

HVDMA

sw sizzle reel
(FPO)

shadowworks

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we bring **brands** to life in the **digital space**

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information design

social media activations

visual identity kits

sales tools

brand films

virtual environments

interactive pdfs

brand guidelines

sell sheets

event media

online learning modules

brand guidelines

sell sheets

ppt templates

we bring brands to life in the digital space

html5 banners

in-store displays

motion design

stadium signage

broadcast

table tents

presentation systems

on-demand media

live events

motion identity toolkits

virtualized presentations

product demonstrations

digital ooh

pitch collateral

interactive design

sizzle reels

trade show displays





we bring brands to life in the digital space

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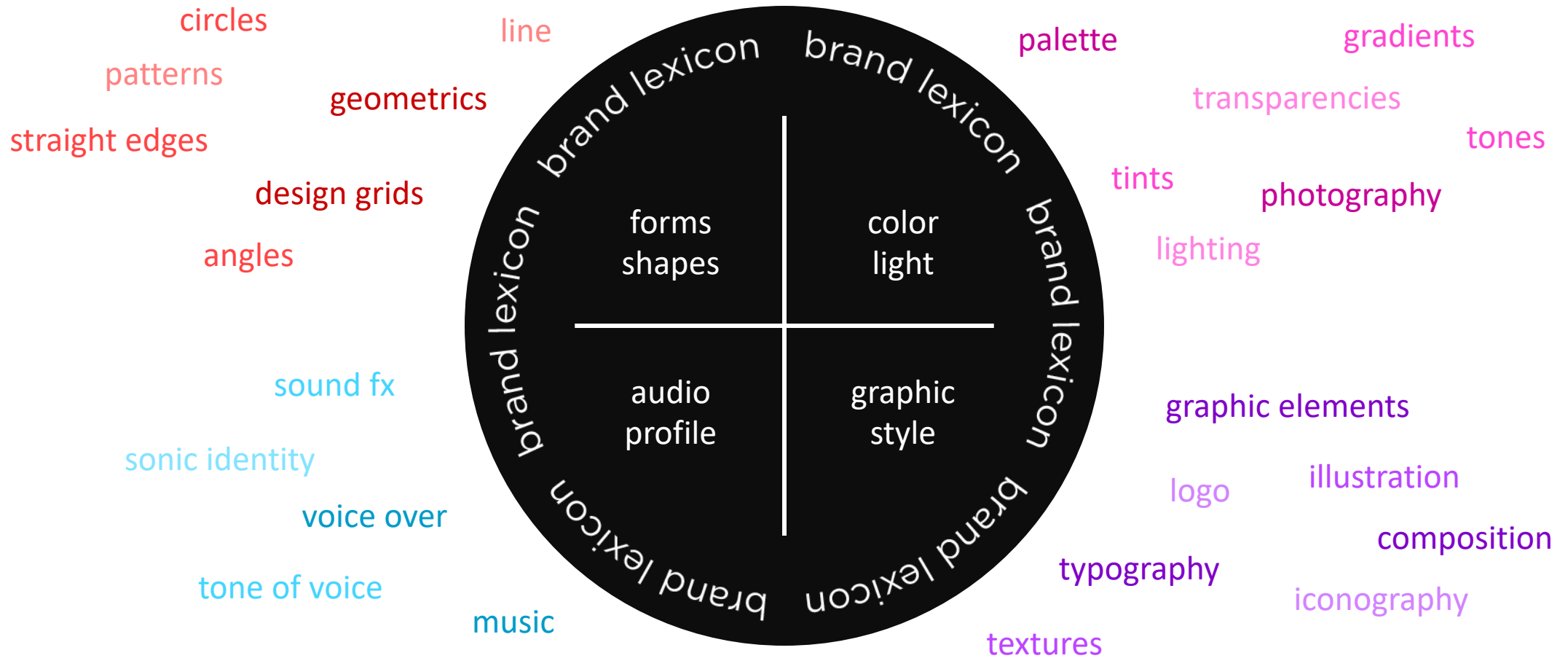
brand
strategy

brand
guidelines

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logo

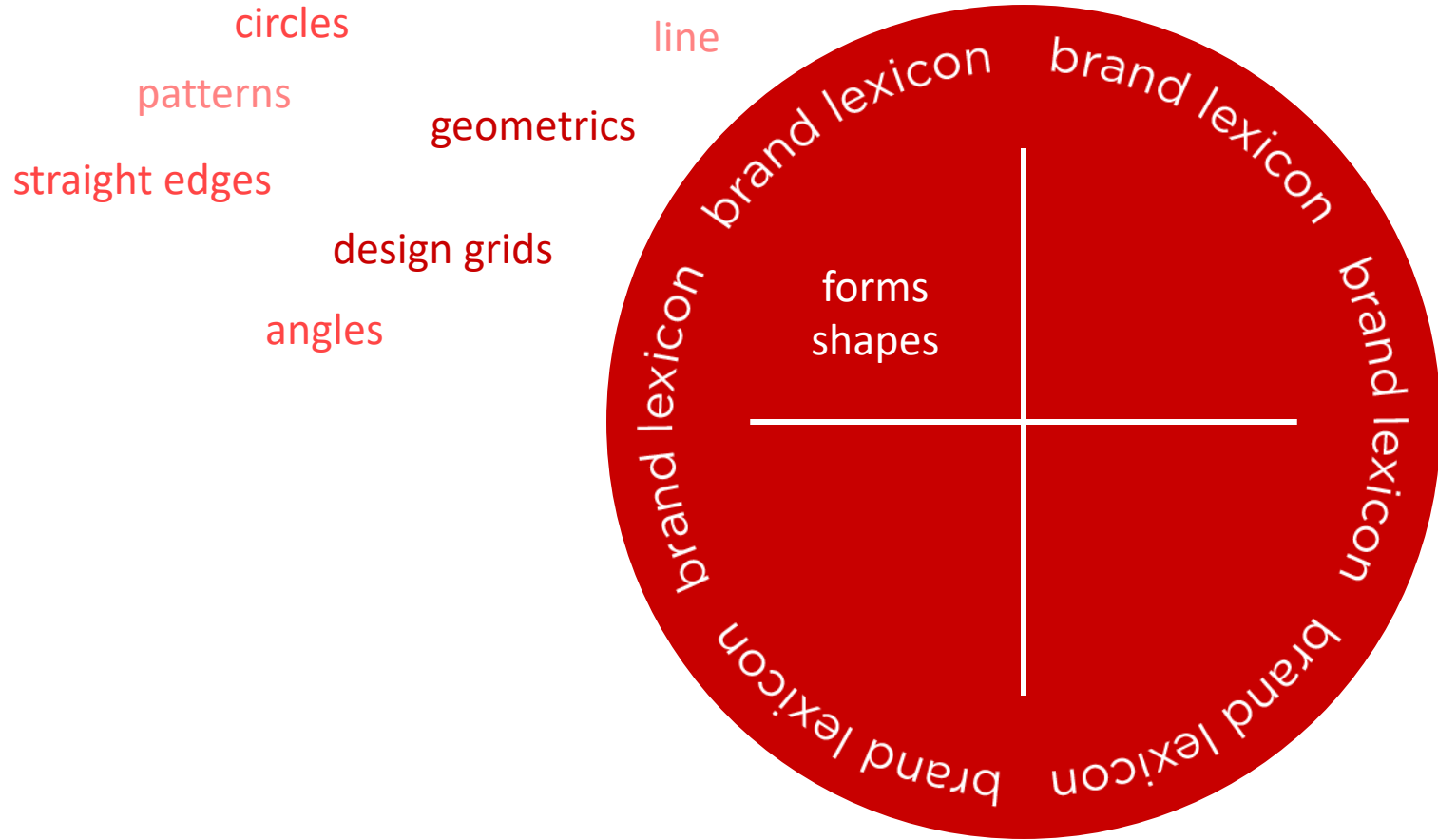


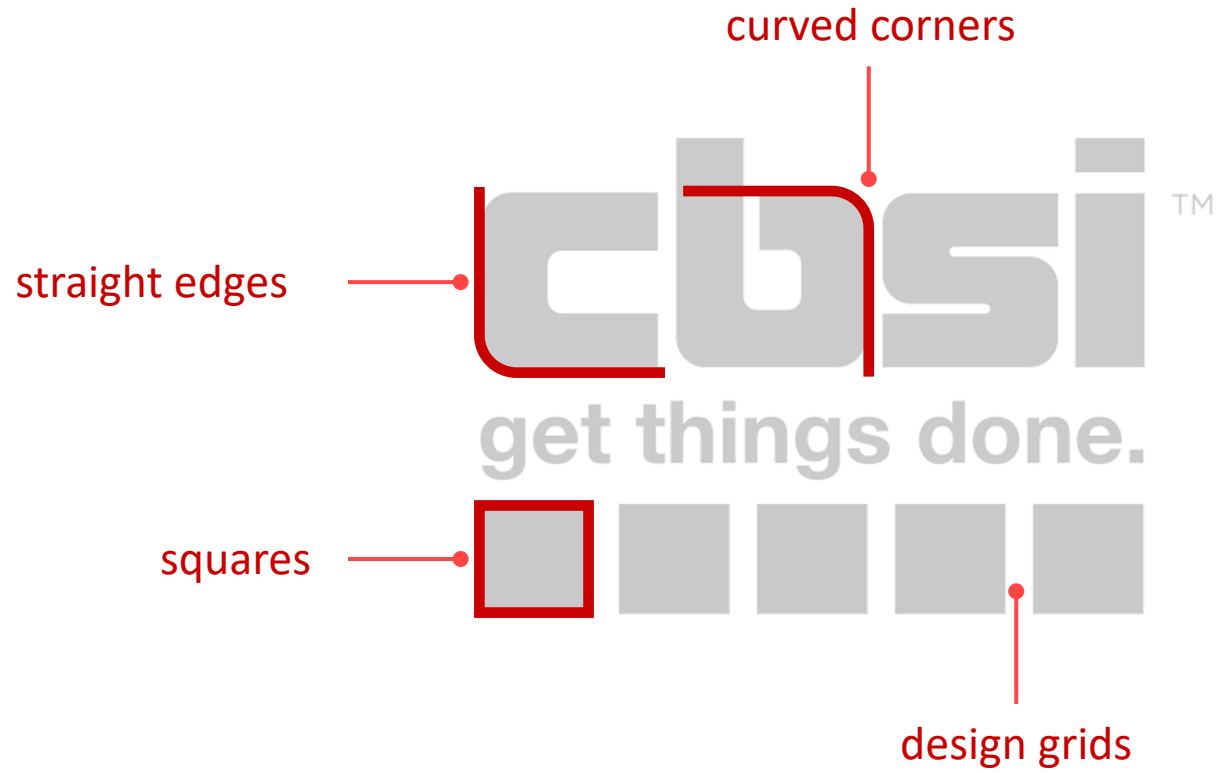
primary colors

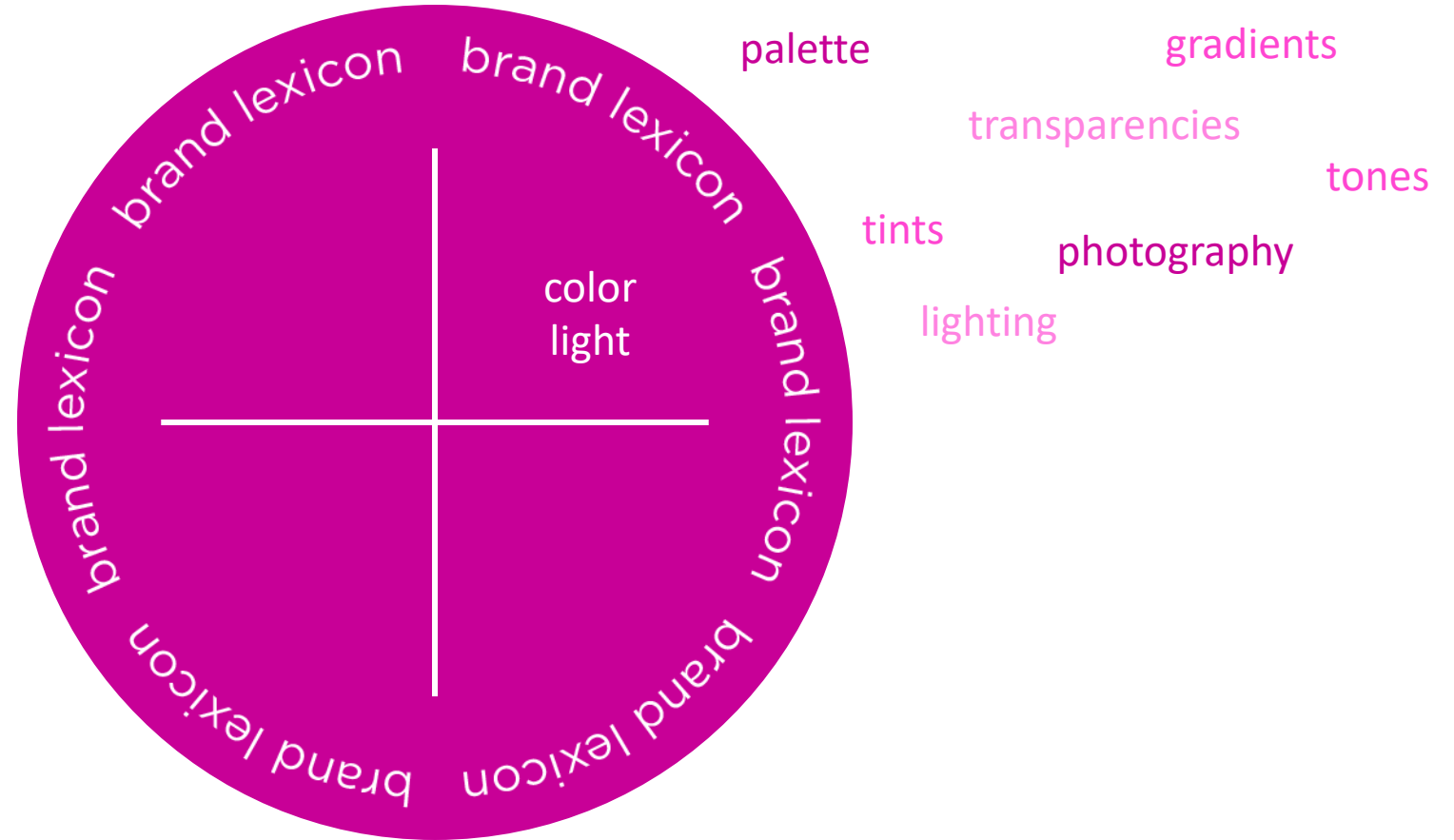


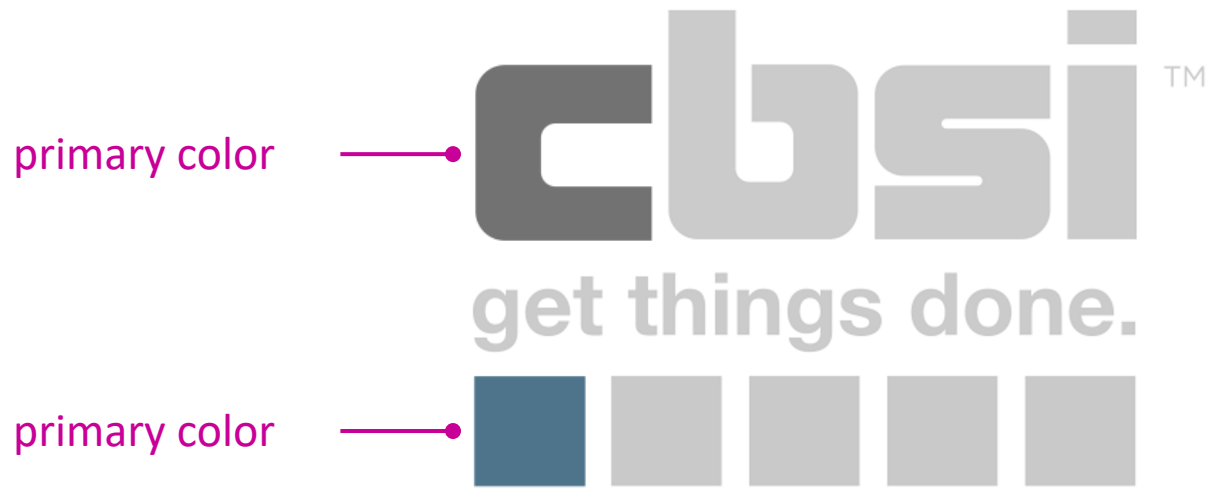
secondary colors



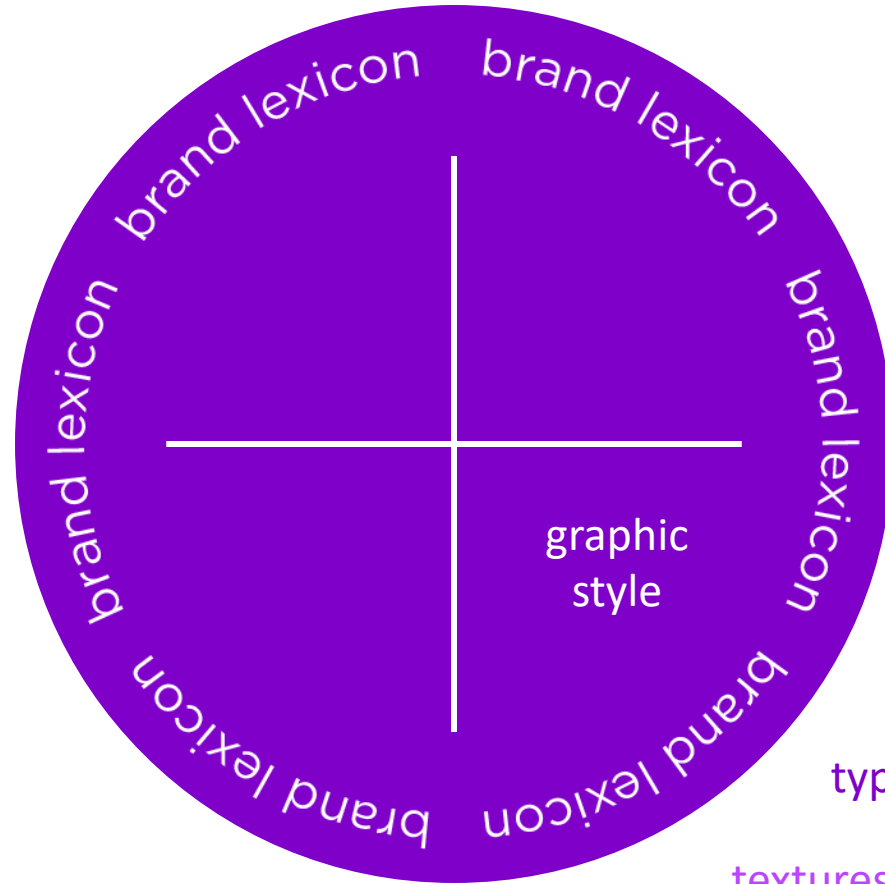








secondary colors



graphic elements

logo

illustration

composition

typography

iconography

textures



graphic elements

Slide 1: cbsi™ get things done. ■■■■ cbsi Company Overview October, 2018

graphic elements

Slide 2: cbsi™ get things done. ■■■■ cbsi Evolves with Industry Advancement cbsiservices.com

- cbsi has grown from its origins as an insurance broker into:
 - Innovator
 - Product Development Specialist
 - Full Service Management Agency – Driven by Data Intelligence
 - Compliance Officer
 - Customer Experience Expert

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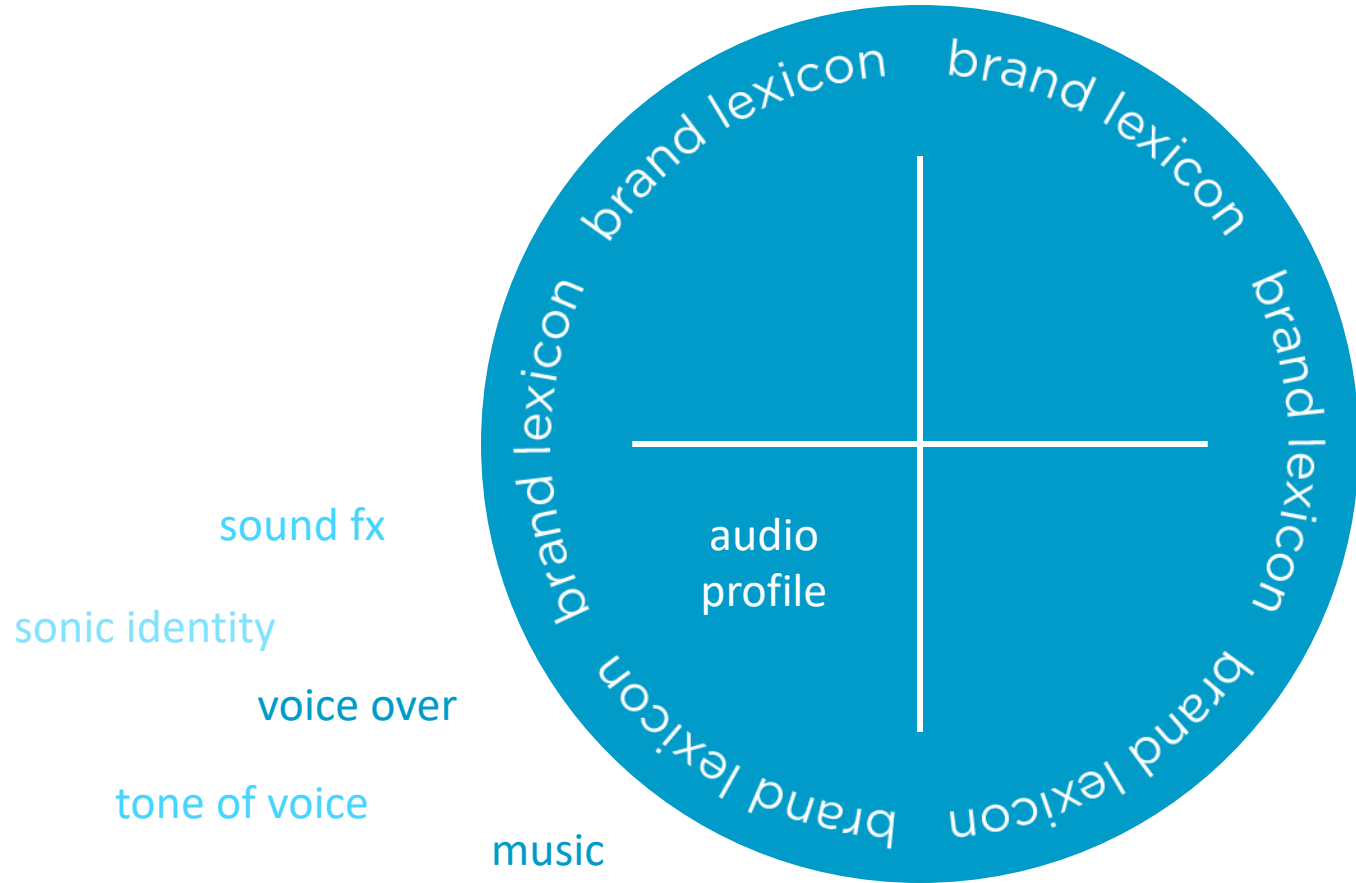
graphic elements

Slide 3: cbsi™ get things done. ■■■■ Hub & Spoke Infrastructure cbsiservices.com

- A Hub & Spoke customer servicing model is employed to accommodate client requirements, infrastructures and budgets
- Benefits vary in complexity and delivery methodology
- Delivery is seamless to end users with customer identification determined via webservice call to the platform

- HUB: cbsi at the center
- SPOKES:
 - Contracted to deliver customer and claim services
 - TPAs
 - Customer Service Centers
 - Marketing Agencies
 - Technology Providers

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cbsi™

company overview video

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scripting

Consumers will never see commercials about us on TV. They'll never see us on billboards or receive digital ads regarding our services. Yet in practically every household, and inside nearly every wallet across the country, our presence is felt.

We're cbsi, the largest global provider of transaction account benefits. While our products are everywhere and ever present in the hands of consumers, most will never know we're the protection behind their purchases.

This didn't happen overnight. We've spent years accumulating knowledge, innovating and developing in our industry. Beginning in 1972, we set in motion the ability for insurance to be provided **automatically** on everyday purchases, like travel and retail, all the while improving customer relationships for account sponsors.

Our evolution with our market grew from our origins as an insurance producer into...

...an innovator; incorporating new technologies into offerings such as the patented cbsi Benefit Select platform,...

... product development specialists; using those technologies to differentiate and expand upon coverage options...

...a full-service management agency; mining, analyzing, interpreting, and reporting data to address business objectives,...

...compliance officers; monitoring programs to provide real time feedback,...

...lastly your customer experience experts; partnering with you to make sure your customers receive the benefits they want, when they want them, and how they need them.

As your adjunct team, we share your focus on the bottom line, and maximizing your return on investment. We work to ensure you achieve your goals, because we understand that the measure of our success, is your success.

At this point you may be wondering why benefits matter to your business? Three reasons: acquisitions, usage, and retention.

Acquisitions, because benefits are a relatively low-cost way of differentiating offerings.

Usage, to encourage the behavior you want from your customers, because informed consumers tend to leverage the benefits you provide.

And finally, retention, because you need to protect your customer base. The cost to acquire a new customer greatly exceeds the cost of retaining an existing one. Benefits are a proven method to increase both customer engagement, and positive customer experiences.

However, when it comes to benefits, one size does not fit all. That is why at cbsi we utilize a hub and spoke servicing model to accommodate differing requirements, infrastructures, and budgets.

With our accumulated knowledge, and a proven record of accomplishment in developing products and client relationships we possess the skills to develop, underwrite, manage and service your business needs.

It is this experience, and our ability to adapt, evolve, and innovate within the market, that has made cbsi an industry leader. We maintain direct relationships with the top ten transaction account providers, and over 1,200 financial institutions.


Whether your customers are taking an exotic trip, buying the latest gaming system or using their phone to catch a ride, cbsi provides the protection behind their purchases.

Because at cbsi, we get things done!

defining elements


cbsi Design Elements 02.26.19

Color Palette




Baseline brand colors.

Spectrum



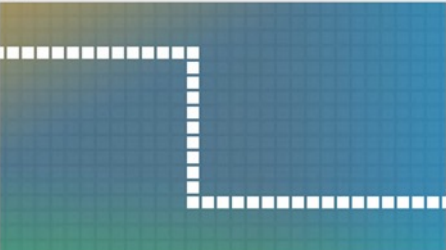
When using a baseline color as a foundation we can leverage and alternate to form spectrums. These can be animated slowly over time to bring energy to the frame.

Grid



Grid texture overlay allows sense of depth.






Path



Finally, the path, which we build atop the grid allows for a visual narrative device.

cbsi Iconography 02.26.19

The cbsi iconography denotes the five current ways in which we have grown from our origins as an insurance broker. They are as follows:

				
INNOVATION	PRODUCT DEVELOPMENT	INTELLIGENCE	COMPLIANCE	CUSTOMER EXPERIENCE
<p>How we continuously improve our products, and how we incorporate new technologies into our offerings</p>	<p>How we extend the use of current and new technologies into new spaces and for new needs.</p>	<p>How we use our years of experience in mining, analyzing, interpreting, and reporting data</p>	<p>How we monitor our programs and provide real time security and risk feedback.</p>	<p>How we ensure consumers receive the benefits they want when they want them, and how they need them.</p>

01



Super: A QUIET BUT EXCEPTIONAL PRESENCE. Type animates in and then white squares begin to animate as a line to follow. Background color gradations change over time slowly.

Music Starts

02



Square line continues taking us past slow-motion shots of people.

Consumers will never see commercials about us on TV. They'll never see us on billboards or read our ads in magazines.

03



Camera pulls out to reveal aerial fly-over of houses being populated with many squares.

Yet in every household, and inside nearly every wallet across the country, our presence is felt.

04



Transition to animate on logo.

We're CBSI, the largest global provider of transaction account benefits.

05



Camera follows square line to right as we pan past clips of consumers.

While our products are everywhere and ever present in the hands of consumers,

06



Continue pan right.

most of them will never know we're the power behind their purchases.

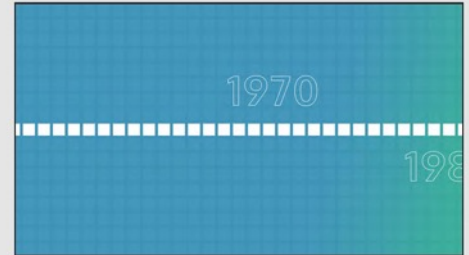
07



Square line animates to reveal logo before collapsing into a single square.

But this didn't happen overnight.

08



Single square expands to become timeline and camera pans right.

The years spent accumulating knowledge, innovating and evolving in our industry, has allowed our expertise to grow over time.



cbsi animatic

for reference only – only 30 secs to be played

591-CBSI-OVERVIEW

Animatic v1

Runtime: ~4:12

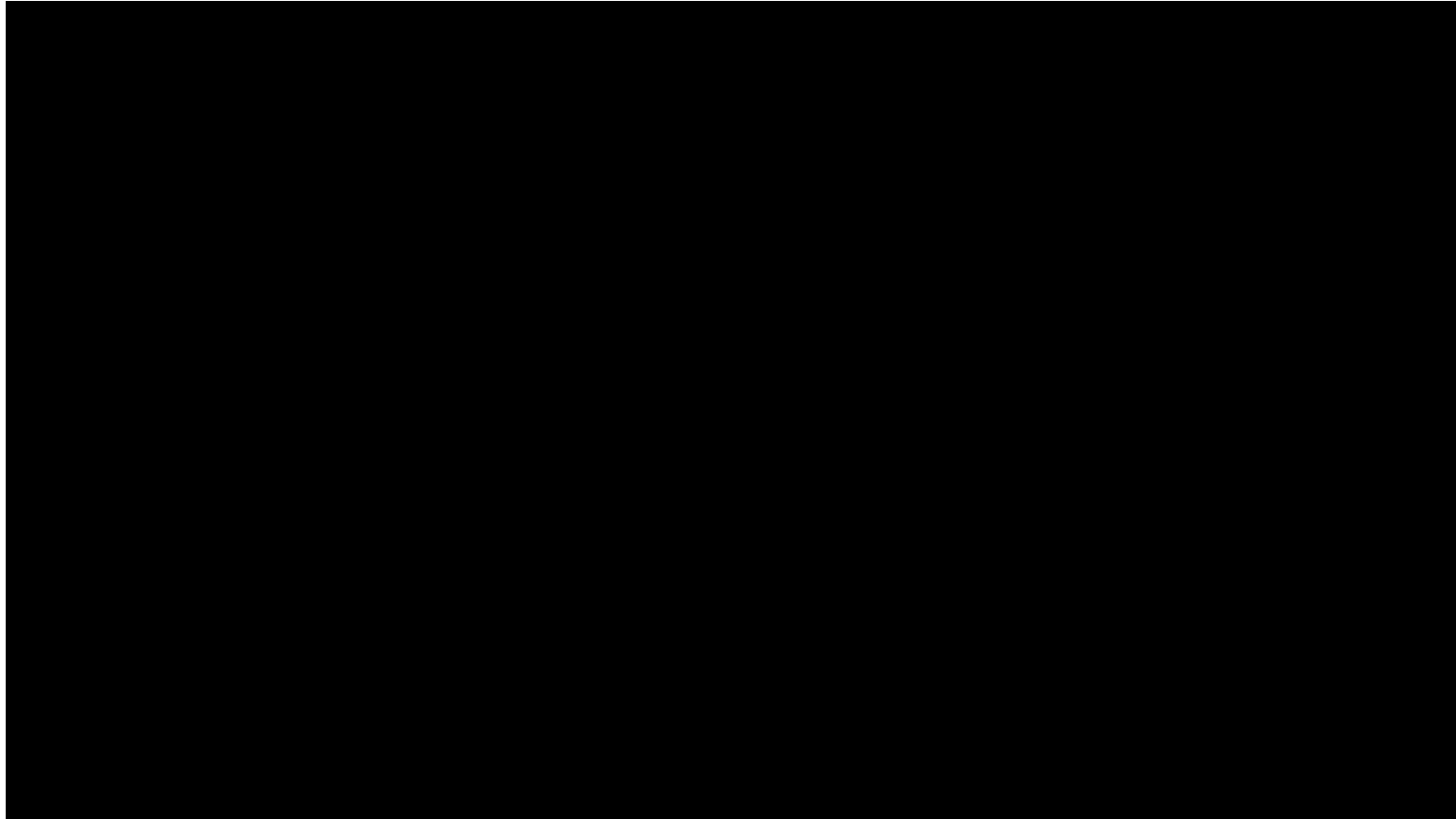
Notes:

Scratch VO Track. Five music tracks included for review.

These are not edited or mixed, expect “hiccups” in music here and there.

Purpose of this animatic is to establish time and place of pictures and sound to discuss any changes, such as cutting of scenes and/or script, prior to full animation commences.


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cbsi video
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cbsi
presentation



cbsi Company Overview



October, 2018

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RFP Presentation

November 2020



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cbsi Evolves with Industry Advancement cbsiservices.com

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cbsi Evolves with Industry Advancement

cbsi has grown from its origins as an insurance producer, into a provider of:

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Industry Advancement – Innovation

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- BenefitsSelect™ Patent
- Benefits Registration Platform
- Benefit Wallet
- BenefitConnect
- eClaims
- Trigger

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cbsi Evolves with Industry Advancement

cbsi has grown from its origins as an insurance producer, into a provider of:

- INNOVATION
 - BenefitSelectSM Patent
 - Benefits Registration Platform
 - Benefit Wallet
 - BenefitConnect
 - eClaims
 - Trigger
- PRODUCT DEVELOPMENT
- INTELLIGENCE
- COMPLIANCE
- CUSTOMER EXPERIENCE

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10

cbsi
get things done.

Hub & Spoke Infrastructure

cbsiservices.com

- A Hub & Spoke customer servicing model is employed to accommodate client requirements, infrastructures and budgets
- Benefits vary in complexity and delivery methodology
- Delivery is seamless to end users with customer identification determined via webservice call to the platform



- HUB: cbsi at the center
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Hub & Spoke Infrastructure

A Hub & Spoke customer servicing model is employed to accommodate client requirements, infrastructures and budgets

Benefits vary in complexity and delivery methodology

Delivery is seamless to end users with customer identification determined via webservice call to the platform

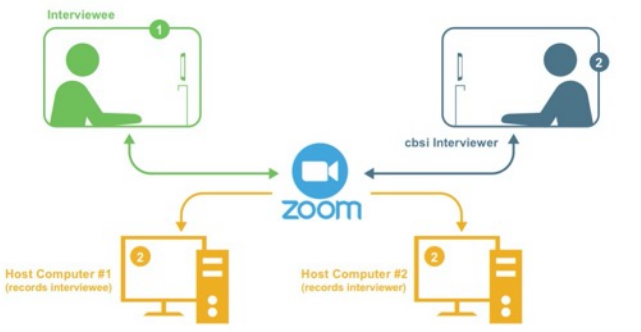
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BEST PRACTICES AND RECOMMENDATIONS FOR ZOOM VIDEO INTERVIEWS

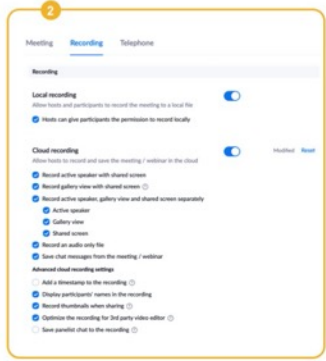


ZOOM Meeting Recording Recommendations



We found that mobile phones yield the best image quality. If not available, webcams will work – but expect mixed quality depending on camera specifications.

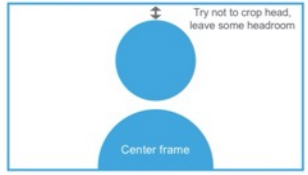
1. Recommend using most up-to-date mobile phone with ZOOM app and phone mount or stander. Phone should be positioned at eye level
2. Host computers will be operated by the cbsi interviewer from their location
To ensure a maximum quality capture:
 - 1) Match ZOOM recording settings on Host Computers (see image to right)
 - 2) Choose view in "full screen"
 - 3) Choose "hide self" on your screen
 - 4) Choose "speaker view" and "pin source"
 - 5) Press Record
 - 6) Conduct interview
3. Send local files created on each host computer with ZOOM via ftp (link XYZ.com here).
These files will include following:
 - Audio Record folder
 - audio_only.m4a
 - playback.m3u
 - zoom_0.mp4

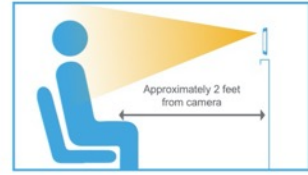


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Virtual Interview Best Practices

FRAMING





EQUIPMENT SET UP

1. Webcam/smartphone positioned eyelevel.
2. Sit in armless chair or stool to reduce slouching and positioning throughout.
3. Lighting should be set behind the camera (in front of you) and not behind you
4. Have a printed reference of pre-approved questions and suggested answers where possible.
5. Consider USB microphone to enhance audio capture (though participants may not have this.)
6. Background environments should be free of clutter.
7. No direct sun light on participants or within shot.

THE INTERVIEW

1. Have a question you want answered or a central issue in mind before the interview, your theme question. This can be sent ahead of the interview, to allow the interviewee time to become comfortable with what is being asked.
2. Have the interviewee state their name and title at the beginning of the interview. This may or may not be used, but it prepares the person being interviewed for their role in this interaction. This also helps in cataloging interviews later.
3. Ask the interviewee to try to include any questions in their answer. This ensures the person is addressing a specific topic, minimizing the need to have the interviewer on camera. When editing, you want to have less of the interviewer on camera, and more of the subject.
4. Ask open ended questions to minimize yes and no answers.
5. Begin the interview by asking the interviewee's background in the field, and follow up with the theme question. This is the header/overarching theme of the interview. (BEGINNING)
6. The majority of the interview will be exploring and getting details on this theme. How? Ask for more detail on the initial response. Pose a contrasting or contradictory perspective on the question you want answered. Try to approach the topic from different angles to get a complete response. This keeps the interview interesting. (MIDDLE)
7. Have a "final takeaway" question or a "final analysis" question. This is the bookend to your stated theme, and it should be a conclusion which encapsulates the response to the question posed, or proposes a "change" or new way of thinking on the subject. (END)

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case studies

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Dairyland[®]

motion identity toolkit

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Motion guidelines

Examples and best practice

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live event

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HVDMA
vw video
for reference only



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HVDMA

ZTE

trade show displays

shadowworks

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zte video
for reference only



shadowWorks

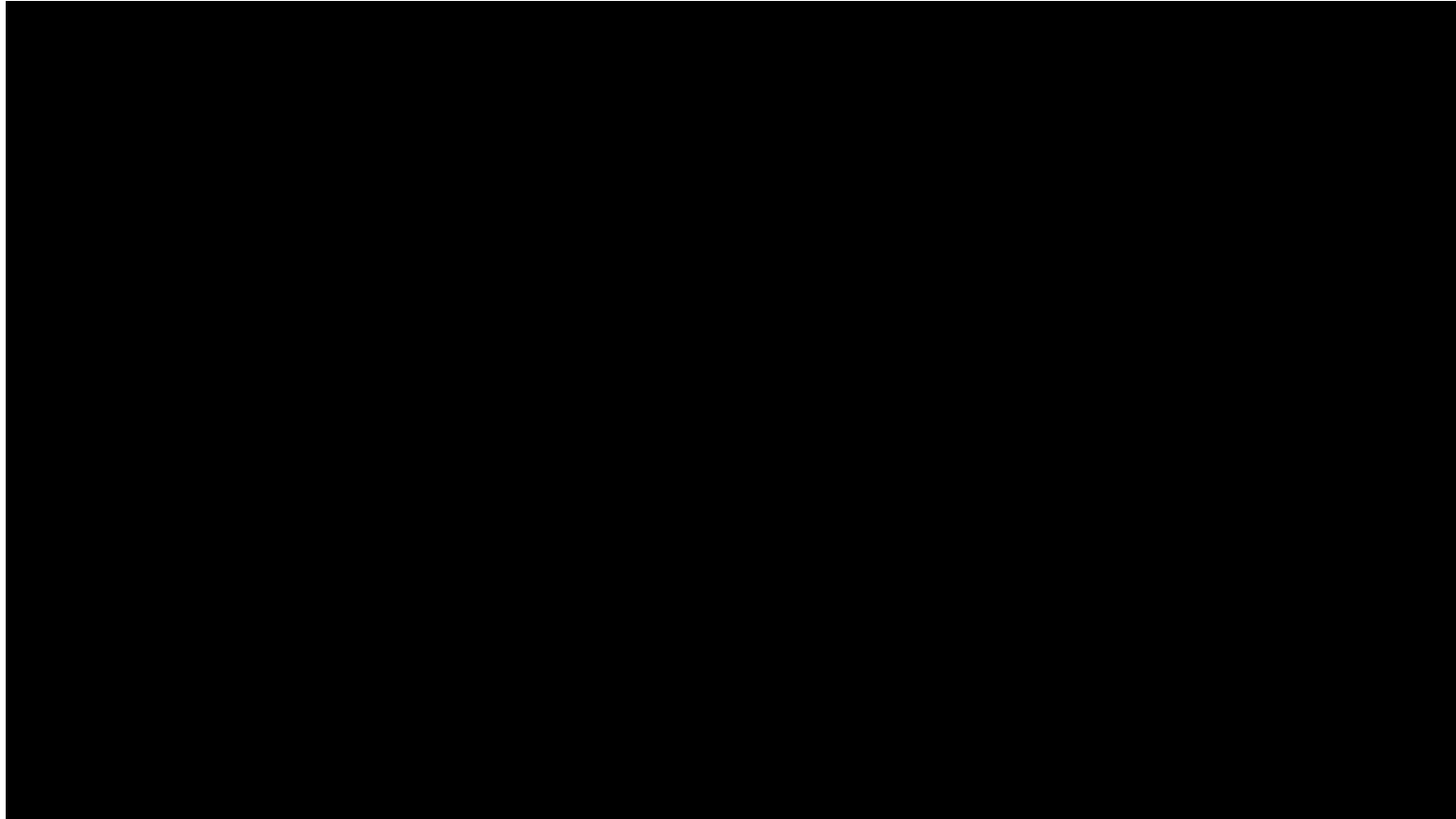
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ABSOLUT.[®]

social media

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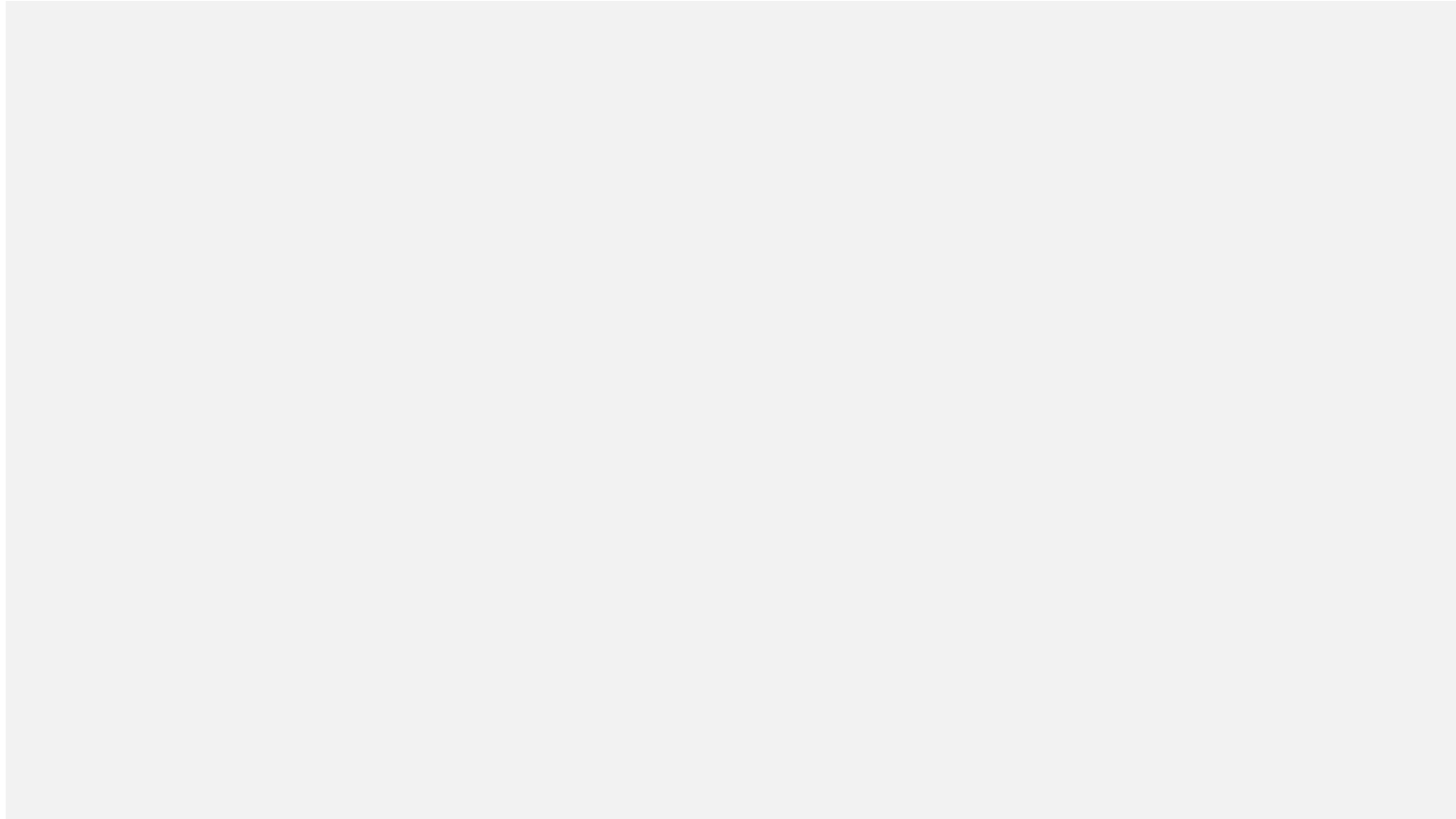
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product demonstration

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clear video
for reference only



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digital out-of-home

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malibu video
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shadowWorks

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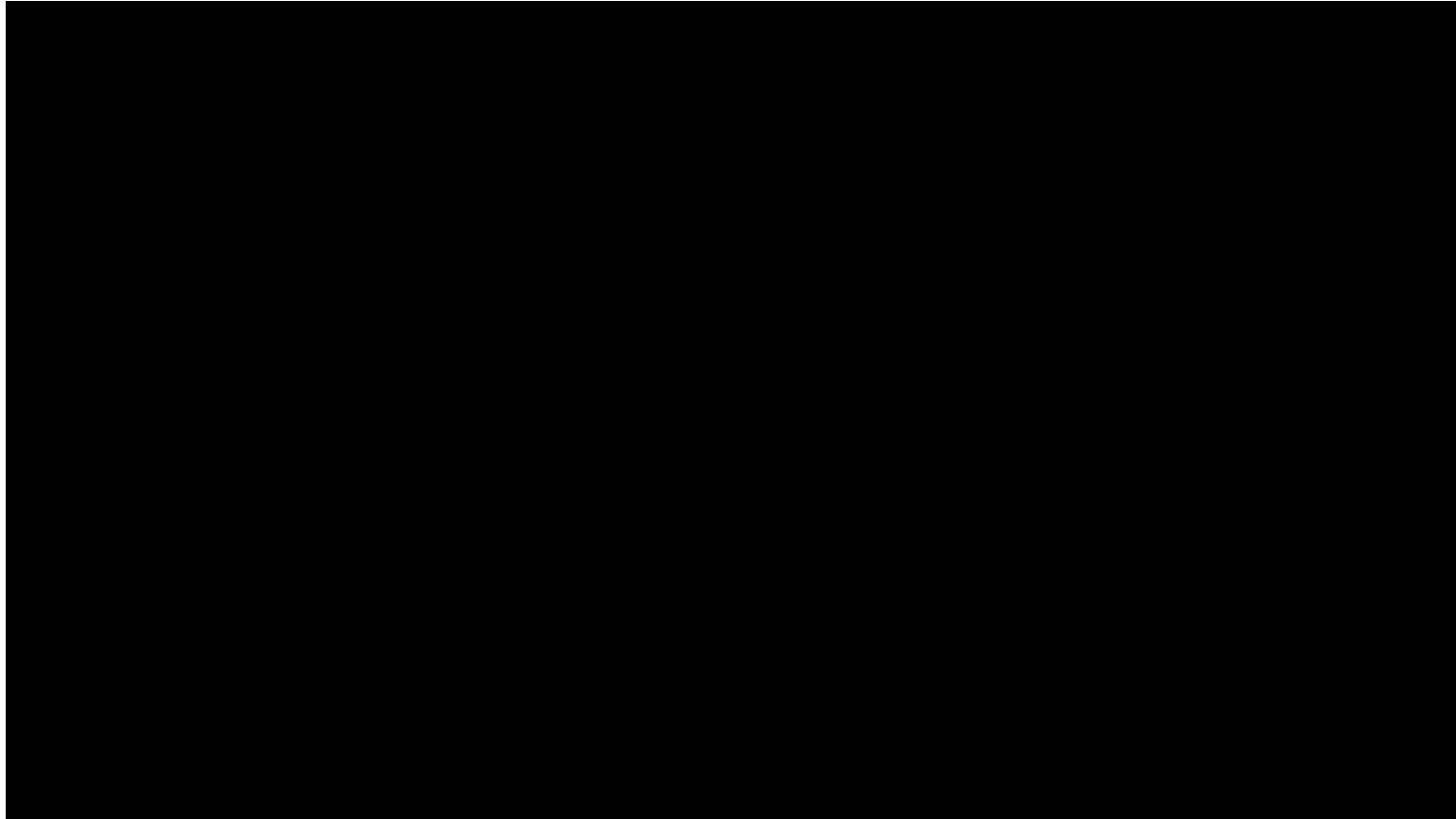


**WEBER
SHANDWICK**

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questions and answers

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