

## Purpose:

A framework that aligns *who you're speaking to* (audience), *where you're speaking* (channel), and *how you're speaking* (message) — governed by clear guardrails.





## 1 Framework Overview

The Grid is structured in three dimensions:

- **Audience Segments** (Rows) – Patients, Members, Caregivers, Physicians.
- **Channels** (Columns) – Email, SMS, Portal, Call Center, Paid Digital, Direct Mail.
- **Message Variants** (Cells) – Awareness, Preventive, Condition-Specific, Loyalty.

At the intersections, CMOs can define what personalization is appropriate and effective — and what crosses the line.

## 2 The Grid

Audience	Email	SMS	Portal	Call Center	Paid Digital	Direct Mail
 Patients	Preventive screening reminders; post-visit education	Appointment reminders	Test results; care plan nudges	Nurse navigator follow-ups	Service-line awareness (e.g., ortho ads by ZIP)	Wellness campaigns; community events
 Members	Renewal notices; benefit education	Rx refill alerts; coverage reminders	Claims updates; personalized plan tips	Enrollment help; claims resolution	Plan comparison ads (geo-targeted)	Annual benefits handbook
 Caregivers	Education on care options	Visit reminders for dependents	Proxy access to care journeys	Case manager calls	Awareness campaigns for support services	Resource kits
 Physicians	CME opportunities; referral tools	Urgent updates (network changes)	Provider portal updates	Physician liaison outreach	Specialty growth ads	Referral program materials

## 3

### Guardrails & Governance

Every grid cell is governed by three filters:

- ▶ **Growth:** Does it drive measurable outcomes (appointments, renewals, conversions)?
- ▶ **Impact:** Does it enhance patient/member experience and reduce friction?
- ▶ **Good:** Is it compliant, ethical, and respectful of privacy?

Cells that don't meet all three are either:

- ▶ **Restricted (R):** Not recommended due to compliance or creepiness risk.
- ▶ **Caution (C):** Use with strict oversight (e.g., condition-specific outreach without clear opt-in).
- ▶ **Approved (A):** Safe and effective personalization zone.

## 4

### Example Personalization Journey

Patient Segment: Women ages 40–54 in PCP panel

- ▶ **Email:** Preventive mammogram invitation → compliant, age-based, aligned with guidelines.
- ▶ **SMS:** Reminder 48 hours before appointment → improves attendance.
- ▶ **Portal:** Personalized education about screening importance.
- ▶ **Result:** +28% appointment adherence (based on screening campaign benchmarks, CDC/NIH).

This demonstrates how multi-channel personalization, governed by the grid, drives measurable outcomes while avoiding creepiness.

## 5

### CMO Action Checklist

1. **Map Your Audiences:** Define your core patient/member groups.
2. **Choose Priority Channels:** Start with 2–3 where you already have consent and infrastructure.
3. **Align Message Variants:** Awareness, preventive, condition-specific, loyalty.
4. **Apply GiG Guardrails:** Growth, Impact, Good.
5. **Pilot & Measure:** Start with one service line or population, then scale.