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NETWORK

National Distribution Partners 2022

Program Report



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Summary

our mission

To educate and inspire our network of Distribution Partners; to discover and delight them with the right tools and aligned resources in a way that's exciting and entertaining.

our vision:

To see Markets & Partners come together virtually for two separate but simultaneous bar-raising look-live broadcasts followed by two days of valuable virtual breakout sessions.

our objectives:

Educate & inspire; discover & delight; entertain & excite

dates:

July 19-23, 2021

format:

100% virtual with pre-recorded general session & live breakouts

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Executive Summary

business purpose

The goal of NDP is to educate Broker Partners on the current market landscape and pricing, announce the coming year's Medicare Advantage rates (this is the unveiling of First Look,) and give an opportunity to network and build/maintain relationships. NDP allows Aetna to educate Partners on key business themes that resonate with them for their organizations' success. These include: Aetna's strategy for Medicare growth, speed to have agents up and selling, and superior quality of products and services.

program description

The National Distribution Partner Summit is the gathering of the internal Aetna Markets and Product Leaders with the enterprise's key external Distribution Partners. A hybrid of in-person and virtual experiences, partners participate in general sessions where they hear from keynote speakers as well as individual Market/Partners breakout meetings over a three-day period.

This external conference is an industry-standard event. Our competitors hold a similar conference around the same time each year ahead of their upcoming sales season. Aetna is a leader and innovator for Medicare opportunities.

audience/attendee type

NDP represents a 50/50 mix of External Distribution Partners and Internal Market Leaders. Distribution Partners are agency decision makers, principles and top-level executives. Internal Market Leaders are top level management for each market. Also invited are key relationship managers as well as Aetna Medicare executives

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Stakeholders

Events & Conferences Team:

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

Medicare Advantage Team:

Matt Feret – Exe Dir, Sales Strategy
Clint Goodwin – Project Manager
Darryl Strong – Project Manager
Frankie Satterfield-Vaughn – Dir, Sales

The Agency:

Diana Hernandez – Strategic Marketing, Sr. Specialist

Learning & Performance:

Chip Peters (Francis) - Director

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

Executive Leadership:

Armando Luna, Jr. - Medicare Advantage
Ty Wooldridge - Medicare Supplement
Christopher Ciano - Aetna Medicare
Dan Finke - Aetna

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Meeting Management Approval

From: Cvent Notifications <info@cvent.com>
Sent: Monday, February 22, 2021 12:06 PM
To: Goodley, Jennifer <GoodleyJ@AETNA.com>
Subject: [EXTERNAL] 22b. Request approved for NDP 2021 on 07/19/2021, Resources need to be assigned

**** External Email - Use Caution ****

CVS Health Manager,

A The request submitted by Toby Sturgill Gregory for NDP 2021 on 07/19/2021 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	Akshay.S@cvent.com
Requester Work Phone	6297711666
Department	Medicare
Business Unit	Aetna
Cost Center	10105
Budget	525,000.00
Approving VP First Name	Armando
Approving VP Last Name	Luna, Jr.
Approving VP Email Address	lunaa@aetna.com
Who is your Executive Leadership Team (ELT) Member?	Karen Lynch
Event Information	
Event Title	NDP 2021
Event Start Date	07/19/2021 7:00 AM
Event End Date	07/22/2021 7:00 AM
Purpose of Event	The goal of the program is to educate Broker Partners on the current market landscape and pricing and announce the 2022 Medicare Advantage rates (this is the unveiling of First Look 2022). This event includes strategy sessions to review current production levels and projected production levels.
Meeting Type	Customer Summit/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	350
Services Required	Full Service – registration and logistics required
Venue Information	
If your group requires overnight accommodations, please complete the form below.	
If your group requires Hotel meeting space, please complete the form below.	
If your group requires AV, please select from the list below.	
Administrative Section	
Internal Calendaring	Signature meeting
Meeting Type(as per the newly released policy)	Large External

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Creative Brief to The Agency on 11-11-20



NDP21 Virtual Summit

11/11/2020

ASSIGNMENT DESIGNATION			
Senior Director approval (name & date)	Brent Clayton		
Assignment Name:	NDP21 Virtual Summit (We'll need 2022 on everything, though.)		
Assignment Task:	Design and Create Collateral for NDP Virtual Summit		
Business Unit (BU):	Medicare Advantage/Medicare Supplement (90% is Medicare Advantage. and the other 10% is made up of Medicare Supplement, ancillary and PDP products)		
Aetna Lead: Main Clients	Matt Feret, Executive Director, Medicare Chief Sales Officer, Brent Clayton, Director Strategic Planning, Toby Sturgill Gregory, Senior Project Manager; Chip Peters L&P director		
Go to market date:	July 20-23, 2021 (General Session Live Stream will be Tuesday, 7/20 with breakouts 7/21-23)		
When is this to be used?	Pre-enrollment <input checked="" type="checkbox"/>	Post-enrollment <input type="checkbox"/>	Both <input type="checkbox"/>
What markets will this piece be used?	National <input checked="" type="checkbox"/>	State Specific <input type="checkbox"/>	List impacted States:
Budget (local currency):	Total budget: 500,000	Production budget:	Media budget:
1557- Is this a significant document that needs non-discrim taglines/translations	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>	Unsure <input type="checkbox"/>
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 <input checked="" type="checkbox"/>	No <input type="checkbox"/>	
*Complete if this is an Aetna branded document- Will Joint Venture Versions need to be created	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>	<i>If unsure please confirm with Tania Torres at TorresT3@aetna.com</i>

OBJECTIVES & MARKET INTELLIGENCE	
Why is this initiative needed or happening? What are the project background and the relevant business, market, and competitive context?	This is the annual kickoff meeting held with National Distribution Partners (external to Aetna) to review the First Look and prepare for the 2022 Annual Enrollment Period (AEP) selling season. The general session's live broadcast will be around 3.5 hours. In the past, the event has taken place in a physical location, but like last year, it'll be taking place online due to COVID 19 and travel restrictions. The online platform and production partner is TBD. With the shift from an on-site to virtual conference, there are challenges the business and The Agency needs to think about and solve for like:

Deleted: The event is no longer taking place in a physical location as it has been in years past due to COVID-19 and travel restrictions. It will be moving to an online platform, which is a TBD decision, but should know something by December 2020.

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	<ul style="list-style-type: none"> o Getting brokers excited and wanting to register to attend NDP (they typically do not need incentives to attend as the conference equips them with critical sales info)—teaser video o Educating brokers and getting them excited about: <ul style="list-style-type: none"> • The unveiling of First Looks 2022 Medicare Advantage rates • How to sell considering the pandemic reality and solutions we offer that directly help their customers • New initiatives the company is taking to help enhance and grow their business in the coming year o Maintain an exciting/empowering mood and tone of event <p>Position Aetna as an industry leader and innovator for Medicare opportunities (sales and distribution)</p>
<p>What is the business goal? What is Aetna's business objective that this communications effort is meant to help achieve?</p>	<p>Getting brokers excited and wanting to register to attend NDP (they typically do not need incentives to attend as the conference equips them with critical sales info).</p>
<p>What is the communication objective? How can marketing communications help you achieve the business goal?</p>	<p>Increase awareness and drive virtual conference registrations.</p>
<p>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?</p>	<p>National Distribution Partners</p> <p>Our National Distribution Partners are (strategic partners) owners of independent agencies and they and their Marketers and Compliance Officers are pivotal to the partnership. Key business themes that resonate with them for their organizations' success include: Aetna's strategy for Medicare growth, speed to have agents up and selling, superior quality of product and servicing. Aetna as a leader and innovator for Medicare opportunities (sales and distribution) is of high interest to the audience.</p> <p>Participants include top level FMOs (Field Marketing Organizations) and strategic partners. Most of these hold top level contracts with Aetna (if they hold top level contracts they are paid the highest level commissions).</p> <ul style="list-style-type: none"> - The agencies themselves are present year over year, but the personnel that is sent per agency can change year over year. <p>Approximately 600 guests attended last year's virtual live stream (external partners and internal sales markets)—mix of 50/50. Male vs. female—mix of 70/30</p> <p>We typically do not need to incentivize attendees to come to our event, but with the switch to virtual, we need to get NDP's excited for it. We want them to know that this is not like other WebEx or Zoom meetings. This went over really well, and we're excited to plus the experience in all directions.</p> <p>They are already incentivized as they want to learn about products/pricing/markets and attend in order to be able to sell our products and be successful.</p>
<p>What do we want our audience to DO as a result of our communications? What is the key behavioral outcome?</p>	<p>We want NDP's to be excited and register to attend the NDP virtual conference.</p>

Deleted: <#>Providing innovative solutions for networking/engagement opportunities

Deleted: , and keeping them engaged post-conference

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Deleted: Keep folks engaged post-conference.

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MESSAGE

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<p>Brand Vision, Brand Promise, and Aetna Brand Campaign</p> <p>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.</p>	<p>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.</p> <p>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.</p> <p>All marketing should align with the new Brand Vision and Promise. <i>The campaign line is not mandatory for business unit communications but must be included in all Aetna Brand Advertising.</i></p> <p>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.</p> <p>Brand Promise: Turning health ambitions, big and small, into achievements</p> <p>Campaign: You don’t join us, we join you</p> <p>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.</p>
<p>Key message What is the main message we need to communicate in this assignment?</p>	<p>Aetna provides a top of the line Medicare product portfolio at a competitive price point for Medicare eligible members/prospective members.</p>
<p>Why should the audience believe this message? Support Points & Reasons to Believe.</p> <p>What are specific products or services that support the key message?</p> <p>What unique or relevant product characteristics, facts about users or usage, or competitive benefits would persuade people of our message?</p> <p>Are there any legally approved facts or claims that can be made?</p>	<p>This is why we’re unstoppable:</p> <ol style="list-style-type: none"> 1. Med Advantage and Med supp sales have not stopped. We’ve exceeded sales expectations during the pandemic. 2. Agents (MA) are servicing their clients in new ways, including: going to get groceries, parking in front of their house so the client knew they were not a fraud while talking on the phone and working with them to change their policy 3. No downtime with service, Aetna moved all operations to home with no interruption with service. 4. Now we are going into the new Sales season for MA and just because we cannot meet in person does not mean we cannot meet: webex, zoom, phone video chat, online apps. 5. Setting up payment options for tough times <p>Now we cannot meet physically face to face, but we can meet virtually.</p> <p>As the country comes out of the crisis in 2021 (hopefully), how this new normal and virtual are here to stay. New capabilities makes us stronger and more agile.</p>
<p>Brand Voice The Brand Voice also stays constant across all Aetna marketing efforts, to ensure</p>	<p>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. We embrace our members with warmth and understanding. We take the time to explain plans and benefits, really listen to what our members are saying, and help interpret their needs.</p>

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<p>Aetna sounds and acts the same across touchpoints.</p>	<p>Empathetic communication is: Sincere <i>but not</i> "fluffy", Compassionate <i>but not</i> inauthentic, Perceptive <i>but not</i> assumptive, Consumer focused <i>but not</i> product focused</p> <p>Empowering: We know that the hardest part of any journey is getting started, so we are here to help members explore all the ways that their healthy ambitions can be achieved and join them as they navigate their path to wellness on their own terms. We are dedicated to helping members define, and then achieve any goals they set for themselves. We offer options as well as active and authentic support to them in every interaction.</p> <p>Empowering communication is: Inspiring <i>but not</i> preachy, Motivational <i>but not</i> overbearing, Encouraging <i>but not</i> in-your-face, Confidence boosting <i>but not</i> bossy, Well-informed <i>but not</i> lecturing, Knowledgeable <i>but not</i> authoritative</p> <p>Progressive: We are resourceful, inventive, and committed to making tomorrow better than today. We push ourselves to innovate and constantly find new ways to help each member to achieve his or her health goals.</p> <p>Progressive communication is: Hopeful and positive <i>but not</i> unrealistic, Forward-thinking <i>but not</i> vague, Energetic <i>but not</i> unfocused, Ambitious <i>but not</i> overbearing</p> <p>Clear: We avoid complexity and jargon wherever possible. We are transparent and speak in simple, straightforward language that is easy to understand.</p> <p>Clear communication is: Plain <i>but not</i> boring, Direct <i>but not</i> blunt, Simple <i>but not</i> simplistic, Conversational <i>but not</i> unprofessional</p>
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DELIVERABLES & LOGISTICS	
<p>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)?</p>	<p>CONCEPT/THEME: - Concept/theme - Program graphic treatment (.eps/design files to Toby for internal needs)</p> <p>MAILINGS: - Pre-Trip Mailer to External Partners (Previously we've done a poster and mailer tube. We MAY not do this one this year since people won't be in an office to see what we send.) This is the post card which will go arrive the same day that the Save the Date email goes out. - Binge Box: To arrive at external's homes the Friday before the General Session. Elements should include VUtv Guide, plus other themed conference materials.</p> <p>EMAIL: - Email: Blank OFT (Mac compatible version, too, please.) - Email: Save-the-Date (one for all attendees) - Email: Thank You! (with link to Post-Event Survey) - Email: Breakout Schedules Template</p> <p>VUtv Guide: - Attendee Book (last year's was 8.5x11, spiral-bound) • Letter from Matt Feret • Letter from Armando Luna, Jr.</p>

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	<ul style="list-style-type: none"> • Agenda Spread • First Look 2022 information • Speaker's Photo & Bio spread + any conference materials they might want to include. • Notes • Calendar/Planner with notes and key dates (Perfd for tear out.) <p>GRAPHICS:</p> <ul style="list-style-type: none"> • Cvent Graphics • Market Graphics for Hopin (pending approval to use it.) <p>POWERPOINT TEMPLATES:</p> <ul style="list-style-type: none"> • Internal Training Meeting • Markets/Breakouts <p><u>Armando Luna's</u></p> <ul style="list-style-type: none"> • General Session <p><i>** these need to be created with no more than 6 lines of copy and no more than 6 words per line. I'd REALLY, REALLY, REALLY like to reimagine how these are created and would prefer them to NOT look like a PowerPoint template. (See also: Apple's virtual events from 2020 here: https://www.apple.com/apple-events/) Start with the one in June and see how they progressively get more and more impressive.</i></p> <p>VIDEOS:</p> <ul style="list-style-type: none"> • teaser/commercial • diamond partners recognition <p>FORMS/TEMPLATES:</p> <ul style="list-style-type: none"> • Market Evaluation Form (editable PDF) • Internal Training Meeting (Word template) • Post Event Survey <p>Collaborate with external virtual production group</p> <p><u>Communications matrix</u></p>
<p>Executorial Mandatories</p> <p>What criteria must this work meet? Are there any legal requirements?</p> <p><u>All PRINTED MEMBER mailing communications need a production attestation form. Please supply completed form to your print production specialist prior to mailing.</u></p>	<p>"NDP" should not be used. National Distribution Partners should always be spelled out in all communication/collateral</p> <p>All materials should use the Aetna Medicare Solutions logo, and the theme/concept should not be Aetna-branded.</p> <p>Collaborate with internal Agency team that is working on FirstLook to see if there is need for crossover in communication, collateral, etc.</p> <p>Event itself should be referred to as Aetna's National Distribution Partner Virtual Summit 2022</p> <p>Collaborate with event team on external virtual production partner on event deliverables</p>
<p>Markets</p> <p>Where will this work be running? Are there any heavy-up markets? Are there any markets to avoid, and if so, why?</p>	
<p>Organizational Dependencies</p>	<p>Medicare Sales, Marketing, Legal and Compliance</p>

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What parts of the organization need to be aligned to make this 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?	First Look may be a consideration to include in communications This is an annual event and Aetna is known as hosting the best event in the industry compared to competitors (Sigma, Humana, AARP and the Blues). Present event concepts to Brent/team prior to presenting to Armando.

Deleted: We have the ability to host videos on the First Look page

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?	Event is July 20 with breakouts July 21-23, 2021. Key dates can be determined around the communications plan.

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

PREPARATION	
<p>Privacy, Compliance, and Legal Always consult with your <u>privacy, compliance</u>, and legal lead. Please list any comments or concerns.</p>	
<p>Vendors Is an external vendor involved? If so, who is the vendor? Have they been approved by procurement?</p>	
<p>Digital Governance All new digital initiatives and major enhancements to existing digital assets should come through <u>Digital Governance</u>. Please have the Business Owner complete the <u>digital intake request</u> 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</p>	

STRATEGIC	
<p>PoC or live Is this a proof of concept, or will this be pushed live?</p>	
<p>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 living? Will there be an offline version? If so what format will the offline version need to be in?</p>	
<p>Ownership Who will the responsible for building it? Who will be responsible for maintaining the asset(s) after release?</p>	

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TECHNICAL	
<p>Email If an email, what format does it need to be in? HTML, OFT, or both?</p> <p>NOTE: HTML is responsive; OFT is not</p>	
<p>Banner ads If banner ads, what are the paid media specs for all pieces, including banner sizes?</p> <p>Will the banners be animated, or static?</p>	
<p>Sites & landing pages If a website or a landing page, where do you plan to host, or where is it hosted currently?</p> <p>Does the initiative require a new or reactivation of a URL? If so, what is the URL?</p> <p>NOTE: can be copied from digital intake request form</p>	
<p>Browsers Are there any known browser support requirements? Standard requirements:</p> <p><i>Microsoft Internet Explorer/Edge</i></p> <ul style="list-style-type: none"> • Edge 15 • Edge 14 • Explorer 11 <p><i>Google Chrome</i></p> <ul style="list-style-type: none"> • Google Chrome - Most recent 3 versions • Chrome Mobile - Most recent 3 versions <p><i>Safari</i></p> <ul style="list-style-type: none"> • Most Recent 3 versions <p><i>Firefox</i></p> <ul style="list-style-type: none"> • Most Recent Version 	
<p>Restrictions Are there any known technical restrictions on the end users side (i.e. outdated software versions, etc.?)</p>	
<p>Note about responsive Assume that anything live will need to be built to be responsive. More on responsive design here.</p>	

National Distribution Partners 2022

Theme/Concept

The idea for this year was to communicate information as if we were on a late-night TV show. Our host was Matt Feret and each segment had it's own spot inside the show. Next Year Now is a show on the **VUtv Network** we created last year.



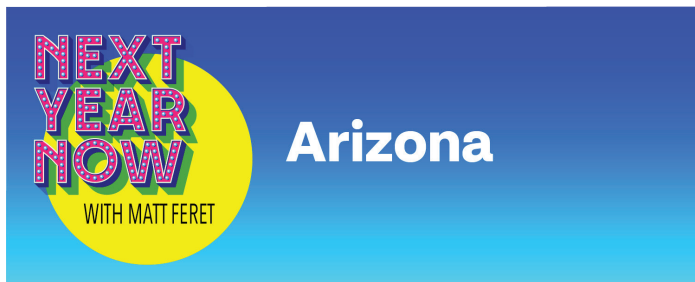
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Artwork

The challenge was blending the concept of a late-night TV show with a day-time audience.



Breakout graphics



Email header



Email header

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Agenda/Run of Show

Time	TRT	Action
8:45:00 AM	0:15	Pre-Show Band
9:00:00 AM	0:03	Commerical 1 - Aetna Medicare Commercial
9:03:00 AM	0:03	Commerical 2 - Aetna Medicare Commercial
9:06:00 AM	0:00	VU TV Network ID
9:06:30 AM	0:01	Teaser Video (what was sent out a few days before)
9:07:30 AM	0:01	Next Year Now, Title Sequence: Opening Video
9:08:30 AM	0:05	Segment 1 - Next Year Now ... is Now (Matt's Monologue)
9:13:30 AM	0:05	Segment 2 - Matt's Top 10 List Tease Omar Segment coming up after break
9:18:30 AM	0:01	E & C Commercial
9:19:30 AM	0:01	Commercial 3 (Mandy's Retail #1)
9:20:30 AM	0:20	Segment 3 - Special Guest: Omar Johnson
9:40:30 AM	0:01	Commercial 4 (Mandy's Retail #2)
9:41:30 AM	0:00	VU TV Network ID
9:42:20 AM	0:00	The First VU Opening Title Sequence
9:42:35 AM	0:10	Segment 4 - The First VU - P1
9:52:35 AM	0:10	<i>P2: First VU Panel Discussion/Group Interview by Armando, Terri & Ty</i>
10:02:35 AM	0:00	The First VU Opening Closing Title Stinger
10:02:40 AM	0:10	BREAK
10:12:40 AM	0:00	VU TV Network ID
10:12:55 AM	0:00	Next Year Now (Title Sequence Abridged)
10:13:00 AM	0:02	Welcome Back/toss to Dan's video
10:15:00 AM	0:10	Segment 5 - Dan Finke's Story (theme/concept TBD)
10:25:00 AM	0:01	Matt Toss to Awards
10:26:00 AM	0:02	Segment 6a - The Diamond Awards Segment 6b - The Elite Frontrunners (197 names, scrolled)
10:28:00 AM	0:05	Entertainment - Optional, up and coming Nashville singer/songwriter
10:33:00 AM	0:01	Matt Toss
10:34:00 AM	0:01	Marketing Commercial
10:35:00 AM	0:10	Segment 7 - Market Outlook: Tim Time
10:45:00 AM	0:01	Matt Toss "we'll be right back"
10:46:00 AM	0:01	Commercial 5 (Mandy's Retail #3)
10:47:00 AM	0:01	Commercial 6 - 2022 Medicare Commerical
10:48:00 AM	0:05	Segment 8 - Programming Notes: Breakouts FYIs
10:53:00 AM	0:10	Segment 9 - What Matters Next Year, Now (Matt's Segment)
11:03:00 AM	0:02	Segment 10 - That's a Wrap
11:05:00 AM		

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Awards + NDP + Gold Circle filming schedule

Version: June 18, 2021

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				
	Armando and Chris Out			
All Day	Awards21	Arrive into Nashville	Matt	
Call time: 8:15am	NDP21	Edit Best in Class #2	GWC Crew	
9-10:30am	NDP21	The FIRST VU	Armando & Ty (Chris & Terri are remote)	
10:30-10:45am	NDP21	Rehearse: The FIRST VU	Armando & Ty (Chris & Terri are remote)	Business Casual
10:45am-1pm	NDP21	Film: The FIRST VU	Armando & Ty (Chris & Terri are remote)	
Call time: 12pm	Awards21	Hair/Makeup	Armando & Ty	
1-1:30pm		Arrive to Go West Studios	Steve & Matt	
1:30-3pm	Awards21	Lunch		
1:30-3pm	Awards21	Cue-to-Cue	GWC Crew	flutes for champagne 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	

**National
Distribution
Partners
2022**

Program Report

Project Plan Smartsheet/21-NDP-Virtual/NDP21 plan

Column 15	Task Name	Start	Due	Finish	Duration	Assigned To	Status
1	Initiation Phase	09/16/20	01/01/21	12/25/20	78d		Complete
2	Stakeholders	12/07/20	12/11/20	12/11/20	5d		Complete
3	Est/ID Stakeholders	12/07/20	12/08/20	12/08/20	2d	Toby S. Gregory, CMP	Complete
4	Stakeholder Event Definition	12/09/20	12/11/20	12/11/20	3d	Toby S. Gregory, CMP	Complete
5	Set Mission/Vision/Objectives	12/09/20	12/11/20	12/11/20	3d	Matt Feret	Complete
6	Establish Budget	09/16/20	01/01/21	12/18/20	78d	Brent Clayton	Complete
7	Create budget in Smartsheet	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	Create Meeting Management Request	12/25/20	12/25/20	12/25/20	1d	Toby S. Gregory, CMP	Complete
13							
14	Planning Phase	12/28/20	02/04/21	02/08/21	29d		Complete
15	Creative Brief	12/28/20	01/01/21	12/18/20	5d	Toby S. Gregory, CMP	Complete
16	Initial Draft by Project Manager	12/28/20	12/29/20	12/29/20	2d	Toby S. Gregory, CMP	Complete
17	Director Review	12/30/20	12/31/20	12/31/20	2d	Toby S. Gregory, CMP	Complete
18	Final/Approved Brief to The Agency	01/01/21	01/01/21	01/01/21	1d	Toby S. Gregory, CMP	Complete
19	Create Project Plan	01/29/21	02/01/21	02/01/21	2d	Toby S. Gregory, CMP	Complete
20	Establish Event Team	01/11/21	02/01/21	02/01/21	16d	Toby S. Gregory, CMP	Complete
21	Meeting Schedules	01/11/21	02/04/21	02/08/21	19d		Complete
22	Schedule Management Team Meetings	01/11/21	02/04/21	02/08/21	19d	Brent Clayton	Complete
23	Schedule Project Team Meetings	01/11/21	02/04/21	02/03/21	19d	Toby S. Gregory, CMP	Complete
24	Calendar Holds for Program Dates	01/11/21	02/01/21	02/01/21	16d	Toby S. Gregory, CMP	Complete
25	Reserve dates with the Stream Team						
26	Exe Assistant Meetings Scheduled	01/11/21	02/04/21	02/05/21	19d	Toby S. Gregory, CMP	Complete
27							
28	Implementation Phase	01/25/21	07/22/21	07/19/21	129d		Complete
29	INVITE LISTS	01/25/21	03/17/21	03/16/21	38d		Complete
30	2020's List to Clint	02/01/21	02/15/21	02/08/21	11d	Toby S. Gregory, CMP	Complete
31	Aetna Internals (Staff/Non-Markets)	02/15/21	03/05/21	02/23/21	15d	Clint Goodwin	Complete
32	Have EC evaluate who's coming from Med Supp side	02/15/21	03/10/21	03/09/21	18d	Brent Clayton	Complete
33	National Sales Team List to Toby	01/25/21	03/05/21	02/23/21	30d	Clint Goodwin	Complete
34	External Partners list to Toby	01/25/21	03/05/21	02/23/21	30d	Clint Goodwin	Complete
35	Internal Markets list to Toby	01/25/21	03/05/21	03/05/21	30d	Darryl R Strong	Complete
36	The Agency's list to Toby	03/08/21	03/09/21	03/09/21	2d	Diana Hernandez	Complete
37	Toby compiles full new list	03/05/21	03/09/21	03/09/21	3d	Toby S. Gregory, CMP	Complete
38	Create Late Adds smartsheet form	03/05/21	03/09/21	03/09/21	3d	Toby S. Gregory, CMP	Complete
39	Invitation Lists to Matt & Armando for Approval	03/10/21	03/10/21	03/09/21	1d	Toby S. Gregory, CMP	Complete
40	Final approval from Matt and Armando	03/09/21	03/12/21	03/12/21	4d	Matt Feret	Complete
41	Initial Invite List Finalized*	03/17/21	03/17/21	03/16/21	1d	Toby S. Gregory, CMP	Complete
42	BRANDING/THEME	02/01/21	04/05/21	04/05/21	46d		Complete
43	Concepts, First Round to Toby	02/01/21	02/25/21	02/25/21	19d	Diana Hernandez	Complete
44	Feedback from Toby to The Agency	02/25/21	03/04/21	03/04/21	6d	Toby S. Gregory, CMP	Complete
45	Final Direction Set	02/01/21	03/08/21	03/30/21	26d	Diana Hernandez	Complete
46	Style Guide Due	02/01/21	04/05/21	04/05/21	46d	Diana Hernandez	Complete
47	SAVE THE DATE EMAIL	02/01/21	03/23/21	03/31/21	37d		Complete
48	First Round	02/01/21	02/25/21	02/25/21	19d	Diana Hernandez	Complete
49	Feedback due to The Agency	02/25/21	03/23/21	03/23/21	19d	Toby S. Gregory, CMP	Complete
50	Email list for STD email	03/18/21	03/18/21	03/15/21	1d	Toby S. Gregory, CMP	Complete
51	Final Design	03/04/21	03/17/21	03/30/21	10d	Diana Hernandez	Complete
52	Deploy STD	03/22/21	03/22/21	03/31/21	1d	Toby S. Gregory, CMP	Complete
53	Blank OFT (mac-based files too)	03/17/21	03/17/21	03/30/21	1d	Diana Hernandez	Complete
54	AGENDA	01/29/21	04/14/21	04/12/21	54d		Complete
55	High Level Agenda	01/29/21	01/29/21	01/29/21	1d	Toby S. Gregory, CMP	Complete
56	Send Matt last year's to get him going	02/04/21	02/04/21	02/04/21	1d	Toby S. Gregory, CMP	Complete
57	Quick Agenda	02/01/21	02/25/21	03/04/21	19d	Matt Feret	Complete

Column 15	Task Name	Start	Due	Finish	Duration	Assigned To	Status
58	☆ Quick & Long Agenda ready for TA to name segments	03/17/21	03/25/21	03/22/21	7d	Toby S. Gregory, CMP	Complete
59	☆ The Agency to have named segments	03/22/21	04/07/21	04/01/21	13d	Diana Hernandez	Complete
60	☆ Final Agenda (Keynote Speakers, Presenters, etc.)	01/29/21	04/14/21	04/12/21	54d	Toby S. Gregory, CMP	Complete
61	☆ KEYNOTE SPEAKER	02/01/21	05/14/21	05/14/21	75d		Complete
62	☆ Ask Matt who he wants	02/02/21	02/04/21	02/03/21	3d	Toby S. Gregory, CMP	Complete
63	☆ Keynote Speaker wishlist due	02/01/21	02/25/21	03/05/21	19d	Matt Feret	Complete
64	☆ Keynote Speaker List from Kim	03/12/21	03/18/21	03/15/21	5d	Kim Murawski	Complete
65	☆ Approval from Matt	03/16/21	03/24/21	03/22/21	7d	Matt Feret	Complete
66	☆ Requesting: Omar Johnson	03/22/21	04/29/21	04/26/21	29d	Kim Murawski	Complete
67	☆ Compliance questions to Jake (cc: Jenn and Kim)	04/20/21	04/20/21	04/20/21	1d	Toby S. Gregory, CMP	Complete
68	☆ Compliance Approval	04/20/21	04/26/21	04/26/21	5d	Toby S. Gregory, CMP	Complete
69	☆ Signed Contract	04/27/21	05/14/21	05/14/21	14d	Kim Murawski	Complete
70	☆ Communications Matrix	02/09/21	02/19/21	02/17/21	9d	Diana Hernandez	Complete
71	☆ CVENT GRAPHICS	02/01/21	04/15/21	04/14/21	54d		Complete
72	☆ Specs to The Agency from Kim	02/19/21	02/26/21	02/17/21	6d	Kim Murawski	Complete
73	☆ Concepts, First Round	02/01/21	04/09/21	04/08/21	50d	Diana Hernandez	Complete
74	☆ Feedback to The Agency by	04/09/21	04/09/21	04/08/21	1d	Toby S. Gregory, CMP	Complete
75	☆ Final Files to Toby	04/14/21	04/14/21	04/14/21	1d	Diana Hernandez	Complete
76	☆ CVENT Graphics to Kim	04/15/21	04/15/21	04/14/21	1d	Toby S. Gregory, CMP	Complete
77	☆ WEBSITE	04/14/21	07/14/21	07/06/21	66d		Complete
78	☆ Sitemap	04/14/21	04/14/21	04/14/21	1d	Toby S. Gregory, CMP	Complete
79	☆ Welcome Copy	04/14/21	04/14/21	04/05/21	1d	Diana Hernandez	Complete
80	☆ First Look	04/14/21	04/14/21	04/14/21	1d	Diana Hernandez	Complete
81	☆ CVENT Graphics	04/14/21	04/14/21	04/14/21	1d	Diana Hernandez	Complete
82	☆ Final Agenda	04/14/21	04/14/21	04/14/21	1d	Matt Feret	Complete
83	☆ Speakers Pics + Bio	04/21/21	04/28/21	04/27/21	6d	Kim Murawski	Complete
84	☆ Website goes Live	05/14/21	05/25/21	05/25/21	8d	Kim Murawski	Complete
85	☆ Livestream Link	04/14/21	07/14/21	07/06/21	66d	Sara Linton	Complete
86	☆ HOPIN BREAKOUT GRAPHICS	03/08/21	07/13/21	07/06/21	92d		Complete
87	☆ Final list of Market names	03/08/21	03/08/21	03/08/21	1d	Darryl R Strong	Complete
88	☆ Final list of Breakout Rooms needed	03/22/21	03/25/21	03/23/21	4d	Toby S. Gregory, CMP	Complete
89	☆ Specs from GWC to The Agency	03/09/21	03/09/21	03/03/21	1d	Sara Linton	Complete
90	☆ Concepts, First Round	03/09/21	04/30/21	04/29/21	39d	Diana Hernandez	Complete
91	☆ Finals to Toby	03/09/21	05/07/21	05/07/21	44d	Diana Hernandez	Complete
92	☆ Hopin Graphics to GWC	03/09/21	05/07/21	05/07/21	44d	Toby S. Gregory, CMP	Complete
93	☆ Hopin Copy to GWC	03/09/21	07/13/21	07/06/21	91d	Diana Hernandez	Complete
94	☆ THANK YOU + POST EVENT SURVEY EMAIL	03/22/21	07/22/21	07/13/21	89d		Complete
95	☆ Survey Questions from last year to Matt and Chip	03/22/21	03/22/21	03/22/21	1d	Toby S. Gregory, CMP	Complete
96	☆ Survey Question edits back to Toby	03/22/21	03/25/21	03/25/21	4d	Chip Peters	Complete
97	☆ Final list of survey questions to The Agency	03/26/21	03/26/21	03/25/21	1d	Toby S. Gregory, CMP	Complete
98	☆ Concepts, First Round	06/22/21	06/22/21	06/22/21	1d	Diana Hernandez	Complete
99	☆ Final files to Toby	07/22/21	07/22/21	07/13/21	1d	Diana Hernandez	Complete
100	☆ PRESENTATION GRAPHICS	02/23/21	06/18/21	05/21/21	84d		Complete
101	☆ General Session Template	05/20/21	06/18/21	05/25/21	22d		Complete
102	☆ First Round	05/21/21	05/21/21	05/20/21	1d	Diana Hernandez	Complete
103	★ Final Files to Toby	05/20/21	06/18/21	05/25/21	22d	Diana Hernandez	Complete
104	☆ Breakout Sessions Template	02/23/21	06/16/21	05/21/21	82d		Complete
105	☆ Last year's files to Toby for Clint to Markup	02/23/21	02/24/21	02/23/21	2d	Diana Hernandez	Complete
106	☆ Last year's files from Toby to Clint to markup	02/23/21	02/24/21	02/23/21	2d	Toby S. Gregory, CMP	Complete
107	☆ Last year's files marked up with Clint's new edits	02/23/21	04/05/21	03/17/21	30d	Clint Goodwin	Complete
108	☆ First Round	05/28/21	05/28/21	05/13/21	1d	Diana Hernandez	Complete
109	☆ Final Files to Toby	06/16/21	06/16/21	05/20/21	1d	Diana Hernandez	Complete
110	☆ Files to Clint	06/16/21	06/16/21	05/21/21	1d	Toby S. Gregory, CMP	Complete
111	☆ REGISTRATION EMAIL	02/15/21	05/26/21	05/26/21	73d		Complete
112	☆ Data points we need to capture to Kim	02/15/21	02/18/21	02/16/21	4d	Toby S. Gregory, CMP	Complete
113	☆ Registration Paths identified	02/22/21	02/22/21	02/22/21	1d	Toby S. Gregory, CMP	Complete
114	☆ First Round to Toby	04/29/21	05/25/21	05/25/21	19d	Kim Murawski	Complete

Column 15	Task Name	Start	Due	Finish	Duration	Assigned To	Status
115	Final Design	05/19/21	05/25/21	05/25/21	5d	Kim Murawski	Complete
116	Updated invite list to Kim	05/19/21	05/19/21	05/21/21	1d	Toby S. Gregory, CMP	Complete
117	Deploy Registration Email	05/24/21	05/26/21	05/26/21	3d	Kim Murawski	Complete
118	REGISTRATION	05/25/21	06/04/21	06/04/21	9d		Complete
119	Registration Opens*	05/25/21	05/26/21	05/26/21	2d	Kim Murawski	Complete
120	Registration Closes*	06/04/21	06/04/21	06/04/21	1d	Kim Murawski	Complete
121	HOPIN COMMUNICATIONS	03/18/21	07/19/21	07/19/21	88d		Complete
122	Get the communications flow from Rick	03/18/21	03/26/21	03/19/21	7d	Toby S. Gregory, CMP	Complete
123	Look over copy and rewrite as needed	03/22/21	07/08/21	07/06/21	79d	Toby S. Gregory, CMP	Complete
124	Last Live Stream Link Reminder Email	07/19/21	07/19/21	07/19/21	1d	Toby S. Gregory, CMP	Complete
125	BREAKOUT SCHEDULES	01/25/21	07/15/21	07/15/21	124d	Jennifer Simioni	Complete
126	Markets List	01/25/21	03/05/21	03/05/21	30d	Darryl R Strong	Complete
127	Partners List	01/25/21	03/05/21	02/23/21	30d	Clint Goodwin	Complete
128	Frankie, John and Amy to ask Partners for their preferences	05/26/21	06/09/21	06/07/21	11d	Frankie Satterfield-Vaughn	Complete
129	Top 10 picks from Frankie, John and Amy	06/09/21	06/23/21	06/07/21	11d	Frankie Satterfield-Vaughn	Complete
130	Markets/Partners Scheduled Out	06/30/21	07/08/21	07/06/21	7d	Jennifer Simioni	Complete
131	Schedule routed to Frankie, Clint and Matt for approval	07/06/21	07/07/21	07/06/21	2d	Toby S. Gregory, CMP	Complete
132	PDFs created and sent out	07/06/21	07/09/21	07/09/21	4d	Toby S. Gregory, CMP	Complete
133	Breakout Schedules Emailed Via Hopin	07/13/21	07/15/21	07/15/21	3d	Toby S. Gregory, CMP	Complete
134	BREAKOUT SCHEDULES EMAIL						Complete
135	Markets Template First Round						Complete
136	Partners Template First Round						Complete
137	Email Templates First Round						Complete
138	Email Template Final Files to Toby						Complete
139	VIRTUAL BROADCAST PREP	02/01/21	07/19/21	07/19/21	121d		Complete
140	Secure Production Partner	02/01/21	02/01/21	02/01/21	1d	Brent Clayton	Complete
141	Quick Agenda to GWC for production planning	03/22/21	03/22/21	03/22/21	1d	Toby S. Gregory, CMP	Complete
142	Get in touch with CVS Stream Team for broadcast	06/23/21	06/30/21	06/30/21	6d	Toby S. Gregory, CMP	Complete
143	Agent Stream URL from Stream Team	03/02/21	07/08/21	07/07/21	93d	Sara Linton	Complete
144	Agent list from Frankie and Kim A.	07/07/21	07/08/21	07/07/21	2d	Toby S. Gregory, CMP	Complete
145	STD/Invite Email to Agent Audience	07/07/21	07/12/21	07/12/21	4d	Toby S. Gregory, CMP	Complete
146	Broadcast Link to Agent Audience	07/07/21	07/19/21	07/19/21	9d	Toby S. Gregory, CMP	Complete
147	Broadcast Link to Broker Audience	07/07/21	07/19/21	07/19/21	9d	Toby S. Gregory, CMP	Complete
148	Hopin Breakout Rooms	03/02/21	07/14/21	07/12/21	97d	Sara Linton	Complete
149	Send list of rooms needed to Sara.	04/21/21	04/21/21	04/21/21	1d	Toby S. Gregory, CMP	Complete
150	Setup Breakout Rooms	03/02/21	06/30/21	06/30/21	87d	Sara Linton	Complete
151	Breakout session leaders list to Rick	04/21/21	07/14/21	07/14/21	61d	Clint Goodwin	Complete
152	Agent-focused Show Flow					Matt Feret	Complete
153	Run of Show					Toby S. Gregory, CMP	Complete
154	PRESENTER SEGMENTS	02/01/21	07/08/21	07/06/21	114d		Complete
155	Ask Matt for his thoughts	02/04/21	02/04/21	02/03/21	1d	Toby S. Gregory, CMP	Complete
156	Matt's presenters list due	02/01/21	02/25/21	03/04/21	19d	Matt Feret	Complete
157	Compile list of Presenters and contact them	03/16/21	05/07/21	05/03/21	39d	Toby S. Gregory, CMP	Complete
158	Contact Dan Finke's office	05/03/21	05/03/21	05/03/21	1d	Brent Clayton	Complete
159	Contact Chris Ciano's office	05/03/21	05/03/21	05/03/21	1d	Brent Clayton	Complete
160	Segment 1 - Next Year Now... is Now	04/20/21	06/30/21	06/30/21	52d	Toby S. Gregory, CMP	Complete
161	Segment Outline Written	04/20/21	05/19/21	05/19/21	22d	Kim Aguirre	Complete
162	Segment Copy Written	05/17/21	06/30/21	06/30/21	33d	Sara Linton	Complete
163	Copy Approval	06/07/21	06/30/21	06/30/21	18d	Matt Feret	Complete
164	Segment 2 - Dan's Story	04/20/21	06/29/21	06/29/21	51d	Toby S. Gregory, CMP	Complete
165	Segment Outline Written	04/20/21	05/19/21	05/19/21	22d	Toby S. Gregory, CMP	Complete
166	Segment Film Date	06/29/21	06/29/21	06/29/21	1d	Toby S. Gregory, CMP	Complete
167	Segment 3 - The FIRST VU: Every View on 2022	04/20/21	06/17/21	06/17/21	43d	Toby S. Gregory, CMP	Complete
168	Segment Outline Written	04/20/21	05/19/21	05/19/21	22d	Kim Aguirre	Complete
169	Segment Copy Written	05/17/21	06/09/21	06/09/21	18d	Sara Linton	Complete
170	Copy Approval	06/07/21	06/17/21	06/17/21	9d	Matt Feret	Complete
171	Segment 4 - Matt's Top 10 List	04/20/21	07/07/21	07/06/21	57d	Sara Linton	Complete

Column 15	Task Name	Start	Due	Finish	Duration	Assigned To	Status
172	☆ Segment Outline Written	04/20/21	06/30/21	06/30/21	52d	Kim Aguirre	Complete
173	☆ Segment Copy Written	05/17/21	07/07/21	07/06/21	38d	Sara Linton	Complete
174	☆ Copy Approval	06/07/21	07/07/21	07/06/21	23d	Toby S. Gregory, CMP	Complete
175	☆ Segment 5 - Keynote Speaker - Omar Johnson	04/20/21	07/08/21	07/05/21	58d		Cancelled
176	☆ Segment Outline Written	04/20/21	06/17/21	06/17/21	43d	Toby S. Gregory, CMP	Cancelled
177	☆ Segment Copy Written	05/17/21	06/17/21	06/17/21	24d	Toby S. Gregory, CMP	Cancelled
178	☆ Copy Approval	06/07/21	07/08/21		24d		Cancelled
179	☆ Segment 6A - The Diamond Awards (Broker Partner Show)	04/20/21	06/30/21	06/30/21	52d	Toby S. Gregory, CMP	Complete
180	☆ Segment Outline Written	04/20/21	05/19/21	05/19/21	22d	Kim Aguirre	Complete
181	☆ Segment Copy Written	05/17/21	06/30/21	06/30/21	33d	Sara Linton	Complete
182	☆ Copy Approval	06/07/21	06/30/21	06/30/21	18d	Matt Feret	Complete
183	☆ Segment 6B - The Diamond Awards (Agent Show)	04/20/21	06/30/21	06/30/21	52d	Toby S. Gregory, CMP	Complete
184	☆ Segment Outline Written	04/20/21	05/19/21	05/19/21	22d	Kim Aguirre	Complete
185	☆ Segment Copy Written	05/17/21	06/30/21	06/30/21	33d	Sara Linton	Complete
186	☆ Copy Approval	06/07/21	06/30/21	06/30/21	18d	Matt Feret	Complete
187	☆ Segment 7 - Programming Notes - Breakouts	04/20/21	07/07/21	07/06/21	57d	Toby S. Gregory, CMP	Complete
188	☆ Segment Outline Written	04/20/21	05/19/21	05/19/21	22d	Kim Aguirre	Complete
189	☆ Segment Copy Written	05/17/21	07/07/21	07/06/21	38d	Sara Linton	Complete
190	☆ Copy Approval	06/07/21	07/07/21	07/06/21	23d	Matt Feret	Complete
191	☆ Segment 8 - Market Outlook- Foresight is 2022	04/20/21	06/30/21	06/29/21	52d	Toby S. Gregory, CMP	Complete
192	☆ Segment Outline Written	04/20/21	05/19/21	05/19/21	22d	Toby S. Gregory, CMP	Complete
193	☆ Segment Copy Written	05/17/21	06/30/21	06/29/21	33d	Sara Linton	Complete
194	☆ Copy Approval	06/07/21	06/30/21	06/29/21	18d	Matt Feret	Complete
195	☆ Segment Graphics	05/17/21	06/30/21	06/29/21	33d	Toby S. Gregory, CMP	Complete
196	☆ Segment 9 - What Matters Next Year, Now (Matt's Segment)	04/20/21	06/30/21	06/30/21	52d	Toby S. Gregory, CMP	Complete
197	☆ Segment Outline Written	04/20/21	05/19/21	05/19/21	22d	Kim Aguirre	Complete
198	☆ Segment Copy Written	05/17/21	06/30/21	06/30/21	33d	Sara Linton	Complete
199	☆ Copy Approval	06/07/21	06/30/21	06/30/21	18d	Matt Feret	Complete
200	☆ VIDEOS/COMMERCIALS	02/03/21	07/15/21	07/15/21	117d		Complete
201	☆ Opening Video	04/01/21	06/30/21	06/30/21	65d	Sara Linton	Complete
202	☆ Diamond Recognition Video	02/03/21	07/12/21	07/01/21	114d		Complete
203	☆ 2021 Diamond Partners to Toby	02/03/21	02/25/21	02/24/21	17d	Clint Goodwin	Complete
204	☆ Diamond Partner list to TA	03/18/21	03/18/21	03/18/21	1d	Toby S. Gregory, CMP	Complete
205	☆ Names and Logos for Video	03/18/21	03/26/21	03/24/21	7d	Toby S. Gregory, CMP	Complete
206	☆ City and States from Clint to Toby	04/07/21	04/15/21	04/08/21	7d	Clint Goodwin	Complete
207	☆ Concept, Storyboard	05/06/21	05/06/21	05/06/21	1d	Diana Hernandez	Complete
208	☆ Approval to The Agency	05/11/21	05/11/21	05/11/21	1d	Toby S. Gregory, CMP	Complete
209	☆ Final Files to Toby	07/08/21	07/08/21	07/06/21	1d	Diana Hernandez	Complete
210	☆ Video files to GWC	07/12/21	07/12/21	07/06/21	1d	Toby S. Gregory, CMP	Complete
211	☆ Front Runner Agent Recognition Video	04/27/21	07/08/21	07/06/21	53d	Sara Linton	Complete
212	☆ List of Front Runners from Kim A.	04/27/21	04/27/21	04/27/21	1d	Kim Aguirre	Complete
213	☆ Rough Draft	04/27/21	07/01/21	06/30/21	48d	Sara Linton	Complete
214	☆ Final Video Due	07/08/21	07/08/21	07/06/21	1d	Sara Linton	Complete
215	☆ Commercials	03/16/21	07/15/21	07/15/21	88d		Complete
216	☆ Teaser for Email	05/10/21	07/15/21	07/15/21	49d	Diana Hernandez	Complete
217	☆ Concept, Storyboard	05/10/21	05/10/21	05/10/21	1d	Diana Hernandez	Complete
218	☆ Approval to The Agency	05/17/21	05/17/21	05/17/21	1d	Toby S. Gregory, CMP	Complete
219	☆ Video done	06/23/21	06/23/21	06/23/21	1d	Diana Hernandez	Complete
220	☆ Video + Email package to Toby	07/14/21	07/14/21	07/13/21	1d	Diana Hernandez	Complete
221	☆ Deploy Video in Email	07/15/21	07/15/21	07/15/21	1d	Toby S. Gregory, CMP	Complete
222	☆ Product Commercials, if any	03/16/21	06/30/21	06/25/21	77d	Toby S. Gregory, CMP	Complete
223	☆ Reach out to Kate Avello and Marci Carlson	03/16/21	03/16/21	03/16/21	1d	Toby S. Gregory, CMP	Complete
224	☆ Reach out to Tim Roach	03/16/21	03/16/21	03/16/21	1d	Toby S. Gregory, CMP	Complete
225	☆ Reach out to Mandy Herbert & Adam Axcell	03/16/21	03/16/21	03/16/21	1d	Toby S. Gregory, CMP	Complete
226	☆ Reach back out to Tim Roach for commercials	06/01/21	06/01/21	06/01/21	1d	Toby S. Gregory, CMP	Complete
227	☆ All commercials are due	03/16/21	06/25/21	06/25/21	74d	Toby S. Gregory, CMP	Complete
228	☆ All commercials need to be approved by Matt and Frankie	06/25/21	06/30/21	06/30/21	4d	Toby S. Gregory, CMP	Complete

Column 15	Task Name	Start	Due	Finish	Duration	Assigned To	Status
229	INTERNAL TRAINING MEETING	04/21/21	06/18/21	06/18/21	43d	Clint Goodwin	Complete
230	Date/Time: Friday, June 18 at 10am CST	06/18/21	06/18/21		1d	Clint Goodwin	Complete
231	Get attendee info from Clint	05/03/21	05/03/21	05/03/21	1d	Clint Goodwin	Complete
232	Create Outlook Calendar Event	05/03/21	05/05/21	05/05/21	3d	Toby S. Gregory, CMP	Complete
233	Set up Hopin/platform	04/21/21	06/14/21	06/14/21	39d	Sara Linton	Complete
234	Hopin Graphics for Internal Training Meeting due	06/11/21	06/11/21	05/11/21	1d	Diana Hernandez	Complete
235	PowerPoint Template	05/14/21	06/01/21	05/18/21	13d	Diana Hernandez	Complete
236	First Round	05/14/21	05/14/21	05/12/21	1d	Diana Hernandez	Complete
237	Final Files to Toby	06/01/21	06/01/21	05/13/21	1d	Diana Hernandez	Complete
238	Files to Clint	06/01/21	06/01/21	05/18/21	1d	Toby S. Gregory, CMP	Complete
239	BINGE BOXES	03/11/21	07/16/21	07/16/21	92d	Toby S. Gregory, CMP	Complete
240	VUTV GUIDE (PRINTED)	03/15/21	06/30/21	06/30/21	78d	Diana Hernandez	Complete
241	Calendar/Planner with new dates and info	04/05/21	04/08/21	04/08/21	4d	Toby S. Gregory, CMP	Complete
242	Speaker's Bios and headshots	04/26/21	04/29/21	04/29/21	4d	Toby S. Gregory, CMP	Complete
243	Contents	03/15/21	05/03/21	06/03/21	36d	Diana Hernandez	Complete
244	Concept, Round One	06/07/21	06/07/21	06/07/21	1d	Diana Hernandez	Complete
245	Approvals to TA	06/09/21	06/09/21	06/09/21	1d	Toby S. Gregory, CMP	Complete
246	Final Design	06/09/21	06/30/21	06/30/21	16d	Diana Hernandez	Complete
247	Select choice of good/better/best box option	03/11/21	03/11/21	03/10/21	1d	Toby S. Gregory, CMP	Complete
248	Project start date for Agency team	03/11/21	03/11/21	03/11/21	1d	Diana Hernandez	Complete
249	Compliance Q&A to Jenn Goodley	03/16/21	04/05/21	04/05/21	15d	Toby S. Gregory, CMP	Complete
250	Client review of box items only	03/11/21	03/31/21	03/31/21	15d	Toby S. Gregory, CMP	Complete
251	Agency needs final approval of items	03/31/21	04/02/21	04/01/21	3d	Toby S. Gregory, CMP	Complete
252	Items routed to Matt/Armando for Approval	04/02/21	04/12/21	04/12/21	7d	Toby S. Gregory, CMP	Complete
253	Client review 1 of box design	04/12/21	05/13/21	05/13/21	24d	Toby S. Gregory, CMP	Complete
254	Provide final QTY's for ordering of contents	05/17/21	05/17/21	05/17/21	1d	Toby S. Gregory, CMP	Complete
255	Client review 2 of box design	04/29/21	05/20/21	05/18/21	16d	Toby S. Gregory, CMP	Complete
256	Routed to Matt/Armando for Approval	05/20/21	05/27/21		6d	Toby S. Gregory, CMP	Complete
257	Final review/approval of box	05/27/21	06/08/21	06/04/21	9d	Toby S. Gregory, CMP	Complete
258	Release box files to procurement	06/08/21	06/14/21	06/14/21	5d	Diana Hernandez	Complete
259	Supply shipping addresses phone numbers	06/14/21	06/30/21	06/30/21	13d	Toby S. Gregory, CMP	Complete
260	Mail Out	07/12/21	07/15/21	07/15/21	4d	Diana Hernandez	Complete
261	In-hand by: 7/16/21	07/12/21	07/16/21	07/16/21	5d	Diana Hernandez	Complete
262	MARKET EVALUATION FORMS	02/24/21	06/11/21	06/10/21	78d		Complete
263	Send last years to Clint for edits	02/24/21	02/24/21	02/24/21	1d	Toby S. Gregory, CMP	Complete
264	Edits are due back from Clint to Toby	02/24/21	03/25/21	03/17/21	22d	Clint Goodwin	Complete
265	edits to The Agency	03/26/21	03/26/21	03/17/21	1d	Toby S. Gregory, CMP	Complete
266	Concepts, First Round	05/19/21	05/19/21	05/20/21	1d	Diana Hernandez	Complete
267	To Clint for approval	05/20/21	05/20/21	05/20/21	1d	Toby S. Gregory, CMP	Complete
268	Final files	06/10/21	06/10/21	06/08/21	1d	Diana Hernandez	Complete
269	PDFs to Clint	06/11/21	06/11/21	06/10/21	1d	Toby S. Gregory, CMP	Complete
270	QUALITY REWARD SHEETS	02/03/21	05/19/21	05/18/21	76d		Complete
271	Ask Clint for Data	02/03/21	02/04/21	02/03/21	2d	Toby S. Gregory, CMP	Complete
272	Diana to get data fields to Clint to sign off on	02/23/21	02/24/21	02/23/21	2d	Diana Hernandez	Complete
273	Clint to sign off on data files for Rewards Shell	02/23/21	04/09/21	04/23/21	34d	Clint Goodwin	Complete
274	Data due back from Clint	02/03/21	04/02/21	04/23/21	43d	Clint Goodwin	Complete
275	Get data to The Agency from Clint	04/05/21	04/23/21	04/23/21	15d	Toby S. Gregory, CMP	Complete
276	Concepts, First Round	03/31/21	04/05/21	04/05/21	4d	Diana Hernandez	Complete
277	To Clint for Approval	05/05/21	05/07/21	05/05/21	3d	Toby S. Gregory, CMP	Complete
278	Clint's edits back to Toby	05/05/21	05/07/21	05/07/21	3d	Clint Goodwin	Complete
279	Route through Legal and Compliance	05/07/21	05/11/21	05/11/21	3d	Toby S. Gregory, CMP	Complete
280	Final approval to The Agency	05/11/21	05/11/21	05/11/21	1d	Toby S. Gregory, CMP	Complete
281	Separate PDFs per Partner to Clint	04/05/21	05/19/21	05/18/21	33d	Diana Hernandez	Complete
282							
283	Cancelled Projects for this year	06/30/21	07/27/21		20d		Cancelled
284	KBYG EMAIL	06/30/21	07/15/21		12d	Kim Murawski	Cancelled
285	Live Stream info to Kim	07/07/21	07/07/21	07/07/21	1d	Toby S. Gregory, CMP	Complete

Column 15	Task Name	Start	Due	Finish	Duration	Assigned To	Status
87	☆ Updated invite list to Kim	07/12/21	07/12/21		1d	Toby S. Gregory, CMP	Cancelled
88	☆ Deploy KBYG Email	07/14/21	07/15/21		2d	Kim Murawski	Cancelled
89	☆ Mobile App (?)						Cancelled
90	☆ Do we really need?						
91	☆ App Data Master (are we doing the app again?)						
92	☆ Big Checks for Diamond Partners (?)						Cancelled
93	☆ Get info from Clint						
94	☆ Info to The Agency						
95	☆ Concepts, First Round						
96	☆ To Clint for Approval						
97	☆ Final prints shipped to Clint?						
98	☆ Mobile App Graphics (?)						Cancelled
99	☆ Specs to The Agency						
100	☆ Concepts, First Round						
101	☆ Approvals to The Agency						
102	☆ Final Files to Toby						
103	☆ Mobile App Graphics to Kim						
104	☆ Pre-Trip Mailer						Cancelled
105	☆ Concepts, First Round						Cancelled
106	☆ Routed to Matt/Armando for Approval						Cancelled
107	☆ Feedback due to The Agency						Cancelled
108	☆ Shipping Addresses to Toby (businesses)						Cancelled
109	☆ Final Design						Cancelled
110	☆ Mail out for in-hand by: March 19						Cancelled
111	☆ Binge Box Thank You insert (maybe)	07/22/21	07/27/21		4d	Diana Hernandez	Cancelled
112	☆ First Round	07/22/21	07/27/21		4d	Diana Hernandez	Cancelled
113	☆ Final Design					Diana Hernandez	Cancelled
114	☆ Final list of shipping addresses	07/22/21	07/22/21		1d	Toby S. Gregory, CMP	Cancelled
115	☆ Shipping Addresses to The Agency	07/23/21	07/23/21		1d	Toby S. Gregory, CMP	Cancelled
116	☆ Mail out for in-hand by: July 30, 2021	07/27/21	07/27/21		1d	Diana Hernandez	Cancelled
117							
118	☆ Event Phase	07/19/21	07/23/21	07/23/21	5d	Toby S. Gregory, CMP	Complete
119	☆ Monday (7/19) - Rehearsal	07/19/21	07/19/21	07/19/21	1d		Complete
120	☆ Tuesday (7/20) - Broadcast	07/20/21	07/20/21	07/20/21	1d		Complete
121	☆ Wednesday (7/21) - Breakouts	07/21/21	07/21/21	07/21/21	1d		Complete
122	☆ Thursday (7/22) - Breakouts	07/22/21	07/22/21	07/22/21	1d		Complete
123	☆ Friday (7/23) - Breakouts (ah hoc meetings)	07/23/21	07/23/21	07/23/21	1d		Cancelled
124							
125	☆ Closing Phase	07/21/21	08/31/21	08/25/21	30d	Toby S. Gregory, CMP	Complete
126	☆ Thank You + Post Event Survey	07/21/21	08/06/21	08/06/21	13d	Toby S. Gregory, CMP	Complete
127	☆ Complete email list of all virtual attendees	07/21/21	07/21/21	07/21/21	1d	Toby S. Gregory, CMP	Complete
128	☆ Deploy Email with Survey	07/26/21	07/26/21	07/26/21	1d	Toby S. Gregory, CMP	Complete
129	☆ Survey progress report	07/30/21	07/30/21	07/30/21	1d	Toby S. Gregory, CMP	Complete
130	☆ Send a reminder email to complete survey (if needed)	08/02/21	08/02/21	07/30/21	1d	Toby S. Gregory, CMP	Complete
131	☆ Capture final survey data & send to Toby	08/05/21	08/05/21	08/05/21	1d	Diana Hernandez	Complete
132	☆ Compile Survey data for summary and program review	08/06/21	08/06/21	08/06/21	1d	Toby S. Gregory, CMP	Complete
133	☆ Hot Wash / Debrief Meeting	07/27/21	07/27/21	07/27/21	1d	Toby S. Gregory, CMP	Complete
134	☆ Schedule for Tuesday, July 27, 2021	07/27/21	07/27/21	07/27/21	1d	Toby S. Gregory, CMP	Complete
135	☆ SWOT Analysis Created	07/27/21	07/27/21	07/27/21	1d	Toby S. Gregory, CMP	Complete
136	☆ Event Summary Meeting					Toby S. Gregory, CMP	Cancelled
137	☆ Schedule for Tuesday, August 10, 2021				1d	Toby S. Gregory, CMP	Cancelled
138	☆ Attendance Statistics				12d	Toby S. Gregory, CMP	Cancelled
139	☆ Participant Statistics				12d	Toby S. Gregory, CMP	Cancelled
140	☆ SWOT Analysis Presented				11d	Toby S. Gregory, CMP	Cancelled
141	☆ Digital Program Notebook Archived	08/31/21	08/31/21	08/25/21	1d	Toby S. Gregory, CMP	Complete
142							
143							
144							

Dashboards

Invitee Statistics

610

Invited

119

Markets Accepted

70%

Accepted

427

Accepted

224

Partners Accepted

17%

Declined

105

Declined

84

CVS Colleagues Accepted

5%

No Response

33

No Response

7%

#No Match

45

#No Match

#No Match means these were added so late that they didn't have time to go through our CVENT registration process.

Note: these were added between July 12-22, 2021.

Task Statistics

285

Completed

285 Total Tasks

14

72 hours+ Late

3

Late

108

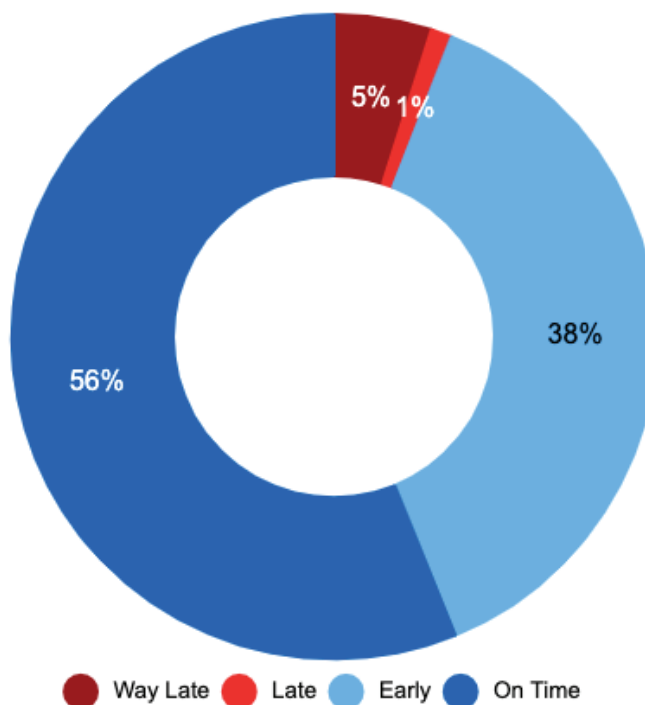
Early

160

On Time

0

In-Progress



National Distribution Partners 2022

Program Report

Post-Event S.W.O.T. Analysis

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Creative/collateral	<ul style="list-style-type: none"> well-thought concept 	<ul style="list-style-type: none"> box item felt chincy/cheap 	<ul style="list-style-type: none"> having AC/DC invloved in Producer meetings mood boards before concepts 	<ul style="list-style-type: none"> too much of "Matt Feret" on everything
Quality of Content		<ul style="list-style-type: none"> cheap box items 	<ul style="list-style-type: none"> more content, less fluff more meaningful value 	
Dissemination of Communication	<ul style="list-style-type: none"> clear instructions 	<ul style="list-style-type: none"> weren't communicated past E&C 	<ul style="list-style-type: none"> a lot of emails from different sources. Using the same naming convention to call out Aetna Medicare Events vs GSevents. create a new E&C email that people can begin to recognize 	
Hopin	<ul style="list-style-type: none"> everything in one place 	<ul style="list-style-type: none"> CVS VPN Limitations limited number of A/V participants 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> User errors and limitations
User Experience		<ul style="list-style-type: none"> virtual meetings Hopin is not conversational 	<ul style="list-style-type: none"> needs to be in-person scaled down 2-day conference 	<ul style="list-style-type: none"> travel ban
Breakouts				
Registration	<ul style="list-style-type: none"> Smartsheet late add form 	<ul style="list-style-type: none"> still too manual for late adds having to be pre-registered 	<ul style="list-style-type: none"> more streamlined process one point of contact for ALL invitees 	<ul style="list-style-type: none"> compliance and legal
Market Leaders	<ul style="list-style-type: none"> some Markets went perfectly 	<ul style="list-style-type: none"> not paying attention or taking full advantage of the test event site 	<ul style="list-style-type: none"> more in-depth training checking Partner connectivity 	<ul style="list-style-type: none"> encouraging people to jump ship and create their own meetings
United Front (Team AETNA)		<ul style="list-style-type: none"> being divided and divisive 	<ul style="list-style-type: none"> emphay and understanding contingency planning 	<ul style="list-style-type: none"> pressure from the Markets

HITS: • well-produced late night show

MISSES: • quality of product in box

PAINPOINTS: • Omar Johnson's contract
 • Legal and Compliance involvement in breakout attendees
 • CVS legal/compliance not allowing us to send what we can send

COMMENTS: "Love Matt, just wish we were getting actual info."

National Distribution Partners 2022

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Link to Final Videos

Videos have been uploaded to

Box.com > 2021 Events & Conferences > NDP21 > Final Show Files

NDP21 - Sizzl Reel

<https://aetna.box.com/s/emmuvosq7bjv2oqvluibmtbrz8a0oi9m>

NDP21 - Broker Show

<https://aetna.box.com/s/k15qt87k6v82jkld2fmv9qe1a63i5zb8>

NDP21 - Agent Show

<https://aetna.box.com/s/c1cbs9xm6xsmyge30t7b2s6cp0wy7qf4>

***National
Distribution
Partners
2022***

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presents:

NEXT YEAR NOW

WITH MATT FERET

ONLY ON
VU TV
A NATIONAL
DISTRIBUTION
PARTNERS
NETWORK

National Distribution Partners 2022

Program Report • Aug 2021