



## **GreenBook Health® Reference Certification**

*An Advertiser Expertise and Customer Satisfaction Certification Program*

### **1. Overview**

GreenBook Health (GBHealth) advertisers may list themselves in any number of the specific service categories offered in the GBHealth online sourcing guide. To help advertisers illustrate their areas of deepest expertise, and stand out in a compelling way, GBHealth created the GreenBook Health Reference Certification Program.

For each service category in which advertisers wish to earn the Reference Certification icon, the advertiser submits to GBHealth several client references, both general and specific to the category. These references must be willing to verify to GBHealth the expertise of the advertiser, as detailed in the application process below.

If the client references offer positive, supplemental comments, GBHealth will request permission to publish those comments anonymously. If the client agrees, GBHealth will then publish these comments as well as immediately email the advertiser that new information has been added to their listing on GBHealth. *At no time is a client name ever published.* GBHealth stands as a neutral third party that has checked the references and collected the client comments. This allows users of the GBHealth site to act on the information with confidence, while advertisers never have to publicly disclose client data.

It is also important to understand that no *negative information is ever published.* If GBHealth cannot obtain the required references, or if the client offers negative comments, the advertiser has the option to withdraw its Reference Certification application at any time.

### **2. Application Process**

The Reference Certification icon is issued on a category basis. To apply, a company must meet two criteria:

- It must be a current advertiser in GBHealth by having paid for at least a base

- listing in the guide.
- It must currently be listed under the service category to which the Reference Certification application pertains. A Reference Certification must always be associated with a service category listing.

A company meeting the above two criteria may apply for Reference Certification by completing the application form. A separate form must be completed by each service category for which the company seeks Certification.

### **3. Reference Certification Levels**

There are currently two forms of Reference Certification: standard and provisional.

The *standard* Certification is intended for all companies with significant healthcare experience that meet GBHealth basic Certification requirements.

The *provisional* Certification is for established companies that are new to the healthcare industry, and newly established firms whose principals have demonstrable healthcare industry expertise. The provisional Certification is good for only one year, after which it is expected that the company will be able to meet standard requirements.

### **4. Certification Process**

Once a completed application form and payment are received, it is referred to a GBHealth Certification specialist.

The Certification specialist will first confirm that the company is currently listed in the GBHealth service categories to which the application pertains. If not, it is returned to the company for resolution of this issue, and the application is assigned the status of “exception”.

The specialist will then evaluate the application and confirm that it is properly classified as either a standard or provisional application. The company will be notified of any change made to the classification, and will have the opportunity to withdraw the application if not satisfied with the re-classification. In such cases, the application status will be assigned the status of “withdrawn”.

The Certification specialist will evaluate the application and determine if it is a 4a, 4b, or 4c application, which determines the nature and type of Certification performed.

The three Certification processes are described below:

**4a. Standard** – The applicant provides two (2) general references that can attest to its general expertise in healthcare marketing, and one (1) reference for which the company has completed a project within the past 12 months that is directly relevant to the GBHealth service category for which it is seeking Reference Certification. *It is important to note that the same general references can be used repeatedly if the company is applying for Certification in multiple GBHealth categories.*

For each reference provided by the applicant company, the Certification specialist will place up to three phone calls, no more than one week apart. If the Certification specialist encounters voicemail, the specialist will leave a message that includes a call-back number, an email address and a reference number. The reference number will assist other Certification specialists in completing the reference check if the primary Certification specialist is not available for any reason.

A log is maintained of the date, time and outcome of each call.

If three phone calls do not yield a response from the reference, the Certification specialist will send two emails (if an email address for the reference has been provided), no more than one week apart. The email will describe the purpose of the contact, the name of the applicant company, and a return phone number and reference number, in addition to a return email address.

A log is maintained of the date and time of each email message.

If the reference responds to one of these contacts, but the reference check is not completed for any reason, the Certification specialist will make additional calls or send additional emails as necessary to try to complete the check. If these additional contacts result in “telephone tag”, the specialist may declare the reference “unresolved” and cease further attempts at contact.

If a reference has not responded at all to any of these five contacts, the reference is also declared “unresolved.” When an unresolved reference situation occurs, GBHealth will contact the applicant company and ask for an alternate reference name (which can be at the same company or a different company). If the applicant company cannot furnish an alternate contact, or if the applicant company elects not to pursue Reference Certification for the particular service category, the application will be changed from an “active” to a “withdrawn” status.

**4b. Alternate Standard Process** – GBHealth understands that clients may be difficult to

reach for purposes of completing the Certification process. For this reason, GBHealth will accept email or regular mail references for a company (i.e. two general references that can attest to its general expertise in healthcare marketing, and one reference for which the company has completed a project directly relevant to the GBHealth service category for which it is seeking Reference Certification.) that are obtained by the applicant, provided:

- They are sent direct to GBHealth by the reference either on company letterhead or through the company's email service (references received from home or personal email addresses cannot be accepted).
- The reference letter or email addresses the key Certification elements described in the Work and Satisfaction Certification section below.

**4c. Provisional Certification Process** -- In lieu of client references, the company may supply a package of any three of the following qualifying credentials that in combination clearly attest to the company's (or the company principal's) knowledge and expertise relative to the category.

The provisional Certification is for established companies that are new to the healthcare industry, and newly established firms whose principals have demonstrable healthcare industry expertise.

An acceptable reference package is comprised of *any three* of the following items:

- A single client that verifies the company has undertaken and to date has successfully performed on, a particularly large project for the client with annualized billings in excess of \$50,000
- A single client that verifies the company has successfully performed at least three separate projects of the same general nature for the company within the last 12 months
- Proof of current membership by the company or one or more of its principals in at least two national organizations involved with any aspect of healthcare marketing
- Commercially published (defined as published by an independent third-party whose primary business is publishing, whether in print or online) articles, papers or books related to healthcare marketing by a company principal, provided that person is actively involved with the company at the time of application and is listed as a company principal on the company Web site or in printed company literature
- For any organization that can demonstrate (through incorporation papers or other similar governmental filing) that it has been in business for less than 18 months, a resume from one or more company principals demonstrating 15 or more years in healthcare marketing-related jobs

- Proof of participation on the part of one or more company principals as a speaker on a topic relating to healthcare marketing at any national conference or trade show (regional shows may be acceptable at the discretion of GBHealth)
- Letters from three individuals established in the healthcare marketing industry (“established” means holding significant positions in leading industry companies (whether on the client or vendor side), relevant academic institutions or regulatory/oversight bodies) attesting to the specific expertise of a company principal relative to any aspect of healthcare marketing.

GBHealth Certification specialists will accept or reject the submitted references as acceptable or unacceptable in their sole discretion. In the case of unacceptable references, GBHealth will ask the applicant company to provide alternate references. If the applicant company cannot furnish alternate references, or if the applicant company elects not to pursue Reference Certification for the particular service category, the application will be changed from an “active” to a “withdrawn” status.

If the company successfully completes this provisional Certification process once, it is applicable to all service categories for which it applies and pays the applicable fee. Provisional Certification is good for only one year from the date Reference Certification was originally granted, after which it is expected that the company will be able to meet standard Reference Certification requirements. Provisional applications for additional service categories, whenever submitted, will all expire on the same date.

## ***5. Work and Satisfaction Certification***

For type 4a Certifications, the Certification specialist will confirm by telephone or email:

- That the reference is/was a client of the company within the past 12 months
- That for the two general references, the client has purchased products/services related to healthcare marketing from the company within the past 24 months
- That for the category-specific reference, the reference did procure products/services from the company that were relevant to the category
- That for all references the work was conducted by the company largely as promised (in terms of timely completion and final cost)
- That for all references the client was satisfied with the finished product
- That for all references the client would consider utilizing the company again for future work of a similar nature

In addition, supplemental comments will be solicited from the reference.

For type 4b Certifications, the submitted letters or emails must address the above

items, though no specific format is required.

For type 4c Certifications, the Certification specialist will contact references by mail or email, as well as review submitted materials, as appropriate. In the case of both direct contact and review of submitted materials, the assessment to be made by the Certification specialist is that, in the aggregate, the applicant company has demonstrated extensive experience, provided thought leadership, or demonstrates subject matter expertise relevant to the service category. The Certification specialist must feel confident that it is only unusual or special circumstances (in particular, that the company has relatively short business history, or is a well established firm with transferable skills new to the healthcare industry) that prevent the company from earning Reference Certification under the 4a process.

## ***6. Length of Certification***

A standard Certification credential, once earned, is good for three years without re-Certification. The exception is that if the company is acquired, re-Certification must take place no less than 12 and no more than 18 months from the date of acquisition. If the credential expires during this re-Certification timeframe, the expiration date takes precedence over the re-qualification time window.

In the fourth year, the company must submit new references, and the process begins again.

For provisional Certifications, the Reference Certification is good for one year only. After that time, the company must re-apply and meet standard requirements to maintain its Reference Certification. Once a company has held a provisional Certification in a service category, and that provisional Certification expires, it cannot apply for provisional Certification in that service category again.

## ***7. Customer Comments***

For type 4a and 4b Certifications, if one or more references provide positive supplemental comments about the work of applicant company, they will be handled as follows:

- The Certification specialists will collect all positive comments made by all references (the assumption is that someone supplying a positive reference would not supply a negative comment)
- The comments will be edited to GBHealth standard for style and length

- All comments will be de-identified as to source
- Comments will be posted to the applicant’s listing and the applicant will be emailed within 24 hours that new information has been added to their listing

If desired, the applicant company may elect to remove these comments in its GBHealth listing. However, it is important to note that comments will only be published on an “all or none” basis; applicant companies may not select only certain comments for publication. The purpose of this rule is to provide users of the GBHealth site with the fullest possible insight into the applicant company’s work and client relationships.

*In no case are client names or other identifying information ever published on the GBHealth site, even if requested by the applicant company and the reference. This is to maintain consistency and fairness in all published comments.*

## **8. Negative Information**

GBHealth recognizes that few companies have 100% successful client experiences on every single project. That’s why GBHealth will work with the applicant company to achieve successful Certifications whenever possible. This includes going back to the applicant company for additional references if the initial references for any reason cannot supply unqualified positive references. As long as the applicant company ultimately supplies three positive references, the existence of negative references is not considered in the Certification process.

Further, *GBHealth never publishes negative information about applicant companies.* The purpose of Reference Certification is not to create groups of good and bad companies. Rather, Reference Certification seeks simply to highlight companies with demonstrated expertise and satisfied clients. If GBHealth is unable to obtain three positive references out of a maximum of six the applicant company may submit, the application is automatically classified as “cancelled”.

If a company achieves Reference Certification in one service category, but is unable to achieve it in one or more other categories, this has no bearing on the successful Certification as GBHealth provides Certification only at the service category level, and looks at each Certification independently.

## **9. Reference Certification Fees**

Any company meeting the requirements of Section 2 may apply for a Reference

Certification in one or more service categories. Application fees are shown on the current GBHealth rate card.

Discounts are available for application in multiple categories.

A standard Certification, once earned, has a three-year life. However, a fee is required each year for continued publication of the Reference Certification icon. If the fee is not paid in any year during the life of the Certification, the Certification is considered cancelled. If the company wishes for the Certification to appear again, it must re-apply and submit new references.

A provisional Certification is good for only one year. After that, the company must supply references as necessary to qualify for standard Certification.

### ***10. Refunds of Application Fees***

Once an application form has been submitted and the appropriate fee has been paid, the application automatically is assigned an “active” status. All applications are concluded with a status of either “completed,” “cancelled” or “withdrawn.”

A completed application reflects successful completion of the Certification process with the Reference Certification issued. Once this occurs, no refunds are available for any reason.

A withdrawn application indicates that GBHealth was unable to complete the Certification process through no fault of the applicant company. In such cases, the full application fee is refundable.

A cancelled application status indicates that the applicant company chose to terminate the application process after it started for any reason. In such cases, since Certification work was performed by GBHealth, a refund of not more than 50% of the application fee may be made, the exact amount to be determined solely by GBHealth to reflect the amount of effort expended to the point of cancellation.