

Mutual Success Marketing with Cleo

At Cleo, we believe that high engagement is the primary driver of a sustainable benefits strategy. Cleo's Mutual Success Marketing plan is designed to foster a proactive partnership because we know that when more employees enroll in Cleo, then entire organization wins.

Mutual Success Marketing increases enrollment and directly impacts your business goals as an employer, helping you:

- **Lower Healthcare Costs:** Cleo's clinical support and expert-designed LifePaths reduce high-cost medical interventions, such as avoidable ER visits and elective C-sections, and increase preventative care.
- **Drive Better Outcomes:** Proactive early intervention for conditions such as mental health and neurodiversity needs prevents minor issues from snowballing into costly claims or leaves.
- **Reduce Absenteeism:** Comprehensive caregiving support keeps employees focused and at work, reducing the high costs of "presenteeism" and burnout.
- **Maximize Benefits Yield:** Cleo acts as a hub, warmly referring employees to your other benefits (like EAPs or health plans), expanding the value of your entire benefits ecosystem.



The Enrollment to Savings Cycle:

Your eFile Data →
 Targeted Campaigns from Cleo →
 Engagement in the Cleo Benefit →
 Reduction in High-Cost Healthcare & Workforce Events



Leveraging Your Enhanced Eligibility File

To drive the targeted outreach that leads to comprehensive cost savings, Cleo requires a monthly eligibility file. This technical integration is the cornerstone of Mutual Success Marketing.

Why eFile Matters:

Data is the engine of engagement. Employers who specifically leverage enhanced eligibility files (eFiles) to power enrollment consistently see better results across four key metrics:

- **Increased Enrollment:** Automated, relevant outreach by life stage ensures employees sign up the moment they need support.
- **Improved Outcomes:** Data-driven triggers allow for proactive intervention before a crisis occurs.
- **Lower Costs:** Precision targeting reduces "noise" and focuses resources on high-impact health interventions, supporting members holistically.
- **Higher ROI:** A larger, more engaged member base ensures the greatest possible return on your benefit investment.



Required Data Fields:

- **Employee Email Address:** for direct, low-cost, high-impact communications.
- **Date of Birth & Gender:** for age-appropriate and relevant clinical resources.
- **Residential ZIP Code:** to connect employees with local, cost-effective providers and hyperlocal resources.
- **Health Plan Status & Type:** (e.g., Enrolled Y/N; Employee + Spouse/Family) to identify life scenarios and transitions that may trigger high medical spending.



Mutual Success Marketing Tactics Menu

To ensure the success of this plan, you will make selections from the the following menu of marketing activities your team will commit to leveraging. These activities are proven to increase enrollment and drive down long-term healthcare costs.

Category	Activity Description	Owner	Frequency
Launch Phase	Send two (2) "teaser" and "launch" emails using Cleo templates	Employer	Once at Launch
Direct Outreach	Enable Cleo Automated emails to unenrolled employees	Cleo	Quarterly
Data-Driven Alerts	Segmented emails based on data triggers (e.g., Back to School, New Addition)	Cleo	As Needed
Benefits Central	Feature Cleo on the main internal benefits portal/intranet with a direct link to enroll	Employer	Always-on
Educational Events	Co-host one (1) introductory or educational webinar with Cleo.	Both	Annually
Open Enrollment	Include Cleo materials in all OE and annual benefits materials	Employer	Annually
New Hire Strategy	Include Cleo info in onboarding materials to drive enrollment from Day 1 on the job	Employer	Always-on
Leave Management	Include Cleo in all parental, family, and medical leave paperwork/checklists.	Employer	Always-on
Ad-hoc Reminders	Send one message via Slack/Teams (e.g., Stress during Reviews, Company transitions, seasonality).	Employer	Quarterly

Ready to partner for mutual success? Reach out to your Cleo contact or visit hicleo.com today.