

## INSURANCE SECTOR



# David Stone

Treatment Center CEO  
Not in recovery

55 years old  
San Francisco, CA

Master's Degree in Business  
Administration

## QUOTE

"I'd like to be a  
innovator in my field  
while saving money for  
my company."

## BACKGROUND

David worked his way up from a TxC caseworker to his current role. His CEO style is democratic but he's played it safe for too long. He feels the need to take chances lately because he's nervous being voted out by the board of directors.

## WHAT INTERESTS THEM ABOUT WECONNECT

He'd like to collect recovery data while becoming an innovator in his field. He feels it would be advantageous to have stable statistics from WEconnect to present to the board of directors.

## CORE RESPONSIBILITIES

- Final decision maker
- Hiring staff
- Compliance
- Contract negotiation
- Revenue
- Updates to board of directors

## CHALLENGES

- Clients are financially unstable
- High employee turnover
- Insurance billing
- Red tape
- HIPPA compliance
- Pricing

## BUSINESS RELATIONSHIPS

### Patients:

He wants to maximize intake of patients. He does not prioritize being connected to patients' daily lives.

### Insurance:

It is necessary for him to stay up to date with insurance policy requirements.

## BIGGEST CONCERN ABOUT WECONNECT

He is concerned about the cost the products, the lack of users, no clinical trials, and an unproven track record. He desires to reduce employee turnover and increase efficiency.

## HOW WECONNECT CAN HELP

**Increase revenue**  
**Grow alumni base**  
**Monetize aftercare**  
**Improve recovery rates**

## MOTIVATORS

**Revenue**  
**Differentiate to be unique**  
**PR recognition**  
**Board of Directors**

## TOOLS

Email

Phone

Meetings

1-on-1



## TREATMENT CENTERS



# Jessica Burgess

**Case Manager**  
In recovery 3 years

28 years old  
Los Angeles, CA

Associate's degree/ 12 month  
training program

## QUOTE

"Only an addict gets  
an addict."

## BACKGROUND

Jessica focuses on giving back to the recovery community. She cares a lot about her clients but gets overwhelmed with the number of clients she supports.

## WHAT INTERESTS THEM ABOUT WECONNECT

She's most interested in data on relapse, improvement metrics, and the ability to see risk levels in order to take action on that information. The app can be a conversation starter for patients that have a problem sharing. She's excited that the GPS verification addresses the issue of clients lying about their progress and adherence to their recovery plan.

## CORE RESPONSIBILITIES

- 1-on-1's with patients
- Ensure patients are attending meetings
- Draft service plans, review case progress and determine case closure
- Meet with patients and make sure they're following treatment plan

## CHALLENGES

- Heavy caseload
- Patient engagement
- Efficiency
- Managing patient volume
- Finding tools to help groups stay on track

## BUSINESS RELATIONSHIPS

### Patients:

She supports patients while in treatment via one-on-ones or phone calls. Once the client is discharged she is no longer in contact with them.

### Families:

She has calls with families to gain a fuller picture of the client, and provides families with a toolkit to help with the client's recovery.

## BIGGEST CONCERN ABOUT WECONNECT

She may not be a leadership role in the treatment center but she can see many benefits to the app. It can play an important role for her patients IOP. She may be our prime target persona.

## HOW WECONNECT CAN HELP

**Provide patient data**  
**Monitor Risk Levels**  
**Verify routine locations**  
**Prioritize intervention**

## MOTIVATORS

**Patient success**  
**Community respect**

## PRIMARY TOOLS OF COMMUNICATION

**Phone - text/voice**

**Social media**

**Email**

**1-on-1**

**Kipu**



## PATIENTS



# Lisa Silver

Patient

90 days in recovery  
(Has been in recovery 3 times)

40 years old  
Maplewood, NJ

## QUOTE

"I'm excited to be back on track with my recovery and start the next phase of my life."

## BACKGROUND

Lisa earned her Master's degree in English literature at NYU before entering a career in magazine publishing. Now after 30 years she has been laid off. Her husband continues to work but she has relapsed again due to the all the free time she now has.

## WHAT INTERESTS THEM ABOUT WECONNECT

Lisa is a bit of a type A personality that likes the idea of creating a schedule to structure her life.

### GOALS

- ☐ Rebuild her life with healthy habits
- ☐ Start a new career
- ☐ Open her own business
- ☐ Rebuilding trust with friends and family
- ☐ Not fall into old habits while working from home alone

### CHALLENGES

- ☐ She has been through recovery three times
- ☐ Rebuilding trust with friends and family
- ☐ Rebuilding her life while starting a new career
- ☐ Feeling isolated and alone

## BUSINESS RELATIONSHIPS

### PATIENTS:

She is active in the recovery community and has many in her support circle. She is currently in outpatient treatment and has group meetings with other patients.

### FAMILIES:

Her relationship with her family is paramount to her recovery. Her family has been very supportive through her recovery.

### INSURANCE:

She's on her husband's insurance plan.

### TXC EMPLOYEES:

Trusts clinical team recommendations, follows their advice.

## BIGGEST CONCERN

To not fall into old habits while working from home alone. Boredom and isolation has been huge triggers for relapse in her past. Cost, efficacy, am I going to get in trouble?

## POTENTIAL TRIGGERS OF RELAPSE

**Boredom**  
**Isolation**  
**Social functions**  
**Friends**

## MOTIVATORS

**Social status**  
**Self-worth**  
**Her family**

## PRIMARY TOOLS OF RECOVERY

**Achieving goals**

**Support groups**

**Structure**

**Postive reinforcement**

**Prayer**



## TREATMENT CENTERS



# Nancy Steiner

Clinician

In recovery 10 years

40 years old  
Canton, OH

Masters: Behavioral Health/  
Social Sciences

## QUOTE

"One day at a time."

## BACKGROUND

Nancy has been in recovery and working as a clinician for almost a decade. Even though she has seen success stories, she feels bit burnt out from her caseload.

## WHAT INTERESTS THEM ABOUT WECONNECT

Even though she would be interested in seeing routine attendance, it's not that pertinent because she's not involved in aftercare of the client.

## CORE RESPONSIBILITIES

- Provide individual and group counseling to program participants
- Conduct lectures
- Provide couple and family counseling
- Refer clients to outside support groups
- Execution of treatment plans and discharge plan

## CHALLENGES

- Career burnout
- Lack of support
- Holding clients accountable
- Having data to support what works and what doesn't.

## BUSINESS RELATIONSHIPS

### Patients:

She develops a detailed account of the client's experience with substance abuse including previous relapses. She documents warning signs and ways patients can best manage them. She creates a detailed list of family, friends, and counselors that can be used as a support network. Lastly, she helps the client develop an emergency relapse plan.

### Families:

She can help patients families in a variety of ways, from mediating family therapy sessions, to helping them locate a support group. Works with the family to share the clients's current progress and expected discharge date

### Insurance:

She conducts case reviews with insurance companies and HMOs.

## BIGGEST CONCERN ABOUT WECONNECT

Accuracy of location based check-ins.

## HOW WECONNECT CAN HELP

**Save time**  
**Provide patient data**  
**Monitor Risk Levels**  
**Verify routine locations**  
**Prioritize intervention**

## MOTIVATORS

**Patient success**  
**Peer recognition**  
**Treatment Plans**

## PRIMARY TOOLS OF COMMUNICATION

**Phone - voice/text**

**1-on-1**

**Events**

**Support meetings**

**Kipu**



## TREATMENT CENTERS



**Rex  
Taylor**  
Alumni Coordinator  
In recovery 7 years

39 years old  
Jacksonville, FL

Bachelor degree: Liberal Arts

## QUOTE

"I had to relearn how to brush my teeth . A routine I never had before treatment. My recovery helped me find that."

## BACKGROUND

Rex's primary responsibility is running weekly support meetings with the alumni of his treatment center. He feels there is a communication gap with all the patients supports.

## WHAT INTERESTS THEM ABOUT WECONNECT

He likes the dashboard for monitoring clients, building their recovery plan, reviewing their risk level, and taking action on that information.

## CORE RESPONSIBILITIES

- Weekly support meetings
- Planning and running events
- Fundraiser events
- Alumni newsletter
- Setting budget
- Developing sales pipeline

## CHALLENGES

- Too many patients / paperwork
- Getting past clients to engage
- Losing contact with alumni
- Having data to support what works and what doesn't.

## BUSINESS RELATIONSHIPS

### Patients:

He will reach out to patients in aftercare, send newsletters on updates of TXC and events, and run events to bring people together.

### Families:

He works with families and helps patients transition to a new way of life after addiction treatment.

### Insurance:

He will maintain regular contact and relationships with benefit providers for members, such as insurance companies, local and national businesses.

## BIGGEST CONCERN ABOUT WECONNECT

Rex could be our customer that notices us and recommends us to his director or CEO. His role will actually look at dashboard and interact with our functionality.

## HOW WECONNECT CAN HELP

**Discharged data to  
reconnect with alumni**

## MOTIVATORS

**Fundraising  
Repeat patients**

## PRIMARY TOOLS OF COMMUNICATION

**Phone - voice/text**

**Newsletter**

**Events**

**Support meetings**



## PATIENTS



# Ronnie Jennings

Patient

30 days in recovery

24 years old  
New York, NY

## QUOTE

"Being sober is boring.  
But I gotta get my shit  
together"

## BACKGROUND

Ronnie has been an addict for most of his life. He frequently has problems in school and also with law enforcement. He has hit rock bottom and broke into his parent's house to steal valuables to pay for his habit. His parents put him through treatment with a ultimatum: Get sober or we don't want to be a part of your life anymore. His addiction has also caused a number of health complications.

## WHAT INTERESTS THEM ABOUT WECONNECT

He actually hates us. He hates his privacy being violated. He didn't want to use our app but was forced as part of his aftercare plan.

## GOALS

- Finding a sponsor
- Create structures and routines to help break old habits and reinforce new ones
- To thrive in recovery
- Become part of something fulfilling
- Find a place safe from judgment

## CHALLENGES

- Breaking old habits and routines is hard
- The tools learned in recovery are great in theory, but difficult to do without support
- Giving himself credit for successes and positive changes to life
- Feeling isolated and alone
- Relationships with family and friends
- Staying on his treatment plan

## BUSINESS RELATIONSHIPS

### PATIENTS:

He has formed relationships with the other patients in his support group. He trusts other addicts more than non-addicts.

### FAMILIES:

His relationship with his family is at a breaking point. He often blames his family for his addiction. He hasn't talked with his family for quite some time.

### INSURANCE:

He is covered under his father's insurance.

### TXC EMPLOYEES:

Trusts those that are similar to him (males in recovery), but annoyed by everyone else

## BIGGEST CONCERN

He's not sure he can commit to his recovery. And he's worried about damaging his relationship with his family. He didn't want to use our app, but it is a mandatory part of his aftercare plan.

## POTENTIAL TRIGGERS OF RELAPSE

**Provide accountability**  
**Alerting on Risk Level changes**  
**Incentivizing recovery**  
**Encouraging recovery plan adherence**

## MOTIVATIONS

**Fear**  
**Praise**  
**Power**  
**Social relationships**

## PRIMARY TOOLS OF RECOVERY

**Rewards**

**Social relationships**

**Feeling of success**

**Positive Reinforcement**



## SUPPORTERS



# Steve & Barbara

## Family

Never in recovery

55 and 56 years old  
New York, NY

## QUOTE

"We try to be there for people when they need us and be a positive influence."

## BACKGROUND

A family member is new in recovery, and getting their life back on track. Their son Ronnie just got out of jail and treatment. This is their final straw before they cut ties.

## WHAT INTERESTS THEM ABOUT WECONNECT

They are potential purchaser in the payment portal. Want to assess progress being made of their loved ones and want to do something to help

## GOALS

- Saving the life of a family member
- Pay for treatment
- Helping their son stick to recovery
- Improving the quality of life for their son and themselves
- Improve relationships with loved ones

## CHALLENGES

- Steve and his son's relationship has hit rock bottom and they don't talk
- Patient is very ill and has a habit of dishonesty
- Lack of trust in patient, exhaustion and stressed
- Detachment of personal responsibility or guilt

## BUSINESS RELATIONSHIPS

**PATIENTS:** The only relationship with patients is with their son. They do not participate in any type of group therapy.

**FAMILIES:** Their extended family is also at the end of their rope with their relationship with Ronnie. Many family members have encouraged them to cut ties with Ronnie due to past behavior. His mother remains one of his only advocates.

**INSURANCE:** Steve's insurance pays for Ronnie's treatment.

**TXC EMPLOYEES:** They chose current treatment center and they are paying for it

## BIGGEST CONCERN

Concerned WEconnect doesn't give enough insight, free money.

## PRIMARY MEANS OF SUPPORT

**Keep loved one in recovery**  
**Provide recovery support**

## MOTIVATORS

**Structure**  
**Trust**

## PRIMARY TOOLS OF COMMUNICATION

**Phone - voice**

**Facebook messenger**

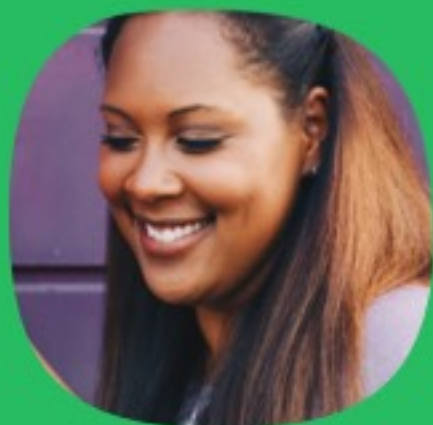
**Television**

**1-on-1**

**Social Media**



## TREATMENT CENTERS



# Tiffany Markham

**Admissions**  
**Not in recovery**

46 years old  
Savannah, Georgia

Some college

## QUOTE

"Don't let your past steal your present."

## BACKGROUND

Tiffany has a innate gift to make people feel comfortable around her. She's a great sales person for the treatment center. It breaks her heart to deal with families that need treatment but can't burden the cost.

## WHAT INTERESTS THEM ABOUT WECONNECT

As the TxC lead for sales, marketing and payments, Tiffany likes that WEconnect helps her pitch the TxC as it differentiates from competitors. She uses it to tell the story that the TxC continues to care for the client after they leave treatment. She uses the Discharged Patient Dashboard to stay in-touch with alumni.

## CORE RESPONSIBILITIES

- ☐ Onboarding new patients
- ☐ Insurance verification/payment
- ☐ Patient outreach
- ☐ Sales rep for treatment centers
- ☐ Marketing
- ☐ Patient Privacy
- ☐ Data entry of patient assessment

## CHALLENGES

- ☐ Cost of treatment
- ☐ Lack of support
- ☐ Selling treatment efficacy
- ☐ Doesn't have a wrap-around treatment model that includes family program and aftercare follow up

## BUSINESS RELATIONSHIPS

### PATIENTS:

She keeps in touch with clients.

### FAMILIES:

She's the first point of contact to admit a client. Not much contact after that unless there's a issue with an payment.

### INSURANCE:

She is the main point of contact between the treatment center and insurance companies.

## BIGGEST CONCERN

Additional onboarding, cost for treatment puts strain on an already difficult financial burden for the families.

## HOW WECONNECT CAN HELP

**Provides sales/marketing content**  
**Increase value of TxC package**

## MOTIVATORS

**More patients**  
**Industry differentiators**  
**Success stories**  
**Streamline process**

## PRIMARY TOOLS OF COMMUNICATION

**Phone - voice/text**

**1-on-1**

**Email**

**Social media**