

WF15112439_AA10655_OHC_2025 Engage Smart New Member Campaign EM DM

Prepared By Siva Polthi
Mar 10, 2025 3:35 pm IST

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Overview

Description

Deploy monthly email or direct mail to introduce new members to their health plan and connect them with important resources.

Multiple clients will opt into this campaign and creative will pull in configurable elements from brand and image tables. Monthly deployments beginning February 2025.

Completed creative to be carried over from 2024 campaign:

WF11628812_AA09618_OHC_Engage Smart_2024 New Member Campaign_EM & DM

Project condition

Condition Type
Manual

Condition
On Target

Project dates

Schedule Mode
Start Date

Planned Start Date
Thu, Aug 29, 2024 7:47 PM

Planned Completion Date
Wed, Jun 10, 2026 3:30 AM

Projected Start Date
Tue, Mar 5, 2024 12:07 AM

Projected Completion Date
Tue, Aug 4, 2026 3:30 AM

Actual Start Date
Tue, Mar 5, 2024 12:07 AM

Project stakeholders

Project Owner
Jennifer Lenahan

Project Sponsor
Lauren Davidson

Basic information

Reference Number
15112439

Status
Current

URL

Priority
Urgent

Project association

Portfolio

Program

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MCO | OH OptumHealth Portfolio

OH - Care Solutions

Group
MCO Group

Working time

Planned Hours
326.5 Hours

Actual Hours
74.5 Hours

Actual Duration
0 Days

Planned Duration
415.96 Days

Entry and updates

Entry Date
Mon, Oct 21, 2024 10:22 PM

Entered By
Jennifer Lenahan

Last Update Date
Thu, Mar 6, 2025 11:50 PM

Last Updated By
Anil Kumar

Custom Data

MCO | General Project Form

Default Custom Form Section

Name	Value
MCO Marketing Operations Business Process and Documentation SP Site Link	Click here to access Marketing Operations Business Process and Documentation SP site which holds Job Aids, Guides, Training docs etc.
Is this request B2B or B2C?	B2C
Are you using Doc360 for this project?	Yes
Doc360 Item Numbers	UHC only (no Optum creative) > DM = 301697-062023 > EM1 & EM2 = 301700-062023 (subject lines & preheaders differ)
Creative Resources	N/A
Translation Agency	
OGM Project Number	AA10655
Vendor Names	The John Roberts Company, ExactTarget
Final Number of Items	2

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Name	Value
Project Owner Notes	<p>STATUS Counts for EM2 (Feb) due 3/4</p> <p>MONTHLY CHANGES</p> <ul style="list-style-type: none"> - Due Feb 25 (for April deployments): - Due Mar 25 (for May deployments): - Due Apr 25 (for June deployments): - Due May 23 (for July deployments): - Due June 25 (for Aug deployments): - Due July 25 (for Sept deployments): - Due Aug 25 (for Oct deployments): - Due Sept 25 / Final (for Nov deployments): <p>KEY DATES</p> <ul style="list-style-type: none"> - 3/3: Mon. 3/3 first mailing / Launch 2025 - 2/20: Leadership Quality Review, Mailer - 2/19: Wed. 2/19 EM1 / Launch 2025 - 2/18: Leadership Quality Review, EM - 1/6: BRD Kickoff - 11/18: Data Discovery (Lauren, Jenn and Anil) <p>PROJECT SETUP & ACTIVITY</p> <ul style="list-style-type: none"> - 2/17-2/18: It was discovered that the year in the data file name (ex. AA10655_New_Member_2024_EM_20250214_ToEXT.txt) was incorrect and should be 2025. The data analyst investigated and confirmed this will not be an issue for reporting and will be accurate on the next data run. We did not change the file name because to do that would also mean issuing a new file to the print vendor who has already set up the file in their system, generated data proofs and is ready to run as soon as LQR is completed on 2/21. - 2/17-2/18: On Monday, 2/17, it was discovered that the View in Browser link was not functioning correctly as the web page was not displaying with the clients brand table information, the recipient's first name, and the preheader (ConsumerMsg2). After troubleshooting with Anil and Evelyn, we thought it was resolved. However, when revisiting the prod proofs, it was not - only the last sent prod proof was accurate. On Tuesday morning, via larger call (including Jim J., Lorace (in David's absence), Siva, Evelyn and Anil) we determined that if the data extension was refreshed during the prod proof process then it would overwrite the previously tested email - in other words, if each client's prod proof was individually set up and sent to Jenn, then only the most recent prod proof would function correctly. If, however, all of the prod proofs were sent at one time to Jenn, then they would function accurately. Based on our testing, the entire group believes this is understood / resolved. Notes: The test proofs did not have this issue; this is because they were run off of a mock/test data file We confirmed in testing that personal email addresses, outside of the URLdefense extension, also all functioned correctly as prod proofs. - 2/12: OGM received via MS Teams = AA10655 Call w Anil; clarified how the COPs report and PVRC are used in conjunction with the TCS. - 2/11: Email creatives QC approach for 2025 confirmed with Jim J and David; see Update in project task (#23) - 1/31: Related Adobe Journey Campaign, build underway: WF16045060_OHC_2025 Engage Smart New Member EM DM Journey - 1/30 - Launch creatives fully approved by marketers

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Name	Value
	<p>- 1/24: BOD suppression list for 2025 confirmed, BRD updated, analysts notified: *Suppress UHG Board of Directors (BOD) exclusion list. The same file used for 2024 should be used again in 2025, file name: UHC BoD Suppression ACTIVE & COBRA DRIVER FILE 20230209_2024 Updates*</p> <p>- 1/17: Notified that Blackstone Equity clients (50+) need to be removed from campaigns until further notice; TCS and COPs updated.</p> <p>- 12/19: Excluded from Global Holdout; Approved to exclude Global Holdout from Engage Smart for 2025. See approval here: Documents > Data > Global Holdout > 12 19 24 APPROVED -- FW_ Due Date for Exceptions EM2 (only) will send on Fridays in 2025; testing alternate day of the week send / response performance</p> <p>DELAYS</p> <p>- 2/13: Data posted in late afternoon (2 days behind orig sched) and without several SEEDs; updated data will be needed. Additional delay will be incurred to add SEEDs.</p> <p>- 2/12: Counts for first deployment delayed again; Analysts contacted.</p> <p>- 2/11: Counts for first deployment missed (due 12/10); no communication from analyst. May be due to the daily eligibility refresh (not completed on time); TBD. Jenn reached out to analyst for status & notified marketer.</p> <p>PARTNERS</p> <p>- Marketer - Lauren Davidson</p> <p>- Data - Anil Kumar</p> <p>- Email - David Devine</p> <p>- Print - Monica Austin</p>
Is this an Optum Care California project?	No
Is Leadership Review/Approval Required?	Yes
Leadership Review/Approval Notes	<p>COMPLETE</p> <p>> EM = Delayed, moved to Wednesday, 2/19 - Engage Smart New Member (deploys Thurs. 2/20)</p> <p>> DM = Delayed, moved to Friday, 2/21 - Engage Smart New Member</p>

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MCO | DOW Admin Section - Retired fields on MCO Forms - View Only

Name	Value
Marketing Alignment	Optum Care Solutions

MCO | Calculated Fields

Name	Value
Actual Duration	0
Actual Project Duration Aggregated	30 days or less
Planned Duration	451.96
Planned Project Duration Aggregated	over 120 days

MCO | OH B2C Project Partners_Form

Default Custom Form Section

Name	Value
Campaign Ops Project Notes	
Communication Operations Project Notes	
Consultant Project Notes	

MCO | Calculated Fields

Name	Value
Actual Duration	0

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Name	Value
Actual Project Duration Aggregated	30 days or less
Planned Duration	451.96
Planned Project Duration Aggregated	over 120 days

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MCO | Demand Management Production Intake Form OH

Default Custom Form Section

Name	Value
MCO Marketing Operations Business Process and Documentation SP Site Link	Click here to access Marketing Operations Business Process and Documentation SP site which holds Job Aids, Guides, Training docs etc.
Business Value	Marketing / Growth / Retention
What is the business value impact?	
Is there a Performance Guarantee associated with this request?	No
Legal review required?	No
If NO to legal review, please explain why.	No changes from prior year
Program Framework Code	83.23 Product Health Solutions B2C Client
Is this request B2B or B2C?	B2C
Business Segment	Custom
Is this an Adobe Journey?	

Channel Type

Name	Value
How many channels are used in this request?	Multichannel
Channel Types	Email, Letter / Mailing

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Name	Value
Email Sub-Channel	Other/SFMC
How many creative assets and/or unique templates e.g. email versions are included in your request?	2
Is this request for OH Quarterly Planning?	No
Do you plan to leverage personalization via data i.e. dynamic fields?	
MCO Dynamic Field Examples Descriptive Text	An example of dynamic fields would be member/customer level personalizations and client personalizations i.e. Consumer Name, Address, CTA, URLs, Disclaimers, etc.
Frequency	Monthly
Does this letter/mailling include P.O. Box 660298, Dallas, TX 75266 as the return address?	Yes
Will your materials have a QR Code?	No
Are Translation Services Needed?	No

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GL Information

Name	Value
MCO GL Code instruction	**A GL Code is needed for documentation purposes. If a code is not entered your request could be delayed. Not required for Web & App or Marketo Program Status Change, enter N/A.**
Business Unit - 5 digits	00000
Operating Unit - 5 digits	00000
Location - 8 characters alpha-numeric	00000000
Department - 6 digits	000000
Account - 5 characters	
Product - 6 characters	
Customer - 7 characters	
Request - 10 characters	

Creative

Name	Value
MCO Tier guide link	Please review the Creative Tier guide (click here) before making your selection
Tier Level	Tier 3 - pick up with minor change

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Timing

Name	Value
Request Completion Date	2025-02-11

B2C Project Details

Name	Value
Is this an OHS Custom Team Request?	Yes
Client	Engage Smart
Will your assets live on the OMR Portal?	No

MCO | OH B2C BRD_Form - Request & Project

Default Custom Form Section

Name	Value
Is this request for OH Quarterly Planning?	No
Is this a Legacy B2C Campaign request - a.k.a. not an Adobe journey?	Yes
MCO OH B2C SLA guide for Data Request	Click here to access the SLA guide for Data Request. It provides information on data sources and the Service Level Agreement for turnaround times.
MCO Marketing Operations Business Process and Documentation SP Site Link	Click here to access Marketing Operations Business Process and Documentation SP site which holds Job Aids, Guides, Training docs etc.

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Campaign Overview

Name	Value
MCO OH B2C Campaign Objective char limit statement	The Campaign Objective field has a maximum of 2000 characters including spaces. Please use the Additional Details field if needed.
What is the goal of this campaign/outreach?	Introduce new members to their health plan and connect them with important resources.
How will you measure success of this campaign/outreach KPIs?	Standard email metrics; myuhc registrations; app downloads; personalization opt-ins; inbound calls
Have we executed this campaign in the past?	Yes
If yes, do you have the AA#?	AA09618
Is this an Ad Hoc or Recurring Business Process?	Recurring Business Process
Cadence	Monthly
BRD Campaign Modality	Email, Direct Mail
Is this an Optum Financial Campaign?	No

Campaign

Name	Value
MCO OH B2C Standard Campaign Section	These questions are only applicable to B2C (non-financial) campaigns.

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Email Campaign Audience and Suppressions

Name	Value
MCO OH B2C Data Source Header Email	DATA SOURCE - Email
MCO OH B2C Descriptive text - Email de- duplication rule	Any duplicate email addresses within one file will be de-duplicated unless otherwise specified in additional campaign notes below.
MCO OH B2C Descriptive text - Best Available Email Hierarchy	Current Email Hierarchy, which defines BEST EMAIL is: <ul style="list-style-type: none"> o iMDM (which includes EPMP) o Rally o Myuhc.com o Emails from Eligibility o ICUE
What is the Email Data Source?	OCE
Expected Data Count for Email	2000
MCO OH B2C Specific Email data source instructions	If specific data source is needed, enter description in Additional Email Audience and Suppression Rules text field. This request will require approval by your Campaign Analyst.
MCO OH B2C Population Header Email	POPULATION - Email
Call to Action - EM	My UHC Registrations
Main Call to Action Link - EM	https://member.uhc.com
Audience - EM	One Per Member
Coverage Type - EM	M - Medical coverage only
Policy Number - Data from CES - EM	WF report to be provided
Account Code - Data from FACETS - EM	WF report to be provided
Gender - EM	All

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Name	Value
Are you emailing to anyone outside the 50 US states? - EM	No
Do PVRC or Op Seg Codes apply to this campaign? - EM	Yes
MCO OH B2C Descriptive text - PVRC Op Seg EM	If yes, please add list to the documents tab above.
Is attached PVRC an Exclusion or Inclusion? - EM	Inclusion, Exclusion
Is a LaunchPad report needed for this project? - EM	No
MCO OH B2C Suppressions Header Email	SUPPRESSIONS - Email
Should members under the age of 18 be excluded? - EM	Exclude members under age 18
Will the member be receiving both the email and direct mail outreach?	No
Removal Criteria - EM	N/A
Contact History suppression - lookback EM	No lookback
Does this campaign have a reminder/series of email sends?	Yes
Reminder/Series Suppression Rules	Includes reminder email that may be deployed within 14 days after initial send. The only variation from initial email is a different subject line. Reminder email should only go to members outreached in initial email but did not click on any part of the initial email.
MCO OH B2C Email Natl Opt Out	Note - Members that opted out of Optum's CSG Exact Target instance are automatically removed

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Name	Value
Additional Email Audience and Suppression Rules	<p>*Suppress the 2025 UHG Board of Directors (BOD) exclusion list.*</p> <ul style="list-style-type: none">- Deploy monthly email or direct mail to members who are new to the monthly eligibility file- First deployment in February should have lookback to 1/1/2025. All subsequent deployments should look back to previous deployment (approximately 30 days).- Email will go to everyone with email address on file; direct mail should go to anyone who does not have email address- Deploy reminder email within 14 days of initial email to anyone who did not click on the initial email- Members should receive this campaign no more than one time. Exclude anyone previously contacted.
Is scoring criteria needed? EM	

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Email Testing

Name	Value
Is a holdout applicable?	
Is this a regulatory campaign? - EM	No
Do you require additional testing? - EM	No
Additional analytics and testing notes - EM	No Holdout; 12/19 - Approved to exclude Global Holdout from Engage Smart for 2025. See approval here: Documents > Data > Global Holdout > 12 19 24 APPROVED -- FW_ Due Date for Exceptions

Direct Mail Audience and Suppressions

Name	Value
MCO OH B2C Data Source Header Direct Mail	DATA SOURCE - Direct Mail
What is the Direct Mail Data Source?	OCE
Expected Data Count for Mail	1100
MCO OH B2C Population Header Direct Mail	POPULATION - Direct Mail
Call to Action - DM	My UHC Registrations
Audience - DM	One Per Member
Coverage Type - DM	M - Medical coverage only
Policy Number - Data from CES - DM	WF report to be provided
Account Code - Data from FACETS - DM	WF report to be provided
Gender - DM	All

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Name	Value
Are you mailing to anyone outside the 50 US states? - DM	No
Do PVRC or Op Seg Codes apply to this campaign? - DM	Yes
MCO OH B2C Descriptive text - PVRC Op Seg DM	If yes, please add list to the documents tab above.
Is attached PVRC and Exclusion or Inclusion? - DM	Inclusion, Exclusion
Is a LaunchPad report needed for this project? - DM	No
MCO OH B2C Suppressions Header Direct Mail	SUPPRESSIONS - Direct Mail
Should members under the age of 18 be excluded? - DM	Exclude members under Age 18
Removal Criteria - DM	N/A
Additional Direct Mail Audience and Suppression Rules	<p>*Suppress the 2025 UHG Board of Directors (BOD) exclusion list.*</p> <ul style="list-style-type: none"> - Deploy monthly email or direct mail to members who are new to the monthly eligibility file - First deployment in February should have lookback to 1/1/2025. All subsequent deployments should look back to previous deployment (approximately 30 days). - Email will go to everyone with email address on file; direct mail should go to anyone who does not have email address - Deploy reminder email within 14 days of initial email to anyone who did not click on the initial email - Members should receive this campaign no more than one time. Exclude anyone previously contacted.
Is scoring criteria needed? -DM	

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Direct Mail Testing

Name	Value
Is a holdout applicable? DM	
Is this a regulatory campaign? - DM	No
Do you require additional testing? - DM	No
Additional analytics and testing notes - DM	No Holdout; 12/19 - Approved to exclude Global Holdout from Engage Smart for 2025. See approval here: Documents > Data > Global Holdout > 12 19 24 APPROVED -- FW_ Due Date for Exceptions

Data File Layout

Name	Value
MCO OH B2C Data File Layout R and R message	The PM is responsible for this section
Any enhancements needed to the standard layout?	Yes
Have changes been made to the layout form?	Yes
MCO OH B2C Seed List Instructions	If Seed List is required add to TCS Template Excel Workbook "Seed List" tab (template name: TCS_Description_MMDDYYYY_V1)
Is Seed List tab completed?	Yes

OH B2C Email

Name	Value
MCO OH B2C Test File Details	A test file will be provided if variable information is listed in the TCS (Target Cell Spreadsheet)
Email addresses for proofs	lauren.davidson@optum.com jennifer.lenahan@optum.com
File type - standard types listed below	Sketch Export

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Name	Value
Are there variable fields?	Yes
Indicate location of Variable Fields details	See PDF
MCO OH B2C Link to More than 8 Emails Excel template	If you have more than 8 Email total please click this link to open up an Email Details template "BRD Email Details for greater than 8 Emails". Enter information for ALL Emails here and attach to the Documents tab. Enter Additional Email Information in the text box below.
Email Name/Description	2025 Engage Smart_New Member Campaign EM1
Email Item Number	EM1 & EM2 = 301700-062023
Email Sending Domain	
Email From Name	Pulls from Brand Table
Email From Address_before and after @	Pulls from Brand Table
Email Subject Line	EM1: Subject: Welcome to your new health plan Preheader: Follow these 3 steps to maximize your benefits
Additional Email Information	Same email creative (item #) for both deployments (EM1 & EM2), but different subject lines and preheaders for each.
Would you like to add additional emails?	Yes
Do your additional emails contain the same basic information?	Yes
How many emails would you like to add?	1

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OH B2C Email #2

Name	Value
Email #2 Name/Description	2025 Engage Smart_New Member Campaign EM2
Email #2 Item Number	EM1 & EM2 = 301700-062023
Email #2 Subject Line	Subject: Reminder: Kickstart your health plan with these 3 steps Preheader: Take 5 minutes to get the most out of your new benefits

OH B2C Reporting

Name	Value
MCO OH B2C Exception to Standard reporting descriptive text	<p>Standard Reporting will always be provided.</p> <p>If not Standard Reporting, or to request Exclusion, please click this link and complete the Analytics Intake Request Form.</p> <p>A campaign qualifies for exclusion only if any of the required data fields are unavailable (First Name, Last Name, or DOB)</p>

Approvals

Name	Value
MCO OH B2C Approval Information	<p>All Approvals should be received after campaign kick-off. Campaign Analyst will not run campaign without all sign off.</p> <p>If any edits are made to the BRD an issue must be entered on the Issues tab.</p>
Analytics Team accepts and approves BRD?	
Campaign Analyst accepts and approves BRD?	Yes
Email Team accepts and approves BRD?	Yes
Marketing Manager accepts and approves BRD?	Yes
BRD Approval - Team Member Names	Lauren, Anil, David, Monica & Jenn

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Name	Value
BRD Approval Date	2025-01-06