

# CareLinkAI Demo Walkthrough Script

---

## Overview

---

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.

---



## Persona Dashboards

---

Each role lands on a personalized dashboard after login that shows relevant metrics and quick actions:

### Family Dashboard ( `/dashboard` )

After logging in as **demo.family@carelinkai.test**:

- **Tiles Display:**
  - Home Inquiries count (active care home requests)
  - Aide/Provider Requests count (open caregiver inquiries)
  - Total Activity (sum of all active requests)
- **Quick Actions:**
  - Search Homes → Browse care facilities
  - Find Caregivers → View aide marketplace
  - Find Providers → View service providers
- **Recent Activity:** List of recent inquiries with status badges

### Operator Dashboard ( `/operator` )

After logging in as **demo.operator@carelinkai.test**:

- **Tiles Display:**
  - Total Homes managed
  - Open Inquiries with NEW count highlighted
  - Active Residents count
  - Occupancy Rate (color-coded by percentage)
- **Critical Alerts:** Banner for new inquiries and expiring licenses
- **Recent Activity:** Table of 5 most recent inquiries
- **Quick Actions:** Add Home, Add Resident, View Inquiries

### Caregiver Dashboard ( `/caregiver` )

After logging in as **demo.aide@carelinkai.test**:

- **Tiles Display:**

- Profile Visibility (Visible/Hidden in marketplace)
- Background Check status
- Active Requests count
- **Alert:** Yellow banner if profile is hidden
- **Recent Activity:** List of family inquiries
- **Quick Actions:** Edit Profile, Upload Documents, Messages

## Provider Dashboard ( /provider )

After logging in as **demo.provider@carelinkai.test**:

- **Tiles Display:**
- New Inquiries (last 7 days)
- Active Inquiries count
- Verification Status
- **Alert:** Yellow banner if not verified
- **Recent Activity:** List of family inquiries
- **Quick Actions:** Edit Profile, Upload Documents, Messages

## Admin Dashboard ( /admin )

After logging in as **demo.admin@carelinkai.test**:

- **Tiles Display:**
- Total Users count
- Total Inquiries (home + leads)
- Active Caregivers count
- Verified Providers count
- **Alert:** Amber banner if credentials need review
- **Quick Access:** Links to Caregivers, Providers, Analytics, Tools
- **System Info:** Platform operational status

**Demo Tip:** Start each persona demo by showing their dashboard to establish context and highlight role-specific features.

## Demo Flow (10 minutes)

### 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..."

---

## 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..."

---

## 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...”

---

## 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...”

---

## 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 (Enhanced Dashboard)

1. Navigate to `/admin/metrics`
2. **Say:** “Our enhanced metrics dashboard gives us real-time visibility into platform health and growth.”
3. **Point out the “Last Updated” timestamp** (top-right corner):
  - “This shows when the data was last generated - we’re looking at live data from just moments ago.”
4. **Demonstrate the Time Range Toggle** (center of page):
  - Click “Last 7 Days” → Watch the Lead Trends cards highlight
  - Click “Last 30 Days” → See the emphasis shift
  - **Say:** “We can toggle between time ranges to see short-term momentum vs long-term trends.”

## 5. Click through the Clickable KPI Tiles:

- Click "Total Leads" → Navigates to `/operator/leads`
- **Say:** "Tiles deep-link to operational views - one click to drill down into details."
- Go back, click "Active Aides" → Navigates to `/marketplace/caregivers`
- Go back, click "Active Providers" → Navigates to `/admin/providers`
- **Say:** "This makes it easy to go from high-level metrics to specific actions."

## 6. Highlight the Key Ratios Section (gradient banner):

- **Verified Provider Rate:** "82% of our providers are verified - showing our commitment to quality."
- **Background Check Clear Rate:** "75% of aides have cleared background checks."
- **Leads per Provider:** "1.5 leads per provider shows balanced marketplace demand."
- **Leads per Aide:** "2.3 leads per aide indicates healthy interest from families."
- **Messages per Lead:** "6.9 messages per lead shows active engagement and conversation."
- **Say:** "These ratios help us understand marketplace health beyond raw numbers."

## 7. Scroll through other sections:

- **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 breakdown
- **Engagement Metrics:** Show message activity

## 8. Say: "This dashboard helps us track growth, identify bottlenecks, and measure platform traction."

## 9. Point to specific metrics based on the selected time range:

- "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, demonstrating our quality standards"

## Use Case for Investors:

- **Growth Metrics:** Emphasize new users by role (last 7/30 days) showing user acquisition momentum
- **Demand Proof:** Highlight total leads and recent lead volume (use time toggle to show trends)
- **Supply Quality:** Point to verification rates and background check metrics as differentiation
- **Engagement Proof:** Messages per lead and total message activity show real usage, not just signups
- **Marketplace Balance:** Leads per provider/aide ratios show supply-demand equilibrium
- **Operational Efficiency:** Clickable tiles demonstrate admin tools for scale
- **Data-Driven Culture:** Time range toggle and key ratios show commitment to actionable analytics

## Use Case for ALFs/Agencies:

- **Lead Volume:** Focus on active leads and conversion (NEW → CONTACTED → CLOSED)
- **Caregiver Quality:** Emphasize background check clear rate and verification rates
- **Response Time:** Messages per lead shows families are engaged and communicating
- **Marketplace Health:** Active aides and providers show robust supply



## Demo Wrap-Up

## 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.”

---



## **Demo Tips**

---

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



## Alternative Demo Flows

### 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)

---

## 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