

Network Healthcare Holdings Limited

Investor Day
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Marketing Opportunity Overview

Deepen our understanding of our key segments' values, attitudes and aspiration so as to

- Embed our brands into **patients** lives – make them modern, exciting and relevant
- Work with the **doctors** and **specialists** to drive growth
- Connect with the **local communities** through relevant messaging and through socially relevant projects





Marketing Priorities

- Consolidation of our brands, products and services
- Create and enrich continuous messaging with patients
- Enhancing patient experience within our facilities
- Physician partnership and alignment
- Brand research to gain insights





The Current Reality

- Netcare has enjoyed rapid growth over the past 10 years
- Entrepreneurial mode
- Currently:
 - No cohesive brand strategy (within or across divisions)
 - Applications inconsistent
 - Number of sub brands with limited alignment
 - Competitors have evident branding strategies
- **Consolidation of brand portfolio is required in the form of a Brand Portfolio Strategy**





Overview of current brand application



You're in safe hands



PRETORIA EAST Hospital





Simplification

Permeating Theme



Netcare

Primary Healthcare

Emergency Services

Hospitals
Value-Added Services

Medicross
Primecure
Value-Added Services

Netcare 911
Value-Added Services



Using Consumer Insights to Drive Customer Intimacy

Pros

Cons



- Broader service offering
- Clean, neat comfortable
- Name inspires trust, confidence
- Up-market, stylish, aspirational
- Recognised brand
- Well established
- Excellent reputation

- Hospital identity not known
- Reach out to emerging market
- More elitists
- Logo could be refreshed



- Many services under one roof
- Community based
- Good value for money
- Easy to get an appointment
- See same doctor all the time

- Old fashion/dated/dull colours
- You feel rushed
- Only serve the upper LSM's
- Not marketed
- Confusion with Medi-Clinic





Using Consumer Insights to Drive Customer Intimacy

Pros

Cons



- Affordable consultation
- Close to patients
- Attend to patients quickly
- Staff is friendly
- Prime means your first choice

- Not well marketed
- Not active in the community
- Can be overcrowded
- Buildings are dull



- Quick and efficient
- Superior customer service
- It is the face of Netcare
- High visibility, well branded
- Trusted, reliable, dependable
- Feelings evoked are life saving
- Don't discriminate, person's life

- Perceived as expensive



The Search for Understanding of Our Patients' Needs Continues

QUANTITATIVE STUDY

- Quantify and evaluate perceptions
- Brand character and positioning
- Define brand value drivers

NOVEMBER
2007

BRAND AUDIT

- Branding Opportunity at facility level

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2007



Distinctive Customer Experience Reinforces and Enhances the Brand Image

Customer Insights

Deep Insights on **Needs, Journey, Occasions**

Identify “**moments Of Truth**”

Validate using Various sources

(Source: McKinsey 2007)

Value Proposition

Define Explicitly
Per segment

Communicate Brand Promise that **satisfies All and delights a few**

Execution

Streamline structure
To deliver on promise

Create customer-Centric Talent model and culture

Prescribe interaction For Front-line staff
at critical touch points

Performance Management

Define metrics and **Report performance On customer interaction**

Instill **front-line Problem Solving** to Deliver Distinctive experience

Every Interaction is an Opportunity to Further Understand our Patients

Voice of the Customer/Patient

- Outbound telephonic patient satisfaction survey
 - 📞 resolve patient queries timeously
 - 📞 identify growth opportunities
 - 📞 view real-time results on a CS dashboard
 - 📞 benchmark service levels across the business
- Discharge SMS
 - 📞 sms sent to discharged patients
 - 📞 evaluate customer experience
 - 📞 opportunities to enhance service delivery



Patients Prefer to Service Themselves - Customer Empowerment

- Web-based Pre-admission Facility
 - 🏠 cut down on waiting times at reception
 - 🏠 cut down on administration process
 - 🏠 patient can also register via telephone

- Patient Information Leaflets (next week)
 - 🏠 online comprehensive information library
 - 🏠 information regarding relative treatment of options
 - 🏠 enhancing patients understanding of informed consent





Quality Measures are a Business Imperative

PATIENTS ARE BECOMING DISCERNING

- Clinical Outcomes
 - Re-assure patients of quality of care at our facilities
 - Broadly market clinical outcomes – re-assurance and brand leadership





Enhanced differentiation through new products and services

National products will increase our relationship with patients

- Cosmetic Surgery Clinic
 - Increasing self pay market

- Women wellness clinic (menopause)
 - People live longer (women average age of 85yrs)
 - Women generally shown to be proactive in the management of their own and families health





In Summary

- Increase relationship with patients based on deep insights
- Market to segments with the correct products
- Develop relevant and consistent brand messages
- Publish work around quality outcomes
- Increase awareness on our Corporate Social Responsibility initiatives
- Continuous brand health tracking study

