



## Communications Leader Thomas Schaffner

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# Professional Background

# About Me



I am an award-winning writer and communications leader with a history of delivering proven results in messaging, branding and content creation for organizations of all sizes. With a background in communications, public relations, marketing and change management, I have created and successfully implemented communications plans and campaigns for all types of audiences in multiple media settings.

As both a former member of the media and a company representative to the media, I have a unique perspective on how information is best delivered to employees, consumers and organizations with optimal results.

In addition, I have led internal teams and advised company leadership in media and communications best practices, created and managed employee and customer engagement programs, and established key messaging and brand within and outside of the organization.

*The following presentation is designed to showcase my professional experience and highlight some examples of my work throughout my career.*

# Professional Experience

## **Marketing Communications Manager**

**ATRIO Health Plans** (Nov. 2023 – Present)

## **Sr. Advisor, Change Management & Communications**

**Cigna** (Nov. 2020 – Nov. 2023)

## **Director of Corporate Communications**

**Optum/United Health Group** (Jan. 2011 – Jan. 2020)

## **Public Relations Manager**

**Siemens Healthcare** (Jan. 2008 – Jan. 2011)

## **Editor in Chief/Editorial Director**

**Valley Forge Publishing Group** (May 2002 – Jan. 2008)

## **Managing Editor**

**101 Communications** (Jan. 1998 – Feb. 2002)

Corporate, Internal, External & Executive Communications

Strategic Communications Planning, Branding & Messaging

Public & Media Relations

Employee & Customer Engagement

Web Site & Social Media Content

Crisis & Change Management

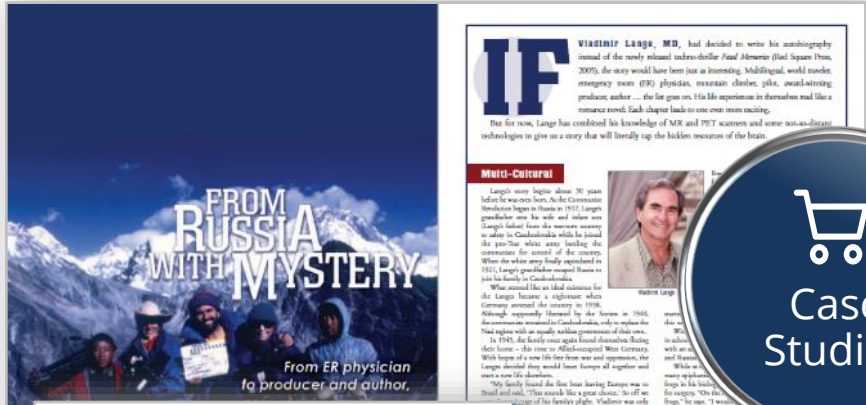
Writing & Copyediting

Staff Leadership

Marketing, Campaign & Event Management



# Award-Winning Writer



Reimbursement Management Update | August 2012

## OBSERVATION RATE METRICS: An Important Tool in Evaluating Your Hospital's UR Process

By Ralph Wuebker, MD, MBA

Editor's Note: The article below has been used with permission from RAC Monitor [www.racmonitor.com](http://www.racmonitor.com), July 12, 2012.

Due to the complex and ever-changing regulatory landscape of contemporary healthcare, it is essential that hospitals and health systems have an efficient and timely method of utilization review (UR) process in place.

Outgoing checks of this review process are necessary to ensure compliance with the Medicare Conditions of Participation and contractual obligations with commercial payers.

By effectively examining a hospital's data, the UR committee can predict compliance risk and the cost of an audit.

Observation service metrics and inpatient status rates can be calculated in different ways to find the most appropriate measurement value. For example, the most important areas to evaluate are:

- Continuity and quality of the facility's review process.
- Case at risk for audit (especially short-stay cases), and
- Observation or inpatient metrics that fall outside of normal ranges.

When evaluating an observation rate, it is critical to perform the "numerator" calculation. Data for this measurement can be drawn from case management/quality data, hospital case information, and/or claims data.

The best metric by which to evaluate Medicare audit preparation is a facility's Medicare FFS medical observation rate.

There is no one set national standard, as the rate can vary from facility to facility based on patient profiles, physician practice patterns, and hospital location. However, if a facility's rate is too low, it could imply an increase of inpatient status, which creates a greater risk for a government audit by RAC, MAC, or OIG, or DOJ, etc.

If a facility's observation rate is too high, it could be representative of an inconsistent or incomplete review process. A high observation rate also could affect quality and

**IF** Vladimir Langa, MD, had decided to write his autobiography instead of the newly released techno-thriller *Fatal Attraction* (Dial Square Press, 2009), the story would have been just as interesting. Multilingual, world-traveler, emergency room (ER) physician, musician, dancer, pilot, award-winning producer, author... the list goes on. His life experiences in themselves read like a romance novel. Each chapter leads to one over-the-top exciting...  
For now, Langa has combined his knowledge of MR and PET scanners and some neuro-linguistic techniques to give us a story that will literally tap the hidden messages of the brain.

### Multi-Cultural

Langa was born about 30 years before we were born, in the Communist Republic of East Germany in 1942. Langa grew up in a small town in East Germany, where he was the only child. He moved to the United States in 1968, where he worked as a translator and interpreter.



Vladimir Langa

When asked for an ideal scenario for the Langa became a physician, when Germany entered the country in 1998. Although reportedly flattered by the honor in 1998, Langa declined the offer. He has since moved to the United States and is now a resident in the United States. He has since moved to the United States and is now a resident in the United States.



## THE LEARNING NETWORK CONTINUES TO GROW

It's hard to believe that it was only two-and-a-half years ago that I sat in a room with a team of my Optum360 colleagues and proposed an idea of creating a client program that provides, not only feedback on our products and services, but an organization where its members can discuss the issues impacting their jobs and their facilities, and share best practices with their peers with a common goal of improving the healthcare experience -- a Learning Network.

Since that time in 2017, we have seen our inaugural Optum360 client program from our Optum Physician Advisor Solutions (PAS) business grow from a small client group of just over 200 members to become the Learning Network, now, more than 2,000 members strong. Built on the pillars of locale, innovation, and Collaboration, the Learning Network has grown into an institution where the power of knowledge is not only important to have, but just as important to share.

I am especially happy to welcome our Computer Assisted Coding (CAC) and Clinical Documentation Improvement (CDI) technology clients into the Learning Network, so they may also share in all of the benefits and resources that the Learning Network has to offer. In fact, just a few weeks ago, the Learning Network hosted its first joint regional conference in Williamsburg, Va., with both our PAS and CAC/CDI clients attending. You can read more about it in the accompanying article in this newsletter.

The Learning Network offers members the opportunity to build a foundation and help them grow in their professions through webinars, regional conferences, continuing education credits, newsletters, industry articles, white papers, discussion forums, community sites, and soon -- something I am particularly excited about -- podcasts. Our Learning Network members have been essential in sharing their knowledge through presentations on our webinars, at regional and industry events, and providing commentary through various media outlets.

Through our Optum360 subject matter experts, the Learning Network continues to tackle the topics relevant to our members, including the use of artificial intelligence in healthcare, value-based care and payer-provider friction. In addition, special events, such as Optum Forum, our premier industry event of the year, raise the bar even higher with panel discussions and focused breakout sessions.

In the coming months, we'll let you know more about the exciting things we have planned for the Learning Network as we move into 2020. So, as 2019 winds down, on behalf of the entire Optum360 team, I want to welcome our CAC and CDI clients to our community, as well as thank our Optum Physician Advisor Solutions members for their continued dedication to the Learning Network. Here's to another great year in 2020.

*Bill Scatthard*  
Senior Vice President, Client Engagement  
Optum360

Optum360 Learning Network



To view writing samples, visit <https://tomschaffner.com/media-portfolio/>

## Medical necessity review: Compliance in a new era of accountability

By Robert R. Corvato, MD, MBA, David Hoffman, Esq., and Michael Taylor, MD

Editor's note: Robert R. Corvato is President and Chief Executive Officer with Executive Health Resources in Newmarket Square, Pennsylvania. He may be contacted by e-mail at [corvato@ehrc.com](mailto:corvato@ehrc.com).

David Hoffman is President of David Hoffman & Associates, PC.

He may be contacted by e-mail at [droffman@dha.com](mailto:droffman@dha.com).

Michael Taylor is Clinical Operations Health Resources in Pennsylvania. He may be contacted by e-mail at [mtaylor@ehrc.com](mailto:mtaylor@ehrc.com).

The fact is, in the past few years, health care has been through a lot of changes. As a result, hospital era of health care is changing. The industry is being forced to reduce or eliminate overpayments and suppliers.

**MRI Imaging**  
While MRI imaging has been a staple of medical diagnosis for decades, the use of MRI in the past few years has increased significantly. The use of MRI in the past few years has increased significantly. The use of MRI in the past few years has increased significantly.

**Medical Necessity**  
Medical necessity review is a process that ensures that the services and supplies provided to patients are medically necessary. It is a process that ensures that the services and supplies provided to patients are medically necessary.

In today's environment of increased health care scrutiny and accountability, it is more important than ever for hospitals to maintain a strong, concurrent compliance review program to ensure appropriate utilization of inpatient services.

**Expanded power to fight overpayments, fraud, and abuse**  
In addition to subjecting providers and suppliers to increased scrutiny through programs, such as Recovery Audit Contractor (RAC) and Zone Program Integrity Contractor (ZPIC) review, the government has simultaneously strengthened its ability to deal with suspected fraud.

**The Evolution of Stem Cell Research**  
Stem cell research has been a hot topic in the scientific community for years. It has the potential to revolutionize the way we think about medicine and health care.

**1948** - First ability to name transferrin successfully via an experiment of serum combined immunodeficiency (CVID).

**1981** - A decision of mouse embryonic stem cells are produced.

**2004** - The use of mouse embryonic stem cells are generated.



## CLIENTS COME TOGETHER IN WILLIAMSBURG

Williamsburg, Virginia is famous as a living museum of American life in the 18th century, complete with restored buildings, carriage rides and skilled craftsmen and women, sharing their knowledge with visitors throughout the year. On November 13, 2019, Optum360 clients from the Physician Advisor Solutions (PAS), Computer Assisted Coding (CAC) and Clinical Documentation Improvement (CDI) businesses continued this theme of knowledge sharing at the Learning Network Regional Conference, held in the heart of historic Williamsburg.

After breakfast, the conference officially began with a welcome from Bill Scatthard, Optum360's Vice President of Client Engagement, who gave an overview of the current healthcare landscape and the potential impact this could have on our customers. Following this, the Assembly Board's Managing Director of Research, Eric Fontana, delved into what every organization needs to do in order to transform their revenue cycle.

With individual client needs in mind, the agenda then shifted to breakout sessions for either our PAS or our CAC/CDI attendees. PAS attendees saw a wide range of topics covered, including sessions on clinical denials mitigation, the use of artificial intelligence (AI) in utilization review (UR), the latest advances from CAC and its contractors, and a special client presentation from Sentara Healthcare on how to regain your facility's UR to help improve outcomes.

For our CAC/CDI attendees, sessions examined how Natural Language Processing (NLP) and AI can assist CDI and coding professionals, the reimbursement landscape and its impact on their facilities, and the important role of denials minimization to help secure margin imperatives.

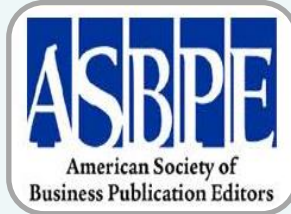
Of course, one of the highlights of every Learning Network regional conference is the special luncheon tour. Since the conference center was located in the heart of historic Williamsburg, attendees only had to walk across the street to get a true taste of life in America 300 years ago.

"We want to give our attendees a chance to recharge their batteries after a morning of sessions," said Bill Scatthard. "Everyone comes back from the tours energized and ready to go."

In addition, attendees earned up to four continuing education credits for attending sessions throughout the day, and a few raffle winners left with Amazon Echoes or Echo Dots as a reminder of the event.

The 2020 Learning Network regional conference calendar will be available shortly. We hope you can join us at one of these events in the coming year.

# Awards & Recognitions



**American Society of Business Publication Editors Awards:** Radiology Directory (2005-2007); Cover Design (1998, 2000, 2005, 2007, 2008); Case History (1999); New Web Publication (2005); Opening Page/Spread (2005-2008); Individual Profile (2007)



**American Society of Healthcare Publication Editors Awards:** Case Study (2006); Radiology Directory (2006, 2007); Cover (2005-2008); Opening Spread (2007, 2008)



**Association for Publication Excellence (APEX) Awards:** Profile Article (2005); Technical Article (2006); Newsletter (2005); Cover (2007); Annual Radiology Directory (2006, 2007)



**Medical Marketing & Media Award** for marketing communications innovation in producing media exposure through an online auction benefitting the Children's Health Fund (2009)

## Awards & Recognitions (continued)



**Optum (United Health Group) Inspire Marketing Award (Finalist)** for the successful Optum360 rebranding campaign for the business unit (2019)



**PRSourceCode Award** for Siemens Healthcare U.S. as one of the top corporate public relations teams in the technology industry, as well as top honors in the healthcare sector (2010)



**Siemens Communications Award** (awarded across the global organization) for team collaboration and creativity in promoting the Siemens brand (2008)



**Trade Association Business Publications International Awards:** b2b Web Site (2008); Single Issue (2004); Cover (2004, 2005, 2007, 2008); Opening Page/Spread (2005, 2007, 2008); Department (2008); Radiology Directory (2006)



# Skills

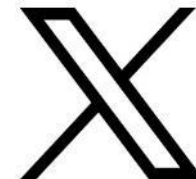
## Creativity and Connectivity

- Microsoft Office
- Adobe Pro / Creative Cloud
- Sharepoint
- Salesforce
- Cision
- Associated Press style
- WebEx
- Zoom
- Skype
- Microsoft Teams / Power BI

## Web CMS and Desktop Publishing

- Web Content Management Systems
- Umbraco
- Dreamweaver
- Weebly
- WordPress
- QuarkXPress

### *Social Media Platforms:*



# Certifications



**Prosci-certified Change Practitioner (2022)** – Teaches how to drive successful change initiative, create a change management strategy and plans, and to enable individual change and achieve organizational results and outcomes.



**Agile Change Agent (2021)** – Benchmarks the ability of project managers to deliver Agile projects in organizations that require standards, rigor and visibility around the Agile framework.



**Certified SAFe5 Lean Portfolio Manager (2021)** – Provides the guidance and tools needed to work effectively in remote environments with distributed teams by aligning strategy with execution.



**Pragmatic Marketing Certification (2016)** – Validates expertise in product management and marketing, emphasizing practical skills and actionable strategies for navigating the complexities of product lifecycle management.

# Internal Communications

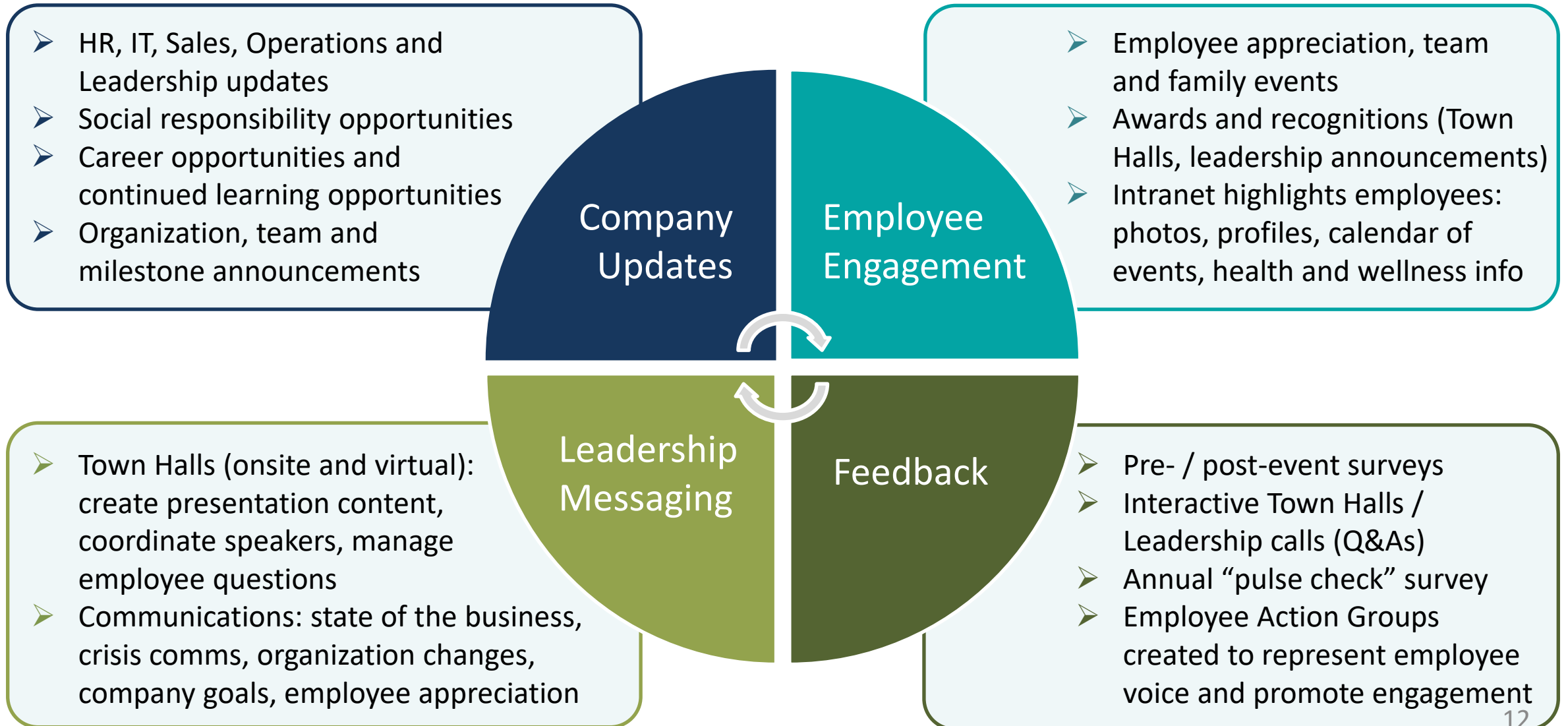


## 13 Years' Experience

- Corporate Communications
- Leadership / Manager Communications
- HR Communications
- IT Communications
- Change Management
- Employee Engagement
- Culture Programs
- Social Responsibility
- Intranet Content
- Employee Newsletters
- Town Halls
- Event Management

# Employee Communications

Responsible for all aspects of internal communications, employee engagement and promotion of company initiatives.



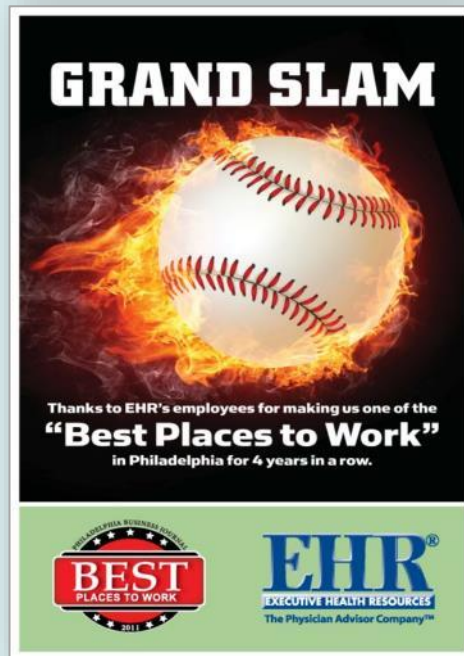


# Employee Appreciation Event Management

Examples of appreciation events and programs I led for the company for both onsite and remote employees.

## “Best Places to Work” Award

Celebration for 4 consecutive years of the award with a luncheon, raffles and giveaways



## Employee Golf Outing

Annual gathering for employees and family members for a day of golf



## Employees and Families Carnival

Annual event with food, games, raffles, giveaways, music and kids' rides



## Biometric Health Screenings

Promotion and set-up for employees to get free in-house medical screenings



# Social Responsibility Program Management

Social responsibility program examples I organized and implemented for the company's onsite and remote employees.

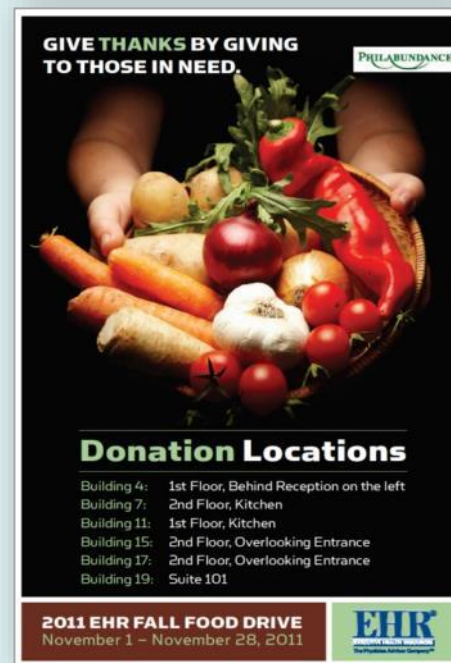
## Operation Gratitude

Candy, clothes, written cards and fun items collected for U.S. troops stationed overseas



## Philabundance Food Drive

Annual event to provide canned food for the homeless and underprivileged



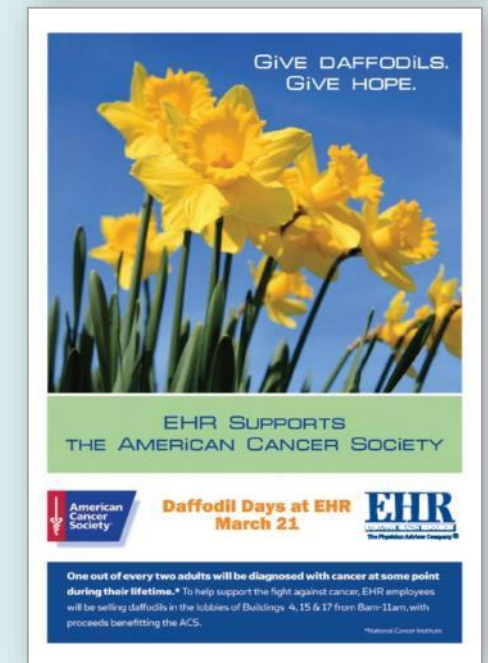
## Multi-Charity Support

Led efforts for our UHG business, where employees support favorite charities.



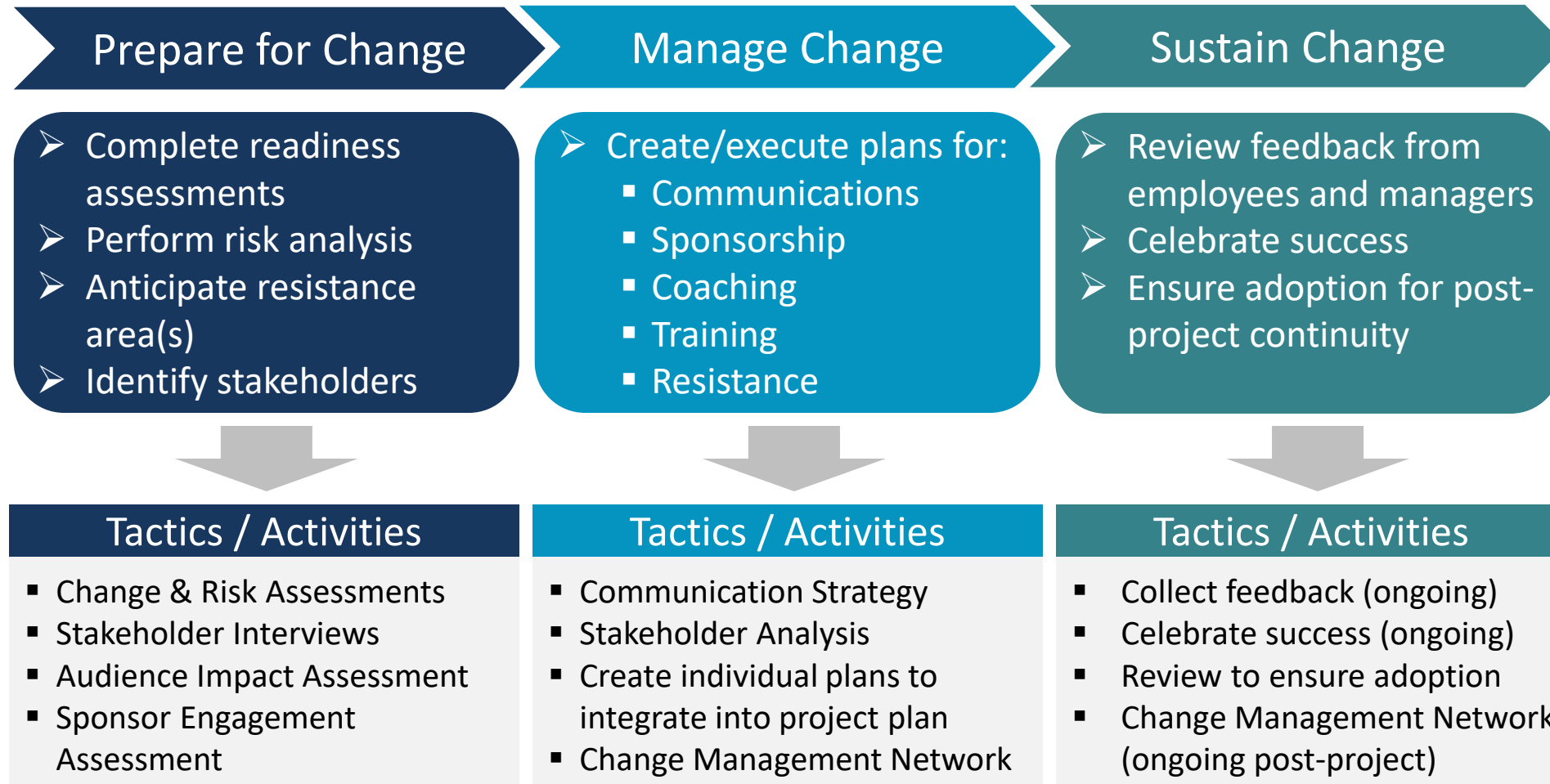
## American Cancer Society

Employees purchased flowers in our offices, benefitting the American Cancer Society.



# Change Management – Cigna

Working with internal teams, I created and implemented plans to help employees understand the reasons for transition or transformation within the organization and adopt these changes into their daily work. This includes resistance to new technologies, role/process changes and organizational restructuring.\*



Certified in the use of:



Prosci methodology



Agile methodology



ADKAR model

\*This is a sample project only. Each project was customized, based on customer's needs and assessments throughout the project's lifespan.



# External Communications



## 22 Years' Experience

- Corporate Communications
- Partner Communications & Newsletters
- Media Relations, Pitching & Placement
- Branding / Rebranding
- Key Messaging
- Partner / Vendor Appreciation
- Press Releases
- Web Site & Social Media Content & Strategy
- Product & Services Highlight Sheets



# Media Experience

I have worked as both a member of the media and, later, as a representative to the media. This experience has taught me the best ways to craft a message and deliver it to the right audience for maximum impact.

## Journalist

- 24 years as reporter, writer, managing editor, editor-in-chief and editorial director
- 10 years of publishing experience
- Bylined and ghost-written articles for leadership
- Content planning, targeting audiences
- Staff management (editors, graphic designers, freelancers, interns)
- Industry awards for article writing, magazine design, web site content, newsletters and media exposure

## Media Representative

- 16 years' experience
- Media relations representative for Siemens Healthcare, Executive Health Resources, Optum/United Health Group and ATRIO Health Plans
- Earned media, crisis management, media pitching, media events, spokesperson
- Experience working with traditional and electronic media (national and trade), television, social media, national and global organizations

*To view writing samples, visit <https://tomschaffner.com/media-portfolio/>*

# Media Relations Campaign – Siemens (2008-2010)\*

I directed this six-month media campaign annually, promoting Siemens Healthcare's business divisions' leadership, products and services at the annual Radiological Society of North America (RSNA) conference (>60,000 attendees annually).

## Business Units Represented:

- Medical Imaging & Oncology division
- Healthcare IT division
- Laboratory Diagnostics division

## Press Releases:

- 34 press releases distributed nationally and internationally
- 14 new products launched
- 70 Siemens leadership and subject matter experts quoted

## Media Booth Tours:

- 162 booth tours for trade and national media reporters, professional association representatives and industry analysts
- 141% increase in number of booth tours over three-year period

## Media Breakfast Briefing Event:

- Media from the Americas, Europe and Asia provided exclusive access to leadership in an intimate setting
- Exclusive 1-on-1 interviews available to attending press

*\*totals over a three-year period*



The Siemens Hall



Media breakfast



Booth traffic

# Media Placement Campaign – Executive Health Resources/Optum (2011-2015)

I led the ongoing program to increase the company brand/promote our leadership and subject matter experts in the industry.

## Strategy (Print/Online Media):

- Increase company brand and subject matter experts in traditional and online media through proactive pitching.

## Tactics:

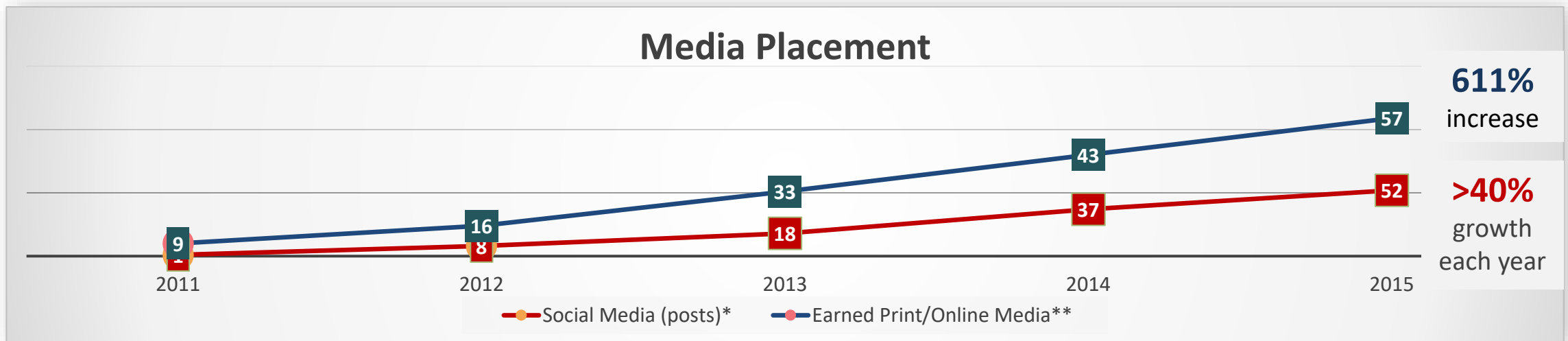
- Identify subject matter experts/topics for media availability
- Expand media outreach on hot topic industry issues
- Articles from speaking engagements for media placement
- Pitch to professional organizations for company-authored articles for inclusion in member newsletters

## Strategy (Social Media – initial platform: Twitter):

- Establish (Dec. 2011) company's initial social media presence through expert content and in discussion forums.

## Tactics:

- Identify key industry forums for thought leadership content
- Establish a positive experience on Twitter through engaging tweets that link to helpful company resources and content
- Implement a communications strategy of regular tweets (proactive, reactive and evergreen topics) to maintain brand



\* # of new forum and Twitter posts

\*\* proactive and reactive media articles



# Press Releases

Press release examples I created and coordinated the distribution of for local and national media coverage.

**EHR**  
EXECUTIVE HEALTH RESOURCES  
AN OPTUM COMPANY

### Congressman Pat Meehan Joins Executive Health Resources at the EHR University Grand Opening

*EHR Opens the Doors to a New Training Facility for Employee Excellence and Enhanced Customer Service*

NEWTOWN SQUARE, PA, December 5, 2011 - Executive Health Resources (EHR), The Physician Advisor Company™, held its Grand Opening today of EHR University, a new training and education facility in Newtown Square, Pa. Employees and dignitaries from around the area joined Rep. Pat Meehan (PA-7) and EHR President and CEO Robert Corrado, MD, MBA, to celebrate the ribbon cutting event.

"I am honored to participate in EHR's ribbon-cutting celebration and to recognize the high value that EHR places on employee education and customer service to their hospital clients," said Rep. Meehan. "In 2011 alone, EHR has created more than 1,000 jobs, mostly in the local area, giving a great boost to the economy and health of the region. I would like to extend my congratulations to the entire EHR team for their continued success."

EHR University will serve as the training center for all new EHR employees, many of whom are physicians and nurses, to gain expertise in their dedicated areas. According to EHR's leaders, employee education is one of the organization's top priorities, and ensures that each employee is expertly trained in the specifics of their job to provide the highest quality of care.

**SIEMENS**

### Siemens Premieres National Customer Headquarters for 24x7 Service and Support

Political dignitaries, media and guests attend grand opening at Cary, N.C.

NEWS PROVIDED BY  
**Siemens Healthcare**  
Apr 19, 2010, 09:00 ET

CARY, N.C., April 19 /PRNewswire/ -- Employees of Siemens Medical Solutions welcomed political dignitaries, the media and other guests from the surrounding area at the grand opening of its new national customer service headquarters in Cary, N.C. The new facility will better facilitate Siemens' customer commitment to 24x7 service and support on their medical imaging equipment and software.

The new facility is a 143,000-square-foot, six-story office building located on a site at the Cary Medical Campus, which also includes two training and development centers, a 700 technical and administrative support personnel, a new expanded facility can house more than 700 technical and administrative support personnel, a new 600-car parking deck and a separate one-floor cafeteria. The new expanded facility includes a 1,000-sq-ft call center, Regional Support Center, clinical education center and a 1,000-sq-ft call center.

**EHR**  
EXECUTIVE HEALTH RESOURCES  
AN OPTUM COMPANY

### Executive Health Resources Named a "Best Places to Work" for a Fifth Consecutive Year

*Philadelphia Business Journal's Prestigious Award Honors Companies in the Philadelphia Area*

NEWTOWN SQUARE, PA, October 11, 2012 - Executive Health Resources® (EHR) is recognized as one of "Best Places to Work" in Philadelphia by the Philadelphia Business Journal for a fifth consecutive year. EHR received the Bronze award in the Extra Large Company category, which included companies with more than 1,001 employees working in the Delaware Valley.

The annual awards program ranks the top employers in the Delaware Valley, according to the companies by their own workers. The "Best Places to Work" award recognizes an ongoing commitment to its employees in maintaining a positive company culture and a focus to help these individuals grow within the organization. In addition, the "Best Places to Work" award serves as a reflection of companies at their best, and their willingness to recognize and reward their employees, and reward them for their hard work and dedication.

"The continued success of EHR is due, in no small part, to the dedication and hard work of our employees. They are the cornerstone to our commitment to serve our customers and to provide the best possible way we know how," said Thomas Mercer, MS, President and CEO of EHR.

**SIEMENS**

### Siemens' Donation of Digital Radiography System Benefits Children's Health Fund

Online Auction Winner John T. Mather Memorial Hospital Presents CHF with check for \$285,000

Port Jefferson, N.Y., Sept. 17, 2009 – With a click of a button, the lives of thousands may have changed for the better. As the winning online bidder for a Siemens Healthcare digital radiography (DR) system, John T. Mather Memorial Hospital ([www.matherhospital.org](http://www.matherhospital.org)) in Port Jefferson, N.Y., today presented a check for \$285,309 to the Children's Health Fund (CHF) ([www.childrenshealthfund.org](http://www.childrenshealthfund.org)), a national organization dedicated to providing health care for homeless and medically disadvantaged children and advocating on behalf of all children. Mather Hospital's new Siemens DR system, the Ysio®, will allow the hospital to comfortably image patients of various shapes and sizes, ages and disabilities.

"We are extremely grateful to Siemens Healthcare for selecting the Children's Health Fund to benefit from the online auction of the Ysio and to Mather Hospital for making the important purchase," stated Karen Redlener, executive director, Children's Health Fund. "The funds donated

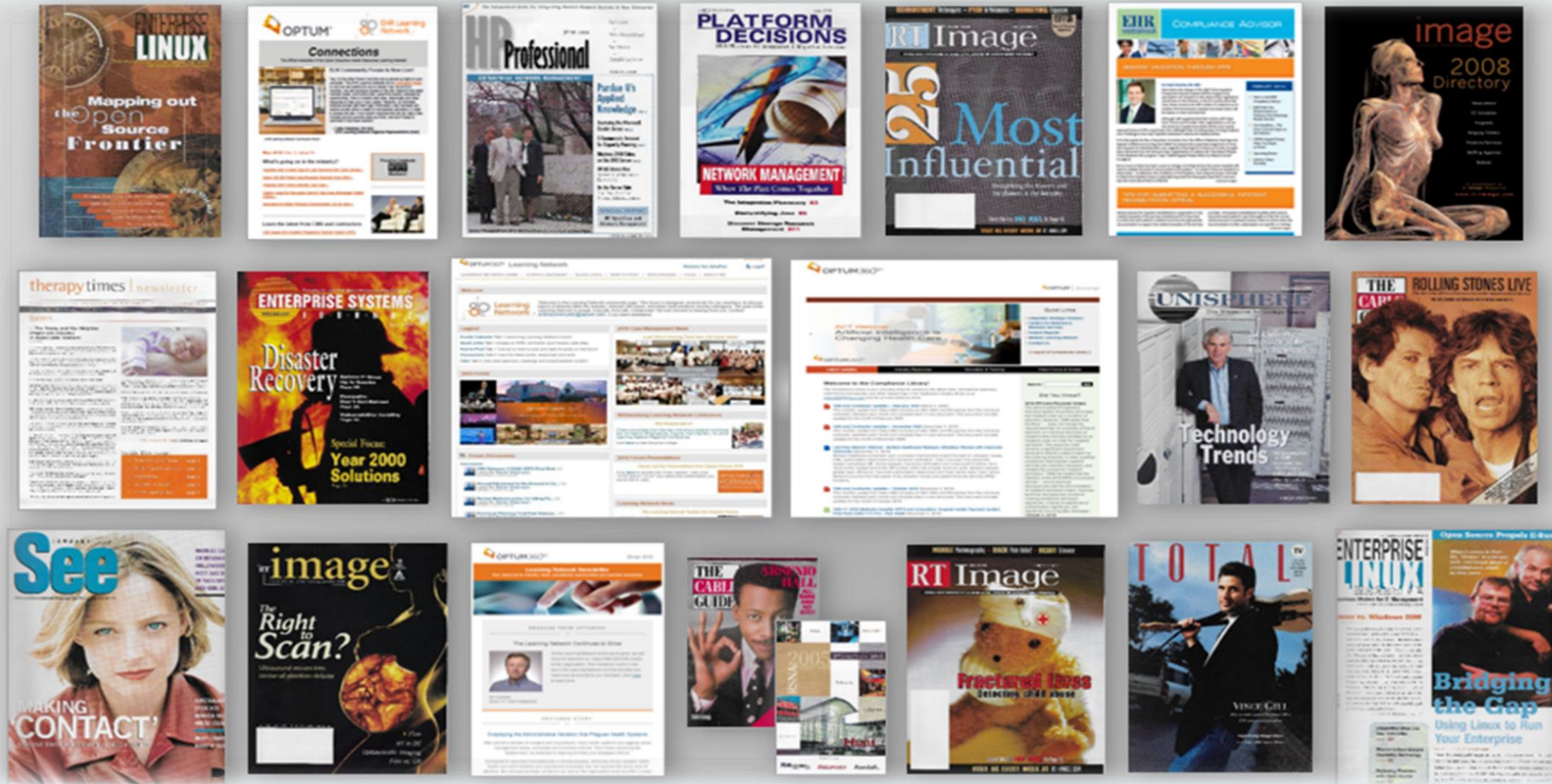
**PHILADELPHIA BUSINESS JOURNAL**  
**BEST PLACES TO WORK**  
2011

**EHR**  
EXECUTIVE HEALTH RESOURCES  
The Physician Advisor Company



# Media Production

In addition to a career as a writer, editor and content strategist, I have experience in all areas of print and digital media production, including magazines, newsletters, Web sites, video, podcasts and social media.





# EHR University Grand Opening – Executive Health Resources (2011)

I successfully organized the grand opening event of the company's new training facility – branded EHR University – inviting company executives, employees, political leadership and local and business media to promote bringing new jobs to the region.

- Media/politicians invited, citing the event's community importance
- Media kits produced for press distribution

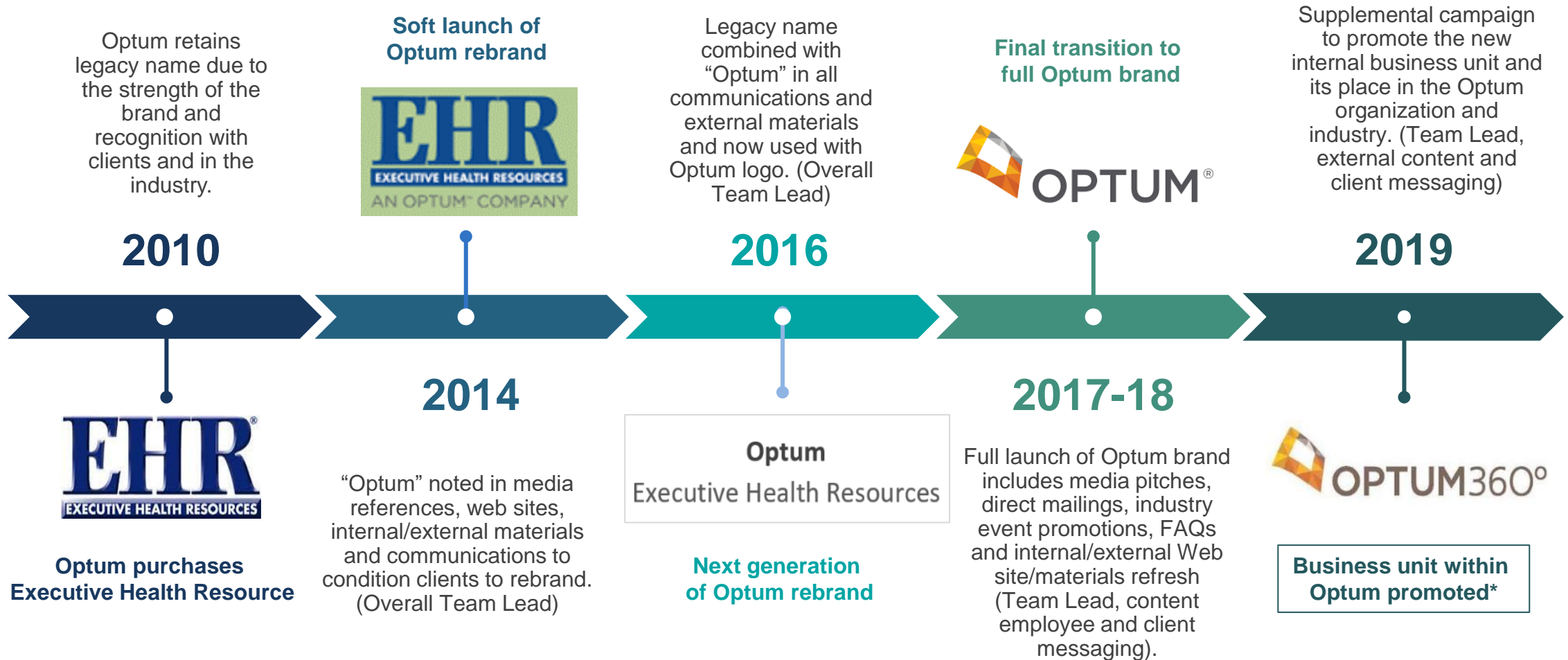
- Ribbon-cutting ceremony agenda planned/implemented
- Presentation content created for company leadership

- Press release (with leadership/politician quotes) distributed
- Media results tracked and presented to leadership



# Rebranding Campaign – Optum (2014-2019)

With the challenge of how to build awareness and gain acceptance from our employees, customers and partners, I held leadership roles on every phase of this long-term campaign to promote the gradual transition of the legacy organization and product portfolio to the Optum brand, demonstrating the value of Optum within the organization and throughout the industry.



\*2019 finalist for the Optum Inspire Award for campaign marketing

# Branded Items

Examples of a few of the company-branded items I coordinated the production of for promotions and events.



**Tote Bag** – This bag has been given out at all customer functions for clients to hold their company solutions materials and other items.

**Earbuds** – Mass produced and affordable, these earbuds were given out as booth draws at conferences, and one of the items placed in client attendee bags.

**Tumbler** – As part of the launch of a new client engagement group, this item was mailed in appreciation to all newly registered members as a welcome gift.

**Water Bottle** – Handed out to employees and customers as appreciation items and used as part of the new employee welcome package on their first day.

**Journal** – The leather-bound journal was mailed to client engagement group members during Customer Appreciation Day the first year of the program.



# Customer Communications

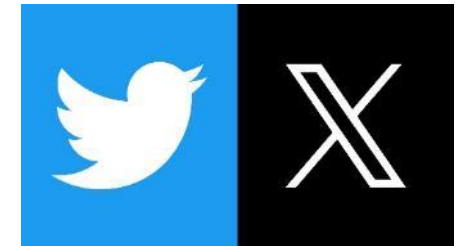


## 16 Years' Experience

- Customer Communications
- Customer Engagement
- Customer Advisory Groups
- Customer Appreciation Programs
- Web Site Content
- Customer Newsletters
- Education Courses
- Speakers Bureau
- Customer Success / Case Studies
- Event Management
- Marketing Collateral

# Customer Communication Channels

Examples of media avenues I have created and used to interact with our employees, customers and partners.



## Customer-exclusive Web Sites

- News, events and educational opportunities
- Discussion forums, solutions topics
- Exclusive resources, photos and downloads
- Site analytics and reporting

## Customer Newsletters

- Delivered to the client's inbox
- Exclusive information and resources for customers and employees
- News, events, tips and downloads

## Social Media

- LinkedIn, X (Twitter), Meta (Facebook)
- Discussion forums, blogs, podcasts, promotions and event information
- Site analytics and reporting



# Customer Event Management – Optum Forum (2017-2019)



I led the content creation, promotion and logistics for the business' premier industry conference. This three-day annual event gathered Optum customers for educational sessions, user group meetings and evening events.

## Communication

- Promotion through email, Web sites, social media and in-person events
- Leads to Sales/Account Management teams
- Attendee feedback via post-event surveys

## Education

- Presentation content, speaker recruitment and supporting materials
- Continuing education credits provided
- Customer speakers provide best practices

## Collaboration

- Peer-to-peer interaction and networking events
- Built stronger customer relationships through face-to-face interaction
- Attendee follow-up on questions and information

## Results

- 140% increase in annual customer meeting attendance
- 24% increase customer registrations
- 20% increase in continuing education credits offered
- 10% increase in overall conference rating



# Customer Event Management: Regional Conferences – Optum (2017-2019)

I directed the content, promotion and logistics for these events, offered in targeted cities throughout the country.

## Oversaw all aspects of the event, including:

- Promotion and registration through email, Web sites and social media and in-person events
- Held recruiting team calls; leads to Sales/Account Management
- Recruited and promoted industry, internal and client speakers
- Creation of presentation content and supporting materials
- Vendor, catering and venue and lunchtime tour approval
- Post-event surveys to attendees to gather feedback
- Coordinated continuing education credits for session content

Time	Activity
8:15 a.m.	Breakfast served
9:00 a.m.	Welcome Elie Farkas   CEO, Optum360
9:30 a.m.	Optum Physician Advisor Solutions: Revolutionizing Utilization Review for Greater Sustainability Elie Farkas   CEO, Optum360 This presentation will discuss the organizational capabilities necessary for a transformative revenue cycle, enhanced integration, a greater focus on the needs of the consumer, improved program interactions, and stronger clinical relationships.
10:20 a.m.	Barriers to Excellence: Six Imperatives for Revenue Cycle Leaders Elie Farkas   Managing Director, Research and Insights, Advisory Board This presentation will discuss the organizational capabilities necessary for a transformative revenue cycle, enhanced integration, a greater focus on the needs of the consumer, improved program interactions, and stronger clinical relationships.
10:30 a.m.	Physician Advisor Breakout Session: Foundations of an On-site Physician Advisor Program Paul Hagenberger, MD, JD   Vice President and Regional Medical Director, Optum360 This interactive discussion delves into the complexity, key requirements and expectations of the on-site role, and how it can be leveraged to drive value for the organization.
11:10 a.m.	Managing the Regulatory Landscape: Update on CMS & Contractor Activities Steven Greenman, JD, LLM   Vice President, Regulatory Affairs, Optum360 This informative session will delve into the latest regulations and guidelines set forth by CMS and its contractor organizations, and what it could mean for your facility.
11:30 a.m.	Lunch served
12:15 p.m.	Tour of Benaroya Hall Steven Greenman, JD, LLM   Vice President and Regional Medical Director, Optum360
1:00 p.m.	Clinical Documentation Strategy for Medical Necessity Paul Hagenberger, MD, JD   Vice President and Regional Medical Director, Optum360 Delve into the challenges of medical necessity reviews and provides best practices for managing clinical documentation.
1:30 p.m.	Financial Leader Research Breakout Session Elie Farkas   Managing Director, Research and Insights, Advisory Board This discussion, designed specifically for financial leaders, delves into the rise of consumerism and the strategic implications for the industry.
1:40 p.m.	Panel Discussion Elie Farkas   Managing Director, Research and Insights, Advisory Board Steven Greenman, JD, LLM   Vice President, Regulatory Affairs, Optum360 Paul Hagenberger, MD, JD   Vice President and Regional Medical Director, Optum360
3:15 p.m.	Wrap-up
3:30 p.m.	Meeting ends





# Customer Event Management: Promotion – Optum

Managing numerous customer events throughout the year, I also promoted each to ensure maximum target group registrations.

The collage features several promotional materials for the Optum Forum 2018/Forward, held from July 31-August 2, 2018, at the ARIA Resort & Casino in Las Vegas. The materials include:

- Optum Executive Health Resources Agenda:** A detailed agenda for Tuesday, July 31, 2018, and Wednesday, August 1, 2018. It highlights sessions such as "Modernizing the Revenue Cycle for our Collective Financial Success" and "Optum360 Market Advances - Establishing a Denial-Free Health Care System".
- Physician Advisor Academy:** A promotional flyer for a session on July 30, 2018, focusing on the role of physician advisors in compliance, revenue integrity, and patient care.
- EHR Learning Network Annual Meeting Agenda:** A schedule for the annual meeting, including sessions on "Helping Make Physician Advisor Programs Successful" and "Ask the Experts Panel".
- Executive Health Resources Educational Breakout Track:** A flyer for a three-day educational track covering topics like revenue cycle management and clinical documentation.
- Registration Information:** A flyer encouraging registration before May 31, 2018, to secure early-bird pricing and save \$300. It includes the registration fee of \$160 and a "CLICK TO REGISTER" button.
- Event Highlights:** A flyer titled "Here's the one meeting you can't miss at this year's Optum Forum" featuring the EHR Learning Network Annual Meeting and listing reasons to attend, such as networking and learning from industry experts.

## Pre-Event Communications

- Targeted emails with highlights (e.g., presentation topics, speakers, continuing education credits)

## Registration

- Registration site creation
- Analytics (registrant and attendee information)

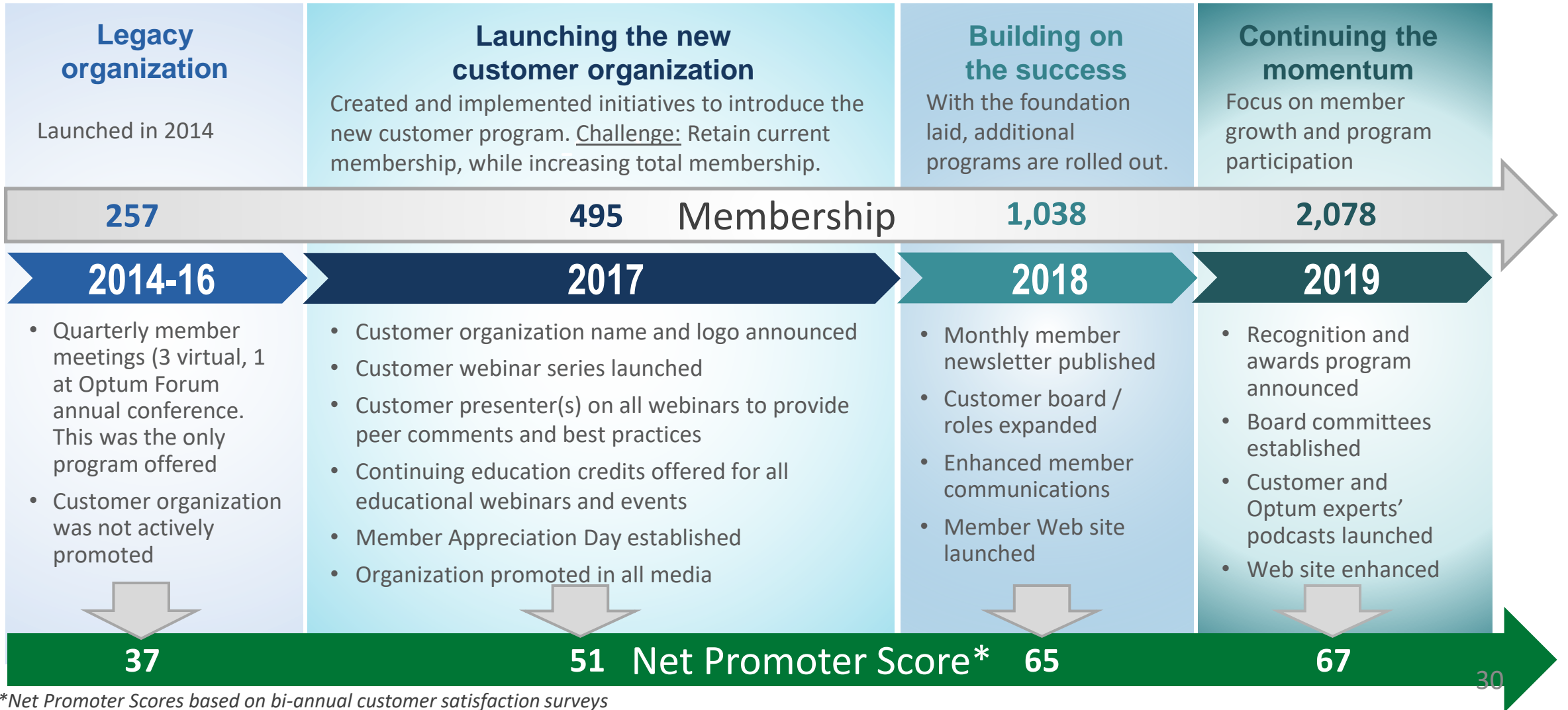
## Follow-up

- Continuing education credits information
- Attendee surveys
- Event results/feedback for leadership



# Customer Engagement Program – Optum (2017-2019)

I was tasked with rebuilding of the existing customer user group in which customers enjoy exclusive benefits with membership. This included educational opportunities, networking with Optum subject matter experts and other customers to promote customer engagement and loyalty, curb client retention and increase Net Promoter Scores (NPS) for customer satisfaction.



# Customer Engagement Campaign – Optum (2016-2019)

Customer campaign I created and led to promote Optum as *the* industry thought leader and provider of healthcare solutions. Mailings sent to the director of case management at each client hospital in celebration of National Case Management Week.



2016

- Printed (online version available) career guide for case managers, directors and revenue cycle staff with articles to help ensure compliance, improve processes and return on investment
- Link to online resources

2016 Net Promoter Score\*: **37**



2017

- 40-page desktop flip book containing helpful resources for case management teams
- Custom-themed t-shirt also delivered to client facility in the mailing
- Trackable links to online client-exclusive resources

2017 Net Promoter Score\*: **51**



2018

- Poster containing best practices, helpful tips and process enhancements for department display
- Custom-themed t-shirt also delivered to client facility in the mailing
- Trackable links to online client-exclusive resources

2018 Net Promoter Score\*: **65**

\*Net Promoter Scores based on bi-annual customer satisfaction surveys

# Compliance Awareness Campaign – Executive Health Resources/Optum (2016)

As the result of new government regulations on how hospitals determine patient care and status for Medicare reimbursement, I led the content creation and communications strategy on this campaign to create information, provide best practices and guidance to reassure customers of the importance of using the company’s clinical teams for review of their patient records to help ensure compliance and proper reimbursement and prevent claims denials.



## Mailing

- Dimensional mailer delivered to case management director, CEO and CFO of each client hospital
- Account Managers provided collateral for customer follow-up



## Media

- Corporate Web site promotes e-version and additional thought leadership/best practices content
- Proactive media push to highlight Optum expertise



## Communications

- Email to all customers with dimensional mailer download link
- FAQs to better understand and navigate new regulations
- Tweets/blog posts to provide analysis of new regulations



# Brochures / Flyers

Examples of marketing support materials I created and worked with the graphic design team to promote the organization, its products and other company services.

**Customer Feedback**  
 Provided Account Managers with an avenue to encourage client comments on our products/services and show how their suggestions help us to produce positive results for them.

**Supplemental Services Offered**  
 Educated customers on additional services the company offers that they may not be aware of and the value it can bring to their organizations.

**OPTUM360°**  
**Your voice is our action!**

Our customers are our top priority. And your feedback on our solutions and the quality of service we provide to you is essential in guiding us in future innovations and enhancing the client experience.

**Our commitment to you is simple: You talk. We listen. We take action.**

**MONITOR**—Measure performance, share success stories and continue to listen to customers

**LISTEN**—Gather feedback on what customers are telling us about their experiences

**ANALYZE**—Review feedback to identify the drivers of loyalty

**ACT**—Respond to and act on feedback to design improved experiences.

**INTERPRET**—Review feedback to identify the drivers of loyalty

**We listened ... we acted!**

The cornerstone of the Voice of the Client program is not only the actions we take based on your feedback, but our follow-up to let you know how we are acting on your feedback. Below are just a few of the improvements we have made, based on your responses:

Your Feedback	Our Action
"We want easier processes."	<ul style="list-style-type: none"> <li>Increased release trainings attendance</li> <li>Enhanced incident tracking on support portal</li> <li>Created an interactive user community</li> </ul>
"We want consistent high-quality performing products."	<ul style="list-style-type: none"> <li>User groups vote on proposed enhancements</li> <li>Developed UI for Enterprise CAC and CDI 3D</li> <li>Schedule releases during more optimal times</li> </ul>
"We need quicker turnaround times on issues."	<ul style="list-style-type: none"> <li>Tier 1 Support teams centralized</li> <li>28% reduction in client-reported defects through improved quality of releases</li> <li>Improved intake and triage mechanism for one-touch assignment</li> </ul>

**Commitment to excellence**

We take great pride in delivering quality customer service, based on our clients' needs and suggestions. Optum continues to be recognized in the industry for our ongoing commitment to our clients.

**Contact your Account Manager with any questions or additional information.**

**OPTUM360°** optum.com

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**OPTUM360°**  
**First Level Review Services**

First Level Review Services

**Our first level review service**

- AVAILABILITY** Our teams are available to our clients 7 days a week, 365 days a year.
- EXPERIENCE** Our teams are trained in applying InterQual® and Indico scoring criteria and undergo ongoing inter-rater reliability and quality assurance testing.
- EFFICIENCY** Our first- and second-level reviews pair seamlessly to enable timely and efficient recommendations for facility.
- DOCUMENTATION** We use the latest versions of InterQual and/or Indico, showing the criteria utilized and clinical information from the medical record to support the selection.
- SUPPORT** We can provide additional support for our clients who lack sufficient resources to manage their admission reviews.

**Getting it right**  
 Patient status, determine reviews by nurses who efficiently and correct increased denials and

**Building your m**  
 Optum360° can supply seasoned team of top first level screening, a preliminary review, a physician's second l

**First level and for consistent.**

Our first level reviews, when needed review process, allow

Our Medical Necessity review software and second level review foundation of utilizat

**Reporting and analysis**

Our first level review reports provide detailed lists of cases reviewed, including first level outcomes and second level recommendations, as appropriate. In addition, our reports segment inpatient and observation cases for easy viewing of case outcomes.

**Sample first-level review reports**

**Exclusive client educational resources**

Clients can access our comprehensive educational resources, including our physician advisor team, who are available at any time to discuss regulations and best practices and can visit your facility to conduct customized education sessions.

Clients can attend our exclusive industry education sessions and have access to our Compliance Library for an archive of news and events, CMS updates and other helpful materials to improve workflow processes.

**For more information**  
 Call: 1-866-213-4730  
 Email: optum360@optum.com  
 Visit: optum360.com

**OPTUM360°** optum360.com

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# Executive Communications



## 22 Years' Experience

- Employee, Customer, Partner Communications
- Strategic and Investor Communications
- Organization and Crisis Communications
- Management Toolkits
- Key Messaging, Talking Points & FAQs
- Speechwriting / Speaking Engagements
- Presentation Content
- Ghost-Written Articles
- Social Media and Blog Posts Strategies

# Employee Engagement



For more than 20 years, I have worked directly with company executives – in organizations of all sizes – to ensure that the lines of communication between leadership and their teams are strong, consistent and transparent.

My top priority is to establish the executive's voice as a leader who builds trust, increases morale and drives productivity among employees and clearly defines the organization's vision and goals. I achieve this through the creation and implementation of\*:

- Internal communications plans
- Company events
- Town Halls (content, speakers, Q&As)
- Culture and engagement programs
- Reporting organizational changes, milestones and wins
- Employee awards and recognitions
- Change management strategies
- Executive briefings and analysis of employee surveys

*\*not a comprehensive list*



# Industry Awareness

Building and maintaining a positive image of any organization starts with leadership. Our leaders not only become the representatives of the company and promoters of our brand, but our champions throughout the industry. I always strive to ensure they are well prepared with our key messages, talking points and the best way to communicate the company's vision.

It is critical that leadership stay in touch with the needs of our customers and partners and the challenges in the industry. I achieve this through\*:

- Branding
- Key Messaging
- Speaking Engagements
- Customer & Partner Communications
- Crisis Communications management
- Investor Relations interaction
- Talking Points and FAQs

*\*not a comprehensive list*





# Media Coverage

A strong relationship between an organization and the media is critical to health of the business. As the primary spokespeople for the company, leadership has a responsibility to not only present information in a consumable way, but to relay a sense of expertise and credibility.

As both a former member of the media and a representative to the media, I have a unique perspective on how information is best delivered with optimal results. I achieve these outcomes by\*:

- Targeting the audience and media channels to use
- Bylined/ghost-written articles (e.g., profiles, case studies, white papers) for leadership
- Proactive media pitching and earned placement
- Media training and interview preparation
- Addressing the issues and reiterating key messaging
- Strategic social media, blogs, podcasts
- Storytelling with broad appeal

*\*not a comprehensive list*



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