

MERLIN

The Sales and Marketing
SaaS Platform Developed Exclusively
for Ambulatory Surgery Centers

infinia



SOLVE
DIGITAL PARTNERS

MERLIN

The Sales and Marketing
SaaS Platform Developed Exclusively
for Ambulatory Surgery Centers (ASC).



The Problem MERLIN Solves

Embracing sales, marketing, and communication is central to achieving the staffing and operational goals and growth objectives of ASCs.

However, many lack the time and resources needed to build a brand and put in place sustainable B2B and B2C marketing, sales, and communication plans.

MERLIN is designed to provide access to world-class content and a digital creative platform with hands-on support.

Built around a SaaS platform, MERLIN's advisory experts in sales, marketing, and communication provide members' guidance, alongside optimized digital tools and templates, to simplify building a stronger referral network, team, and reputation.



OBJECTIVES

- + Drive Sales
- + Contain Costs
- + Nurture Growth
- + Enhance Experience
- + Improve Care



WHY MERLIN

MERLIN

The demand for a membership-based SaaS platform will increase as healthcare transitions from sick to value-based care, analog to digital, and from hospital to ambulatory centers.

These on-going transitions highlight the importance of having a robust referral network, supported by marketing, sales, and communication efforts.

MERLIN was created specifically for ASCs

Our experience working with clients has taught us that brand building, communication, sales, and marketing in healthcare lag other business and service sectors.

Reasons include the fragmented healthcare landscape, digital transformation occurring at different rates of adoption, the move to population health, evolving consumer expectations, an aging population, and a growing need to focus on the patient experience.

ASCs are not exempt from these market forces, which is why we are introducing a SaaS platform that combines content, digital tools, and templates with hands-on support to help them meet the business and marketing challenges facing the sector.



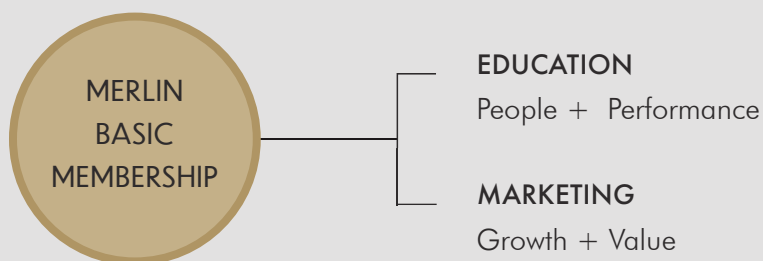
MERLIN MEMBERSHIP & SUPPORT

Memberships

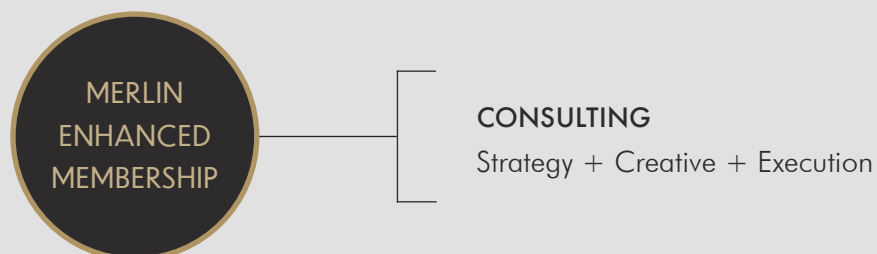
ASC staff members are experts in what they do.

The features, functions, and support MERLIN provides includes the educational, marketing, and communication tools they need to become the best marketers and brand ambassadors possible.

Basic Membership includes offerings that address:



Enhanced Membership includes everything in the Basic Membership, plus advisory services for an additional fee, that offer:



MERLIN
BASIC
MEMBERSHIP

EDUCATION

Branding 101



Audit and Analysis
of Current State



What Is a Brand



Monthly Webinars



Why Brands Matter



AI Basics: How to Build
& Gain from Data



Web Audits and Reviews

EDUCATION

Marketing & Sales



Audit and Analysis
of Current State



What Is Marketing



Monthly Webinars



Public Relations
and Earned Media



Hosting a Lunch and Learn



Using / Producing DIY
Video Content

EDUCATION

Library of Resources



Articles on Branding
and Marketing



Population Health



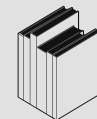
Value-based Care



Links to Expertise



Image Library [limited]



Books [reading lists]

MERLIN
BASIC
MEMBERSHIP

MARKETING
B2B & B2C



Social



Print



Out of Home



Email Blasts



Events Conferences



Sales Tools

MARKETING
Internal Tools



Stationary



Audit Checklist



E-signatures



PPTs



Trifolds



Posters

MARKETING
External Tools



Audit Checklist



Media Planning



One-Pagers: Benefits



One-Pagers: FAQs



Social Media Ads



Paid Ads Local Publications

MERLIN
ENHANCED
MEMBERSHIP

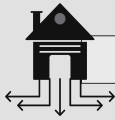
CONSULTING
B2B & B2C Tools



Social



Print



Out of Home



Email Blasts



Events Conferences



Custom Consulting



Media Planning

CONSULTING
Internal Tools



Media Planning



Audit Checklist



E-signatures



PPTs



Trifolds



Posters



Stationary

CONSULTING
External Tools



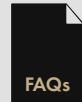
Audit Checklist



Podcast Production



One-Pagers: Benefits



One-Pagers: FAQs



Social Media Ads



Paid Ads Local Publications



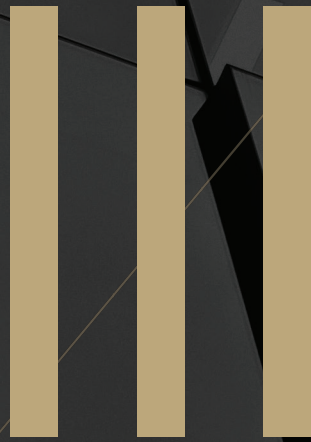
Sales Tools



Support Services

MERLIN combines on-demand brand, marketing, and sales tools with professional support services to aid with:

- + Recruitment advertising and media planning
- + Brand, content, and design strategy and execution
- + Digital marketing, planning, and execution
- + Referral network optimization
- + Video content development and production
- + Thought leadership and related speech writing



MERLIN
PLATFORM



www.MerlinASC.com

Purpose-built for Ambulatory Surgery Centers, the MERLIN SaaS platform improves marketing, sales, and communication, while helping to recruit and retain the best talent.

MERLIN | Marketing Center

Guidelines / Color

Color

Our colors set us apart from other organizations and strengthen the values of our brand. The Master Brand color palette is as important to the brand as the logo and tone of voice. It allows us to express ourselves with maximum legibility across all touchpoints to achieve optimum definition.

Master Brand Color Palette

Merlin Gold PMS 8405 CMYK 400 Y50 K00 RGB 208 184 81 HEX #D2B48C	Merlin Grey PMS 7005 CMYK 400 Y33 K0 RGB 184 184 184 HEX #B0B0B0	Merlin Light Grey PMS 9004 CMYK 35 Y14 K0 RGB 228 228 228 HEX #E0E0E0
Black PMS 6900 CMYK 100 K100 RGB 0 0 0 HEX #000000	White CMYK 0 0 0 RGB 255 255 255 HEX #FFFFFF	

Overall our color palette is restricted to our Master Brand, but our secondary color palette is also available for internal and/or recruitment communication materials.

Secondary Color Palette

Merlin Green PMS 7499 CMYK 400 Y50 K52 RGB 100 100 100 HEX #427272	Merlin Blue Highlight PMS 515 CMYK 400 Y17 K0 RGB 119 119 119 HEX #4682B4	Merlin Light Yellow PMS 9001 CMYK 100 Y14 K0 RGB 222 222 222 HEX #F0E68C
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Our secondary color palette should be used in addition to the Master Brand palette and when developing communication materials for internal documents and/or communication materials. They should be used in support of the master brand colors and messaging in a tasteful manner to preserve the elegance and core values of the brand.

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FAQ | Contact Us | Log Out

MERLIN | Marketing Center

Guidelines / Imagery

Imagery

The photographic and video images selected for Merlin have a large impact on how effective our communications are. All imagery must have a relatable subject matter. How important to recognize that not all communications require use of imagery.



When using photos or video in Merlin communications, it is your responsibility to ensure that all imagery is of professional quality. Allow time for photo research or a

Marketing Center

Brand Knowledge Guidelines Downloads Templates Brand Requests

Logo Downloads

Please read and review the [Logo guidelines](#) before downloading or using any of our logos. For questions on treatment, please reach out to a member of the [Brand Team](#).

Which file format is best?

6 items

Merlin Logo - Positive
1-color (Merlin Gold) logo for light colored backgrounds

Merlin Logo - Positive
1-color (Black) logo for light colored backgrounds

Merlin Logo - Positive (alternate)
1-color (Merlin Grey) logo for light colored backgrounds

Merlin Logo - Reverse
1-color logo (White) for dark colored backgrounds

Merlin Logo - Reverse (alternate)
1-color logo (White) for dark colored backgrounds

MERLIN | Marketing Center

Guidelines / Logo

Logo

The Merlin logo is our most visible identifier and unifies the program across all communications. Following the guidelines is particularly essential because of the consistent and constant nature by which it is used, and for what it represents.

How did the logo come to be?
Our wordmark has been carefully crafted using a custom created typeface with purposeful embellishments or serifs. These crafted details are a reflection of our dedication to creating unique, custom solutions for every person we care for.

Versions

Logo Positive Versions

Logo Reverse Versions

The Merlin logo comes in a variety of different lock-ups to ensure that the brand is presented as clearly as possible across all platforms. It also allows for maximum flexibility where space and size present a challenge. We prefer the use of the Primary Logo on all communications.

Selecting the right one?
Please contact [Brand Marketing](#) to confirm which logo should be used for all communications being created.

Safe Area



Operational FAQs

Does MERLIN offer integration options, to share data with other online apps or services I use?

Yes. MERLIN features an API which can be used to build custom data integrations as needed.

Does MERLIN install software on my computer?

No, MERLIN is an online service and is accessed through a Web browser, like any other web site or service you might use.

With MERLIN, do I need to have other marketing or design applications like Photoshop or Creative Cloud?

In most cases, no. With MERLIN, you create and customize marketing materials from inside your Web browser. You can even create materials on your phone. You can certainly use other applications alongside MERLIN, but they aren't required.

Do we need to know graphic design to use MERLIN?

No, MERLIN's templates are very simple to use and handle all of the creative design for you. You provide the relevant details about your ASC. After a few simple clicks and choices, MERLIN provides high-quality materials ready for distribution.

Does MERLIN replace my clinic's website or my social media feeds?

No, your Web site and social feeds won't change. MERLIN is a separate resource, to help you find ways to improve aspects of your Web site and social media, providing resources you'll need to implement in your Web site or social media tools directly.

We partner with a local marketing and design agency for our marketing and Web site. Can they use MERLIN?

Absolutely, you can invite any external partners, vendors, or other support people to use MERLIN to help your business. It's a great way to share things like logos, brochures, pre- and post-op instructions, and other materials that all of these partners might need while they work with you. You can also assign special permissions, so these external users only see the materials you want them to see. And you can monitor who is using MERLIN and adjust access accordingly.

IV

BENEFITS, FEATURES
& FUNCTIONS



Benefits

MERLIN's on-demand brand, marketing, and sales tools combined with hands-on support services help:

- + Meet increasing competition
- + Attract new talent and patients
- + Lower cost-per-patient acquisition
- + Increase staff retention rates and pride
- + Grow the referral network
- + Create tangible value by maximizing intangibles
- + Maximize facility utilization

Media Type and Channels

EXTERNAL MARKETING

Planning

- + Marketing Audit
- + Budget
- + Communications and Media Schedule
- + Editorial Schedule

Campaigns

- + Print Ads
- + Digital/Banner Ads
- + Employee Recruitment Ads
- + Professional Referral Outreach Efforts

Out of Door

- + Billboards
- + Bus Stations
- + Other

Environmental

- + Posters
- + Interior Signage
- + Exterior Signage
- + Vehicles
- + Counter Displays
- + Counter Cards
- + Frame Easels
- + Digital Displays
- + Window Graphics

Direct

- + Text Messages
- + Newsletters
- + E-mail updates and announcements

Social

- + Social Media (LinkedIn, Instagram, etc.)
- + Public Relations / Earned Media
- + Video

Sponsorships

- + Professional Affiliations
- + Community Relations

INTERNAL MARKETING

- + Staff On-Boarding
- + Email Signature Templates
- + Training and Education
- + Patient Experience

SALES

- + Collateral System (brochures, fact sheets, trifold)
- + Benefits
- + FAQs
- + PowerPoint
- + Conferences/Events
- + Trade Shows
- + Referral Network and Partnerships

WEBSITE AND APP

- + Audit and Analysis
- + New Content
- + New Design



RESEARCH

- + Market Research (Qual and Quant)
- + Patient Satisfaction Survey
- + Employee Satisfaction Survey

STATIONARY

- + Business Cards
- + Letterhead
- + #10 Envelopes
- + #10 Window Envelopes
- + Notecards
- + Notepads Name
- + Tags/Badges
- + Invitations

FORMS

- + Referral Form
- + Employment Application Form
- + Hiring Documents
- + Patient Consent Agreement
- + Patient Assessment Form
- + Patient Disclaimer
- + Physician Orientation

APPAREL

- + Polos
- + Scrubs
- + Fleecees

PROMOTIONAL ITEMS

- + Fleecees
- + Blankets
- + Stainless Steel Vacuum Flasks
- + Silicone Smart Wallets
- + Lip Balm
- + Tote-bags
- + Pens
- + Refrigerator Magnet
- + Hand Sanitizer
- + Stickers
- + Lanyards
- + Lunch Bags
- + Key Chains
- + Notebooks
- + Post-it Notes



Welcome

The Marketing Center is your one-stop destination for all things related to the Merlin brand.

Let's Get Started!

All the resources you'll need

MERLIN

Downloadable Logos

High quality files ready for use



PowerPoint Templates

Save time and make a great impression



Business Cards

Order cards featuring Merlin

MacBook Pro

MERLIN

www.MerlinASC.com

Membership FAQs

What does a MERLIN subscription include?

It depends on the type of membership and the capabilities of your internal team, if you have one.

Is a MERLIN membership enterprise-based, or on a per user basis?

Based on its size, there will be different membership plans for an ASC staff to choose from.

What if help or coaching is needed on how to use the tools and assets found on MERLIN?

Membership comes with three free hours of consultation each month, via a virtual online help desk. Via web conference or phone call, an expert can guide you through the process and address your questions.

Will there be menu of content and creative concepts to choose from related to sales and marketing materials?

Yes, and they will be refreshed periodically on an established editorial and creative schedule.

Why are MERLIN and its support services being launched now?

The time is now to meet this moment in healthcare.

We have consulted in the healthcare brand and marketing world for 20 years. Like healthcare itself, a lot has changed when it comes to marketing and communications.

More ASCs mean more competition, more consumer demand, higher expectations, and a desire for patients to know more and enjoy frictionless experiences. MERLIN can help.

Am I locked in to MERLIN for a long period of time?

No, but we know an annual commitment provides the best value, giving you access to the most resources and support for the lowest cost. We always recommend using MERLIN for a 12-month initial period, to learn and apply as much as possible to jumpstart your marketing. After that, you can cancel your subscription at any time with 90 days notice. Quarterly programs are also available.



V

TEAM

RON CAPPELLO

Chief Executive Officer

Ron founded Infinia in 2003 and has long believed in branding as a critical tool to advance organizational change, innovation and growth.

Clients agree: he's nurtured key relationships at AICPA, tdf, Bank of America, Rutgers Health, Florida Blue, Wellforce, Pfizer, Westfield Insurance, CD&R, General Atlantic Partners, EQT, Nielsen, HCA, Duke University and more.

His ability to express the complex in clear, simple terms has made him a popular speaker in the industry and is frequently published in prominent trade journals.

Previously worldwide President of Enterprise IG, part of WPP Group plc, Ron has a BA in Economics from the University of Colorado.

LIZZIE KUPERSMITH

Strategy Associate

Lizzie is a graduate of Georgetown University, with a double major in Psychology and Art History.

Her clients include, HCA, Duke University, CD&R, CheckPoint Therapeutics and Rutgers Health, among others.

Lizzie has previously worked in several client-facing roles, as a Gallery Associate in NYC, as well as on the Media Relations team at a PR and Communications firm.

Through her work she gained a deep understanding of how to creatively position clients and refine their purpose and goals. In her free time, Lizzie loves to visit art museums, cook and take yoga classes.

MIKE LOEHR

Solve Digital Partners

Mike is CEO and co-founder of Solve Digital Partners, with backgrounds in technology and broadcast journalism. In 25 years of DAM and marketing technology experience, he's designed and built award-winning solutions for some of the most recognized brands, including GE, Deloitte, American Express and Century21.

He has an unmatched depth of knowledge and understanding of how technology can help educate, inspire, and reward employees around a brand. Outside of brand work, Mike spends time with his family, playing tennis and traveling as much as possible.

MATT FILBY

Solve Digital Partners

Matt is a founding partner of Solve Digital Partners, where he continues his dedication to helping organizations find better ways to communicate and work in the digital world.

A designer for nearly 25 years, he's focused on Web application design and development since 2000. His dedication to creating intuitive user experiences and working with clients to create vision and conceive solutions has delighted a range of Fortune 500 companies. He has earned a few awards over the years but finds satisfied clients to be a greater reward.

CRISTIANE BORGES

Chief Creative Officer

Cristiane has been working in the New York City's advertising industry for more than seven years. She created work for agencies such as Ogilvy (for the offices in New York, Brussels, and Toronto), Sapient Razorfish, McCann, Weber Shandwick, DKNY, Time Inc., Havas Media, Wolff Olins, and Barrow's Global, among several others.

Her work as an Information Designer includes screen presentations, RFI and RFP decks, and infographics and animation design for clients in the industries of entertainment, fashion, technology, automotive, finance, chemical, pharmaceutical, transportation, retail, food, and cosmetics.

In the pharmaceutical and healthcare industries, she has worked for brands such as Bayer, Novartis, Bristol-Myers Squibb, Mylan, Pfizer, Sunovion, Sage Therapeutics, Stryker, iBio, and Johnson & Johnson, among others.

NANCY SENKEN

Chief Administrative Officer

Nancy is CAO at Infinia Group. She is responsible for the creation and implementation of company systems and procedures, human resources, A/P and A/R, public relations, and office management.

Before joining Infinia, she was Vice President, Business Development and Administration, at Enterprise IG, owned by WPP Group, where she was responsible for public relations, business development, human resources, and office management. Nancy was also a Senior Associate at brand and identity consulting firm Lippincott Mercer, responsible for the development of the firm's marketing materials. Nancy attended John Abbott College in Montreal, Canada, and New York University where she studied marketing and organizational behavior.

SELECTED CLIENTS



Founded in 2003 Infinia creates strategic communications and designs that move organizations forward. We do this by making the complex simple and the simple memorable.

Contact: rcappello@infiniagroup.com | +1 646.209.0832



Founded in 2012 Solve helps managers of high-value brands improve control, maintain consistency, and build employee engagement, with technology and service offerings to increase marketing efficiency and reduce costs.

Contact: mike@solvedigitalpartners.com | +1 303.359.3654



MERLIN

www.MerlinASC.com