

# CareLinkAI Demo Walkthrough Script

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## Overview

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This document provides a **5-10 minute scripted demo** covering the key workflows of CareLinkAI for live walkthroughs with ALFs, agencies, and investors.

**Demo Personas:** All use password `DemoUser123!`

- demo.family@carelinkai.test
- demo.operator@carelinkai.test
- demo.aide@carelinkai.test
- demo.provider@carelinkai.test
- demo.admin@carelinkai.test

**Demo Portal:** Access all persona cards at `/demo` for quick switching between accounts.

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## Demo Flow (10 minutes)

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### Part 1: Family Flow (3 minutes)

**Goal:** Show how families find care and submit inquiries

#### Step 1: Login as Family Member

1. Navigate to `/auth/login` (or use `/demo` portal)
2. Login with:
  - Email: demo.family@carelinkai.test
  - Password: DemoUser123!
3. **Say:** "This is Jennifer Martinez. She's caring for her 82-year-old mother with early-stage Alzheimer's."

#### Step 2: View Care Context

1. Navigate to `/settings/family`
2. **Say:** "Jennifer has filled out her care context - her mother's age, diagnosis, mobility level, and care needs."
3. Point out key fields:
  - Recipient age: 82
  - Diagnosis: Early-stage Alzheimer's
  - Mobility: Needs Assistance
  - Care notes: Detailed care requirements
4. **Say:** "This information helps us match her with the right caregivers and agencies."

#### Step 3: Browse Marketplace

1. Navigate to `/marketplace/aides`
2. **Say:** "Jennifer can browse individual caregivers. Look at Sarah Thompson here - 7 years of Alzheimer's care experience, \$32/hour."
3. Scroll through a few caregiver cards

4. Click on a caregiver profile to show detail page
5. **Say:** "She can see their full bio, credentials, availability, and reviews."
6. Click "Request Care" button
7. **Say:** "With one click, Jennifer can submit an inquiry to this caregiver."

#### Step 4: Browse Providers

1. Navigate to `/marketplace/providers`
2. **Say:** "Or she can browse home care agencies like Golden Years Home Care."
3. Click on a provider to show detail page
4. Point out:
  - Services offered
  - Coverage area
  - Years in business
  - Verification badge
5. **Say:** "Verified providers have been vetted by our admin team."

#### Step 5: Check Messages

1. Navigate to `/messages`
2. **Say:** "Jennifer can see all her conversations in one place - with caregivers, agencies, and our operators who help coordinate care."
3. Click on a conversation to show message thread
4. **Say:** "Real-time messaging keeps everyone on the same page."

**Transition:** "Now let's see how our operators manage these inquiries..."

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## Part 2: Operator Flow (2 minutes)

**Goal:** Show lead management and care coordination

### Step 1: Logout and Login as Operator

1. Logout from family account
2. Login with:
  - Email: `demo.operator@carelinkai.test`
  - Password: `DemoUser123!`
3. **Say:** "This is Michael Chen, one of our operators who coordinates care matches."

### Step 2: View Lead Dashboard

1. Navigate to `/operator/leads`
2. **Say:** "Michael sees all family inquiries here - leads from families to caregivers and agencies."
3. Point out:
  - Lead status badges (NEW, IN\_REVIEW, CONTACTED)
  - Target type (AIDE vs PROVIDER)
  - Assignment column
4. **Say:** "Leads can be filtered by status, type, and assigned operator."

### Step 3: Open a Lead Detail

1. Click on a lead (preferably one with status IN\_REVIEW)
2. Navigate to `/operator/leads/[id]`
3. **Say:** "Here's a detailed view of Jennifer's inquiry to Golden Years Home Care."

4. Scroll through sections:
  - **Family Information:** Contact details, relationship to recipient
  - **Provider Information:** Business details and contact
  - **Inquiry Details:** Start date, hours per week, location, message
  - **Care Context:** Mother's age, diagnosis, mobility, notes
5. **Say:** "All the information an operator needs to facilitate the match."

#### Step 4: Update Lead Status

1. Change status dropdown from "IN\_REVIEW" to "CONTACTED"
2. Add operator notes: "Spoke with Robert at Golden Years. They have availability and are scheduling an intro call with Jennifer for next week."
3. Click "Save Changes"
4. **Say:** "Michael updates the status and adds notes for the team. This keeps everyone informed."

#### Step 5: Open Conversation

1. Click "Open Conversation" button
2. **Say:** "Michael can message Jennifer directly to coordinate the introduction."

**Transition:** "Let's see what this looks like from the caregiver's side..."

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### Part 3: Aide/Caregiver Flow (2 minutes)

**Goal:** Show caregiver profile, credentials, and messaging

#### Step 1: Logout and Login as Aide

1. Logout from operator account
2. Login with:
  - Email: demo.aide@carelinkai.test
  - Password: DemoUser123!
3. **Say:** "This is Sarah Thompson, an experienced Alzheimer's care specialist."

#### Step 2: View Caregiver Profile

1. Navigate to `/settings/aide`
2. **Say:** "Sarah's profile highlights her 7 years of experience, \$32 hourly rate, and specialties."
3. Point out:
  - Bio section
  - Skills and certifications
  - Availability calendar
  - Background check status: CLEAR
4. **Say:** "A complete profile helps families make informed decisions."

#### Step 3: View Credentials

1. Navigate to `/settings/credentials`
2. **Say:** "Caregivers can upload and manage their credentials - CPR, CNA license, TB test results."
3. Point out verification status
4. **Say:** "Our admin team verifies these documents to build trust."

#### Step 4: Check Messages

1. Navigate to `/messages`
2. **Say:** "Sarah sees inquiries from families and operators. She can respond directly."

3. Open a message thread with demo.family
4. **Say:** “Here’s Jennifer’s inquiry. Sarah can reply to discuss availability and rates.”

**Transition:** “Agencies work similarly. Let’s quickly look at the provider view...”

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## Part 4: Provider Flow (1.5 minutes)

**Goal:** Show provider profile, services, and inquiries

### Step 1: Logout and Login as Provider

1. Logout from aide account
2. Login with:
  - Email: demo.provider@carelinkai.test
  - Password: DemoUser123!
3. **Say:** “This is Golden Years Home Care, a 15-year-old agency serving the Bay Area.”

### Step 2: View Provider Profile

1. Navigate to `/settings/provider`
2. **Say:** “Providers can showcase their business - services, coverage area, insurance info.”
3. Point out:
  - Business name and contact details
  - Service types (Personal Care, Dementia Care, etc.)
  - Coverage area (San Francisco, Oakland, San Jose)
  - Years in business: 15
  - Verified badge
4. **Say:** “Verified providers have uploaded their licenses and insurance documents.”

### Step 3: View Credentials

1. Navigate to `/settings/credentials`
2. **Say:** “Just like caregivers, providers upload their credentials - business licenses, liability insurance, etc.”

### Step 4: Check Messages

1. Navigate to `/messages`
2. **Say:** “Golden Years receives inquiries from families and can respond to schedule consultations.”

**Transition:** “Finally, let’s see the admin tools that keep our marketplace trustworthy...”

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## Part 5: Admin Flow (1.5 minutes)

**Goal:** Show provider/aide verification and management

### Step 1: Logout and Login as Admin

1. Logout from provider account
2. Login with:
  - Email: demo.admin@carelinkai.test
  - Password: DemoUser123!
3. **Say:** “This is our admin view for platform management.”

## Step 2: View Provider Management

1. Navigate to `/admin/providers`
2. **Say:** "Admins can see all providers and their verification status."
3. Point out:
  - Provider cards with business names
  - Verification badges
  - Service types
  - Years in business
4. **Say:** "We can filter by verification status, service types, and location."

## Step 3: Open a Provider Detail

1. Click on a provider (preferably one with verified status)
2. **Say:** "Here's the full provider profile with credentials."
3. Point out:
  - Credentials section with verification status
  - Contact information
  - Coverage area
4. **Say:** "Admins can review uploaded documents and toggle verification status."

## Step 4: View Caregiver Management (if time permits)

1. Navigate to `/admin/aides`
2. **Say:** "We have similar tools for managing individual caregivers."
3. Point out caregiver cards with background check status
4. **Say:** "This ensures only qualified, vetted caregivers appear in our marketplace."

## Step 5: View Platform Metrics

1. Navigate to `/admin/metrics`
2. **Say:** "Our metrics dashboard gives us real-time visibility into platform health and growth."
3. Scroll through the dashboard sections:
  - **Overview Cards:** Point out total users, leads, active aides, and active providers
  - **User Metrics:** Show growth by role (family, caregivers, providers)
  - **Lead Metrics:** Highlight leads by status and target type
  - **Marketplace Metrics:** Point out verified vs unverified providers, background check status
  - **Engagement Metrics:** Show message activity
4. **Say:** "This helps us track growth, identify bottlenecks, and measure platform traction."
5. Point to specific metrics:
  - "We've had X new families sign up in the last 7 days"
  - "We have Y leads in 'IN\_REVIEW' status - these need operator attention"
  - "Z% of our providers are verified, showing our commitment to quality"
6. **Say:** "These metrics help us make data-driven decisions about where to focus our efforts."

### Use Case for Investors:

- Emphasize growth metrics (new users last 7/30 days)
  - Highlight lead volume as proof of demand
  - Show provider verification as quality indicator
  - Point out engagement metrics (messages) as usage proof
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## Demo Wrap-Up

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### Key Points to Emphasize:

#### 1. For Families:

- Easy browsing of caregivers and agencies
- Detailed profiles with credentials and reviews
- Direct messaging and inquiry submission
- Care context helps match with right providers

#### 2. For Operators:

- Centralized lead management
- Status tracking and assignment
- Full visibility into family needs and provider availability
- Built-in messaging for coordination

#### 3. For Caregivers/Providers:

- Professional profiles to showcase experience
- Credential management and verification
- Direct inquiries from families
- Streamlined communication

#### 4. For Admins:

- Verification tools for trust and safety
- Provider and caregiver management
- Oversight of marketplace quality

### Closing Statement:

“CareLinkAI brings together families, caregivers, agencies, and operators into one seamless platform. We’re making senior care more accessible, transparent, and efficient for everyone involved.”

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## Demo Tips

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### Before the Demo

1. Run `npm run seed:demo` to ensure fresh data
2. Test login for all 5 personas
3. Open `/demo` portal in a browser tab for quick persona switching
4. Have a second browser/incognito window ready for showing multiple views simultaneously
5. Check that all messages and leads are populated

### During the Demo

1. **Start with the problem:** “Finding quality senior care is hard for families. Coordinating that care is hard for operators. We solve both.”
2. **Use realistic language:** Refer to personas by name (Jennifer, Michael, Sarah)
3. **Highlight key features:**
  - Care context matching
  - Real-time messaging
  - Credential verification
  - Lead management

4. **Show, don't tell:** Click through actual flows rather than just describing them

5. **Customize to audience:**

- For ALFs: Focus on operator and family flows
- For agencies: Focus on provider flow and marketplace visibility
- For investors: Show all flows and emphasize scalability

## After the Demo

1. Offer to create a custom demo account for their organization
2. Provide access to documentation
3. Schedule follow-up to discuss integration or pilot program



## Quick Reference: Key URLs

Flow	URL	Purpose
Demo Portal	/demo	Access all persona cards
Login	/auth/login	Login page
Family Profile	/settings/family	Care context
Browse Aides	/marketplace/aides	Caregiver marketplace
Browse Providers	/marketplace/providers	Agency marketplace
Messages	/messages	Messaging interface
Operator Leads	/operator/leads	Lead management
Lead Detail	/operator/leads/[id]	Individual lead view
Aide Profile	/settings/aide	Caregiver profile
Provider Profile	/settings/provider	Agency profile
Credentials	/settings/credentials	Credential management
Admin Providers	/admin/providers	Provider admin
Admin Aides	/admin/aides	Caregiver admin
Admin Metrics	/admin/metrics	Platform analytics dashboard

## Alternative Demo Flows

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### Quick Demo (5 minutes)

1. Family Flow (2 min): Care context → Browse → Submit inquiry
2. Operator Flow (2 min): View leads → Update status
3. Admin Flow (1 min): Provider verification

### Deep Dive Demo (15 minutes)

Include all 5 flows above plus:

- Show filters and search on marketplace
- Demonstrate favorites functionality
- Show message thread continuity across personas
- Walk through credential upload and verification process
- Explain AI matching (future roadmap)

### Role-Specific Demos

#### For Assisted Living Facilities:

- Focus on operator flow and family flow
- Emphasize lead management and coordination
- Show how operators can assign leads and track status

#### For Home Care Agencies:

- Focus on provider flow and marketplace visibility
- Show credential verification and trust badges
- Demonstrate inquiry management and messaging

#### For Investors:

- Show full end-to-end flow
- Emphasize marketplace network effects
- Highlight scalability (multiple operators, providers, families)
- **Demo the metrics dashboard** ( `/admin/metrics` ) to show:
  - Platform growth (new users by role)
  - Lead volume and conversion (proof of demand)
  - Supply-side health (active providers and caregivers)
  - Engagement levels (message activity)
  - Discuss future features (AI matching, advanced analytics)

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## Related Documentation

- [DEMO\\_ACCOUNTS.md](#) (`./DEMO_ACCOUNTS.md`) - Full account details and test data
- [METRICS\\_OVERVIEW.md](#) (`./METRICS_OVERVIEW.md`) - Platform metrics and analytics documentation
- [PROVIDER\\_MVP\\_IMPLEMENTATION\\_SUMMARY.md](#) (`./PROVIDER_MVP_IMPLEMENTATION_SUMMARY.md`) - Provider technical documentation
- [family\\_profile\\_implementation.md](#) (`../family_profile_implementation.md`) - Family technical documentation