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## 5/27 COVID-19 Customer Call Summary Notes

### Jeff Wells, MD, President

*Jeff Wells is a primary care physician by training and one of the co-founders of the OurHealth team. He will be serving as the President of the combined organization going forward. He has been working closely with the teams across both organizations.*

We are excited to make some introductions to our broader customer base today from both Marathon Health and OurHealth. We'd like to highlight a few data points to help orient everyone as **Marathon and OurHealth come together as one organization**. We have the ability today to serve almost 600,000 patient lives across over 40 states. We're working in close partnership with over 160,000 employer groups and are so fortunate to have formed these partnerships. We are optimistic about all that we can do together in the future. We work with a wide range of organizations, from schools and municipalities to manufacturing organizations across the country. We encourage you to think about the power that we can have as a partner to help connect you to others who may be facing very similar circumstances.

Many of our customers are served through a dedicated onsite health center. In certain key markets, we also have a model for nearsite health center locations. With this option, employers can provide their workforce with access to those locations when they might be too small to justify having a dedicated onsite health center in their facility. Or perhaps a very large organization might have a distributed workforce that is out in the field or working from home. This combination of having a dedicated onsite health center, as well as nearsite health centers in shared locations and travel teams for smaller regional centers, allows us to best serve our diverse population of customers. If COVID-19 has taught us anything, it's about the opportunity for us to provide remote care to patients – whether that's telephonic care or virtual care, this service certainly has a role for the future on an ongoing basis.

As we come together as one company, one thing that will not change is our constant commitment to driving engagement, patient experience, health outcomes, and financial savings. If we continue to drive those results and provide customer-focused relationship management and partnerships, at the end of the day we believe you, our customers, will be very pleased with the results. This philosophy and commitment to those core values will not be changing as we merge as one combined organization. We will continue to be open and transparent with you through the coming weeks and months as we integrate our two organizations into one.

As we move forward into a combined organization, we thought it would be helpful to define '**Ambassador**' for those who are not as familiar with the term and its use in our organization. This is the term that the Marathon Health team has used for employees and team members, and is what the combined organization will call its team members in the future. Many of our teams work at your facility, and as you know, they likely become part of your culture. Early on, we came up with the term 'ambassador' as a way to really enable our clinical team members to become part of the fabric of your organization to best meet the needs of your employee base. As an ambassador, at the same time, we expect our team to hold true to those core values that make up the organization that they come from. We have a very strong culture code and have a high standard of care that our clinical care teams provide to patients. The concept of an ambassador we find very appropriate, and it will continue to be an important part of how we think and behave.

### Ann Hartman, VP Customer Experience Management

*Ann Hartman has been serving as the vice president of customer experience for a number of years, leading clinical ambassadors and client relationship management for the Marathon Health side and will continue in that capacity for the combined organization.*

On each of these customer calls we have been providing data on what our teams have been doing, especially during the COVID-19 response efforts. We have now combined the data across our company. Some health centers may be closed if they are inside of a facility that is currently closed, but many of our health centers remain open and have been throughout these past months. We have been working collaboratively with you and helping to triage patients that have COVID-19 symptoms – with now over 3,500 patients triaged. We have also had a focus on outreach to your employees and their families. We have made over 210,000 outreach calls to check in and see how people are doing during this time. We've had a remarkable response from patients who have really appreciated their providers reaching out. As you know, we have shifted our services to telephonic and virtual care. About 12 percent of visits have leveraged the video component, and 24 percent are in-person. We've been reaching out to also provide awareness of the available resources (how to manage stress, maintaining a healthy diet, exercise, kids, etc.). We have sent over one million emails, with a 23 percent open rate. Across both companies, we have been able to maintain a net promoter score of 90 throughout this COVID-19 response.

On a separate note, every year, Marathon Health has hosted a Customer Forum as a networking opportunity to share best practices and celebrate our customers' success and provide feedback in order to best grow our business and serve our customers. This usually happens in the summer time, however in order to keep everybody healthy and given the constraints, we have decided to cancel this year's Forum. **We have rescheduled the customer forum for October 24-27, 2021** at the Lodge at Spruce Peak in Stowe, VT.

#### **Katie Vicars, Executive Vice President, Client Success**

*Katie Vicars has been serving as the executive vice president for client success on the OurHealth side, and will continue in this role working closely with Ann Hartman in terms of client-facing account management, customer support, and execution.*

We know that many of you are quickly moving to create strategies and plans to bring back your workforce. Many of you are essential businesses and have continued to work during this time. As you continue to think about bringing your employees back into your workspace, if you have not put together a comprehensive plan yet, we are more than willing to help assess your plans, give you feedback, provide clinical support and direction. If you have ideas or questions that you would like to bounce off of your account team, we welcome those discussions. Many of you have moved forward with assessments for our own ambassadors. They will continuously be attesting to their own state of health and ability to work in the office space. We're happy to support you through this process as well. We are learning with you. CDC guidance continues to evolve and change and we are doing our best to stay on top of that and make resources available.

#### **Bev Raymond, VP Clinical Operations**

*Bev Raymond is a nurse practitioner by training and has been serving as the vice president of clinical operations, working closely with the clinical leaders across the Marathon Health team. She will be in a similar capacity as we move forward together to support and drive clinical effectiveness and success across all of our clinical care teams.*

We would like to briefly mention the flu vaccine specifically as our customers begin to think about protecting their employees this coming flu season. We want to stress the **importance of the flu vaccine this year**, as many of you are likely beginning to hear about. There are three key reasons why this is so important. The first is that we can't predict what will happen this fall with the reemergence of COVID-19, and if you add influenza to that in November/December (which typically includes about 500,000 patients hospitalized each flu season), the strain on the healthcare systems would be extensive. Second, on an individual level, is that having influenza will complicate things when diagnosing patients and determining whether they have the flu, COVID-19, etc. and how we approach self-isolation and people being out of work. With this said, it is crucial that as few people as possible get the flu this upcoming season. Last, surrounding immunity, we don't yet have a sense of what it means for somebody to have both influenza and COVID-19. If people have influenza and

are fighting off that disease, it does make them more susceptible to other viruses such as COVID-19. We highly encourage the flu vaccine in order to mitigate this as best we can.

**Terry Layman, MD, Regional Medical Director**

*Dr. Terry Layman is a primary care physician and has been serving as OurHealth's corporate medical director and continues to see patients in one of the health centers in Indianapolis, Indiana.*

We want to recognize that the pandemic is hitting the United States at different times in different parts of the country, and therefore a regional response is required. For this reason, we do not have an all-encompassing reemergence plan, but instead will have location-based plans that are tailored to those carriers. However, there are some general guiding principals that we wanted to make you aware of. Primarily, at the height of the disease, we have been, and will continue to be, restricting our visits to primarily virtual appointments in order to prevent the spread of the disease within the walls of the clinic. As the disease prevalence begins to decrease and we reach a plateau, we will start to open up our clinics to more in-person visits and disease-management visits. As COVID-19 begins to subside, we will open up more in-person visits, such as our registered dietician visits and physical therapy. This will be a phased approach, again depending on your location across the country. There are standard approaches across the network that we also want you to be aware of. First, all of our clinical ambassadors will be wearing masks. There will also be signage requiring patients to wear masks as well and encouraging social distancing and hand hygiene. Our goal, as always, is to best serve our customers and our patients. In order to do so, we will continue to update you with recent developments and information.