

Cureatr 2023 Performance Improvement Plan

5/2/2023



We see it. We are on it.

- Since 2020, SinfoniaRx performance against MTM CMR customer completion targets and STAR cut points decreased significantly, to the tune of a 15% overall decline in MAPD completions from 2020 to 2022.
- In early 2023, leading up to Cureatr's acquisition in early March, SinfoniaRx was performing at higher-than-previous-years completion percentages although following the acquisition, that progress plateaued.

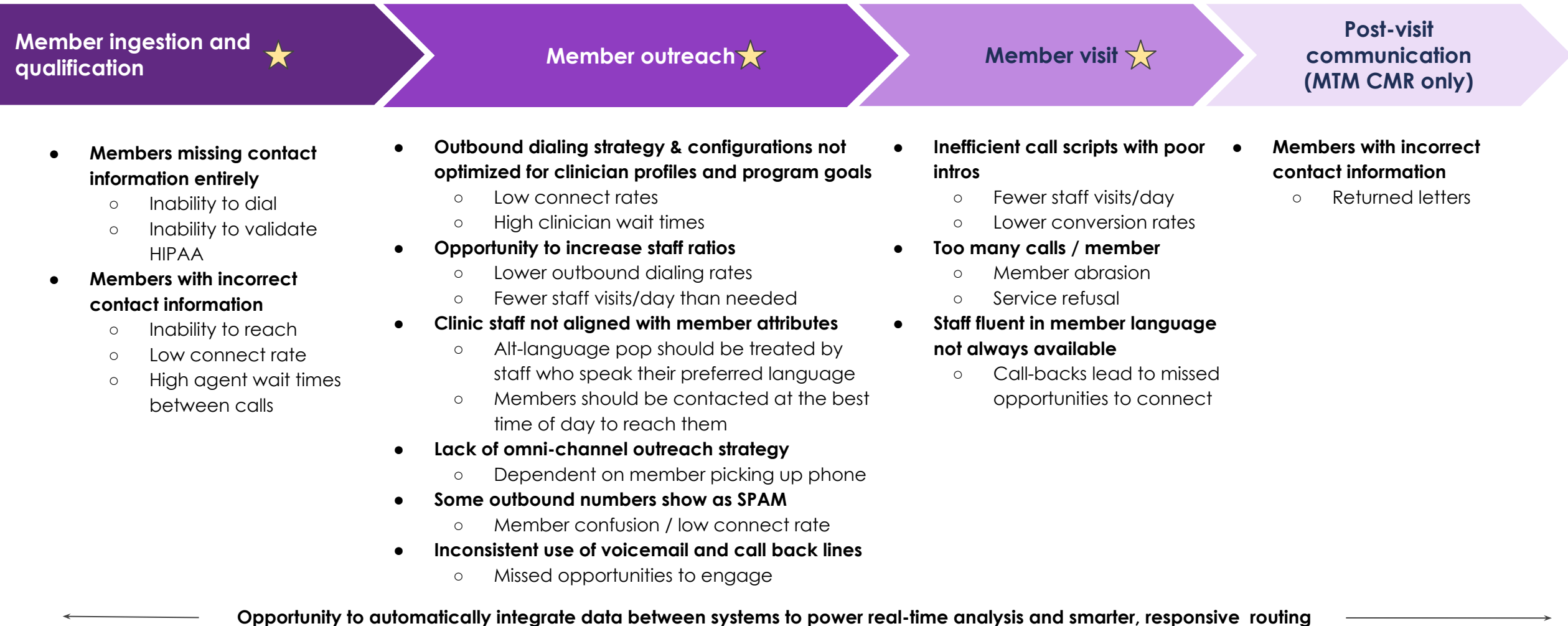
We are acutely aware of the historical decline and the recent plateau in performance; Cureatr is working relentlessly to turn this around in 2023 in order to deliver against customer targets/STAR cutpoint goals and remain your vendor of choice.

The 2023 completion curve will look a little different.

As a result of March acquisition activities, we are **shifting our target completion curve to the right for 2023**, which means doing more CMR volume towards the middle of the year. We have a plan in place to catch up on CMR volume through a **significant surge of variable staff starting in mid-May**.



Diagnosing and prioritizing the challenges.



What are our biggest levers to pull to address the biggest challenges?

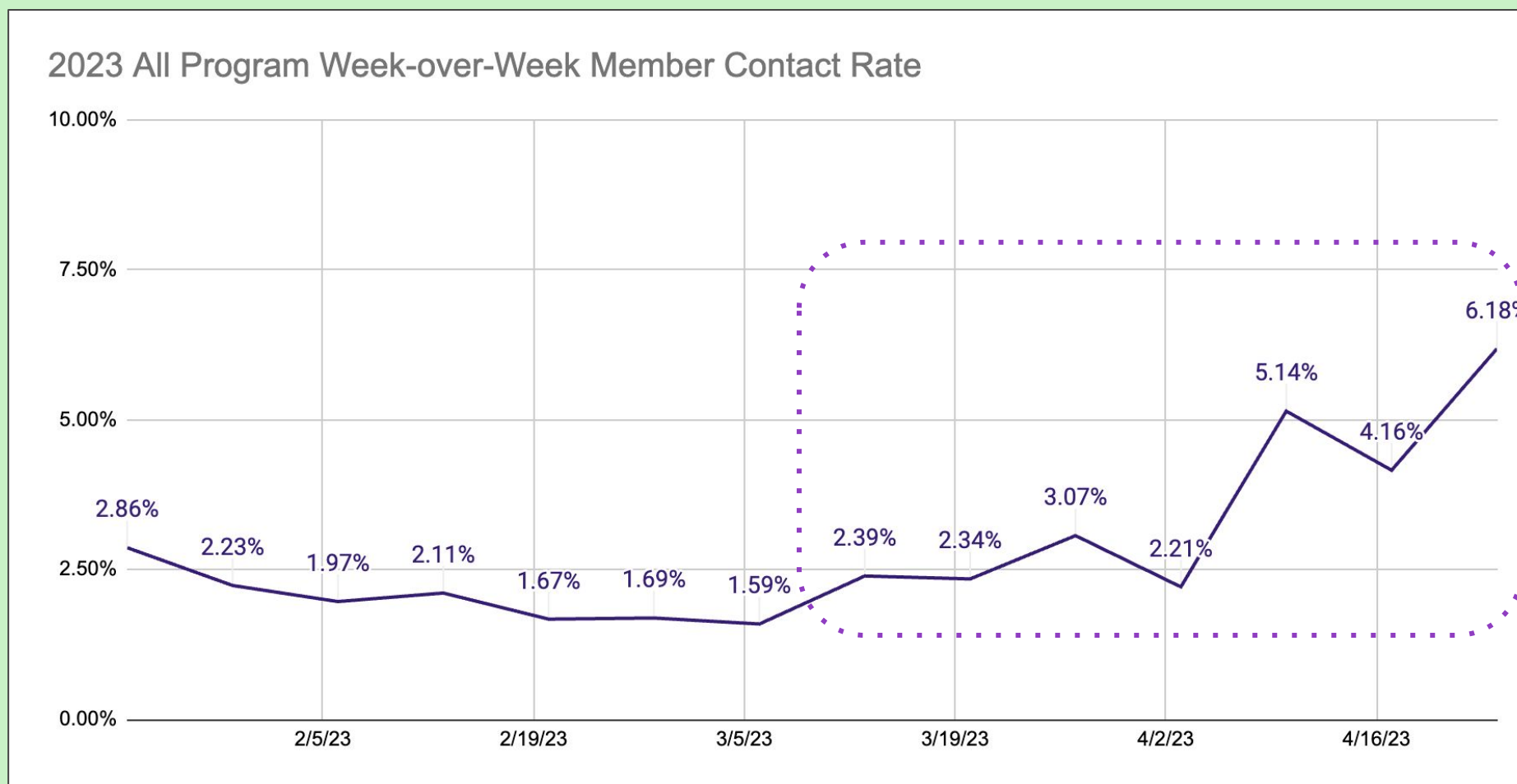
Our services hinge on the ability to connect to a person on the other end of the line. Across our programs, we have an average **13% bad phone number rate**, with a goal to decrease this number to 5% by year-end.



Cureatr investing in higher staff ratios allocated to each customer, onboarding an **additional 65 FTEs by mid-May** to ensure customers hit their targets.

Dialing strategy has not yet been optimized to reach our customers' goals. Our YTD **contact rate averages 3%**, and our goal is to bring it up to 20% ASAP. Average clinician wait times hover at 35%, which we plan to bring below 10%.

We have already begun to implement solutions targeted at each of these 3 areas, and will continually iterate to ensure throughout 2023 and beyond.



Since acquisition, our data & dialer optimization work has already driven a 3x contact rate improvement.

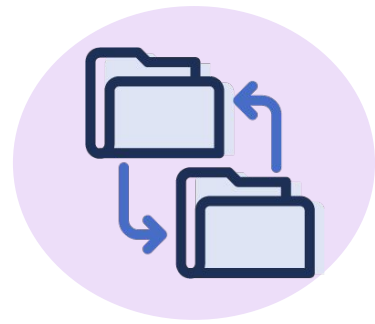
	March-April	May-June	July-August	Q4
Right-Sized Staffing	Hire 40 FTEs ✓	Hire additional 30 FTEs		Continually re-evaluate staff against current & future programs; hiring as needed
	Assess staff vs. patient languages spoken ✓	Support for BYOD to drastically expand virtual hiring pool & quick onboarding ✓	Forge strategic relationships and increase staffing pool through additional university partnerships	
	Formalize hiring referral program with bonuses for staff fluent in alt-languages ✓	Hire Director, Clinical Training , to streamline onboarding & training ✓	Make additional investments in workforce mgmt. software & tools to automate staff forecasting needs, shift times, etc. against program demands	
	Hired Manager, Talent Acquisition ✓	Launch staff incentive program against key performance metrics ✓	ID vendor for call quality analysis and agent feedback to drive conversions	Optimize QA process to tailor training towards successful patient outreach
Accurate Member Data	Baseline no & bad phone # rate overall & across all programs ✓	Re-launch Prove for MTM CMR (phone # mining for members missing phone #s) ✓	Redefine bad phone number and ability to identify unreachables	
	Launch PureCallerID DataBoost phase 1 across all programs (remove bad phone #) ✓	Launch DataBoost Phase 2 service across all programs (phone # ranking) ✓	Automate outreach dialer list loading Build smart prioritization and routing based on call dispositions, best times to reach, etc. Completely reconfigure outreach dialer campaigns to meet program goals Experiment w/ redial durations & tailor outreach cadences accordingly Overhaul alt-language routing process	
	Hired attl Senior Product Manager dedicated to optimization efforts ✓	Experiment with supplementing phone #s via CCDA channel ✓		
Optimized Outreach Strategy	Hired Director, Telehealth Operations ✓	Complete audit of current dialer list loading process ✓	Sign & implement w patient engagement vendor Launch SMS & Email for MTM CMR	
	Extended PureCallerID service across all programs (SPAM reduction) ✓	Revisit Agent and voicemail scripting to increase conversion rates ✓		
	Investigate dialer dispositions ✓	Streamline dialer dispositions ✓	Launch provider-first outreach Automate LTC process	
	Define all business/ dialer metrics needed to baseline & run call center ✓	Run RFP process for omnichannel pt engagement vendors ✓		
	Implement dialing ‘power hours’ based on best contact blocks for specific programs ✓	Continually align staff and shifts against optimal connection times and member languages spoken		

Right-Sized Staffing: Highlights



- We are **hiring an additional 65 Clinical FTEs by May 15** to support both CMR & STAR programs
 - Getting to our baseline staffing level is imperative to deliver on customer target goals and to help diagnose performance optimization opportunities independent of # staff (e.g. data/dialer optimization opportunities).
 - Will start to reap the benefits of new Clinic staff at the end of May.
- In April, we launched multiple strategies to increase ramp speed:
 - Internal referral incentives
 - Sign-on bonuses for open requisitions for candidates fluent in **Chinese (Mandarin or Cantonese), Korean, Spanish, or Vietnamese**
 - Development of security protocols to **support bring-your-own-device (BYOD)**, allowing us to hire pharmacy interns nationwide, not tethered to physical location
- Our new **Manager, Talent Acquisition** started on 4/17
 - Will be championing a refreshed strategy on partnering with pharmacy schools to develop a strong pharmacy intern program and strong candidate pool

Accurate Member Data: Highlights



We have revived relationships with key SinfoniaRx vendors who offer complementary products that tackle the bad contact information challenge. These partnerships were paused by TRHC in early 2023 due to pending acquisition activities.



DataBoost provides automated, advanced record management:

- Validate phone # & address; confirms phone # is active with carrier
- Verify owner of record, location, status (flags if mismatch)

Bluewave launched DataBoost on all MTM CMR campaigns on **4/12**; they started rolling it out to STAR programs on **4/20**. *Our phone connect rate increased by 5% within the first week of launch!*



Prove Identity Manager actively monitors our member population for:

- Phone number changes
- Disconnects
- Line type changes
- Carrier Changes

Our engineering team is updating our integration with Prove which will allow us to receive updated and new phone numbers for members *with an associated rank ordering*. Estimated release in June.

Optimized Outreach Strategy: Highlights



- Our new **Director, Telehealth Operations** started on 4/10
 - Partnering with our consulting partner **BlueWave Technology Group** to analyze and refresh our outbound dialing strategy, ensuring our dialing campaigns align with customer goals and patient attributes (see later slide)
 - Leading overhaul of our outreach and dialer metrics and working with BlueWave and internal Data Science team to create refreshed dashboards
 - Beginning to experiment with tailoring outreach & redial cadences to minimize potential member abrasion



PureCallerID provides advanced CNAM management

- Builds geo-based DID (outbound #) pools targeted at members' location
- Scrubs all outbound numbers for SPAM on weekly basis
- Handles CNAM, ensuring outbound #s are registered with all major carriers

PureCallerID is live for MTM CMR programs, but we began to enable it for STAR programs on **4/20**, which should reduce risk of outbound numbers appearing as SPAM, thus increasing connect rates.

Optimized Outreach Strategy: Highlights



- Completed initial analysis of best connection times for our member base; in the process of tailoring our staffing schedules against these trends, and launched **targeted power hours** for programs on 4/26
- Analyzing **call and voicemail scripts** to identify any areas to drive efficiency; setting up additional inbound call lines for programs without
- Planning to launch **provider-facing outreach** in early May for cognitively impaired members
- Early stages of planning a **pilot to launch SMS outreach** to members



Sample heatmap of call values by date, day, time