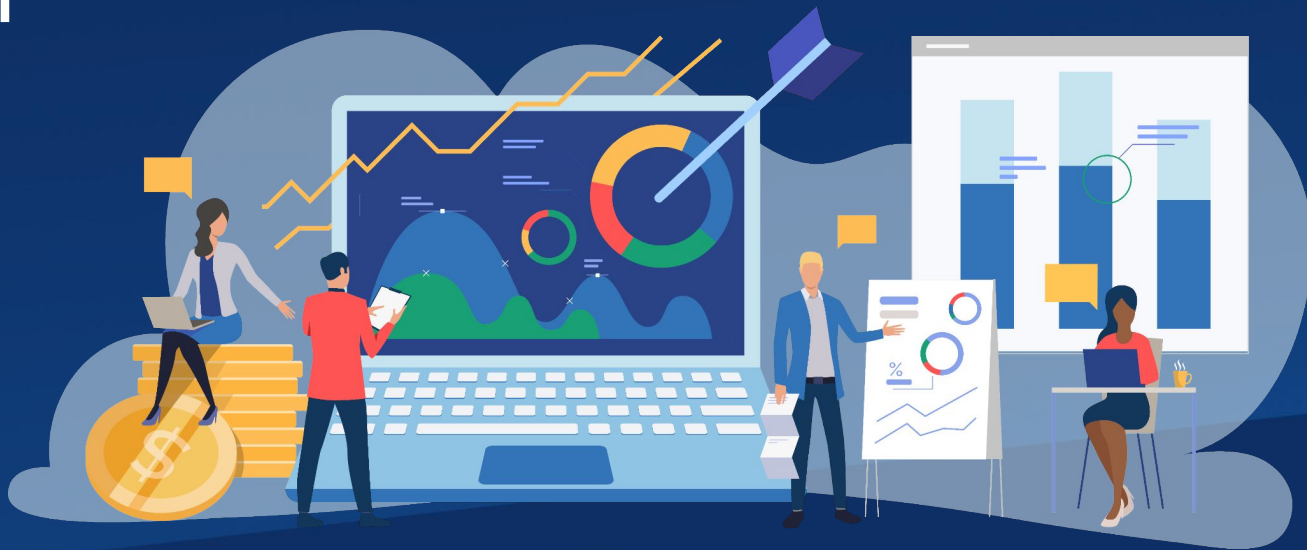


evercheck 

# EverCheck Marketing Strategy Playbook

2021



## EverCheck's Mission

Our mission is to make the experience of administrative work better for every healthcare worker in the US.

# EverCheck's Core Values

**Our company was founded upon six core values.**

We use these as guiding principles in our day-to-day decision making.



Think  
**green**



Pursue  
**growth & learning**



Embrace  
**& drive change**



Good design is  
**good business**



Wow  
**customer service**



Live  
**balanced**

# Positioning Statement & Value Propositions

Since 2012, Evercheck has been on a mission to make the experience of administrative work better for every healthcare worker in the US. Today, nearly 400 healthcare organizations are using EverCheck's Clear to Work ® platform, and have been able to completely transform and streamline their HR administrative workflows and processes.

Comprised of EverCheck HR, EverCheck Education, EverCheck Credentialing, and EverCheck Wallet, EverCheck's Clear to Work ® platform gives healthcare workers the tools they need to work better. EverCheck also fosters a "live balanced" employee workplace culture, and has been voted "Best Place to Work" several years in a row from Outside Magazine.



# Positioning Statement & Value Propositions

## Market Problems & Customer Pains

Hospital organizations need an automated way to verify licenses.

## Our Solution



**evercheck** HR

## Benefits

- EC HR is the only solution where daily automated LV is the standard
- Tracks job-required licensure
- Greater visibility and reports for leadership
- Clear to Work ® platform as central source of truth
- Confidence that employees are clear to work
- Exclusions monitoring & MVR verification
- Flawless integrations

# Positioning Statement & Value Propositions

## Market Problems & Customer Pains

Hospital's Medical Staff and HR departments are inundated with daily tasks to try and keep up with maintaining employee credentials in one central place.

## Our Solution



**evercheck**Credentialing

## Benefits

- Seamless experience for providers and medical staff professionals
- Faster turnaround times for proving compliance
- Fewer lapsed credentials with automated renewal reminders
- Improved workflows with one source of truth
- White glove concierge service for busy caregivers

# Positioning Statement & Value Propositions

## Market Problems & Customer Pains

Caregivers are unable to maintain their own licences in one central place, and sometimes have issues sharing these credentials with their HR/ Medical Staff department.

## Our Solution



**evercheck** Wallet

## Benefits

- Digital keychain for licensure and credentials - completely paperless (caregiver)
- Better transparency with employee records and licensure (employer)
- Electronic updates and notifications (both caregiver & employer)
- Adoption reporting for caregivers (employers)
- Accessible app via Apple, Google, Desktop, and mobile web. (Caregiver)

# Positioning Statement & Value Propositions

## Market Problems & Customer Pains

Continuing education courses and transcript compliance for employees can be hard for compliance leaders in healthcare to monitor and track accordingly.

## Our Solution



**evercheck Education**

## Benefits

- Track CE and manage compliance effortlessly
- Schedule automated CE deadline and renewal for employees
- Insights and access to enterprise reporting
- CE Broker integration
- Free CE resources



# Top Competitors in 2021 by product

## EverCheck HR

- Provider Trust
- Verisys
- PreCheck
- Verity Stream
- Streamline Verify
- Atlas Certified

## EverCheck Wallet

- Axuall
- Merit
- Epic ECFMG
- Nurse Backpack
- Med-Trainer
- NurseGrid

## EverCheck Credentialing

- MD Staff
- Cactus by Symplr
- Verifiable
- Skillsurvey
- Credential
- OnDemand
- Verity & Credential
- My Doc
- Verisys

## EverCheck Education

- Nurse.com /  
Continuingeducation.com
- Elevate
- Relias
- Cornerstone
- Healthstream
- Ethos
- InReachCE

# SMART Goals and SWOT Analysis

**Our SMART goal is to increase EverCheck's brand visibility amongst healthcare organizations and key decision-makers and increase overall healthcare professionals in the EverCheck system in 2022 by  $x$  %.**

---

## Strengths

Daily automated license verification, Clear to Work® platform, great relationships with government agencies and boards, good design, great customer service, nearly 400 healthcare partners, over 1M daily license verifications performed per day, two-way integration, and an intuitive interface with great functionality.

# SMART Goals and SWOT Analysis

**Our SMART goal is to increase EverCheck's brand visibility amongst healthcare organizations and key decision-makers and increase overall healthcare professionals in the EverCheck system in 2022 by  $x$  %.**

---

## **Weaknesses**

Our top competitors such as Provider Trust, have a lot of funding from other entities, including additional marketing resources & budget, more employees to create content (blogs, webinars, podcasts, workshops, guides/checklists, case studies, videos, etc.).

# SMART Goals and SWOT Analysis

**Our SMART goal is to increase EverCheck's brand visibility amongst healthcare organizations and key decision-makers and increase overall healthcare professionals in the EverCheck system in 2022 by  $x$  %.**

---

## Opportunities

Creating a larger brand campaign with sub-campaign strategies to increase brand awareness and visibility to the healthcare market share we are trying to sell to. Increasing visibility on our website, social media, lead generation campaigns to increase our email list and demo sign-ups, etc. Providing a clear message moving forward of who EverCheck is as a brand and why we do what we do from a (storytelling perspective) by leveraging video, conducting interviews with employees, and creating an excitement to work at EverCheck from a public perspective. Attending new trade shows and conferences that make sense to the key decision-makers we are trying to target, purchasing additional media buys for web-based advertising, radio, or other resources that can help increase brand awareness. Crafting a unique selling proposition, and revamping the website to create a better customer journey. Ensuring that the product names are unified with the internal apps once purchased. Finding a way to better exploit product marketing opportunities within the CTW platform, and giving users the opportunity to convert and/or upgrade their product within the platform itself.

# SMART Goals and SWOT Analysis

**Our SMART goal is to increase EverCheck's brand visibility amongst healthcare organizations and key decision-makers and increase overall healthcare professionals in the EverCheck system in 2022 by  $x$  %.**

---

## Threats

Budget, lack of funding resources due to being a private company, low design and development resources for design UX immediate changes and new marketing campaigns, lack of video resources and marketing employees to produce other forms of content we may need to compete with our top competitors in the industry, low social media visibility and lack of previous lead generation campaigns, lack of y/y reporting to show trends in previous marketing efforts.

# EverCheck HR Buyer Personas

EverCheck's target audience encompasses all healthcare organizations where we do not have market share, and the key stakeholders within those healthcare organizations that make decisions for the organization, especially regarding technology. Some key stakeholders that we target would be: HR leaders (VP, Manager, Coordinator, Analyst), Compliance leaders, Risk Management, IT, and executive leadership such as: CHRO, EVP of HR, etc. Based on our most common buyer personas, please see the profiles below.

**Visit this link for the complete Buyer Persona profiles:**

*[https://cebroker-my.sharepoint.com/:p:/g/personal/jnestor\\_cebroker\\_onmicrosoft\\_com/EZFtX3fn-R1GqtdvjBeonVoByhz4Uy7liEPqQG1e-DpFw?e=3yQQFT](https://cebroker-my.sharepoint.com/:p:/g/personal/jnestor_cebroker_onmicrosoft_com/EZFtX3fn-R1GqtdvjBeonVoByhz4Uy7liEPqQG1e-DpFw?e=3yQQFT)*

# EverCheck HR Buyer Personas



## HR Harriet

General Demographics

- 45-55+ year old female
- 85,000-120,000 per year
- Master's Degree in Administrative HR or Healthcare HR



## Compliance Carol

General Demographics

- 40-55+ year old female
- 90-120,000 per year
- Master's degree in Legal Healthcare, Compliance, Risk Management, or MBA



## Prehire Paul

General Demographics

- 25-35+ year old male
- 45-65,000 per year
- Bachelor's Degree in Human Resources, or 3-5 years of experience in recruiting or talent acquisition



## Wallet Walter (Future Persona)

General Demographics

- 35-65+ year old male
- 70,000-150,000 per year
- BSN, Masters of Nursing, PHD, anyone with a Medical license, etc.
- Works at a healthcare organization

# The EverCheck Customer Journey Map

**This customer journey map is broken down into these categories:**

- Touchpoints
- Customer process
- Customer motivations
- Emotions of the customer
- Any barriers they may experience

The customer will experience these stages above during the official marketing/sales funnel process.

**Please view the complete customer journey map here:**

<https://docs.google.com/document/d/13XQhBu56YMQhLkSSQ4uqTXTgm6doWaBmjGoZqxVJEAk/edit?usp=sharing>

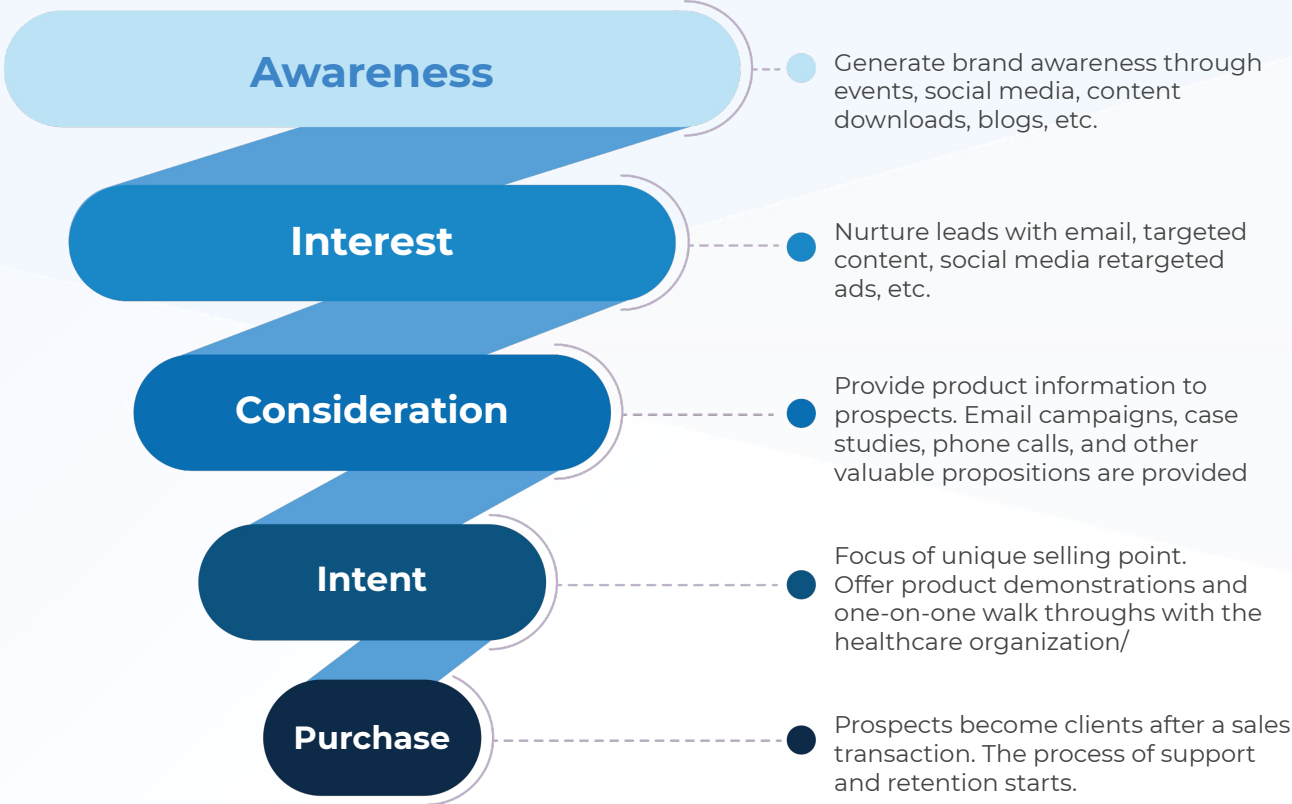


# The EverCheck Customer Journey Map

	Awareness	Consideration/research	Purchase/sign-up	Retention
Touchpoints	Word of mouth, traditional media, social media, searching Google	Website, blogs, or social media, Googling license verification solutions	Speaks to EC sales rep	Website, app, email, or social/community engagement
Customer process	First encounter, hears from friend, sees an advertisement, or some form of branding	Compare & evaluate alternatives	Makes purchase	Renews subscription, maintains high customer satisfaction happiness score
Motivations	Wants a product to complement and increase workflow efficiencies	Find a go-to product with all desired features	Created better workflow efficiencies for the organization	Commits to a better technology solution
Emotions	Intrigued	Curious	Excited	Eager
Barriers	Competition	Lack of information	Price	Technology issues may occur

# Our EverCheck Marketing & Sales Funnel

This funnel diagram describes the entire prospect process based on how the client hears about us, places interest, considers the product, has buying intent, and finally, decides to purchase.



# Our EverCheck Marketing & Sales Funnel Workflow

This funnel diagram describes the entire prospect process based on how the client hears about us, places interest, considers the product, has buying intent, and finally, decides to purchase.

Lead generation/Brand awareness

Initial consideration

Engagement

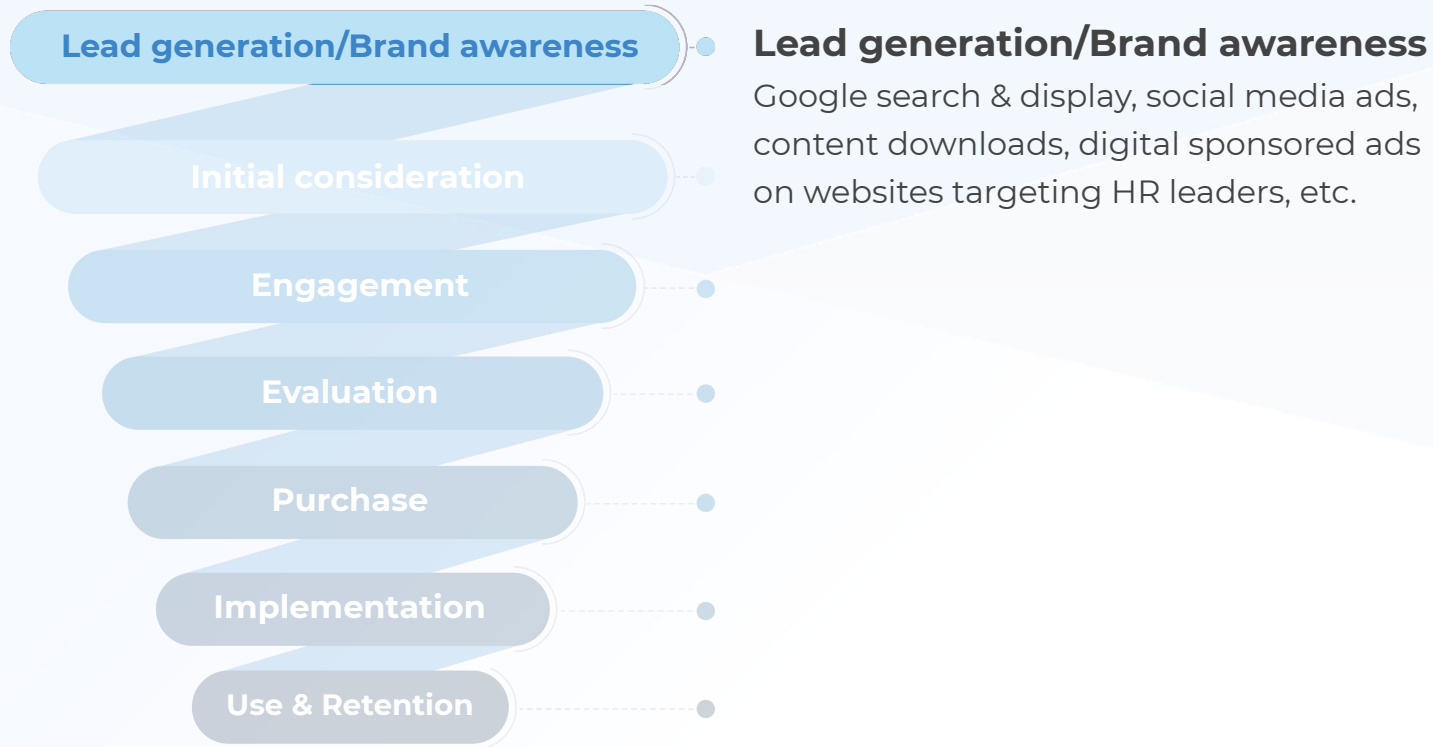
Evaluation

Purchase

Implementation

Use & Retention

# EverCheck's workflow for the marketing & sales funnel explained



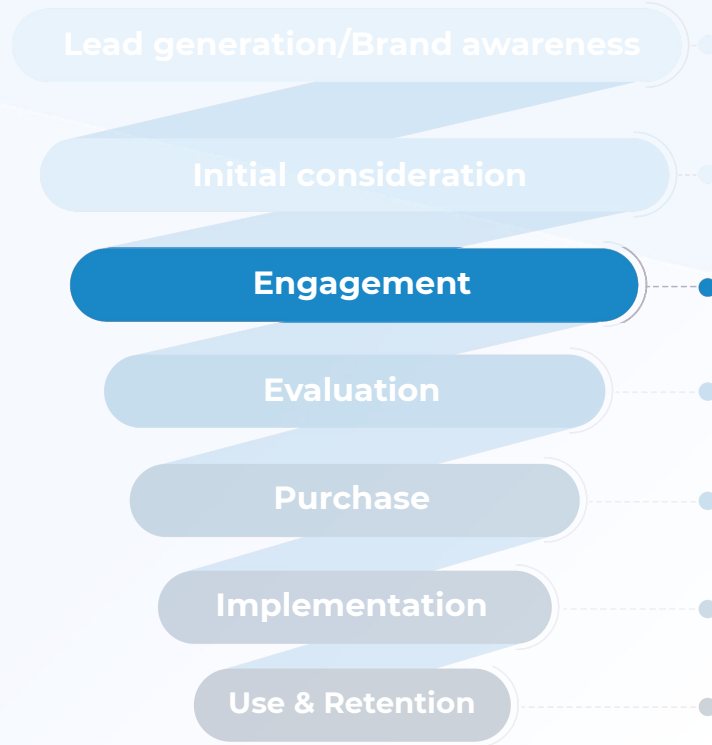
# EverCheck's workflow for the marketing & sales funnel explained



## **Initial consideration**

Customer is considering EverCheck, has been contacted by sales, seen an ad, or heard about EverCheck from another healthcare organization, therefore is now in our sales funnel within Hubspot as a contact.

# EverCheck's workflow for the marketing & sales funnel explained



Lead generation/Brand awareness

Initial consideration

**Engagement**

Evaluation

Purchase

Implementation

Use & Retention

## **Engagement**

First interaction has been made, follow-up communications have been made about our product(s), and a demo has been scheduled.

# EverCheck's workflow for the marketing & sales funnel explained



# EverCheck's workflow for the marketing & sales funnel explained





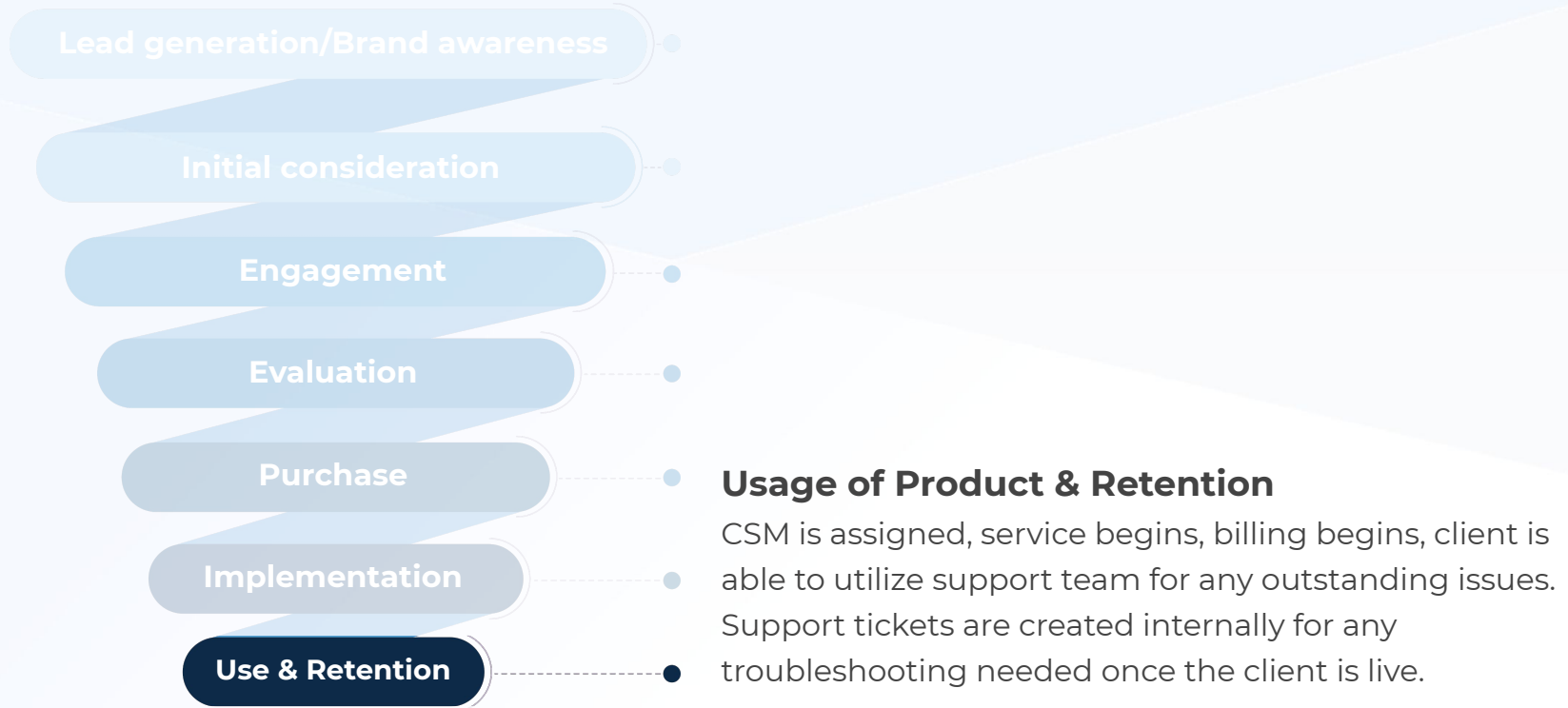
# EverCheck's workflow for the marketing & sales funnel explained



## **Implementation**

Implementation begins and training, collateral items, testing, and implementation of the product occurs in an 8-12 week rollout sequence.

# EverCheck's workflow for the marketing & sales funnel explained



# Marketing Organizational Goals based off our SWOT Analysis

- Create more brand awareness and visibility for EverCheck.
- Generate net new leads (clients) on specialized landing pages via targeted marketing campaigns.
- Drive traffic to the website and increase sales demo form submissions.
- Offer content downloads to generate new leads via email and develop new content that resonates with our buyer personas through all stages of the customer journey. Add thought leadership content to the scope of our strategy to position ourselves as a leader in the SaaS industry for healthcare. |
- Develop robust marketing event strategies and research different trade shows and conferences EC should have a presence in.

# Marketing Organizational Goals based off our SWOT Analysis

- Beat out our top competitors through strategic marketing tactics and gain more market share of healthcare organizations.
- Increase followers on all social media channels and create paid advertising campaigns on FB, LinkedIn, Google, Twitter, etc.
- Include more culture-focused marketing strategies featuring employee interviews, videos, and employee highlight reels that will be public-facing and shared with employees through basecamp.
- Increase media buy opportunities for sponsored content, ads, etc.
- Work with the sales team to gain new client testimonials, case studies, etc. from satisfied clients.
- Increase reporting efforts and share data with internal stakeholders through the marketing and leadership dashboards. Monthly marketing reports will be sent out via Basecamp.

## Q4: Marketing Department Goals (OKR's)

**Goal #1** Increase website traffic by 5% through driving paid ads through Google, Facebook, LinkedIn, etc to the site.

**Goal #2** Increase social media following by 5% from promoting more through our emails to clients (using icons), social media ads, and internally with employee interactions.

**Goal #3** Gain 5-10 new true leads per month for sales by driving potential net new clients to the schedule a demo form on the website.

**Goal #4** Develop 1-2 pieces of new EverCheck content per month that converts (White papers, check lists, how-to guides, comparison charts featuring product info, etc.). Create custom landing pages that convert and drive downloads and generate 10-20 form submissions per piece of content.

**Goal #5** Promote ECC and gain 2-3 new beta testers by launching LinkedIn ads.

# Organic Social Media Strategy Goal

To generate brand awareness, generate conversations and engage with others, be an industry leader in healthcare LV software, understand and know our EverCheck audience, spy on our competitors, and increase social media following.



# Organic Social Media Strategy Details

## Target Audience

- Prospect Clients that meet our buyer persona's demographics and requirements.
- All ages & genders who hold specific healthcare positions apply on social media targeting, but mainly focus would be 25+ based on those who hold these positions.
- HR leaders, Credentialing leaders, healthcare professionals, key decision makers and executives, and healthcare organizations that currently do not use EverCheck HR.

## EverCheck Social media channels

- LinkedIn <https://www.linkedin.com/company/evercheck/>
- Facebook <https://www.facebook.com/EverCheck>
- Twitter [https://twitter.com/evercheck\\_news](https://twitter.com/evercheck_news)
- Instagram [https://www.instagram.com/evercheck\\_culture/](https://www.instagram.com/evercheck_culture/)

## Brand Personality/Tone of Voice

- Professional but not stiff
- Friendly but not cavalier
- Innovative but not intimidating
- Knowledgeable but not pretentious
- Caring but not a pushover
- Receptive but not obliging
- Mindful but not neurotic
- Trustworthy but not beyond reproach
- Genuine but not arrogant
- Fun but not irresponsible

# Organic Social Media Strategy Strategy

Post relevant content that has a healthy and diverse mixture of articles, blogs, employee interviews, healthcare holidays/US holidays, videos, gifs, client testimonials, case studies, encouraging demo form submissions, driving traffic to the website for visibility, product plugs, and free content downloads.

Organic and sponsored posts will be created in Hubspot to accurately track data. Instagram will remain manual for now. This is a flexible schedule, based on our ability to repurpose and create new content. **We should at least be posting 3x per week on our desired top channels and recognizing healthcare holidays that relate to our target audience as well.**

f

in

Post **2-3x** at least per week on LinkedIn/Facebook, but preferably daily until we generate more reach and engagement on our social channels. We should also be engaging with those who comment on our posts.



Post at least **1x** per week on Instagram and Twitter to remain active, (unless there are hot updates to post more).



We should be engaging and retweeting on Twitter at least **1x** per week to stay relevant and provide value. Let's also engage & respond to anyone who mentions EverCheck, and comment on the post/mention.



# Organic Social Media Strategy Strategy

Content ideas per week based on our current social engagement.

We do not need to post daily, but here is a good gauge on content rotation.

## Monday

Post Blogs or share industry-related articles.

## Tuesday

Post product plugs-learn more about (ECHR, Wallet, etc.) or drive traffic to the website to schedule a demo, blog posts that are relevant, etc. (promote post for \$30)

## Wednesday

Customer loyalty/testimonials, client satisfaction or happiness score posts, or blog posts.

## Thursday

Offer free content download, or a general brand awareness post about EverCheck as a company (company history trivia posts, or facts), Ted Talks about healthcare HR or software, "How-to" articles, white papers, checklists, etc.

## Friday

Culture content employee or CEO interviews, shout-outs, Birthdays, spotlight, hiring posts, volunteering, sustainability posts, 1% for the planet partnership posts, etc.

# Content Strategy Goal

**Generate engagement, leads, and nurture our current clients.  
Set ourselves apart as a thought leader in the industry. These  
are the current forms of content we create at EverCheck.  
Content should be fresh, relevant, and modern.**



We should be focusing on creating at least 1-2 new pieces of content per month, and repurposing content whenever applicable. Blogs, E-books, white papers, and other forms of downloadable content should be audited to ensure all backlinks work, data is current, and titles resonate from an SEO perspective.

# Content Strategy Details | External EC content

- **Blogs** | Informative EC, informative non-EC, sales-centric, employee-focused content.
- **EC knowledge center articles for clients** | EC- product focused content.
- **Articles** | Mixture of product, employee, co-sponsored client content, and brand articles.
- **Employee Interviews (spotlight)** | EC articles focusing on employee wins or getting to know employees, new roles, etc.
- **RFP's & Client Demos** | Marketing assists sales in developing and approving custom requests for proposals and sales demos for clients. Works with sales to create excellent client-ready content.
- **White papers** | Should focus on what our clients want to know, should solve a problem and provide a solution. Should drive leads for the business.
- **Checklists** | Should focus on what our clients want to know, should solve a problem and provide a solution. Should drive leads for the business.
- **How-to guides** | Should focus on what our clients want to know, and teach them how to do something related to their job profession (HR-focused tasks, etc.)
- **Social media posts** | Mixture of video, blogs, articles, images, etc. See social media strategy for more information.
- **E-books** | Should focus on what our clients want to know, should solve a problem and provide a solution. Should drive leads for the business.
- **Industry publication contributions and sponsored content** | Currently used for trade shows and events, but could be utilized in other brand-related formats.
- **Emails** | Nurturing leads, generating brand awareness, product updates and features, event-related communications.
- **Website content** | Website audits should be conducted on a regular basis. All content should be relevant, data should be updated, and the employee section should be maintained (headshots).

# Content Strategy Details | Internal EC content

- **Employee interviews/campaigns |** Marketing conducts employee interviews Q&A sessions, creates articles, blogs or social posts introducing employees.
- **Emails |** Marketing helps sales and customer support craft appropriate client-facing emails when needed.
- **Instagram culture posts |** See social media strategy. Marketing takes photos & posts content on IG.
- **Monthly Round-up |** Marketing reviews the content provided by the Product team to ensure that it's delivering value to the client experience without raising any red flags.

# Brand Awareness Strategy



**Our brand awareness strategy should be continuous and should consist of these three pillars below:**

**External brand awareness**

**Internal employee brand awareness**

**Employer brand**

The total budget will vary depending on outside resources and vendors needed, the decision to purchase a video camera or using a videographer, and the marketing budgets' flexibility in hiring freelancers for editing, creating animated videos, and purchasing media buys.

*Please note, that these are suggested strategies that can be leveraged during FY2022, and do not need to be executed all at once. Individual product campaign strategies are not included below.*

# Brand Awareness Strategy Details | External

- Gain brand awareness and visibility for EverCheck through a mixture of social media, digital ads, a large branding campaign, and more media exposure. (\$\$)
- Partner with local advertising companies such as Jacksonville Business Journal, or radio stations who can get the word out about who we are on a local-scale before going nationwide with our message. (\$\$\$)
- Strategically considering purchasing a short-term billboard space central to where healthcare leaders can see it on the way to work (95s), JTB, etc. (\$\$\$)
- Sponsor additional ad buys that are tied to ASHHRA, and other large HR conferences or events that drive healthcare leaders and decision makers as their target audience. (\$\$)
- Re-analyze the brand story we want to tell, and develop savvy taglines for brand campaigns that can tie to: loyalty, trust, and passionate/friendly people.
- Develop 1-2 animated videos per year, and social media GIF's that describe our products and software. (\$\$)
- Create opportunities and resources to shoot authentic brand-related video content such as: Brian the CEO discussing our relationship with 1% for the planet and our employee volunteering efforts, the history of EverCheck, and the impact our solution has had on our clients who work with us. Or Angie discussing where we are going as an organization and how our sales process differs from anyone else. For example: we believe that our sales process is unique due to the nature of how we build and foster client relationships and only offer what they need vs. being aggressive. Our people are passionate about helping healthcare workers spend less time on daily administrative tasks, etc. Developing storyboards and scripts for videos we feel would drive the story of EverCheck home to those who do not currently know who we are. These videos would be used via our website, social media, and can also be used as sponsored content for ASHRA or other high-priority events. (\$\$\$)
- Drive traffic to our website with a mixture of lead generation strategies through social media ads, content that converts, and organic posts with clear call-to-actions- Ex: (free content downloads, scheduling a demo with us, sales posts, learning more about Evercheck, etc.)
- Garner client testimonials from our top 2-3 clients that we can use for case studies for the website and social media.

# Brand Awareness Strategy Details | Internal

- Gain employee buy-in by asking them to engage with our social media content.
- Conduct employee interviews with the intention of releasing at least 1 per month, to celebrate new employees and why they're passionate about working for EverCheck. The goal would be to share these interviews internally on Basecamp & also social media to increase employee morale.
- Add branded highlight reel icons to Instagram for our top priority culture-focused items at EC- sustainability, volunteering, blogs, employee testimonials, etc.
- Assist with internal employee communications, and provide ideas to Bonnie/HR on how we can release more employee swag items and create engaging employee-related events throughout the year.

# Employer Brand Strategy Details | TBD w/ Julia

- Help develop hiring content and social media posts for LinkedIn that feature open positions. Consider paid job promotions on LinkedIn for more visibility.
- Assist Julia and the EverCheck recruiting team with developing appropriate employee-related brand messaging that helps identify us as a “Best Place to Work.” Ask employees to share all of our content on social media, and comment on our content with responses of how much they enjoy working at EverCheck.
- Create a “Best Place to Work” campaign by conducting video employee interviews asking employees why they love working at EverCheck. This campaign would be shared on our website and via social media. Partner with Outside Magazine to see if the rep has ideas or a media kit on this to share with us. (\$\$)



# Event and Tradeshow Strategy

**Ensure the team represents EverCheck in a professional manner, and that those who attend the event learn more about our products, and why they should choose to schedule a demo with us.**



Our event and tradeshow strategy should include the steps it takes to research, develop, and participate in a great event.

# Event and Tradeshow Strategy Details

- 1 | Research tradeshows and events for EverCheck to attend for FY 2022.
- 2 | Consider selecting additional ad buys to promote EC that are tied to the conference/event.
- 3 | Conduct an internal meeting with all stakeholders that need to be involved with the event, and discuss next steps.
- 4 | Create a Basecamp to-do list to ensure all of our items are completed for the event well in advance.
  - Booth set up items
  - Registrations (who is attending from EC to represent our team)
  - Marketing items (emails, lists, social posts, etc.)
- 5 | Create buzz for 1-2 months before the event that we are attending.  
This should encompass : emails, social media, possibly a newsletter, etc. leading up to the event.

# Event and Tradeshow Strategy Details

- 6 |** Develop any materials needed for the event such as: small cards, one-sheeters, informational items, landing pages, free content downloads, etc.
- 7 |** Develop an email campaign that includes a touchpoint sequence: 2 weeks prior to the event, 1 week leading up to the event, and a day before the event. A post-show email should also be created.
- 8 |** Decide whether we will be hosting any giveaways, handing out swag, and what that looks like. All tradeshow and booth items should be ready-to go at least a week prior to attending the event, if in person.
- 9 |** During the event, be sure to promote EC in a professional manner and kindly answer all questions. Provide information to schedule a demo, speak to a sales rep, etc.
- 10 |** As a wrap-up to the event, conduct another follow-up meeting with key stakeholders to discuss feedback to determine the strategy for next year's attendance and what that may look like.