

Cleveland/Ohio Geographic Launch Strategy

CareLink AI: Phased Expansion Roadmap

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Executive Summary

CareLink AI's geographic expansion strategy follows a deliberate, phased approach: **Cleveland → Ohio → Midwest → National**. This strategy leverages our founder's Cleveland roots, validates the marketplace model in a contained market, and scales systematically to capture the \$907 billion U.S. senior living market.

Phased Expansion Timeline

Phase	Timeline	Geographic Focus	Target Facilities	Target Revenue
Phase 1	Month 1-6	Cleveland Metro	15 sign-ups, 6-10 paying	\$720-\$1,200 MRR
Phase 2	Month 7-12	Ohio Statewide	100 sign-ups, 60-80 paying	\$7,200-\$9,600 MRR
Phase 3	Year 2	Midwest (5 states)	200-400 sign-ups, 120-240 paying	\$14,400-\$28,800 MRR
Phase 4	Year 3+	National	3,000-5,000 sign-ups	\$360,000-\$600,000 MRR

Core Strategic Rationale

Why Cleveland First?

1. **Founder Advantage:** Cleveland-based founders have local credibility and connections
2. **Contained Market:** 150 facilities = manageable for MVP validation
3. **Representative Market:** Mid-size city mirrors other Midwest metros
4. **Lower CAC:** In-person outreach costs less than digital/remote acquisition
5. **Press-Friendly:** "Local startup solving local problem" is compelling story

Why Ohio Second?

1. **Natural Expansion:** Cleveland success stories travel well within state
2. **State Associations:** OALA provides statewide platform (600+ members)
3. **Adjacent Markets:** Columbus (2 hrs), Cincinnati (4 hrs), Toledo (2 hrs) are drivable
4. **Similar Demographics:** Ohio cities have comparable senior populations and facility types
5. **Proof of Scalability:** 1,200 Ohio facilities proves model works beyond one city

Why Midwest Third?

1. **Regional Similarities:** Michigan, Indiana, Pennsylvania, Kentucky mirror Ohio
2. **Demographic Alignment:** Similar affordability, senior populations, facility density
3. **Playbook Refinement:** Ohio learnings apply directly to adjacent states
4. **Limited Competition:** Regional players easier to compete with than national in coastal markets

Why National Last?

1. **Capital Requirements:** National expansion requires significant funding
 2. **Competitive Intensity:** Coastal markets (CA, NY, FL) have more entrenched competitors
 3. **Operational Complexity:** Multi-region operations require mature team and infrastructure
 4. **Proven Model:** Midwest success de-risks national expansion for investors
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Phase 1: Cleveland Metro Launch (Month 1-6)

Market Overview

Target Geography:

- **Cleveland Proper:** Downtown, University Circle, neighborhoods
- **East Suburbs:** Shaker Heights, Beachwood, Cleveland Heights, University Heights
- **West Suburbs:** Westlake, Rocky River, Lakewood, North Olmsted
- **South Suburbs:** Parma, Independence, Seven Hills, Strongsville
- **North Suburbs:** Euclid, Wickliffe

Market Size:

- **Senior Population (65+):** 55,288 (15.04% of Cleveland metro)
- **Total Facilities:** 150-200 (AL, MC, IL, SNF)
- **Key Facility Clusters:** Shaker Heights (5-8), Beachwood (6-10), Westlake (4-6), Parma (6-8)

Why These Suburbs?

- **Shaker Heights:** Affluent, high senior population, multiple facilities
- **Beachwood:** Strong Jewish community, multiple senior communities
- **Westlake:** Growing, family-friendly, expanding senior services
- **Parma:** Large population, diverse income levels, established facilities

Phase 1 Goals (Month 1-6)

Acquisition Targets:

- **Operators:** 15 beta sign-ups → 6-10 paying conversions (40-67% conversion)
- **Families:** 50-100 family accounts
- **Caregivers:** 30-50 caregiver profiles
- **Discharge Planners:** 3-5 hospital partnerships (Cleveland Clinic, UH, MetroHealth)
- **Providers:** 15-20 local service providers (transportation, housekeeping, food services)

Revenue Targets:

- **MRR:** \$720-\$1,200
- **ARR:** \$8,640-\$14,400
- **ARPU:** \$120/month (blended avg)

Market Penetration:

- **Goal:** 4-7% of Cleveland facilities by Month 6
- **Brand Awareness:** Top 3 in “senior living” searches in Cleveland

Success Metrics:

- 10-20% market penetration by Month 6
- 3-5 local press mentions
- 50+ family searches per week
- 20+ caregiver job applications per month

Phase 1 Acquisition Tactics

1. In-Person Facility Outreach (Primary Channel)

Why In-Person Works in Cleveland:

- You're local = instant credibility
- Senior living is relationship-driven industry
- Face-to-face demos overcome tech hesitation
- Builds trust faster than cold emails

Execution Plan:

- **Weeks 1-2:** Build facility database (150 facilities with contacts)
- **Weeks 3-12:** Visit 5-10 facilities per week
- **Target Decision-Makers:** Executive Directors, Marketing Directors, Admissions Directors
- **Meeting Format:** 20-min pitch + 10-min demo + follow-up

Pitch Deck Key Points:

- Problem: "You're paying \$3,000-\$8,000 per referral to A Place for Mom"
- Solution: "CareLink AI: Free listing + \$99/month for premium features"
- Proof: "We're Cleveland-based. We're building this for YOU."
- Call-to-Action: "Sign up for free beta today. Be the first in Cleveland."

Outreach Cadence:

1. **Email Introduction:** Personalized email referencing their facility
2. **Phone Follow-Up:** 2-3 days later
3. **In-Person Visit:** Schedule 30-min meeting
4. **Demo & Onboarding:** Show platform, help them create profile
5. **Follow-Up:** 1 week later to check engagement

2. Local Association Membership & Networking

Ohio Assisted Living Association (OALA):

- **Join as Business Member:** \$200-500/year
- **Attend Events:** Monthly meetups, quarterly conferences
- **Sponsor an Event:** \$500-1,000 for visibility
- **Present at Conference:** "How Technology Can Reduce Referral Costs"

Cleveland Chamber of Commerce:

- Join chamber (\$300-500/year)
- Attend monthly business mixers
- Network with healthcare/senior services committee

Western Reserve Area Agency on Aging (WRAAA):

- Partner as resource for families
- Offer to be listed on their website
- Attend their community events

3. Cleveland Hospital Partnerships (Discharge Planners)

Target Hospitals:

- **Cleveland Clinic:** Multiple campuses, leading healthcare system
- **University Hospitals (UH):** UH Cleveland Medical Center + network
- **MetroHealth:** Main campus + community locations
- **Hillcrest Hospital:** South Euclid location
- **Fairview Hospital:** West side location

Outreach Strategy:

1. **Identify Discharge Planners:** Call main line, ask for “Case Management” or “Discharge Planning” department
2. **Email Introduction:** Introduce CareLink AI as free tool for discharge planning
3. **In-Person Demo:** 15-min demo showing real-time facility availability
4. **Provide Resources:** Leave behind one-pagers with QR code to platform
5. **Ongoing Support:** Monthly check-ins, updates on new facilities

Value Proposition for Discharge Planners:

- “Find available beds across Cleveland facilities in real-time”
- “Stop calling 10+ facilities—see availability instantly”
- “100% free tool for healthcare professionals”

4. Cleveland-Specific Content Marketing & SEO

Blog Post Schedule (2 posts/week for 12 weeks = 24 posts):

Week 1-4: Cleveland Neighborhood Guides

1. “The Complete Guide to Senior Living in Shaker Heights, Ohio”
2. “Beachwood Senior Living: Communities, Costs, and What to Expect”
3. “Westlake Senior Living: A Growing Hub for Active Retirees”
4. “Parma, Ohio Senior Living: Affordable Options for Northeast Ohio Families”
5. “Rocky River Senior Communities: Waterfront Living for Seniors”
6. “Cleveland Heights: Independent Living with Urban Convenience”
7. “Independence, OH Senior Living: Suburban Comfort Meets Quality Care”
8. “Lakewood Senior Living: Walkable, Vibrant, and Community-Focused”

Week 5-8: Cleveland Senior Living Guides

9. “Top 10 Assisted Living Communities in Cleveland, Ohio”
10. “Cleveland Memory Care: A Family’s Guide to Choosing the Right Facility”
11. “Cleveland vs. Suburbs: Where Should Your Loved One Retire?”
12. “The Cost of Senior Living in Cleveland: A 2026 Breakdown”
13. “Cleveland Independent Living: Best Communities for Active Seniors”
14. “How to Choose a Senior Living Community in Cleveland: 10-Step Checklist”
15. “Cleveland Senior Living Move-In Checklist: What to Bring, What to Leave”
16. “Paying for Senior Living in Cleveland: Medicaid, Veterans Benefits, and More”

Week 9-12: Cleveland Senior Resources

17. “Cleveland Senior Resources: Complete Directory for Older Adults”
18. “Cleveland Healthcare for Seniors: Top Hospitals and Geriatric Specialists”
19. “Cleveland Senior Activities: Staying Active and Engaged in Retirement”
20. “Cleveland Senior Transportation: Options for Getting Around”
21. “Cleveland Caregiver Jobs: How to Start a Career in Senior Care”
22. “Moving to Cleveland for Retirement: Pros, Cons, and What to Know”

23. "Cleveland Senior Centers: Free Programs and Activities"
24. "Cleveland Alzheimer's Support: Resources for Families"

SEO Keywords to Target:

- "senior living Cleveland"
- "assisted living Cleveland Ohio"
- "memory care Cleveland"
- "retirement communities Cleveland"
- "senior housing Cleveland"
- "assisted living Shaker Heights"
- "senior living Beachwood"
- "Cleveland nursing homes"
- "independent living Cleveland"
- "senior care Cleveland"

Content Distribution:

- Publish on CareLink AI blog
- Share on LinkedIn, Facebook
- Submit to Cleveland Plain Dealer opinion/community section
- Share with OALA, WRAAA for their newsletters

5. Local PR & Media Outreach

Target Media Outlets:

- **Cleveland Plain Dealer / cleveland.com** (news@cleveland.com)
- **Scene Magazine** (Cleveland alternative weekly)
- **Crain's Cleveland Business** (business/healthcare reporter)
- **WKYC (NBC), WEWS (ABC), WJW (Fox)** (local TV news)
- **WCPN (NPR Cleveland)** (public radio)
- **SeniorLivingNEO.com** (senior living guide)

Press Release Angles:

1. **Launch Announcement:** "Cleveland Startup Launches Tech Platform to Help Families Find Senior Care"
2. **Founder Story:** "Cleveland Entrepreneur Builds Solution After Personal Experience with Aging Parent"
3. **Market Gap:** "Why Cleveland Families Struggle to Find Senior Living—And How One Platform is Changing That"
4. **Beta Success:** "10 Cleveland Senior Living Communities Join New Marketplace Platform"

PR Timeline:

- **Month 1:** Soft launch, no PR (focus on building)
- **Month 2:** Press release to Cleveland Plain Dealer, Scene Magazine
- **Month 3:** Follow-up pitches to TV stations with beta success stories
- **Month 4-6:** Ongoing PR with facility testimonials, family stories

6. Cleveland Caregiver Recruitment

Target Channels:

- **Indeed / ZipRecruiter:** "Cleveland Senior Care Jobs" ads
- **Cleveland State University:** Career services, nursing program
- **Case Western Reserve University:** Frances Payne Bolton School of Nursing

- **Cuyahoga Community College:** Nursing and healthcare programs
- **Cleveland-area nursing homes:** Recruit staff looking for new opportunities

Job Posting Strategy:

- Help facilities post caregiver jobs for free (beta)
- Charge \$50/posting after beta period
- Promote CareLink AI as “the place to find Cleveland senior care jobs”

7. Cleveland Provider Directory

Target Service Providers:

- **Transportation:** Cleveland Senior Transportation Connection, local cab companies
- **Home Care:** Home Instead, Visiting Angels, local agencies
- **Food Services:** Local meal delivery, catering for seniors
- **Housekeeping:** Local cleaning services specializing in seniors
- **Medical Equipment:** DME suppliers, pharmacies
- **Financial Services:** Elder law attorneys, financial planners

Outreach:

- Join Cleveland Chamber of Commerce, network at events
- Offer free listings during beta (\$20-50/month after)
- Position as “easiest way to reach Cleveland senior living facilities”

Phase 1 Budget

Total Month 1-6 Budget: \$4,900 (per existing budget)

Cleveland-Specific Allocation:

- **OALA Membership:** \$200-500/year = **\$42/month**
- **Cleveland Chamber:** \$300-500/year = **\$42/month**
- **Local Event Sponsorships:** \$500-1,000/year = **\$83/month**
- **Cleveland Content Marketing:** (time, no cost)
- **Cleveland Ads (Google/Facebook):** **\$200/month** (geo-targeted)
- **In-Person Outreach (gas, parking, coffee):** **\$100/month**
- **Press Release Distribution:** **\$0** (DIY via email)
- **Total Cleveland-Specific:** **\$467/month or \$2,802 for 6 months**

Remaining Budget for Core Operations:

- Website hosting, tools, general marketing: **\$2,098**

Phase 1 Success Criteria

Must-Have Results by Month 6:

- 6-10 paying operator subscriptions
- \$720-\$1,200 MRR
- 4-7% market penetration in Cleveland
- 50+ active family users
- 3+ hospital partnerships
- 3+ local press mentions
- Positive operator testimonials (3-5)

Nice-to-Have Results by Month 6:

- 10-15 paying subscriptions (\$1,200-\$1,800 MRR)
- 10% market penetration
- 100+ family users

- 5+ hospital partnerships
- Local TV news feature

Decision Point at Month 6:

- **IF success criteria met:** Proceed to Phase 2 (Ohio expansion)
 - **IF falling short:** Extend Phase 1 for 2-3 more months, double down on Cleveland
 - **IF major issues:** Pivot strategy (pricing, features, target market)
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Phase 2: Ohio Statewide Expansion (Month 7-12)

Market Overview

Target Markets (Priority Order):

1. Columbus (Top Priority)

- State capital, largest Ohio city
- Population: ~900,000 (metro: 2.1M)
- Senior population: ~200,000 (65+)
- Facilities: 300-400
- Avg AL cost: \$3,600-\$6,042/month
- Why: Largest market, 2 hours from Cleveland, state government connections

2. Cincinnati (High Priority)

- Population: ~300,000 (metro: 2.2M)
- Senior population: ~175,000 (65+)
- Facilities: 250-350
- Avg AL cost: \$4,000-\$5,483/month
- Why: Large market, southern Ohio gateway, 4 hours from Cleveland

3. Toledo (Medium Priority)

- Population: ~270,000 (metro: 600K)
- Senior population: ~100,000 (65+)
- Facilities: 150-200
- Avg AL cost: \$3,900-\$5,259/month
- Why: Northern Ohio, 2 hours from Cleveland, more affordable market

4. Akron (Medium Priority)

- Population: ~190,000 (metro: 700K)
- Senior population: ~90,000 (65+)
- Facilities: 100-150
- Avg AL cost: \$4,320-\$5,823/month
- Why: 30 minutes from Cleveland, natural expansion, part of Greater Cleveland

5. Dayton (Lower Priority)

- Population: ~140,000 (metro: 800K)
- Senior population: ~110,000 (65+)
- Facilities: 150-200
- Avg AL cost: \$3,650-\$5,792/month
- Why: Western Ohio, 3.5 hours from Cleveland, rounds out statewide coverage

Total Ohio Addressable Market:

- **Facilities:** 1,000-1,500 across 5 major metros
- **Senior Population:** 2.1 million statewide
- **Market Opportunity:** \$7,200-\$36,000 MRR at 10-25% penetration

Phase 2 Goals (Month 7-12)

Acquisition Targets:

- **Total Ohio Operators:** 100 sign-ups → 60-80 paying conversions (60-80%)
- **Cleveland Growth:** 20-30 total facilities (10-20 additional from Phase 1)
- **Columbus:** 30-40 facilities
- **Cincinnati:** 20-30 facilities
- **Toledo/Akron/Dayton:** 20-30 combined

Revenue Targets:

- **MRR:** \$7,200-\$9,600
- **ARR:** \$86,400-\$115,200
- **ARPU:** \$120/month

Market Penetration:

- **Cleveland:** 20-30% (market leader)
- **Ohio Statewide:** 5-7%
- **Columbus/Cincinnati:** 10-15% each

Success Metrics:

- 60-80 paying Ohio operators by Month 12
- Top 3 brand awareness in Columbus, Cincinnati
- 200-400 family users statewide
- 5-10 Ohio hospital partnerships

Phase 2 Acquisition Tactics

1. Leverage Cleveland Success Stories

Cleveland Testimonial Campaign:

- Create 3-5 case studies with Cleveland operators
- Video testimonials (2-3 min) featuring Executive Directors
- Highlight results: "We filled 3 vacancies in 2 weeks using CareLink AI"
- Use in outreach emails, ads, website

Ohio Expansion Messaging:

- "Trusted by 20+ Cleveland senior living communities"
- "Now expanding statewide to serve all of Ohio"
- "Join Ohio's leading senior living marketplace"

2. Ohio Assisted Living Association (OALA) Partnership

OALA Statewide Strategy:

- **Upgrade to Sponsor:** \$1,000-2,000 for annual conference sponsorship
- **Exhibit at Conference:** Set up booth, live demos, collect contacts
- **Present Session:** "How Cleveland Facilities Are Reducing Referral Costs with Technology"
- **OALA Newsletter:** Sponsored content or featured article
- **OALA Directory:** Get listed as vendor/partner

OALA Member Outreach:

- Request OALA member list (600+ facilities)
- Segment by city: Columbus, Cincinnati, Toledo, etc.
- Personalized email: "CareLink AI is now available in [City]"

3. Virtual Outreach (No In-Person Yet)

Why Virtual for Phase 2:

- Ohio cities are 2-4 hours from Cleveland (travel time expensive)
- Virtual allows rapid scaling at lower CAC
- Cleveland in-person success proves model works

Virtual Outreach Sequence:

1. **Email #1 (Day 1):** Introduction with Cleveland success stories
2. **Email #2 (Day 4):** Case study + special Ohio launch offer
3. **Phone Call (Day 7):** Personal call from founder
4. **Email #3 (Day 10):** Demo video + "Last chance for launch pricing"
5. **LinkedIn Connection (Day 14):** Connect, share content
6. **Email #4 (Day 21):** Final follow-up with testimonial

Email Template (Columbus Outreach):

Subject: Cleveland's #1 Senior Living Marketplace is Now in Columbus

Hi [First Name],

I'm [Your Name], founder of CareLink AI. We just launched Ohio's first modern marketplace **for** senior living and after success with 20+ Cleveland facilities, we're bringing it to Columbus.

Here's what CareLink AI does:

- Free facility profile + dashboard
- Connect with families actively searching
- Find caregivers, providers, discharge planners
- Premium features: \$99/month (vs. \$5,000+ per A Place **for** Mom referral)

Would you be open to a 15-minute demo this week?

[Cleveland facility testimonial quote]

Thanks,
[Your Name]

4. Ohio-Specific Content Marketing

Create City-Specific Content:

- "Top 10 Senior Living Communities in Columbus, Ohio"
- "Cincinnati Senior Living: Costs, Neighborhoods, and Options"
- "Toledo Senior Living Guide: Affordable Retirement on Lake Erie"
- "Akron vs. Cleveland Senior Living: Which is Right for Your Family?"
- "Dayton, Ohio Senior Resources: A Complete Guide"

SEO Strategy:

- Target "[City] senior living" keywords
- Build backlinks from local directories
- Guest post on local senior blogs/sites

5. Digital Advertising (Ohio-Wide)

Google Ads (Month 7-12):

- **Budget:** \$200/month = \$1,200 for 6 months
- **Targeting:** Ohio cities (Columbus, Cincinnati, Toledo, Akron, Dayton)
- **Keywords:** “[City] senior living,” “[City] assisted living,” “find senior care [City]”
- **Landing Pages:** City-specific pages with local facilities

Facebook/Instagram Ads:

- **Budget:** \$200/month = \$1,200 for 6 months
- **Targeting:** Adults 40-65 in Ohio (caregivers for aging parents)
- **Creative:** Testimonials from Cleveland families
- **Call-to-Action:** “Find senior care in [City]”

6. Ohio Hospital Partnerships

Target Major Hospitals:

- **Columbus:** Ohio State University Wexner Medical Center, Riverside Methodist, Mount Carmel
- **Cincinnati:** Cincinnati Children's, UC Medical Center, Christ Hospital
- **Toledo:** ProMedica Toledo Hospital, Mercy Health St. Vincent
- **Akron:** Summa Health, Akron General, Cleveland Clinic Akron
- **Dayton:** Miami Valley Hospital, Kettering Health, Dayton Children's

Outreach: Same discharge planner strategy as Cleveland (virtual demos)

7. Ohio Media Outreach

Target Publications:

- **Columbus:** Columbus Dispatch, Columbus Business First
- **Cincinnati:** Cincinnati Enquirer, Cincinnati Business Courier
- **Toledo:** Toledo Blade
- **Akron:** Akron Beacon Journal
- **Dayton:** Dayton Daily News

Press Release: “Cleveland-Based CareLink AI Expands Statewide, Partners with 100+ Ohio Senior Living Facilities”

Phase 2 Budget

Month 7-12 Additional Budget: \$10,000-15,000

Ohio Expansion Allocation:

- **OALA Sponsorship/Exhibit:** \$1,000-2,000
- **Google Ads:** \$200/month × 6 = \$1,200
- **Facebook Ads:** \$200/month × 6 = \$1,200
- **Virtual Outreach Tools:** (already covered)
- **Travel (1-2 Columbus trips):** \$500-1,000
- **Ohio PR/Content:** \$500
- **Total:** \$4,400-\$5,900

Revenue Offset:

- Phase 1 MRR (\$720-\$1,200) offsets costs by Month 7
- Expected Month 12 MRR: \$7,200-\$9,600 = **\$86K-\$115K ARR**

Phase 2 Success Criteria

Must-Have Results by Month 12:

- 60-80 paying Ohio operator subscriptions
- \$7,200-\$9,600 MRR
- 5-7% Ohio market penetration
- 20-30% Cleveland market penetration
- 200+ active family users statewide
- 10+ testimonials/case studies
- Positive unit economics (LTV > 10x CAC)

Decision Point at Month 12:

- **IF success criteria met:** Proceed to Phase 3 (Midwest expansion)
 - **IF strong growth trajectory:** Raise seed funding (\$250K-\$500K) for Phase 3 acceleration
 - **IF mixed results:** Refine Ohio strategy, hire Ohio sales rep, extend Phase 2
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Phase 3: Midwest Expansion (Year 2)

Market Overview

Target States (Priority Order):

1. Michigan

- Major cities: Detroit (metro: 4.3M), Grand Rapids (metro: 1.1M)
- Why: Adjacent to Ohio, similar demographics, 3-4 hour drive from Cleveland
- Facilities: 500-700

2. Indiana

- Major cities: Indianapolis (metro: 2.1M), Fort Wayne (metro: 400K)
- Why: Adjacent to Ohio, affordable market, 3-4 hours from Cleveland
- Facilities: 400-600

3. Pennsylvania (Western)

- Major cities: Pittsburgh (metro: 2.4M), Erie (metro: 270K)
- Why: Eastern neighbor, Pittsburgh 2 hours from Cleveland
- Facilities: 400-600

4. Kentucky

- Major cities: Louisville (metro: 1.3M), Lexington (metro: 500K)
- Why: South of Cincinnati, natural expansion from Ohio
- Facilities: 300-500

5. West Virginia (Lower priority)

- Major cities: Charleston, Huntington
- Why: Smaller market, but adjacent to Ohio
- Facilities: 100-200

Total Midwest Addressable Market:

- **Facilities:** 1,700-2,600 across 5 states
- **Combined with Ohio:** 2,700-4,100 facilities
- **Market Opportunity:** \$14,400-\$48,000 MRR at 5-15% penetration

Phase 3 Goals (Year 2)

Acquisition Targets:

- **Total Midwest Operators:** 200-400 sign-ups → 120-240 paying (60%)
- **Ohio Maintenance:** Maintain 60-80 paying facilities
- **New States:** 60-160 paying facilities

Revenue Targets:

- **MRR:** \$14,400-\$28,800 (Ohio + Midwest)
- **ARR:** \$172,800-\$345,600
- **ARPU:** \$120/month

Market Penetration:

- **Ohio:** 8-12% (consolidate leadership)
- **Midwest:** 2-4% per state
- **Cleveland:** 30-40% (market dominance)

Team Expansion:

- Hire 1-2 sales reps (Michigan, Indiana)
- Part-time marketing coordinator
- Customer success manager

Phase 3 Acquisition Tactics

Leverage Ohio Playbook:

- Replicate OALA strategy with state associations in MI, IN, PA, KY
- Use Ohio testimonials in outreach
- Virtual-first outreach (proven in Phase 2)
- Targeted digital ads by state
- State-specific content (Top 10 Senior Living in [City])

Strategic Partnerships:

- Partner with 2-3 large operators with multi-state presence (Brookdale, Sunrise)
- Onboard their facilities across Midwest states
- Use as anchor tenants to attract others

Phase 3 Budget

Year 2 Budget: \$150,000-\$250,000

Funding Strategy:

- Raise seed round: \$250K-\$500K
- Use Ohio ARR (\$86K-\$115K) to fund operations
- Hire 2-3 employees

Allocation:

- **Sales Team:** \$80K-\$120K (2 reps)
- **Marketing:** \$30K-\$50K (ads, content, associations)
- **Technology:** \$20K-\$30K (platform improvements, integrations)
- **Operations:** \$20K-\$50K (tools, travel, admin)

Phase 3 Success Criteria

Must-Have Results by End of Year 2:

- 120-240 paying Midwest subscriptions

- \$14,400-\$28,800 MRR (\$172K-\$345K ARR)
- Positive cash flow or break-even
- 2-4% Midwest market penetration
- Proven sales team scaling model

Decision Point at End of Year 2:

- **IF success criteria met:** Proceed to Phase 4 (national expansion)
 - **IF strong metrics:** Raise Series A (\$2M-\$5M) for national scale
 - **IF challenges:** Consolidate Midwest, optimize unit economics before scaling
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Phase 4: National Expansion (Year 3+)

Market Overview

Target Regions:

1. **Southeast:** Florida, Georgia, North Carolina, South Carolina, Tennessee, Alabama
 - Why: High senior population (Florida = retirement capital), fast-growing
 - Facilities: 5,000-7,000
2. **Southwest:** Texas, Arizona, New Mexico
 - Why: Large markets (Texas = 2nd largest state), growing senior population
 - Facilities: 3,000-5,000
3. **West:** California, Washington, Oregon, Colorado, Nevada
 - Why: Affluent markets, high willingness to pay, tech-friendly
 - Facilities: 4,000-6,000
4. **Northeast:** New York, New Jersey, Massachusetts, Connecticut, Maryland
 - Why: Dense, affluent, high facility concentration
 - Facilities: 3,000-5,000
5. **Central/Mountain:** All remaining states
 - Facilities: 5,000-8,000

Total U.S. Addressable Market:

- **Facilities:** 75,000+ nationwide
- **Market Opportunity:** \$360K-\$900K MRR at 4-10% penetration

Phase 4 Goals (Year 3+)

Acquisition Targets:

- **Year 3:** 1,000-2,000 facilities → 600-1,200 paying
- **Year 4:** 3,000-5,000 facilities → 1,800-3,000 paying
- **Year 5:** 5,000-10,000 facilities → 3,000-6,000 paying

Revenue Targets:

- **Year 3:** \$72K-\$144K MRR (\$864K-\$1.7M ARR)
- **Year 4:** \$216K-\$360K MRR (\$2.6M-\$4.3M ARR)
- **Year 5:** \$360K-\$720K MRR (\$4.3M-\$8.6M ARR)

Team Expansion:

- **Year 3:** 10-15 employees (sales, marketing, engineering, CS)

- **Year 4:** 25-40 employees
- **Year 5:** 50-75 employees

Phase 4 Acquisition Tactics

Scaled Go-to-Market:

- **Inbound Marketing:** SEO dominance (rank #1 for “senior living [city]” in top 50 cities)
- **Paid Acquisition:** \$50K-\$100K/month in Google/Facebook ads
- **Sales Team:** 10-20 reps covering regions
- **National Partnerships:** Partner with national operators (Brookdale, Sunrise, Atria)
- **Channel Partnerships:** Work with national referral organizations, AARP, etc.

National Brand Campaign:

- TV/radio advertising (national or regional)
- Sponsor national conferences (Argentum, LeadingAge, NIC)
- PR in national media (Wall Street Journal, Forbes, CNBC)

Phase 4 Budget

Year 3-5 Budget: \$2M-\$10M/year

Funding Strategy:

- **Year 3:** Series A (\$2M-\$5M)
- **Year 4:** Series B (\$10M-\$20M) if hyper-growth
- **Year 5:** Series C or profitability

Allocation:

- **Sales & Marketing:** 50-60% of budget
- **Engineering & Product:** 20-25%
- **Operations & CS:** 15-20%
- **Admin & Overhead:** 5-10%

Phase 4 Success Criteria

Year 3 Targets:

- \$864K-\$1.7M ARR
- 600-1,200 paying facilities
- National brand recognition
- Proven multi-region operations

Year 5 Targets:

- \$4.3M-\$8.6M ARR
- 3,000-6,000 paying facilities
- Path to profitability or acquisition

Geographic Expansion Playbook

Core Principles (Apply to All Phases)

1. Start Small, Prove, Scale

- Don’t over-expand before proving product-market fit
- Cleveland → Ohio → Midwest → National ensures validation at each stage

2. Leverage Local Success Stories

- Every expansion phase uses testimonials from previous phase
- “Trusted by 500+ Midwest facilities” is more credible than “New startup”

3. Be Regional Before Being National

- Dominate one region (Midwest) before spreading thin nationally
- Regional focus = lower CAC, higher conversion, better service

4. Focus on Relationships Early, Scale with Technology Later

- Phase 1-2: High-touch, in-person, relationship-building
- Phase 3-4: Automate, self-service, inbound marketing

5. Association Partnerships are Force Multipliers

- OALA in Ohio gave access to 600+ facilities
- Replicate in every state (state-level associations)

6. Content is King for Local SEO

- Create city-specific content for every major market
- “Best Senior Living in [City]” drives organic traffic

Expansion Decision Framework

When to Expand to Next Phase:

Metric	Phase 1→2	Phase 2→3	Phase 3→4
Paying Customers	6-10	60-80	120-240
MRR	\$720-\$1,200	\$7,200-\$9,600	\$14,400-\$28,800
Market Penetration	4-7% Cleveland	5-7% Ohio	2-4% Midwest
Testimonials	3-5	10+	20+
Team	1-2 founders	+1-2 hires	+5-10 hires
Funding	Bootstrapped	\$0 or \$250K seed	\$2M-\$5M Series A

Red Flags to Pause Expansion:

- Low conversion rate (<40% free-to-paid)
- High churn (>10% monthly)
- Poor unit economics (CAC > LTV)
- Negative customer feedback
- Founder burnout

Competitive Positioning by Phase

Phase 1 (Cleveland): “Built by Clevelanders, for Cleveland”

- **Message:** “We’re local. We get it. We’re here to help.”
- **Positioning:** The modern, local alternative to national referral services

- **Competitors:** A Place for Mom (national), Senior Care Authority (traditional)

Phase 2 (Ohio): “Ohio’s Leading Senior Living Marketplace”

- **Message:** “Trusted by Cleveland facilities, now serving all of Ohio.”
- **Positioning:** The statewide leader in senior living technology
- **Competitors:** A Place for Mom, local directories

Phase 3 (Midwest): “The Midwest’s Senior Living Marketplace”

- **Message:** “Connecting families and facilities across the Midwest.”
- **Positioning:** The regional powerhouse, Midwest-focused
- **Competitors:** A Place for Mom, Caring.com, regional players

Phase 4 (National): “America’s Senior Living Marketplace”

- **Message:** “Find senior care anywhere in America—all in one place.”
 - **Positioning:** National leader, challenger to A Place for Mom
 - **Competitors:** A Place for Mom, Caring.com, Seniorly, national operators’ platforms
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Risk Mitigation by Phase

Phase 1 Risks

- **Risk:** Cleveland market too small to validate model
- **Mitigation:** 150 facilities is sufficient for MVP, fast pivot to Ohio if needed
- **Risk:** Slow operator adoption
- **Mitigation:** In-person outreach, free tier, OALA credibility

Phase 2 Risks

- **Risk:** Virtual outreach doesn’t convert as well as in-person
- **Mitigation:** Use Cleveland testimonials, offer virtual demos, selective in-person trips
- **Risk:** Spreading too thin across Ohio
- **Mitigation:** Focus on Columbus + Cincinnati first, then Toledo/Akron/Dayton

Phase 3 Risks

- **Risk:** Midwest markets differ from Ohio
- **Mitigation:** Research state associations, adapt messaging, test 1-2 states first
- **Risk:** Team bandwidth (still small)
- **Mitigation:** Hire sales reps in Year 2, automate where possible

Phase 4 Risks

- **Risk:** National competitors fight back (price cuts, feature copying)
- **Mitigation:** Strong Midwest moat, superior product, customer loyalty
- **Risk:** Losing regional focus

- **Mitigation:** Maintain local content, local partnerships, regional sales teams
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Key Performance Indicators (KPIs) by Phase

Phase 1: Cleveland (Month 1-6)

- Facilities signed up: 15
- Paying conversions: 6-10
- MRR: \$720-\$1,200
- Family users: 50-100
- Market penetration: 4-7%

Phase 2: Ohio (Month 7-12)

- Total Ohio facilities: 100
- Paying conversions: 60-80
- MRR: \$7,200-\$9,600
- Family users: 200-400
- Market penetration (Ohio): 5-7%
- Market penetration (Cleveland): 20-30%

Phase 3: Midwest (Year 2)

- Total Midwest facilities: 200-400
- Paying conversions: 120-240
- MRR: \$14,400-\$28,800
- Market penetration (Midwest): 2-4% per state

Phase 4: National (Year 3+)

- Total U.S. facilities: 1,000-10,000
 - Paying conversions: 600-6,000
 - MRR: \$72K-\$720K
 - ARR: \$864K-\$8.6M
 - Market penetration (National): 1-10%
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Conclusion

CareLink AI's phased geographic expansion strategy—**Cleveland → Ohio → Midwest → National**—provides a systematic, low-risk path to building a national senior living marketplace.

Why This Strategy Works:

1. **Validates product-market fit** in contained market (Cleveland)
2. **Proves scalability** within one state (Ohio)
3. **Demonstrates regional dominance** before going national (Midwest)
4. **Builds credibility** with each phase (testimonials, case studies)
5. **Reduces risk** by avoiding premature national expansion
6. **Optimizes CAC** through regional focus and local relationships
7. **Positions for acquisition** (regional leader = attractive target) or national scale

Next Steps:

1. **Execute Phase 1** (Month 1-6): Cleveland beta launch
 2. **Validate metrics** at Month 6 decision point
 3. **Expand to Phase 2** (Month 7-12): Ohio statewide
 4. **Raise funding** if needed at Month 12 for Phase 3 acceleration
 5. **Scale systematically** through Midwest and eventually national markets
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Next Review: Monthly during Phase 1 execution