



Strategic Planning: One Pool's Story

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SPEAKERS



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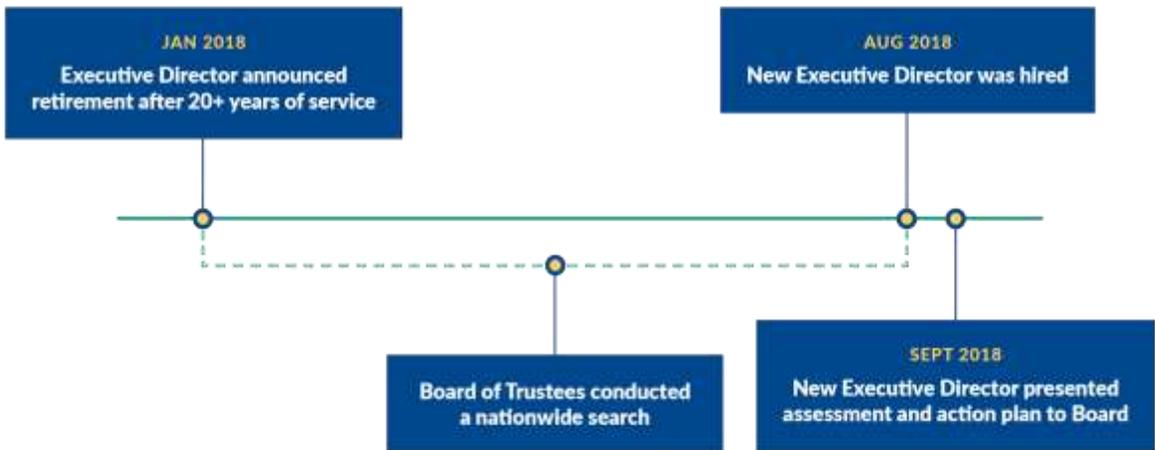
TML HEALTH
EXECUTIVE DIRECTOR

TML HEALTH BY THE NUMBERS**41** years in operation**900+** plan designs to choose from**24** trustees**969** employer groups in the Pool**130** staff**35,000** covered lives

MEDICAL, DENTAL, VISION, LIFE, LTD, STD, FLEX, HRA, AND HSA

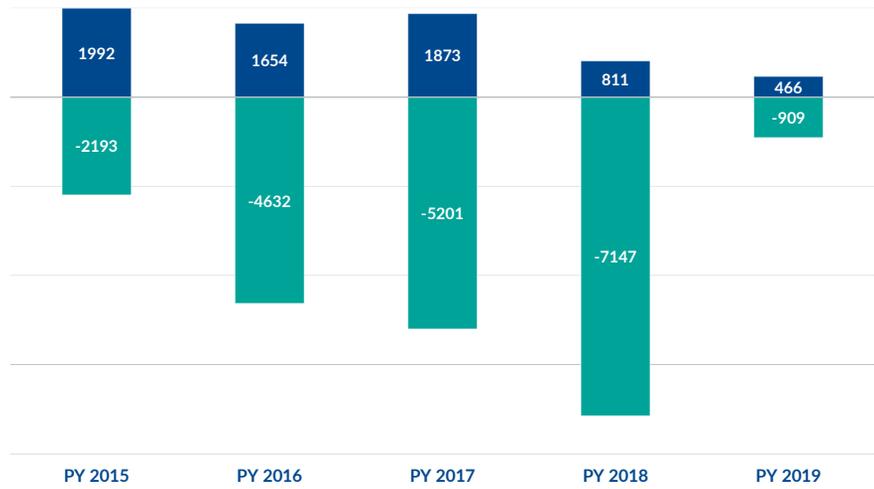
\$207,780,000 annual revenue**\$143,500,000** paid medical, dental & vision claims**\$27,000,000** paid Rx claims

Leadership Change



Declining Membership

MEMBERSHIP GROWTH/LOSS BY LIVES



180 in 120

- 40 projects/400+ tasks to complete in 120 days
- New executive leadership team
- Increased staff in customer care
- New branding and logo
- Updated Mission Statement, Vision & Core Values
- Abandoned projects that did not improve service or claims
- Cut complexity and paperwork
- New rating model & plan designs
- New Wellness Program
- 16 Regional Meetings with members to introduce improvements



180/120 Results

- Customer Service Level increased from 13% to 80% of calls answered in 30 seconds or less
- New rate model stabilized pricing, avg. 3% increase
- Returned \$6 million in member equity through renewal credits
- Membership stabilized

CUSTOMER SERVICE CALLS ANSWERED IN 30 SECONDS OR LESS



NEW RATE MODEL STABILIZED PRICING

3%

AVG. INCREASE

RETURNED MEMBER EQUITY THROUGH RENEWAL CREDITS

\$6,000,000

THE LANDSCAPE

Texas legislature passes revenue caps for municipalities & counties

Competitors writing coverage at 30% below manual

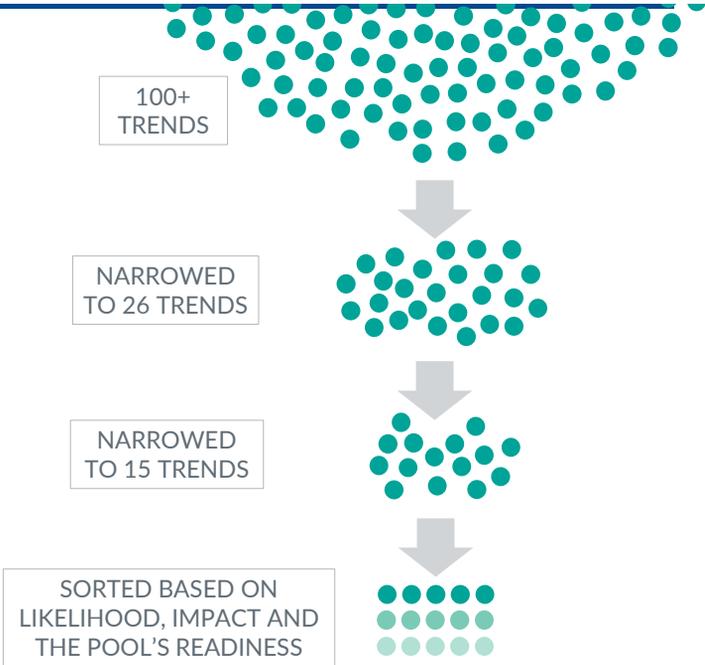
National political candidates promote “Medicare for All”

Drugs costing \$90k/month are starting to be seen

Pool must innovate and improve costs or risk extinction

STEEP Trends

Society
Technology
Economy
Environment
Politics



Board Member's Insights

- How will the landscape change?
- Where are we now and where do we want to go?
- What services are most important to our members?
- How do we effectively deliver them?
- What role will technology play in the future?
- How do we grow the business?
- Where are our target markets?
- What do we do best?

Identifying our Focus Areas

1. Develop a market strategy to grow our member base
2. Leverage our differentiators and value-added services
3. Develop creative access to quality healthcare, including technology and provider partnerships
4. Prevent and mitigate chronic conditions
5. Use our reserves wisely
6. Develop a technology roadmap that balances convenient access to tools and information with data security

Identifying the Goals

- Manager Team held a workshop to identify goals that would address these 6 focus areas
- Executive Leadership refined the goals further
- Project teams developed initial timelines and feasibility assessment
- Executive Leadership further refined the goals
- Ultimately, we wanted to make sure that all WIGs would address each of the 6 focus areas. We eliminated 1-offs.

Wildly Important Goals



Modernize our
technology
strategy and
platforms



Improve our
benefits payer
system and
network options



Introduce a
concierge model
of service



Major Milestones on our Strategic Path



Digital Maturity Assessment



Update Billing & Eligibility System



1-stop Shop App/Website



Best in Class Disease Management Program



Third Party Administrator & Provider Network



Provider Direct Contracts & Carve-out Networks

Communicating the Plan



- Infographic style of communication makes it easy to see the big picture
- Strategic Plan Booklet goes into more detail about the process
- All-Team presentations to roll out the plan to staff
- In depth training with Marketing Team to facilitate clear communication with members

Methodologies & Resources

MOVE

by Patty Azzarello

AGRiP Foresight Residency

Futures Lab

by Rebecca Ryan

AGRiP Advisory Standards for Recognition

Four Disciplines of Execution

by McChesney, Covey & Huling

Thank you.