

Phased Rollout Proposal

FIKA Infusion + Wellness

Prepared for	FIKA Infusion + Wellness	[Date]
Point of contact	Trevor Brimley	
Prepared by	Pabau	

About this proposal

This plan sets out how FIKA Infusion + Wellness can adopt Pabau across its locations in stages, starting with telehealth and expanding as each phase proves out. You commit to the full platform from the start, but pay as each phase comes live. This gives your team confidence the system fits your workflow before the wider rollout, while securing your pricing and setup from day one.

This is a working draft for discussion. Figures and timings are proposals and can be adjusted together before anything is finalised.

How pricing works

There are two kinds of cost: one-off setup fees, phased with the rollout, and a recurring monthly subscription. They are billed separately.

Item	Type	Amount
Platinum Customer Success Package	On signature	\$1,000
Full Project Management	At Phase 2	\$2,500
One-offs total		\$3,500
Enterprise licence (per user)	Recurring	\$70 /mo
Rollout rate (per user, from Phase 2)	Recurring	\$63 /mo
Care Plus (includes unlimited telehealth)	Recurring	\$526 /mo
Care Plus pilot rate (50% off, Phase 1 only)	Recurring	\$263 /mo
Dedicated Account Manager	Recurring	\$299 /mo
Marketing Plus	Recurring	\$440 /mo
Full recurring at completion		\$5,045 /mo

Full recurring = 60 users at the rollout rate (\$3,780) + Dedicated Account Manager (\$299) + Marketing Plus (\$440) + Care Plus (\$526) = \$5,045/month. See 'The rollout rate' below for how the \$63 rate applies.

Setup fees

The one-off setup fees total \$3,500 and are phased with the rollout. The Platinum Customer Success Package (\$1,000) is paid on signature and covers your telehealth onboarding and pilot support. Full Project Management (\$2,500) is paid when Phase 2 begins, which is when the location migration work starts. Both cover the whole project across all your locations and are not repeated for each phase.

How the monthly cost grows

Your monthly subscription steps up as each phase goes live. You start with telehealth only; the cost grows as booking and EMR come across from Vagaro and Optimantra and more users come on across your locations.

The rollout plan

Three phases. You start with telehealth on 5 users over a 10-week pilot, then replace Vagaro and Optimantra location by location. All figures below are proposals for discussion.

Ph.	Scope	User s	Licences	Add-ons	Monthly	Duration / backstop
1	Telehealth services (all locations)	5	\$350	\$263	\$613	10 wks from go-live
2	First full location: booking + EMR	[]	[\$]	\$825	[\$]	8 wks from P1 trigger
3	Remaining locations	60	\$3,780	\$1,265	\$5,045	8 wks from P2 trigger
	Full recurring	60	\$3,780	\$1,265	\$5,045	

Phase 1 licences are at the standard rate (5 users at \$70). Phase 1 add-ons = Care Plus at the 50% pilot rate (\$263), active from day one so telehealth is unlimited from the first consult. Care Plus moves to its standard rate (\$526) when Phase 2 begins.

Phase 2 adds the Dedicated Account Manager (\$299) when the first location migration begins: add-ons \$825. Phase 2 user count is confirmed at Phase 2 planning.

Phase 3 adds Marketing Plus (\$440) at full rollout: add-ons \$1,265. Full user count at completion: 60 users at the rollout rate = \$3,780.

The rollout rate

The standard Enterprise rate is \$70 per user per month. When Phase 2 begins, every user moves to the rollout rate of \$63, a 10% saving that applies to your original telehealth users as well as new ones. Expanding makes every seat cheaper, not just the ones you add.

The rollout rate holds as long as the rollout completes by [date]. If the rollout is paused or ended before completion, remaining users return to the standard rate. This keeps the saving tied to the plan we agree together.

Moving between phases

Each phase runs for a set period from its start. Phase 1 starts when telehealth goes live; each later phase starts when the one before it completes. A phase moves forward, and the monthly cost steps up, on the earlier of:

- joint sign-off of the Go-Live Checklist for the phase that just went live; or
- the agreed backstop date for that phase.

The backstop keeps the rollout on track so it cannot stall indefinitely. The setup fees are phased as set out above: \$1,000 on signature and \$2,500 at the Phase 2 trigger, with neither repeated for later phases.

What's included from day one

Care Plus is active from Phase 1 at a 50% pilot rate, so your telehealth usage is unlimited from the first consult at half the standard cost. Your Dedicated Account Manager joins at Phase 2 to lead the first location migration off Vagaro and Optimantra, and Marketing Plus comes on at Phase 3 when the full patient base is in one system and CRM automation can work across every location.

How we confirm each phase is ready

Each phase has a Go-Live Checklist (see Appendix A for Phase 1) that confirms Pabau is set up to and supports your workflow. We review it together at the end of each phase. It is a shared readiness check, giving you confidence the system fits before expanding to the next phase.

Your commitment

We will agree the commitment basis together. The two options on the table are a fixed term (for example 12 or 24 months, which locks the rollout rate and add-on pricing for the period) or a monthly rolling subscription after Phase 1 go-live. We are happy to talk through which suits FIKA best.

Next steps

If this plan looks right, we will confirm together: the Phase 2 location and user count, phase durations and backstop dates, and the commitment basis. We then move it into a final agreement for signature. We are glad to walk through any part of this with you, Trevor, and adjust it to fit how FIKA wants to roll out.

Appendix A: Phase 1 Go-Live Checklist

Telehealth services

Client	FIKA Infusion + Wellness	Phase	1 of 3
Scope	Telehealth services	Phase start	Go-live date
Pabau lead		Backstop (start + 10 wks)	
Client lead	Trevor Brimley	Users this phase	5

Purpose

This checklist confirms Pabau is set up to and supports FIKA's telehealth workflow. It is the readiness check for Phase 1, completed together. Sign-off by both parties confirms telehealth is live and ready, and moves the rollout to the first full location.

Tier 1: System configured to your workflow

Proves the build matches how the team actually works.

Criterion	Definition of done	Met
Telehealth booking flow live	Video consult types, durations and practitioner calendars match the real telehealth schedule.	
Clinical charting templates	Charting templates built for FIKA's telehealth consultations and follow-ups.	
AI notes, ICD-10 and e-scribe live	AI-generated notes, ICD-10 coding, labs and e-prescribing configured and tested.	
Patient records available	Telehealth patient cohort imported from Optimantra, accurate and accessible in Pabau.	
Communications set up	Confirmations, reminders and video consult links sending correctly.	

Tier 2: Your team can operate it

Proves staff adoption, not just setup.

Criterion	Definition of done	Met
Staff trained	All telehealth users trained and able to log in.	
Consults delivered in Pabau	An agreed share of telehealth consults booked and delivered in Pabau during the phase window.	
Daily workflow end to end	A full patient journey completed in-system without workarounds: book, consult, chart, bill.	
Charting done in-system	Clinical notes recorded in Pabau, not in Optimantra or on paper.	

Tier 3: It performs in your environment

Proves the system holds up live.

Criterion	Definition of done	Met
Performance acceptable	System speed and availability acceptable during operating hours.	
No critical open tickets	No unresolved critical support issues at the point of sign-off.	
Reporting outputs match needs	Reports produce the data the team needs to operate.	

Phase 1 sign-off

Both parties confirm the criteria above are met. This sign-off confirms telehealth is live and ready, and moves the rollout to the first full location. If anything is outstanding by the backstop date, we agree a plan together to resolve it.

For the Client	For Pabau
Name:	Name:
Role:	Role:
Signature:	Signature:
Date:	Date: