

[Company Logo]

November 2024

BUSINESS PLAN

 [NAME]

 [EMAIL ADDRESS]

 [PHONE NUMBER]

 [WEBSITE]

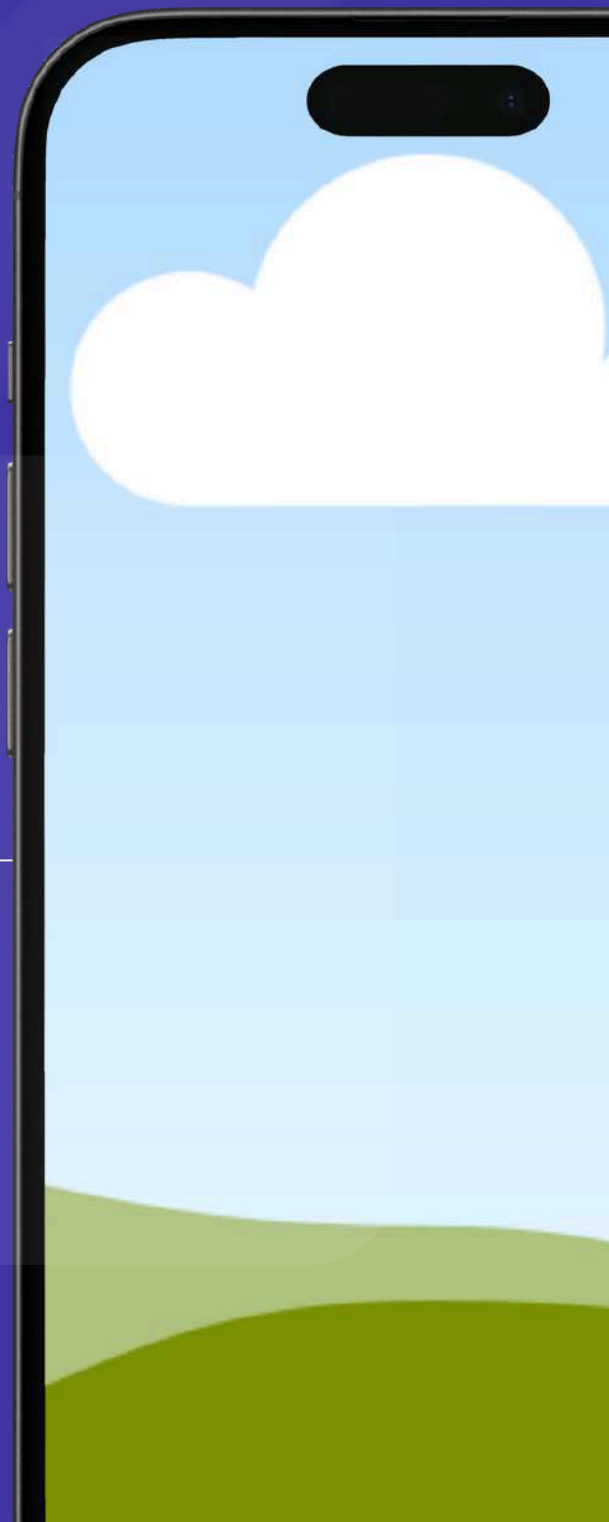


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1.0 EXECUTIVE SUMMARY

Company Overview

[Company] is a user-centered health data platform designed to empower individuals to take control of their health information. We address the challenges of fragmented healthcare data by providing a single, secure, and accessible platform for individuals to manage, track, and share their health data.

Mission

To empower people to use their personal health data to improve their health and enhance their lives.

The Problem

Currently, there's no single platform that allows individuals to easily view, store, and securely share their health information. This leads to several challenges: health data isn't easily actionable for individuals, it's not user-centered, and it's often siloed with limited interoperability, making it difficult to access and share across different healthcare providers and systems.

Our Solution

[Company] offers a comprehensive solution by providing a platform where health data from various sources – including user input, wearables, electronic health records (EHRs), and the environment – is organized and readily accessible on demand. This data is continuously updated, securely stored with advanced security measures, and analyzed to generate personalized health recommendations through predictive analytics.

Unique Value Proposition

We differentiate ourselves through:

- **User-Centric Design:** Prioritizing individual needs and ease of use.
- **Comprehensive Data Integration:** Aggregating data from diverse sources for a holistic view.
- **Actionable Insights:** Providing personalized recommendations and empowering proactive health management.
- **Secure Data Sharing:** Enabling secure and controlled sharing of information with providers and loved ones.

Business Model

[Company] operates on a freemium model, offering core functionality for free while providing premium features through a paid subscription. Additional revenue streams include targeted advertising within the app (with strict privacy safeguards) and partnerships with organizations/institutions for analytical insights and clinical research.

Target Market

Our primary target market includes health-minded individuals looking to proactively manage their health data, patients with chronic conditions or complex health issues, and caregivers or family members who support these individuals.

Market Opportunity

Global mHealth Apps Market: USD 154.12 billion by 2034 (CAGR = 15.2%)
U.S. mHealth Apps Market: USD 51.83 billion by 2034 (CAGR = 15.3%)

Funding Request

\$500,000

2.0 WHY [COMPANY]

THE PROBLEM


In a world overflowing with data, our most valuable personal information – our personal health data – remains fragmented, frustratingly difficult to access, and ultimately underutilized. Whether managing a chronic condition or simply striving for better well-being, we are all trying to navigating a healthcare system where our own data often works against us. There is currently no easy way to see or track a full picture of our health story in one place. This is a major problem.


- 1 Lack of a Unified Platform:** Patients are stuck jumping between patient portals, sifting through paper files, and trying to recall information from various appointments. There's simply no single, convenient platform for viewing, storing, and sharing all health data.
- 2 Data Isn't Actionable:** Even when there is access to health data, it's often presented in a way that's hard to understand or use. There is a lack of personalized insights to inform progress in achieving individual health goals. Raw numbers and medical jargon don't translate into meaningful actions that can help to improve well-being.
- 3 Individual Empowerment is Missing:** Most health data platforms are built to serve the needs of clinicians, hospitals or insurance companies, not the individual. This means usability and individual experience often come as an afterthought, if at all. It should be easy for people to access and manage their own health information, but the current system makes it unnecessarily complicated.
- 4 Siloed Data with Limited Interoperability:** Health data is notoriously locked away in proprietary systems and behind firewalls. Sharing data between providers or even getting it onto personal devices is a constant struggle. This impacts everyone, from those with complex medical histories to those simply tracking their fitness progress. As a result, this lack of portability hinders the ability to have a complete and accurate view of health histories and prevents seamless care coordination.


OUR SOLUTION


[Company] is the platform that puts individuals first and gives them the tools they need to truly own their health data. Here's how:

- Centralized Data Aggregation:** We're bringing together comprehensive health data from all sources – user input, wearables, electronic health records (EHRs), and even environmental factors – and organizing it into one accessible, on-demand platform to give individuals a complete and up-to-date view of their health status, all in one place. No more hunting for information or dealing with fragmented records.

 **Actionable Insights:** Data alone isn't enough. Using predictive analytics, we deliver personalized health recommendations tailored to each individual. Our sophisticated algorithms analyze user data to identify meaningful patterns and generate actionable insights. These insights are then translated into clear, concise recommendations, empowering individuals to make informed, proactive decisions that enhance their health and well-being.


 **Cumulative Health Record:** Health data is dynamic and constantly changing. We update this data continuously, building a comprehensive, longitudinal view of an individual's health journey. This allows individuals and their healthcare providers to track progress, identify trends, and make more informed decisions. Plus, because this accumulating data remains securely in the user's hands, it's available whenever they need it.


 **Enhanced Real-Time Communication:** Readily accessible and comprehensive medical history streamlines real-time communication between individuals and healthcare providers, and fosters more insightful and efficient interactions.


 **Secure Data Sharing:** Our platform is built on advanced data security technology, and we conduct regular audits to minimize security risks. This approach enables secure sharing of health information with healthcare providers, family members, and caregivers, according to the user's preferences.


WHAT SETS US APART

We're building [Company] to be fundamentally different from anything else on the market. Here's what makes us stand out:

 **100% User-Focused:** Every design, every feature, and every update is made with the user in mind. We are dedicated to creating a platform that is intuitive, easy to use, and genuinely empowers individuals to take control of their health.

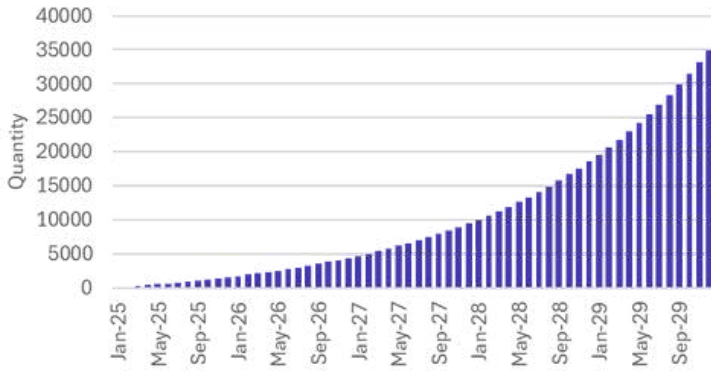
 **First to Market with a Comprehensive Solution:** We are the first to offer a truly individual-centered, shareable, analytical health dashboard. We're not just storing data; we're making it useful and accessible in a way that hasn't been done before.

 **Personalized User & Provider Profiles:** Individualized user and provider profiles allow for a personalized experience and facilitate more efficient communication and collaboration between patients and their healthcare team.

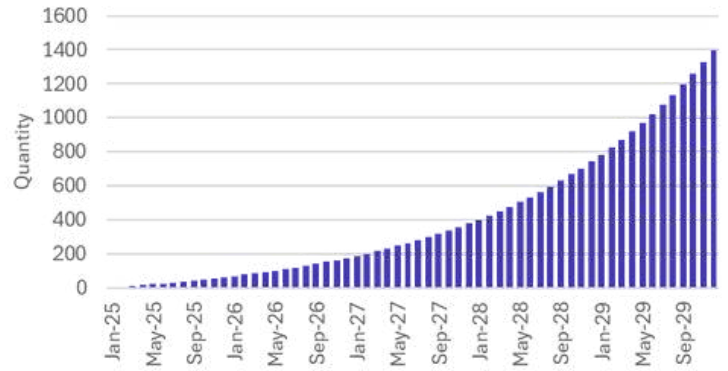
 **Provider Incentives:** We understand that for our platform to be truly effective, it must also benefit providers. [Company] saves providers time, staff effort, and allows for real-time communication with users.

3.0 KEY FINANCIAL METRICS

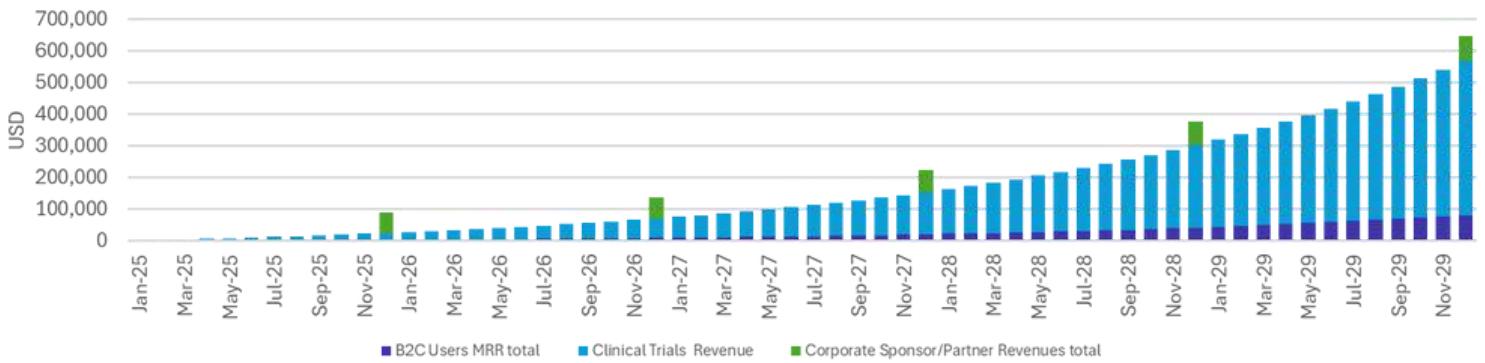
Active B2C



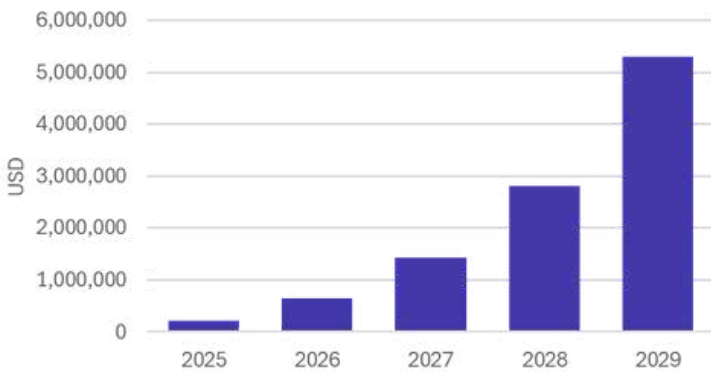
Trials



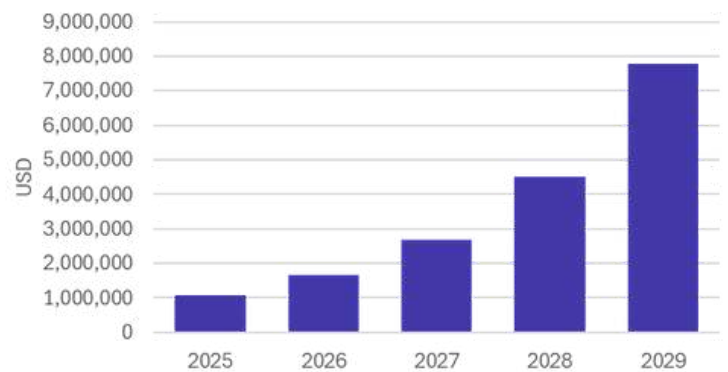
Revenues



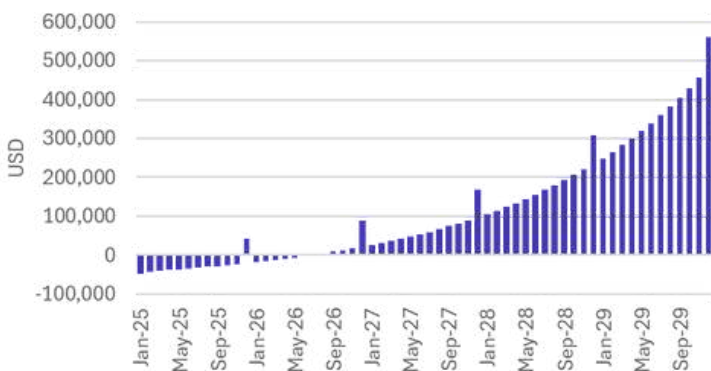
Revenue Forecast (sum)



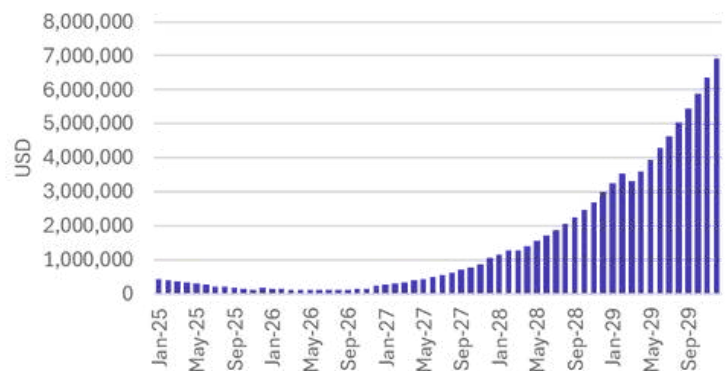
End of Year ARR (eoy)



Net Profit



Cash Balance



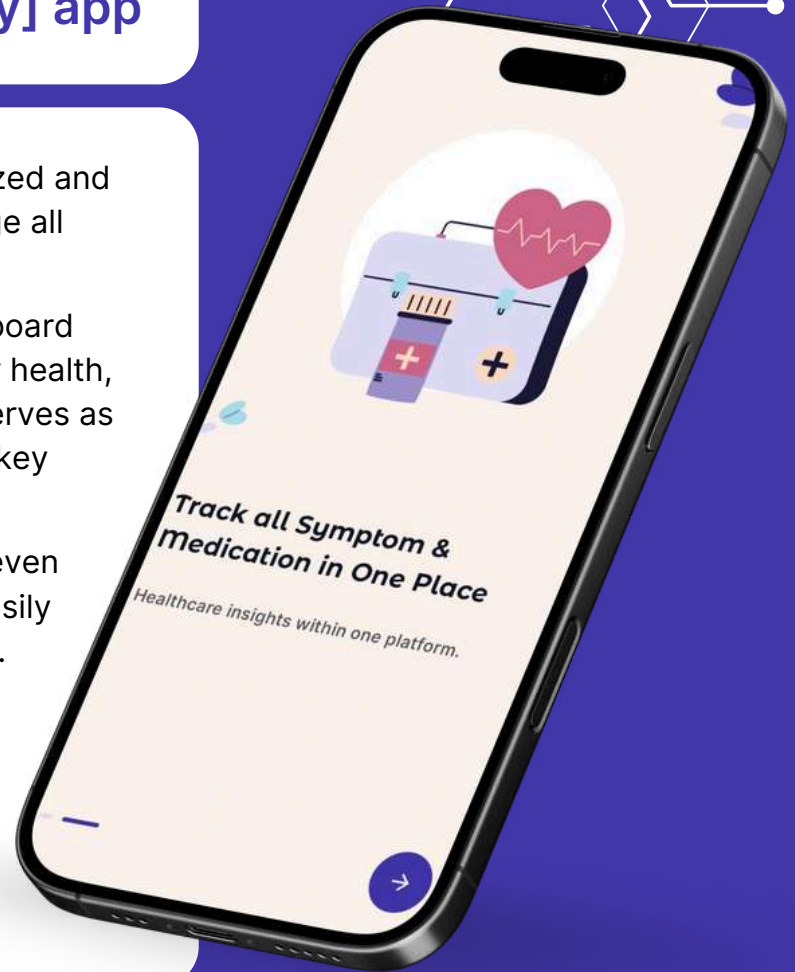
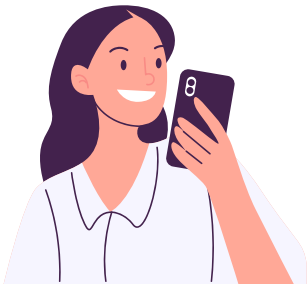
4.0 OUR PRODUCT

Introducing the [Company] app

The [Company] app provides a centralized and secure location for individuals to manage all their health data.

Imagine a single, easily navigable dashboard that displays a complete picture of your health, updated in real-time. This dashboard serves as the central hub, providing access to all key features and information.

Our clear, intuitive layout ensures that even those unfamiliar with technology can easily navigate the app and utilize its features.



Key Features



Universal Data Integration

[Company] seamlessly integrates data from a wide range of sources:

- **Manual User Input:** Users can manually log health metrics, symptoms, medications, and other relevant information.
- **Wearable Device Connectivity:** Direct integration with popular wearables allows for automatic syncing of activity levels, sleep patterns, heart rate, and other biometric data.



Interactive Timeline

A visual timeline presents a chronological view of all health data, making it easy to identify trends and patterns over time. This timeline allows users to quickly pinpoint specific events, appointments, or changes in their health status.



Smart Search & Filtering

Robust search and filtering capabilities allow users to quickly locate specific information within their health records. They can filter by data type, date range, or keyword.



Personalized Health Recommendations

Advanced algorithms analyze user data to provide tailored recommendations related to lifestyle changes, preventive screenings, and potential health risks.



Secure Data Sharing

Users can selectively grant access to their health data with healthcare providers, family members, or caregivers. Granular control over data sharing ensures that users maintain ownership and privacy. Different levels of access can be granted.



Appointment Scheduling & Real-Time Chat

Streamlined appointment scheduling with automated reminders to reduce missed appointments. Integrates with provider systems for seamless booking and includes real-time chat with providers for instant communication.



Clinical Trial Matching

Based on user profiles and health data, identifies relevant clinical trial opportunities and facilitates participation. This feature helps connect users with potentially life-changing research and treatments.

How It Works



1

Download and Install

Users download the [Company] app from the Apple App Store or Google Play Store and install it on their phones.

2

Profile Creation

A brief 3-minute profile is completed, followed by identity verification. This process ensures data security and appropriate access.

3

Baseline Assessment

An 8-10 minute baseline assessment gathers relevant information such as age, gender, and baseline health status. This information is used to generate a complete profile and provide initial, age- and gender-specific health recommendations.

4

Optional Detailed Assessments

Users have the option to complete additional assessments for a more detailed profile. A more comprehensive profile allows for more relevant recommendations. These additional assessments are optional and can be completed at any time

5

Stay Informed & Take Action

Start receiving personalized health recommendations and targeted notifications based on the profile and data. Reminders include upcoming appointments, medications, annual screenings, and potential research opportunities.

5.0 BUSINESS MODEL

[Company] operates on a freemium model with multiple revenue streams designed to ensure sustainability while providing valuable services to individuals, healthcare providers, and research institutions.

REVENUE STREAMS

01

Premium Subscription: The premium subscription (*\$15 per Month or \$150 Annually*) unlocks advanced features, such as comprehensive risk scores based on predictive analytics, personalized health recommendations, appointment scheduling integration, and priority access to clinical trial matching. Annual subscription fees provide a recurring revenue stream.

02

Sponsorships: [Company] will generate revenue through paid sponsorships (*\$8,000 per Partner Annually*) with organizations invested in Health & Wellness, such as insurance companies and retailers. Sponsors will underwrite specific programs and initiatives within the app, gaining access to our user base and co-branding opportunities to promote healthy habits & outcomes.

03

Targeted Health Ad Revenue: [Company]'s free tier will generate revenue through targeted advertising opportunities. These ads will be carefully curated to ensure relevance and user privacy. We will partner with businesses offering health-related services, such as screening clinics targeting individuals due for mammograms or gyms targeting users with a high BMI.

04

Predictive Analytics for Research: Leveraging anonymized, aggregated user data, we provide valuable insights to pharmaceutical and clinical research companies. This includes identifying potential candidates for clinical trials (*\$350 per Trial*), facilitating patient recruitment and consent, and contributing to the development of new treatments and therapies.

KEY RESOURCES

Proprietary Technology Platform:

The [Company] app, including our underlying infrastructure, data storage capabilities, and security protocols, forms the foundation of our business.

Data: Aggregated and anonymized user data provides valuable insights for predictive analytics and research partnerships.

Human Capital: A skilled team of software developers, data scientists, healthcare professionals, and marketing experts is essential for ongoing development, maintenance, and growth.

Strategic Partnerships: Collaborations with healthcare providers, research institutions, and health and wellness companies expand our reach and enhance service offerings.

KEY ACTIVITIES

Product Development & Maintenance: Continuous improvement and updates to the [Company] app to ensure optimal functionality, user experience, and security.

Data Analysis & Insights Generation: Using data analytics to generate personalized health recommendations and provide valuable insights to research partners.

Marketing & User Acquisition: Implementing targeted marketing campaigns to attract new users and promote premium subscription services.

Customer Support & Engagement: Providing excellent customer service and building a strong user community to enhance retention and satisfaction.



Compliance & Security: Maintaining strict adherence to data privacy regulations and implementing robust security measures to protect user information.

COST STRUCTURE

Technology Infrastructure: Costs associated with servers, data storage, and software licensing.

Personnel Costs: Salaries, benefits, and training expenses for employees.

Marketing & Sales Expenses: Costs related to advertising, public relations, and sales efforts.

Research & Development: Investment in ongoing innovation and the development of new features.

Administrative & Operational Costs: General overhead expenses, including office space, utilities, and legal services.

6.0 MARKETING PLAN

[Company]'s marketing strategy focuses on reaching our target audience through a multi-channel approach. Our marketing efforts concentrate on app downloads, user engagement, and retention.

DIGITAL MARKETING CAMPAIGNS

Search Engine Optimization

Optimize our website and content to rank highly in search engine results for relevant keywords related to health data management, personal health records, and related terms.

Paid Search Advertising

Utilize pay-per-click (PPC) advertising on search engines to target users actively searching for solutions like ours.

Social Media Marketing

Engage with potential users on social media platforms, sharing valuable content, health tips, and product updates. Run targeted social media ads to reach specific demographics.

Mobile App Advertising

Promote [Company] through advertisements within other relevant mobile apps, focusing on health, fitness, and wellness categories.

CONTENT MARKETING

Blog Posts

Regular blog posts covering topics such as managing personal health data, understanding health metrics, and tips for improving overall wellness.

Case Studies

Develop and publish case studies showcasing how [Company] has helped individuals manage their health more effectively.

Infographics and Videos

Create visually engaging content formats to explain complex health data concepts and highlight [Company]'s features.

EMAIL MARKETING

Welcome Campaigns

Automated email sequences to onboard new users and educate them about the app's features.

Newsletter

Regular newsletters featuring new product updates, health tips, and patient success stories.

Promotional Emails

Targeted emails highlighting the benefits of the premium subscription and special offers.

STRATEGIC PARTNERSHIPS

Insurance Companies & Academic Institutions

Partner with insurance companies and academic institutions on a subscription basis to track key health indicators e.g. vaccination rates for students or employees, or with insurance companies to track and incentivize adherence to healthy behavior e.g. weight loss.

Health and Wellness Brands

Co-promote [Company] alongside complementary products and services.

Corporate Wellness Programs

Offer [Company] as a benefit to employees through corporate wellness partnerships.

BUDGET



Our marketing budget is \$40,000 annually. This budget is reviewed and adjusted quarterly based on performance and market conditions.

KEY METRICS

App Downloads: Total number of app downloads across iOS and Android platforms.

User Registration: Number of users who create an account within the app.

Active Users: Daily/Monthly active users to measure engagement.

Conversion Rates: Percentage of users who convert from the free version to a premium subscription.

Website Traffic: Number of visits to the [Company] website, including organic and paid traffic sources.

Social Media Engagement: Likes, shares, comments, and follower growth on social media platforms.

Email Open and Click-Through Rates: Performance of email marketing campaigns.

Customer Acquisition Cost (CAC): The cost of acquiring a new user.

Customer Lifetime Value (CLTV): The predicted revenue a user will generate throughout their relationship with [Company].

Return on Marketing Investment (ROMI): Overall effectiveness of marketing spend in driving revenue.

7.0 MARKET OPPORTUNITY

7.1 TARGET CUSTOMERS

[Company] aims to connect with individuals who recognize the value of managing their health information proactively. Our primary target market includes three key groups:



Health-Conscious Individuals

These are people who prioritize their well-being and actively look for ways to improve their health. They are likely to track their fitness, nutrition, and other health metrics, and they appreciate technology that helps them understand and manage their health data. They may be using various health and wellness apps and are looking for a centralized platform to bring all their information together.



Patients with Chronic Conditions or Complex Health Challenges

Individuals managing ongoing health conditions often go through complex treatment plans, multiple providers, and a constant flow of medical information. We offer them an essential tool for organizing their health records, tracking symptoms, and communicating effectively with their healthcare team. Our platform empowers these individuals to play a more active role in their care.



Caregivers and Family Members

Supporting a loved one with health challenges often involves coordinating appointments, managing medications, and ensuring continuity of care across different providers. [Company] provides caregivers with a secure and efficient way to access and share vital health information, streamlining communication and facilitating better care coordination.

While these three segments represent our core target market, our comprehensive features make it appealing to a broader audience. We believe anyone who wants to take control of their health data will find value in our platform.

Our secondary target market includes:

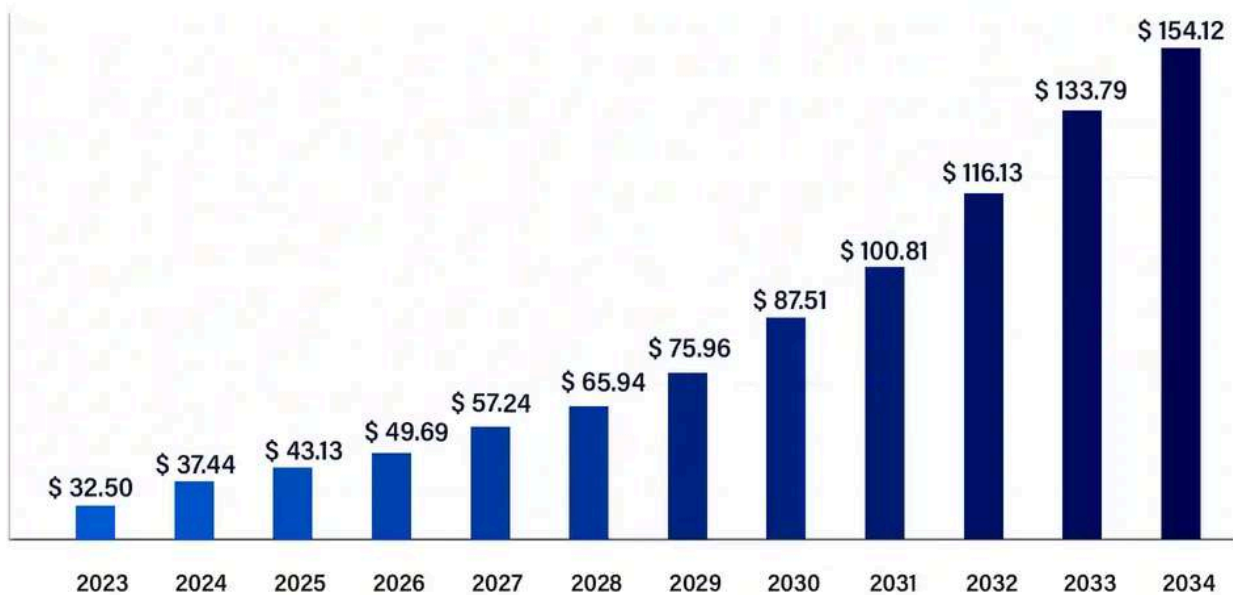
#4 Healthcare Providers

These are physicians, nurses, and other healthcare professionals who seek tools to improve patient care, streamline workflows, and enhance communication. They recognize the value of comprehensive patient data but often lack efficient systems for accessing and managing that information. [Company] offers them a centralized platform to access patient histories, track progress, and communicate effectively with patients and other members of the care team. They are interested in solutions that save time, reduce administrative burden, and empower them to deliver more personalized and effective care.

7.2 MARKET ANALYSIS

MHEALTH APPS MARKET

The global mHealth apps market size accounted for USD 37.44 billion in 2024 and is expected to reach around USD 154.12 billion by 2034, expanding at a CAGR of 15.2% from 2024 to 2034.



GROWTH FACTORS

The increasing number of smartphone users across the globe is expected to boost the demand for mHealth applications. According to a survey, about 1.39 billion smartphones were sold worldwide in 2022 and about 1.34 billion units were sold in 2023. About **3 in 10 adults** reported using at least one health app on their smartphone.

The significant increase in health awareness among the global population is also projected to boost the market.

The rising prevalence of chronic condition is anticipated to boost the market. As per the National Library of Medicine, nearly **1 in 3 adults** worldwide suffer from multiple chronic conditions. Some chronic conditions require continuous monitoring, encouraging people to use health monitoring apps.

The increasing adoption of wearable devices contributes to the growth of the mHealth apps market. Traditional healthcare services have been replaced with patient-centric modules. Brands like Fitbit, Apple, and Sony are offering cost-effective and user-friendly wearable devices that people are starting to use more and more. Moreover, physicians are also encouraging patients to use wearable devices for remote patient monitoring. The rising approvals for wearables and support from international healthcare institutes, such as WHO, further propel the market. In complementary to this, increasing technological advancements and the introduction of highly updated healthcare modules boost the demand for mHealth apps.

RESTRAINING FACTORS

Increasing data security and privacy concerns among users are likely to hamper the market. These apps store a large amount of patient data, including medical history, requiring advanced security features to secure this data. Unauthorized access to this data may lead to fraud and cybercrimes. Furthermore, interoperability issues and lack of standardization deter individuals from adopting mHealth apps.

[Company] is the solution to these!

TYPE INSIGHTS

The medical apps segment held the largest share of the mHealth apps market in 2023 owing to the rising usage of medical apps among patients and healthcare professionals.

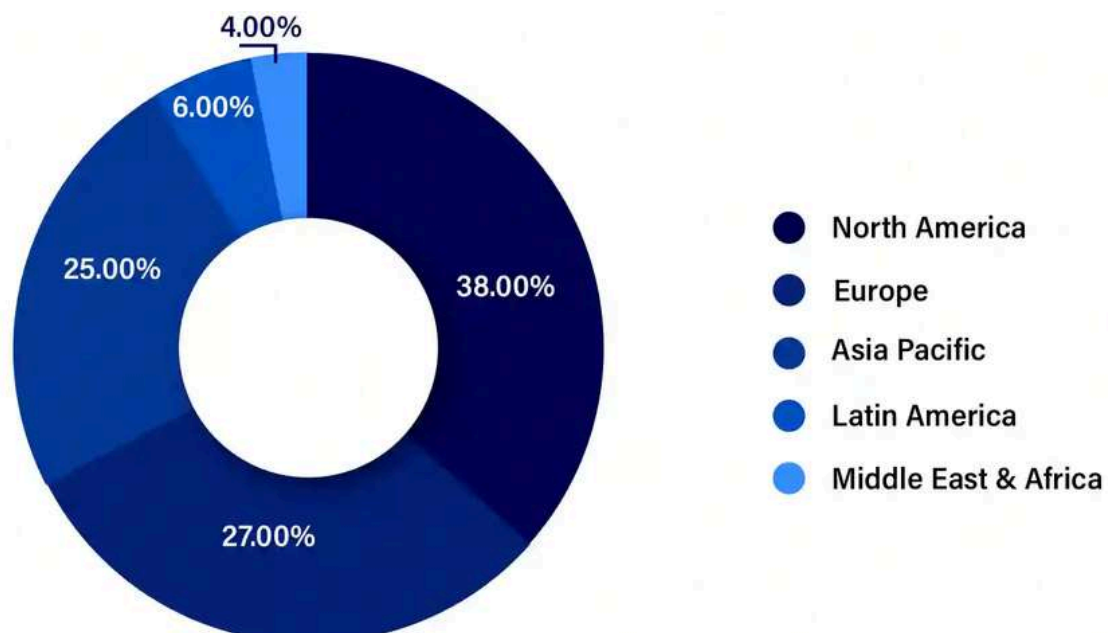
The fitness apps segment is expected to expand at the fastest CAGR in the coming years owing to the increasing awareness about health and wellbeing and concerns about obesity among people. The rise in unhealthier habits and busy lifestyles has encouraged people to use fitness apps. Furthermore, the rising usage of wearable devices drives the segment. As the adoption of wearable devices increases, so does the demand for fitness apps.

PLATFORM INSIGHTS

The android segment dominated the market in 2023 and is projected to continue its dominance during the forecast period. The growth of the segment is driven by the rising adoption of smartphones worldwide. In addition to this, the rising number of mHealth apps for Android is expected to boost the segment.

REGIONAL INSIGHTS

North America dominated the global market in 2023 due to its well-established healthcare infrastructure. The market size reached USD 12.35 billion in 2023.



The availability of advanced healthcare technologies, digital healthcare solutions, and healthcare reimbursement plans covering digital health solutions contributed to the market growth.


The U.S. mHealth apps market size was estimated at USD 10.87 billion in 2023 and is predicted to be worth around USD 51.83 billion by 2034, at a CAGR of 15.3% from 2024 to 2034.



The market in Asia Pacific is anticipated to expand at a significant growth rate during the forecasted period. The proliferation of the internet and the adoption of smartphones have increased drastically in the region, which is boosting the demand for healthcare apps. In addition to this, many Asian countries are adopting advanced digital healthcare solutions to manage healthcare delivery and provide a customer-centric healthcare approach. Furthermore, rising government initiatives to expand healthcare services in the region are likely to contribute to market growth.

8.0 COMPETITION

While other platforms offer pieces of the puzzle, [Company] provides a complete, integrated solution for managing a patient's health information:

COMPETITOR	KEY FEATURES	KEY GAPS	[COMPANY] ADVANTAGE
 <p>Apple Health</p>	<ul style="list-style-type: none"> • Seamless integration within the Apple ecosystem • Integrates with wearables • Tracks fitness goals and health metrics • User-friendly interface • Encourages wellness management 	<ul style="list-style-type: none"> • Does not provide health-related recommendations • No feature for health history data storage • Missing key health features e.g. vaccinations and screenings • Limited transferability across non-Apple platforms 	<ul style="list-style-type: none"> • Platform agnostic • Comprehensive focus on all aspects of wellness • Promotes proactive wellness with tangible recommendations • Shareable across providers, caregivers, and loved ones
	<ul style="list-style-type: none"> • Aggregates medical records, labs, medications, and other health data • Integrates with various healthcare providers and apps • User-controlled platform 	<ul style="list-style-type: none"> • Limited adoption • Reliant on third-party data sources for integrations • Early stage of development compared to competitors, with features and functionality still evolving 	<ul style="list-style-type: none"> • Empowers users with personalized recommendations and tools for proactive health engagement • Provides granular control over data access and sharing



- Provides access to medical history, lab results, medications, and immunization records
- Medical appointments and medication management
- Enhances the provider-patient interaction and data sharing

- Limited capture of data outside of clinical encounter
- Does not provide lifestyle-related health recommendations
- Limited portability outside of participating clinics
- Language not tailored for non-medical experts

- Captures holistic health data during and outside of clinical encounters
- Provides personalized lifestyle health recommendations based on established clinical guidelines
- Language is tailored for lay audiences



- Comprehensive EHR suite for managing patient medical records, billing, scheduling, and other workflows
- Deep integration with hospital systems

- Complex interface for most users, including clinicians
- Limited interoperability with other EHR systems, hindering data exchange
- Primarily clinic and billing focused, not patient-centric

- Freemium model with basic features free to all users
- User-friendly design for ease of use for non-experts
- Interoperability across devices, health systems, and lifestyles



KEY TAKEAWAYS

Untapped Opportunity: Existing solutions lack a truly unified, user-friendly approach. This is a clear opportunity that we can capitalize on with our solution.

Actionable Insights are Key: While competitors collect data, our focus on personalized recommendations and actionable insights provides a clear differentiator.

Ownership Matters: People want control over their health information. [Company]'s emphasis on data ownership and secure sharing positions it as a trusted solution in a privacy-conscious world.

9.0 SWOT ANALYSIS

STRENGTHS

- **First-Mover Advantage:** First to market with a comprehensive, user-centered health data platform that combines data aggregation, personalized insights, and secure sharing.
- **User-Friendly Interface:** The intuitive design and ease of use make the platform accessible to a broad audience, regardless of technical skills.
- **Comprehensive Data Integration:** Seamlessly integrates data from diverse sources.
- **Robust Security Measures:** Advanced security technology and regular audits.
- **Strong Value Proposition:** [Company] offers a compelling combination of features and benefits that address key unmet needs in the market.
- **Experienced Team:** The team possesses expertise in data analytics, security, healthcare, and technology, enabling effective product development and market execution.

WEAKNESSES

- **Limited Brand Recognition:** As a new entrant, we lack established brand recognition compared to larger players in the market.
- **Dependence on User-Generated Data:** Data quality and completeness rely on user engagement and accurate input.
- **Potential for Data Integration Challenges:** Integrating with various healthcare systems and devices can be complex and may present ongoing technical challenges.
- **Reliance on External Partnerships:** Success relies on securing and maintaining strategic partnerships with healthcare providers, research institutions, and other organizations.

OPPORTUNITIES

- **Growing Market Demand:** The increasing adoption of wearable technology and growing consumer interest in personal health management create a significant market opportunity.
- **Expanding Partnerships:** Collaborations with health systems, insurers, and wellness companies can expand reach and enhance our platform's value proposition.
- **Personalized Health Coaching Integrations:** Partner with certified health coaches or develop in-house coaching programs to offer personalized guidance and support to users.
- **International Expansion:** We have the potential to expand into global markets, leveraging our platform's adaptability and universal appeal.

THREATS

- **Competition from Established Players:** Large tech companies and existing health data platforms pose a competitive threat.
- **Regulatory Changes:** Evolving regulations related to health data privacy and security could necessitate adjustments to our platform and business model.
- **Economic Downturns:** Could impact premium subscription rates and user spending on healthcare services.
- **Technological Advancements:** Rapid technological change requires continuous innovation to stay ahead of the curve.

S

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10.0 TEAM



[NAME] — [POSITION]

[NAME] is an epidemiologist and health equity leader with over a decade of experience leading large international epidemiological cohort studies. She has innovated both conceptual and empirical approaches to clarifying the social and molecular drivers of disease in underserved populations. [NAME] has published over 170 peer-reviewed publications, and her research program has been continuously funded by the National Institutes of Health, Susan G. Komen, and the V Foundation. She is a major oenophile and a lover of all things history and culture.



[NAME] — [POSITION]

[NAME] is a seasoned software engineer with over a decade of experience in designing and developing cutting-edge applications. He specializes in building robust backend systems, cloud-based architectures, and AI-driven solutions. He holds a master's degree in computer science from Binghamton University and a bachelor's in computer engineering from the University of Mumbai. He is driven by a passion for innovation and a commitment to delivering impactful solutions.



[NAME] — [POSITION]

[NAME] is a clinician with over 20 years of experience in internal and hospital medicine. He completed medical training and fellowship in Europe and a master's degree in health management at Harvard University. He is a passionate social entrepreneur and an avid ski enthusiast.



[NAME] — [POSITION]

[NAME] is a Senior Financial Analyst with over 15 years of experience in forecasting, planning, and analysis across consulting, R&D, and software industries. She holds a bachelor's degree in finance from Michigan State University and a master's in business administration from The College of Saint Rose. Ruhama enjoys tennis, warm-weather travel, and is a true crime enthusiast.



[NAME] — [POSITION]

[NAME] is an experienced professional with a background in law, regulatory reporting, compliance, and financial analysis. She is passionate about technology and digital transformation, with deep insights into legal-regulatory trends and the emergence of regulatory technology solutions (RegTech) and their role in solving regulatory challenges. Abi enjoys cooking, watching movies, and being outdoors.

11.0 FUNDING & ASK

[Company] is seeking \$500,000 in funding to accelerate our growth and capitalize on the significant market opportunity. This investment will enable us to:

Product Development

(\$250,000)

This funding will be used to enhance core product functionality, ensuring a seamless and robust user experience. Key initiatives include:

- Integration with major EHR systems (e.g., MyChart) to enable direct import of medical records.
- Development of secure sharing features, allowing users granular control over data access for providers and caregivers.
- Rigorous quality assurance testing.
- Scaling technical infrastructure to accommodate user growth.
- Providing high-quality user support.

Sales & Marketing

(\$100,000)

This investment will drive user acquisition and build brand awareness through:

- Targeted social media, print, and online advertising campaigns.
- Development of compelling brand assets and storytelling to resonate with target audiences.

Business Development

(\$130,000 - for one year)

This allocation will fuel strategic partnerships and drive user growth:

- Establishing partnerships with healthcare providers, payers, and other relevant organizations.
- Negotiating and managing contracts with partners and sponsors.
- Executing user acquisition strategies to drive sign-ups.
- Securing sponsorships to diversify revenue streams.

Legal

(\$20,000)

This will cover essential legal expenses:

- Ensuring compliance with data privacy regulations (e.g., HIPAA).
- Securing intellectual property protection.
- Establishing contracts and agreements.

This targeted allocation of funds will enable us to achieve our key milestones, solidify our market position, and ultimately build a sustainable foundation for long-term growth.

12.0 FINANCIAL PROJECTIONS

12.1 SALES FORECAST

	2025	2026	2027	2028	2029
Revenue Forecast					
Recurring Revenue					
B2C Users subtotal	20,030	77,923	184,748	382,155	747,187
Clinical Trials Revenue	131,964	502,482	1,164,080	2,348,570	4,472,236
Corporate Sponsor/Partner Revenues	64,000	67,200	70,560	74,088	77,792
Recurring Revenue Forecast	215,994	647,605	1,419,388	2,804,814	5,297,215
One-off Revenue Forecast	-	-	-	-	-
Revenue Forecast	215,994	647,605	1,419,388	2,804,814	5,297,215

12.2 OPERATING COSTS

	2025	2026	2027	2028	2029
General & Admin					
Web hosting	500	515	530	546	563
Backend server	3,500	3,605	3,713	3,825	3,939
Cloud data storage	2,400	2,472	2,546	2,623	2,701
Customer acquisition (Google ads, facebook ads)	10,000	10,300	10,609	10,927	11,255
Full patent application (optional)	15,000	15,450	15,914	16,391	16,883
Dashboard analytics	15,000	15,450	15,914	16,391	16,883
Legal Support	20,000	20,600	21,218	21,855	22,510
Other Fixed Cost 2	-	-	-	-	-
Other Fixed Cost 3	-	-	-	-	-
Other Fixed Cost 4	-	-	-	-	-
Other Fixed Cost 5	-	-	-	-	-
Fixed costs subtotal	66,400	68,392	70,444	72,557	74,734
Core Team subtotal	388,251	388,251	399,899	411,895	424,252
Domain name registration	4,158	-	-	-	-
Business Registration	442	-	-	-	-
Provisional Patent Registration	963	-	-	-	-
Other One Time Cost 1	-	-	-	-	-
Other One Time Cost 2	-	-	-	-	-
Other One Time Cost 3	-	-	-	-	-
One Time Costs subtotal	5,563	-	-	-	-
General & Admin Forecast	460,214	456,643	470,342	484,453	498,986

12.3 PROFIT AND LOSS (P&L) STATEMENT

Income Statement FORECAST		2025	2026	2027	2028	2029
Revenue Forecast						
Recurring Revenue Forecast		215,994	647,605	1,419,388	2,804,814	5,297,215
One-off Revenue Forecast		-	-	-	-	-
Revenue Forecast		215,994	647,605	1,419,388	2,804,814	5,297,215
	Forecast YoY Growth %	n/a	200%	119%	98%	89%
Direct Costs Forecast		9,426	36,968	88,212	183,310	359,539
Gross Profit Forecast		206,568	610,636	1,331,176	2,621,503	4,937,677
	Forecast GM%	96%	94%	94%	93%	93%
Sales & Marketing Forecast		80,000	82,400	84,872	87,418	90,041
General & Admin Forecast		460,214	456,643	470,342	484,453	498,986
Research & Development Forecast		-	-	-	-	-
EBITDA Forecast		(333,646)	71,593	775,961	2,049,632	4,348,650
	Forecast EBITDA margin %	(154%)	11%	55%	73%	82%
D&A Forecast		-	-	-	-	-
EBIT Forecast (Operating Income)		(333,646)	71,593	775,961	2,049,632	4,348,650
Debt Interest Expense Forecast		-	-	-	-	-
Other Expense Forecast		-	-	-	-	-
Other Income Forecast		-	-	-	-	-
Net Profit Forecast		(333,646)	71,593	775,961	2,049,632	4,348,650
Forecast Corporation Tax		-	-	128,477	512,408	1,087,162
Profit After Tax Forecast		(333,646)	71,593	647,484	1,537,224	3,261,487
	Forecast YoY Growth %	n/a	-121%	804%	137%	112%
	Net Profit Margin %	(154.5%)	11.1%	45.6%	54.8%	61.6%

13.0 APPENDIX: FINANCIALS

Cash Flow FORECAST

	2025	2026	2027	2028	2029
Operations Forecast					
Cash In Forecast	222,040	658,348	1,438,851	2,840,435	5,362,755
Cash Out Forecast	549,640	576,011	643,427	883,658	1,460,974
Cash from Operating Activities	(327,600)	82,337	795,424	1,956,777	3,901,781
Investments Forecast					
Net Financial Investments	-	-	-	-	-
CAPEX	-	-	-	-	-
Cash from Investing Activities	-	-	-	-	-
Financing Forecast					
Net Debt Issued	-	-	-	-	-
Equity Funding	500,000	-	-	-	-
Disbursements	-	-	-	-	-
Cash from Financing Activities	500,000	-	-	-	-
Total Cash Flow Forecast	172,400	82,337	795,424	1,956,777	3,901,781
Cash Balance Forecast	172,400	254,737	1,050,161	3,006,938	6,908,719

Balance Sheet Forecast

	2025	2026	2027	2028	2029
ASSETS (owned by the business)					
Cash	172,400	254,737	1,050,161	3,006,938	6,908,719
Accounts Receivable	-	-	-	-	-
Inventory	-	-	-	-	-
Prepaid Expense	-	-	-	-	-
Financial Investments (Principal)	-	-	-	-	-
Capitalised purchases	-	-	-	-	-
Opening depreciation	-	-	-	-	-
Current Year Depreciation	-	-	-	-	-
TOTAL ASSETS	172,400	254,737	1,050,161	3,006,938	6,908,719
LIABILITIES (owed to third parties)					
Accounts Payable	-	-	128,477	512,408	1,087,162
Deferred Income	6,047	16,790	36,253	71,875	137,414
Debt	-	-	-	-	-
TOTAL LIABILITIES	6,047	16,790	164,730	584,283	1,224,576
EQUITY (owed to shareholders)					
Capital Contributions (Equity funding)	500,000	500,000	500,000	500,000	500,000
Retained Earnings					
Opening retained earnings	-	(333,646)	(262,053)	385,431	1,922,656
Current Year Profit	(333,646)	71,593	647,484	1,537,224	3,261,487
Current Year Disbursements	-	-	-	-	-
TOTAL SHAREHOLDER EQUITY	166,354	237,947	885,431	2,422,656	5,684,143
TOTAL LIABILITIES PLUS EQUITY	172,400	254,737	1,050,161	3,006,938	6,908,719