Ensuring Accurate Perceptions of the Health Insurance Industry

June 1, 2007
Principles Governing Communications to and from Member Companies

- Strategy and tactics documents will not be distributed.

- Publicly available, factual information (i.e., scheduled events, premieres, information about the film) will be distributed.

- Recommended responses and messages will be shared in hard copy with companies’ senior communications executives.

- Meetings will be held in person, when possible, or via secure conference call lines and password-protected online meetings.

- Please assume that any communications that your company prepares and widely shares on this subject will end up on Moore’s Web site.
Setting the Stage: Operating Principles

We have agreed that the industry is under attack and must:

✓ Continue engaging strategically (do not “take the bait”)
✓ Demonstrate the industry’s commitment to positive reforms
✓ Focus on how we add value to the system
✓ Strengthen relationships with stakeholders and build trust
Situation Analysis: Background

- **SiCKO:** To be released in the U.S. on June 29, 2007 (pre-launch in MI on June 16, 2007)
- Run time: 113 minutes
- Rating: PG-13
- High Profile Debut: Cannes Film Festival
- Significant Hollywood and Washington Resources
  - Marketed and distributed by: Harvey Weinstein (former CEO of Miramax)
  - Movie’s spokesman: Chris Lehane, a former political adviser in the Clinton White House and the 2000 Gore Presidential Campaign
Situation Analysis: Quantifying the Media We’re Up Against

- Moviegoers paying to hear Moore’s story: $30-$200 million
- Moore’s promotional budget: $15-$25 million
- Promotion via Newspaper Coverage: equivalent to ~$150-$250 million*
- Promotion via broadcast news and talk shows: equivalent to ~$150-$250 million*

Total Media: $345-$725 million

*This is a rough forward-looking and conservative estimate of what it would cost to purchase equivalent paid media attention.
Situation Analysis: Media Coverage

- **Coverage has been largely “cinematic” – 1,200 clips to date**
  - Majority of the coverage is by movie and entertainment reporters, and reviews have been positive, urging people to see it; “better than Fahrenheit 9/11”

- **Political reporters are beginning to cover the fallout from the movie**
  - e.g., Moore’s investigation by Dept of Treasury for taking people to Cuba

- **The film’s vignettes are getting independent coverage**
  - e.g., 60 Minutes covered the LA case on Sunday, May 20th that resulted in a Kaiser Permanente settlement

- **SiCKO is a hit with bloggers**
  - More than 1,000 bloggers have written about the movie since Moore released the trailers; most reviews are positive
Review: 5 Strategies We Reached Consensus On

1. **Debate the System, Not the Anecdotes:**
   Set record straight then get off Moore’s turf and on to ours

2. **Reframe the Debate:**
   Mount Campaign against a Government-run Health Care System

3. **Define the Health Insurance Industry as Part of the Solution**

4. **Caution Democrats Against Aligning with Moore’s Extremist Agenda**

5. **Game Plan for Various Potential Scenarios**
Review: Our Target Audiences

- Federal and state policymakers
- National media and media in key markets
- Political and health policy influencers
- Industry employees
Strategy 1: Overview of Work Streams

- **Work Stream 1:** Provide ongoing monitoring and a complete resource library around the movie and facts in the movie
- **Work Stream 2:** Compile facts (as possible) on specific allegations in the movie
- **Work Stream 3:** Get out front of national coverage around the premiere of the movie
Strategy 1: Tactics and Timeline

Provide ongoing monitoring and a complete resource library around the movie and facts in the movie

— Create an up-to-the-minute media and Web monitoring system around the movie
— Catalog all media to date around SiCKO
— Highlight most outrageous quotes from Moore, document his positions in key issues
— Log all known cases, attacks on industry, people in film
— Track events, screenings, etc. related to the movie. Develop a master calendar that can be shared with the companies
— Evaluate how other industries and entities are responding

SiCKO Premiere(s): 6/16 in MI; 6/29 to U.S.

June

July

Aug - Dec

△ Ramp up monitoring and reporting around premiere
△ Get company sign-off on monitoring plan

△ Provide to trusted allies and media post-launch
△ Secure transcript

△ Assign representatives/spokespeople to get involved in each major Moore event for balance
△ Provide monthly report to companies on what other "attacked" entities are doing
Strategy 1: Tactics and Timeline

Compile facts (as possible) on specific allegations in the movie

— Work with companies, as appropriate, to fact-check allegations
— Annotate the complete script of the movie to correct inaccuracies
— Document where industry practices have evolved
— Provide responses and/or guidelines for responding to member companies
— Develop talking points for companies to use to “acknowledge” stories in human terms and to “correct the record” if appropriate
— Media train industry spokespeople

Get out front of national coverage around the premiere of the movie

— Offer industry spokespeople to major national outlets
— Monitor media to try to identify shows where Moore will be featured, actively seek to place an industry spokesperson

SiCKO Premiere(s): 6/16 in MI; 6/29 to U.S.

June

- Hold call to discuss line-by-line responses to each case – and what to do with info

July

- Release report/package on 10 years of progress

- Michael Sheehan training scheduled

Aug - Dec

- Launch satellite media tour

- June 5: Oprah

- Assign representatives/spokespeople to get involved in each major Moore event for balance
## Strategy 2: Overview of Work Streams

<table>
<thead>
<tr>
<th>Reframe the Debate</th>
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<td>Work Stream 1: Build an arsenal of facts about government-run health care</td>
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<tr>
<td>Work Stream 2: Recruit and mobilize allies</td>
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<td>Work Stream 3: Highlight horror stories of government-run systems</td>
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<td>Work Stream 4: Put Moore on defensive regarding Cuba</td>
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Strategy 2: Tactics and Timeline

Build an arsenal of the facts about government-run health care

- Develop myth/fact sheet for allies to disseminate strategically
- Use survey research to validate the perceived shortcomings of single-payer system
- Compile quantitative data and “best of” research on problems with govt-run health care system (rationing, wait times etc.)
- Compile all materials into user-friendly formats for distribution

Recruit and mobilize allies

- Identify free-market allies (Health Care America, AEI, Heritage, CATO, Pacific Research Institute, Galen, etc.) who will have a vested interest in critiquing single payer health care
- Identify Cuban-American organizations that will be outraged by Moore’s portrayal of the Cuban health care system
- Identify “unlikely” allies – medical specialty organizations, patient groups, and others that may oppose government-run health care

SiCKO Premiere(s): 6/16 in MI; 6/29 to U.S.

- June
- July
- August and ongoing

- Create in time for annual meeting and premiere (if possible)
- Continue to update as necessary

- Reach out, convene meeting, develop plan
- Media train, pitch to media
Strategy 2: Tactics and Timeline

Highlight horror stories of govt.-run systems

- Conduct aggressive national and regional media outreach to ensure that allies are inserted into the coverage around the policy debate so that an alternative view is represented in the article
- Create an ad that would show Democrats the likely response to a single-payer proposal. Float the ad on the Internet and encourage conservatives to donate money to the allied organization to support running the ad.
- Produce vignettes featuring victims of single-payer systems. Distribute on web sites, via conservative bloggers and YouTube
- Bring victims of single-payer systems to the US for a media tour
- Interview doctors who work in clinics on the US-Canada border about why Canadians come to the US for care
- Seek opportunities to tell the Single Payer story with national media (WSJ, John Stossel, etc.)

Put Moore on Defensive regarding Cuba

- Encourage Cuban groups to engage with media and directly with Moore
- Encourage elected officials who are sympathetic to Cuban-Americans to criticize Moore for his portrayal of Cuba

(continued)
Strategy 3: Overview of Work Streams

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<th>Define the Health Insurance Industry as Part of the Solution</th>
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<td>▪ Work Stream 1: Spread the word about “proactive solutions” for health care</td>
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<td>▪ Work Stream 2: Conduct fact-based industry value campaign in Beltway and key markets</td>
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<td>▪ Work Stream 3: Raise awareness of the industry’s independent external appeals process</td>
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Strategy 3: Tactics and Timeline

Spread the word about reform proposals

- Host forums in IA, SC, and NH with local partners to push the need for universal coverage that covers all Americans
- Increase Beltway advertising around industry support for universal coverage
- Conduct ed boards, desksides and conference calls on health reform, policy positions with targeted regional media
- Pitch “positive story” via toolkits and reports to key media outlets (e.g., Larry King, News Hour)
- Distribute media packets on industry and its positions broadly

Conduct fact-based industry value campaign in Beltway and key markets

- Survey the companies for compelling case studies
- Ramp up PR around patient-focused stories
- Develop sustained earned and limited paid media effort to showcase the human side of the industry’s contributions
- Collect data on industry progress, customer sat., outcomes, claims approvals, prompt payments, etc.
- Create media tool kit on industry’s positions, strong track records, etc.
Strategy 3: Tactics and Timeline

Raise awareness of the industry’s independent external appeals process

- Identify independent spokespeople from appeal boards who can speak to the media
- Prepare materials for policymakers and the press that document the appeals process and typical time frames
- Consider consumer-friendly changes that could be made to make the appeals process easier to access

Provide guidance on internal communication

- Prepare “distilled” materials that each company can use or tailor to communicate with employees
- Equip company employees with “facts and priorities” sheet to address questions and concerns

(continued)
Strategy 4: Overview of Work Streams

Caution Democrats Against Aligning with Moore’s Extremist Agenda

- Work Stream 1: Encourage centrist Democrats to warn the party about the risk of an association with Moore
- Work Stream 2: Encourage Republicans to raise Moore as a political liability for Democrats
Strategy 4: Tactics and Timeline

Encourage centrist Democrats to warn the party about the risk of an association with Moore

- Conduct research with a Democratic polling firm to show that, regardless of positive movie reviews, Moore’s views are out of sync with most American voters
- Encourage Democratic pundits to speak to media, candidates, congressional leaders, etc. about the potential harms of being linked to Moore
- Seek to place an oped from a prominent Democrat warning about too close an affiliation with Moore

Encourage Republicans to raise Moore as a political liability for Democrats

- Encourage Republican media strategists to cut an ad that shows the way for Republicans to attack Democrats who are too close to Moore
- Distribute the ad to political columnists and via conservative bloggers

SiCKO Premiere(s): 6/16 in MI; 6/29 to U.S. August through Dec

- Launch data at peak of Moore’s promotional plan
- Coincide with premiere
- Focus efforts/outreach in primary states
Strategy 5: Overview of Work Streams

Plan for Various Potential Scenarios

- Work Stream 1: Events by Moore or allies targeting company locations
- Work Stream 2: Significant political events rallying around Moore and/or the movie
- Work Stream 3: Fundamental shift in the health care “center of gravity”
Strategy 5: Tactics and Timeline

Events by Moore or allies targeting company locations
- Suggested action plan for companies with talking points
- Industry “crisis-team” ready to be deployed to hot spots

Significant political events rallying around Moore and/or the movie
- Early warning system via monitoring
- Active campaign to insert industry and ally viewpoints into media coverage

Fundamental shift in the health care “center of gravity”
- Ongoing tracking of public attitudes about single-payer health care
- Ongoing monitoring of public policy proposals put forward to candidates and shifts in rhetoric
- Research and message development for an aggressive national paid and earned media campaign to disqualify government-run health care as a politically viable solution.

SiCKO Premiere(s): 6/16 in MI; 6/29 to U.S. August through Dec

June

△ Disseminate hard copies prior to premiere, adhering to governing principles for communication

July

△ Identify team

△ Launch immediately

August through Dec

△ Launch report on findings, survey data

Begin planning immediately to assess “tipping point,” what campaign would look like
Endgames

**Best Case**

✓ The movie is a major public relations and reputation challenge for a number of months – but does not fundamentally alter the politics of health care

✓ Media coverage reflects the industry’s position, positive initiatives and eagerness to engage in a substantive dialogue

**Worst Case**

✓ Movie changes the political center of gravity on health care

✓ The movie sparks a long-term public relations and reputation challenge for the industry
Discussion
High-Level Timeline for Implementation of Strategic Plan

**Strategies**

- Debate the System, not the Anecdotes
- Define the Health Insurance Industry as Part of the Solution
- Reframe the Debate
- Caution Democrats Against Aligning with Moore’s Extremist Agenda
- Plan for Various Potential Scenarios

**Timeline**

- June 29: SiCKO Premiers in U.S. (June 16 in MI)
  
  Activities to seed the debate must begin right away and continue throughout 2007

- Recruit patient testimonials, conduct research/surveys

- Highlight industry’s proactive policy positions

- Raise awareness of independent external review
  
  Raise awareness of harm of government-run health care
  
  Announce patient-friendly improvements

- Special focus in primary, battleground states and around 2008 election (debates, townhall meetings, etc.)

- Plan for the variety of potential scenarios and continue careful monitoring