

**I. Individual (potential customer – both group and consumer)**

**A. Learn about health insurance**

1. LEARN ABOUT HEALTH INSURANCE IN GENERAL
2. LEARN ABOUT MY PROVINCIAL HEALTH PLAN COVERAGE
3. LEARN ABOUT SHOPPING FOR ADDITIONAL HEALTH INSURANCE
4. DETERMINE WHAT MY HEALTH INSURANCE NEEDS ARE
5. DETERMINE IF I NEED ADDITIONAL HEALTH COVERAGE
6. SEE WHAT IS HAPPENING IN THE INDUSTRY
7. FIND HEALTH/WELLNESS INFORMATION
8. LEARN ABOUT MANAGING MY HEALTH INSURANCE PLAN

**B. Learn about ABC Health's personal plans**

1. READ ABOUT THE PLANS ONLINE
2. DOWNLOAD PRODUCT LITERATURE
3. REQUEST PRODUCT LITERATURE

**C. Learn about ABC Health's group benefits**

**D. Learn about ABC Health's services**

**E. Select an appropriate personal plan**

1. DETERMINE MY BROAD HEALTH INSURANCE & COVERAGE NEEDS
2. IDENTIFY A SUITABLE PLAN
3. CHOOSE MY PLAN OPTIONS AND LEVELS OF COVERAGE

**F. Get a quote for a personal plan**

**G. Apply for a personal plan**

**H. Find a consultant or broker to confer with**

**I. Learn about ABC Health**

**J. Subscribe/unsubscribe to ABC Health's e-newsletter**

**K. Read ABC Health's newsletters**

**L. Comment on web site or service**

## **II. Individual (current customer – both group & consumer)**

- A. Learn about my plan & how to manage it effectively
- B. Learn about ABC Health's policies and procedures
- C. Learn how to use this tool
- D. Check my claims status
- E. Submit a claim
- F. Check my benefits status
- G. Submit a claim
- H. Change my coverage
- I. Change my personal information
- J. Subscribe/unsubscribe to ABC Health's e-newsletter
- K. Talk to someone about my policy
- L. Find a nearby health services provider
- M. Read ABC Health's newsletters

## **III. Individual (potential employee)**

- A. Find out what positions are available
- B. Apply for a position
- C. Learn about ABC Health
  - 1. FIND OUT WHAT ABC HEALTH MIGHT BE LIKE TO WORK FOR
  - 2. FIND OUT WHAT EMPLOYEE BENEFITS ABC HEALTH OFFERS
  - 3. FIND OUT IF ABC HEALTH HAS BEEN IN THE NEWS RECENTLY
  - 4. FIND OUT WHAT ABC HEALTH'S FUTURE PLANS ARE (SHORT & LONG TERM)
- D. Subscribe/unsubscribe to job openings mailing list, e-newsletter

#### **IV. Group (potential sponsor)**

##### **A. Learn about group benefits**

1. LEARN ABOUT SPONSORING A PLAN & BEING A PLAN ADMINISTRATOR
2. LEARN ABOUT SHOPPING FOR GROUP BENEFITS
3. SEE WHAT IS HAPPENING IN THE INDUSTRY
4. FIND HEALTH/WELLNESS INFORMATION

##### **B. Learn about ABC Health**

1. FIND OUT ABC HEALTH'S CREDENTIALS
2. FIND OUT IF ABC HEALTH HAS BEEN IN THE NEWS RECENTLY
3. FIND OUT WHAT ABC HEALTH'S FUTURE PLANS ARE (SHORT & LONG TERM)

##### **C. Learn about ABC Health's group benefits products**

1. READ ABOUT GROUP BENEFIT PRODUCTS ONLINE
2. DOWNLOAD PRODUCT LITERATURE
3. REQUEST PRODUCT LITERATURE

##### **D. Learn about ABC Health's group benefits services**

##### **E. Design an appropriate group benefits package**

1. DETERMINE MY BROAD HEALTH INSURANCE & COVERAGE NEEDS
2. IDENTIFY A SUITABLE PLAN
3. CHOOSE MY PLAN OPTIONS AND LEVELS OF COVERAGE

##### **F. Find a consultant, broker, or agent to confer with**

##### **G. Read ABC Health's newsletters**

##### **H. Subscribe/unsubscribe to ABC Health's e-newsletter**

**V. Group (plan administrator)**

- A. Find industry news
- B. Find news about ABC Health
- C. Find product information
- D. Find formulary information
- E. Access forms, booklets, contracts
- F. Cost management
- G. Find service measurements & results
- H. Benchmark plans
- I. Check billing status & development
- J. Create a financial report

1. ADJUST PARAMETERS FOR FINANCIAL REPORTING

- K. Learn about ABC Health
- L. Read ABC Health's newsletters
- M. Subscribe/unsubscribe to ABC Health's e-newsletter

**VI. Broker (potential broker)**

- A. Learn about ABC Health's products
  - 1. READ ABOUT THE PRODUCTS ONLINE
  - 2. DOWNLOAD PRODUCT LITERATURE
  - 3. REQUEST PRODUCT LITERATURE
- B. Learn about ABC Health's broker services
- C. Learn about ABC Health
- D. Read ABC Health's newsletters
- E. Subscribe/unsubscribe to ABC Health's e-newsletter