

General CareIQ Payer

Ideal Customer Profile

Quantitative

- Revenue - \$150M - \$300B
- Covered Lives - 150K+
- Technology Investment - \$1M+
- Salesforce Subscription
 - Health Cloud
 - Marketing Cloud
 - Service Cloud

Qualitative

- Goals
 - Increase automation
 - SF center of information universe
 - Consolidating disparate systems
- Project
 - Value based care
 - SDoH
- Challenges
 - Time management
 - Consistency across team

Buyer Persona



Yusuf User

End Users

- **Titles:** Care Manager, Utilization Manager, Social Worker, Clinical Reviewer, Educator, Managed care coordinator, Personal Health Assistant
- **Pain Points:** Manual work load, unclear process, inconsistent training
- **Features:** Workflows, automation, resources



Larry Leader

Sr. Leader/Budget Owner

- **Titles:** COO, CMO, CEO, CIO, President
- **Pain Points:** Disparate systems, lack of visibility, lack of reporting
- **Features:** KPI reporting, single system



Chelsie Change

Change Management

- **Titles:** Quality/Clinical Improvement, VP of Transformational Change, Center of Excellence (BCBS)
- **Pain Points:** Lack of visibility, disparate systems, inconsistent work, limited processes
- **Features:** KPI reporting, workflows, single system

General EngageIQ

Ideal Customer Profile

Quantitative

- Revenue - 10M+
- Revenue - 150+
- Salesforce Subscription
 - Service Cloud
 - Marketing Cloud
 - Type - enterprise & unlimited

Qualitative

- Goals
 - Increase automation
 - SF center of information universe
 - Consolidating disparate systems
- Project
 - Improve data management
 - Create structure and processes
- Challenges
 - Lack of KPIs and metrics
 - No accountability

Buyer Persona



Urenna User

End Users

- **Titles:** IT Service Tech, Call Center Member
- **Pain Points:** Unclear processes, poor user interface, manual work
- **Features:** Workflows, automation, single source of truth



Luo Leader

Sr. Leader/Budget Owner

- **Titles:** COO, CMO, CEO, CIO, President
- **Pain Points:** Lack of reporting, many disparate systems
- **Features:** Single source of truth, KPI tracking and reports



Max Manager

People Manager

- **Titles:** IT Manager, IT Director, Support Services Manager, Services Manager
- **Pain Points:** Inconsistent work, lack of visibility to team's work
- **Features:** KPI and metric reporting, increased consistency for team processes