Program Report

Aetna Awards 2020

THE ELITE - LIVE!
Tuesday, June 21, 2021

BEST-IN-CLASS: EAST & MIDWEST
Wednesday, June 22, 2021

BEST-IN-CLASS: SOUTH & WEST
Thursday, June 23, 2021

NASHVILLE, TN

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Summary

our mission

to award our top performers (Agents and Agencies) for their work in 2020 with a series of virtual award shows.

our vision:

to see Aetna/CVS Health continue to be a leader in the awards space by creating moments our attendees will never forget.

our objectives:

Award and Entertain

dates:

June 21-23, 2021

format:

100% virtual with pre-recorded award shows based on region

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Executive Summary

business purpose

The goal of the Medicare Supplement Conference (Incentive Trip) is to recognize and reward agents and agency leaders for accomplishing a set of expectional production goals for the previous calendar year. It's also a time for business discussions, networking and relationship building. That's in a normal year... 2020/2021 wasn't so normal.

program description

The COVID-19 global pandemic caused us to pivot this program rather quickly from an incredible trip to San Francisco, CA to a suite of virtual award shows. We still wanted to say "Thank you" to our top agents and agency leaders even if we couldn't be together in person.

audience/attendee type

High performing, top-level agency executives and agents for both Medicare Supplement and Medicare Advantage.

Stakeholders

Events & Conferences Team:

Toby S. Gregory, CMP – Program Lead
Brent Clayton – Dir of Strategic Planning

Medicare Leadership Team:

Ty Wooldridge - Medicare Supplement
Armando Luna, Jr. - Medicare Advantage
Steve Patton - Medicare Supplment
Matt Feret – Exe Dir, Sales Strategy

The Agency:

Diana Hernandez – Strategic Marketing, Sr. Specialist

Meeting Management:

Kim Murawski – Meetings Manager

Virtual Production:

Sara Linton - Producer, Go West Creative Group
David Fischette - Exe. Direct, Go West Creative Group
Matt Reithmayr - Director, Go West Creative Group

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[EXTERNAL] 22a. Request approved for Medicare Supplement Conference Award Series (4 of 4) on 05/13/2021, Resources need to be assigned

Monday, February 22, 2021   11:16 AM

Subject	[EXTERNAL] 22a. Request approved for Medicare Supplement Conference Award Series (4 of 4) on 05/13/2021, Resources need to be assigned
Link to Outlook Item	Click here
From	Cvent Notifications
To	Sturgill Gregory, Matthew T
Sent	2/22/2021, 11:05:15 AM

CVS Health Manager,

A The request submitted by Toby Sturgill Gregory for Medicare Supplement Conference Award Series (4 of 4) on 05/13/2021 has been approved. You may now assign the appropriate resource(s) needed for this meeting by following the steps below.

To assign a Meeting Planner:
1) Locate the meeting request you need to work in from your list of Events
2) Navigate to the Event Roles tab
3) Click Assign Event Role from the Actions menu
4) Select the appropriate Event Role: Internal Meeting Planner OR External Meeting Planner
5) Select appropriate User
6) Click Save

Request Details	
Question/ Field	**Answer**
Requester Information	
Requester First Name	Toby
Requester Last Name	Sturgill Gregory
Requester Email Address	SturgillGregoryM@aetna.com

Requester Work Phone	
Department	Medicare
Business Unit	Aetna
Cost Center	
Budget	
Approving VP First Name	Ty
Approving VP Last Name	
Approving VP Email Address	_____ _ _____
Who is your Executive Leadership Team (ELT) Member?	Karen Lynch
Event Information	
Event Title	Medicare Supplement Conference Award Series (4 of 4)
Event Start Date	05/13/2021 9:00 AM
Event End Date	05/13/2021 7:00 PM
Purpose of Event	In-person cancelled, now series virtual series to recognize winners. Annual Incentive trip for Agents and Agencies. Use to connect with the Principles and Agent on a person level to build loyal and brand trust. This an Industry standard and vital to the keeping agents engaged and writing business. Business Session to take place Monday morning in Hollow Square for 50 people. Diamond awards is a part of this event budget. Program was approved 6/27/19 and has already been contracted at the Hamilton Hotel in DC.

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Meeting Type	Producer Summit/Incentive/Forum
Experience Type	Virtual
Audience Type	External (Includes both Internal to CVSH and External)
Please specify the External Attendees that will be attending your event	Broker/Consultant
Estimated Number of Attendees	75
Services Required	Full Service – registration and logistics required

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Senior Supplemental Convention/Washington, D.C. 2021

11/11/2020

ASSIGNMENT DESIGNATION	
Senior Director approval (name & date)	Brent Clayton, Director Strategic Planning/Meeting Management
Assignment Name:	DC21
Assignment Task:	Senior Supplemental Convention – referred to as DC
Business Unit (BU):	Medicare Supplement
Aetna Lead: Main Clients	Brent Clayton, Director Strategic Planning/Meeting Management, Toby Sturgill Gregory, Sr. Project Manager
Go to market date:	April 12-16, 2021, Resort: TBD

When is this to be used?	Pre-enrollment ☐	Post-enrollment ☐	Both X
What markets will this piece be used?	National X	State Specific ☐	List impacted States:
Budget (local currency):	Total budget:	Production budget:	Media budget:
1557- Is this a significant document that needs non-discrim taglines/translations	Yes☐	No☐	Unsure☐
Will any of these materials be sent or available to members electronically that require they be produced accessible	Yes - will be sent electronically or posted online externally for members/potential members ☐	No☐	
*Complete if this is an Aetna branded document- Will Joint Venture Versions need to be created	Yes☐	No☐ *If unsure please confirm with Tania Torres at TorresT3@aetna.com*	

OBJECTIVES & MARKET INTELLIGENCE	
Why is this initiative needed or happening? What are the project background and the relevant business, market, and competitive context?	Annual incentive trip for Senior Supplemental business. Reward agencies and brokers for meeting selling goals. Attendees need to qualify in 2020 to on this trip. Contest runs January 1 – December 31st. Approximately 400 guests attend the event and it is held in a different location every year.

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What is the business goal? What is Aetna's business objective that this communications effort is meant to help achieve?	*Example: Drive X% acquisition, Y% retention, gain Z% share, X revenue increase, $Y sales of a product, etc.* Reward agencies/agents for over and above performance. Strengthen relationship with these partners and drive new sales.
What is the communication objective? How can marketing communications help you achieve the business goal?	*Are you increasing awareness, changing perceptions, generating leads, inducing trial, introducing a new product/tool, etc.?* Aetna appreciates you. Thank you!
Target Audience Who are we trying to influence; what are their demographics, psychographics, and what business value do they present? What are their biggest pain points, drivers, or needs? If there is more than one audience, what is the priority?	Attendees (21 + ages/both men and women) come from all over the U.S. and they are allowed to bring a guest (Aetna pays for the entire trip). The audience is made up of all external sales people. 60% of the attendees return year over year. Some Agencies have been with Aetna 30 + years, big and small agencies are represented...single producer broker to large agencies with thousands of brokers. Attendees have to qualify yearly. They have to meet monetary goals that are established yearly. There are 3 different levels of qualifiers: MGA, RGA and Agent. Qualifiers that meet established sales production goals • MGA – Managing General Agency (top commission levels in the largest agencies. Most with 100+ producers) • RGA –Regional General Agency (organizations that have anywhere from 3 brokers up but not at your top commission levels) • Agent – single producer They get invited to competitor events so go to a lot of these types of events. Agents/Brokers determine where they want to go so they sell based on the location and reputation of the trips offered. In previous years Aetna has held their events internationally. Competitor events include: Humana, Blues, Signa (UNL Sales Convention going to Mexico 2018). Aetna has a reputation for having the best event in the industry.
What do we want our audience to DO as a result of our communications? What is the key behavioral outcome?	*Do you want prospects to try the product? Customers to renew with Aetna? Do you want them to think differently about something? For people to visit a website to learn more? Do you want people to call their Aetna representative?* Recognize Aetna as an industry leader, with a commitment to beneficiary interests and quality (e.g. our star ratings are all-important). Seize and be excited about the products we offer and continue to partner with Aetna as a leading health care company.

MESSAGE

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Brand Vision, Brand Promise, and Aetna Brand Campaign To help us maintain consistency and portray a unified brand, this section of the brief stays the same in every Aetna marketing brief. This section grounds us in the type of company we want to be, and how we want to be perceived by people.	Aetna is transforming from a health insurer into a health company. In 2017, Aetna established a new brand strategy and launched a new brand campaign to support this transformation. At Aetna, we believe that health is personal and unique, and defined by much more than just the absence of illness. We care about the "whole" person (body, mind and spirit) and believe that everyone deserves to feel the joy of achieving their best health, however they define it. So we dedicate every ounce of our energy to helping people reach their health goals, big and small, at every stage of life. All marketing should align with the new Brand Vision and Promise. *The campaign line is not mandatory for business unit communications, but must be included in all Aetna Brand Advertising.* **Brand Vision: The Joy of Realizing Healthy Ambitions** Better health comes through bigger ambitions — realizing what's possible each day and in every stage of life, finding the right approach, and then making it happen. At Aetna, your goals lead the way. We believe that whatever you decide to do for your health, you can do it with the right support. And it's our job to enable you to feel the joy of achieving your best health, in your own way. **Brand Promise:** Turning health ambitions, big and small, into achievements **Campaign:** You don't join us, we join you Members have always joined a health insurance company to receive coverage. Now, we flip this idea on its head, committing to join members on their journeys to their health goals, whatever those may be.
Key message What is the main message we need to communicate in this assignment?	*This should be one sentence phrased as a customer benefit to the target audience.* Thank you for your business.
Why should the audience believe this message? **Support Points & Reasons to Believe.** What are specific products or services that support the key message? What unique or relevant product characteristics, facts about users or usage, or competitive benefits would persuade people of our message? Are there any legally approved facts or claims that can be made?	Get them excited about Aetna and new initiatives the company is taking to help enhance and grow their business year over year. Aetna's Medicare strategy is focused on innovation and the consumer experience. • Provide competitive price points • Strong brand presence • Varying array of product offerings
Brand Voice The Brand Voice also stays constant across all Aetna marketing efforts, to ensure Aetna	**Empathetic:** We start everything we do with a deep understanding of people. We care about the "whole" person and support them in each of their individual health journeys. Empathetic communication is: Sincere *but not* "fluffy", Compassionate *but not* inauthentic, Perceptive *but not* assumptive

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sounds and acts the same across touchpoints.	**Dedicated:** We are member-first, seeking to do everything we can to help members along their health journeys. We offer active, authentic support to members in every interaction.
	Dedicated communication is: Attentive *but not* prying, Supportive *but not* intrusive, Open *but not* overwhelming
	Progressive: We are resourceful, inventive, and committed to making tomorrow better than today. We push ourselves to constantly find new ways to help each member to achieve his or her health goals.
	Progressive communication is: Hopeful and positive *but not* unrealistic, Forward-thinking *but not* vague, Energetic *but not* unfocused, Ambitious *but not* overbearing
	Clear: We avoid complexity and jargon wherever possible. We speak in simple, straightforward language that is easy to understand.
	Clear communication is: Plain *but not* boring, Direct *but not* blunt Simple *but not* simplistic, Conversational *but not* unprofessional

DELIVERABLES & LOGISTICS

| **Assignment Scope / Deliverables**
What is the agency being asked to deliver? Is this a larger campaign or a tactical project?

Are there other related communications that must align to this (or vice versa)? | *Deliverable Examples: Print Ad, Sales kit, digital advertising, website, wireframes, social media program, marketing collateral, e-mail campaign, event displays, presentation, etc.*

• Theme/Concept – "Poolside in Palm Springs" was Palm Springs 2019, " and "The Golden Gateway" was San Francisco 2020 need new concept for DC 2021.
• Program graphic– (will need various versions…one to face brokers with Sales Contest tag line, one that is used onsite at the event, and embrodiary graphic version, program graphic for web tracker)
• Lapel Pin with program graphic
• Email invite (deploys February, 2021)
• Trip Welcome Package
   o Printed invite with pre-trip chopsticks gift (did a travel book for Palm Springs)
   o Creative packaging to catch the Attendees attention when they receive the welcome packet of items for the trip.
   o Graphic for Luggage Tags – Luggage tags for the trip
• 1 pg. 2020 Sales Flyer (pdf and printed)– already exisits, will need to redesign one that was already sent out in December to include 2021 theme and graphic treatment
• Video: promotes sales convention. Promoting contest, location based (complete by July – could be handled by local creative agency)
• Email with video link – teasing contest and video link (depoly in July)
• Blank OFT template
• Contest announcements, teasers, contest reminders
• Email footer – Aetna staff and Sales Service team puts this in the signatures of their email to promote the contest ("Ask me how you can go to Washington, D.C.")
• Digital Photo Book (agenda, welcome letter from Management, pictures of all guest attending) –This will be included in mobile app and will not be printed
• Cvent – Online registration. Write copy for registration page and work with Ashley
• Mobile app (Crowd Compass)– refer to deliverables and specs
• Swag ideas –DMC always gives ideas to Brent also. |

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- Gift tags/card for amentities that are dropped at night (a room drop a night) – we didn't do this for Palm Springs and might not do it for SF20 because they're hard to deloy. Keep it on your radar, but don't spend time on it until you hear from Toby.
- Signage – banners at registration (not a lot of signage) Brent to determine if DMC will handle this?
- Template with program graphic header –(used for front of bus and for excursions etc.)
- Printed Menus 4/5 (design plays off theme of venue or theme of colors or theme of event)
- "Reserved" – signs for every meal just for Aetna people…they split up Aetna people for networking since we are the host (DMC may do but we can talk through)
- Business Meeting PowerPoint template
- Business Meeting Table Tents
- Pre-Trip Notecard and small gift:– will send a note with a small gift to those who are close to qualify.
- Gala Videos – Brent to determine which production company will be used for DC21.
- Quality Rewards Sheets
- Sales Sheets
- Award Certificates (Diamond Partners only)
- Gala theme/mood board
- Email: Blank OFT
- Email: Highlight
- Email: Post Event Survey
- Emai: Save the Date
- Flyer: Contest Qualifications
- Flyer: FAQs to Broker Agencies
- Schedule Mirror Cling (DMC did this for Palm Springs – might just need branding/theme elements for DMC to design and produce)
- Nametags
- Nametags Template

*Please refer to the Collateral Needs per Program document for all program collateral.

Executional Mandatories What criteria must this work meet? Are there any legal requirements?	
Markets Where will this work be running? Are there any heavy-up markets? Are there any markets to avoid, and if so, why?	
Organizational Dependencies What parts of the organization need to be aligned to make this	

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successful, and what support do you need to do so?	
Additional Considerations How will the work be distributed? Is there a media plan? Should this tie to any existing work? Is there any existing content or creative imagery to leverage? Is this piece posted online where accessibility needs to be considered?	• 2021 event is in Washington, D.C. • Collateral and program graphics for 2020 event are available in Box for reference • Previous years event was held internationally in Berlin, Iceland, Barcelona, Costa Rica, Budapest (now has to be in US) • Website for SSI operates through Robin Raff – we'll need to work with her to upload creative • They have a separate email address for the Palm Springs event that Brent's team manages • Toby will create the project plan for this event –(timing beginning of May 2020)

METRICS	
Success Metrics How will you determine if this effort is a success or a failure? What are the Key Performance Indicators, and what are the secondary metrics?	*Example: Sales? Specific acquisition or usage goals? Leads generated? Change in attitude or perception? Increase in brand awareness? Response to call to action? Click-thrus? Traffic? Registrations? Request for materials? Time spent on website? Other?*
Ongoing Optimization What elements will be testable to determine how to improve over time?	

TIMING	
Timing What are key dates or deadlines that the agency should be aware of?	See DC21 Project Plan for timing and due dates.

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For all digital projects, please fill out the following questions.

PREPARATION	
Privacy, Compliance, and Legal Always consult with your privacy, compliance, and legal lead. Please list any comments or concerns.	
Vendors Is an external vendor involved? If so, who is the vendor? Have they been approved by procurement?	
Digital Governance All new digital initiatives and major enhancements to existing digital assets should come through Digital Governance. Please have the **Business Owner** complete the digital intake request to gain insight and approval from our governance SMEs to move forward with your digital initiative. Please list any comments or concerns. NOTE: approval can up to one week, please plan accordingly	

STRATEGIC	
PoC or live Is this a proof of concept, or will this be pushed live?	
Live details If this is being pushed live, what is the go live date? Are there any dependencies that will affect the go-live date? Where will this piece be	

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living? Will there be an offline version? If so what format will the offline version need to be in?	
Ownership Who will the responsible for building it? Who will be responsible for maintaining the asset(s) after release?	

TECHNICAL	
Email If an email, what format does it need to be in? HTML, OFT, or both? NOTE: HTML is responsive; OFT is not	
Banner ads If banner ads, what are the paid media specs for all pieces, including banner sizes? Will the banners be animated, or static?	
Sites & landing pages If a website or a landing page, where do you plan to host, or where is it hosted currently? Does the initiative require a new or reactivation of a URL? If so, what is the URL? NOTE: can be copied from digital intake request form	
Browsers Are there any known browser support requirements? Standard requirements: *Microsoft Internet Explorer/Edge* • *Edge 15* • *Edge 14*	

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• Explorer 11 *Google Chrome* *• Google Chrome - Most recent 3 versions* *• Chrome Mobile – Most recent 3 versions* *Safari* *• Most Recent 3 versions* *Firefox* *• Most Recent Version*	
Restrictions Are there any known technical restrictions on the end users side (i.e. outdated software versions, etc.)?	
Note about responsive Assume that anything live will need to be built to be responsive. More on responsive design here.	

Theme/Concept

Since we weren't able to meet in person in Washington, D.C., we still wanted a way to congratulate our top performers and recognize them in front of their peers.

We chose to do that through three separate and distinct award shows: **THE ELITES:** honoring 2020's President's Cabinet and 2021's Diamond Partners; **BEST-IN-CLASS: EAST AND MIDWEST**; and **BEST-IN-CLASS: SOUTH AND WEST**.

Since 2020 (the production year we're celebrating for Med Supp) kicked us off into a new decade - the 20-TWENTIES - we went with a theme that nodded to the century-old roar of the 1920s.

AETNA AWARDS

THE ELITE
AETNA VIRTUAL AWARDS

BEST IN CLASS
AETNA VIRTUAL AWARDS
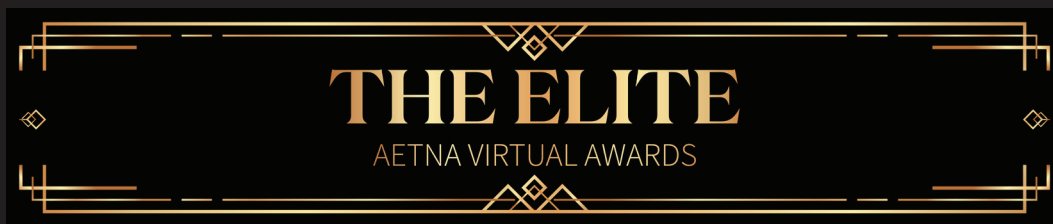
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Set design

2-4 hosts presented from here across three separate award shows broadcast from Go West Creative in Nashville, TN.

Awards Suite

This was year one in our five-year strategy to bring a cohesive look to our annual awards. These are from **Trophyology**.

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Run of Show: The Elites-LIVE!

Aetna Awards: The Elite LIVE!
Show Flow • Wednesday, June 23, 2021 • 7pm CST

TRT	Action	Presenter	TITLE CARD COPY	NOTES
	Countdown video			
	Entertainment - Band Opener			
5:00	*Opening Remarks*	Armando, Ty, Matt and Steve		
	Awards Chunk 1: ELITE AGENTS		AETNA MEDICARE AWARDS: THE ELITE AGENTS	Sara – let's keep this CHUNK called ELITE, but keep the award titles as-is and NOT change them to "Elite Agent: Complementary Products, etc."
				Keep award title to say, "Top Agent" for the individual award titles.
	Top Agent: Complementary Products Combined	Steve		
	Top Agent: Senior Supplemental	Ty		
	Intro - awards chunk 2			
	Awards Chunk 2: ELITE AGENCIES (single awards)		AETNA MEDICARE AWARDS: THE ELITE AGENCIES	Chunk title card "ELITE AGENCIES"
	Top RGA Senior Supplemental Agency	Steve		Subgroup of RGAs should stay "Top RGA" etc.
	Extend insurance Services, LLC.	Matt		
	Top MGA Senior Supplemental Agency	Steve		
	Jack Schroeder and Associates, Inc.	Matt		
	Top IMO Senior Supplemental Agency	Steve		
	Entertainment - Band			
	Intro - awards chunk 3			
	Awards Chunk 3: ELITE AGENCIES (mulitple awards)		AETNA MEDICARE AWARDS: THE ELITE AGENCIES	Chunk title card "ELITE AGENCIES"
	EHealth Insurance Services, Inc.	Armando		only ALL Diamond
	Integrity Marketing Group	Matt		
	Senior Security Benefits, Inc.	Steve		
	Senior Market Sales, Inc	Matt		
	Spring Insurance Solutions, LLC.	Ty		
	Yourmedicare Agencies	Matt		
	Intro - award chunk 4			
	Awards Chunk 4: TOP MEDICARE PARTNER		AETNA MEDICARE AWARDS: THE TOP MEDICARE PARTNER	
	Integrity Marketing Group	Armando, Ty, Matt & Steve		Need Integrity stats for each guy to say
	Closing Remarks			
	Entertainment - Band Closes			

Run of Show: Best-in-Class EMW

Aetna Awards: The Best in Class 1 (East + Midwest)
Show Flow • Thursday, June 24, 2021 • 6pm CST

Time	TRT	Action	Presenter	Title Card Copy	Needs
		Countdown video			
		Entertainment - Band Opener			
		Opening Remarks	Ty and Steve		wide shot to show set
		Awards Chunk 1: BEST IN CLASS AGENTS (1-33)		AETNA MEDICARE AWARDS: THE BEST IN CLASS AGENTS	fullscreen with VO for names
		Intro - awards chunk 2			
		Awards Chunk 2: BEST IN CLASS RGAs (6)		AETNA MEDICARE AWARDS: THE BEST IN CLASS RGAs	Ty or Steve announce with set shot
		Entertainment - Band			
		Awards Chunk 3: BEST IN CLASS AGENTS (34-66)		AETNA MEDICARE AWARDS: THE BEST IN CLASS AGENTS	fullscreen with VO for names
		Intro - awards chunk 4			
		Awards Chunk 4: BEST IN CLASS MGAs (6)		AETNA MEDICARE AWARDS: THE BEST IN CLASS MGAs	Ty or Steve announce with set shot
		Intro - awards chunk 5			
		Awards Chunk 5: BEST IN CLASS AGENTS (67-99)		AETNA MEDICARE AWARDS: THE BEST IN CLASS AGENTS	fullscreen with VO for names
		Entertainment - Band			
		Intro - award chunk 6			
		Awards Chunk 6: BEST IN CLASS IMOs (2)		AETNA MEDICARE AWARDS: THE BEST IN CLASS IMOs	Ty or Steve announce with set shot
		Intro - award chunk 7			
		Awards Chunk 7: BEST IN CLASS AGENTS (99-132)		AETNA MEDICARE AWARDS: THE BEST IN CLASS AGENTS	fullscreen with VO for names
		Intro - award chunk 8			
		Awards Chunk 8: BEST IN CLASS NMOs (16)		AETNA MEDICARE AWARDS: THE BEST IN CLASS NMOs	Ty or Steve announce with set shot
		Closing Remarks	Ty and Steve		Thank you and their vision for the rest of the year.
		Entertainment - Band Closes			

Run of Show: Best-in-Class S+W

Aetna Awards: The Best in Class 2 (South + West)
Show Flow • Thursday, June 24, 2021 • 8pm CST

Time	TRT	Action	Presenter	Copy	Needs
		Countdown video			
		Entertainment - Band Opener			
		Opening Remarks	Ty and Steve		
		Awards Chunk 1 : BEST IN CLASS AGENTS (1-30)		AETNA MEDICARE AWARDS: THE BEST IN CLASS AGENTS	
		Intro – awards chunk 2			
		Awards Chunk 2 : BEST IN CLASS RGAs (8)		AETNA MEDICARE AWARDS: THE BEST IN CLASS RGAs	
		Entertainment - Band			
		Awards Chunk 3 : BEST IN CLASS AGENTS (31-60)		AETNA MEDICARE AWARDS: THE BEST IN CLASS AGENTS	
		Intro – awards chunk 4			
		Awards Chunk 4 : BEST IN CLASS MGAs (6)		AETNA MEDICARE AWARDS: THE BEST IN CLASS MGAs	
		Intro – awards chunk 5			
		Awards Chunk 5 : BEST IN CLASS AGENTS (61-90)		AETNA MEDICARE AWARDS: THE BEST IN CLASS AGENTS	
		Entertainment - Band			
		Intro – award chunk 6			
		Awards Chunk 6 : BEST IN CLASS IMOs (2)		AETNA MEDICARE AWARDS: THE BEST IN CLASS IMOs	
		Intro – award chunk 7			
		Awards Chunk 7 : BEST IN CLASS AGENTS (91-119)		AETNA MEDICARE AWARDS: THE BEST IN CLASS AGENTS	
		Intro – award chunk 8			
		Awards Chunk 8 : BEST IN CLASS NMOs (7)		AETNA MEDICARE AWARDS: THE BEST IN CLASS NMOs	
		Closing Remarks			
		Entertainment - Band Closes			

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Awards + NDP + GC filming schedule

AWARDS21, NDP21 and Gold Circle Rehearsal + Film Schedule				
Date	**Program**	**What's Happening**	**Who's There**	**What's Needed**
Tues. June 15				
8-10am CST	NDP21	The FIRST VU virtual table read	Chris, Armando, Ty & Terri	
Thurs. June 17				
11am-12pm CST	Awards21	Best in Class 1 & 2 virtual table read	Ty and Steve (Toby for Steve)	
Mon. June 21	Matt and Terri Out			
Call time: 8:15am	Awards21	Arrive to Go West Studios	Ty, Steve & Events Team	528 Rundle Ave. Nashville, TN
9am	Awards21	Ty's arrival from Carvana	Ty	
9-10am	Awards21	Papertech/Read Through BIC 1 & 2	Ty & Steve	
10-11:30am	Awards21	Rehearse: Best in Class #1	Ty & Steve	
11:30-11:45am	Awards21	Wardrobe, hair & makeup	Ty & Steve	Black Tie (Tux)
11:45am-1pm	**Awards21**	**Film: Best in Class #1**	Ty & Steve	
1-1:45pm		Lunch		
1:45-2:30pm	Awards21	Rehearse: Best in Class #2		
2:45-4pm	**Awards21**	**Film: Best in Class #2**	Ty & Steve	Black Tie (Tux)
PM	Awards21	Arrive into Nashville	Armando & Greg	
Tues. June 22	Matt and Terri Out			
All Day	Awards21	Edit Best in Class #1	GWC Crew	
Call time: 10am	Gold Circle	Arrive to Go West Studios	Armando, Steve, Greg, MJ & Events Team	528 Rundle Ave. Nashville, TN
10:30-11:30am	Gold Circle	Papertech/Read Through for Gold Circle	Armando, Steve, Greg & MJ	
11:30am-12pm	Gold Circle	Teleprompter updates	GWC Crew	
12-1pm		Lunch		
1pm	Gold Circle	Tech Check/Record Chris	Chris (remote)	
1-4pm	Gold Circle	Rehearse: Gold Circle	Armando, Steve, Greg & MJ	
4-4:45pm	Gold Circle	Wardrobe, hair & makeup	Armando, Steve, Greg & MJ	Black Tie (Tux)
4:50pm	Gold Circle	In-studio, presenters in place	Armando, Steve, Greg & MJ	
5-6pm	**Gold Circle**	**LIVE: Gold Circle Awards**	**Armando, Steve, Greg & MJ**	
PM		Departures from Nashville	Greg	
Weds. June 23		Arrive into Nashville	Matt	
All Day	Awards21	Edit Best in Class #2	GWC Crew	
Call time: 8:15am	NDP21	The FIRST VU	Armando & Ty (Chris & Terri are remote)	
9-10:30am	NDP21	Rehearse: The FIRST VU	Armando & Ty (Chris & Terri are remote)	Business Casual
10:30-10:45am	NDP21	Hair/Makeup	Armando & Ty	
10:45am-1pm	**NDP21**	**Film: The FIRST VU**	Armando & Ty (Chris & Terri are remote)	
Call time: 12pm	Awards21	Arrive to Go West Studios	Steve & Matt	
1-1:30pm		Lunch		
1:30-3pm	Awards21	Cue-to-Cue	GWC Crew	flutes for champange toast
1:30-3pm	Awards21	Script Run Through	Armando, Ty, Steve & Matt	
3-4:30pm	Awards21	Rehearse: The Elite	Armando, Ty, Steve & Matt	
5:45-6:15pm		Dinner		
6:15-6:45pm	Awards21	Wardrobe, hair & makeup	Armando, Ty, Steve & Matt	Tuxes
6:50pm	Awards21	In-studio, presenters in place	Armando, Ty, Steve & Matt	
7-8pm	**Awards21**	**LIVE: Aetna Awards: The Elite**	**Armando, Ty, Steve & Matt**	Black Tie (Tux)
		Late departure from Nashville	Armando	
Thurs. June 24	Armando and Chris Out			
Call time: 8:30am	NDP21	Arrive to Go West Studios	Matt & Brent	Same suit he'll be in for the show
9am-5pm	NDP21	Shoot opening video, various locations	Matt & Brent	
6PM	**Awards21**	**AIR: Aetna Awards: The Best in Class 1**	**(East & Midwest, pre-recorded)**	Pushed through the Aetna Platform
8PM	**Awards21**	**AIR: Aetna Awards: The Best in Class 2**	**(South & West, pre-recorded)**	Pushed through the Aetna Platform
Fri. June 25				
AM		Departure from Nashville	Matt	

Aetna Awards 2020

Program Report

Project Plan Smartsheet/Awards 20

	Column13	Task Name	Start	Due	Finish	Duration	Predecessors	Assigned To	Status
1	☆	− Initiation Phase	09/16/20	01/01/21		78d		Toby S. Gregory, CMP	Complete
2	☆	− Stakeholders							Complete
3	☆	Est/ID Stakeholders						Toby S. Gregory, CMP	Complete
4	☆	Stakeholder Event Definition						Toby S. Gregory, CMP	Complete
5	☆	Set Mission/Vision/Objectives						Brent Clayton	Complete
6	☆	− Establish Budget	09/16/20	01/01/21	12/18/20	78d		Brent Clayton	Complete
7	☆	Create budget in Smartsheeet	09/16/20	01/01/21	01/01/21	78d		Toby S. Gregory, CMP	Complete
8	☆	Review and revise with Manager	09/16/20	01/01/21	01/01/21	78d		Toby S. Gregory, CMP	Complete
9	☆	− Approval of Event	12/21/20	12/23/20	12/23/20	3d		Brent Clayton	Complete
10	☆	Email to Sr. Management	12/21/20	12/21/20	12/21/20	1d		Brent Clayton	Complete
11	☆	Approval from Sr. Management	12/23/20	12/23/20	12/23/20	1d		Brent Clayton	Complete
12	☆	Approval from MM to use GWC						Brent Clayton	Complete
13	☆	Create Meeting Management Request	12/25/20	12/25/20	12/25/20	1d		Toby S. Gregory, CMP	Complete
14	☆	− Executive Engagement (if applicable)							
15	☆	Stakeholder Request for engagement							
16	☆	Complete Request Form							
17	☆	Email to Stakeholder with forms to send to Chris C.							
18	☆	Approval from Chris C.							
19	☆	Submit Request Form							
20	☆	Receive Approval / Regret							
21	☆	Activate production tracking data							
22									
23	☆	− Planning Phase	03/15/21	03/17/21		3d			Not Started
24	☆	− Qualification Requirements							Not Started
25	☆	Establish requirements							
26	☆	Requirement Appovals							
27	☆	Create Project Plan						Toby S. Gregory, CMP	Not Started
28	☆	Establish Event Team	03/15/21	03/15/21	03/15/21	1d		Toby S. Gregory, CMP	Complete
29	☆	− Meeting Schedules	03/16/21	03/16/21	03/16/21	1d		Toby S. Gregory, CMP	Complete
30	☆	Schedule Management Team Meetings	03/16/21	03/16/21	03/16/21	1d		Toby S. Gregory, CMP	Complete
31	☆	Schedule Project Team Meetings	03/16/21	03/16/21	03/16/21	1d		Toby S. Gregory, CMP	Complete
32	☆	Calendar Holds for Program Dates	03/17/21	03/17/21	03/17/21	1d		Toby S. Gregory, CMP	Complete
33	☆	Exe Assistant Meetings Scheduled						Toby S. Gregory, CMP	Not Started
34									
35	☆	− Implementation Phase	02/03/21	04/21/21		56d		Toby S. Gregory, CMP	Not Started
36	☆	− BRANDING/THEME	03/17/21	04/09/21	04/07/21	18d			Complete
37	☆	Mood Boards to Toby	03/17/21	03/26/21	03/26/21	8d		Sara Linton	Complete
38	☆	Feedback from Toby to GWC	03/26/21	03/31/21	03/26/21	4d		Toby S. Gregory, CMP	Complete
39	☆	Final Direction Set	03/31/21	04/09/21	04/07/21	8d		Sara Linton	Complete
40	☆	− ELITE PARTNERS LIST	02/03/21	04/02/21	03/26/21	43d		Toby S. Gregory, CMP	Complete
41	☆	− Diamond Partners	02/03/21	03/25/21	03/10/21	37d		Clint Goodwin	Complete
42	☆	Get list from Clint	02/03/21	02/25/21	02/25/21	17d		Clint Goodwin	Complete
43	☆	Send list to GWC	03/08/21	03/10/21	03/10/21	3d		Toby S. Gregory, CMP	Complete
44	☆	Company Names & Logos (needed for NDP)	03/18/21	03/25/21	03/25/21	6d		Toby S. Gregory, CMP	Complete
45	⭐	− President's Cabinet	03/01/21	04/02/21	03/11/21	25d		Toby S. Gregory, CMP	Complete
46	☆	Pull data to get qualifiers	03/01/21	03/11/21	03/11/21	9d		Toby S. Gregory, CMP	Complete
47	⭐	Finalize PC list based on approvals	03/31/21	04/15/21		3d		Toby S. Gregory, CMP	Complete
48	☆	− NMO Partners	03/01/21	03/11/21	03/11/21	9d		Toby S. Gregory, CMP	Complete
49	☆	Pull data to get qualifiers	03/01/21	03/11/21	03/11/21	9d		Toby S. Gregory, CMP	Complete
50	☆	Full list of Elite Partners	03/01/21	04/02/21	04/02/21	25d		Toby S. Gregory, CMP	Complete
51	☆	− BEST-IN-CLASS PARTNERS LIST	03/01/21	04/02/21	04/02/21	25d		Toby S. Gregory, CMP	Complete
52	☆	Pull data to get qualifiers	03/01/21	03/31/21	03/31/21	23d		Toby S. Gregory, CMP	Complete
53	☆	To Leah for input (exclude Call Centers, LOAs, etc.)	03/01/21	03/23/21	03/23/21	17d		Toby S. Gregory, CMP	Complete
54	☆	To Steve for Approval	03/24/21	03/31/21	03/31/21	6d		Toby S. Gregory, CMP	Complete
55	☆	Steve's approval needed by:	03/31/21	04/02/21	04/01/21	3d		Toby S. Gregory, CMP	Complete
56	☆	Full list of Best-in-Class Partners	03/26/21	04/02/21	04/02/21	6d		Toby S. Gregory, CMP	Complete
57	⭐	List with Contact info for Registration Email	04/02/21	04/30/21	04/30/21	6d		Toby S. Gregory, CMP	Complete
58	☆	− AGENDA	03/17/21	05/10/21	05/10/21	18d			Complete
59	☆	Elite Partner Show	03/17/21	05/10/21	05/10/21	18d		Toby S. Gregory, CMP	Complete
60	☆	Best-in-Class Show	03/17/21	05/10/21	05/10/21	18d		Toby S. Gregory, CMP	Complete

#	Task					Assigned	Status
61	CVENT/WEBSITE GRAPHICS	04/02/21	04/09/21	04/07/21	6d	Toby S. Gregory, CMP	Complete
62	Specs from GWC to Kim	04/02/21	04/02/21	04/02/21	1d	Kim Murawski	Complete
63	Concepts, First Round	04/02/21	04/07/21	04/05/21	4d	Sara Linton	Complete
64	Final Files to Toby	04/02/21	04/09/21	04/07/21	6d	Sara Linton	Complete
65	CVENT Graphics to Kim	04/02/21	04/09/21	04/07/21	6d	Toby S. Gregory, CMP	Complete
66	WEBSITE	04/02/21	05/11/21		6d	Kim Murawski	Complete
67	Sitemap	04/02/21	04/02/21		1d	Toby S. Gregory, CMP	Complete
68	Welcome Copy	04/02/21	04/07/21	04/05/21	4d	Toby S. Gregory, CMP	Complete
69	CVENT Graphics	04/02/21	04/09/21	04/07/21	6d	Sara Linton	Complete
70	Final Agenda	04/02/21	05/10/21	05/10/21	6d	Toby S. Gregory, CMP	Complete
71	Livestream Link					Sara Linton	Complete
72	Website goes Live	05/11/21	05/11/21			Kim Murawski	Complete
73	REGISTRATION EMAIL	04/02/21	05/12/21	05/12/21	9d	Kim Murawski	Complete
74	Data points we need to capture to Kim	04/02/21	04/09/21	04/07/21	4d	Toby S. Gregory, CMP	Complete
75	Registration Paths Defined	04/02/21	04/02/21	04/02/21	1d	Toby S. Gregory, CMP	Complete
76	First Round to Toby	04/05/21	05/07/21	05/06/21		Kim Murawski	Complete
77	Final Design	05/06/21	05/07/21	05/07/21		Kim Murawski	Complete
78	Final list to Ty, Armando, Matt and Steve	05/06/21	05/06/21	05/06/21		Toby S. Gregory, CMP	Complete
79	Updated invite list to Kim	04/02/21	05/10/21	05/07/21	6d	Toby S. Gregory, CMP	Complete
80	Deploy Registration Email	05/12/21	05/12/21	05/12/21	1d	Kim Murawski	Complete
81	REGISTRATION	05/12/21	05/19/21	05/19/21	6d	Kim Murawski	Complete
82	Registration Opens*	05/12/21	05/12/21	05/12/21	1d	Kim Murawski	Complete
83	Registration Closes*	05/19/21	05/19/21	05/19/21	1d	Kim Murawski	Complete
84	THANK YOU + POST EVENT SURVEY					Toby S. Gregory, CMP	Not Started
85	Concepts, First Round					Diana Hernandez	Not Started
86	Scrub Survey Questions from PS19 ?					Toby S. Gregory, CMP	Not Started
87	Final list of survey questions to The Agency					Toby S. Gregory, CMP	Not Started
88	Final files to Toby					Diana Hernandez	Not Started
89	PRESENTATION GRAPHICS	03/18/21			17d	Toby S. Gregory, CMP	Not Started
90	Elite Partners	03/18/21				Diana Hernandez	Not Started
91	Company logos for PC and DP	03/18/21				Toby S. Gregory, CMP	In Progress
92	Best-in-Class					Diana Hernandez	Not Started
93	First Round					Diana Hernandez	Not Started
94	Final Files to Toby					Diana Hernandez	Not Started
95	Files to GWC					Toby S. Gregory, CMP	Not Started
96	Attendee Headshots	04/09/21	04/09/21		1d		
97	VIRTUAL BROADCAST PREP						Not Started
98	Secure Production Partner					Brent Clayton	Not Started
99	Live Stream URL					GWC Contact	Not Started
100	Final Agenda					Toby S. Gregory, CMP	Not Started
101	Run of Show					Toby S. Gregory, CMP	Not Started
102	SCRIPTS						
103	Outlines to GWC for copywriting		05/21/21	05/21/21		Toby S. Gregory, CMP	Complete
104	Rough Draft from GWC		05/28/21	05/28/21		Sara Linton	Complete
105	Edits due back to GWC		06/04/21			Toby S. Gregory, CMP	Complete
106	Final draft due from GWC		06/15/21			Sara Linton	Complete
107	TABLE READS						Complete
108	Schedule Best in Class		06/16/21			Toby S. Gregory, CMP	Complete
109	Schedule The Elite		06/17/21			Toby S. Gregory, CMP	Complete
110	AWARD TROPHIES						Complete
111	Elite Partners						Complete
112	PAYOUTS					Brent Clayton	Complete
113	Elite Partners					Brent Clayton	Complete
114	Diamond Partners					Brent Clayton	Complete
115	Payout Amount:					Brent Clayton	Complete
116	Send payout info to tax HQ					Brent Clayton	Complete
117	President's Cabinet					Brent Clayton	Complete
118	Payout Amount:					Brent Clayton	Complete
119	Send payout info to tax HQ					Brent Clayton	Complete
120	Best-in-Class					Brent Clayton	Complete
121	Payout Amount:					Brent Clayton	Complete

122	☆	Send payout info to tax HQ					Brent Clayton	Complete
123	☆							Complete
124	☆	⊟ KBYG EMAIL					Kim Murawski	Complete
125	☆	LIve Stream info to Kim					Toby S. Gregory, CMP	Complete
126	☆	First Round to Toby					Kim Murawski	Complete
127	☆	Updated invite list to Kim					Toby S. Gregory, CMP	Complete
128	☆	Deploy KBYG Email					Kim Murawski	Complete
129								
130	☆	⊞ Cancelled Projects						
171								
172								
173	☆	Event Phase					Toby S. Gregory, CMP	Not Started
174	☆	Monday (5/24) - Elite Partners Awards Show	05/24/21	05/24/21		1d		
175	☆	Tuesday (5/25) - Best-in-Class Awards Show 1	05/25/21	05/25/21		1d		
176	☆	Wednesday (5/26) - Best-in-Class Awards Show 2	05/26/21	05/26/21		1d		
177	☆	Thursday (5/27) - Best-in-Class Awards Show 3	05/27/21	05/27/21		1d		
178								
179	☆	Closing Phase	07/26/21	08/13/21		15d	Toby S. Gregory, CMP	Not Started
180	☆	⊞ Thank You + Post Event Survey					Toby S. Gregory, CMP	Not Started
187	☆	⊞ Hot Wash / Debrief Meeting					Toby S. Gregory, CMP	Not Started
190	☆	⊞ Event Summary Meeting					Toby S. Gregory, CMP	Not Started
195	☆	Digital Program Notebook Archived					Toby S. Gregory, CMP	Not Started
196								
197								
198								
199								

Attendance

2021 Diamond Partners	City	State
EHealthInsurance Services, Inc.	Gold River	CA
Extend Insurance Services, LLC	South Jordan	UT
Integrity Marketing Group	Dallas	TX
Jack Schroeder and Associates, Inc.	DePere	WI
Senior Market Sales, Inc.	Omaha	NE
Senior Security Benefits, Inc.	Fort Worth	TX
Spring Insurance Solutions, LLC	Kansas City	MO
Yourmedicare Agencies	Clearwater	FL

Attendee Data	Accepted:	Out of:	Percent:
The Elite:	48	92	52%
Best in Class: East & Midwest	79	198	40%
Best in Class: South & West	64	166	39%
Total Attendee Count:	**191**	**456**	**42%**

Aetna Awards 2020

Program Report

Link to Final Videos

Videos have been uploaded to

Box.com > 2021 Events & Conferences > Awards20 > Final Show Files

Elite Partners Award Show
https://aetna.box.com/s/cqvrkdtyf524gwhbbxr9iah479eq808h

Best-in-Class Award Show 1 (East & Midwest)
https://aetna.box.com/s/mm962xgpq51nf16giwvdqxw8ong7lfkd

Best-in-Class Award Show 2 (South & West)
https://aetna.box.com/s/3dasz6tr88nsrfgqto13jp65a4bj04tc

Program Report

Aetna Awards 2020

PROGRAM SR. MANAGER
Toby S. Gregory, CMP