

Key Evaluation Criteria & The Path to Partnership

Goal of Partnership

Participants

TREND HEALTH PARTNERS

COMPANY TEAM

EXECUTIVE SPONSORS

Key Evaluation Criteria

LISTED IN ORDER OF IMPORTANCE

1

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3

4

Path to Partnership

Description	Date	Owner	Status
INFORMAL DISCOVERY CALL			
Detail & background on TREND, value pillars of our offering, problems we solve, strategies we enable, etc.			
Let prospect articulate their problem statement			
Engage in understanding the health plans payment integrity story/journey/strategy/ current state			
See if they already have a point of view or strategic initiative that they're focused on, but if they don't, suggest other plans that we work with in a similar stage of PI as them, possible approaches, frame a point of view for them, etc.			
HIGH LEVEL DEMO - CAPABILITIES FOCUSED			
Frame the lens and perspective through which we're viewing the demo together (conceptual with a dummy Itemized Bill or medical record case			
Align on where CAVO fits within a typical claim review workflow via a diagram, and use the diagram to align with them about their existing nurse/coder review team			
USE CASE DEEP DIVE & OPPORTUNITY ANALYSIS			
Conversation to understand their reaction after the demo, and unpack their use case and business in depth to align on whether there is legitimate opportunity			
Understand their perception of the problem, if they've attempted to solve it and if so, what was the outcome, has the problem been quantified, is their organizational wide commitment to solving it, what happens if they don't solve it, etc.			
Walk them through a client case study or success story that matches what they're up against and trying to solve/accomplish			
Alignment on their perception of ROI, begin discussing ballpark pricing			
IN DEPTH DEMO OF CAVO WITH CLINICAL/CODING EMPHASIS			
Specific use case demo aligned with their use cases to showcase specific CAVO value			
Introduction of TREND SME to the plans nurse/coder SME's for general confidence and rapport building			
IN DEPTH DEMO OF CAVO OF THE PROSPECTS ACTUAL DOCUMENTATION (ITEMIZED BILL OR MEDICAL RECORDS)			
Generate confidence CAVO performs on their cases			

Path to Partnership

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DELIVERY OF OPPORTUNITY ANALYSIS			
Walk through an in depth business profile of the prospects data like number of reviewers, volumes, recoveries, vendor spend, and other detail that enables us to put together a financial opportunity analysis			
DELIVERY OF BUSINESS APPROACH BRIEF			
Sales populates the approach, strategy, and financial opportunity in a formal "point of view/approach" document (pre-proposal)			
REVIEW BUSINESS APPROACH TOGETHER AND CONTINUE INFLUENCING POINT OF VIEW/APPROACH			
Understand project evaluation roadmap and approval process, any additional stakeholders, etc.			
Review financial opportunity analysis together with the business approach			
Align on proposed pricing and budget ask of prospect			
UNDERSTAND IF "PROVING" ACTIVITIES ARE COMPLETE OR IF THERE ARE OTHER TASKS TO ACCOMPLISH TOGETHER			
Understand project evaluation roadmap and approval process, any additional stakeholders, etc.			
FORMAL PROPOSAL/BUSINESS CASE			
PREP WITH CHAMPION ON PROPOSAL ARTICULATION TO LEADERSHIP AND C-SUITE			
SECURITY REVIEW			
SHARING OF LEGAL PAPERWORK (MSA, NDA, BAA, ETC.)			
IMPLEMENTATION PREPARATION WHILE LEGAL REVIEW IS HAPPENING			
What does the prospect need to begin gathering or preparing for internally to hit the ground running in implementation			