

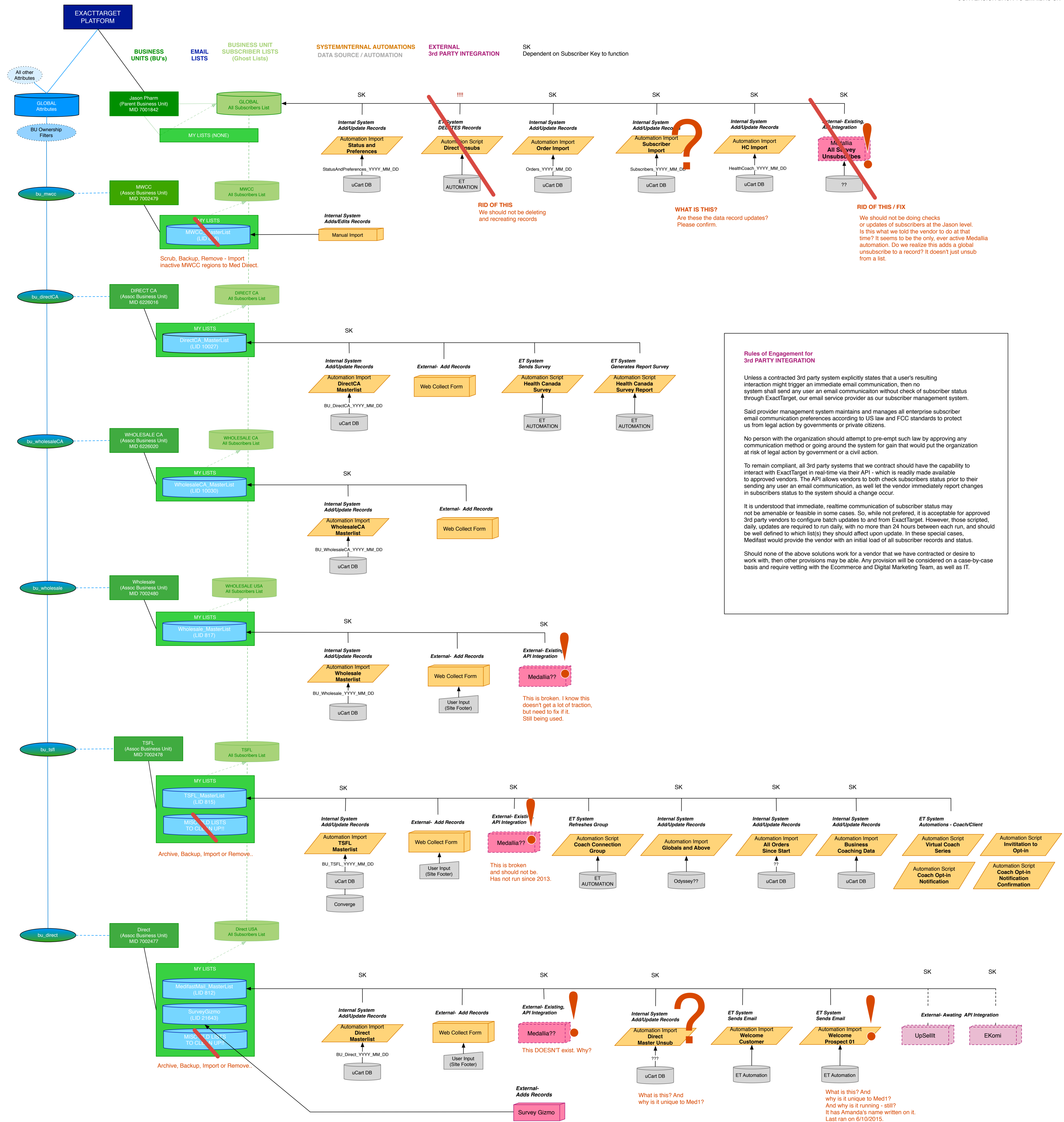
**PREFACE:**

The following notes are initial high-level comments and questions about what is seen on the surface after reviewing existing Automations and platform structure. This diagram may or may not be complete or 100% accurate. It should be used as reference point to create conversation and highlight known system components and automations that will need to be considered and supported/reworked as part of the Subscriber Key conversion process.

**COMMENTS/QUESTIONS re: existing automations and lists**

- 1 CHANGE SUBSCRIBER KEY to EMAIL ADDRESS**
- 2 REMOVE/MIGRATE MWCC MASTER LIST(S)**  
Backup, remove the lists within the MWCC Business Unit. Then extract list subscribers that are located within DMAs or states that contain active MWCC's. Migrate remaining list to Direct\_MasterList.
- 3 STOP AUTOMATION/PRACTICE OF DELETING RECORDS AND RE-ADDING AS CUSTOMER.**  
It was understood that this practice and automation had been discontinued, but it appears as if that is not the case. Will be taken care of with the change of SK to Email.
- 4 INVESTIGATE MEDALLIA IMPLEMENTATION.**  
First note, Medallia subscriber check and unsubscribe process is broken. This broke when we changed the SK from Email to USID. Now that we are changing the SK back to Email this problem MIGHT fix itself. However, we are confused as to why the email check/unsub process is taking place at the Jason level. I don't think that anyone was aware that this is problematic. Processing these at the Jason level is creating a global unsub and not checking the subscribe status of the master lists for each BU as it should. We can see that at one time Medallia was check interacting with the core BU's, but is no longer doing so.  
**4.1** Any automated process for Medifast Direct is missing entirely.
- 5 INVESTIGATE DIRECT MASTER UNSUB**  
Purpose as stated in Automation Notes: "Unsubscribe from Direct\_MasterList when a TSFL subscriber is using the same email address." Unclear on what this process is and if it is even practical any longer. When was this added to Automations and under whose direction? I am not sure we should support going forward.  
  
(Optionally and upon vetting required effort to meet deadlines , we may be able to place products and BUY buttons on the Shopping Cart page to allow Users to add additional products to their cart without having to return to the landing page.)
- 6 WELCOME PROSPECT 01**  
Purpose as stated in Automation Notes: "Brand Introduction, to everyone." Unclear on who this is sent to and when. Not run since 6/10/15, but recent enough to investigate.
- 7 VIRTUAL COACHING SERIES**  
This might be the most complex to support and migrate to new SK. Will need to ensure we don't break and that changes won't disrupt series sends. However, subscribership is VERY low across the board on these emails.





**Rules of Engagement for 3rd PARTY INTEGRATION**

Unless a contracted 3rd party system explicitly states that a user's resulting interaction might trigger an immediate email communication, then no system shall send any user an email communication without check of subscriber status through ExactTarget, our email service provider as our subscriber management system.

Said provider management system maintains and manages all enterprise subscriber email communication preferences according to US law and FCC standards to protect us from legal action by governments or private citizens.

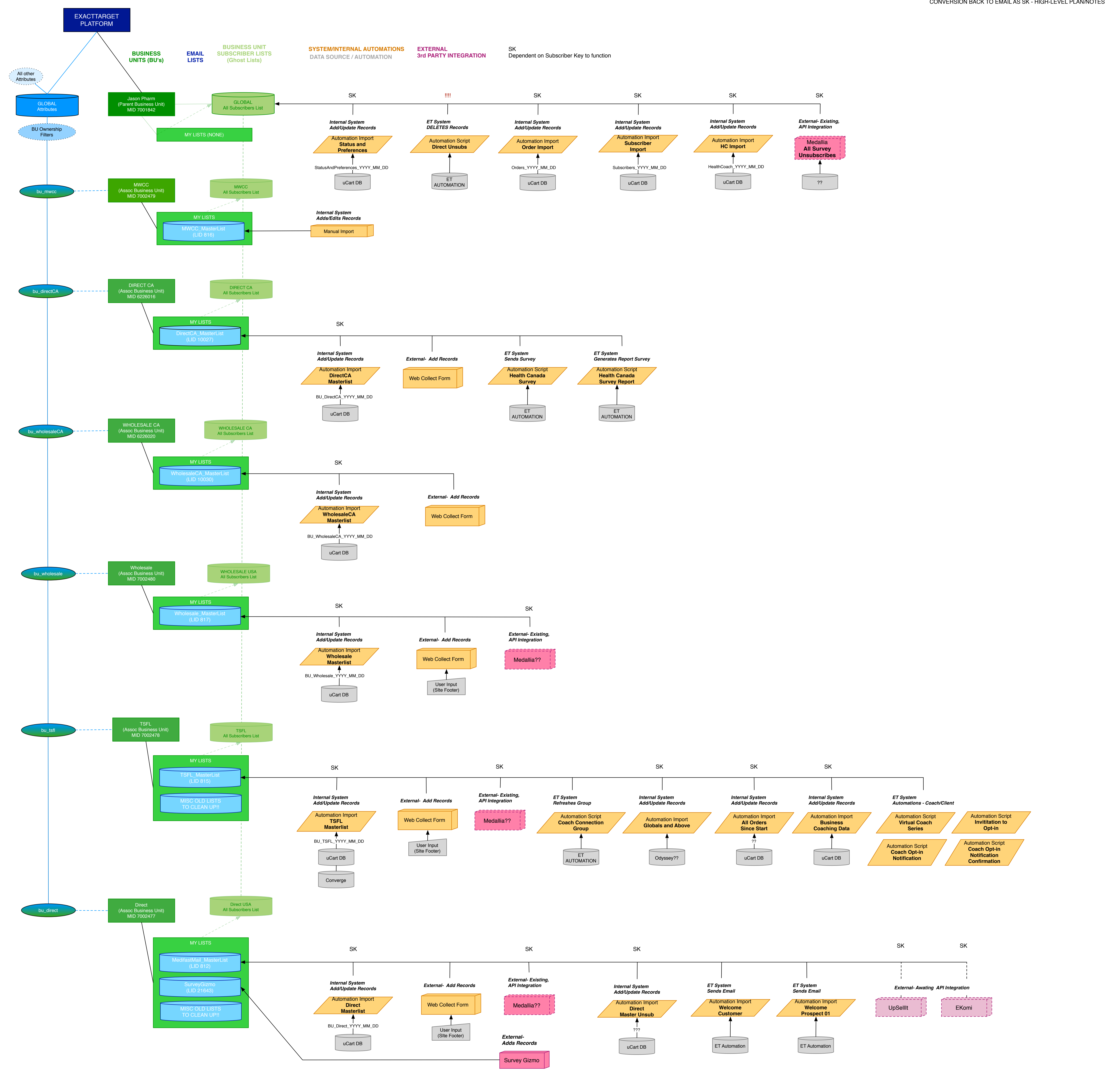
No person with the organization should attempt to pre-empt such law by approving any communication method or going around the system for gain that would put the organization at risk of legal action by government or a civil action.

To remain compliant, all 3rd party systems that we contract should have the capability to interact with ExactTarget in real-time via their API - which is readily made available to approved vendors. The API allows vendors to both check subscribers status prior to their sending any user an email communication, as well let the vendor immediately report changes in subscribers status to the system should a change occur.

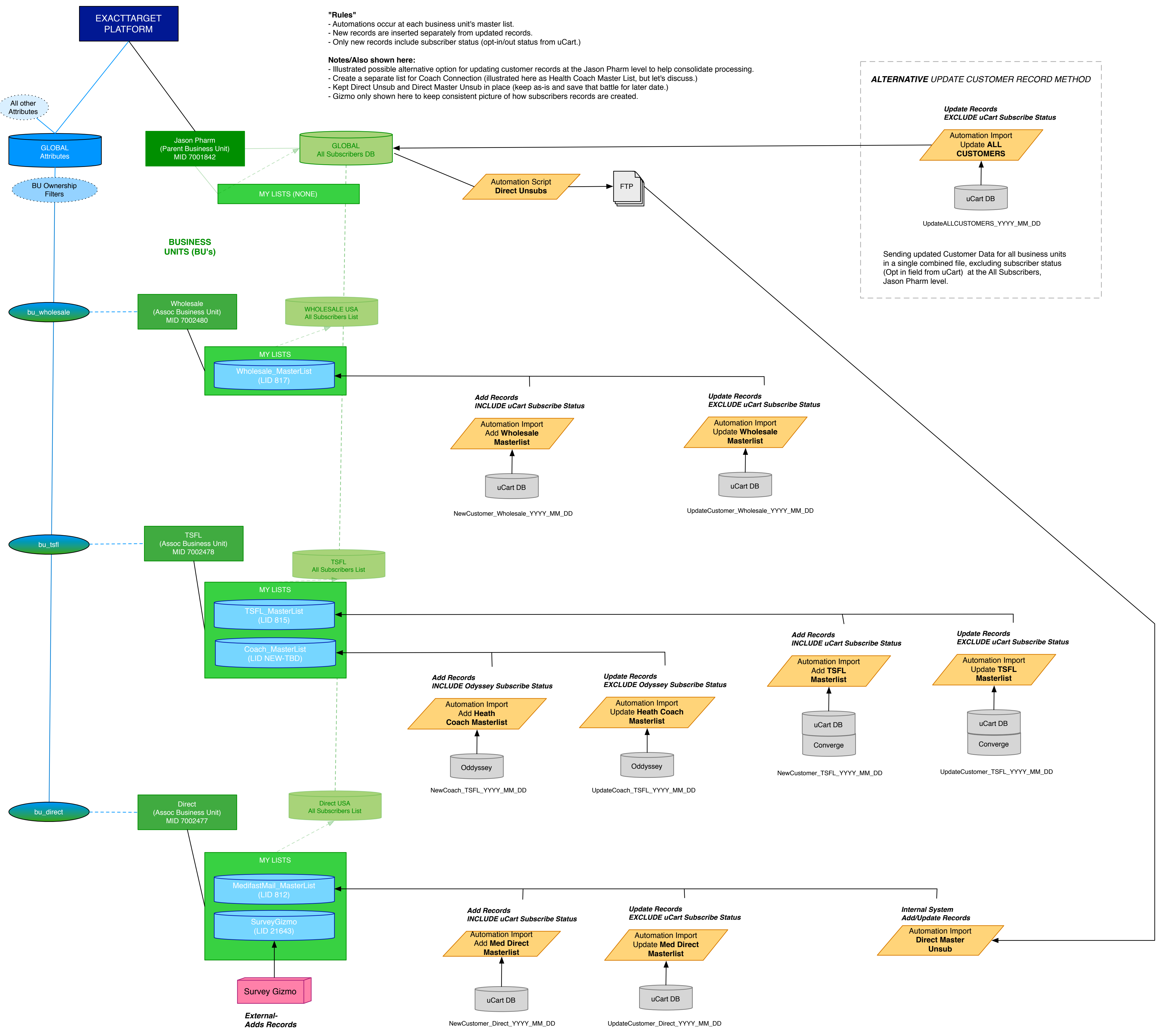
It is understood that immediate, realtime communication of subscriber status may not be amenable or feasible in some cases. So, while not preferred, it is acceptable for approved 3rd party vendors to configure batch updates to and from ExactTarget. However, those scripted, daily, updates are required to run daily, with no more than 24 hours between each run, and should be well defined to which list(s) they should affect upon update. In these special cases, Medifast would provide the vendor with an initial load of all subscriber records and status.

Should none of the above solutions work for a vendor that we have contracted or desire to work with, then other provisions may be able. Any provision will be considered on a case-by-case basis and require vetting with the Ecommerce and Digital Marketing Team, as well as IT.





**UCART & ODDYSEY DIAGRAM OF NEW AUTOMATIONS - ET ARCHITECTURE**



**"Rules"**  
 - Automations occur at each business unit's master list.  
 - New records are inserted separately from updated records.  
 - Only new records include subscriber status (opt-in/out status from uCart.)

**Notes/Also shown here:**  
 - Illustrated possible alternative option for updating customer records at the Jason Pharm level to help consolidate processing.  
 - Create a separate list for Coach Connection (illustrated here as Health Coach Master List, but let's discuss.)  
 - Kept Direct Unsub and Direct Master Unsub in place (keep as-is and save that battle for later date.)  
 - Gizmo only shown here to keep consistent picture of how subscribers records are created.

**ALTERNATIVE UPDATE CUSTOMER RECORD METHOD**

*Update Records EXCLUDE uCart Subscribe Status*

Automation Import Update ALL CUSTOMERS

uCart DB

UpdateALLCUSTOMERS\_YYYY\_MM\_DD

Sending updated Customer Data for all business units in a single combined file, excluding subscriber status (Opt in field from uCart) at the All Subscribers, Jason Pharm level.

*Add Records INCLUDE uCart Subscribe Status*

Automation Import Add Wholesale Masterlist

uCart DB

NewCustomer\_Wholesale\_YYYY\_MM\_DD

*Update Records EXCLUDE uCart Subscribe Status*

Automation Import Update Wholesale Masterlist

uCart DB

UpdateCustomer\_Wholesale\_YYYY\_MM\_DD

*Add Records INCLUDE Odyssey Subscribe Status*

Automation Import Add Heath Coach Masterlist

Odyssey

NewCoach\_TSFL\_YYYY\_MM\_DD

*Update Records EXCLUDE Odyssey Subscribe Status*

Automation Import Update Heath Coach Masterlist

Odyssey

UpdateCoach\_TSFL\_YYYY\_MM\_DD

*Add Records INCLUDE uCart Subscribe Status*

Automation Import Add TSFL Masterlist

uCart DB

Converge

NewCustomer\_TSFL\_YYYY\_MM\_DD

*Update Records EXCLUDE uCart Subscribe Status*

Automation Import Update TSFL Masterlist

uCart DB

Converge

UpdateCustomer\_TSFL\_YYYY\_MM\_DD

*Add Records INCLUDE uCart Subscribe Status*

Automation Import Add Med Direct Masterlist

uCart DB

NewCustomer\_Direct\_YYYY\_MM\_DD

*Update Records EXCLUDE uCart Subscribe Status*

Automation Import Update Med Direct Masterlist

uCart DB

UpdateCustomer\_Direct\_YYYY\_MM\_DD

*Internal System Add/Update Records*

Automation Import Direct Master Unsub

Survey Gizmo

**External- Adds Records**