Our Vision

Vision

To revolutionize how people shop and pay for healthcare services.
CoPatient redefines how patients engage with healthcare, enabling them to be consumers of healthcare, and ensuring that they have access to fair prices and flexible marketplaces, while providing incentives to encourage active participation.

Mission

To establish an effective and efficient patient centric payment platform.
CoPatient strives to provide tools and capabilities that empower patients to become consumers of healthcare, while safely and securely helping them understand and complete their healthcare payments, and providing rewards for active engagement.

Values - FETT

Fairness – Be fair to all stakeholders.
Efficient – Reduce the cost of healthcare.
Transparency – Promote clarity in all we do.
Trust – Be the North Star for trust.

Chronic Clara

Background / Demographics

Job? Career Path? Family? Lifestyle? Age? Income?

- Married Female
- Age 50-75
- Employed Long Term or Retired
- Mid Level HH Income $50-75k
- Empty Nester
- Has a chronic illness

Common Objections

Why wouldn't they purchase our product?

- I already have a process
- I don't have the time for something else
- Can I trust CoPatient with my personal data?

Identifiers

Communication preferences? Social media platforms?

- 1. YouTube, 2. Facebook, 3. Pintrest, 4. Print, 5. OOH
- Likes combo of digital, print, & OOH
- In Market for Healthcare items, info, chronic disease research

Goals / Challenges

What does this person struggle with in relation to meeting goals? What serves as a roadblock for this person's success?

- Understanding bills/coverage
- Saving time, since she is so busy with work, home, and care
- Saving $, chronic care is expensive

What can we do?

...to help our persona achieve their goals? ...to help our persona overcome their challenges?

- Provide Peace of Mind
- Save Time and Money
- Consolidate Everything in 1 place
- Provide loyalty credits

Marketing Message

How can you describe your solution to have the biggest impact on your persona?

- All your Healthcare Expenses in 1 Place!
- Save Time, Save Money, Stay Sane! Let CoPatient Consolidate and Negotiate all your Medical Bills
- CoPatient, a fresh way to manage healthcare expenses
- Healthcare bills from everywhere? Not with CoPatient! Save time and money by letting CoPatient consolidate and negotiate all your medical bill.

Chronic Chase

Background / Demographics

Job? Career Path? Family? Lifestyle? Age? Income?

- Married or Single Male
- Age 50-75
- Has a chronic illness
- Employed Long Term or Retired
- Mid Level HH Income $50-75k
- Empty Nester

Common Objections

Why wouldn't they purchase our product?

- I know what I'm doing here
- I don't have the time for something new
- I've been doing this a while and think I'm not missing anything

Identifiers

Communication preferences? Social media platforms?

- 1. YouTube, 2. Facebook, 3. Pintrest, 4. Print, 5. OOH
- Likes combo of digital, print, & OOH
- In Market for Healthcare items, info, chronic disease research

Goals / Challenges

What does this person struggle with in relation to meeting goals? What serves as a roadblock for this person's success?

- Complicated existing process
- Finding the time to make sure everything is right
- Saving $, chronic care is expensive

What can we do?

...to help our persona achieve their goals? ...to help our persona overcome their challenges?

- Simplify his process
- Consolidate Everything in 1 place
- Save Time and Money
- Provide Peace of Mind

Marketing Message

How can you describe your solution to have the biggest impact on your persona?

- It pays to pay for healthcare with CoPatient!
- CoPatient consolidates and ensures your medical bills are accurate to your coverage, provides financing options, and even lets you earn loyalty credits!.
- Earn Healthcare Credits by letting CoPatient consolidate and negotiate all of your medical bills!
- Make Healthcare smarter, save more with CoPatient!

Family Decider Dana

Background / Demographics

Job? Career Path? Family? Lifestyle? Age? Income?

- Married or Single Female
- Age 25-45
- Employed Long Term or Stay at Home
- Lower/Mid Level HH Income $30-60k
- 1-3 Children
- Active, Busy, Healthy

Common Objections

Why wouldn't they purchase our product?

- I don't have the time for something else, even if it'll help
- I don't think we need this service right now.
- I don't want to complicate it more.

Identifiers

Communication preferences? Social media platforms?

- 1. YouTube, 2. Facebook, 3. Instagram, 4. Pintrest, 5. OOH
- Likes combo of digital, print, & OOH
- In Market for family info, child care, primary care, pregnancy, etc.

Goals / Challenges

What does this person struggle with in relation to meeting goals? What serves as a roadblock for this person's success?

- Saving time, since she is so busy with work, home, and care.
- Managing a budget with potential unknowns in healthcare expenses.
- Saving $, families are expensive.

What can we do?

...to help our persona achieve their goals? ...to help our persona overcome their challenges?

- Provide credits for participation
- Consolidate, Advocate, & Provide Peace of Mind that everything is accurate
- Make CoPatient a 1 stop shop for medical payment needs. Financing?

Marketing Message

How can you describe your solution to have the biggest impact on your persona?

- CoPatient, all your Healthcare Expenses aggregated and reviewed for accuracy with your coverage!!
- Save Time, Save Money, Stay Sane! Let CoPatient Consolidate and Negotiate all your Medical Bills
- CoPatient, a fresh way to manage healthcare expenses!
- Earn Healthcare Credits and Enjoy Discounted prices when you work with CoPatient for your Healthcare Bills!

Retiring Rachel

Background / Demographics
Job? Career Path? Family? Lifestyle? Age? Income?

- Married Female
- Age 55-64
- Family is Retiring Soon
- Mid Level HH Income $50-75k
- Active, Traveler, DIYer, Healthy

Common Objections
Why wouldn't they purchase our product?

- I have more time now, so I could handle this myself.
- We are well covered on medical already and I don't want to worry about this.
- AARP/Medicare will cover this.

Identifiers
Communication preferences? Social media platforms?

- 1. Facebook, 2. YouTube, 3. Non-Digital
- Likes combo of digital, print, & OOH
- In Market for Medicare, retirement, travel, home improvement, DIY

Goals / Challenges
What does this person struggle with in relation to meeting goals? What serves as a roadblock for this person's success?

- Unknown future with different coverage coming out of employment.
- Manage a fixed income budget.
- Potential worsening health resulting in higher use of the healthcare system.

What can we do?
...to help our persona achieve their goals? ...to help our persona overcome their challenges?

- Provide Peace of Mind that all bills are checked for compliance with coverage
- Consolidate Everything in 1 place, making sure that bills aren't missed.
- Save Time and Money with credits.

Marketing Message
How can you describe your solution to have the biggest impact on your persona?

- CoPatient consolidates and ensures your bills are accurate to your coverage, provides financing options, and even lets you earn loyalty credits on healthcare payments!
- It pays to pay for healthcare with CoPatient

- Save Time, Save Money, Stay Sane! Let CoPatient Consolidate and Negotiate all your Medical Bills
- Healthcare bills from everywhere? Not with CoPatient! Save time and money by letting CoPatient consolidate and negotiate all your medical bill.

Millenial Mary

Background / Demographics

Job? Career Path? Family? Lifestyle? Age? Income?

- Female
- No Children
- Age 26-40
- Employed Short Term
- Low/Mid Level HH Income $25-60k
- Active, Outdoorsy, Experiences, Healthy

Common Objections

Why wouldn't they purchase our product?

- I don't want anyone else having my medical data.
- I don't really need this right now.
- I can do this myself

Identifiers

Communication preferences? Social media platforms?

- 1. YouTube, 2. Facebook, 3. Instagram, 4. Snapchat 5. OOH
- Likes 360 degree online communication & OOH
- Life Events: Marriage, Kids, New Job, Healthcare Research

Goals / Challenges

What does this person struggle with in relation to meeting goals? What serves as a roadblock for this person's success?

- Caring for themselves and/or spouses
- Make this simple/easy so that it doesn't impact the rest of my life.
- New to the system and don't understand everything.

What can we do?

...to help our persona achieve their goals? ...to help our persona overcome their challenges?

- Give up data for convenience
- Simplify, educate, and consolidate everything into one place.
- Provide the opportunity to earn loyalty credits for future discounts.
- Provide convenience and peace of mind.

Marketing Message

How can you describe your solution to have the biggest impact on your persona?

- All your Healthcare Expenses in 1 Place!
- It pays to pay for healthcare with CoPatient.
- .Earn Credits Today!

- CoPatient, earn credits when you pay for healthcare.
- Earn Healthcare Credits by letting CoPatient consolidate and negotiate all your medical bills

HR Hilary

Background / Demographics

Job? Career Path? Family? Lifestyle? Age? Income?

- Female
- Caucasian
- Age 35-55
- HR Manager/Director/VP
- Salary $90-150k
- Company Size 1-10 & 500+ DTE
- 11-499 Employees for Branding

Common Objections

Why wouldn't they purchase our product?

- My employees might not use/utilize this benefit.
- We're not getting anything tangible for our spend.
- Our employees may feel that our medical insurance isn't up to par.

Identifiers

Communication preferences? Social media platforms?

- 1. LinkedIn, 2. HR Blogs/Sites, 3. Glassdoor, 4. YouTube
- Likes 360 degree online communication with direct mail
- Job Title, Company Size,

Goals / Challenges

What does this person struggle with in relation to meeting goals? What serves as a roadblock for this person's success?

- Don't get fired for bringing this on.
- Offer an attractive and competitive benefits platform that is best in class.
- Looking for innovative models but with practical implementation.

What can we do?

...to help our persona achieve their goals? ...to help our persona overcome their challenges?

- Provide low cost benefit for managing healthcare costs and earning credits.
- Give employees a single, consolidated place for healthcare bills that are already checked for accuracy to coverage.
- Decrease employees out of pocket.

Marketing Message

How can you describe your solution to have the biggest impact on your persona?

- CoPatient, helping your employees manage their healthcare costs.
- Make your healthcare benefits smarter, employees save more with CoPatient.
- A fresh way to manage healthcare finances.
- CoPatient, employees earn credits when they pay for healthcare.
- Offer employees healthcare financing and advocacy with CoPatient!
- CoPatient, consolidating and negotiating all employee medical bills.

Benefit Broker Barry

Background / Demographics

Job? Career Path? Family? Lifestyle? Age? Income?

- Male
- Caucasian
- Age 30-50
- Benefits Consultant / Producer
- Income $125-190k
- Company Size 500+

Common Objections

Why wouldn't they purchase our product?

- Not enough $ in it for me
- Will this compete with a higher performing benefit I sell?
- Price
- Ease of selling

Identifiers

Communication preferences? Social media platforms?

- Webinars – LinkedIn
- Hubspot Email & Ad campaigns
- Sales Cold Calls – Big Rolodex

Goals / Challenges

What does this person struggle with in relation to meeting goals? What serves as a roadblock for this person's success?

- Giving clients a broad range of high quality benefit options
- Cross selling different benefits with different packages
- Small team or limited resources to get the message out

What can we do?

...to help our persona achieve their goals? ...to help our persona overcome their challenges?

- Balance out their benefit offerings to be more well rounded.
- Offer their clients a new benefit
- Provide incremental revenue stream to their business

Marketing Message

How can you describe your solution to have the biggest impact on your persona?

- CoPatient, helping your client's employees manage healthcare costs.
- Add another income stream, employees save more with CoPatient.
- A fresh way to manage healthcare finances. CoPatient, a new revenue stream
- CoPatient, employees earn credits when they pay for healthcare.
- Offer client employees healthcare financing and advocacy w/ CoPatient!
- CoPatient, consolidates and negotiates all medical bills., offer more today!

Benefit Broker Boss Barry

Background / Demographics

Job? Career Path? Family? Lifestyle? Age? Income?

- Male
- Caucasian
- Age 40-60
- VP+ Partnerships or Corp Dev.
- Income $225+k
- Company Size 500+

Common Objections

Why wouldn't they purchase our product?

- Not enough $ in it for me
- Will this compete with a higher performing benefit I sell?
- Price
- Ease of selling

Identifiers

Communication preferences? Social media platforms?

- Networking & Events
- LinkedIn & YouTube
- Email, Direct Mail, & Phone

Goals / Challenges

What does this person struggle with in relation to meeting goals? What serves as a roadblock for this person's success?

- Giving clients a broad range of high quality benefit options
- Cross selling different benefits with different packages
- Small team or limited resources to get the message out

What can we do?

...to help our persona achieve their goals? ...to help our persona overcome their challenges?

- Provide incremental revenue stream to their business
- Balance out their benefit offerings to be more well rounded.
- Offer their clients a new benefit

Marketing Message

How can you describe your solution to have the biggest impact on your persona?

- CoPatient, helping your client's employees manage healthcare costs.
- Add another income stream, employees save more with CoPatient.
- A fresh way to manage healthcare finances. CoPatient, a new revenue stream
- CoPatient, employees earn credits when they pay for healthcare.
- Offer client employees healthcare financing and advocacy w/ CoPatient!
- CoPatient, consolidates and negotiates all medical bills., offer more today!

Hospital Collections Clara

Background / Demographics

Job? Career Path? Family? Lifestyle? Age? Income?

- Female
- Caucasian
- Age 35-55
- Collections, Billing Office, Accounts Payable, Revenue, Ops VP+
- Salary $150-225k
- Company Size 500+

Common Objections

Why wouldn't they purchase our product?

- We can't mess with our existing process
- Price
- Implementation Challenges

Identifiers

Communication preferences? Social media platforms?

- Sales Cold Calls & Networking
- LinkedIn, YouTube
- Email, direct mail, phone

Goals / Challenges

What does this person struggle with in relation to meeting goals? What serves as a roadblock for this person's success?

- Revenue Cycle Management
- Speed of patient payments
- Large collections team needed in house or outsourced to manage this
- Collections is expensive

What can we do?

...to help our persona achieve their goals? ...to help our persona overcome their challenges?

- Speed up patient payments
- Provide a digital solution to decrease collections costs
- Patient centric payment engagement platform

Marketing Message

How can you describe your solution to have the biggest impact on your persona?

- CoPatient, a patient centric payment engagement platform.
- CoPatient equals faster payments
- CoPatient speeds up Revenue Cycles and streamlines patient payments
- CoPatient, all a patient's bills in one place. Consolidate billing today
- Patient's save time and pay faster with CoPatient's bill consolidation and EOB accuracy checks.

Health Ins Exec Heath

Background / Demographics

Job? Career Path? Family? Lifestyle? Age? Income?

- Male
- Caucasian
- Age 35-55
- VP Product
- Salary $150-225k
- Company Size 1000+

Common Objections

Why wouldn't they purchase our product?

- Price
- Complexity to implement
- Too busy and too little measurable ROI
- Will this get me fired?

Identifiers

Communication preferences? Social media platforms?

- Sales Cold Calls & Networking
- LinkedIn, YouTube
- Email, direct mail

Goals / Challenges

What does this person struggle with in relation to meeting goals? What serves as a roadblock for this person's success?

- Membership/Employer/Customer happiness and growth
- Making members feel taken care of
- Ensuring members take advantage of the programs available to them

What can we do?

...to help our persona achieve their goals? ...to help our persona overcome their challenges?

- Provide members with a program to ensure bill accuracy to coverage
- Get members more financially engaged in their healthcare and promote faster pay
- Patient financial engagement platform that is patient centric.

Marketing Message

How can you describe your solution to have the biggest impact on your persona?

- CoPatient, helping your members manage their healthcare costs.
- Make your membership smarter, members save more with CoPatient.
- A fresh way for members to manage healthcare finances.

- CoPatient, members earn credits when they pay for healthcare.
- Offer members healthcare financing with CoPatient!
- CoPatient, consolidating and expediting payment on medical bills.