

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
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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

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