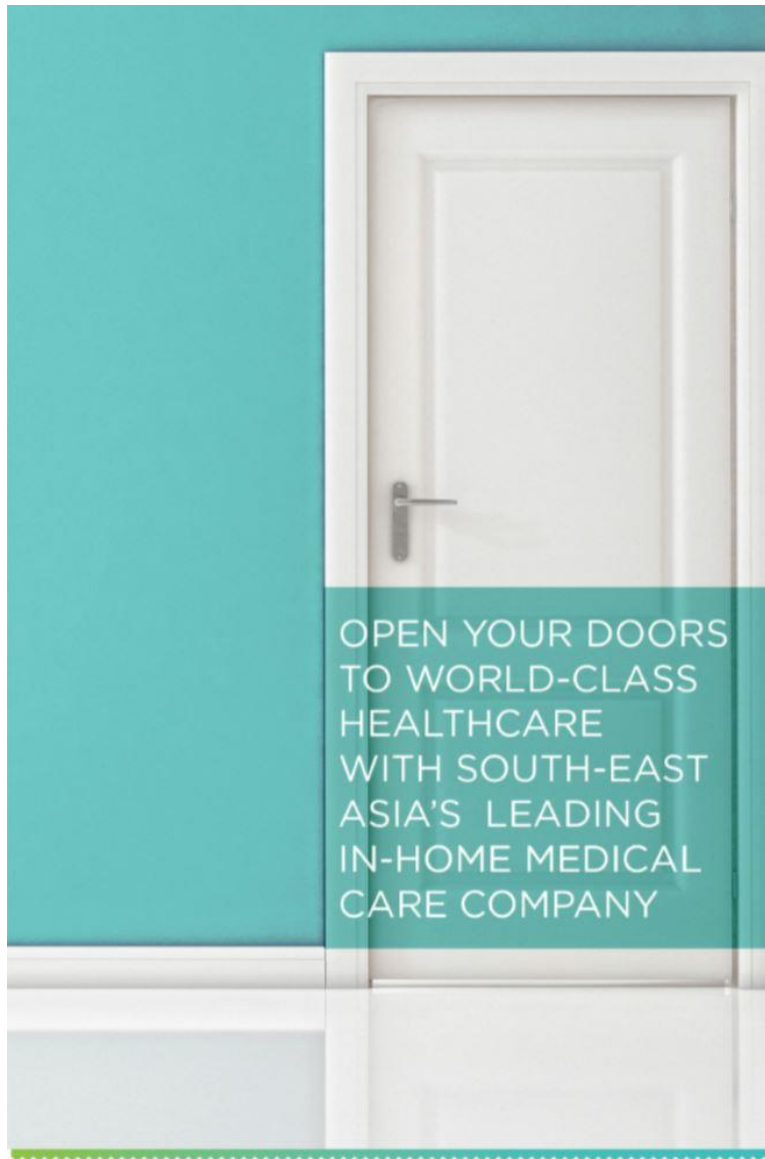


CUSTOMER RE-ENGAGEMENT PROJECT REPORT

JUNE-AUGUST 2015



PORTEA
HEAL AT HOME

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Questions about this Project Report?

Please contact Brittany Rosario, Marketing Consultant Intern at brittanyrosario3@gmail.com

PROJECT TIMELINE

This project is put together throughout the month of June and by the end of July everything is created and implemented so that August is the month of results and analysis to see what worked and what didn't get ready for either continuation of this project or a new project from September-December. Below is the project timeline layout inserted from Microsoft Excel:

| Marketing Timeline: Patient Engagement Project (Malaysia) | | | |
|---|-------------------|-----------------|----------------------------------|
| Task Name & Actions | Start Date | End Date | Comments |
| Introduction | 17-Jun | 19-Jun | |
| Meet with Patients and get a better understanding of 4 cities in Malaysia | 17-Jun | | There is no end to this :) |
| Survey and calling scripts from India | 18-Jun | 19-Jun | |
| Budget Development | 18-Jun | 19-Jun | |
| Put together referral campaign | 18-Jun | 19-Jun | |
| Phase One | 22-Jun | 3-Jul | |
| Email & Mail surveys to patients | 22-Jun | 24-Jun | All Cities |
| Find a printer & get Engagement Kits printed | 22-Jun | 26-Jun | |
| Start Referral Campaign | 22-Jun | 3-Jul | Especially In Penang |
| Reconnect with former customers in person & over the phone | 24-Jun | 3-Jul | **Need a call evaluation sheet** |
| Patient Discovery | 6-Jul | 10-Jul | |
| Analyze results of surveys | 6-Jul | 7-Jul | |
| Meet with patients about any survey concerns | 8-Jul | 10-Jul | |
| See how well referral campaign is doing | 8-Jul | 10-Jul | More or Less? (Make Changes) |
| Put together ideas for Digital Marketing | 9-Jul | 10-Jul | All Cities |
| Phase Two | 13-Jul | 31-Jul | |
| Create a second version of calling script and surveys | 13-Jul | 14-Jul | |
| Implement any new ads Digital Marketing | 13-Jul | 31-Jul | |
| Repeat Phase One with new materials | 14-Jul | 31-Jul | |
| Recruitment | 6-Jul | 31-Jul | |
| Open new positions for call center & marketing job to create a team | 6-Jul | 20-Jul | |
| Interviews | 20-Jul | 27-Jul | Chinese applicants? |
| Hire marketing & call center team | 27-Jul | 31-Jul | |
| Finishing Touches | 27-Jul | 7-Aug | |
| Finalize a project report | 27-Jul | 7-Aug | |
| New Employee Training | 3-Aug | 7-Aug | |

The above project timeline changed several times as the project progressed and unexpected complications arose.

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PROPOSAL OF ACTION

Implementing the customer re-engagement project consisted of constant communication with the Portea Medical Marketing Team and Executives in India, and dividing the project into individual tasks based on India's model for customer engagement and outreach created by Riddhi Deb, Senior Manager of Special Projects.

As marketing consultant, I had to make sure that the campaign ran effectively in Malaysia's four cities: Ipoh, Penang, Kuala Lumpur, and Johor Bahru. The beginning of the project began with the initial idea to reconnect with former patients, put together a patient referral program, create a clinician incentive program, print and distribute re-engagement kits and perform A/B testing by having surveys given to non-customers and existing customers.

The process started by making contact with the team members in India. First, the engagement plan implemented and created for India was reviewed and revised for new implementation in Malaysia. Once realized that there was a diverse crowd of individuals in Malaysia compared to the demographics in India, a survey was created to find out what Malaysian customers expect from a home healthcare company.

At first, it was a difficult task to get surveys filled out. Mainly from the soliciting laws in Malaysia. So, the security guards in heavily occupied places like KL Sentral and NU Sentral are extremely aggressive about people not selling their products or giving out free merchandise or even handing out flyers. However, I was still able to get almost 30 non-customer surveys filled out and gather helpful results from the other company workers on my office floor. The existing customer surveys were handed out to the physiotherapist for their current patients to fill out over the course of two weeks. Due to that advantage, we were able to quickly get customer surveys finished.

Next, deadline dates were set to get the referral program and clinician incentive programs active as running campaigns to increase patient numbers and leads a day. At the beginning of August everything was constructed and ready to go. The patient referral program started on August 1st, 2015 and will end until December 31st, 2015 or as long as engagement kits are in supply.

Lastly, there will be focus groups created for each city of Malaysia where Portea offers service. These focus groups will be presented with information about the demographics of the potential Malaysian market based on survey results, re-engagement kits and all its' contents, as well as, clinician incentives, cross selling initiatives, and important aspects of communicating with patients and people in the cities to gain positive publicity and increase not only the number of patients but also the number of people who know Portea Medical actually exist in Malaysia and where they can find us if they need our services.

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IMPLEMENTATION PLAN

The purpose of the customer engagement project was to understand ways to exceed the expectations of our Malaysian markets' potential, existing, and former customers; that they know Portea Medical provides the highest standards of home healthcare in Southeast Asia and ensures trust in handling their health.

Our plan involved two major aspects: gathering the demographics of our four cities based on our own census results and increasing the number of patients we have all over Malaysia, mainly in Johor Bahru, Penang, and Ipoh where we have the least number of patients. We used the distribution of flyers in KL Sentral as a part of our marketing strategy. Social media was also a part of our campaign, where advertisements were posted about our services offered at various international locations, celebration of home healthcare during Ramadan, and the new services offered especially in Malaysia.

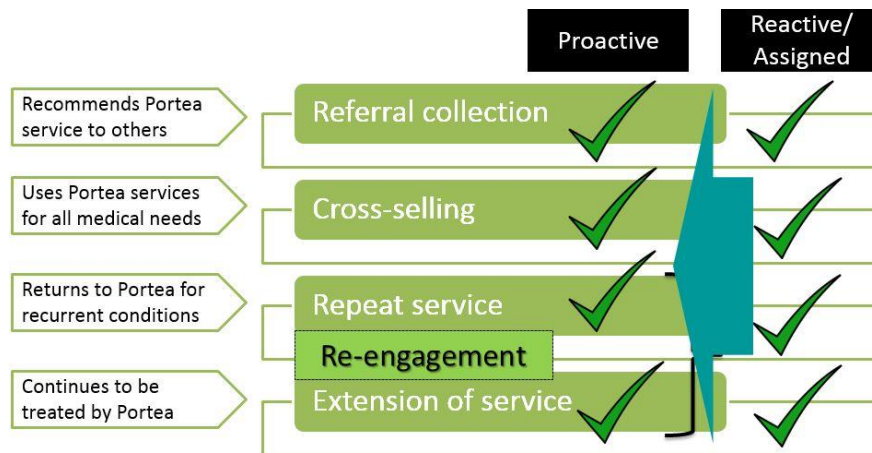
A part of the process of our project I had to communicate with the India team to get engagement kit designs revised to match the requirements of the Malaysian office and target market. Engagement Kits have letters from the Co-founder & CEO of Portea, referral vouchers that explain the program, and mini brochures about the services offered which are packaged in a white Portea folder. Our communication was handled through email and skype calls.

The plan was to have all engagement kits printed and shipped from India to Malaysia by the end of July. However, there were a few days of miscommunication or lack of communication all together which resulted in a delay for arrival. The estimated arrival date is set to Monday, August 24th, 2015.

Questions about this Project Report?

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CUSTOMER RE-ENGAGEMENT PLAN



These helpful hints were provided by Riddhi Deb at the beginning of this project. [For more info, please refer to page 13: Notes for Understanding Customer Engagement]

How to create a customer re-engagement program:

1. Deliver quickly and iterate
2. Basic re-engagement program
3. Segmentation: specific target groups
4. Data integration: Surveys
5. Personalized engagement: phone calls and home visits
6. Preference Centers:
 - a. Decent choices: referral vouchers
 - b. Subscription to service: packages
7. Multichannel marketing:
 - a. Social media
 - b. Bus/airplane/monorail ads
 - c. Newspaper/magazine ads
8. Incentive for non-engagers:
 - a. Portea pens/t-shirts
 - b. Visa Gift card
 - c. Referral incentives

Questions about this Project Report?

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PATIENT REFERRAL PROGRAM

A limited time promotion starting on Monday, August 10, 2015.

How does it work?

An existing patient will refer a friend or family member to use our service and will receive a Portea voucher or gift voucher to Aeon, Zalora, OR Lazada valued at RM50. After their friend or family member actually makes the appointment and uses our service for the first time, that friend or family member will also receive a Portea voucher (ONLY) valued at RM25, which can be used on their first visit or saved for their second visit.

How do patients make the referral?

They can make the referral with any one of these options:

- Log on to the Portea Consumer Portal (my.portea.com)
- E-mail us at malaysia.care@portea.com
- Call us at [+6 011 2725 3035](tel:+601127253035)
- Tell the Portea clinician who is visiting them

What are the guidelines for making a referral?

Step One: Referring someone includes getting the friend or family member's name and mobile number, and the existing patient's Portea ID / mobile number and reference code.

Step Two: Someone from the Portea Referral Team will get in touch with the friend or family member referred, assign appointments and send them RM25 Portea Vouchers

Step Three: Should someone you refer receive a Portea service, you get a RM50 Portea Voucher

Terms & Conditions

1. Portea Vouchers are not redeemable for cash
2. The referrer can gain the discount only if the referred registers with Portea and uses his / her first service
3. The referred has to use his / her first service during limited time promotion.
4. In all communication with Portea, the referrer has to mention his / her Portea ID / mobile number and reference code REFERMY15

Questions about this Project Report?

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EVIDENCE OF RESULTS

We were able to successfully accomplish some of our project goals. The engagement kits were printed and shipped from India, surveys were conducted, survey results were analyzed and filed, new advertisement flyers were made and printed, and the patient referral program has begun.

Our Facebook page continues to launch new advertisements and post every week without technical difficulty. Our flyers were effectively distributed throughout KL Sentral and provided good information about our physiotherapy services offered. Our survey forms were available to the patients on paper from our physiotherapist.

We didn't offer anything to non-customers or existing customers to get them to fill out the surveys which resulted in a low number of results. Maybe if an incentive was considered to get them to fill out the surveys there would have been more results turned in. Also, if this project wasn't limited on time it would've been possible to pursue further marketing ideas and events for our project.

Questions about this Project Report?

Please contact Brittany Rosario, Marketing Consultant Intern at brittanyrosario3@gmail.com

APPENDIX.....

CUSTOMER SURVEY RESULTS

Can be found online from Google Drive folder titled Marketing Project '15.

NON-CUSTOMER SURVEY RESULTS

Can be found online from Google Drive folder titled Marketing Project '15.

CALL SCRIPTS

Existing Patient: Call Evaluation Sheet

Good Evening. I'm calling from Portea Medical home healthcare. Is this (patient first/last name)? Hello, this is (your first/surname). I'm calling to follow up about your recent (service) sessions.

Transition:

Can I have a moment of your time today to speak with you?

Yes: Fantastic.

No: Okay. That's fine. I would like schedule a call back. When are you available for a call back?

Bonding Questions:

-What do you like about our service?

-What do you dislike about our service?

-How can we create a better service for you?

-Would you refer us to your friends/family? Why or why not?

-Do you think the price you pay for our service is a good price?

-If you could name your price for our service what would it be?

Summarizer Rapport:

Patient title, surname. I really appreciate you sharing your experience with me. As a patient, you have the ability to change how we do things here at Portea Medical based on your feedback. If you have any suggestions for us. We would love you to share it with it so that you and all patients can get the world class home healthcare experience they deserve.

Wrap up the call!

It has been good talking with you. Hopefully you will continue to use our services in the future. Have a great day/night.

Questions about this Project Report?

Please contact Brittany Rosario, Marketing Consultant Intern at brittanyrosario3@gmail.com

Former Patient: Call Evaluation Sheet

Introduction:

Good morning/afternoon/evening. I'm calling from Portea Medical home healthcare. Is this (patient first & surname)? Hello, this is (your first/last name). I'm following up about your previous (service) sessions back in (month/year).

Transition:

Can I have a moment of your time to ask you a few questions about your experience using our service in the past?

Bonding Questions:

- What did you like about our service?*
- What did you dislike about our service?*
- If they think the service was too expensive assure them that it was well worth it and ask them, 'What price do you think is good for this kind of service?' or 'What would you like to pay?'*
- What would you change about your experience with Portea?*
- What do you think of Portea Medical?*
 - Rate us from 1 to 5 (5 being the best)*
- Why did you choose Portea?*
- Would you recommend us to your friends or family?*
 - We are starting a new referral program in August where if you refer a friend or family member to use our service for one session you will get RM50 Portea, Aeon, Zalora, or Lazada voucher and they will get RM25 Portea voucher (only Portea).*

DON'T FORGET TO TELL THEM ABOUT OTHER SERVICES THAT WE OFFER. If they only used physiotherapy, then offer them nursing or a caregiver to make sure they are well taken care of.

Summarizer Rapport:

Patient title, surname. I really appreciate you sharing your experience with me. As a former patient, you have the ability to make things better at Portea by giving us suggestions and following us on Facebook to see our current services.

Wrap up the call!

It has been good talking with you. Hopefully you will use our services in the future if you or a loved one has any other medical issues. Have a great day/night.

Questions about this Project Report?

Please contact Brittany Rosario, Marketing Consultant Intern at brittanyrosario3@gmail.com

CALL SCRIPT NOTES

Steps to Customer Re-engagement Calls

1. Create a start rule: “Start 90 days after last appointment date”
2. Used a decision rule to filter out any contacts you don’t want to receive information about the program
3. Send the first reengagement message
4. Wait a few days- a week
5. Send a follow up message to anyone who didn’t respond to the first one (or call them)
6. Wait 1-3 more days
 - a. Send mail message & leave voicemails if no one answers
7. Last point of contact

Side notes:

If a customer doesn’t want you to call them back, make a note with their contact information that marks them as “Called once, don’t call back”

If a customer isn’t free to talk then schedule a call back

If a customer doesn’t answer the first time then call back another day. If the second time they still don’t answer the phone, leave a voicemail.

If a customer is interested, tell them about our new services & referral program

Persuasive Conversation:

- “We haven’t spoken to you in a while and wanted to see how you are doing”
- “We are currently doing a referral program that is only for a limited time”
- “The sooner you make an appointment, the better we can help you”

Questions about this Project Report?

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CONTACT SHEETS: INDIA & MALAYSIA

These are all the contacts that I used and will be needed by the person who continues doing marketing and customer re-engagement. First is the India Marketing Team contact sheet. Second is the Malaysia clinician contact sheet.

| NAME | JOB TITLE | EMAIL | PHONE# (+91) |
|-------------------|---------------------------------|--|-----------------|
| Riddhi Deb | Senior Manager-Special Projects | riddhi.deb@porteamedical.com | 9632102020 |
| Kavita Chowkimane | GM Marketing | kavita.bc@porteamedical.com | 9449830485 |
| Chandana Das | Ph. | chandana.das@porteamedical.com | 8095920684 |
| Shaveta Sharma | Executive-Customer Engagement | shaveta.sharma@porteamedical.com | 9980799776 |
| Nagendra | Manager- Admin | nagendra.kv@porteamedical.com | 8861180999 |

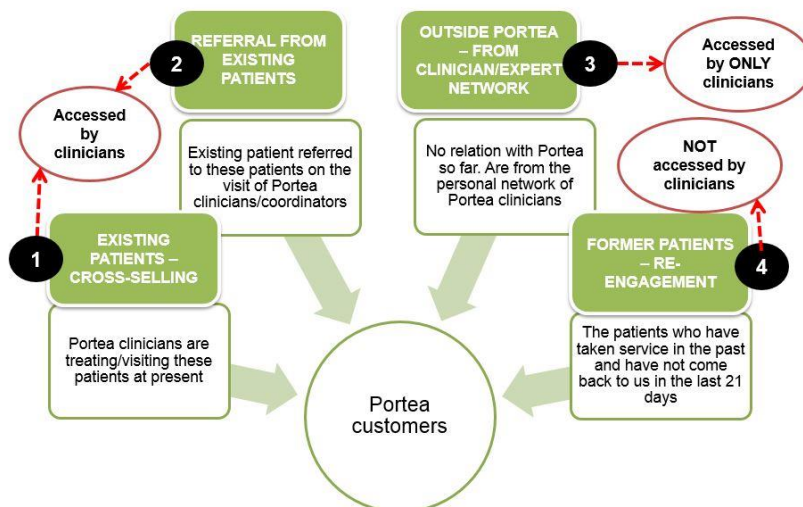
| FULL NAME | SEX | LANGUAGE | | | | JOB TITLE | WORK | EMAIL & PHONE NUMBERS |
|--|-----|----------|---------|-------|-------|-----------------|------------|--|
| | | ENGLISH | CHINESE | MALAY | TAMIL | | | |
| Malini tamilselvam | F | Y | X | Y | Y | Physiotherapist | Full time | Malanitsp21@gmail.com 0143673798 |
| Fazreen Shaeera Ismail | F | Y | X | Y | Y | Physiotherapist | Full time | Fazeera_baby@yahoo.com 0105262003 |
| Geetha Anbalagan | F | Y | X | Y | Y | Physiotherapist | Part time | geetha.anbalagan27@gmail.com 0166377901 |
| Ridzuan Idris | M | Y | X | Y | X | Physiotherapist | Full time | red9010@yahoo.com 0148542210 |
| Sofiah abu bakar | F | Y | X | Y | X | Physiotherapist | Full time | sofalba@gmail.com 0162112203 |
| Durka Retnam | F | Y | X | Y | Y | Physiotherapist | Full time | Durkaretnam@yahoo.com.my 0163261653 |
| Sharmila gunasaka | F | Y | X | Y | Y | Physiotherapist | Full time | sharmilamoir_5556@yahoo.com 0143205400 |
| Hemavathi | F | Y | X | Y | Y | Nurse | Full time | Shakti_hema745@ymail.com 0146431216 |
| Karunakaran rangaraj | M | Y | X | Y | Y | Physiotherapist | Full time | Karan_karuna@hotmail.com 0146207285 |
| James Alexander | M | Y | X | Y | Y | Physiotherapist | Full time | jameslxnder@gmail.com 0103714352 |
| Vikneswari sockalingam | F | Y | X | Y | Y | Physiotherapist | consultant | vicky7_gal89@hotmail.com 0105642117 |
| Farhana matzaki | F | Y | X | Y | Y | Physiotherapist | Full time | fmatzaki@yahoo.com 0176972159 |
| Noashikin | F | Y | X | Y | X | caregiver | | NO EMAIL ADDRESS 0135979201 |
| Gishalene | F | Y | X | Y | Y | Caregiver | | NO EMAIL ADDRESS 01136334168 |
| Nor asiah | F | Y | X | Y | X | Physiotherapist | Full time | asiahmohamad9386@gmail.com 01132207545 |
| Zalikhah nashuha | F | Y | X | Y | X | Physiotherapist | Consultant | zalikhanashuha@yahoo.com 01111170804 |
| Lee choon vik | M | Y | Y | Y | X | Physiotherapist | Consultant | yik5566@gmail.com 0175502742 |
| Suzleana aziera | F | X | X | Y | X | Caregiver | | NO EMAIL ADDRESS 01126903769 |
| Zul halmi | M | Y | X | Y | X | Physiotherapist | Full time | amy_kdr@yahoo.com 01111777435 |
| Ahmad zakaria | M | Y | X | Y | X | Physiotherapist | Full time | Zack_myliife@yahoo.com 0194345301 |
| maziah | F | Y | X | Y | X | Physiotherapist | Full time | maziahmamat@gmail.com 0199635664 |
| Nor baznini | F | Y | X | Y | X | Nurse | Part time | baznini@yahoo.com 0102931586 |

Questions about this Project Report?

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NOTES FOR UNDERSTANDING CUSTOMER ENGAGEMENT

The diagram below is a simplified visual illustration of how customer engagement channels work. Please use this model as an example for understanding the steps of customer engagement.



Referral policy & collection [For more info, please refer to page 7: Patient Referral Program]

- Referral campaign for customers
- Incentive structure for clinicians

Cross Selling

- Different incentive possibilities
- Close Work Group
- Coordination Support
- Create LTV (Life Time Value) for the patients

Extension of Service

- Structure – personalized approach
- Extending patients with 2 to 5 visits – basis medical requirement

Reconnecting with former long term patients

- Call people with at least 10 visits in the past
- Create system for making contact with patients
- Compare percentage of leads vs. percentage of conversion patients
- Identify demographics: age group, health issues/disease, and interval of engagement

Encourage them to join Portea

- Share revenue with clinicians as per market practice
- Spread the word

Questions about this Project Report?

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FAQ: FREQUENTLY ASKED QUESTIONS

How do you engage customers?

How you engage your customer is based on what they need/want and what services we can offer to them based on their condition. All of the options for implementing these different methods of engagement have been listed above already.

1. *Extension of service*
2. *Cross Sell*
3. *Collect referral*
4. *Encourage them to join Portea*
5. *Re-engage/Resume service*

What is KRA?

Key Result Areas. KRA is used when gathering information to create cross selling incentives.

What is ARPU?

Average Revenue Per User, movement calculated based on reach out for referral collection.

What is conversion?

These are the patients who try our service for 1-3 times that end up purchasing a service package. They have converted from being a lead (first time patient) to being an existing patient that frequently uses the services.

What are some good referral channels?

There are several referral channels to get more patients to participate in referral programs

1. *Slab based incentive*
2. *Revenue sharing for patient: personal network synced with market practice*
3. *Focused interaction with top cities (in this case, Kuala Lumpur)*
4. *Dedicated resources: deliver the leads*

Questions about this Project Report?

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ADVERTISING/MARKETING PLANS & IDEAS

This section highlights some of the ideas that I thought of during the project but didn't have the time or funds to implement from advertising, Portea merchandise, giveaways, and much more.

Short Term (2015)

- Newspaper & Health Magazine ads
- Twitter account: Social Media Advertising
- Local Malaysian website, add a blog section, video section (commercials & acting skits/TV broadcast)
- Portea Merchandise to give to customers who sign up for a package service plan: T-shirt, magnet, at home mug, travel size first aid kit, and/or recyclable tote bags.
- Portea Merchandise for non-customers at events to advertise our service: flyers, pens, mini staplers, notepads, portable power banks, and/or portable thermos mug.

Long Term (2016-2020)

- KL Sentral: on monorail and in stesen, commercials on the big screens, escalators, and on the indoor billboards at the exits/entrances, in order to send a subliminal message that anyone can use our service
- Penang: to create outreach to 41% Chinese population with ads that display trust of Chinese physiotherapists, caregivers, and nurses on a larger scale to see if that's actually the target we are missing in Penang.
- Ipoh & Johor Bahru: use our clinicians to get the word out. Give them a different flyer to hand out every month and have them report on if we have more, less, or the same number of leads based on the type of advertisements handed out.

Questions about this Project Report?

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