

Provider Acquisition Strategy

CareLink AI Marketplace - 5th Persona

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Timeline: Month 1-12 Strategy

Target: 20-30 beta providers, 50-100 providers by Month 12



Table of Contents

1. Executive Summary
 2. Provider Persona Definition
 3. Pricing Strategy & Analysis
 4. Revenue Projections from Providers
 5. Beta Recruitment Plan
 6. Acquisition Tactics
 7. Onboarding Process
 8. Success Metrics & KPIs
 9. Provider Categories Deep Dive
 10. Email Templates
 11. Partnership Agreement Template
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Executive Summary

Providers represent the 5th critical persona in the CareLink AI marketplace ecosystem, completing the full senior care value chain:

The Five Personas:

1. **Families** → Searching for care homes (FREE)
2. **Operators** → Care facilities with vacancies (PAID subscription)
3. **Caregivers** → Job seekers in senior care (FREE, premium optional)
4. **Discharge Planners** → Hospital placement coordinators (FREE + referral incentives)
5. **Providers** → Ancillary services supporting senior care (FREEMIUM) ★ NEW

Why Providers Matter:

- **For Families:** One-stop shop for all senior care needs (care home + services)
- **For Operators:** Value-added marketplace (refer families to trusted providers)
- **For Providers:** Access to qualified B2C and B2B leads
- **For CareLink AI:** Additional revenue stream + increased platform stickiness

Strategic Approach:

- **Freemium Model:** Free basic listing + paid premium features

- **Beta Phase:** 20-30 providers across 6-8 categories (Month 1-2)
 - **Scale Phase:** 50-100 providers by Month 12
 - **Revenue Target:** \$1,500-\$3,000 MRR from providers by Month 12
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Provider Persona Definition

What Are Providers?

Providers are **ancillary service businesses** that support senior care beyond the care home itself. They serve both **families** (B2C) and **operators** (B2B).

Provider Categories

1. Transportation Services

Description: Medical transport, non-emergency transport, shuttle services, rideshare for seniors

Target Businesses:

- Medical transport companies (wheelchair-accessible vans)
- Senior shuttle services
- Rideshare services specializing in elderly
- Airport/appointment transportation

Services Offered:

- Doctor appointments
- Grocery shopping trips
- Social outings
- Emergency transport
- Airport transfers

Pain Points:

- Hard to reach target audience (seniors/families)
- Expensive advertising (Google Ads, Yellow Pages)
- Sporadic demand (unpredictable bookings)

Value Proposition:

“Get qualified leads from families and care facilities looking for senior transportation services. Free to list, pay only for premium visibility.”

2. Housekeeping Services

Description: Cleaning, laundry, organization for seniors' homes or care facilities

Target Businesses:

- Residential cleaning companies
- Senior-specific housekeeping services
- Laundry services
- Organization specialists (decluttering, downsizing help)

Services Offered:

- Weekly/bi-weekly home cleaning
- Deep cleaning before/after moves
- Laundry and linen services
- Hoarding cleanup
- Estate downsizing assistance

Pain Points:

- Low-margin business (need consistent clients)
- Hard to differentiate (commoditized service)
- Senior-specific needs (patience, trust, reliability)

Value Proposition:

“Connect with families who need trusted housekeeping for aging parents. Build recurring client relationships through our platform.”

3. Food Services

Description: Meal delivery, catering, dietary specialists for seniors

Target Businesses:

- Senior meal delivery services (e.g., Mom's Meals-style local businesses)
- Catering companies (events at care facilities)
- Personal chef services
- Dietary/nutrition consultants

Services Offered:

- Daily meal delivery (breakfast, lunch, dinner)
- Special diet meals (diabetic, low-sodium, pureed)
- Catering for facility events
- Nutrition counseling
- Grocery shopping services

Pain Points:

- Customer acquisition cost (CAC) is high
- Seniors may not be tech-savvy (hard to order online)
- Need consistent volume for profitability

Value Proposition:

“Reach seniors and care facilities looking for meal solutions. Get listed in front of families actively making care decisions.”

4. Medical Equipment Suppliers

Description: Wheelchairs, walkers, hospital beds, mobility aids, adaptive equipment

Target Businesses:

- Durable medical equipment (DME) suppliers
- Mobility equipment retailers

- Home medical supply stores
- Adaptive equipment specialists

Services Offered:

- Wheelchair sales/rentals
- Hospital bed sales/rentals
- Walkers, canes, rollators
- Lift chairs
- Bathroom safety equipment (grab bars, shower chairs)
- Home modifications (ramps, stairlifts)

Pain Points:

- Insurance reimbursement complexity (Medicare/Medicaid)
- Families don't know where to start (overwhelming options)
- Delivery/installation logistics

Value Proposition:

“Be the go-to equipment provider for families transitioning to senior care. Get referrals from care facilities and discharge planners.”

5. Pharmacy Services

Description: Pharmacies specializing in senior care, medication management

Target Businesses:

- Long-term care pharmacies
- Independent pharmacies (senior-focused)
- Medication synchronization services
- Home delivery pharmacies

Services Offered:

- Medication delivery
- Blister pack/med sync services
- Medication therapy management
- Prescription transfers
- Compounding pharmacy services

Pain Points:

- Competition from big chains (CVS, Walgreens)
- Thin margins on prescriptions
- Need volume to sustain business

Value Proposition:

“Partner with care facilities and reach families needing specialized pharmacy services for their loved ones.”

6. Home Health Services

Description: In-home nursing, home health aides, skilled care

Target Businesses:

- Home health agencies
- Private duty nursing companies
- Skilled nursing services
- Post-hospital care providers

Services Offered:

- Skilled nursing (RN/LPN visits)
- Home health aides (bathing, dressing, meal prep)
- Physical therapy (in-home)
- Occupational therapy
- Speech therapy
- Wound care

Pain Points:

- Staffing challenges (caregiver shortage)
- Licensing/compliance complexity
- Need consistent referral pipeline

Value Proposition:

“Get qualified referrals from discharge planners and families looking for in-home care alternatives to nursing homes.”

7. Physical Therapy Services

Description: In-home or outpatient PT for seniors

Target Businesses:

- Physical therapy clinics
- In-home PT services
- Mobile PT providers
- Specialty PT (fall prevention, balance training)

Services Offered:

- Post-surgical rehab
- Fall prevention programs
- Balance and gait training
- Strength and conditioning
- Pain management

Pain Points:

- Insurance authorization challenges
- No-show rates
- Transportation barriers (patients can't get to clinic)

Value Proposition:

“Connect with seniors needing PT services. In-home providers can reach patients who can't travel.”

8. Other Ancillary Services

Legal Services:

- Elder law attorneys (estate planning, Medicaid planning)
- Guardianship/conservatorship attorneys

Financial Planning:

- Senior financial advisors (retirement planning, care funding)
- Reverse mortgage specialists

Move Management:

- Senior move managers (downsizing, packing, estate sales)
- Moving companies specializing in seniors

Technology Services:

- Medical alert systems (Life Alert, Medical Guardian)
- Telehealth platforms
- Medication reminder apps

Home Modifications:

- Contractors (ramps, grab bars, widening doorways)
 - Accessibility specialists
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Ideal Provider Profile

Best Fit for CareLink AI:

- **B2C and/or B2B:** Serve families AND/OR care facilities
- **Local/Regional:** Service area overlaps with target cities
- **Small to Mid-Size:** 1-50 employees (need cost-effective marketing)
- **Quality-Focused:** Licensed, insured, reputable (we vet providers)
- **Tech-Comfortable:** Can manage online profile, respond to inquiries
- **Senior-Specialized:** Understand unique needs of elderly population

Not a Fit:

- National chains with large marketing budgets (don't need us)
 - Unlicensed/uninsured providers (liability risk)
 - Providers outside our service area (can't serve our users)
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Pricing Strategy & Analysis

Pricing Model Options Analyzed

Option 1: Free Model

Structure: All providers list for free, no fees

Pros:

- Easy to recruit (no barrier to entry)
- Build marketplace supply quickly
- Creates value for families/operators (more options)

Cons:

- X No revenue from this segment
- X May attract low-quality providers (no skin in the game)
- X Hard to monetize later (expectations set)

When to Use: Early stage (Month 1-3) to build critical mass

Verdict: Good for beta, not sustainable long-term X

Option 2: Commission Model

Structure: Charge 10-15% of each booking/transaction

Pros:

- ✓ Aligned incentives (we win when they win)
- ✓ Performance-based (providers only pay when they get business)
- ✓ Can generate high revenue if transaction volume is high

Cons:

- X Requires transaction tracking infrastructure (complex)
- X Provider friction (tracking bookings, reporting, disputes)
- X Low transaction frequency for some services (e.g., equipment rentals)
- X Takes % of provider's margin (they may resist)

Example: Medical transport provider gets \$100 ride → CareLink AI takes \$10-\$15

Verdict: Too complex for Year 1, consider for Year 2+ ⚠

Option 3: Subscription Model

Structure: Monthly fee for listing + leads (e.g., \$29-\$99/month)

Pros:

- ✓ Predictable recurring revenue
- ✓ Simple to understand (flat fee)
- ✓ Scales with provider base

Cons:

- X Harder to recruit (upfront commitment)
- X Providers may churn if leads don't come fast enough
- X Price sensitivity (small businesses watching costs)

Example: Transportation provider pays \$49/month for listing + inquiries

Verdict: Good for established providers, but high barrier to entry ⚠

Option 4: Freemium Model ★ RECOMMENDED

Structure: Free basic listing + paid premium features

Pros:

- Easy to recruit (free = no friction)
- Upsell opportunity (once providers see value, upgrade)
- Revenue potential from serious providers
- Balances liquidity and monetization
- Mirrors successful marketplace models (Yelp, Thumbtack, Houzz)

Cons:

- Need to create clear value differentiation (free vs paid)
- Conversion rate may be low (10-25% of free → paid)

Structure:

- **FREE Basic:** All providers get basic listing (name, services, contact, reviews)
- **PAID Premium:** \$49-\$99/month for enhanced features (see details below)

Verdict: BEST CHOICE for Year 1

Option 5: Lead Generation Fee

Structure: Pay per qualified lead (e.g., \$5-\$20 per lead)

Pros:

- Performance-based (providers only pay for results)
- Low risk for providers (try before you buy)
- Can generate significant revenue with high lead volume

Cons:

- Lead quality disputes ("this wasn't a real lead")
- Complex tracking and invoicing
- May incentivize quantity over quality

Example: Family requests transportation quote → Provider pays \$10 for contact info

Verdict: Good as optional add-on, not primary model

RECOMMENDED MODEL: Freemium + Optional Lead Packs**Tier 1: FREE Basic Listing****Included:**

- Provider profile (name, logo, description, services)
- Contact information (phone, email, website)
- Service area map
- Basic search visibility
- Customer reviews (display only, can't respond)
- Up to 3 service categories
- Standard support (email only)

Goal: Get all providers on platform with zero friction

Target: 80%+ of providers start with Free tier

Tier 2: PREMIUM Listing - \$49/month (\$470/year, save \$118)

All Free features, PLUS:

- **Featured placement** (top 30% of search results)
- **Lead tracking dashboard** (views, inquiries, conversions)
- **Respond to reviews** (reputation management)
- **Email & SMS notifications** (instant lead alerts)
- **Enhanced profile** (unlimited photos, videos, virtual tours)
- **Custom branding** (colors, banner image)
- **Priority support** (phone + email, 24-hour response time)
- **“Verified Provider” badge** (trust signal)
- **Monthly performance reports**
- **Up to 10 service categories**

ROI Pitch:

“Get just 1-2 new clients per month to cover your subscription cost. Break even with \$50-\$100 in new business.”

Target: 15-25% of providers upgrade to Premium

Tier 3: PREMIUM PLUS Listing - \$99/month (\$950/year, save \$238)

All Premium features, PLUS:

- **Featured placement** (top 10% of search results)
- **Lead prioritization** (your profile shown first to matching families)
- **Direct phone leads** (families can call you directly from profile)
- **B2B operator network access** (get referrals from care facilities)
- **Exclusive operator discounts** (offer special rates to operators)
- **Featured in newsletter** (monthly spotlight to families)
- **Provider training resources** (marketing tips, sales training)
- **Unlimited service categories**
- **Early access to new features**

ROI Pitch:

“Reach both families AND care facilities. Get 3-5 qualified leads per month. \$99/month = \$3.30/day
= Less than a coffee.”

Target: 5-10% of premium providers choose Premium Plus

Optional Add-On: Lead Packs

Pay-Per-Lead Option (for any tier):

- **5 Premium Leads:** \$50 (\$10/lead)
- **10 Premium Leads:** \$80 (\$8/lead)
- **25 Premium Leads:** \$175 (\$7/lead)

What's a Premium Lead?

- High-intent inquiry (family or operator actively looking)
- Pre-qualified for service type, location, budget

- Delivered via phone + email with introduction
- Guaranteed response within 24 hours (or lead replaced)

Who Uses Lead Packs?

- Providers testing the platform (not ready for monthly subscription)
 - Seasonal providers (high demand periods only)
 - Providers who want extra leads beyond subscription
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Pricing Rationale: Why Freemium?

1. Matches User Behavior:

- Families search for care homes (main use case)
- **Secondary behavior:** "What else do I need?" (transport, equipment, etc.)
- Providers with free listings = more options for families = better experience

2. Low Barrier to Entry:

- "List your business for free" = easy yes
- Get 50-100 providers quickly (critical mass)
- Providers see value before paying (try before buy)

3. Upsell Path:

- Free → See 10-20 profile views → No conversions (buried in search)
- Pitch: "Upgrade to Premium, get featured placement, respond to reviews, track leads"
- Conversion trigger: "You're getting views but not inquiries. Let's fix that."

4. Revenue Potential:

- 100 providers × 20% premium rate × \$49/month = **\$980/month MRR**
- 100 providers × 5% premium plus rate × \$99/month = **\$495/month MRR**
- Total: **\$1,475/month MRR from providers**

5. Low Risk:

- If conversion is low, we still have marketplace liquidity (free listings)
 - If conversion is high, incremental revenue (no additional infrastructure cost)
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Competitive Pricing Comparison

Platform	Model	Cost	Our Advantage
Thumbtack	Pay-per-lead	\$10-\$50/lead	Our premium is lower, predictable
Angi (Angie's List)	Subscription	\$40-\$100/month	Comparable, but we're senior-focused
Yelp	Pay-per-lead + ads	\$300-\$1,000/month	We're 80%+ cheaper
Care.com	Subscription	\$35-\$60/month	Comparable pricing
HomeAdvisor	Pay-per-lead	\$15-\$60/lead	We offer subscription alternative
CareLink AI	Freemium + leads	FREE to \$99/month + optional lead packs	FREE option + lower cost premium

Key Differentiator: Only senior care-focused marketplace for providers (vs general home services)

Revenue Projections from Providers

Assumptions

Provider Growth:

- Month 1-2 (Beta): 20-30 providers (all free)
- Month 3-6: 35-50 providers (10-15% paid)
- Month 7-12: 60-100 providers (20-25% paid)

Conversion Rates:

- Free → Premium: 15-20%
- Premium → Premium Plus: 20-30% of Premium subscribers
- Lead Pack purchases: 5-10% of free providers (sporadic)

Pricing:

- Premium: \$49/month
 - Premium Plus: \$99/month
 - Average: \$60/month (weighted average)
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Year 1 Revenue Projections: Providers

Month	Total Providers	Free	Paid (Premium)	Paid (Premium+)	MRR	Notes
1-2	25	25	0	0	\$0	Beta phase (all free)
3	30	27	2	1	\$197	Launch paid, soft pitch
4	35	30	4	1	\$295	Early adopters convert
5	40	33	5	2	\$443	Word of mouth grows
6	45	36	7	2	\$541	Case studies shared
7	55	43	9	3	\$738	Scaling recruitment
8	65	50	11	4	\$935	More categories added
9	75	57	13	5	\$1,132	Referrals increase
10	85	64	15	6	\$1,329	Consistent growth
11	90	67	16	7	\$1,477	Optimizing conversion
12	100	73	18	9	\$1,773	End of Year 1

Year 1 Provider Revenue:

- **Total MRR (Month 12): \$1,773**
- **Total Revenue (Year 1): \$7,860**
- **Average Provider Value:** \$65/month (paid providers)

Combined with Operators Revenue (from Master Plan):

- **Operator MRR (Month 12, Moderate): \$15,390**

- **Provider MRR (Month 12): \$1,773**
 - **TOTAL MRR: \$17,163**
 - **New Year 1 ARR: \$205,956 (vs \$184,680 without providers = +\$21,276)**
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Year 2 Projections (Conservative)

Assumptions:

- Grow to 200 providers by end of Year 2
- 25-30% paid conversion rate (improved value prop)
- Add commission on high-value transactions (optional, 5% take rate)

Metric	Year 2 End
Total Providers	200
Free Providers	140
Paid Providers	60 (30% conversion)
Provider MRR	\$3,600
Provider ARR	\$43,200
Transaction Revenue (optional)	\$10,000-\$20,000 (5% commission on \$200K-\$400K GMV)

Beta Recruitment Plan

Goal: 20-30 Providers (Month 1-2)

Target Mix by Category:

- Transportation: 4-5 providers
- Housekeeping: 3-4 providers
- Food Services: 3-4 providers
- Medical Equipment: 3-4 providers
- Pharmacy: 2-3 providers
- Home Health: 3-4 providers
- Physical Therapy: 2-3 providers
- Other (Legal, Financial, Move Mgmt): 2-3 providers

Total: 22-30 providers

Beta Recruitment Timeline

Week 1-2: Build Provider Prospect List

Activities:

1. Google Maps search: “[service] + [city] + seniors”
- Example: “medical transport San Francisco seniors”
2. Yelp search: Filter by senior services
3. Chamber of Commerce directories
4. Industry associations (e.g., National Association for Home Care & Hospice)
5. LinkedIn search: Company search by industry + location

Deliverable: Spreadsheet with 100-150 provider prospects

- Company name
- Contact name (if available)
- Phone
- Email
- Website
- Category
- Notes

Time Investment: 2-3 hours/day × 10 days = 20-30 hours

Week 3-4: Outreach (Email + LinkedIn + Phone)

Multi-Channel Approach:

Channel 1: Email (Primary)

- Send personalized email to all 100-150 prospects
- Mailmeteor (free tier: 50 emails/day)
- 3 emails over 2 weeks

Channel 2: LinkedIn (Secondary)

- Connect with company owners/managers
- Send DM after connection accepted

Channel 3: Phone (Follow-Up)

- Call high-priority prospects (didn't respond to email)
- Leave voicemail with beta offer

Daily Schedule:

- Morning (1 hour): Send 50 emails
- Afternoon (1 hour): LinkedIn outreach (20 connections)
- Afternoon (30 min): Phone calls (5-10 calls)

Expected Response Rate:

- Email: 10-15% open + reply (10-22 responses)
- LinkedIn: 30% accept connection, 10% reply (3-5 responses)
- Phone: 20% answer, 50% interested (2-3 conversions)

Total Expected: 15-30 providers interested in beta

Week 5-6: Onboarding & Setup

Beta Onboarding Checklist:

1. **Welcome Email** (automated)
 - Thank you for joining beta
 - Here's what to expect
 - Link to onboarding guide
2. **Profile Setup Call** (optional, 15 min)
 - Walk through profile creation
 - Answer questions
 - Set expectations (feedback, testing)
3. **Profile Completion** (provider self-serve)
 - Business info (name, logo, description)
 - Services offered
 - Service area
 - Pricing (optional)
 - Photos/videos
4. **Review & Publish**
 - CareLink AI team reviews profile (quality check)
 - Approve + publish (live on platform)
 - Send confirmation: "Your profile is live!"

Goal: 100% of beta providers have complete, published profiles by end of Week 6

Beta Offer: What Providers Get

Free for 2 Months:

- Premium features (normally \$49/month) = \$98 value
- "Founding Provider" badge on profile (social proof)
- Priority support (direct access to founder)
- Help shape product (your feedback matters)
- Exclusive: Lock in 20% lifetime discount when you subscribe (Founding Provider rate)

What We Ask:

- Complete your profile (quality listing)
 - Respond to inquiries promptly (within 24 hours)
 - Provide feedback (monthly survey + optional calls)
 - Be patient with bugs (we're in beta!)
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Acquisition Tactics

Channel 1: Direct Outreach (Primary)

Target: 80% of beta sign-ups from direct outreach

Tactics:

1. Build Target List

- Google Maps: Search “[service] + [city]” → Export (Google Maps Scraper or manual)
- Yelp: Search by category → Export contacts
- Industry directories: State licensing boards (home health, medical equipment)

2. Personalized Email Outreach

- Use Mailmeteor (free: 50 emails/day)
- Personalize each email (mention business name, compliment, local connection)
- 3-email sequence (see templates below)

3. LinkedIn Outreach

- Search: “[Job Title] + [City]” (e.g., “Home Health Owner San Francisco”)
- Connection request → Wait for acceptance → Send DM
- Focus on building relationship, not immediate pitch

4. Phone Follow-Up

- Call non-responders (2-3 days after email)
- Voicemail script: “Hi [Name], I’m [Your Name] from CareLink AI. I emailed you about a free opportunity to reach families looking for [service]. Call me back at [phone] or visit [website]. Thanks!”

Time Investment: 2-3 hours/day

Expected Results: 10-15% response rate, 50% of responders convert to beta

Channel 2: Industry Associations & Forums

Target: 10-15% of sign-ups from communities

Tactics:

1. Join Industry Groups

- Facebook groups: “[Service] business owners”, “Senior care providers”
- LinkedIn groups: Home health, medical transport, senior services
- Reddit: r/Entrepreneur, r/smallbusiness (post about marketplace)

2. Provide Value First

- Answer questions
- Share insights (not spammy)
- Build credibility as marketplace expert

3. Mention CareLink AI When Relevant

- Comment: “We’re building a marketplace to connect providers like you with families. Still in beta, but happy to share more if interested.”
- Share beta application link in bio

Time Investment: 30 min/day

Expected Results: 2-4 sign-ups/month from organic community engagement

Channel 3: Partnerships (Operator Referrals)

Target: 5-10% of sign-ups from operator referrals

Tactics:**1. Ask Operators for Provider Recommendations**

- Email to beta operators: "Who do you currently refer families to for [service]?"
- "Would you introduce us? We'd love to have them on CareLink AI."

2. Warm Intro from Operator

- Operator emails provider: "I'm working with CareLink AI. You should check it out."
- Follow-up email from CareLink AI: "Hi [Provider], [Operator] recommended you..."

3. Operator Co-Marketing

- Feature operator + provider together (case study, blog post)
- "How [Care Facility] + [Transport Company] partner to serve families"

Time Investment: 1 hour/week

Expected Results: 1-2 provider sign-ups/month from operator referrals

Channel 4: Content Marketing (SEO + Thought Leadership)

Target: 5% of sign-ups from organic content (Year 1), grow to 20-30% (Year 2+)

Tactics:**1. SEO Blog Posts for Providers**

- "How to Market Your Senior Transportation Business in 2026"
- "5 Ways Home Health Agencies Can Get More Clients"
- "The Ultimate Guide to Senior Care Provider Marketing"

2. Provider Resources

- Free downloadable: "Senior Care Provider Marketing Toolkit"
- Checklist: "How to Optimize Your CareLink AI Profile"
- Webinar: "Getting the Most Out of the CareLink AI Marketplace"

3. Guest Posts

- Write for industry blogs (Home Care Magazine, Transport Today, etc.)
- Pitch: "The Future of Senior Care Marketplaces"

Time Investment: 2 hours/week

Expected Results: 1-3 sign-ups/month from organic content (Year 1), 10-20/month (Year 2+)

Channel 5: Paid Advertising (Month 9+, Budget Allowing)

Budget: \$300-\$500 (test budget)

Platforms:

- Google Ads: Search for "senior care marketing", "how to get more senior clients"
- Facebook Ads: Target business owners in senior care industry
- LinkedIn Ads: Target specific job titles (Owner, Director)

Test Approach:

- Start with \$100 test budget

- Track cost per provider sign-up
- If CPP < \$30, scale up
- If CPP > \$50, pause and refine

Expected Results: 5-10 provider sign-ups from paid (if successful)

Onboarding Process

Provider Onboarding Checklist

Step 1: Sign-Up (Day 0)

Provider Actions:

- Visit carelinkai.com/providers/signup
- Enter business info (name, email, phone, service type)
- Accept terms of service
- Verify email

Automated:

- Welcome email sent immediately (see template below)
 - Account created (status: “Pending Setup”)
-

Step 2: Profile Creation (Day 1-3)

Provider Actions:

- Log in to provider dashboard
- Complete profile:
 - **Business Info:** Name, logo, description (max 500 words)
 - **Services:** Select categories (up to 3 for free, 10 for premium)
 - **Service Area:** ZIP codes, cities, or radius (e.g., “30 miles from San Francisco”)
 - **Pricing:** Optional (hourly rate, package pricing, or “Request Quote”)
 - **Contact:** Phone, email, website
 - **Hours:** Business hours, emergency availability
 - **Insurance:** License #, insurance info (verified by CareLink AI)
 - **Photos:** Business logo, team photos, service photos (up to 5 for free, unlimited for premium)

Automated:

- Profile completion reminder emails (Day 2, Day 4 if incomplete)
 - “Your profile is 60% complete—finish to go live!”
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Step 3: Verification (Day 4-5)

CareLink AI Team Actions:

- Review profile for quality (completeness, professionalism)
- Verify licensing (check state database for home health, medical equipment, etc.)
- Verify insurance (certificate of insurance on file)
- Background check company (Better Business Bureau rating, reviews)

Decision:

- ✓ Approved: Profile published, provider notified
- ⚠ Needs Revision: Email provider with feedback, request changes
- ✗ Denied: Not a fit (unlicensed, poor reputation, out of service area)

Approval Rate: Target 80-90% approval (screen low-quality providers)

Step 4: Go Live (Day 5-7)**Automated:**

- Email: "Your profile is live on CareLink AI!"
- Provider dashboard: Profile published, start receiving views/inquiries
- Weekly digest: "Your profile performance this week (10 views, 2 inquiries)"

Provider Next Steps:

- Respond to inquiries promptly (24-hour response time expectation)
 - Ask happy customers for reviews
 - Optimize profile (add photos, update services)
-

Step 5: Beta Feedback Loop (Ongoing)**CareLink AI Actions:**

- Monthly feedback survey (automated)
- 1-on-1 calls with high-engagement providers (learn what's working)
- Feature requests and bug reports (prioritize roadmap)

Provider Actions:

- Complete monthly survey (5 min)
 - Optional: Join monthly feedback call (30 min)
 - Share testimonial or case study (if successful)
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Onboarding Success Metrics

Metric	Target
Sign-Up to Profile Complete	<3 days (avg)
Profile Completion Rate	80%+
Profile Approval Rate	85-90%
Time to Go Live	<7 days
Provider Satisfaction (NPS)	40+

Success Metrics & KPIs

North Star Metric: Provider GMV (Gross Merchandise Value)

Definition: Total \$ value of transactions generated through CareLink AI platform

Why This Matters:

- GMV = proof that marketplace is working (providers getting business)
- High GMV = high provider satisfaction = low churn
- GMV = future revenue opportunity (commission model in Year 2+)

Target:

- Month 6: \$10K-\$20K GMV
 - Month 12: \$50K-\$100K GMV
 - Year 2: \$500K-\$1M GMV
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Key Metrics Dashboard

Acquisition Metrics

Metric	Month 3	Month 6	Month 12
Total Providers	30	45	100
New Providers/Month	5	8	12
Outreach Sent	100 emails	200 emails	500 emails
Conversion Rate	10-15%	12-18%	15-20%

Engagement Metrics

Metric	Month 3	Month 6	Month 12
Active Providers (MAU)	25 (83%)	38 (84%)	80 (80%)
Profile Views/Provider/Month	10-20	30-50	60-100
Inquiries/Provider/Month	1-3	3-6	8-12
Response Rate (< 24 hrs)	70%	80%	85%

Revenue Metrics

Metric	Month 3	Month 6	Month 12
Paid Providers	3	9	27
Free-to-Paid Conversion	10%	20%	27%
Provider MRR	\$197	\$541	\$1,773
Provider ARPA	\$66	\$60	\$66
Provider Churn	0% (beta)	5%	4%

Marketplace Health Metrics

Metric	Month 3	Month 6	Month 12
GMV (Est.)	\$5K	\$20K	\$80K
Bookings/Month (Est.)	10-20	50-80	150-250
Family-Provider Connections	15-25	60-100	200-350
Operator-Provider Partnerships	2-3	8-12	20-30

Weekly Provider Dashboard

For Founder:

Track these weekly:

1. **New Provider Sign-Ups:** How many this week?
2. **Profile Completion Rate:** % of sign-ups with complete profiles
3. **Active Providers:** % of providers who logged in this week
4. **Inquiries Generated:** Total inquiries sent to providers
5. **Response Rate:** % of inquiries answered within 24 hours
6. **Free-to-Paid Conversions:** How many upgraded this week?
7. **Churn:** How many providers canceled/went inactive?

Dashboard Tool: Google Sheets (manual) or Airtable (automated)

Decision Points & Checkpoints

Month 3 Checkpoint: Should We Scale Providers?

Green Light (Scale Aggressively):

- 25+ providers active on platform
- 10+ family-provider connections made
- 2-3 providers already upgraded to paid
- Positive provider feedback (NPS 30+)
- **Action: Invest more time in provider recruitment (3-4 hours/day)**

Yellow Light (Keep Steady):

- 15-25 providers active
- 5-10 family-provider connections
- 0-1 providers upgraded to paid
- Mixed provider feedback
- **Action: Focus on engagement (help providers get results), continue modest recruitment**

Red Light (Pause/Pivot):

- <15 providers active
 - <5 family-provider connections
 - No providers willing to pay
 - Negative feedback ("not valuable")
 - **Action: Pause provider recruitment, focus on core (operators + families), revisit in Month 6**
-

Month 6 Checkpoint: Is Provider Channel Profitable?

Metrics to Evaluate:

- **Provider MRR:** Is it growing? (\$500+ is healthy)
- **Time Investment:** Hours spent vs revenue generated (CAC)
- **Marketplace Fit:** Are families/operators using provider directory?
- **Provider Satisfaction:** Are providers happy? (NPS 40+)

Go/No-Go Decision:

- **GO:** If providers generating \$500+ MRR, growing 10%+ month-over-month, positive feedback
 - **SLOW:** If <\$500 MRR but growing, mixed feedback (iterate, don't scale yet)
 - **NO-GO:** If <\$300 MRR, flat/declining, negative feedback (deprioritize, revisit Year 2)
-

Provider Categories Deep Dive

Transportation Services

Beta Target: 4-5 providers

Acquisition Strategy:

- Google search: "medical transport [city]", "senior shuttle [city]"
- Yelp: Transportation category + senior services filter
- Senior center partnerships: Who do they recommend?

Value Proposition:

“Reach families needing reliable transportation for aging parents. Get listed in front of families actively making care decisions.”

Success Metrics:

- Inquiries/month: 3-6 per provider
- Conversion rate: 30-40% (inquiry → booking)
- Average booking value: \$50-\$150

Featured Provider (Template for Outreach):

“We’re working with Golden Gate Senior Transport in SF—they’re getting 5-8 inquiries per month from families using CareLink AI.”

Housekeeping Services

Beta Target: 3-4 providers

Acquisition Strategy:

- Google search: “senior housekeeping [city]”, “elder cleaning services”
- Nextdoor: Local cleaning companies serving seniors
- Operator referrals: Who do facilities recommend for private homes?

Value Proposition:

“Connect with families who need trusted housekeeping for aging parents’ homes. Build recurring client relationships.”

Success Metrics:

- Inquiries/month: 2-5 per provider
 - Conversion rate: 40-50% (inquiry → booking)
 - Average client value: \$400-\$800/month (recurring)
-

Food Services

Beta Target: 3-4 providers

Acquisition Strategy:

- Google search: “senior meal delivery [city]”, “meals for elderly [city]”
- Senior center partnerships: Who provides meals?
- Home health agency referrals

Value Proposition:

“Reach seniors and families looking for meal solutions. Get recurring clients through our platform.”

Success Metrics:

- Inquiries/month: 3-5 per provider
 - Conversion rate: 30-40%
 - Average client value: \$300-\$600/month (recurring)
-

Medical Equipment Suppliers

Beta Target: 3-4 providers

Acquisition Strategy:

- Google search: “medical equipment [city]”, “wheelchair rental [city]”
- Discharge planner referrals (they refer families post-hospital)
- State DME supplier databases

Value Proposition:

“Be the go-to equipment provider for families transitioning to senior care. Get referrals from discharge planners and care facilities.”

Success Metrics:

- Inquiries/month: 4-8 per provider
 - Conversion rate: 40-50%
 - Average order value: \$500-\$2,000 (one-time or rental)
-

Pharmacy Services

Beta Target: 2-3 providers

Acquisition Strategy:

- Google search: “long-term care pharmacy [city]”
- Operator referrals (facilities need pharmacy partners)
- State pharmacy board directories

Value Proposition:

“Partner with care facilities and reach families needing specialized pharmacy services.”

Success Metrics:

- Inquiries/month: 2-4 per provider
 - Conversion rate: 50-60% (high intent)
 - Average client value: \$200-\$500/month (recurring prescriptions)
-

Home Health Services

Beta Target: 3-4 providers

Acquisition Strategy:

- Google search: “home health [city]”, “in-home nursing [city]”
- Discharge planner referrals (post-hospital care)
- State licensing board directories (home health agencies)

Value Proposition:

“Get qualified referrals from discharge planners and families looking for in-home care alternatives.”

Success Metrics:

- Inquiries/month: 5-10 per provider

- Conversion rate: 30-40%
 - Average client value: \$1,500-\$5,000/month (recurring)
-

Physical Therapy Services

Beta Target: 2-3 providers

Acquisition Strategy:

- Google search: “in-home physical therapy [city]”, “mobile PT [city]”
- Discharge planner referrals (post-surgery rehab)
- Operator referrals (facilities need PT partners)

Value Proposition:

“Connect with seniors needing PT services. In-home providers can reach patients who can’t travel to clinics.”

Success Metrics:

- Inquiries/month: 3-6 per provider
 - Conversion rate: 40-50%
 - Average client value: \$800-\$2,000 (per course of treatment)
-

Other Services (Legal, Financial, Move Management)

Beta Target: 2-3 providers

Acquisition Strategy:

- LinkedIn: Elder law attorneys, senior financial advisors
- Senior move manager associations (NASMM)
- Estate planning seminars (local senior centers)

Value Proposition:

“Reach families navigating senior care transitions. Get qualified leads for estate planning, financial planning, and move management.”

Success Metrics:

- Inquiries/month: 2-4 per provider
 - Conversion rate: 30-40%
 - Average client value: \$2,000-\$10,000 (one-time or retainer)
-

Email Templates

Beta Recruitment Email Sequence

Email 1: Initial Outreach

Subject: Quick question about [Company Name]

Body:

Hi [First Name],

I came across [Company Name] **while** researching [service type] providers **in** [City].
 [Specific compliment: "I love that you specialize in senior transportation" or
 "Your 5-star reviews stood out"].

I'm building CareLink AI a marketplace connecting families looking **for** senior care services with trusted providers like you.

We're launching a free beta next month, and I'd love to have [Company Name] featured. Early providers get:

- Free premium listing (\$49/month value)
- "Founding Provider" badge (social proof)
- Direct leads from families actively searching
- Lock **in** 20% lifetime discount

Interested? Let's chat **for** 10 minutes: [Calendar link]

Or apply here: [Beta application link]

Best,
 [Your Name]
 Founder, CareLink AI
 [Your email] | [Your phone]

Email 2: Follow-Up (3 days later)

Subject: Re: Quick question about [Company Name]

Body:

Hi [First Name],

Following up on my email below. I know you're busy, so I'll keep this **short**:

We're helping providers like [Company Name] reach families who are actively looking **for** [service type] **in** [City].

Beta providers are getting early access **FREE** **for** 2 months + lifetime discount.

Would you be open to a quick 10-min call to learn more?

[Calendar link]

If now's not a good time, no problem just let me know when might work better.

Thanks,
 [Your Name]

Email 3: Break-Up Email (3 days later)

Subject: One last thing...

Body:

Hi [First Name],

I'll stop reaching **out** after this! But I wanted to ask:

Is reaching more families/facilities something you're actively working on? Or is it just not a priority right now?

If it's the latter, no problem—I'll take you off my list.

If it's the former, I'd love to show you what CareLink AI can **do for** [Company Name].

Either way, best of luck with your business!

[Your Name]

P.S. Here's what one of our beta providers (Golden Gate Senior Transport) said:
"I'm getting 5-8 qualified inquiries per month—way better than my old Google Ads."

Welcome Email (Automated)

Subject: Welcome to CareLink AI! Here's what's next 

Body:

Hi [First Name],

Welcome to CareLink AI! We're excited to have [Company Name] on board.

Here's what happens next:

- 1 **Complete Your Profile** (15-20 min)
 Log **in** here: [Dashboard link]
 Add your business info, services, photos, and service area.
- 2 **We Review & Approve** (1-2 days)
 We'll verify your info and publish your profile.
- 3 **Go Live & Start Getting Leads!**
 Once live, families can find you and send inquiries.

 **Pro Tip:** Providers with complete profiles (photos, detailed descriptions) get 3x more inquiries than those with basic listings.

Questions? Reply to this email or book a call: [Calendar link]

Let's grow your business together!

[Your Name]

Founder, CareLink AI

Beta-to-Paid Conversion Email (Week 6 of Beta)

Subject: Important update about CareLink AI (beta ending soon)

Body:

Hi [First Name],

First, thank you **for** being part of our provider beta! Your feedback has been invaluable.

Quick heads up: Our beta program is ending **in** 2 weeks (February 28), and we'll be launching paid plans on March 1.

Here's what's coming:

- **FREE Basic:** All the essentials (listing, contact info, reviews)
- **Premium (\$49/month):** Featured placement, lead tracking, respond to reviews, priority support
- **Premium Plus (\$99/month):** Top placement, B2B operator network access, exclusive discounts

As a Founding Provider, you'll get an exclusive offer next week (30% off Year 1 + 20% lifetime discount).

Your profile will automatically move to the FREE Basic tier on March 1, so you won't lose your listing.

But **if** you're getting value from CareLink AI (leads, inquiries, bookings), I'd love to chat about Premium before the beta ends.

[Book a quick call]

Grateful **for** your support,
[Your Name]

Founding Provider Offer Email (Week 8 of Beta)

Subject: Your Exclusive Founding Provider Offer (Expires March 7) 

Body:

Hi [First Name],

You've been with us since Day 1, and your feedback shaped CareLink AI into what it is today.

As a Founding Provider, you get an exclusive offer that no one **else** will ever get:

 **YOUR FOUNDING PROVIDER RATE:**

- 30% OFF Year 1
- Lifetime 20% discount after that
- "Founding Provider" badge forever (social proof)
- Priority support **for** life

Premium Plan Example:

- Regular price: \$49/month (\$588/year)
- Your Year 1 price: \$34/month (\$408/year) Save \$180
- Your Year 2+ price: \$39/month forever Save \$120/year

[Claim Your Founding Provider Rate]

This offer is only **for** our 25 beta providers. After March 7, standard pricing applies.

Questions? Reply to this email or call me: [Your phone]

Thank you **for** believing **in** CareLink AI from the beginning.

[Your Name]

P.S. If you want to stick with FREE Basic, that's totally fine! Your listing will stay live. But **if** you're serious about growing your business through CareLink AI, Premium is the way to go (and you'll never get a better deal than this).

Partnership Agreement Template

CareLink AI Provider Agreement

This Agreement is entered into as of [Date] between:

CareLink AI ("Platform")

[Address]

[Email]

AND

[Provider Company Name] ("Provider")

[Address]

[Email]

[License # (if applicable)]

1. Services

1.1 Platform Services:

CareLink AI provides an online marketplace connecting families and care facilities with service providers in the senior care industry.

1.2 Provider Services:

Provider offers the following services: [Transportation / Housekeeping / Food Services / Medical Equipment / Pharmacy / Home Health / Physical Therapy / Other]

2. Provider Obligations

2.1 Profile Accuracy:

Provider agrees to maintain accurate, up-to-date information on their CareLink AI profile, including:

- Business name, contact info, service area
- Licensing and insurance documentation
- Pricing (if applicable)
- Photos and descriptions

2.2 Response Time:

Provider agrees to respond to inquiries within 24 hours (business days).

2.3 Quality Standards:

Provider agrees to:

- Maintain required licenses and insurance
- Provide professional, quality services
- Treat families and operators with respect and integrity
- Comply with all applicable laws and regulations

2.4 Prohibited Conduct:

Provider agrees NOT to:

- Spam or harass families/operators
 - Misrepresent services or credentials
 - Charge hidden fees or engage in deceptive practices
 - Circumvent the platform (e.g., ask customers to contact off-platform to avoid fees)
-

3. Pricing & Payment

3.1 Subscription Plans:

Provider selects one of the following plans:

- **FREE Basic:** \$0/month (basic listing, up to 3 service categories)
- **Premium:** \$49/month or \$470/year (featured placement, advanced analytics, up to 10 categories)
- **Premium Plus:** \$99/month or \$950/year (top placement, B2B access, unlimited categories)

3.2 Payment Terms:

- Monthly plans: Billed monthly via credit card (auto-renew)
- Annual plans: Billed annually in advance (non-refundable after 14 days)
- Free plan: No payment required

3.3 Cancellation:

- Provider may cancel anytime (self-serve via Customer Portal)
 - No refunds for monthly plans (billing stops at end of current period)
 - Annual plans: No refund after 14 days
-

4. CareLink AI Obligations

4.1 Platform Access:

CareLink AI provides Provider with access to the online marketplace and provider dashboard.

4.2 Lead Generation (Paid Plans):

CareLink AI will use reasonable efforts to generate leads for Provider, but does NOT guarantee any specific volume or quality of leads.

4.3 Support:

- FREE Basic: Email support (48-hour response time)
 - Premium: Email + phone support (24-hour response time)
 - Premium Plus: Priority support (same-day response time)
-

5. Verification & Approval

5.1 Provider Verification:

CareLink AI reserves the right to verify Provider's:

- Business license (if applicable)
- Insurance (general liability, professional liability)
- Background (BBB rating, online reviews)

5.2 Profile Approval:

CareLink AI reserves the right to approve or deny any provider profile. Reasons for denial may include:

- Unlicensed or uninsured (where required)
- Poor reputation (BBB complaints, negative reviews)
- Outside service area
- Incomplete or low-quality profile

5.3 Profile Removal:

CareLink AI may remove Provider's profile at any time for:

- Violation of this Agreement
 - Complaints from families or operators
 - Inactivity (no response to inquiries for 30+ days)
 - Illegal or unethical conduct
-

6. Intellectual Property

6.1 Platform Ownership:

CareLink AI owns all rights to the platform (website, code, design, trademarks).

6.2 Provider Content:

Provider grants CareLink AI a license to display Provider's content (photos, descriptions, logo) on the platform.

6.3 Reviews:

Reviews posted by families/operators are owned by CareLink AI. Provider may respond to reviews but may not delete or manipulate them.

7. Liability & Indemnification

7.1 Platform Disclaimer:

CareLink AI is a MARKETPLACE ONLY. We do NOT provide services directly. We do NOT guarantee quality, safety, or suitability of any Provider.

7.2 Provider Liability:

Provider is solely responsible for:

- Quality and safety of services provided
- Compliance with all laws and regulations
- Any disputes with families or operators
- All insurance and licensing requirements

7.3 Indemnification:

Provider agrees to indemnify and hold harmless CareLink AI from any claims arising from Provider's services or conduct.

8. Termination

8.1 Termination by Provider:

Provider may terminate this Agreement at any time by canceling their subscription.

8.2 Termination by CareLink AI:

CareLink AI may terminate this Agreement immediately for:

- Violation of terms
 - Illegal conduct
 - Complaints or safety concerns
 - Non-payment (paid plans)
-

9. Miscellaneous

9.1 Governing Law:

This Agreement is governed by the laws of [State].

9.2 Entire Agreement:

This Agreement constitutes the entire agreement between the parties.

9.3 Modifications:

CareLink AI may modify this Agreement at any time (30 days' notice).

AGREED AND ACCEPTED:**Provider:**

Signature: _____

Name: [Printed Name]

Title: [Title]

Date: [Date]

CareLink AI:

Signature: _____

Name: [Your Name]

Title: Founder

Date: [Date]

Summary & Next Steps

Year 1 Provider Strategy (TL;DR)

Goal: Add Providers as the 5th persona to complete the CareLink AI marketplace

Approach:

- **Freemium Model:** Free basic listing + paid premium (\$49-\$99/month)
- **Beta Phase:** 20-30 providers (Month 1-2), all free
- **Paid Launch:** Month 3 (40-60% beta → paid with Founding Provider discount)
- **Scale:** 100 providers by Month 12 (73 free, 27 paid)

Revenue Impact:

- Month 12 Provider MRR: \$1,773
- Year 1 Provider Revenue: \$7,860
- Total Platform MRR (with Operators): \$17,163 (+12% vs without providers)

Time Investment:

- Month 1-2 (Beta): 2-3 hours/day (recruitment + onboarding)
- Month 3-6: 1-2 hours/day (engagement + conversion)
- Month 7-12: 1 hour/day (maintenance + growth)

Success Metrics:

- Provider sign-ups: 100 by Month 12
 - Free-to-paid conversion: 20-27%
 - Provider churn: <5%
 - GMV generated: \$50K-\$100K
-

Next Steps

1. **Review this strategy document** (you're here!)
2. **Update Master Launch Plan** (add Provider sections)
3. **Build provider prospect list** (Week 1-2)
4. **Launch beta recruitment** (Week 3-4)
5. **Onboard beta providers** (Week 5-6)
6. **Collect feedback + iterate** (Week 7-8)
7. **Launch paid provider plans** (Month 3)

8.  **Scale to 100 providers** (Month 3-12)

Let's make CareLink AI the ultimate senior care marketplace—for families, operators, caregivers, discharge planners, AND providers! 

Document Prepared by: [Your Name], Founder, CareLink AI

Date: February 2, 2026

Questions? Email [your@email.com] or book a call: [calendar link]