

## Case Study:

# Videos simplify plan selection for prospective Blue Shield of California members

### Overview

Blue Shield of California is a large nonprofit health insurer based in Oakland. The company provides health plans to more than 4 million Californians, both through direct individual sales and through employers, labor unions and other groups across the state. Blue Shield worked with the Precisely services team to produce an interactive EngageOne Video experience that client organizations can distribute to their employees (both members and prospects), to help them understand their health insurance options. Feedback indicates that the videos simplify the process of selecting a health plan, with 73 percent of viewers saying they are likely to choose a Blue Shield plan after watching the video.

### Business challenge

Health insurance can be confusing, and researching and selecting the right plan can be tedious. Still, insurance customers require a lot of specifics in order to make their decisions. Providing that information in a format people can easily absorb is an ongoing challenge for insurers.

Blue Shield of California was not immune to the challenge. Serving organizations across the state, the company formerly recruited new members by showing up at in-person health insurance fairs with large booklets describing various plan options.

"It was very expensive to print thousands and thousands of those brochures," says Elizabeth Scarborough, Senior Marketing Manager for Blue Shield of California. "It also did not provide a great experience for prospective members. Our research shows that, in general, people tend to be overwhelmed by health insurance details. Requiring prospects to sift through a book to find the information they needed was not a friendly approach."

The Blue Shield of California Marketing team thought a more high-tech experience would be a better fit for their customer base. They also wanted to make insurance information easier to understand.

### Client profile

#### Blue Shield of California

- Nonprofit health plan provider that is an independent member of the Blue Cross Blue Shield Association
- Gives Californians access to high-quality healthcare at an affordable price
- Serves 4 million members across the state

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— Elizabeth Scarborough, Senior Marketing Manager, Blue Shield of California

That's when they heard about Precisely EngageOne Video from a sister organization in another state. "We liked that other Blue Cross Blue Shield plans had used the solution," Scarborough says. "We were also compelled by the fact that the Precisely account team have experience in our industry. Health insurance is very complicated, and this team has been phenomenal in their ability to understand our business and their dedication to helping us succeed."

## Solution

Blue Shield chose to work with Precisely services to develop an EngageOne Video campaign that explains the specific health plan options available to the employees of each Blue Shield client organization. The project faced an immediate challenge: the time-limited open enrollment period. The team had less than three months to produce and distribute the videos.

Despite the tight timeline, interactive videos were ready for client organizations to distribute as soon as open enrollment began. Each video is tailored to a specific organization, but also aligns with Blue Shield's branding.

Employees can watch straight through for the full eight minutes or select the content that matters most to them. For example, they can select which plans they are interested in, then see a side-by-side comparison of those options along the lines of deductibles, out-of-pocket costs, physician referral requirements and other factors. Throughout the video, navigation buttons on the side of the screen give viewers the option to see plan documents, find a doctor or learn more.

"The real benefit is that the video is self-directed," Scarborough says. "We had previously produced some regular, linear videos. By contrast, the EngageOne video lets prospects skip to the sections with the information they need to choose a plan. That is a far better experience than trying to figure out where the information is in a 50-page booklet."

The video also has a broader reach. "For prospective Blue Shield members, attendance at an onsite health fair was always optional, so in the past, we were reaching only those prospects who showed up at an event," says Lori Mazurek, Member Communications Strategist. "Today, we can work with employers to distribute the video, or post it on their intranet or on a microsite for members and prospects. Digital marketing gives us broader visibility."

## Benefits

The EngageOne Video framework has proven highly popular with both prospective members and their organizations. Viewers have complimented the video's ability to clarify complex information. "In our consumer research, we have gotten feedback that the videos are extremely helpful," Mazurek says. "For example, one focus group participant said, 'I love that I can find what I need quickly, and I'm not overwhelmed with irrelevant information.'"

Each Blue Shield video concludes with a survey, and 83 percent of prospective members have rated their video four or five stars (out of five). Viewers watch for nearly four minutes, on average, and about 40 percent view their video more than once. Most important, after watching their video, 73 percent of viewers have indicated that they are likely to choose a Blue Shield plan.

"With our paper-based approach to marketing, we had no way to evaluate the effectiveness of our materials," Mazurek says.

"We handed people the booklet and directed them to an online survey, but very few participated, so it was impossible to tell whether we had influenced anybody. The real-time metrics we get from EngageOne videos provide actionable feedback on the value we deliver."

Blue Shield of California has achieved substantial cost savings, reducing print costs by up to 80 percent for client organizations that replace printed materials with the video. In addition, the videos have supported the company's expansion of the Trio HMO plan. Feedback from one prospective member summed up the benefit of the new medium: "Without that information [in the EngageOne video], I would be hesitant to try Trio."

Building on the project's early successes, the Blue Shield of California team is working with Precisely on enhancements. They are leveraging the analytics in EngageOne Video, which demonstrate how viewers move through the video and where they stop watching. Sixty days after client organizations began distributing videos, the Precisely services and Blue Shield of California marketing teams conducted a performance review. They discovered that the video content about lifestyle-choice programs was losing viewers focused on plan selection. As a result, they modified the video framework to give viewers a way to skip the programs and services section.

"As our industry moves toward digital solutions, EngageOne Video has given us a competitive advantage," Scarborough says. "And we will continue to work with Precisely to grow and expand this platform. Precisely did not just sell us a product and disappear. They have really taken the time to understand our challenges and come up with creative solutions. Precisely has been a true partner to Blue Shield of California."

## Technology used

- EngageOne Video

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