



# How a leading Medicare Advantage Organization automated their marketing material creation – for dramatic improvements in speed, cost, and accuracy



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## BACKGROUND

### Managing within tight timeframes

Annual enrollment in the United States is an important time for Medicare Advantage Organizations (MAOs) during which they secure customers and lock in revenue streams for the upcoming year. These organizations are regulated by the Centers for Medicare and Medicaid Services (CMS) who sets rules and approves the plans being offered.

Each spring, CMS releases new regulated model documents for the Annual Notice of Change (ANOC), Evidence of Coverage (EOC), and Statement of Benefits (SB)—complex documents that are central to all Medicare marketing materials. In preparing for annual enrollment, MAOs must incorporate these model changes and configure their marketing materials within tight timeframes—ensuring their plans are 100% compliant with CMS guidelines, approved, and ready to go.



## INTRODUCTION

# The desire to scale operations

A leading non-profit MAO—providing health coverage to 1.2 million members and drawing on a network of 500,000 providers and 5,000 hospitals—wanted to scale their operations to capture more of the Medicare Advantage market.

To support this goal, they outsourced the annual preparation of their Medicare marketing materials to a third-party vendor. Preparing these materials in-house had been challenging and it was hoped the new vendor could better manage the process. The MAOs Correspondence and Fulfillment Operations (CFO) team was responsible for overseeing the document preparation process and managing the third-party contractor.



## CHALLENGE

# Outsourcing fails to alleviate the document change burden

After working with the third-party vendor for several years, it became evident they too had some fundamental document change management issues.

### Errors

On multiple occasions, the CFO team proofed content from the third-party vendor only to discover that new versions contained previously corrected errors. The vendor clearly lacked control over content changes and versions, and this had allowed errors to slip through.

### Lack of insight

When the vendor provided files for approval, it was difficult to isolate what changes had been made. This meant approvals were slow, manual, and often made without sufficient insight.

## Errata and remediation events

With errors creeping into marketing materials the MAO had 3 errata within a single year—each of which was costly and placed a heavy burden on staff to oversee remediation activities. The chaos they attempted to avoid by outsourcing continued to persist.

## Inability to scale

Desiring to grow and scale their business, the MAO had outsourced their marketing material preparation to free up the resources needed to go after new market segments. Unfortunately, those resources remained fully consumed fixing errors and managing remediation projects. The outsourcing of marketing materials had failed to deliver them from the burden of managing annual changes. There had to be another way.



## SOLUTION

# Automation is the key to success

When a new Lead Document Preparation Analyst joined the CFO team, she quickly sought to resolve the issues the team was facing. She turned to Messagepoint to improve their accuracy and streamline their processes.

[Messagepoint Touchpoint Exchange for Medicare](#) is a modern, SaaS solution purpose-built for MAOs. It simplifies and automates the preparation of marketing materials to such an extent that the document preparation team can fully control the configuration and updating of benefit plan marketing materials themselves.

Here are the points of automation that delivered breakthroughs for this organization:

## Directly incorporate PBP data

By incorporating plan data from CMS's Plan Benefit Package (PBP) database directly into the platform, the solution eliminates the need to manually re-enter it and ensures the data used to create plans is 100% compliant with their annual bid submission. This reduces significant time, cost, and human error.

## **Leverage pre-built CMS model documents**

[Messagepoint Touchpoint Exchange for Medicare](#) provides annually updated ANOC, EOC and SB CMS model documents (touchpoints) in the solution platform—eliminating the MAOs need to make the annual changes themselves. When updating their marketing materials, the document preparation team simply synchronizes with the updated model touchpoints. This ensures plans for the new year are fully compliant with CMS guidelines.

## **Dynamically control plan variations**

The solution's content management, rule management, and version management capabilities have also delivered dramatic efficiencies and control—eliminating significant manual and error-prone work across plan variations.

Within the solution, the document preparation team makes changes to content quickly and easily. A guided process helps them with simplified entry of customized plan information. Then, when all those changes are saved, updates are dynamically applied across a single document or multiple versions—automation that has eliminated untold hours of manually updating the same information repeatedly. The ANOC, EOC and SB PDFs are 508 compliant and ready for production once all reviews are completed.

## **View side-by-side version comparisons**

In terms of review and approval, a QA process gives the document preparation team the insight they need—displaying side-by-side version comparisons, enabling them to see exactly what changes have been made, and providing the opportunity to annotate if further changes are required. This allows them to rapidly respond to late coming CMS changes, review documents for production, and make approvals with full confidence they are accurate.

## **Give control to the document preparation team**

Perhaps the single greatest benefit is the team's ability to control the end-to-end process. By eliminating reliance on IT, other internal teams, and the third-party vendor they've reduced significant coordination and back-and-forth communications—streamlining what was previously a time-consuming process.





## IMPACT

### **Meeting annual timelines; year-over-year savings**

Messagepoint has helped this MAO bring an unwieldy, slow, and error-prone process under control. By leveraging automation to eliminate manual work, it has enabled them to deliver their marketing materials on time and lightened what was formerly a heavy burden on staff.

In the years ahead, this MAO plans to transition more and more plans from the third-party vendor into Messagepoint. As each additional plan is brought into the solution, the burden on staff will further decrease and savings accumulate.

In addition, translations will be a growing requirement to address in the years ahead. The MAO has almost reached the language thresholds defined by CMS, and Messagepoint's ability to create touchpoints in various languages will save them significant translation costs.



## Benefits

### + Speed

- Plans were delivered to production on time.
- Time and effort was reduced by 70%.

### + Compliance and accuracy

- There were no errata or remediation events.

### + Cost savings

- With plans delivered on time, they were in a position to take advantage of bulk mailing and avoid first class postage costs.
- By automatically tagging content and validating marketing materials were machine readable and 508 compliant, they avoided the cost of outsourcing this to an external vendor.

### + Year over year efficiencies

- In the initial year, document preparation teams spent time setting up plans in Messagepoint by defining content and rules.
- In subsequent years, however, they will only need to modify items that change. This will dramatically accelerate the speed of creating and updating plans and delivers substantial cost and time savings year over year.

Messagepoint Touchpoint Exchange for Medicare is purpose-built to relieve MAOs from the burden of creating and updating Medicare marketing materials. By automating the process of bringing together PBP plan data and CMS model content, organizations can dynamically and automatically generate versioned plan materials that are 508 compliant. This automation not only reduces the potential for erratum, it saves health insurers significant time and money while opening the door to expand and grow operations.

**To learn how Messagepoint can transform your customer communications management, contact us today.**

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