Certify Health Solutions & Action Plans
MSF Winter Clinic: Certify Health Team 1
01/16/2026

Connor Hickey:

<u>**Project Description**</u>**:** Certify Health needs to:

- **Discover and track competitors in the "middle market healthcare" space**
    i. How do we define "Middle Market"?
    ii. Clearwave, Phreesia, Epion Health, Tonic Health
    iii. "Non-enterprsie" Not large for or non profit institution
        1. SMBs, practice-focused, ANYONE who is not an "epic EMR client" is our target
        2. 3 - 1000 location practice groups, 50+ = large, 15 - 50 = medium, small = 1 - 15

            Dental, med spa, cash heavy practices

            Understand the growth in these specific verticals

                Target high cash pay because we have a payments capability that can be sold alongside others

        3. Opportunity to sign smaller practices that are backed by PE - consolidation will create more clients
        4.
- **Collect and validate evidence about competitor claims (pricing, features, etc.)**
    i. What competitor data should we focus on collecting? (Internal KPIs, Industry Metrics, Financials, Customer Sentiment, Hiring Trends, Blogs, News Reports, etc.)
    ii. Customer acquisition (quantity) metrics. Some can be vocal about customers won - Clearwave does this
    iii.
- **Monitor changes to competitor websites and evidence sources over time**
    i. How frequent will we need to be able to scan these sources to ensure data freshness?
    ii. Of the solutions Certify Health provides, which should we focus on? How do we determine which companies/solutions are competitors to these respective solutions?
- **Flag claims for human review when automatic validation fails**
    i. To what degree of automation is preferred for each area in the workflow?
        1. (ex. WF; Competitor identification > data scraping/qualification > data extraction > change detection > data manipulation/transformation > data analysis, etc.)

2. (100% autonomy, hybrid with human review, etc.)
- **Maintain version history of all validated claims with full audit trails**
    i. What medium should we do this on? (Excel, PowerPoint, Custom Software, etc.)
- **Alert stakeholders when important changes are detected**
    i. Who internally will be using this tool/data?

Solution: "Certify Intel": Develop an AI-driven, automated system/platform that:

- Monitors competitors' solutions, websites, and overall online presence and positioning
- Autonomously scrapes and extracts targeted raw data (pricing, features, positioning, etc.)
- Stores, organizes and cleanses these extracted data
- Transforms these raw data into actionable competitor insights, metrics, and KPIs
- Displays a high-fidelity visualization interface that converts raw competitive intelligence into actionable insights, utilizing dynamic charts, graphs, and heatmaps to facilitate rapid decision-making
- Deploys automated, event-driven alerts for critical data changes and leverages GenAI to instantly synthesize these updates into executive-level summaries, and suggested action plans

.

==Option 2: Excel Workbook (Cloud-Powered):== An AI-powered competitive intelligence workbook that connects to a cloud backend which automatically monitors healthcare IT competitors, scrapes their websites, and uses GPT-4 to extract pricing, features, and positioning data. The Excel interface displays this intelligence through familiar pivot tables, charts, and conditional formatting—refreshed on-demand or on a schedule—while automated email alerts deliver GenAI-generated executive summaries when critical changes are detected. This approach combines the power of autonomous AI data collection with Excel's familiar, flexible analysis environment.

a. A backend server does the "heavy lifting", and displays the results in Excel

Certify Health Solutions & Action Plans
MSF Winter Clinic: Certify Health Team 1
01/16/2026

> **KK** However, it summarizes the draft, here's all the things happening in the news. Here's new people that got funded, here's the funding that's happening. from a competitive standpoint, and then even on a practice standpoint, here is all the deals that happened in roll-ups, PE back, whatever it is. I love that.

Create the Agent that identifies qualified competitors
- Be able to extract one type of competitor metric
-

I want to create an ai agent that identifies companies that sell ehr services to ambulatory clinics