## AEP Insights by team Optumistic Insights:

Goodmorning, goodevening to folks around the world who are tuned in to our dashboard and taking out time to review our submission for data viz challenge. We are delighted and excited to be participating in this challenge. The energy within the team is exuberant and youthful the least. We have had great time in building this absolutely fresh from the oven dashboard and we have tried to set ourselves apart by baking some of the latest and well accepted features in the world of data visualization. We have also ensured to put multiple validations on the data to report out numbers that tie with overall business reporting. The data behind this dashboard has been pulled using GPS source systems that feed into United Consumer Engagement Engine, commonly referred as UCEE.

I will first begin with briefly highlighting the alarming need of this dashboard and why it could do wonders it this gets through. It’s a well known fact that every day in the U.S. around 10,000 people turn 65, and the number of older adults will more than double over the next several decades to top 88 million people and represent over 20 percent of the population by 2050? Looking at the gradual growth of this baby boomer population, Medicare & Retirement business has a lot of potential to onboard new members in subsequent years during Annual Enrolment Period or AEP cycle which runs between October 15th to December 7th every year, which allows Medicare beneficiaries to make changes to their plan, switch plans, or disenroll from a plan. This is the time when most of the healthcare companies look to generate maximum profit and thus further expand their book volume by acquiring new members. UHC alone generates 65% of new applications for entire year during this time. The dashboard has been designed keeping this opportunity in mind and ultimately this dashboard will provide meaningful insights to 3 diff teams across United -

1) Marketing team who could conveniently assess the conversion rates through their marketing campaigns

2) Finance team who could closely monitor spend results and track Total Cost of Marketing Acquisition

3) Business Strategy team who will get to see the waterfall summary for calls, leads and apps along with best and worse performing marketing mediums, application channels across the entire geography of US.

The dashboard focuses on M&R AEP business and our main focus is on MA/MAPD business which forms the meat of UHC business.

The dashboard at the outset provides key insights into the entire funnel of AEP suggesting the change in number of calls, leads and apps against LY and Forecast. You can very well observe that for the entire AEP we had 19.2% more calls YoY,11.4% more leads YoY and 43.2% more applications YoY, partly owing to higher marketing budget for 2021 AEP and partly owing to the pandemic, which resulted in more awareness between members regarding their health insurance policies. As a result the overall sales exceeded goal by almost 30%.

There is a date slider that shows the start date as Sep 1 which is when the education and brand awareness campaigns also called pre warm campaigns are being sent out in the market related to AEP. Post that there are multiple roll outs of CM, DM, LCH campaigns that are sent in home on different dates. The new applications keep flowing through till Dec 31 and all such applications that come during AEP are referred to as 1/1 effective applications.

Just below the date slider we have 3 most important business parameters that are often being looked upon by business to track best and worse performing status. These values will constantly change when the date slider is moved suggesting best and worse performing metrics at any point of time during AEP which is calculated on the basis of variance between CY and LY. Currently you can see Direct Mail and FMO continued to be workhorse, accounting for **xx**% of all Marketing attributed Apps and **xx**% of total marketing attributed apps respectively. Montana has been the best state when compared against LY.

The middle section of the dashboard is the bulls eye depiction of best and worse performing states which is plotted on the variance of CY and LY. At the outset you can see the % difference with LY but when you hover over it, you could see the count of actual apps for both years and can also see best and worse performing sales market in that state. Again please note that the whole view will align itself constantly on the date ranges that you wish to see from the top.

We have provided a toggle button above the map which will provide you the tabular summary of the parameter that you chose from the left pane. The summary is sorted on CY applications from highest to lowest. Here you can see for example Digital or Web which has been one focus area for the business in AEP’21 performed quite well and was up by 28%. One of the latest feature that has been implemented on the tabular summary is the capability for quick download of the this entire summary in excel by the click of this button here.

There has been lot of conscious effort to keep the dashboard as clean as possible. You might be surprised that the dashboard that allows so much drill down capabilities does not have any filters present. I am afraid you are right that is not possible. 3 stacked horizontal bars on the top left hand side corner is where all the filters are ambushed. This section will allow you to chose the metric you want to view. Additionally what we thought will be more informative is to provide a cross combination view using “Data Filter” tab where you can filter on the combination of say marketing medium as Direct Mail and filter out on application channel as eAlliance only. Further below you can chose the type of applications that you want to view – may it be marketing attributed or promotion history or all. Also if you chose to be more specifically looking at MA/MAPD conversion only, there is a product segment filter for that.

Right panel of the dashboard provides meaningful insights for the finance team for them to track total spend and total applications and hence clearly depicting Total cost of marketing acquisition. We are showing the cost through Direct Mail campaign here because direct mail campaign comprises of 90% of the total marketing cost. We will continue to expand this dashboard in future to bring in cost for other marketing mediums too if requested. You can see for MA the Total cost of marketing Acq is **xxx**$ while for DSNP the TCoA is **xxx**$.

Bottom of the dashboard utilizes key salient feature that statistics guru Hans Rosling had debunked during his Ted X presentation years ago. The default view here shows daily application growth during AEP, stacked against CY and LY. The area chart shows LY while line chart shows CY. One can clearly see the days when CY outperformed LY. Another interesting perspective to look at the health during AEP can be seen by using the toggle button from the top of this chart. This view basically shows how each marketing medium has grown when compared to other marketing mediums during each day of AEP. You have the capability to select a different parameter to view using the filter section that I walked you earlier.

Hope you liked our presentation on AEP Insights 2021. Thanks for your time and patience to review this dashboard with us, the Optumistic Insights team form India. Will keep our fingers crossed in a hope that no good thing ever dies but eventually takes a different form.

-Thanks and have an Optumistic day !