or external, to create a sustained, constant pipeline of content aligned with a highly frequency document schedule (ideally 2-3 posts of original and re-purposed content per week). a week of new original content. As noted, the schedule would include re-purposed content that will likely be done

internally but getting a review from Mlive is important to

Zenefits & Rippling LinkedIn ads above are examples of Doc Ads and would be examples of the proposed social marketing tactics.

ensure consistency and

relevancy in messaging and style/branding, across all forms, is maintained.

e. Email Campaigns

- i. We highly recommend email campaigns, but it may be more cost effective for [REDACTED] to manage the delivery of the email/messaging. Mlive would assist in developing the template, making sure the content is on brand, and the CTA is appropriate.
- ii. Re a paid list of email addresses, it can be difficult to find highly quality, accurate lists, therefore our focus in this regard will likely be targeting Professional and Industry Associations.

f. Search Engine Optimization

- i. Over the 6-month trial nearly 25% of traffic came from organic queries (non-paid channels). Organic traffic typically has lower bounce rates & higher engagement, (more page views, higher stickiness) and ultimately a lower CPL in the long run. For now, paid search, social, and content, are the priority for cost outlays to generate interest/sales but SEO will still be employed as aggressively as possible leveraging best practices & internal resources. We may want to consider putting [REDACTED] under [REDACTED] to leverage the history and organic search that's already established for [REDACTED].

BUSINESS ASSESSMENT – HOW MIGHT WE ...

1. **How might we ...** Make it easy for me (Broker) to assess my clients and their employee's needs and offer [REDACTED] benefits that attract, retain, and reward my client's employees and their families.
2. **Target Audience:**
 - a. Broker – Trailblazer
 - b. Client – Value Champion
3. **Ideas:**
 - a. Simplify [REDACTED] offering presentation that's presents only the UBA accounts that match my clients value(s), focus, and business priorities (attract, retain, and/or reward).
 - i. Similar to the Compliance quiz, is there a Needs Assessment that could be built and shared across sales?
4. **Customer Interviews –**
 - a. PAC members?