



**LifestyleCX** is transforming how consumers find personalized adult care options, with expert guidance and precise profile building. Our platform gives senior care providers the tools to know more about their prospects and customers, streamlines their sales process, and uses personalization to win, satisfy and keep more clients.

This consumer-centric platform built around personal profiles and smart data, will disrupt the industry standard and derive its revenue from senior care providers through commissions on leads, subscriptions, upgrades, data analytics.

**Market:** 7.3 Trillion Economic Activity in the 55+ market, 88MM aging consumers, 60,000 providers. Senior housing is a **\$74B** market (32,000+ senior living communities nationwide). Home care is **\$125B**, and skilled nursing **\$300B**. Sales and marketing spend within these industries approximates **\$25B** annually. The aging population will create unprecedented demand for the services of the senior living and home care industries in the coming decades. The LifestyleCX team has leveraged its deep industry knowledge and relationships to validate the market need and associated budgets within the senior care industry through feasibility interviews with more than 30 C-level executives.

The senior care industry struggles with low occupancy rates, low lead conversion rates (~2-12%) and high 90-day move out rates (~35%). LifestyleCX (LCX) believes personalizing the customer experience will create a game-changing shift in customer expectations in an industry urgently seeking new solutions.

**The Solution:** LifestyleCX focuses on personal preference data, analytics, and building and sharing profiles; all in support of identifying key indicators that increase customer acquisition across senior care. Our solution also identifies and predicts customers who are at risk for moving out or discontinuing services in time for providers to take action. Data captured through our consumer facing website is sent to the LCX app (mobile and web optimized) and provides customer insights to care providers.

**URL:** [www.lifestylecx.com](http://www.lifestylecx.com)

**Industry:** Senior Care (Senior Living/Home Care)

**Employees:** 0 FTE, **Founded:** July 2017

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**Funding Stage:** Angel/Seed

**Funding to date:** \$250K

**Monthly Overhead:** ~\$20K

**Capital Seeking:** \$250K

**Traction to date:** Phase 1 (MVP) complete and beta partnerships with two clients Vitality and Whitney in testing during June 2018.

**Use of Funds:** Software/database development, UI, analytics & modeling, legal/financial, business development, influencer/digital marketing and sales, CRM integrations.

**Terri Sullivan, CEO, Founder,** 25+ years' experience as an entrepreneur, sales & business development executive in small business, Fortune 500 & startups. The last 10+ years with specialty in building and operating start-up SaaS companies for senior living, long term care/post-acute and physicians. Startups include; ConnectedLiving, Caremerge, ClickCare and Care at Hand.

**Brenda Limone, CAO, Co-Founder,** 25+ years as an entrepreneur, business development professional & executive in senior housing and SaaS startup. 7 years at Connected Living, serving senior living and 4+ years executive leadership in resident services for Beacon Communities, a top senior housing provider. Leader in Housing as a Platform for Health (MA) policy initiative. Broad experience project management and go-to-market strategies.

**Kate Berg, COO, Co-founder,** pioneering experience in social media, mobile & SaaS businesses. Recent C-level operational & capital raising roles with \$11+MM in early stage funding to date with 3 successful exits. With 25+ years of digital brand-building expertise, early career involved build-out of global PR/communications divisions for Gartner, KPMG Consulting & Jupiter. Recently President of leading influencer marketing company Collective Bias (VC funded, exited off A round @ \$100M, 11/16).

**Sherard Griffin, CTO,** lean start-up pro. Previously with SAS, having led design and development of the Data Hub, a core component of the SAS Customer Intelligence 360 Suite. Architect of enterprise cloud and on-premises solutions. Leader of teams that solve challenging problems.

**Kalpiti Patel, Solutions Architect,** tech visionary, previously with SAS and Cisco, focus on creating, integrating and evangelizing proven technical solutions and best practices, experience with micro services, cloud-native, distributed-systems architectures, CI/CD, continuous performance & scale, DevOps transformations.

**Michael Fleisher, Advisor** | Led Wayfair through its IPO in 2014 and currently drives finance, HR, M&A and business strategy for the rapidly growing online retailer. Previously Warner Music Group's Vice Chairman, Strategy and Operations & served as CEO at Gartner during its record growth period.

**Jeff Makowka, Advisor** | 50+ Market Expert in digital health space. 12 years at AARP driving Innovation & thought leadership.

By empowering provider teams to share currently “siloes” data, care teams will have more information on their customer to engage with them in a more personalized way, leading to an enhanced customer experience, increased customer acquisition, reduced move-outs, and improved lifetime value of customers.

Consumers have limited options for finding and vetting out senior care options. There is no **trusted** source or website that leverages a personal profile, consolidates reviews and ratings of various providers in the industry, and educates consumers. Our free to the consumer website, LifestyleSense, makes “sense” of senior care and is a forum for consumers in the market for senior housing and home care services. Through machine learning and crowd knowledge, we assist consumers in evaluating services and experiences offered by various communities and care providers. LCX empowers the consumer to drive their own experience using our content rich website and robust recommendation engine, to be matched to providers based on their personal interests, values and preferences. By matching the right prospect to the right provider, everyone wins.

**Consumer Marketing Strategy:** LifeStyleCX will use best practices to drive demand and leads to our website through:

- Content/influencer marketing
- Demand Generation
- Social media (Targeted ads on LinkedIn/Facebook)
- Emails and articles on senior care websites & publications (based on consumer Lifestyle Profile)
- PPC campaigns through Google AdWords

**Sales & Channel Partner Strategy:** In addition to a direct inside and outside sales effort we will scale through partnerships, revenue sharing opportunities and reseller agreements with a range of companies across business and technology, including:

- CRM/Hubspot integration
- Care Platforms (partnership discussions underway with PointClickCare, the largest care platform in the industry)
- Strategic partnership with SeniorLivingSmart, a marketing automation/content player serving senior living industry
- Group purchasing organizations (GPOs) focused on senior living
- Other websites serving mature populations with products and services
- EAP programs and other benefit aggregators supporting corporate employees
- Relevant publishers serving mature populations or family care givers

**Competition:** The leading competitor in the housing space, ‘A Place for Mom,’ sends straight SEO generated leads to senior living providers (who are their paying clients) and no personal preferences are collected or shared. Digital marketing agencies provide general unqualified lead lists and traditional marketing services (websites, SEO, sales training) also serve this market. Zip code driven websites list available senior housing and home care agencies based on geography. Caring.com is the current competition in the home care space. No competitor offers a recommendation engine for matching consumers’ needs, has data-driven preference profiling, crowd sourcing or lead scoring.

### Sale Projections and Forecast

<b>Profit &amp; Loss</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
<b>Net Sales</b>	<b>\$117,639</b>	<b>\$1,674,274</b>	<b>\$6,425,004</b>	<b>\$17,136,613</b>	<b>\$35,032,814</b>
COGS	\$23,528	\$334,827	\$1,284,907	\$3,427,027	\$7,005,636
<b>Gross Profit</b>	<b>\$94,111</b>	<b>\$1,339,447</b>	<b>\$5,140,097</b>	<b>\$13,709,586</b>	<b>\$28,027,178</b>
Sales & Mktg. Expenses	\$148,700	\$472,761	\$486,944	\$501,552	\$516,599
Operating Expenses	\$236,509	\$794,610	\$1,095,516	\$1,298,441	\$1,380,721
<b>EBITDA</b>	<b>(\$291,098)</b>	<b>\$72,076</b>	<b>\$3,557,637</b>	<b>\$11,909,593</b>	<b>\$26,129,858</b>
Amort., Dep., Int. etc.	\$11,073	\$1,003	\$0	\$0	\$0
Taxes	\$0	\$0	\$0	\$0	\$0
<b>Net Income</b>	<b>(\$302,171)</b>	<b>\$71,073</b>	<b>\$3,557,637</b>	<b>\$11,909,593</b>	<b>\$26,129,858</b>