



# **2010 - 2011 Strategic Plan**

*(Updated 11/11/10)*

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## Executive Summary

The Los Angeles Association of Health Underwriters (LAAHU) is a not-for-profit association dedicated to providing education, legislation advocacy and industry support to California agents and brokers in the delivery of employee benefits. A member of the National Association of Health Underwriters, LAAHU's Board of Directors are a respected authority on state and federal legislative issues impacting the health insurance industry.

Our guiding principles are unwavering support and unconditional belief in our members. Connecting people and enriching lives through education, new and creative ideas. Enhancing the necessity and image of the insurance professional.

LAAHU has steadily grown since 1979 both in number of members as well as in stature. New committees have been added over the years, new benefits to members and new opportunities for agents to raise their professionalism.

LAAHU is your industry association. Its purpose is to unite health insurance professionals in the Los Angeles basin to:

- Protect and increase your business
- Keep up with the rapid changes in the health care marketplace - new laws, products and services
- Provide a high level of service to your clients
- Help your clients comply with current laws and regulations
- Protect our industry and the private insurance marketplace
- Help shape healthcare policy
- Participate in grass roots efforts to influence health care legislation
- Learn from industry leaders through our programs, meetings and publications
- Give back to an industry that has provided for you
- Enhance your professionalism
- Be a leader in our industry
- Share ideas and information with your colleagues

Successful implementation of the plan will result in:

- An infrastructure fully able to support, guide and run a growing organization.
- Sufficient support to significantly increase membership to 10% growth annually, while providing resources to our membership that will increase the awareness of programs and tools available.

- Increased brand awareness, preference, image and customer loyalty.
- Becoming the most innovative and efficient Health Underwriters Association in California.

## Vision

LAAHU empowers our members by providing the tools to succeed in today's ever changing healthcare industry.

## Mission

Provide members professional growth and a powerful voice at the local level by delivering valuable networking and educational opportunities.

## Board of Directors Guiding Principles

- ❑ Unwavering support and unconditional belief in our members.
- ❑ Connecting people and enriching lives through education, new and creative ideas.
- ❑ Enhancing the necessity and image of the insurance professional.

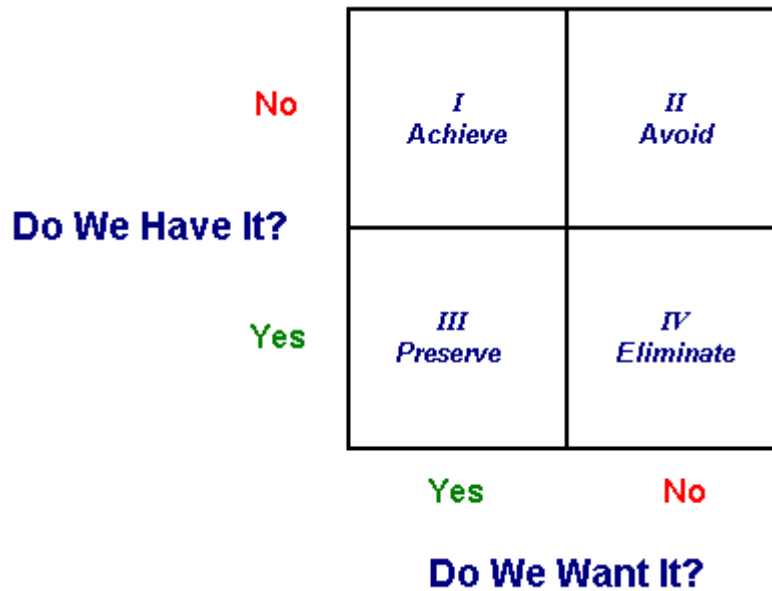
## Value Communication Tenets

- ❑ Enhance the necessity and image of insurance professionals.
- ❑ Connect people and enrich lives through education, networking and mentoring.
- ❑ Keep members informed on in vital legislative matters.
- ❑ Provide a respectful lobbying voice that legislators listen to.
- ❑ Give back to the communities in which we do business.

## Competition

How does LAAHU remain the largest Association of Health Underwriters (AHU) Chapter in California? By increasing the value of its services and resources, build on its image and communicate out to the consumer the value of the broker. LAAHU's competition is the California market, by way of mergers and acquisitions on the carrier side, a challenging economy, and the never ending battle of healthcare reform and other legislative mandates and restrictions.

## Goals and Strategies



### Achieve

- The development of an infrastructure to support growth by 50% over the next three years without sacrificing service.
- An increase in our presence with other “like” associations by capitalizing on best practices.
- Capitalization on existing assets and strategically increase presence through marketing efforts.
- A strengthened awareness of LAAHU’s brand personality and image through a refined visual design system and formats.
- The implementation of metrics to measure the success of marketing and operational programs.

### Avoid

- Service levels dropping by effectively measuring and monitoring membership needs.
- Bureaucracy - sustain the family-like environment, while increasing efficiencies in work process – but avoid bottlenecks (lack of delegation).
- Differentiation should be built on the controllable resources of LAAHU.

## Preserve

- Continue to deliver programs and resources that treat the broker as the most important client, involve personable human interaction and utilize technology to facilitate the process.
- Maintain the reputation of LAAHU – ethical, caring, accessible and knowledgeable.
- The reputation as the industry expert on current legislation, continuing education and being the broker’s advocate through communication, enhanced web resources and seminar presentations.

## Eliminate

- Excessive workloads that can jeopardize the association’s reputation
- Communication breakdowns that increase member confusion and frustration.
- The feeling that LAAHU is the “good old boys network

## Short Term Objectives

- Technology ~ Enhance LAAHU website and email with a new visual appearance and messaging by year end 2010:
  - Clean, user-friendly website: easy to navigate
  - Email blast template “eNews Flash”
  - Online event registration
  - Current membership database – easy to use
  - Customer profiling capabilities on our membership
  - Member Satisfaction Surveys
  - Communicate regularly to membership
  - Develop an online resource center for membership
  - Implement Post-Event Online Survey’s
  - Offer Member Blog’s
  - Design a Business Partners Section

- Events ~ Reinvent our monthly meetings that deliver sales and marketing information to help grow a members book of business, creating a “warm & fuzzy” environment throughout – 2010-2011:
  - Healthcare Reform Summit
  - Bring a client to a meeting
  - Hospitality committee (Ambassadors) that welcomes new members
  - “Fun” type events for members
  - Allow for audience participation at meetings
  - Implement mixers
  - Determine the number / location of meetings
- Marketing ~ Develop a strong Communications / Marketing Committee by 1<sup>st</sup> Qtr, 2011:
  - A process driven committee that adheres to tight timelines
  - Synergy in the messaging across all communication mediums
  - Timely communications that will maximize member participation
  - Implement the “new” look & feel of LAAHU through all communications, meetings/events and contacts with members
  - Communicate to membership our new purpose and direction
  - More marketing ideas with sales and service (MISS) during member meetings
  - Take Action Now (TAN) – show members our leadership and innovation
  - Build Up Brokers (BUB) Educate the Role of the Broker to consumers
  - Reinvent touch points – signage, music, video, opening/closing of each meeting/event
- Membership ~ Enhance the functionality of the Membership Committee by 2011:
  - Formalize a process for communicating with new members
  - Establish a process to better coordinate vision and actions with CAHU and NAHU
  - Contact made within 1 month, 3 months and 6 months (with new members?)
  - Implement new membership level goals

- Identify & Communicate the value of membership
- Survey membership quarterly
- New agent mentor programs
- Agent referral programs
- Take Retention Personally
- Groom future leaders
- New Membership recruitment blitz
- Legislation ~ Capitalize on the strength of LAAHU as the brokers advocate by mid-2008:
  - Develop programs that will help build a war chest to face future challenges
  - Expand Legislative Committee
  - Provide Effective and easy to understand updates
- Tracking & Metrics ~ Establish a gatekeeper and system that will effectively allow the Board to stay on top of projects and measure effectiveness by mid-2011:
  - Assign a volunteer to track and stay on top of timelines
  - Communicate to Board Committees responsibilities and progress
  - Measure effectiveness of projects and adjust if necessary
  - Implement accountability process at Board meetings
  - Utilize PESC to its fullest for reporting and metrics

## Long Term Objectives

- LAAHU's ongoing goals are to increase membership, increase member participation in LAAHU's offerings, enhance public awareness and image, and increase revenue and growth of LAAHU. LAAHU's long-term strategies, to be implemented in the next 2-3 years, include:
  - To become the leading AHU nationally
  - Annually increase membership by 15%
  - Reduce annual attrition to 8% or less
  - Upgrade technology capabilities to be database driven

- ❑ Provide interactive online member services
- ❑ Have access to current and accurate membership information
- ❑ Assemble a new board of directors and set term limits

## Grand Strategies

LAAHU's Strategic Plan will be ongoing and carried out over the next three years. The first phase will be implemented during 2010, with benchmarks along the way. At the end of the 2010 - 2011 year, a full review will take place to assess the effectiveness of each project, and to make adjustments to the next phase of the plan. LAAHU will engage in ongoing communications with its membership to acquire their input on various components of LAAHU's direction and effectiveness.

Additionally, LAAHU's Strategic Plan will be augmented at each Strategic Planning meeting in May of each year.

## Appendices

- Short Term Budget Planning

Historically, the last three years of budget vs. actual has been consistent. There have been no real significant changes; give or take 10% variance over 2007, 2008 and 2009 income and expenses.

- Monitoring and Evaluation of Plan

LAAHU will discuss and augment the Strategic Plan at its annual Strategic Planning meeting. The Board of Directors will provide input that will help to finalize, realign or revise various aspects of the plan that are needed. Short-term goals will be evaluated at the monthly Board of Directors meeting.

- Communication of Plan

PESC and Board members will work together to implement, amend, refine and approve aspects of the Strategic Plan. While PESC will handle day-to-day operations, the Board will implement their responsibilities and act as overseers of the plan. They will check on the status of technology enhancements, monitor budget and make sure all projects and programs are on track.

