

SEQUEL

Digital Experience

(Workbook, tab 9, Q: 1, 2, 3)

PREPARED FOR SAP RFP: DIGITAL EXPERIENCE WORK EXAMPLES

Digital Experience Case Studies & Portfolio

The following cases demonstrate our approach to building cohesive user experiences that solve business objectives and provide users with the value they are looking for. Our solutions always stem from a brand-focused, user-centered, strategic point of view that guides all our creative and technical decisions, from creative ideation all the way to through development.

All the cases involve an examination of the brand strategy. In some cases, that means creating a net-new brand, in others it's a refinement of what already exists.

The visual design samples shown are similarly broad, ranging from net-new brand identity and systems to the evolution of existing brand elements that need to become more of a digital brand toolkit to work best across all devices and media channels.



Inspiring Confidence, Driving Action

PROUD MOMENTS CASE STUDY

How do you attract new parents and inspire them to take the next step in their journey?

Demonstrate how you
create lasting impact in
the lives of children and
families you serve.

We started with stakeholder and parent interviews to identify business imperatives, personas, and user needs.

Who the Site Is For

Primary Audiences

- Prospective Parents
- Prospective BCBA Employees
- Referral Sources
- Prospective BT Employees

Secondary Audiences

- Referring Physicians
- Special Needs Orgs
- Potential Acquisition Business

Tertiary Audiences

- Insurers
- Funders
- Current Parents
- Current Employees

What Do We Want to Reflect on the Site?

- Strong sense of community and personal relationships (employees and parents)
- The fact you have resources and sophistication of a big organization with the community feel of a mom-and-pop – best of both worlds
- Employees go above and beyond in putting the child and family first – and supporting parents
- The organization's deep expertise and clinical leadership support clinicians and families
- It's accessible: to many budgets, schedules, cultures, types of families and kids
- Every kid is unique!

Additional Considerations

- Promote expertise via thought leadership highlighting relationships to academia and cutting-edge methods – the new ABA
- Include aspirational messages of what your kid can accomplish, without overselling
- Do not convey Proud Moments as vocational or educational help – it's medical
- We want to share clients' stories but must consider privacy and ethical issues

Proud Moments Prospective Parent Profiles

Profile	Mom in Transition  Stephanie	The Switcher  Rabba	Late Bloomer  Lynda	Feeling Helpless  Alma
Summary	Her 3-year-old son is aging out of early intervention services, and she doesn't know what services are available to him now – but she needs them to be affordable. She doesn't know a lot about autism or ABA, and her son doesn't have an official diagnosis.	Her 8-year-old daughter has been working with an ABA practitioner at another agency, but she hasn't been happy with the quality of care. She has very little time to spend doing research. They need someone who is sensitive to her Muslim culture.	Her son is 12 years old and is more typically functioning. He is struggling socially in middle school and has begun to be bullied at school. At home, he has some behavioral and hygiene issues. Lynda has been growing increasingly frustrated with her inability to help her son.	She has a 6-year-old who is nonverbal and on the "lower end" of the autism spectrum. She is feeling helpless about her child's behavior and communication. She isn't sure if change is even possible. She needs guidance and support.
Key Characteristics	• Feels overwhelmed/frustrated • W • D • B • D • N	• More cautious • W • D • B • D • N	• W • D • B • D • N	• W • D • B • D • N

Mom in Transition: Stephanie

Stephanie's 3-year-old son is aging out of the 20–30 hours of early intervention services he was receiving, and she doesn't know what services are available to him now. She values the one-on-one attention he got with EI but can't afford to take on a lot of additional costs in place of the free services. She doesn't know a lot about autism or ABA, and her son doesn't have an official diagnosis. She's not even sure if he's really autistic, and is very overwhelmed.

Key Characteristics:

- Feels overwhelmed and scared about her son's condition
- Does not have an official diagnosis for her son
- Wants continuity of one-on-one care
- Is on a budget and needs a very affordable option
- Doesn't know what's out there for her son
- Needs a lot of support and help with being a mom to an autistic son

Big Questions:

- Is ABA the right approach for my son?
- Will my son get enough individualized care?
- Will this cost me a lot of money?
- Will this be too intensive for my son or family?
- Is my child going to get better?

"What do I need to do?"



We then evaluated competitors and best-in-class websites to inform our UX principles and recommendations.

Sites We Reviewed

Competitors

- Acorn Health
- Alpine Learning Group
- Autism Learning Partners
- Aveanna
- Blue Sprig
- Caravel Autism
- Center for Autism
- Centria
- Kadiant
- NECC
- Neurability
- Trumpet
- Verbal Behavior

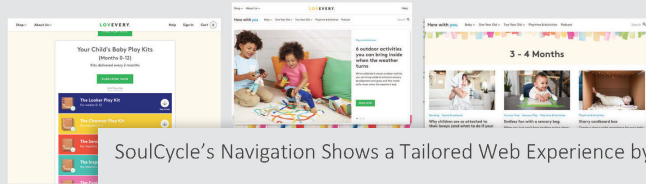
Out-of-Market Sites

- Better Help
- Child Mind Institute
- Equinox
- Growing Up NYC
- Lovevery
- Orange Theory

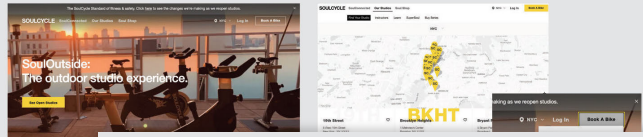
Our Recommendations

1. Focus and clarify the primary message of the website for your users
2. Prioritize parents' needs and the majority of other audience needs will follow
3. Demonstrate your deep experience and expertise to enrich the primary message
4. Build content and strategies that promote trust with all parents
5. Promote local offerings and community with dedicated location pages
6. Enable users to find local offerings
7. Build a strong community

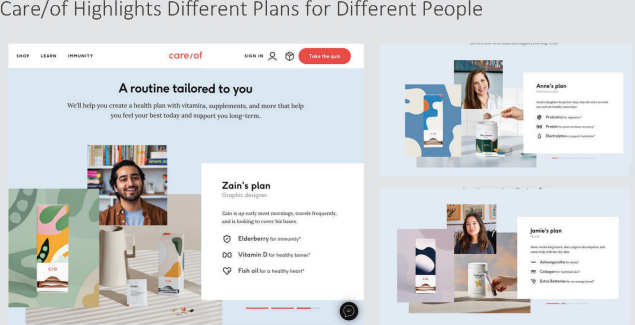
Lovevery's Content Strategy Aligns with and Supports Their Product Strategy



SoulCycle's Navigation Shows a Tailored Web Experience by Location



Care/of Highlights Different Plans for Different People



Recommendation 2

Prioritize parents' needs and the majority of other audience needs will follow

Why it matters

- All audiences want to know that, first and foremost, Proud Moments is serving families well

How we get there

- Most parent needs are shared by other audiences
- Some key content additions and sections for audience-specific content will address most other needs

Conducted a work session with the core team to map user tasks and find the best way for users to move through the funnel.

User Story Mapping Process

We mapped user tasks in a workshop with key Proud Moments stakeholders and then organized them by user type.



70 Proud Moments Discovery Findings & Recommendations | 11.24.20

Key User Tasks – Major Categories of Tasks



71 Proud Moments Discovery Findings & Recommendations | 11.24.20

Key User Tasks: Learn about Proud Moments' Perspective & Approach



74 Proud Moments Discovery Findings & Recommendations | 11.24.20

Key User Tasks: See Proud Moments Offerings



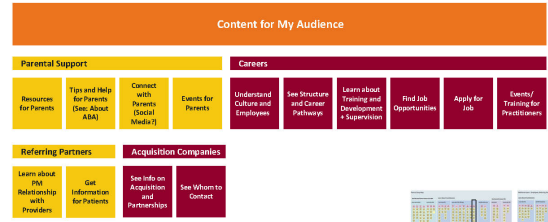
75 Proud Moments Discovery Findings & Recommendations | 11.24.20

Key User Tasks: Get Educated about Autism and ABA



72 Proud Moments Discovery Findings & Recommendations | 11.24.20

Key User Tasks: Get Content for My Audience



76 Proud Moments Discovery Findings & Recommendations | 11.24.20

We modernized their brand signature to be more digital-first.

Original



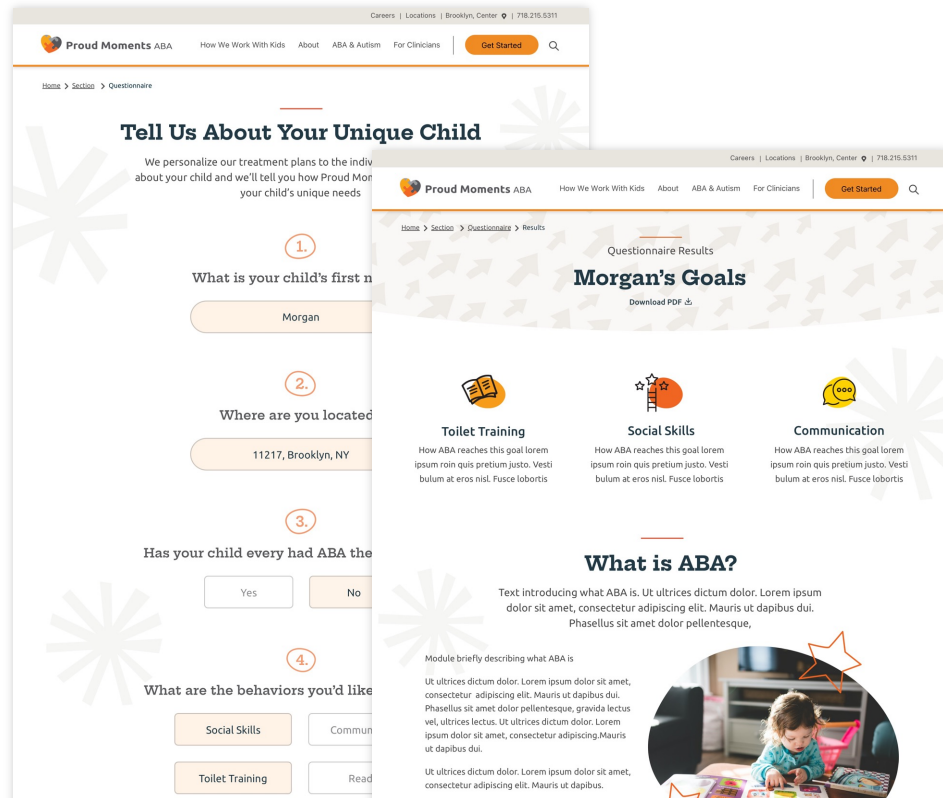
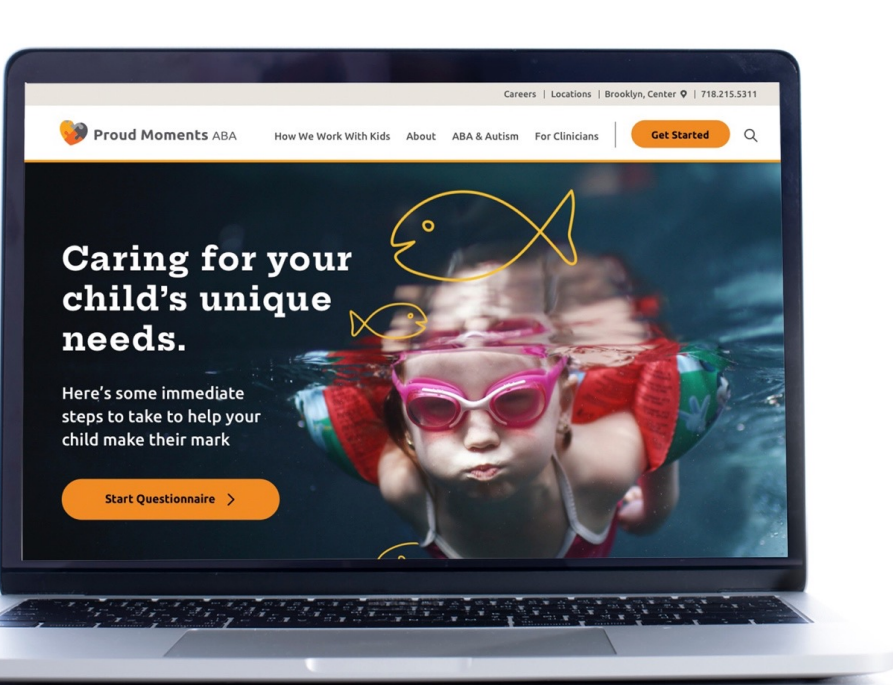
Refreshed



Signage



Our research with parents led us to a creative solution that guided site visitors through a conversation that allowed us to deliver a personalized experience showing parents what possible outcomes could look like.



The site was SEO-optimized to take advantage of localized and information-based user searches.

Careers | Find a Location

Proud Moments ABA

How We Work With Kids

ABA & Autism

For Clinicians

About

Get Started

Home > ABA and Autism

ABA and Autism

An autism diagnosis can be an overwhelming experience—and ABA therapy is a powerful tool to help your child succeed while effecting a positive change in family dynamics.

About Autism

Autism Spectrum Disorder (ASD) is a broad term used to describe a group of neurodevelopmental disorders. Children with ASD possess a complex condition that affects brain development and can create difficulty with social interaction, verbal and nonverbal communication, and emotional control.

Many children with ASD learn and react differently than typically developing children. Each child possesses their own unique set of challenges, skills and strengths. Each has a particular way of processing, socializing and behaving. This results in each one having a unique, individualized disorder. While no cure has been found for autism, early treatment and intervention have proven to have a profound impact on many children's growth and development.

At Proud Moments, we apply the scientifically proven and data-driven discipline of ABA therapy to create meaningful changes in important behaviors.



About ABA

Careers | Locations | Brooklyn, Center | 718.215.5311

Proud Moments ABA

How We Work With Kids

About

ABA & Autism

For Clinicians

Get Started

Home > Section > ABA & Autism Perspectives

ABA & Autism Perspectives

Featured Post

COVID-19 Health and Safety Protocols

Short description of the blog post content on holiday tips for parents with Autistic kids, with a link to the blog post detail page. Lorem ipsum dolor sit amet. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu.

Read More >

Audience

Topic

Type

Newest to oldest

Reset

Blog

Title Goes Here Lorem Ipsum Dolor Sit Amet

Mauris ut dapibus dui. Phasellus sit amet dolor pellentesque, gravida lectus vel, ultrices lectus.

Read More >

Blog

Title Goes Here Lorem Ipsum Dolor Sit Amet

Mauris ut dapibus dui. Phasellus sit amet dolor pellentesque, gravida lectus vel, ultrices lectus.

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Blog

Title Goes Here Lorem Ipsum Dolor Sit Amet

Mauris ut dapibus dui. Phasellus sit amet dolor pellentesque, gravida lectus vel, ultrices lectus.

Read More >

Careers | Find a Location

Proud Moments ABA

How We Work With Kids

ABA & Autism

For Clinicians

About

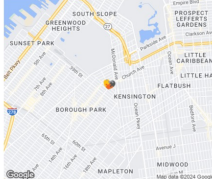
Get Started

Home > Locations > Brooklyn, NY

Brooklyn

Services

In-Home ABA Therapy for Autism



Location Details: Brooklyn, NY

3611 14th Avenue

Suite 341

Brooklyn, NY 11218

United States

Directions

718-215-5311

Send an email

Open Hours:

Mon-Fri: 9am-5pm

Sat-Sun: Closed

Director:

Shaunae Davis

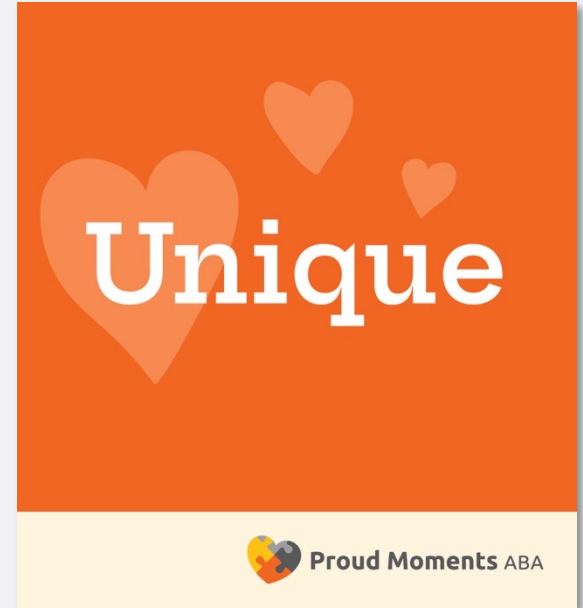
The providers and staff at the Brooklyn location put our families first. Our dedicated administrative team and clinicians take pride in providing a comprehensive ABA service that always has the child's best interest in mind. We accept most major commercial insurances and marketplace CHP plans, allowing excellent care access.

We not only serve our clients but also work with many local advocacy organizations, not for profits, and schools to provide training and informational sessions for the staff and parents.

We specialize in helping children younger than school age (2-6) progress towards their individual goals through intensive in-home aha behavior therapy programs. This can also benefit older children depending on their individual needs.



A social media campaign was developed to mark the launch of the new site.



Creating a More Patient-centric Healthcare Communications Experience

REDCARD

With today's communication complexities in managing personal and family healthcare, how can mobile technology disrupt the paradigm?

By addressing the pain points and embracing the opportunities to delight and surprise the member — and make the payers' look good doing it.

We began with user interviews to identify frustrations and opportunities.

JOCX [K-42N] 4 of 6

Resident
744 OFFICE PARKWAY
ST. LOUIS MO 63141

MEMBER ID:
CD0342

Forwarding Service Requested

CHRIS SAMPLE
1234 SAMPLE ROAD
ST. LOUIS MO 63141

NO

Explanation of Benefits

**THIS IS NOT A BILL
YOUR MEMBER INFO**

Name: CHRIS SAMPLE
ID NO. P00368259-01

Group Number: CD0492
Processed Date: 05/12/18

CONTACT US

Member Services: 419-555-5555
Toll Free: 1-800-555-5555
Mail: 744 Office Parkway
St. Louis MO 63141
Member Portal: PlayerPortal.com

TAIL

I like
even
know
t."

ANCE

Claim # 18042404214

Provider: SIMPLE HOSPITAL

Diagnostics Code(s)	Billed Charges	Allowed Amount	Denied	Deductible	Coinc.	Copyr.	Plan Paid	Remark Codes
S92XA	\$387.00	\$232.20	\$0.00	\$232.20	\$0.00	\$0.00	\$0.00	07 80
S92XA	\$411.00	\$246.60	\$0.00	\$154.85	\$18.35	\$0.00	\$73.40	07 82 80
Claim totals:		\$798.00	\$478.80	\$0.00	\$387.05	\$18.35	\$0.00	\$73.40

You are responsible for this amount

\$405.40

	Annu al Limit	Ammount Accumulated	Ammount Remaining
Tiers 1 & 2)	\$3,000.00	\$3,000.00	\$0.00
Out of Pocket Maximum (In Network, Tier 1)	\$6,000.00	\$3,345.68	\$2,654.32
	Annu al Limit	Ammount Accumulated	Ammount Remaining
Deductible (in & Out of Network, Tiers 1 & 2)	\$6,000.00	\$3,000.00	\$3,000.00
Out of Pocket Maximum (In Network, Tier 1)	\$12,000.00	\$3,345.68	\$8,654.32

Explanation of Benefits

“It feels like a bill, even though I know it’s not.”

– Josh

Procedure Code(s)	
Codes	Messages
73562	RADEX KNEE 3 VIEWS
99283	EMER DEPT MODERATE SEVERITY
Diagnosis Code(s)	
Codes	Messages
S8392XA	SPRAIN UNSPECIFIED SITE LT KNEE INITIAL ENC/NTR
Remark Code(s)	
Codes	Messages
07	THE PROVIDER HAS AGREED TO ACCEPT THE "TOTAL PAYABLE BY MEMBER" PLUS THE AMOUNT OF THE PAYOR AS PAYMENT IN FULL FOR THIS SERVICE. YOU ARE RESPONSIBLE ONLY FOR THE "TOTAL PAYABLE BY MEMBER" SECTION.
80	YOUR CONTRACT HAS A DEDUCTIBLE THIS DEDUCTIBLE MUST BE MET BEFORE PAYMENT IS MADE. THE AMOUNT IN THE DEDUCTIBLE COLUMN HAS BEEN APPLIED TOWARDS YOUR CLAIM. YOU ARE RESPONSIBLE FOR THIS AMOUNT.
82	YOUR CONTRACT REQUIRES THAT A 20% COINSURANCE BE TAKEN ON COVERED EXPENSES. YOUR COINSURANCE MAXIMUM HAS BEEN MET. THE AMOUNT IN THE COINSURANCE COLUMN HAS BEEN APPLIED TOWARDS YOUR COINSURANCE MAXIMUM.
Please Note	
ASKING FOR REVIEW OF DENIED CLAIMS (ADVERSE BENEFIT DETERMINATION INFORMATION) IS THE FIRST STEP OF YOUR CLAIM WAS NOT PAID, YOU OR SOMEONE YOU APPROVE MAY: 1) ASK FOR YOUR CLAIM TO BE REVIEWED AGAIN. THIS IS CALLED AN INTERNAL APPEAL. 2) ASK TO SEE OUR RECORDS ABOUT YOUR CLAIM DURING OFFICE HOURS. 3) ASK FOR A FREE COPY OF THEM. 3) SEND YOUR COMMENTS OR OTHER INFORMATION TO BE PART OF OUR REVIEW. YOU NEED TO ASK FOR THESE BY WRITING TO MEMBER SERVICES APPEALS. YOUR REQUEST MUST BE RECEIVED BY PAYMENTUM BY THE DEADLINE SHOWN IN YOUR PLAN DOCUMENTS. PLEASE SEE YOUR MEMBER HANDBOOK/CERTIFICATE, ANNUAL NOTICE OF COVERAGE OR SUMMARY PLAN DESCRIPTION TO LEARN MORE. HEALTH CARE REFORM LAWS REQUIRE US TO SHARE INFORMATION WITH YOU. THIS FORM LETS YOU KNOW WHAT YOUR DOCTOR OR HEALTH CARE PROVIDER RECENTLY SENT TO US. THIS INCLUDES: 1) THE DATE YOU RECEIVED THE HEALTH CARE. 2) THE NAME OF THE PROVIDER WHO GAVE THE CARE. 3) HOW MUCH THE MEDICAL CARE COST. 4) WHY YOU HAD TO HAVE THE MEDICAL CARE. 5) WHAT PROCEDURE YOU HAD DONE. IF YOU HAVE ANY QUESTIONS, PLEASE CALL YOUR DOCTOR OR YOUR HEALTH CARE PROVIDER.	
Reporting Fraud: How can I help?	
INSURANCE FRAUD CAN SIGNIFICANTLY INCREASES THE COST OF HEALTH CARE. IF YOU HAVE QUESTIONS WHETHER THESE SERVICES OR ITEMS WERE RECEIVED, PLEASE CONTACT THE MEMBER SERVICES DEPARTMENT. 1-800-555-5555. OR CALL THE NAME OF THE PROVIDER WHO GAVE THE CARE. 3) HOW MUCH THE MEDICAL CARE COST. 4) WHY YOU HAD TO HAVE THE MEDICAL CARE. 5) WHAT PROCEDURE YOU HAD DONE. IF YOU HAVE ANY QUESTIONS, PLEASE CALL YOUR DOCTOR OR YOUR HEALTH CARE PROVIDER.	
Member Responsibility	
Amounts in the deductible, co-insurance and co-pay columns represent the member's responsibility. If the member's cost requires a deductible and/or co-insurance be taken on covered expenses until their deductible and/or co-insurance have been met, the amounts appearing in these columns will be applied towards the member's benefit maximum.	
Did you know?	
PayerPortal.com is available 24/7. You can self-register to access your personal portal to check claims, view and so more. You can even choose to opt out of receiving your EOBs by mailou can even choose to opt receiving your EOBs by mail. Check it out today at: PayerPortal.com.	

Explanation of Benefits

“[ALL CAPS]
feels as though
I’m being
yelled at.”

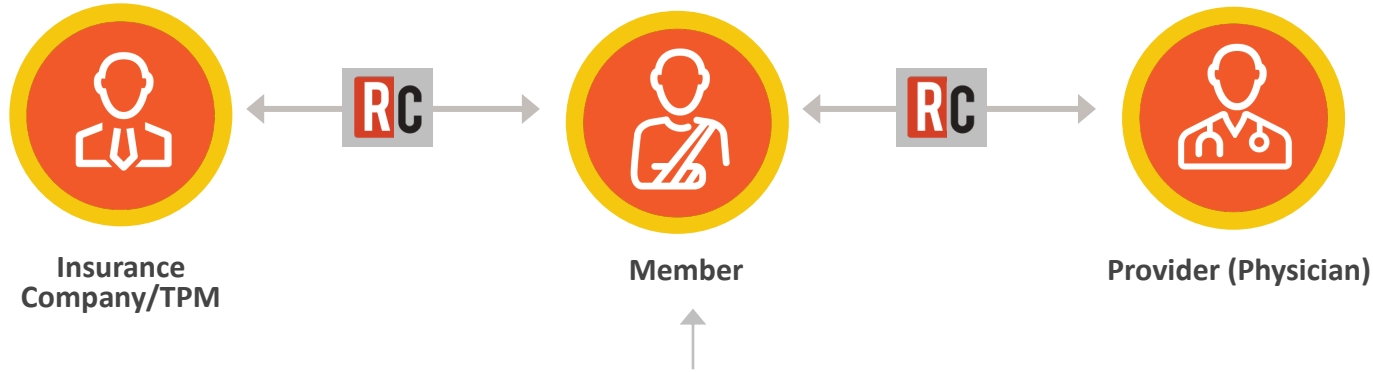
– Greta

“This is
all doctor-
speak.”

– Derick

And ensured strategic alignment between business and product goals.

The RedCard App (NewApp) could go beyond the B2B healthcare communications partner, becoming a member-centric tool for end consumers and **the go-to resource before, during and after receiving healthcare services for value-add content.**



Empowering members throughout the healthcare journey:

What providers are in-network, well-regarded and convenient for me?

When my health plan changes, can my healthcare track record be all in one place?

What will the service cost me? What other financial planning options are there?

We evaluated possible business models that would drive the role of brand...

OPTION A

Aetna

Powered by RedCard

CLOSER-IN

(white-label, ingredient)

NewApp is setting a new industry standard for simplifying digital healthcare communications in order to create better efficiencies, increase visibility and eliminate the fear of the unknown for all.

OPTION B

NewApp

Brought to you by Aetna

EXTENSION

(endorsed, B2B2C)

NewApp helps members simplify their changing healthcare considerations and health history and helps health insurance companies deliver a more member-centric, digital experience.

OPTION C

NewApp

REACH

(freestanding, B2C)

NewApp is an objective third party redefining the way people manage their healthcare finance and record-keeping by empowering consumers to take control of their health history and to provide insights to make better healthcare decisions in the future.

... resulting in a DTC brand story that gave RedCard a clear direction.

Fortifi empowers people to take control of their healthcare finances and health through an engaging, frictionless and member-centric experience.

Members get a clear view that prioritizes what they owe and why, clearly and instantaneously. And with value-added features, Fortifi helps them make better decisions before, during and after each visit to a provider.

Payers gain a transformative level of paperless, digital efficiency and something even more valuable: satisfied and self-sufficient members who enjoy managing their healthcare journey.

Fortifi. “My healthcare, in my hands.”

We built personas to align the research with the user's context and needs.



Simon
Family Juggler

"I feel overwhelmed by trying to manage the healthcare finances of my family."

The Family Juggler: Simon

Needs	Pain Points	How Can We Help?
Keep track of family expenses and costs	Track the burden of having to do everything "myself"	Do it for them: proactive monitoring of coverage, deductibles, costs
Help manage family history	Organizational help and help saving time	Provide family management and tracking of expenses
Keep track and do things quickly, "don't get it done"	Proactive help monitoring healthcare "add ons before it's too late"	Offer contextual guidance on how to save money
Cost money whenever possible	Uncompensated costs can be frustrating	Provide financial incentives and discounts - e.g. "split bill if pay this app"
Cost need the big picture - "what do I owe?"	Help planning for future events	Proactive alerts about premiums being coded incorrectly
Assistance in understanding his plan	"I'm overwhelmed and can't find anything"	Offer guidance on payment plans with no interest
Don't trust the healthcare company	Don't plan change frequently, doesn't have robust history	Provide access to family medical records
Confused about how his plan works, seems to have changed	Don't plan change frequently, doesn't have robust history	Help him understand when his plan has changed
Help him understand how to get the most out of his insurance company	Don't plan change frequently, doesn't have robust history	Offer guidance on payment plans with no interest

94 Qualitative One-on-One Research Findings | 11.15.2018

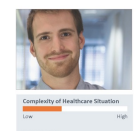
SEQUEL



Elizabeth
Independent Self-Actualizer

"I wanted a healthcare plan that matches my values, and I created one."

Diligent Organizer: Frasier



Key Differentiators:

- Has a generally proactive personality
- Brings professional skillset to everything he does
- Organized and does as much research as possible
- Always seeking new ways to be more efficient

Biggest Value Proposition:

- Help me be more efficient in my current process of tracking and monitoring.

While he wouldn't call himself an expert at understanding his health insurance, and he still often has questions, he feels confident that he is well equipped to read and understand EOBs and doctors' bills, and to make sure that everything lines up. He receives EOBs by paper out of habit, but he recognizes that receiving them electronically would be easier and would allow him to search his archive more easily. Paying online is likewise preferable to him, because of the digital record, but security and using a legitimate service is a top concern. He reads his EOBs as soon as they come, because he feels it's necessary for keeping "good hygiene" for his health insurance - kind of like checking credit card bills or bank statements regularly. He believes you need to protect your health insurance finances in the same way you protect your credit - by being vigilant - and would be interested in a service that helps him in doing that more easily.

Complexity of Healthcare Situation
Low High

Engagement
Passive Active

Reactivity
Reactive Proactive

Level of Organization
Disorganized Organized

Understanding of Health Plan
Low High

Digital Usage
Low High

99 Qualitative One-on-One Research Findings | 11.15.2018

SEQUEL



Irene
Chronic-Care Manager

"My healthcare needs are chronic and complex, so dealing with healthcare providers is part of my daily life."

The Avoider: Reese



Key Differentiators

- Doesn't engage with her health insurance or doctors often
- Generally healthy
- Has few health issues
- Is passive about her health - "doesn't know what she doesn't know"
- Insurance plan has been the same for many years

Biggest Value Proposition:

- Incentivize me to get more involved in my healthcare and to overcome some of my barriers to digital usage.

Reese has had the same health insurance company and plan for a long time, which has built a sense of trust that her coverage and health insurance meet her needs. As she is generally healthy and doesn't have any chronic conditions, she goes to the doctor only when absolutely necessary (one time a year for an annual checkup).

Due to her general good health and sense of trust in her health insurance, Reese is quite passive and reactive when it comes to her healthcare; she rarely opens EOBs, as she expects that things "work on their own." Due to this passive nature, she not only misses mistakes on her EOBs or bills, but she also doesn't realize that mistakes can happen - she "doesn't know what she doesn't know." She recognizes that if she did develop a more complicated health condition, she would be unprepared for how to handle or deal with more complicated coverage. Additionally, because she's been in the same system for years, she has always gotten paper statements, and while she realizes that electronic statements probably make more sense, she doesn't feel inclined to change a system that has worked for her for so long. She's open to an electronic system, but she would need to understand why it would benefit her to fix something that "ain't broken."

Complexity of Healthcare Situation
Low High

Engagement
Passive Active

Reactivity
Reactive Proactive

Level of Organization
Disorganized Organized

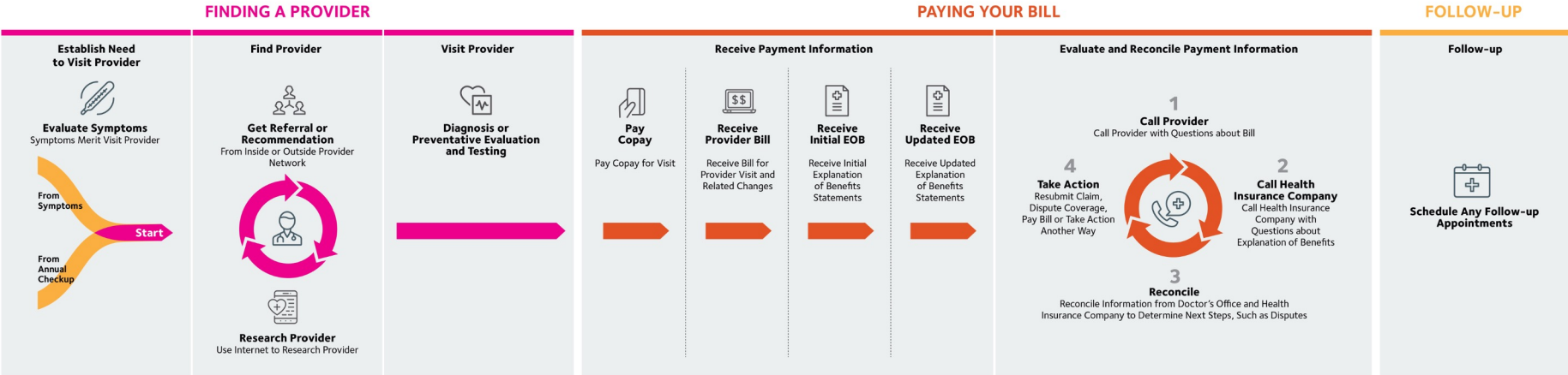
Understanding of Health Plan
Low High

Digital Usage
Low High

102 Qualitative One-on-One Research Findings | 11.15.2018

SEQUEL

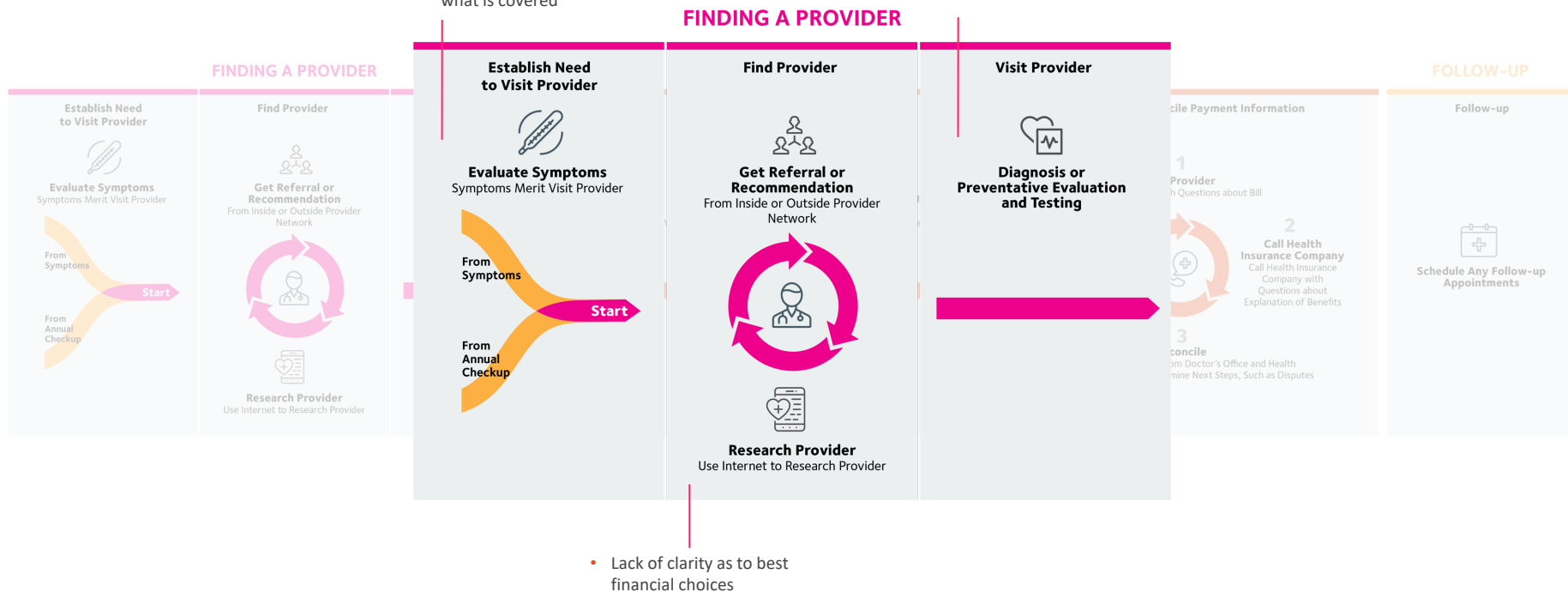
And created a user journey to highlight the moments that matter.



The journey allowed us to clearly see user's pain points...

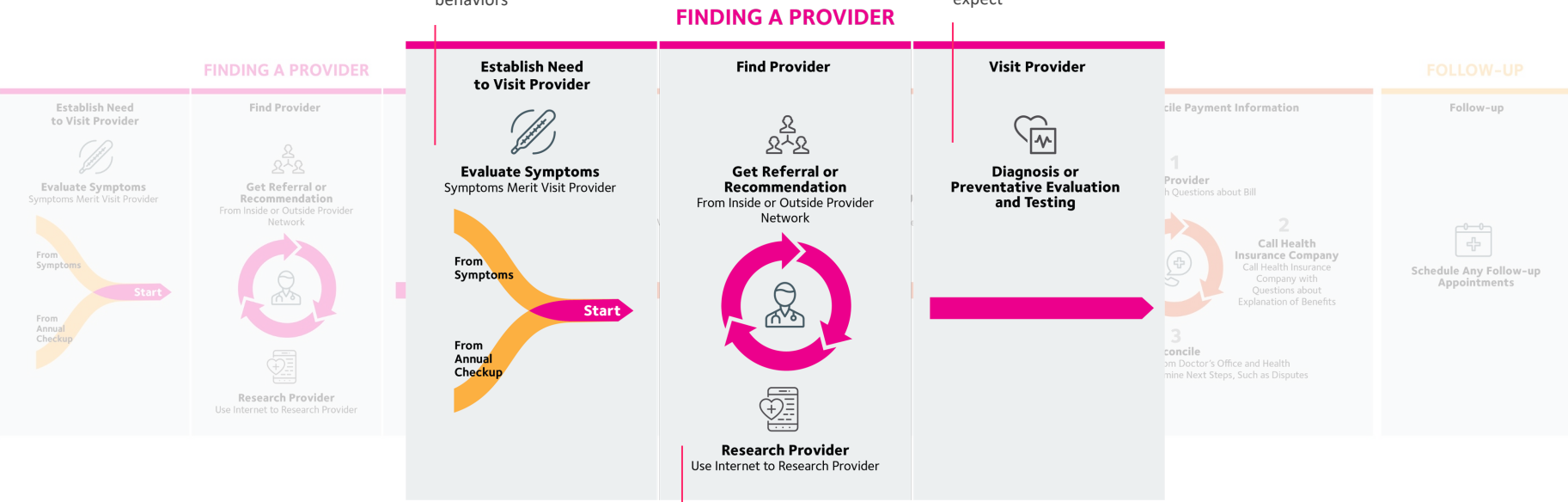
- Doesn't know what an unusual need will cost relative to plan
- Confusion about plan and what is covered

- No easy access to medical history
- Lack of understanding of what it will cost



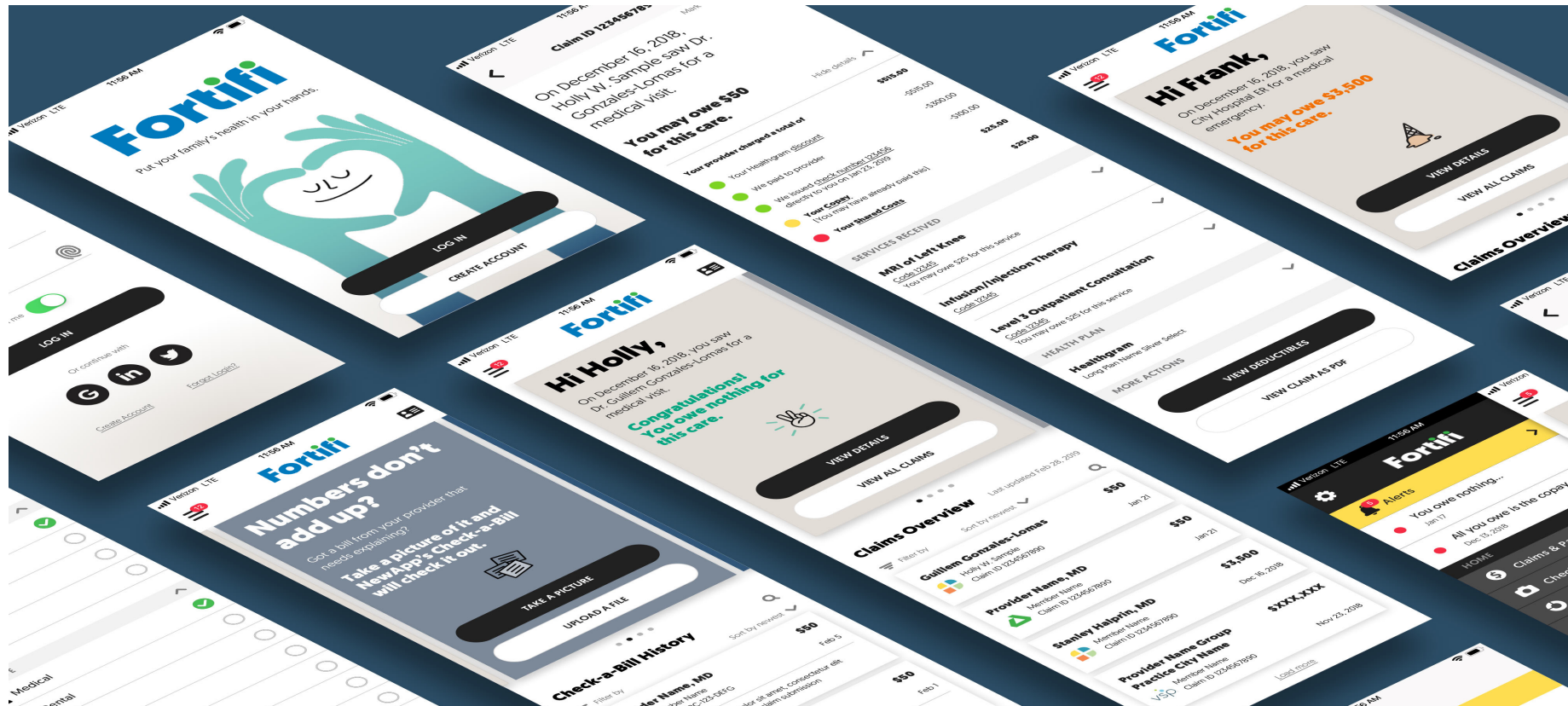
... and identify high-priority opportunities.

- Help calculate or anticipate costs accurately up front
- Recommend the best plans for members based on their behaviors
- Help members understand what to expect

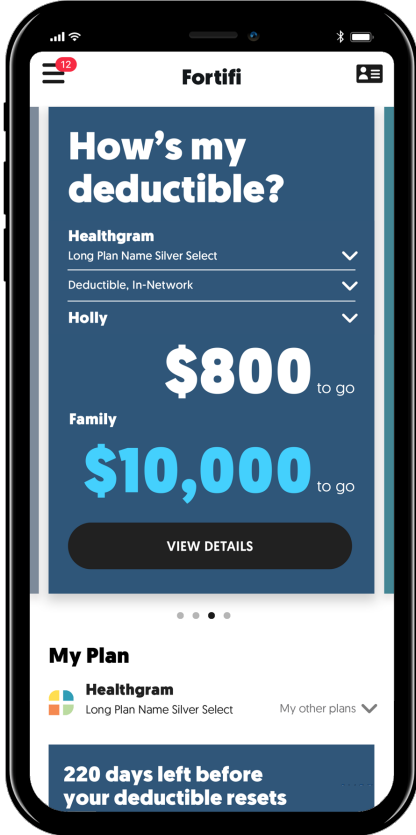
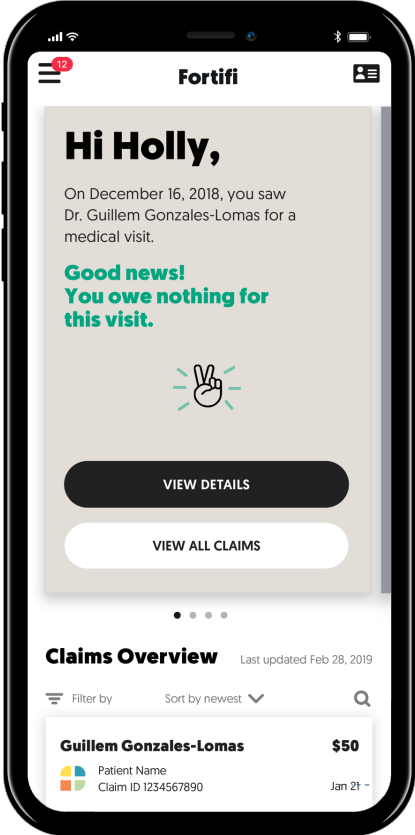


- Provide healthcare management and history
- Offer family management
- Help members make better financial choices

We then designed and built an experience around those opportunities.



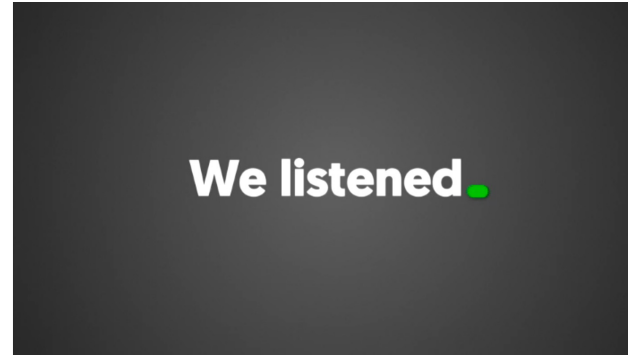
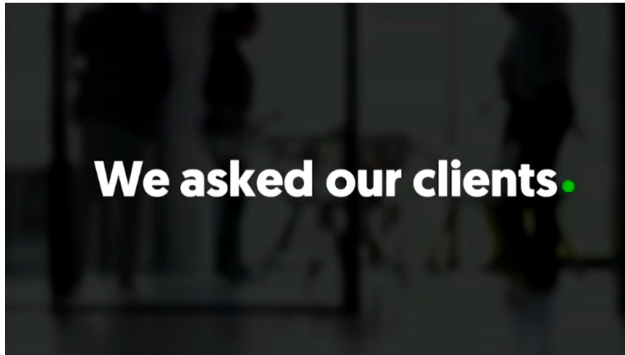
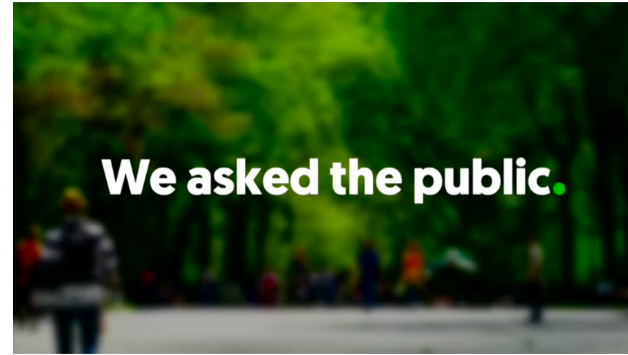
The app required deep collaboration with RedCard to build the functionality.



The Fortifi brand extended across all touchpoints; internally and externally



We also scripted, shot, and produced a brand purpose video series.



Seeing the Unseen

FIRST EAGLE CASE STUDY

How does one of the world's largest asset manager ensure an accurate and engaging web experience for a global audience?

By building a flexible, secure, customizable CMS that enables them to easily meet the ever-changing demands of the international markets.

Key Takeaways

- With over 13 indicators and more than 100 data points, the GreenSource Building Index is the most comprehensive and detailed national tool for assessing the energy, water, and waste performance of commercial buildings. The index is designed to help building owners and managers understand the energy, water, and waste performance of their buildings and to identify areas for improvement.
- The index is designed to be a practical tool for building owners and managers. It is easy to use and provides a clear picture of a building's performance. The index is also designed to be a tool for benchmarking and for setting goals.
- The index is designed to be a tool for improving building performance. It provides a clear picture of a building's performance and identifies areas for improvement. The index is also designed to be a tool for setting goals and for tracking progress.

Number of buildings in the GreenSource Building Index

Year	Number of buildings
2009	487
2010	615
2011	625
2012	635
2013	645
2014	655
2015	665
2016	675
2017	685
2018	695
2019	1,079
2020	1,087

2019-2020 Edition

For the GreenSource Building Index, see www.greensource.org

The image consists of four square panels arranged horizontally, each with a different background color and a photograph of a person. Above each panel is a title in white text. Below each panel is a short paragraph in white text.

- Financial Professionals >** (Blue background): A man in a white shirt and tie is on a phone call, looking slightly to the side.
- Individual Investors >** (Green background): A woman is looking down, possibly at a document or a screen.
- Institutional Investors & Investment Consultants >** (Red background): A man is resting his chin on his hand, looking thoughtfully at the camera.
- Sponsors and Companies Seeking Capital >** (Purple background): A woman with blonde hair is looking down, possibly at a document or a screen.

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Medicare Resource Guide

Questions to Consider When Making Medicare Coverage Decisions

- 1. **What are my Medicare options?**
 - Medicare is a federal health insurance program for people 65 and older. It is made up of four parts: Part A (hospital insurance), Part B (medical insurance), Part C (Medicare Advantage plans), and Part D (prescription drug coverage).
 - You can choose to enroll in one or more of these parts, depending on your needs and budget.
 - You can also choose to delay enrollment in Part B and Part D if you are currently covered by a private health insurance plan or a Medicaid plan.
- 2. **What is the Social Security Administration (SSA)?**
 - The SSA is the federal agency that administers Social Security, Medicare, and Medicaid.
 - You can contact the SSA for more information about Medicare and to help you enroll in Medicare.
- 3. **What is a Medicare Advantage plan?**
 - A Medicare Advantage plan is a private health insurance plan that provides all the benefits of Medicare Part A and Part B, plus additional benefits such as vision, dental, and hearing.
 - These plans are offered by private insurance companies approved by Medicare.
 - You can choose to enroll in a Medicare Advantage plan instead of Original Medicare (Parts A and B).
- 4. **What is a Medicare Supplement plan?**
 - A Medicare Supplement plan, also known as Medigap, is a private health insurance plan that helps pay for some of the costs that Original Medicare does not cover, such as copayments, coinsurance, and deductibles.
 - These plans are sold by private insurance companies approved by Medicare.
 - You can choose to enroll in a Medicare Supplement plan along with Original Medicare (Parts A and B).
- 5. **What is a Medicare Prescription Drug Plan?**
 - A Medicare Prescription Drug Plan, also known as Part D, is a private health insurance plan that helps pay for the cost of prescription drugs.
 - These plans are sold by private insurance companies approved by Medicare.
 - You can choose to enroll in a Medicare Prescription Drug Plan along with Original Medicare (Parts A and B) or a Medicare Advantage plan.

Considerations

- **Cost:** Medicare Advantage plans often have lower premiums than Original Medicare, but they may have higher out-of-pocket costs. Medicare Supplement plans have higher premiums but lower out-of-pocket costs. Medicare Prescription Drug Plans have monthly premiums.
- **Coverage:** Medicare Advantage plans may offer additional benefits like vision, dental, and hearing. Medicare Supplement plans cover the same benefits as Original Medicare. Medicare Prescription Drug Plans cover prescription drugs.
- **Flexibility:** Medicare Advantage plans often have network restrictions and prior authorization requirements. Medicare Supplement plans allow you to see any doctor that accepts Medicare. Medicare Prescription Drug Plans allow you to use any pharmacy that accepts Medicare.



Investors



40k Investment Merit Hope for the Best, Pr...

Preparing for retirement requires the most systematic of planning: research. And the most important research is to understand the market you are investing in. The US market is a global market, and it is a market that is growing. The US market is a global market, and it is a market that is growing. The US market is a global market, and it is a market that is growing.

The global equity market has had an average growth rate of 10% over the past decade, and after a shock in 2020 it is forecast to return to growth through 2030 as an additional benefit for those people who sell the high yielding equi...

While the demand for US stock may fall in the near future, it is likely that the demand for US stock will remain strong in the long term.

Global Resilience for the Equity Industry

Investment in Europe and other regions continues to grow, and the US market is a global market, and it is a market that is growing. The US market is a global market, and it is a market that is growing. The US market is a global market, and it is a market that is growing.

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Power of Resilience

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While the demand for US stock may fall in the near future, it is likely that the demand for US stock will remain strong in the long term.

The top section of the slide features the GLE logo in the upper left corner, consisting of the letters 'GLE' in a large, bold, sans-serif font, with 'globalventures' in a smaller, lowercase font directly beneath it. To the right of the logo, the text 'Shifting Value from Valuation' is displayed in a large, bold, sans-serif font. Below this, the text 'Global Fund' appears in a smaller, bold, sans-serif font. In the upper right corner, the date 'September 30, 2010' is written in a small, sans-serif font. The background of this section is a solid dark blue. Below the text, there is a large, stylized graphic of a globe. The globe is composed of a white grid of latitude and longitude lines. A camera lens, showing its internal elements and a red mark, is positioned as if it is looking through the globe, with a cityscape visible through the lens's viewfinder.

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FIRST EAGLE
INVESTMENT MANAGEMENT

FIRST EAGLE
FUND

Investment Management

www.firsteaglefund.com

Intangible Assets in Value Investing: Statistically Significant

The performance of value strategies in recent years has been more impressive than the traditional dogma of unprofitable value markets in a wide range of long-term studies, even after factoring in the costs of trading. At the same time, the challenges of identifying and measuring intangible assets in a value strategy have led for the median investor to the conclusion that value investing is less than the summation of the many advantages on the financial statement. The challenges of identifying and measuring intangible assets in a value strategy have led for the median investor to the conclusion that value investing is less than the summation of the many advantages on the financial statement. The challenges of identifying and measuring intangible assets in a value strategy have led for the median investor to the conclusion that value investing is less than the summation of the many advantages on the financial statement. The challenges of identifying and measuring intangible assets in a value strategy have led for the median investor to the conclusion that value investing is less than the summation of the many advantages on the financial statement.

Key Takeaways

- Value investing has outperformed other strategies over the long term, but the performance gap has narrowed in recent years.
- The ongoing research on the value of intangible assets has shown that value investing is more profitable than other strategies, but the performance gap has narrowed in recent years.
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Facing Your Fears

Early studies have revealed that the most common fears in children range from the relatively innocuous (e.g., 90% of children report being scared of snakes) to much less likely (e.g., 10% of children report being scared of spiders).

While the fear of snakes is of no immediate medical concern, the fear of spiders is an widespread phobia that can be debilitating. In some cases, even phobias considered to be the purest expression of anxiety and the source of phobic disorder can be life-threatening.

It is not the fear itself, however, that is the cause of the phobia; the phobia that often has the most pernicious effects results from the way the child reacts to the fear. The child's response to the fear is what is important. When facing the fear, the child's reaction is to suppress, to suppress, to suppress. The child's reaction is to suppress, to suppress, to suppress. The child's reaction is to suppress, to suppress, to suppress.

With a highly skilled therapist, however, exposure and fear can be overcome, the phobic response can be eliminated. The first step is to identify the fear. The child's reaction is to suppress, to suppress, to suppress. The child's reaction is to suppress, to suppress, to suppress. The child's reaction is to suppress, to suppress, to suppress.

Source: *Journal of the American Academy of Child and Adolescent Psychiatry*, 2004, 43(10), 1200-1208.

[illegible]

FIRST EAGLE INVESTMENT MANAGEMENT

The Value of Downside Protection

FIRST EAGLE INVESTMENT MANAGEMENT

The Value of Downside Protection

Realization
The First Eagle High Yield Fund attempts to use the prominent improvement in credit spreads to generate a return that exceeds the performance of the benchmark. The fund is not designed to protect the client from negative performance.

Risk to Return Snapshot (1/1/2015-1/1/2017)

Source: Morningstar Strategic

The chart shows the risk to return for the High Yield Fund and the Benchmark. The High Yield Fund has a higher risk to return than the Benchmark, which is consistent with the fund's objective to generate a return that exceeds the performance of the benchmark. The chart also shows that the High Yield Fund has a higher risk to return than the Benchmark, which is consistent with the fund's objective to generate a return that exceeds the performance of the benchmark.

Returns have been annualized with regard to CDS and CDS mapping, and 30-Day, 60-day and 90-day returns. The chart shows the risk to return for the High Yield Fund and the Benchmark. The High Yield Fund has a higher risk to return than the Benchmark, which is consistent with the fund's objective to generate a return that exceeds the performance of the benchmark.

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So, we started by building a clear articulation of the brand story...

Seeing the Unseen

At First Eagle, we bring our clients a distinct perspective. One focused entirely on serving as prudent stewards of their capital over the long term. Fundamentally, we believe bottom-up research can help uncover compelling opportunities across global markets.

Our disciplined, unconventional thinking owes little to the consensus. We instead rely on in-house research and original thought, by products of an investment-led culture that led us to wherever opportunity lies — often in misunderstood or out-of-favor securities and industries.

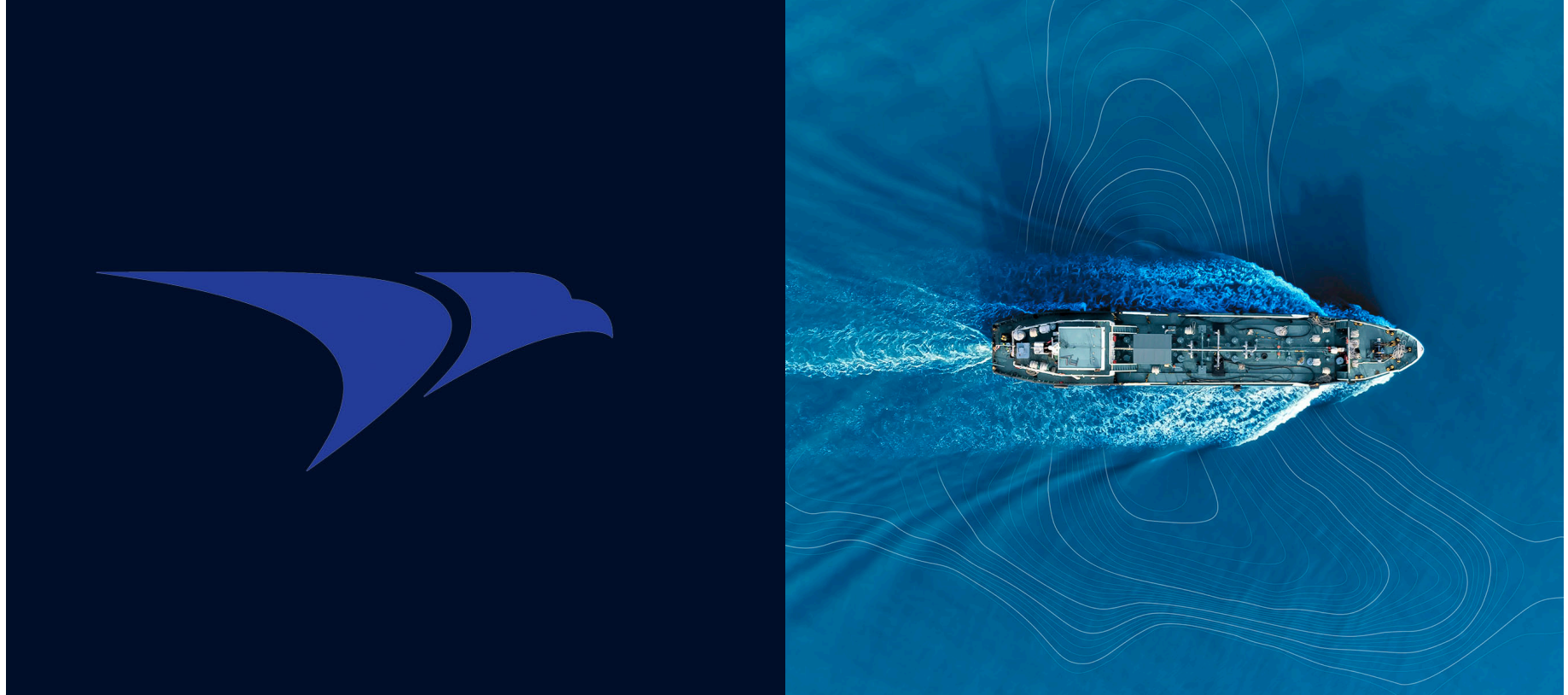
Clients come first, always. This commitment serves as a unifying source of clarity in an often-ambiguous investment landscape.

We are First Eagle Investments. And we see clearly.

... and modernized the logo with custom typography and symbol enhancements to make it more digital-forward.



The core idea of seeing the unseen drove the creative solution.



From branded sales collateral...



At First Eagle, we bring our clients a distinct perspective. One focused entirely on serving as prudent stewards of their capital over the long term — a mission deeply rooted in our rich heritage dating back to 1864.

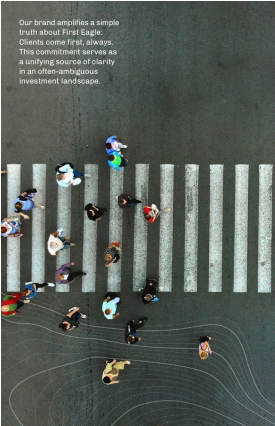


Our unique vantage point helps us to discern the obscured in our pursuit of attractive long-term outcomes through highly selective, deeply analytical investment strategies.

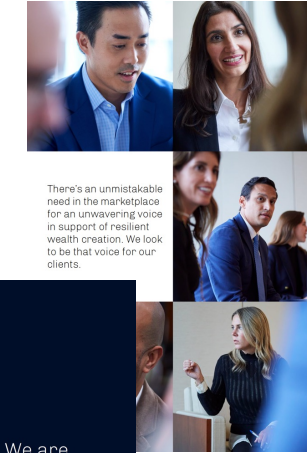
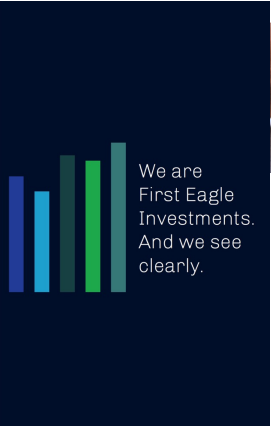


Our disciplined, unconventional thinking owes little to the consensus. We instead rely on in-house research and original thought, byproducts of

an investment-led culture that lead us to wherever opportunity lies — often in misunderstood or out-of-favor securities and industries.



Our brand amplifies a simple truth about First Eagle: Clients come first, always. This commitment serves as a unifying source of clarity in an often-ambiguous investment landscape.

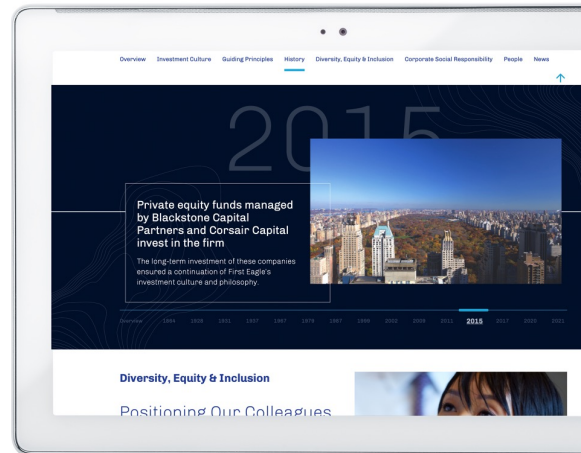
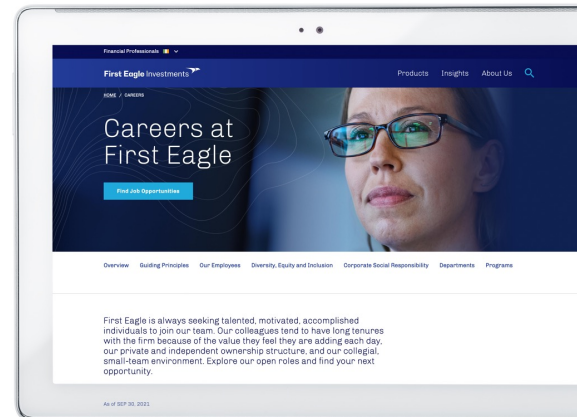
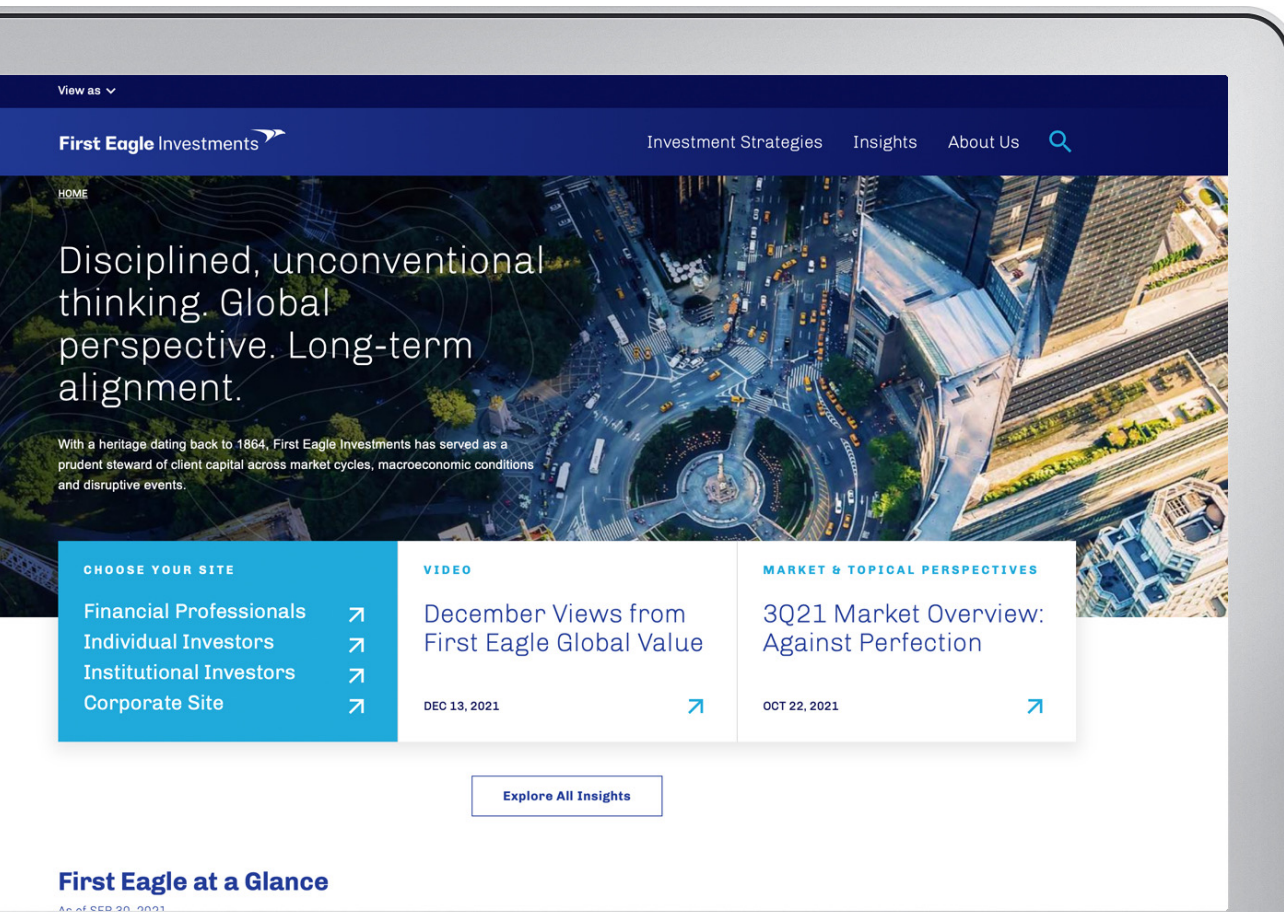


There's an unmistakable need in the marketplace for an unwavering voice in support of resilient wealth creation. We look to be that voice for our clients.

... to a video/motion toolkit for ongoing campaigns.



The new website required a complete rebuild on a customized Drupal CMS.



Our process began by building a plan, interviewing stakeholders and reviewing competitors to find the opportunity space.

Methodology

Our discovery process included the following:

- 14 Stakeholder Interviews
- Background and Materials Review
- Existing Site Review
- Competitive Review
- Workshop: User Journey
- SEO Evaluation

Competitors We Reviewed

Retail	Institutional	Alternate Credit	Other
- Invesco - Royce Investment Partners - Alger - AMG Fund - Vanguard	- Invesco - Acadian Asset Management	- Ares Capital Group - Bain Capital - Golub Capital	- AB - AQR - BlackRock

Stakeholder Interviews

Who We Interviewed:

Fund Operations	Ed Molina
Investment Management	Debbie Lusman
Retail Team	Keith Kisto, Sam Hutchins, Mark Totten
Alternative Credit	Lauren Vieira, Mike Herrig
Administration/Executive	
Institutional Team	
Marketing	
Human Resources	
Product	
Legal & Compliance	
International Wholes	
Finance	
Retirement	
National Accounts	

How can we create a journey that deepens the client's relationship with First Eagle?

Journey and Tasks

17 First Eagle Discovery Findings & Recommendations | 02 30 2023

SEO Audit – Overview

Competitive Review – Retail

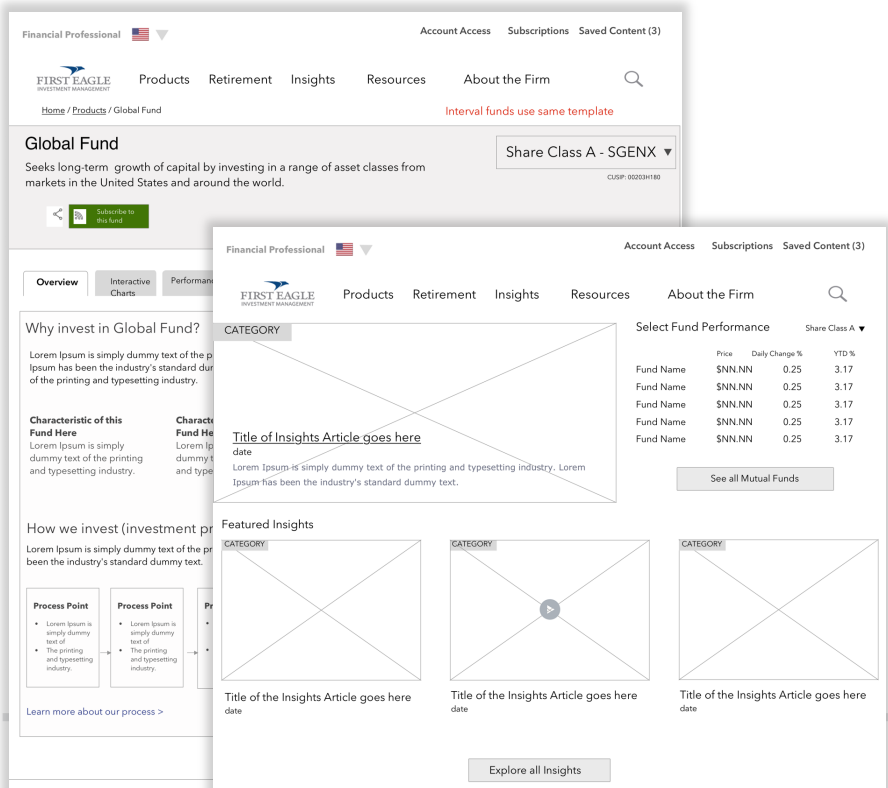
Competitive Review – Institutional

Competitive Review – Alternative Credit

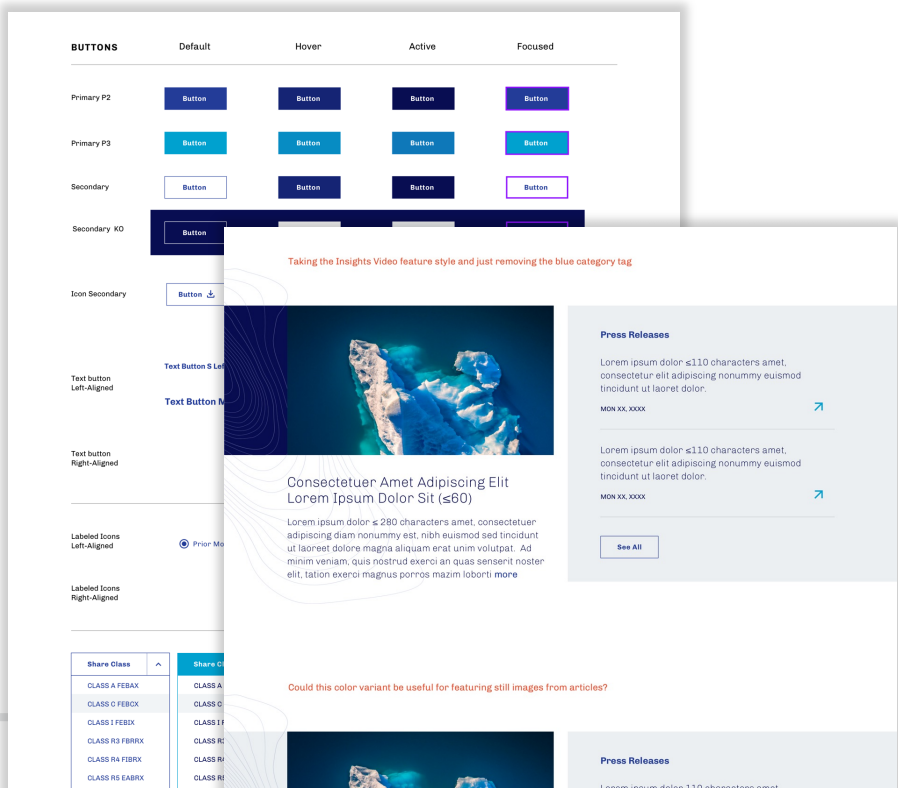
9 First Eagle Competitive Review Work Session | 12 10 2023

We aligned on website requirements, communicated functionality with wireframes, and built a comprehensive design system.

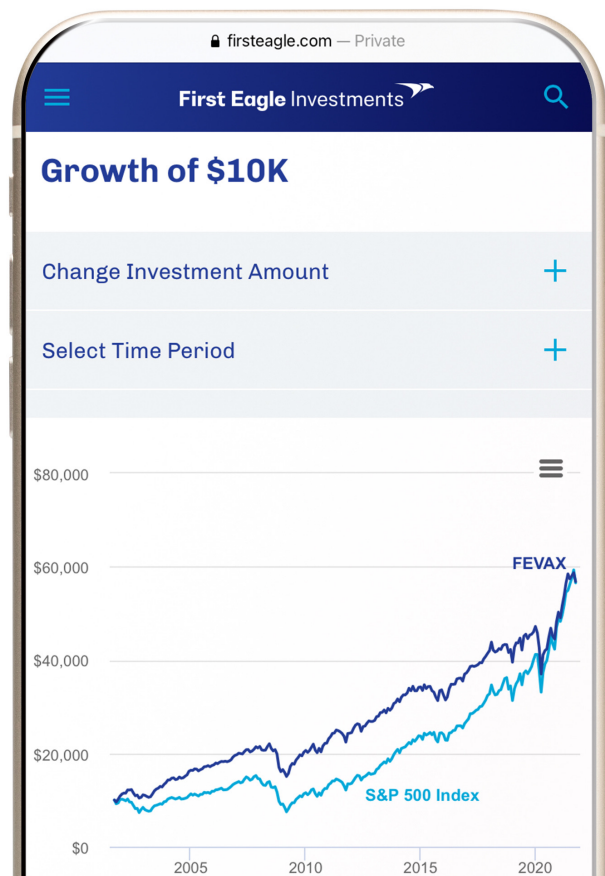
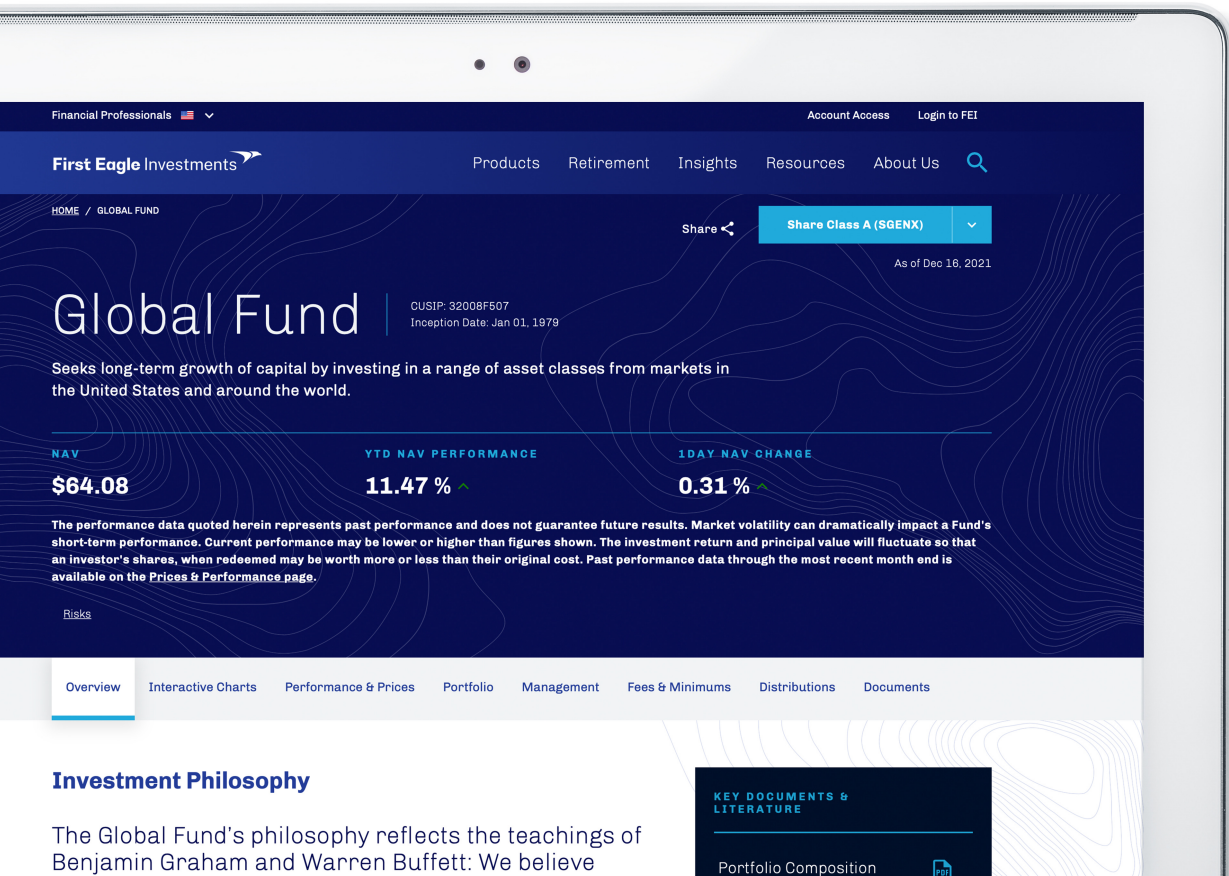
Wireframes



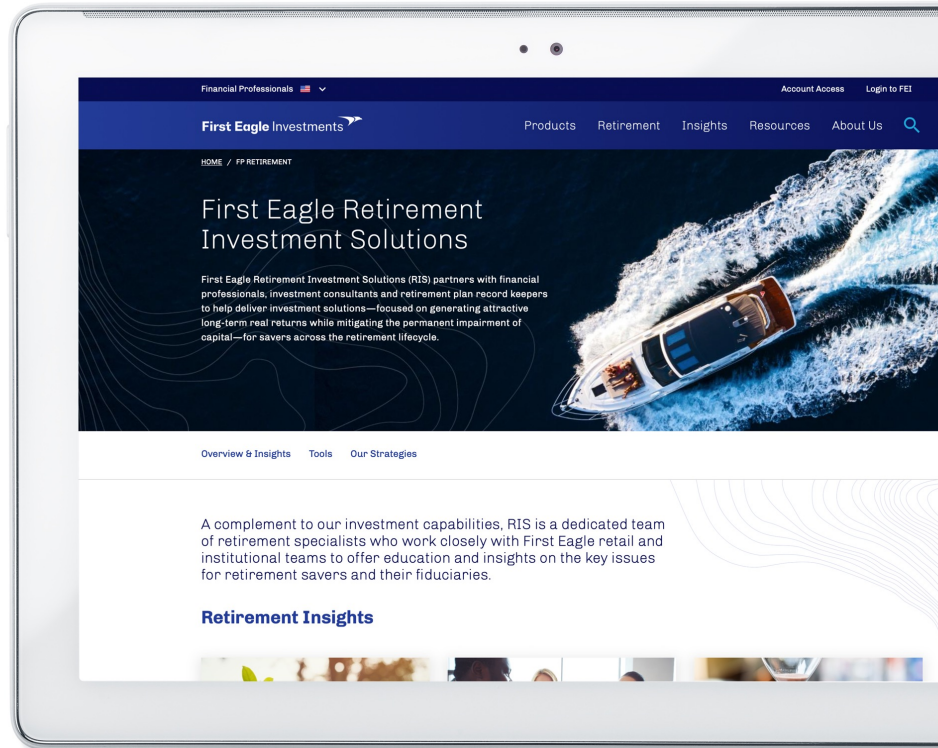
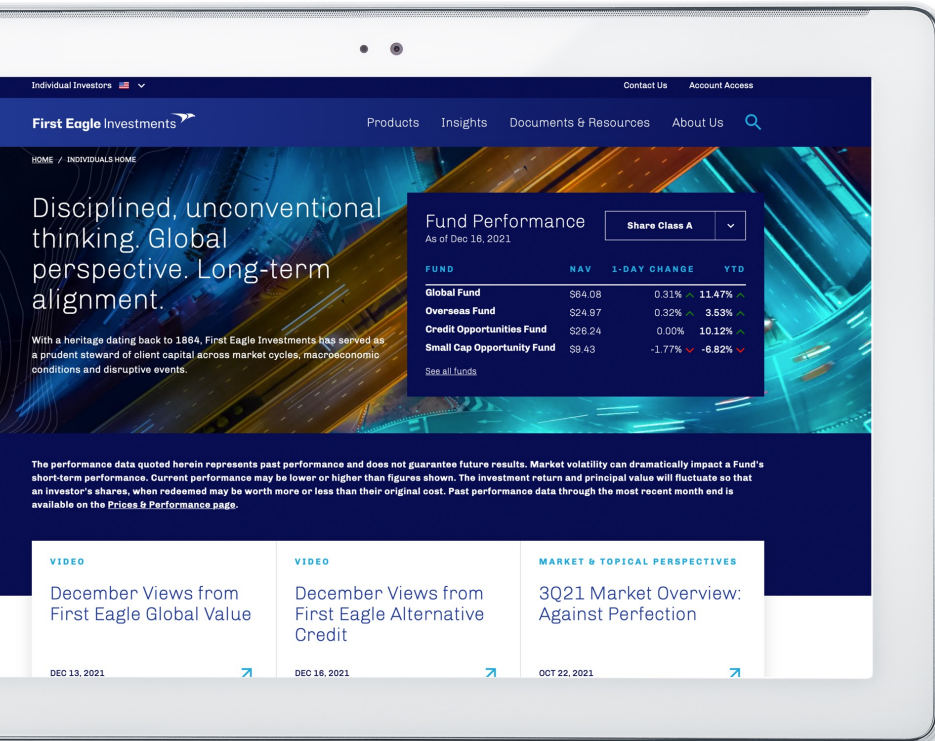
Design System



Custom handlers in the CMS allowed First Eagle to easily update fund information with existing workflow infrastructure.



Customized content permissions allows First Eagle to control which global users could see which pages; all the way through the on-page copy.





Building Brand-to-Business Impact: From Narrative to Lead Generation Results

QUIET PLATFORMS

The Challenge

A unit of American Eagle Outfitters recently merged with another supply chain add-on; Quiet Platforms needed to raise awareness of the new combined enterprise.

The lack of awareness in the market was negatively impacting the sales pipeline. With a lofty revenue target for upcoming year, they needed a unified brand narrative and more accounts, i.e., leads, for their sales team to pursue.

In short, how do you take a new narrative and connect the dots to the messages that matter with prospective customers?

The Solution

Upon the development and launch of a new Quiet Platforms brand narrative and digital presence, we developed a performance marketing strategy that delivered a cross-channel media campaign with highly compelling creative that told the new brand story but also invited users to download a high-value white paper in exchange for a quick-form request.

The campaign was directed at two different high-level targets that focused on an account-based-marketing (ABM) approach as well as unknown prospective accounts that fell outside of the ABM list.

The target audiences were further segmented by company size (revenue) and job function to enable personalized messages that spoke to the major-use case and needs of each member of the decision committee.

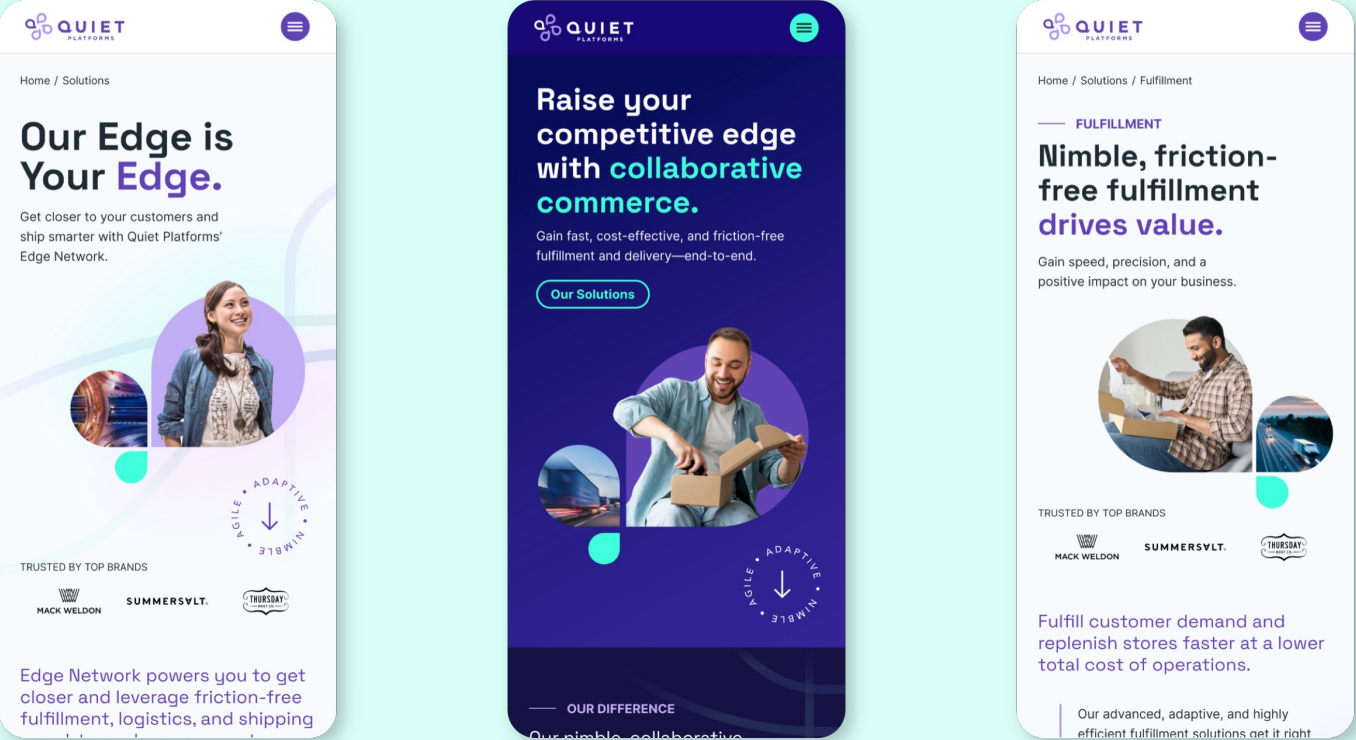
We started with refreshing the brand foundation; from platform through visual identity toolkit.



... Leading with a design concept — “Connected Commerce” — that gave the visual language a clear intent and purpose.



We then designed and developed a website experience based on the new VIBE.



- ✓ Strategically position your inventory for a competitive advantage.
- ✓ End-to-End eCommerce and Omni-Channel Fulfillment
- ✓ Powered by Advanced Logistics and Inventory Data Science
- ✓ Multi-Node In-Market Footprint

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— FULFILLMENT AS A SERVICE

Nimble, friction-free fulfillment drives value.

Gain speed and precision to grow your business more profitably.



TRUSTED BY

Fulfill customer demand and replenish stores faster at a lower total cost of operations.



— CLIENT STORY

See how American Eagle Outfitters used our edge network solution to fly high and revolutionize how their products get where they need to be.



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Our Edge is Your Edge.

Get closer to your customers and ship smarter with Quiet Platforms' edge network.



TRUSTED BY



Quiet's edge network powers you to get closer



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Gain the edge with our collaborative commerce network.

Protect your business with cost-effective, fast, and friction-free fulfillment and delivery—end-to-end.

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— DIGITAL SERVICES

Easily adapt in evolving environments.

Let's work together to take your brand into the future.

TRUSTED BY



We're in the business of quietly minding your network so you can focus on your customer, helping you evolve where it matters. Our

A History of Exceeding Expectations



2009

- Founded by Bruce Wally and Michael Johnson, and headquartered in Deerfield, MA
- Launched Boston from first unit shipped
- Scaled US Growth through network growth, necessitating a separate facility

2018

- First client split fulfillment across two nodes within the Network
- 65% annual sales growth since inception



2020

- Sixth facility opened in Chicago, IL
- AEO split fulfillment across 3 nodes within the Network
- Seventh facility opened in Jacksonville, FL

2022

- Ninth facility opened in Atlanta, GA
- 22% of Clients have Multi-Node In-Network Footprint
- Launched Quiet Delivery Network
- Launch of ETC fulfillment direct from Asia

2017

- Third facility opened in Hazelwood, MO

2019

- Fourth facility opened across the Network, third in the Deerfield, MA campus
- Fifth facility opened in LaPlante, CA



2021

- Eighth facility opened in Dallas, TX, and the first built from the ground up

2023

- Continuing to expand end-to-end supply chain capabilities



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Experts at enabling brands to achieve their



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Faster Delivery = More Sales and Satisfaction

Consumers love speed. You know that getting closer to your customers is imperative for commercial success.



Holistic Freight = End-to-End Efficiencies

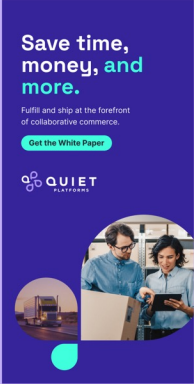
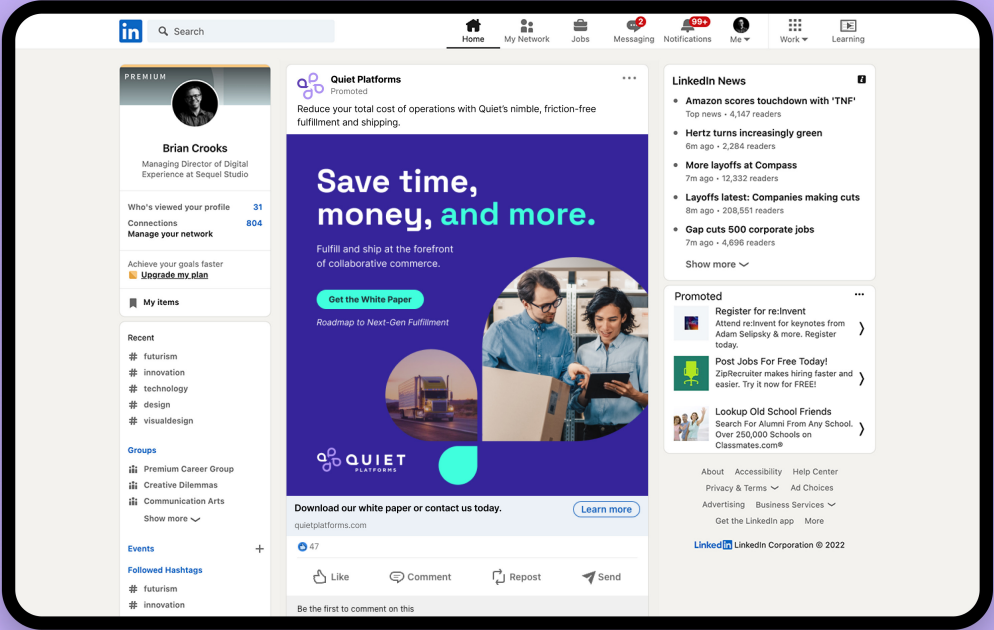
Shorter transport yields direct savings while also reducing costs such as tracking and insurance, plus it minimizes bottlenecks and secondary customer service issues.



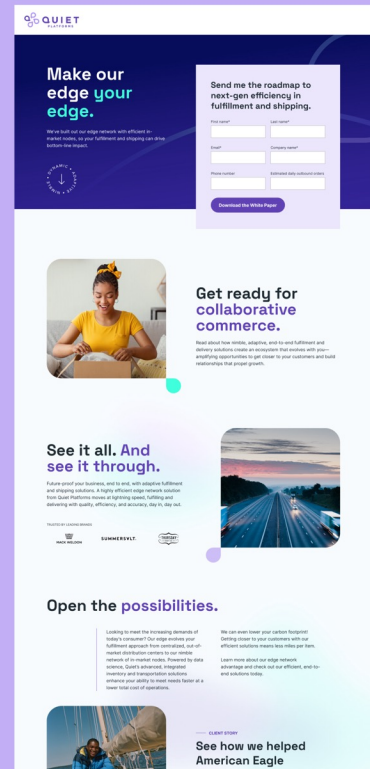
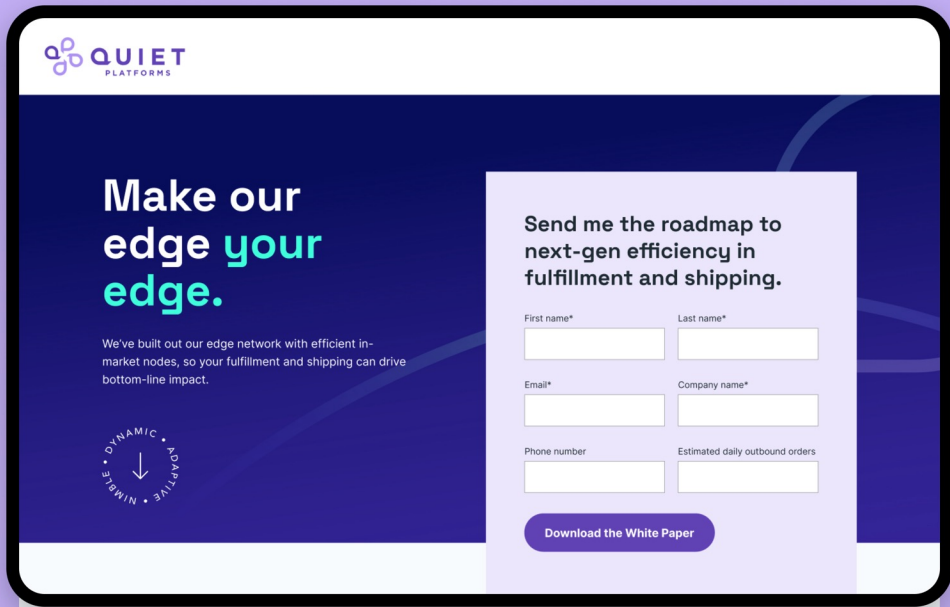
Optimized Inventory = Improved Cash Flow

Enjoy more options to position and flow inventory for higher margins and faster cash-to-cash cycles.

Digital Awareness Campaigns were personalized and segmented based on the persona research and extended the look and feel.



Unique landing pages paid off each ad to ensure a cohesive experience.



The Results

Quiet Platforms saw a **5x increase** in the number of leads generated and more than halved their cost per lead (**54% CPL reduction**) relative to prior campaigns.

In the messaging tests, we found that the first messaging theme of “saving time/money” had a 4.5x engagement rate relative to the other two themes deployed. We then optimized the next wave of the campaign to double down on the messaging that resonated most.

The campaign generated leads from a number of high-profile key prospects, including Cardinal Health, Accenture and Pitney Bowes, among others.