

HealthBiller

COMPETITIVE MARKETING ANALYSIS

December 2022

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Executive Summary

HealthBiller

HealthBiller is a privately owned EHR/Practice Management Software for healthcare industry, it currently does not provide any specialization into any practice segment such as behavioral health.

HealthBiller is currently on the marketplace for an asking price of $500,000 because the current owners have a sister company in the same space. While HealthBiller has done little or no marketing, they have acquired a about 20 practices that are collectively generation about $10,000/month. The only current dedicated employees are 3 programing engineers in the Ukraine that are costing the company about $100,000 per year. This means that currently HealthBiller is operating at a breakeven point.

Dough Lyman the principal architect has a three-year employment contract with the sister company but could be available on a pro-rata basis. The only other expenses currently associated with the company are those involving hosting and domain support.

Consumer Driven Market

Mental illnesses, substance abuse, depression, and anxiety are among the top reasons behind the disability and distress among the people. The demand for the behavioral health services is growing at a promising rate across the globe owing to the rising prevalence of behavioral or mental disorders among the population.

According to the National Alliance on Mental Illness, over 43 million people in America suffers from mental illnesses every year. As per the data provided by the US Department of Health and Human Services, approximately 20% of the adolescents and children suffered from mental health disorders at some point of time in their life. About 10% of people in US suffered from severe emotional disorders at some point of time in their life. Mental health disorders are the most severe causes of rising medical concerns, as per the Mental Health Foundation.

Technology Focused Industry

The behavioral health market in US is witnessing a rapid adoption of the digital technologies. The digital behavioral health space is expected to revolutionize the behavioral health services. According to the Amwell Survey, the adoption of telehealth in psychiatry was around 80%, which reached to 96% during the pandemic. Furthermore, the increased penetration of the smartphones and higher demand for the technologically advanced devices among the US population has favored the growth of the market. Moreover, the regulatory changes by the government regarding the

reimbursement policies pertaining to the telehealth services is further accelerating the demand for the digital behavioral health services.

Total Addressable Market

The U.S. behavioral health care software and services market size was valued at USD 1.1 billion in 2021 and is expected to expand at a compound annual growth rate (CAGR) of 12.12% from 2022 to 2030. The emerging technologies for behavioral health management, rising awareness regarding substance abuse, and expanding reimbursement coverage are contributing to market growth. (Grand View Research)

Conservatively the combined total addressable market for a combined practice management and EHR software for Behavioral Health is $512.6 million. HealthBiller market potential is as follows:

Market Share	Revenue Potential	10X Liquidity
0.5%	$2,563,000	$25 million
1%	$5,126,000	$51 million
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Competitive Market

The U.S. behavioral health care EHS/Practice Management software sector is highly competitive with over 30 competitors who are dedicated or feature various aspects of HealthBiller Software. To conduct our feature, competitive, and marketing analysis, we examined the following competitors.

Company	URL	Behavioral Health Focus	Total Visits Similarweb	Total Monthly Visits Similarweb	Monthly Unique Visitors Similarweb	Visits/Unique Visits Similarweb	Global Rank Similarweb	Country Rank Similarweb	Industry Rank Similarweb
HealthBiller	HealthBiller.com	X	<5000	<5,000	<5000	1.00	16,832,297	4,897,880	N/A
ClinicSource	clinicsource.com	Features	1.653M	551,282	32,524	16.95	97,582	17,156	N/A
Foothold	footholdtechnology.com	Features	1.090M	363,532	35,943	10:11	85,743	15,918	91
Kareo	Kareo.com	Features	8.154 Million	2.718 Million	747,293	3.64	13,067	2,442	160
Luninello	Luminello.com	Dedicated	1.400M	466,840	69,204	6.75	90,119	17,177	98
Procentive (Therapy Brands)	Procentive.com	Dedicated	1.199M	399,899	28,913	13.83	112,564	20,027	123
SimplePractice	Simplepractice.com	Features	31.75M	10.58M	1.552M	6.82	869	N/A	N/A
Therapy Appointment	therapyappointment.com	Dedicated	3.737M	1.245M	213,202	5.84	38,506	6,987	35
TheraNest (Therapy Brands)	TheraNest.com	Dedicated	5.748M	1.916M	240,452	7.97	21,671	4,089	14
TherapyNotes	Therapynotes.com	Dedicated	12.29M	4.099M	281,847	14.55	16,832,297	2,044	6
Valant EHR Suite	Valant.io	Dedicated	2.601M	867,131	170,869	5.07	41,789	8,006	N/A
Therapy Brands	therapybrands.com	Dedicated	81,298	27,309	N/A	N/A	1,280,788	245,502	906
Therabill	Therabill.com	Dedicated	909,783	303,261	37,820	8.02	178,889	31,216	3,082
TheraPlatform	Theraplatform.com	Features	600,219	200,070	75,295	2.66	230,604	45,209	289
My Clients Plus	myclientplus.com	Features	543,286	181,095	26,738	6.77	204,467	35,849	N/A
CounSol.com	counsol.com	Dedicated	486,145	162,048	11,141	14.54	249,786	43,488	325
Behaviorsoft	behaviorsoft.com	Dedicated	330,788	110,263	7,014	15.72	331,174	57,721	N/A
Lightning Step	Lightningstep.com	Dedicated	310,175	103,392	6,965	14.85	341,908	59,707	N/A
Theralytics	Theralytics.net	Dedicated	212,808	70,936	17,811	3.98	421,823	74,101	N/A
Best Notes	bestnotes.com	Dedicated	199,051	66,350	24,854	2.67	615,503	127,857	1,009
Psyquel	Psyquel.com	Dedicated	80,155	26,718	9,924	2.69	793,416	142,432	15,733
AZZLY Rize	Azzly.com	Dedicated	78,163	26,054	>5,000	9.42	656,679	118,229	N/A
nTreatment	ntreatment.com	Dedicated	39,710	13,237	<5,000	2.86	1,504,658	282,037	N/A
Mercury Medical	mercuryhealthcare.com	Features	31,734	10,578	6,656	1.59	4,207,811	1,439,774	63,233
BehaveHealth	behavehealth.com	Dedicated	23,506	7,835	<5,000	2.02	2,448,004	521,692	N/A
Therasoft Online	Therasoft.com	Dedicated	15,695	5,232	<5,000	5.38	2,310,309	476,349	4,543
Exym	Exym.com	Featured	14,661	<5,000	<5,000	1.65	5,206,256	1,434,635	N/A
CAM EHR	EMRsystems.net/cam	Dedicated	12,325	<5,000	<5,000	1.49	4,558,961	1,529,977	N/A
EchoVantage	www.echobh.com	Dedicated	<5,000	<5,000	<5,000	1.4	6,717,737	1,956,000	N/A
PIMSY Mental Health EHR	Pimsyehr.com	Dedicated	<5,000	<5,000	<5,000	1.80	11,211,060	3,767,050	N/A

From the list we identified the top eleven companies that are receiving the most site visits for further analysis. Here is the breakdown of the top eleven companies we identified that have the greatest impact on the behavioral health market segment.

Company	URL	Behavioral Health Focus
HealthBiller	HealthBiller.com	X
ClinicSource	clinicsource.com	Features
Foothold	footholdtechnology.com	Features
Kareo	Kareo.com	Features
Luninello	Luminello.com	Dedicated
Procentive (Therapy Brands)	Procentive.com	Dedicated
SimplePractice	Simplepractice.com	Features
Therapy Appointment	therapyappointment.com	Dedicated
TheraNest (Therapy Brands)	TheraNest.com	Dedicated
TherapyNotes	Therapynotes.com	Dedicated
Valant EHR Suite	Valant.io	Dedicated
Therapy Brands	therapybrands.com	Dedicated

The takeaway is that outside of the top three, two of which are not dedicated to behavioral health, nobody is a predominate player. Only two of the companies have generated funding to accelerate their growth.

The complete analysis of feature set, position in the marketplace and marketing/sales performance will be covered in a separate section of this report.

Size/Funding

A look at the top eleven competitors provides some interesting facts. Only four companies have yearly revenues over ten million dollars ($10M). These are Kareo ($116.2M), SimplePractice ($65.1M), TherapyNotes ($36.2M), Valant EHR Suite ($10.8M) and Therapy Brands ($74.9M).

TherapyNotes is the most dominant independent competitor that is dedicated to behavioral health. They have over four million visitors each month that results in 36.2 million dollars in revenue each year. Having just one dominate player who is wholly dedicated to the behavioral health sector is highly positive. It will allow for on-page and performance SEO strategies to pull traffic and market share from them.

Marketing

This report contains 132 pages of marketing analysis, findings, and recommendations covering the website performance, on-page SEO, performance SEO, influencer marketing, social media marketing, earned media, content marketing, event marketing, email marketing, organic traffic, paid traffic, display ads, etc.

Rather than overly burden this executive summary with the observations, findings, and recommendations, please review each section for that information.

However, the short executive summary is that the website is not designed to engage with search engines nor done to best practices, it will need to be redone. Virtually little or no marketing effort has taken place and it will require significant effort to develop the necessary content for the website and to distribute the content strategically on sites with high domain authority to garner both quality backlinks and website visitors.

A comprehensive omni-channel marketing program needs to be implemented. Marketing is not one single initiative or activity. You must have a fully integrated cross-channel marketing approach that includes content marketing, inbound marketing, outbound marketing, influencer marketing, earned media, public relations, social media, paid advertisement, account-based marketing, etc.

Marketing is first making sure the fundamentals are locked in, then A/B testing everything to find continuous improvements. You must engage the prospect at each stage of the buyer's journey.

For every piece of content or campaign, you must be able to answer which buyer persona it is for and at which stage of the buyer's journey you are targeting. You must also be able to articulate what you believe will be the impact of that initiative.

A strong reseller and referral program needs to be developed and introduced. A lead nurturing and sales enablement program needs to be implemented.

Financial Plan

Putting together a financial plan necessitates making a number of assumptions about the product development, resources, and staffing of any organization. While any such financial planning is wrought with uncertainty, we have tried to mitigate that risk by taking the most conservative approach with respect to:

- Product Development
- Competitive Marketplace
- Product Pricing
- Staffing
- Marketing Budget
- Critical Mass
- Revenue Projection

This section of the report identifies 18 assumptions made in the creation of the financial plan. Failure to adhere or obtain these assumptions will impact the viability of this plan. Which is why in our final analysis and recommendations we built in a 50% error performance error to ensure expectation are realistic.

MONTH	CLIENTS	REVENUE	STEADY	CRITICAL MASS	MONTH	CLIENTS	REVENUE	ENHANCED	CRITICAL MASS	MONTH	CLIENTS	REVENUE	EXPEDITED	CRITICAL MASS
JAN	30	$13,870.00	$ 26,047.00		JAN	35	$14,515.00	$ 34,693.00		JAN	40	$15,160.00	$ 41,507.00	
FEB	40	$15,160.00	$ 24,757.00		FEB	50	$16,450.00	$ 32,758.00		FEB	60	$17,740.00	$ 38,927.00	
MAR	50	$16,450.00	$ 23,467.00		MAR	65	$18,385.00	$ 30,823.00		MAR	80	$20,320.00	$ 36,347.00	
APR	60	$17,740.00	$ 22,177.00		APR	80	$20,320.00	$ 28,888.00		APR	100	$22,900.00	$ 33,767.00	
MAY	70	$19,030.00	$ 20,887.00		MAY	95	$22,255.00	$ 26,953.00		MAY	120	$25,480.00	$ 31,187.00	
JUN	80	$20,320.00	$ 19,597.00		JUN	110	$24,190.00	$ 25,018.00		JUN	140	$28,060.00	$ 28,607.00	
JUL	90	$21,610.00	$ 18,307.00		JUL	125	$26,125.00	$ 23,083.00		JUL	160	$30,640.00	$ 26,027.00	
AUG	100	$22,900.00	$ 17,017.00		AUG	140	$28,060.00	$ 21,148.00		AUG	180	$33,220.00	$ 23,447.00	
SEP	110	$24,190.00	$ 15,727.00		SEP	155	$29,995.00	$ 19,213.00		SEP	200	$35,800.00	$ 20,867.00	
OCT	120	$25,480.00	$ 14,437.00		OCT	170	$31,930.00	$ 17,278.00		OCT	220	$38,380.00	$ 18,287.00	
NOV	130	$26,770.00	$ 13,147.00		NOV	185	$33,865.00	$ 15,343.00		NOV	240	$40,960.00	$ 15,707.00	
DEC	140	$28,060.00	$ 11,857.00		DEC	200	$35,800.00	$ 13,408.00		DEC	260	$43,540.00	$ 13,127.00	
JAN	150	$29,350.00	$ 10,567.00		JAN	215	$37,735.00	$ 11,473.00		JAN	280	$46,120.00	$ 10,547.00	
FEB	160	$30,640.00	$ 9,277.00		FEB	230	$39,670.00	$ 9,538.00		FEB	300	$48,700.00	$ 7,967.00	
MAR	170	$31,930.00	$ 7,987.00		MAR	245	$41,605.00	$ 7,603.00		MAR	320	$51,280.00	$ 5,387.00	
APR	180	$33,220.00	$ 6,697.00		APR	260	$43,540.00	$ 5,668.00		APR	340	$53,860.00	$ 2,807.00	
MAY	190	$34,510.00	$ 5,407.00		MAY	275	$45,475.00	$ 3,733.00		MAY	360	$56,440.00	$ 227.00	17 MONTHS
JUN	200	$35,800.00	$ 4,117.00		JUN	290	$47,410.00	$ 1,798.00	18 MONTHS	JUN	380	$59,020.00	$ (2,353.00)	
JUL	210	$37,090.00	$ 2,827.00		JUL	305	$49,345.00	$ (137.00)		JUL	400	$61,600.00	$ (4,933.00)	
AUG	220	$38,380.00	$ 1,537.00		AUG	320	$51,280.00	$ (2,072.00)		AUG	420	$64,180.00	$ (7,513.00)	
SEP	230	$39,670.00	$ 247.00	21 MONTHS	SEP	335	$53,215.00	$ (4,007.00)		SEP	440	$66,760.00	$ (10,093.00)	
OCT	240	$40,960.00	$ (1,043.00)		OCT	350	$55,150.00	$ (5,942.00)		OCT	460	$69,340.00	$ (12,673.00)	
NOV	250	$42,250.00	$ (2,333.00)		NOV	365	$57,085.00	$ (7,877.00)		NOV	480	$71,920.00	$ (15,253.00)	
DEC	260	$43,540.00	$ (3,623.00)		DEC	380	$59,020.00	$ (9,812.00)		DEC	500	$74,500.00	$ (17,833.00)	
JAN	270	$44,830.00	$ (4,913.00)		JAN	395	$60,955.00	$ (11,747.00)		JAN	520	$77,080.00	$ (20,413.00)	
FEB	280	$46,120.00	$ (6,203.00)		FEB	410	$62,890.00	$ (13,682.00)		FEB	540	$79,660.00	$ (22,993.00)	
			$ 267,359					$ 326,621.00					$ 354,512.00	
ACQUISITION COST			$400,000					$450,000					$500,000	
	21 Months	PROJECTED	$ 667,359			18 Months	PROJECTED	$ 776,621			17 Months	PROJECTED	$ 854,512	
	23 Months	15% (9)	$ 708,315			21 Months	15%	$ 830,390			20 Months	15%	$ 1,275,722	
	30 Months	30% (7)	$ 800,215			25 Months	30%	$ 123,143			24 Months	30%	$ 1,792,010	
	42 Months	50% (5)	$ 965,719			35 Months	50%	$ 1,462,210			34 Months	50%	$ 2,523,418	

Achieving Critical Mass

No business plan ever rolls out as anticipated many corrections will have to be made as new or unanticipated issues arise. However, it is possible build in assumptions and risks, so company principals have a reasonable expectation of the cost and timing to reach critical mass.

There is a direct correlation between the amount of marketing resources available (time and money) and how long it will take to reach critical mass. Our analysis looked at three cost points for a structured monthly budget ($39,917, $49,208, and $56,667). The most significant variable in the monthly budget are marketing costs.

Depending on marketing performance, it will take anywhere from 18 months to 42 months to reach critical mass. The cost to sustain the business during this period ranges from $267,359 to $731,408. The number of new licenses that need to be acquired is between 230-360. The latter number is the worst-case scenario where we spent the maximum each month and our anticipated growth had a 50% error rate.

Based on the competitive marketing analysis, the most reasonable outcome would reach critical mass would be with monthly expenditure of $49,208 for 35 months for a total cost of $631,820. This accounts for a 50% error rate in anticipated performance

Conclusion

HealthBiller can be purchased anywhere from $400,000 to $500,000. Based on the competitive marketing analysis, we believe that the most a critical mass can be reached in 18 months to 42 months. We believe neither the best-case scenario nor the worst-case scenario is the most likely outcomes. The projected cost needed to achieve critical mass factoring a 50% error rate is $631,820 over 35 months. This would require an initial investment by all parties to be $1,031820 (assuming a purchase price of $500,000).

If investors want to account for our worst-case scenario ($56,667 monthly expenditure and a 50% error rate) with a they will need $2,523,418 as the initial investment (assuming a $500,000 purchase rate).

Introduction

HealthBiller

HealthBiller is a privately owned EHR/Practice Management Software for healthcare industry, it currently does not provide any specialization into any practice segment such as behavioral health.

HealthBiller is currently on the marketplace for an asking price of $500,000 because the current owners have a sister company in the same space. While HealthBiller has done little or no marketing, they have acquired a about 20 practices that are collectively generation about $10,000/month. The only current dedicated employees are 3 programing engineers in the Ukraine that are costing the company about $100,000 per year. This means that currently HealthBiller is operating at a breakeven point.

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Technology Focused Industry

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Total Addressable Market

The global electronic health records market size was estimated at USD 27.2 billion in 2021 and it is anticipated to expand at a CAGR of 4.0% from 2022 to 2030. In 2030 the revenue generated from this market is forecast to be $38.5 billion. (Grandview Research)

The web based EHR segment led the market for electronic health records and accounted for the largest revenue share of more than 50.0% in 2021. This large market share is attributed to their popularity amongst the physicians and healthcare providers, which operate on a smaller scale.
North America dominated the market for electronic health records and accounted for the largest revenue share of about 45.4% in 2021. The major factor contributing to the growth of this region is the policies that support the adoption of electronic health records and the availability of infrastructure with high digital literacy. In May 2020, the federal government proposed the Federal Health IT Strategic Plan 2020 - 2025 that mandates the meaningful usage of electronic health records by healthcare providers.

The market is dominated by a few major players including:

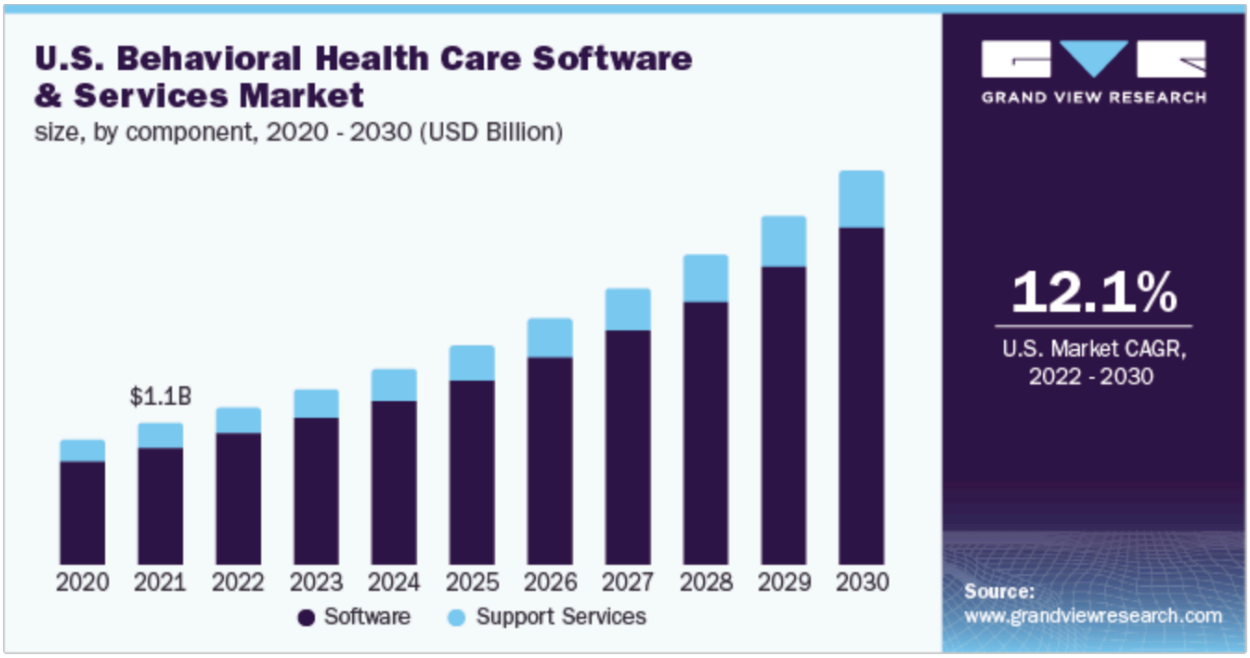
- Cerner Corporation
- GE Healthcare
- Allscripts HealthCare
- McKesson Corporation
- Epic Systems
- NexGen Healthcare
- eClinicalWorks

Industry analysis have concluded that the dominate players have locked up the Acute hospital segment of this industry and believe that any new or existing player will need to come in at the edges and focus on specialization of one or more core sectors.

Behavior Health Sector

The U.S. behavioral health care software and services market size was valued at USD 1.1 billion in 2021 and is expected to expand at a compound annual growth rate (CAGR) of 12.12% from 2022 to 2030. The emerging technologies for behavioral health management, rising awareness regarding substance abuse, and expanding reimbursement coverage are contributing to market growth. Adoption of behavioral health care software by care providers is likely to improve the management of mental health issues and treatment prospects. The providers of behavioral health can adopt integrated EHRs for effective practice management and cost savings.

The subscription segment dominated the market with a share of over 60.0% in 2021. The segment is anticipated to register the highest CAGR over the forecast period.



The U.S. behavioral health EHR market size is expected to reach USD 459.1 million by 2030. It is expected to expand at a CAGR of 11.07% from 2022 to 2030. Electronic health records (EHR) software is extremely advantageous for behavioral care practices since it promotes communication among clinicians, hence avoiding unnecessary duplication of services. With clinical and financial consequences at stake, behavioral care practitioners are adopting health IT solutions such as EHR technology at a faster rate than that in previous years.

Software that combines both EHR and Practice Management are optimally designed to take advantage of this market segment and revenue growth potential. While a segment of this market is unattainable because it is hospitable based and will use a systemwide HER/Practice Management Software, the numbers are relatively low in comparison to other medical practices.

Mental health facilities are critically important for treating those with acute and chronic mental health disorders. In the U.S. outpatient facilities made up a majority of the facilities available with 4,941 such facilities in 2020. Psychiatric hospitals were much less prevalent across the U.S. that year with just 668 facilities in total.

Among the 45,000 psychiatrists, 106,000 psychologists, and 198,111 behavioral health therapists, only 1.0%, 1.3% and 1.2% were in practices of >that 20 providers or institutions.

This leaves extensive market opportunity for a combined practice management/EHT behavioral health software to capture market share by coming in from the edge.

Observations:

Conservatively the combined total addressable market for a combined practice management and EHR software for Behavioral Health is $512.6 million. HealthBiller market potential is as follows:

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Competitive Marketplace

There are general practice management and EHR softwares that can be used by the behavior health community. Behavioral health practices have more specialized needs for medical software then other types of practices. This means that our competitive focus will be on software dedicated to behavioral health and those that have demonstrated a strong development of that market segment.

This means the review of behavioral health software that provides the same benefits of general practitioners who use EHRs and practice management systems but incorporate mental health specific features and systems, for example:

- Specialized medical billing software that isn't bogged down with codes that do not apply to mental health. Instead, these systems are tailored with ICD-DSM coding to run faster and better assist users with ICD-10.
- Intake and evaluation forms that are customized to obtain the information you need to make behavioral health evaluations.
- Enhanced note taking abilities that document behavioral factors for mental health risk, violence, and suicide.

Competitors

The U.S. behavioral health care EHS/Practice Management software sector is highly competitive with over 30 competitors who are dedicated or feature various aspects of HealthBiller Software. To conduct our feature, competitive, and marketing analysis, we examined the following competitors.

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Foothold	footholdtechnology.com	Features	1.090M	363,532	35,943	10:11	85,743	15,918	91
Kareo	Kareo.com	Features	8.154 Million	2.718 Million	747,293	3.64	13,067	2,442	160
Luninello	Luminello.com	Dedicated	1.400M	466,840	69,204	6.75	90,119	17,177	98
Procentive (Therapy Brands)	Procentive.com	Dedicated	1.199M	399,899	28,913	13.83	112,564	20,027	123
SimplePractice	Simplepractice.com	Features	31.75M	10.58M	1.552M	6.82	869	N/A	N/A
Therapy Appointment	therapyappointment.com	Dedicated	3.737M	1.245M	213,202	5.84	38,506	6,987	35
TheraNest (Therapy Brands)	TheraNest.com	Dedicated	5.748M	1.916M	240,452	7.97	21,671	4,089	14
TherapyNotes	Therapynotes.com	Dedicated	12.29M	4.099M	281,847	14.55	16,832,297	2,044	6
Valant EHR Suite	Valant.io	Dedicated	2.601M	867,131	170,869	5.07	41,789	8,006	N/A
Therapy Brands	therapybrands.com	Dedicated	81,298	27,309	N/A	N/A	1,280,788	245,502	906
Therabill	Therabill.com	Dedicated	909,783	303,261	37,820	8.02	178,889	31,216	3,082
TheraPlatform	Theraplatform.com	Features	600,219	200,070	75,295	2.66	230,604	45,209	289
My Clients Plus	myclientplus.com	Features	543,286	181,095	26,738	6.77	204,467	35,849	N/A
CounSol.com	counsol.com	Dedicated	486,145	162,048	11,141	14.54	249,786	43,488	325
Behaviorsoft	behaviorsoft.com	Dedicated	330,788	110,263	7,014	15.72	331,174	57,721	N/A
Lightning Step	Lightningstep.com	Dedicated	310,175	103,392	6,965	14.85	341,908	59,707	N/A
Theralytics	Theralytics.net	Dedicated	212,808	70,936	17,811	3.98	421,823	74,101	N/A
Best Notes	bestnotes.com	Dedicated	199,051	66,350	24,854	2.67	615,503	127,857	1,009
Psyquel	Psyquel.com	Dedicated	80,155	26,718	9,924	2.69	793,416	142,432	15,733
AZZLY Rize	Azzly.com	Dedicated	78,163	26,054	>5,000	9.42	656,679	118,229	N/A
nTreatment	ntreatment.com	Dedicated	39,710	13,237	<5,000	2.86	1,504,658	282,037	N/A
Mercury Medical	mercuryhealthcare.com	Features	31,734	10,578	6,656	1.59	4,207,811	1,439,774	63,233
BehaveHealth	behavehealth.com	Dedicated	23,506	7,835	<5,000	2.02	2,448,004	521,692	N/A
Therasoft Online	Therasoft.com	Dedicated	15,695	5,232	<5,000	5.38	2,310,309	476,349	4,543
Exym	Exym.com	Featured	14,661	<5,000	<5,000	1.65	5,206,256	1,434,635	N/A
CAM EHR	EMRsystems.net/cam	Dedicated	12,325	<5,000	<5,000	1.49	4,558,961	1,529,977	N/A
EchoVantage	www.echobh.com	Dedicated	<5,000	<5,000	<5,000	1.4	6,717,737	1,956,000	N/A
PIMSY Mental Health EHR	Pimsyehr.com	Dedicated	<5,000	<5,000	<5,000	1.80	11,211,060	3,767,050	N/A

From the list we identified the top eleven companies that are receiving the most site visits for further analysis. Here is the breakdown of the top eleven companies we identified that have the greatest impact on the behavioral health market segment.

Company	URL	Behavioral Health Focus
HealthBiller	HealthBiller.com	X
ClinicSource	clinicsource.com	Features
Foothold	footholdtechnology.com	Features
Kareo	Kareo.com	Features
Luninello	Luminello.com	Dedicated
Procentive (Therapy Brands)	Procentive.com	Dedicated
SimplePractice	Simplepractice.com	Features
Therapy Appointment	therapyappointment.com	Dedicated
TheraNest (Therapy Brands)	TheraNest.com	Dedicated
TherapyNotes	Therapynotes.com	Dedicated
Valant EHR Suite	Valant.io	Dedicated
Therapy Brands	therapybrands.com	Dedicated

The takeaway is that outside of the top three, two of which are not dedicated to behavioral health, nobody is a predominate player. Only two of the companies have generated funding to accelerate their growth.

Special note Therapy Brands is the outlier in this analysis. They have been growing through a series of acquisitions including Procentive, TheraNest, and EchoVantage HER (not listed). All of their acquisitions are in the technology sector for mental, behavioral, and rehabilitative practices. In turn Therapy Brands was acquired in 2021 by a private equity firm, Kohlberg Kravis Roberts for $1.2 billion dollars.

If you look at the overall traffic to each site, it is apparent (despite recent efforts) that they operate each of their software acquisitions as separate business entities. Where it makes sense, we have included Therapy Brands as a separate listing in our analysis.

The complete analysis of feature set, position in the marketplace and marketing/sales performance will be covered in a separate section of this report.

Size/Funding

A look at the top eleven competitors provides some interesting facts. Only four companies have yearly revenues over ten million dollars ($10M). These are Kareo ($116.2M), SimplePractice ($65.1M), TherapyNotes ($36.2M), Valant EHR Suite ($10.8M) and Therapy Brands ($74.9M).

It is not surprising that Kareo and SimplePractice have significantly more revenue as they are not dedicated to the behavior health space but compete in a number of sectors. Therapy Brands includes 19 acquisitions of companies operating in the behavioral health sector.

TherapyNotes is the largest independent company dedicated to the behavioral health space with 134 employees and $36.2M in annual revenue.

Kareo, Valant EHR, and Therapy Brands are the only three of the top ten that have received any significant funding for growth.

Company	URL	Revenue. GrowJo.com	Number of Employees GrowJo.com	Employee Growth GrowJo.com	Total Funding GrowJo.com
HealthBiller	HealthBiller.com	X	3	X	X
ClinicSource	clinicsource.com	N/A	N/A	N/A	N/A
Foothold	footholdtechnology.com	$9.7M	74	0	N/A
Kareo	Kareo.com	$116.2M	631	-14%	$163.2M
Luninello	Luminello.com	$2.8M	17	N/A	N/A
Procentive (Therapy Bran	Procentive.com	$2.9M	29	0	N/A
SimplePractice	Simplepractice.com	65.1M	359	36%	N/A
Therapy Appointment	therapyappointment.com	$0.9M	10	N/A	N/A
TheraNest (Therapy Brand	TheraNest.com	$1.4M	16	-11%	N/A
TherapyNotes	Therapynotes.com	36.2M	134	0	N/A
Valant EHR Suite	Valant.io	$10.8M	77	0	$26.3M
Therapy Brands	therapybrands.com	$74.9M	421	13%	Acquired $1.2 B

Observations:

However, here is how they are users have rated the better adopted products by both customer satisfaction and usability.



One of the reasons that TherapyNotes has captured significant market share is that they are rated as one of the top EHR's for behavioral health in both customer satisfaction and usability. TherapyNotes highlights the following feature sets for $49/mo Solo Practice and $59/month/clinician group practice:

- Scheduling
- To-do Lists
- Notes and Electronic Records
- Electronic Billing
- ePrescribe
- Payment Processing
- Custom Client Portal
- Telehealth
- Enhanced Customer Support

Observations:

TherapyNotes is the most dominant independent competitor that is dedicated to behavioral health. They have over four million visitors each month that results in 36.2 million dollars in revenue each year. Having just one dominate player who is wholly dedicated to the behavioral health sector is highly positive. It will allow for on-page and performance SEO strategies to pull traffic and market share from them.

The marketing analysis that will follow will describe how HealthBiller can put itself in the position of being a dominate leader in the behavioral health sector.

Marketing

This Website and Competitive Analysis is well defined process that will allow HealthBiller to better understand the competitive factors that create marketing success (or failures) for both them and their competitors.

The Web Site Competitive Analysis is a study of the macro and micro factors that propel your buyer personas through the buyer's journey. This report while highly detailed represents only one-third of the discovery and assessment process that is necessary to fully develop a comprehensive marketing/sales plan. Simply put, this report will include an assessment of the strengths and weaknesses of current and potential competitors that will allow you to better understand and develop an offensive and defensive strategic plan to address both opportunities and threats.

To fully develop a comprehensive marketing/sales plan it is necessary to complete the Discovery and Assessment process. This requires that additional information must be generated through interviews of stakeholders, former clients, and lost (closed) opportunities. The additional reports that will be generated once this process is completed are:

- Strategic Buyers' Insight Report
- Buyer Persona Report
- Buyer Sentiments Report
- Event Marketing Strategies
- Sales Enablement Strategies

This Competitive Analysis report looks at quantitative and qualitative empirical data to formulate the scope and direction of the marketing initiatives. In every instance, we support our findings by sharing information learned from our discovery and assessment or from industry reports and standards.

Utilizing competitors identified through consultation with principals, potential investors and industry knowledge, we utilized over 50 third-party software tools to examined hundreds of data points provide the foundation of this report. If there are other more relevant competitors, these report needs to be redone to reflect their performance and information.

When appropriate, each chart is colored coded to identify the best and worst performers in that category:

- Green = Company performing at the highest standard
- Yellow = Only is applicable to HealthBiller and identifies areas that need improvement
- Orange = Only is applicable to HealthBiller and identifies areas that need substantial improvement
- Red = Company performing at the lowest standard

At the end of each section, there is a “Finding Sections” where we identify the problems impacting HealthBiller and a Recommendation Section which identifies the actions that need to be implemented.

Note: Because we did not have access to in-house information, there are both SaaS metrics and social media metrics that could not be ascertained that have or analyzed. There are sections dealing with these areas but until access is made available the information in these areas is incomplete.

Context

While HealthBiller has had only marginal success with about 20 active clients, they have not engaged in any substantive marketing or sales initiatives. Therefore, many of their numbers in this report will naturally appear significantly poor in contrast to their competitors. However, it does represent the starting point for their deployment of a comprehensive marketing and sales strategy.

It is incumbent HealthBiller growth plan be targeted to reach critical mass (profitability) as quickly as possible. Therefore, a significant amount of the marketing initiatives needs to be aimed at the bottom of the funnel Sales Qualified Leads (SQLs). There also needs to be strategy to leverage resellers and referral partners. Once the leads are introduced to HealthBiller it is incumbent that they become and main them as customers and eventually influencers and advocates for the brand.

This report is not only a snapshot of the current initiatives success but also forms the foundation for identifying the elements of a marketing plan that will ensure continued double-digit growth and success.

Whenever we provide a detailed competitive analysis to a client who is entering a market with a dominant competitor there is a tendency to try and duplicate whatever it is they are doing. The logic is they are number one so it must work. That is not necessarily be best strategy or utilization of resources.

Because they have such a dominant market position is exactly why this is such a bad idea. They brand and name recognition allows them the luxury of breaking some best practices and not suffering the consequences.

It also means that if you try to compete with them head on and do exactly what they are doing you will run into a juggernaut and be crushed. It is imperative that when a company is trying to gain market share, they implement a blue ocean marketing strategy where there are less obstacles for success. Picking and choosing the right techniques and where/when/how to battle will result in the acquisition of sales and market share. Doing exactly what the market leader is doing or even what ALL the competitors are doing simply means you will be in an ocean that is read due to the blood that has been spilled.

Avoid the impulse to simply duplicate the market leader. The takeaway that needs to be made is to understand where they are vulnerable and take advantage of those weaknesses.

Finally, we are often asked three critical questions about this analysis and would like to address them up front.

1) What doesn't this information look exactly like what I find on Google Analytics (GA)?

There are two reasons for this. First, every analytic tool build in their own protocols and bias. For example, the methodology that GA uses to determine time on site and return visits is different from the way other services makes that determination. Neither is wrong, just different.

That leads to the second answer, we do not have access to your GA and that of your competitors. By using a 3rd party service we can get as close as possible to the best information. The key is consistency. Any bias or methodology being used by an independent 3rd party source is applied across all companies. This ensures that the information is consistent, accurate, and actionable.

2) Why do you use many different sources to evaluate the same metric?

Each software has its own built in bias on how the information is acquired and presented. Looking at multiple data sources allows us the ability to weed out the outliers and ensure that the data is accurate.

3) Why do you both summarize the data in a chart then share pictures of the information it was pulled from?

Simply to help establish credibility about the data being provided.

What Is a Successful Program

In the case of a startup or early-stage company, what constitutes the initial success is achieving critical mass, where the revenue covers all the expenses. How quickly that can occur is dependent on several factors. The ones that you can control are product features set, engagement activity, and marketing spend. There is a direct correlation between the amount/type of activity and marketing spend to the speed and type of results.

The good news is that a marketing/sales program that is metric driven will ensure that the right activates are being engaged and funded. It allows for mid-course corrections and the ability to predict where you will be in a 3-6-9-month timeframe.

Programs should be tracking upward of 400 key performance indicators each month. These in and of themselves are not success metrics but the precursors to actual success metrics which are always predefined to be:

- Agreed upon number of licenses
- Agreed Upon monthly recurring (MRR) revenue
- Profitability Percentage
- Annual recuring revenue (ARR) amount

For HealthBiller first stage success means:

- 230-360 Licenses (depends on spend)
- MRR in excess of $73,667
- 30% Profitability
- ARR in excess of $884,000

Lead and Demand Generation

The first step for any successful company begins with generating interest or demand and driving traffic to their site to learn about your products.

For any SaaS company to be successful, you must be able to convert that demand into leads by capturing contact information that allows you to nurture them or place them into a sales funnel. Typically, this is accomplished by providing them a free trial or if they are not ready to make a bottom of the funnel action by capturing their contact information in exchange for information, they find extremely valuable.

Both demand and lead generation require a multi-discipline process that must combine science, art, and creativity. There is no one single activity that will be the magic bullet. It begins with locking down the fundamentals and then incorporating best practices to put forth a cross channel marketing program.

It then requires the collection and analysis of metrics that cover every aspect of the sales and marketing endeavors. Only through analysis will you be able to ascertain what is working and what needs to be modified or discarded.

This report is one of the foundational steps that begins to address those questions. Every metric impact both lead and demand generation.

At the end of this report an initial marketing plan is set forth. That marketing plan is subject to modification once the full discovery and assessment process is completed.

Website Performance Analysis

The following analysis will examine the affect these changes have had and serve as a baseline for further improvement. We start the analysis with the website as it is the epicenter of your online and offline marketing efforts. An optimized website is critical for both online and offline sales.

Two thirds of clients will check information about HealthBiller before considering whether to contact you. It is the focal point of your marketing that will explain who you are and offer your unique value proposition to the world. Your website and its ecosystem must be intuitive and the navigation seamless.

Before they will read the messaging on a website or landing page, they need to see that it scannable and resonates and provides the information they are seeking.

Eighty-one percent of clients conduct online research before they initiate contact, even when the actual interaction is offline in your office. The purpose of a website is to educate with the potential client and serve as their trusted advisor. It has been shown that clients are more likely to try SaaS services which originate from a website that is both easy to navigate and that provides quality content. Your website needs to be educating them on how you can help them be more productive or solve an ongoing problem. They need to be learning and obtaining information from your website rather than seeking information from a competitor's site (Adweek).

While the HealthBiller' website has many good features, it does not meet all the best practices. This will impact Google sending organic leads to the site and the likelihood that the visitor will engage once there. We took a deep dive into the website to see what is working and what elements may need to be optimized. Again, this is critical as poorly optimized website will cause a decrease in organic traffic and cause those who do find the site less likely to engage.

In my evaluation of the website, the following areas were considered:

- Website Technical Performance
- On-Page SEO
- UX/UI (User Experience/User Interface)
- Content
- Platforms Utilized
- Website Content
- Mobile and Tablet Performance

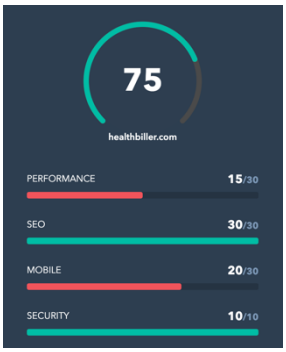
Website Review

Company	URL	Website Grader	WooRank	Site Analyzer	Page Insights Desktop Optimization	Speed Load Index	Time to Interact	Load Speed Score	Load Speed	Website Size
HealthBiller	HealthBiller.com	75%	59%	75.4%	92%	1.0 S	2.5 S	80%	3.17 S	1.5 MB
ClinicSource	clinicsource.com	72%	65%	75.4%	71%	2.3 S	3.9 S	64%	4.88 S	2.9 MB
Foothold	footholdtechnology.com	74%	79%	83.1%	79%	1.4 S	3.2 S	98%	115 MS	9.1 KB
Kareo	Kareo.com	67%	75%	69.5%	47%	2.2 S	7.5 S	62%	3.47 S	8.5 MB
Luninello	Luminello.com	72%	67%	78.5%	41%	3.1 S	7.1 S	63%	5.54 S	5.5 MB
Procentive (Therapy Brands)	Procentive.com	75%	70%	70.0%	67%	2.4 S	3.4 S	65%	2.23 S	2.8 MB
SimplePractice	Simplepractice.com	70%	78%	65.4%	36%	3.0 S	4.4 S	69%	3.84 S	2.7 MB
Therapy Appointment	therapyappointment.com	66%	66%	69.9%	94%	0.8 S	1.2 S	64%	2.78 S	2.5 MB
TheraNest (Therapy Brands)	TheraNest.com	82%	79%	81.7%	54%	1.8 S	4.4 S	65%	1.90 S	2.9 MB
TherapyNotes	Therapynotes.com	85%	68%	67.2%	98%	0.8 S	0.6 S	98%	470 MS	16.1 KB
Valant EHR Suite	Valant.io	97%	76%	81.2%	99%	1.0 S	1.3 S	86%	3.02 S	2.1 MB
Therapy Brands	therapybrands.com	72%	69%	87.1%	62%	1.6 S	3.8 S	64%	4.18 S	5.2 MB

Findings:

We used several different website tools to evaluate the overall performance of the websites. The reason is that all these third-party tools have their own biases and items that they focus.

- **Website Grader –** This is a HubSpot tool that looks at the overall site from an inbound marketing perspective. HealthBiller had a poor score of 75%. While a "C" may get your through college, it will cause your company to lose opportunities to higher ranking competitors.



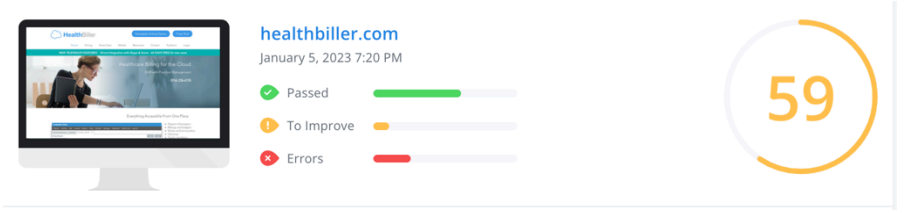
- Three competitors scored higher:

TheraNest	82%
TherapyNotes	85%
Valant EHR Suite	97%

- **WooRank –** This tool provides a better and more in-depth website analysis over a broad range of key performance indicators (KPIs) that will impact if you make it to the first page of Google search results. HealthBiller's website was tested using WooRank and it only scored a 59%. WooRank looks more toward the technical

aspects of a website is constructed and is more indicative on how Google and other search engines will evaluate the site.

- HealthBiller's website was the worse in class when compared to all 11 competitors. A 59% score means that there is a need for substantial improvement and the website is losing organic traffic from the search engines.



<u>A websites effectiveness will diminish over time if it is not monitored and improved based on 1) actual use by visitors, 2) on-page SEO, and adjustments made for changes in Google Algorithms.</u>

- WooRank ranked most of the competitors in the high 60's and mid 70's with the overall winner (TheraNest) scoring a rating of 79%. The takeaway from this is that the by optimizing your website, it will allow HealthBiller to be viewed more favorably by the search engines increasing your ability to obtain organic traffic and increase your market share.

Site Analyzer

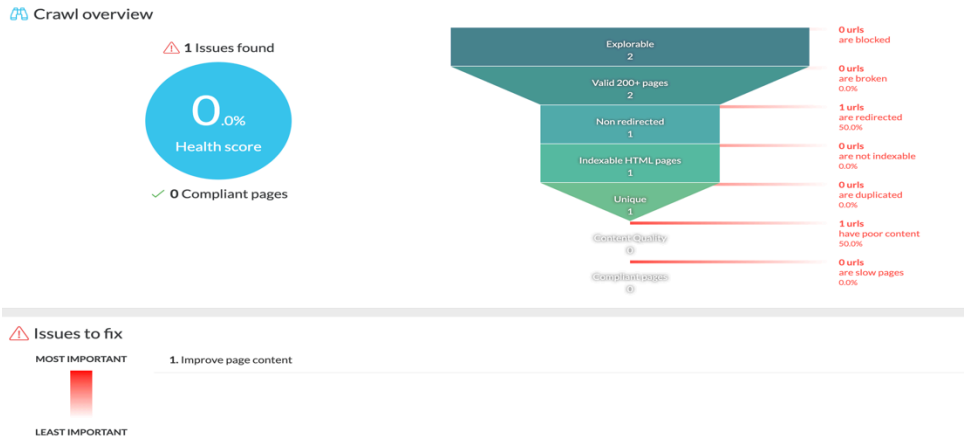
Site Analyzer analysis of a website focuses more on design, accessibility, and performance. HealthBiller's website had an overall ranking of 74.4%. While not at the bottom, HealthBiller was given an orange flag because of the number of critical issues (4) and performance warnings (12).



Therapy Brands website had the highest score with 87.1% followed by Foothold Technologies with 83.1%.

Website Health Analysis

We ran a more in-depth health score for HealthBiller's website and the result was that there was so little content that the performance tool rated the site's health as 0.0%.

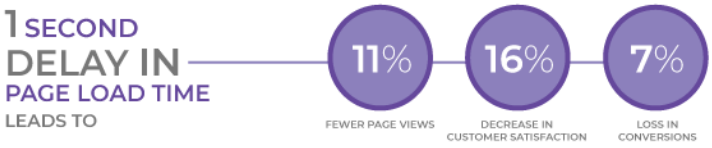


Recommendations:

1)_ Optimization of the website for on-page and performance SEO.
2) We recommend that a heat map be applied to the site so see how visitors are engaging and that on-page SEO be fine-tuned.
3) It is also imperative that HealthBiller develop better content that will enhance the performance SEO and draw organic traffic to the website. Implement a program to provide regular fresh content that is loved by both search engines and visitors.

- **Load Speed:**

A recent industry study has shown 83% of people expect a page to load within three seconds or less. For every additional 1 second delay beyond that time reduces customer satisfaction by 16%, page views by 11% and conversion rate by 7%.



What does this mean in practical terms for a website?

If you don't stick to the 3-second window, then you risk an abandonment rate of over 40%.

What does this mean in monetary terms?

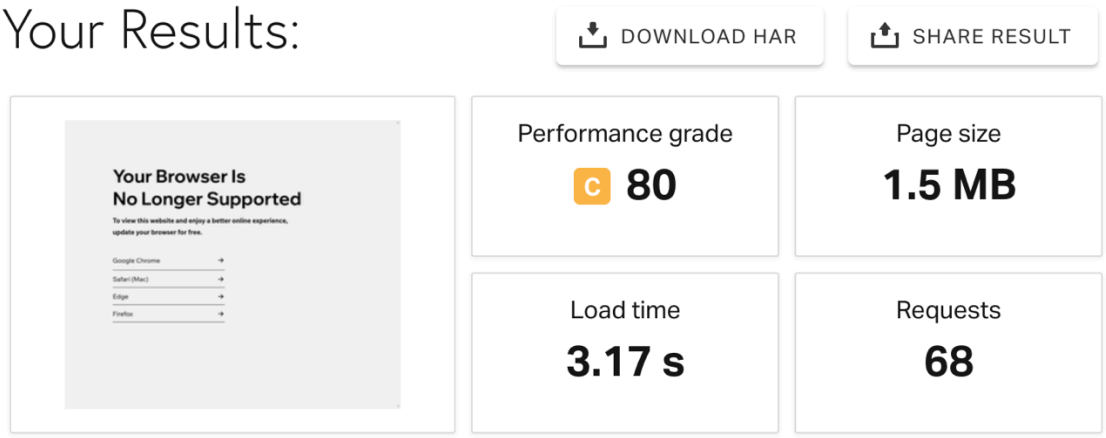
If a website is making $100,000 per day, just one second delay in the page load time could potentially result in $2.5 million loss in sales per year.



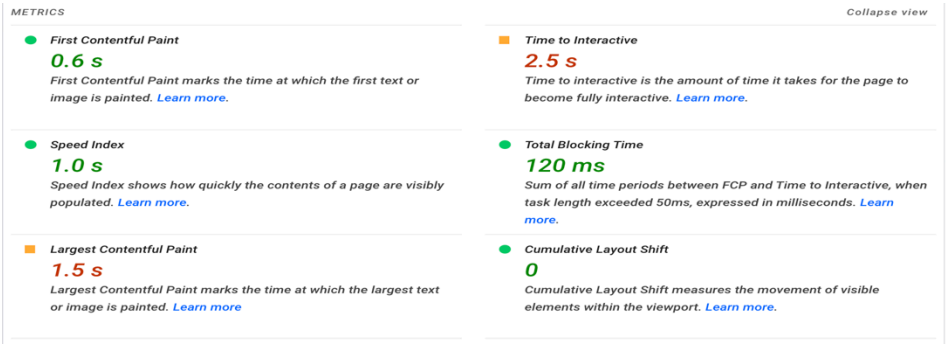
- The speed that it takes to load a website is dependent on many factors some of which are outside the control of the company. To help avoid errors caused by location or equipment, we analyze all companies using the same computer interface and at the same time. We also use several different testing services to see if there is consistency in the results.

- HealthBiller's website had a range of desktop load times from 2.5 seconds (Google) to 3.7seconds (Pingdom). While this may seem be within the acceptable norm, the fact that the website is only 1.5 MB means that this is exceedingly slow performance. They "payoff" with once the site loads will mean a high bounce rate and diminished organic traffic over time.

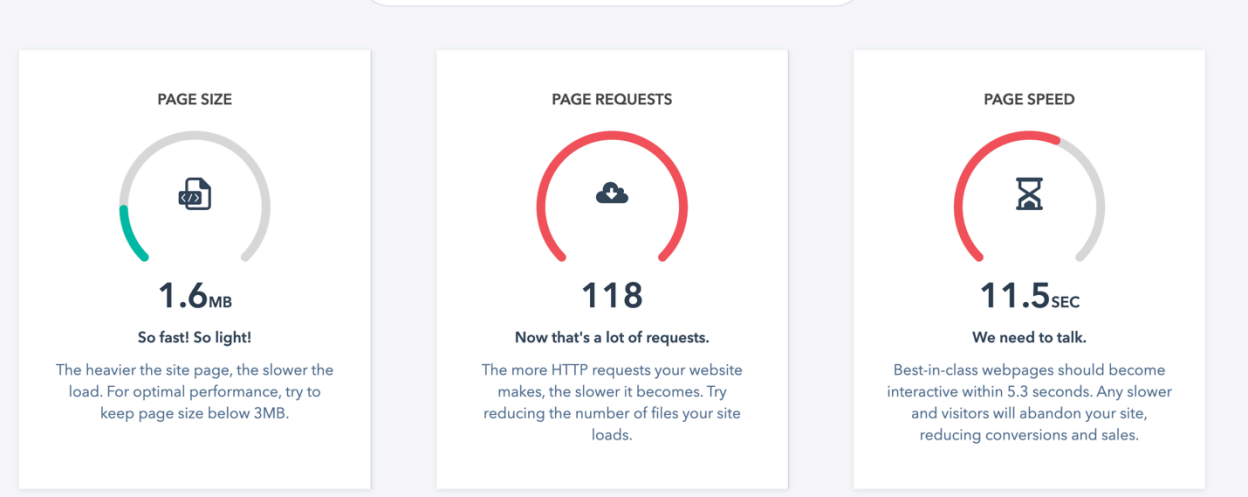
- There are several is technical errors that is impacting the load time. This time negatively impacts both user experience and obtaining organic traffic. Google penalizes sites with that slow load speed and light on content.



- A clear determination of how Google itself views the desktop website is that their own webmaster tools gave the current HealthBiller's website a negative score for the overall performance speed to load. The key takeaway here is that while the first meaningful paint is 1.5 seconds, the time it takes before a person can fully interact is 2.5 seconds. This means that there is significant room for improvement since the site is only 1.5 MB



- A final analysis and certainly more problematic is the speed test done using Website Grader which is the HubSpot website performance tool. The HubSpot performance test took 11.5 seconds for the website to fully load despite the website being light in content.



Recommendations:

A desktop website load speed that has under 6.0 MB of content should load below 1.5 seconds.

- The vast percent of HealthBiller's website traffic is through a desktop computer. This means that HealthBiller is incurring a substantial revenue loss due to the slow website load time.
- Utilizing the findings from the three speed load tools, make the necessary corrections to eliminate the poor load time.
- SEO - Google has indicated load time is one of the signals used by its algorithm to rank pages. And research has shown that Google might be specifically measuring time to first byte as when it considers page speed. In addition, a slow page speed means that search engines can crawl fewer pages using their allocated crawl budget, and this could negatively affect your indexation.
- User Experience – Load time is also important to user experience. Pages with a longer load time tend to have higher bounce rates and lower average time on page. Longer load times have also been shown to negatively affect conversion.

On-Page SEO

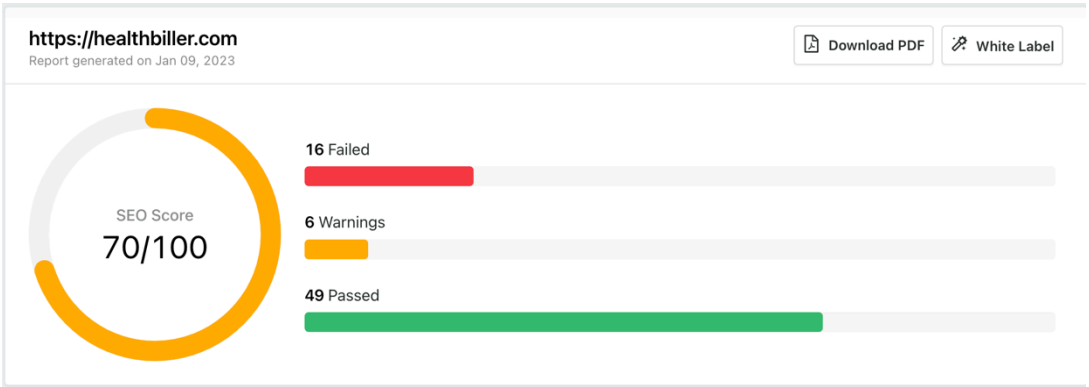
Company	URL	Site Analyzer On-Page SEO Score	SiteCheckup On-Page SEO Score	PageSpeed Insights On-Page SEO Score	SEO Critical	SEO Warnings	Broken Links
HealthBiller	HealthBiller.com	92.6%	70.0%	100%	16	6	17
ClinicSource	clinicsource.com	80.4%	83.0%	92%	11	5	17
Foothold	footholdtechnology.com	95.1%	76.0%	83%	12	3	0
Kareo	Kareo.com	63.5%	70.0%	75%	17	4	1
Luninello	Luminello.com	75.5%	84.0%	92%	9	5	12
Procentive (Therapy Brands)	Procentive.com	79.2%	82.0%	92%	9	3	2
SimplePractice	Simplepractice.com	68.4%	74.0%	90%	12	6	63
Therapy Appointment	therapyappointment.com	77.2%	80.0%	100%	11	4	3
TheraNest (Therapy Brands)	TheraNest.com	80.4%	79.0%	92%	10	5	13
TherapyNotes	Therapynotes.com	73.8%	88.0%	92%	9	1	5
Valant EHR Suite	Valant.io	95.1%	83.0%	83%	9	6	13
Therapy Brands	therapybrands.com	80.4%	74.0%	100%	11	5	10

On-Page SEO (as opposed to performance SEO) is one of those marketing components you simply must get right. Google is extremely upfront as to what is required but it often takes having a website evaluated by several different third-party tools to ensure that a website is fully optimized.

We scored the HealthBiller and their competitors' websites using Site Analyzer (SA) and SEO Checkup.

SA website gave HealthBiller an on-page SEO score 92.6% and SEO Checkup scored the site at 70% score with 16 critical errors. We also ran a more comprehensive report wish SEMRUSH for HealthBiller. The results showed a technical score of the reality is that on-page SEO should be locked in and the website should not have a ranking lower than 95%.





Some of the reasons that HealthBiller performed so poorly include:

SEO

- The most common keywords of this webpage are not distributed across the important HTML tags! Primary keywords should appear in title tag, meta description and heading tags to help Search Engines to properly identify the topic of this webpage.

- The website does not contain H1 headings! H1 headings help indicate the important topics of your page to search engines. While less important than good meta-titles and descriptions, H1 headings may still help define the topic of your page to search engines.

- This website is not using a custom 404 error page! Default 404 error pages result in a poor experience - it can mislead users into thinking an entire site is down or broken, greatly increases the chance they leave the website entirely, and looks unprofessional. We recommend having a custom 404 error page to improve the website's user experience by letting users know that only a specific page is missing/broken (and not the entire site), providing them helpful links, the opportunity to report bugs, and potentially track the source of broken links

- This webpage doesn't take the advantages of HTML Microdata or JSON-LD specifications to use structured data!

- This website is not using CSS media queries. We recommend the use of this technique to implement responsive design functionalities

- This webpage is not serving images in a modern format! Image formats like JPEG 2000, JPEG XR, and WebP often provide better compression than PNG or JPEG, which means faster downloads and less data consumption.

- This webpage is not connected with social media using the API's provided by Facebook, Google +, Twitter, Pinterest, or using addthis.com

- The size of this webpage's HTML is **116.18 Kb**, and is greater than the average size of **33 Kb**! This can lead to slower loading times, lost visitors, and decreased revenue. Good steps to reduce HTML size include: using HTML compression, CSS layouts, external style sheets, and moving javascript to external files.

- Not all image display dimensions match the natural aspect ratio! Fix aspect ratio issues to avoid distorted images on this website!

- The Document Object Model (DOM) of this webpage has **2,441 nodes** which is greater than the recommended value of 1,500 nodes! A large DOM size negatively affects site performance and increases the page load time.

- Performance

- Speed up slow pages.

Security

- Remove insecure meta tags.

HTML Tags

- Add analytics tags.

Audit Crawler Report

- Fix crawler errors.

OTHER

- Keyword Usage
- Failure to follow AMP protocol
- No mobile frameworks detected
- Headers are not properly set to us HSTS
- Need to add internal links for improved UX/UI
- HealthBiller website is not optimized for voice searches

Broken Links

Site Checker: Free Broken Link Tool

http://www.HealthBiller.com

Check whole website Check single webpage check

http://www.HealthBiller.com
100% scanned - 267/267 URLs checked, 250 OK, 17 failed
Scan completed with 17 errors. Full report Retry dead links

- Check multiple sites at the same time - free - login or sign up for a free account.
- Check sites automatically on a regular basis with the Auto-Checker - see options.

Status	URL	Source link text
-1 Invalid URL	https://siteassets.parastorage.com/pages/pages/thunderbolt?appDefinitionIdToSiteRevision={"13d21c63-b5ec-5912-8397-c3a5	link/href
-1 Invalid URL	https://siteassets.parastorage.com/pages/pages/thunderbolt?appDefinitionIdToSiteRevision={"13d21c63-b5ec-5912-8397-c3a5	link/href
-1 Invalid URL	https://siteassets.parastorage.com/pages/pages/thunderbolt?appDefinitionIdToSiteRevision={"13d21c63-b5ec-5912-8397-c3a5	link/href
-1 Invalid URL	https://siteassets.parastorage.com/pages/pages/thunderbolt?appDefinitionIdToSiteRevision={"13d21c63-b5ec-5912-8397-c3a5	link/href
-1 Invalid URL	https://siteassets.parastorage.com/pages/pages/thunderbolt?appDefinitionIdToSiteRevision={"13d21c63-b5ec-5912-8397-c3a5	link/href
-1 Invalid URL	https://siteassets.parastorage.com/pages/pages/thunderbolt?appDefinitionIdToSiteRevision={"13d21c63-b5ec-5912-8397-c3a5	link/href
-1 Invalid URL	https://siteassets.parastorage.com/pages/pages/thunderbolt?appDefinitionIdToSiteRevision={"13d21c63-b5ec-5912-8397-c3a5	link/href
404 Not Found	https://play.google.com/store/apps/details?id=com.altapoint.phone	<No Text>
-1 Invalid URL	https://siteassets.parastorage.com/pages/pages/thunderbolt?appDefinitionIdToSiteRevision={"13d21c63-b5ec-5912-8397-c3a5	link/href
-1 Invalid URL	https://siteassets.parastorage.com/pages/pages/thunderbolt?appDefinitionIdToSiteRevision={"13d21c63-b5ec-5912-8397-c3a5	link/href
-1 Invalid URL	https://siteassets.parastorage.com/pages/pages/thunderbolt?appDefinitionIdToSiteRevision={"13d21c63-b5ec-5912-8397-c3a5	link/href
-1 Invalid URL	https://siteassets.parastorage.com/pages/pages/thunderbolt?appDefinitionIdToSiteRevision={"13d21c63-b5ec-5912-8397-c3a5	link/href
404 Not Found	https://apps.apple.com/us/app/altapoint-mobile/id1070643259?ls=1	[301 from https://itunes.apple.com/us/ap
-1 Invalid URL	https://siteassets.parastorage.com/pages/pages/thunderbolt?appDefinitionIdToSiteRevision={"13d21c63-b5ec-5912-8397-c3a5	link/href
-1 Invalid URL	https://siteassets.parastorage.com/pages/pages/thunderbolt?appDefinitionIdToSiteRevision={"13d21c63-b5ec-5912-8397-c3a5	link/href
-1 Invalid URL	https://siteassets.parastorage.com/pages/pages/thunderbolt?appDefinitionIdToSiteRevision={"13d21c63-b5ec-5912-8397-c3a5	link/href
-1 Invalid URL	https://siteassets.parastorage.com/pages/pages/thunderbolt?appDefinitionIdToSiteRevision={"13d21c63-b5ec-5912-8397-c3a5	link/href

Recommendations:

All three On-Page SEO tools take a slightly different view on the importance on how Google algorithms factor in each element. The first step is to correct the 16 critical errors that have been found. This should improve your on-page SEO score to the low 90th percentile. After that simply take each identified technical issue and make the required improvements.

UX/UI Performance

Company	URL	Site Analyzer Accessibility Score	Site Analyzer Design Score	UX/UI Score
HealthBiller	HealthBiller.com	78.1%	63.8%	30%
ClinicSource	clinicsource.com	74.8%	55.7%	40%
Foothold	footholdtechnology.com	76.6%	78.3%	80%
Kareo	Kareo.com	66.4%	71.0%	90%
Luninello	Luminello.com	79.7%	65.2%	90%
Procentive (Therapy Brands)	Procentive.com	86.8%	62.0%	70%
SimplePractice	Simplepractice.com	66.4%	78.3%	96%
Therapy Appointment	therapyappointment.com	70.7%	49.4%	80%
TheraNest (Therapy Brands)	TheraNest.com	86.8%	78.3%	80%
TherapyNotes	Therapynotes.com	72.5%	74.6%	85%
Valant EHR Suite	Valant.io	79.7%	71.0%	90%
Therapy Brands	therapybrands.com	100.0%	78.3%	93%

While not the worst in class, HealthBiller scored poorly by Site Analyzer for both Accessibility and Design. Site Analyzer has proven to be a good indicator of how Google search engine will see your website. This means that HealthBiller will not have a high Search Engine Results Page (SERP) and will receive less organic traffic then their competitors who have a higher accessibility and design score.

UX refers to the **USER EXPERIENCE** and UI refers to the **USER INTERFACE**. The two need to be optimized so that the overall experience ensures that the visitor can easily find the information as they interact with a website. When you design a webpage that's centered on UX/UI, you create a space that's easy for the reader to access, understand, and navigate. Some concepts that involve a user's experience include:

- The process they go through to discover your company's unique value proposition
- Determine if a process or procedure is applicable to them
- The sequence of actions they take as they interact with the interface
- The thoughts that arise as they try to accomplish their task
- The impressions they take away from the interaction as a whole

Why Does UI/UX Matter?

Consider the following statistics:

- More than 65% of people prefer to read a UX-optimized site over a plain webpage.
- In the same study, nearly 40% of people exit websites that load slowly.
- Doing something as simple as incorporating a more popular color can boost your revenue.
- It's essential to make your site responsive. The amount of mobile traffic grows every year and is even expected to be half of global connections in 2020.

It is obvious that a website that is optimized for UX/UI will present an enjoyable experience for the web visitor allowing them to find what they are looking for and will result in them staying on the site longer. Small details such as the font, wording, and graphics are all visually compelling, and create a cohesive interface that will attract users and increase traffic.

UX/UI is also important for obtaining organic traffic. Google algorithms will reward sites that allow the visitor to easily find what they are looking for and where navigation is intuitive. UX/UI is comprised of many items including:

- Findability
- Navigation
- Load Speed
- User Interface
- Internal Linking
- External Linking
- SEO

HealthBiller has an UX/UI score of 30%, which ranks them at the very bottom of the evaluated competitors, there is significant room for improvement that will not only improve organic traffic but ensure that the visitor stays on the website long enough to learn and understand the value proposition of HealthBiller.

Some of the reasons include

- Failure to optimize the header
- On-page SEO is not optimized
- Lack of searchable/meaningful content
- Non-existent blogging Practices
- Testimonial module does not exist
- Third-Party verification module does not exist

- Poor use of social proof (influencers and earned media)
- Failure to offer a piece of gated content to capture new leads
- Lack of new (blog) content on home page
- Not Scannable
- Readability is poor
- Needs industry specific module
- Poor load time
- Not Mobile Optimized
- Backlinks to site lack in quantity and quality
- Social reach is poor
- Overall web traffic is low
- Lack of Social Links
- Improper use of forms
- Limited use of video

Recommendations:

The current HealthBiller website looks like it was designed in the 1990's and does not conform with best marketing practices for UX/UI. The failure to conform to these standards hurt both the opportunity to earn organic traffic and to satisfy the visitor if they do happen upon the website. I recommend a total redesign of the website. Once completed a heat map on the website should be added to see how visitors are navigating the website. This will allow us to perform A/B testing and to ascertain what elements need to be further enhanced.

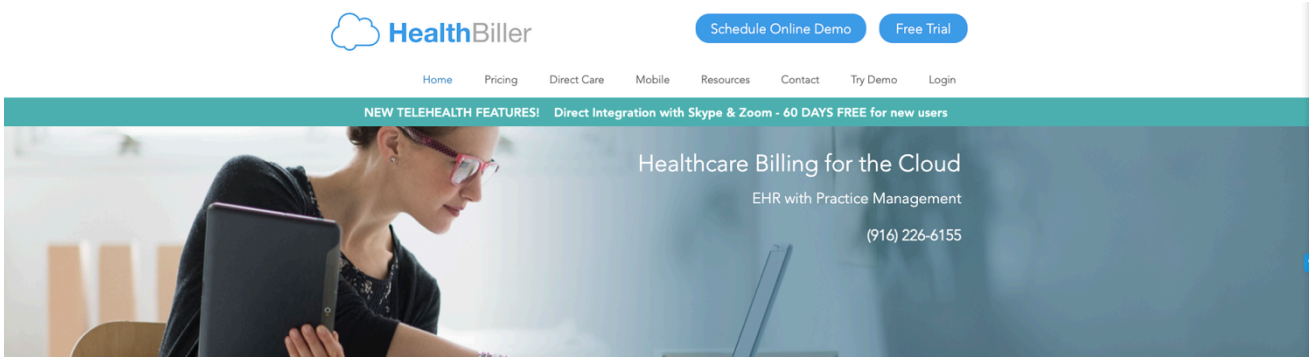
The following is a detailed review some of the items that need to be fixed. **These are in addition to the On-Page SEO and Load Page problems that were discussed in a previous section.**

The items below have not been listed per priority but simply based upon a review of each page.

UX/UI Considerations

The process of creating the appropriate UX/UI is ONLY done after a complete discovery and assessment process that involves discussions with company stakeholders, past clients, and if possible lost closed opportunities. However, without interceding into that process, I do want to provide some general oversight as to some problematic issues with the current HEALTHBILLER's website that will need to be addressed and corrected.

Header



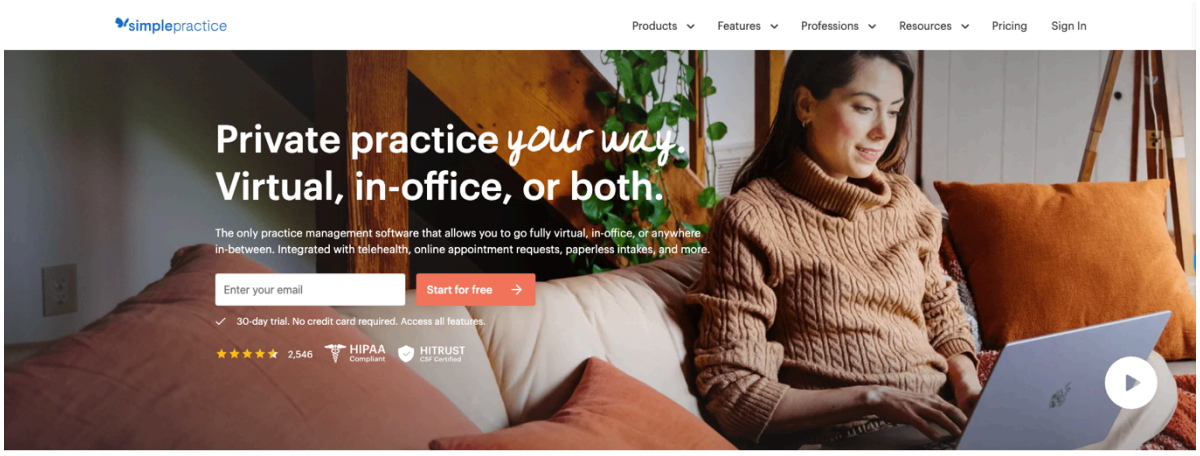
This is the most valuable real estate on the entire website. It must attract and compel the visitor to act. Most visitors will not navigate any further into the website unless the header:

- Captures their attention
- Confirms that they are on a website that can address their concerns and problems.

The HealthBiller header does not contain the following elements which severely impacts the sites performance:

- A compelling image that does not distract from the messaging
- A Bold Statement of Purpose
- A Call to Action that allows the visitor to try the product for free.

Here is an example from your listed competitors:



It does fail to provide a secondary call to action for those who are not yet ready to try the product

- A Secondary Call to action that allow the targeted persona to offer an extremely valuable piece of contact in exchange for their name and email.

Secondary CTA

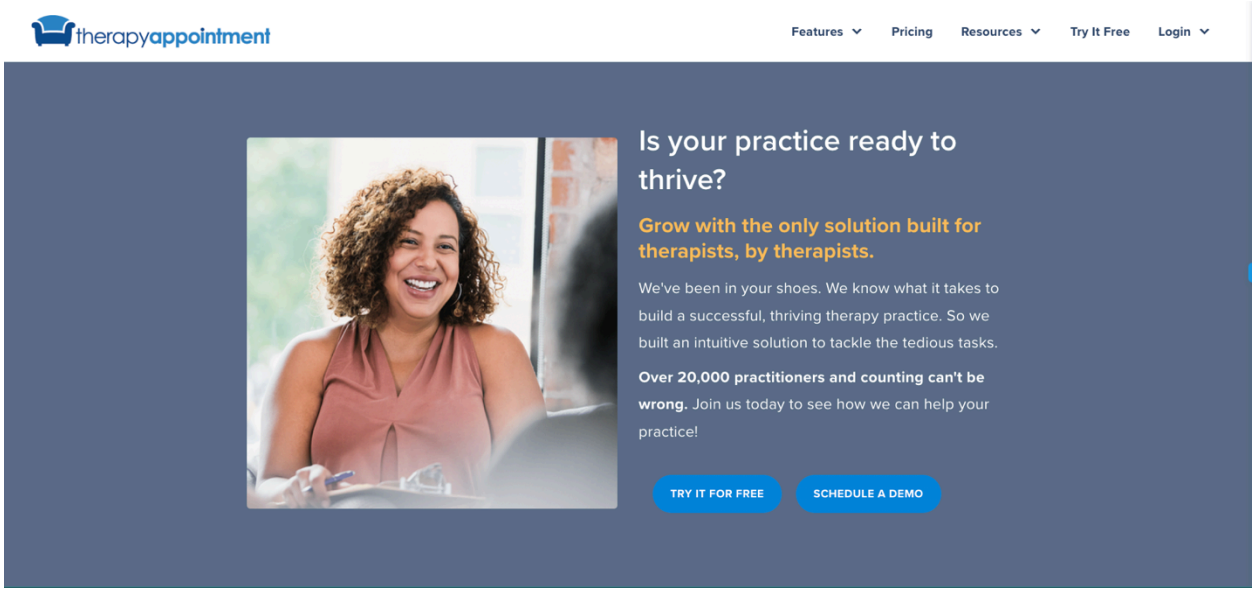
The reality is that 92% of ALL first-time website visitors will NOT click on a bottom of the funnel CTA ("get in touch") during their initial visit. (Inc. Magazine). They are simply trying to determine if you can answer their questions, solve their problems, or see whether they can trust you.

The reality is they may investigate dozens of different alternatives before they are ready to make create a trial account. You cannot afford to let them leave without either creating a free trial or leaving their contact information so you can follow up and nurture the lead.

Having a secondary CTA for a compelling piece of content will allow you to capture this information if they are not ready to start a free trial.

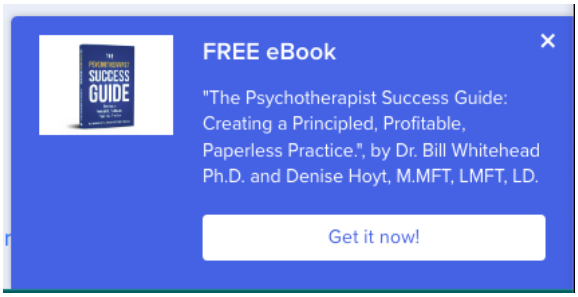
The secondary CTA also needs to be in the header and offer the visitor the opportunity to download a piece of content that is highly relevant and informative in exchange for their email address.

Here is an example from your listed competitors:



Once a prospect lands on your website, you need to take steps to ensure that they become registered as a lead. To accomplish this, you need to have a resource that they believe is so valuable that they will exchange their basic contact information to acquire.

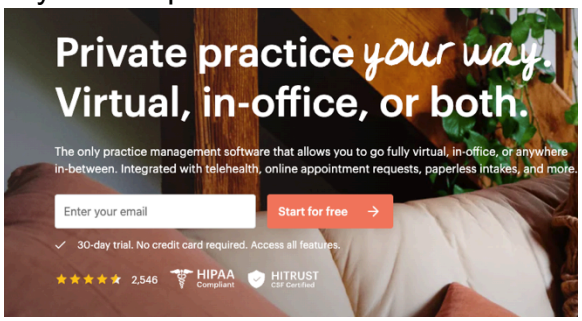
Here is an example of a call to action (CTA) from Therapy Appointment:

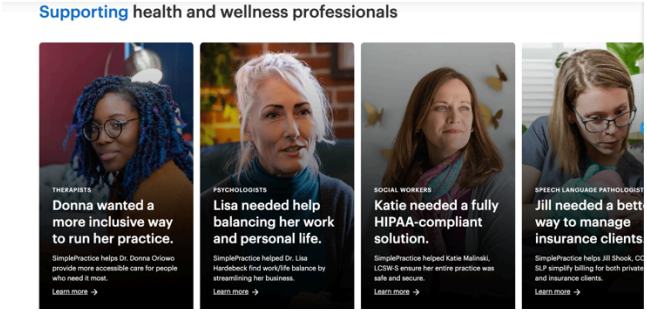


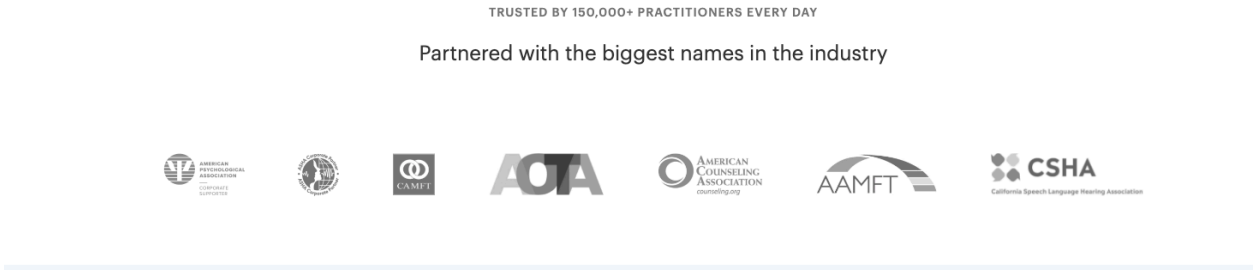
Testimonials

The HealthBiller home page does have a testimonial module, nor does it provide any third-party verification modules both impart the trust of the organization providing the testimonial and verification. Any visitor should be able as they are scrolling down the website understand and appreciate that HealthBiller has three to five testimonials from quality organizations and that independent third parties have recommended them.

Here are several examples of home page testimonials and third-party verifications from your competitors' websites:







Each of these examples allow the website visitor (while scanning) to understand that real people and organizations have had a great experience with their products.

There are many ways a business can display customer testimonials — And when determining the best approach for your business it's important to keep in mind that different formats and mediums can have varying effects on your target audience. You'll want to use a format that's viewable for your potential leads and aligns closely with their values.

Testimonials that include either a picture or a video of the client are proven to be more effective than those that are without. In addition, one sentence testimonials are often viewed to be superficial and do not transfer trust that is sought.

There should be a minimum of three and ideally five. Influencer marketing is a critical component that is relied upon by prospective clients

People by nature are skeptical creatures, which you need to overcome their concern and convince them to contact your office. So, if we know that people take shortcuts even when making complex and very business decisions.

Why is it so important to include testimonials on your website?

92% of consumers read online reviews, and on top of that 68% agree that reading positive customer reviews build their trust for a business. It takes advantage of one of the keys scientifically based factors that influence buying behavior. These factors were tested and proven by Dr. Robert Cialdini and can be found in his book C *Influence*. The principle that is applicable here is Consensus. We do not have the time to evaluate all the choices available when researching a product (especially with the internet). Therefore, when we are uncertain, we look to the actions, behaviors, and choices of others to help make that buying decision.

While there are trillions of reviews-based websites online, but not everyone has the time and resources to seek them out before making their decision to buy. Sharing your best customer reviews on your own official website not only lets you put your best foot forward, but it also makes it easy for visitors to find out about real-life experiences

A good testimonial has the following attributes:

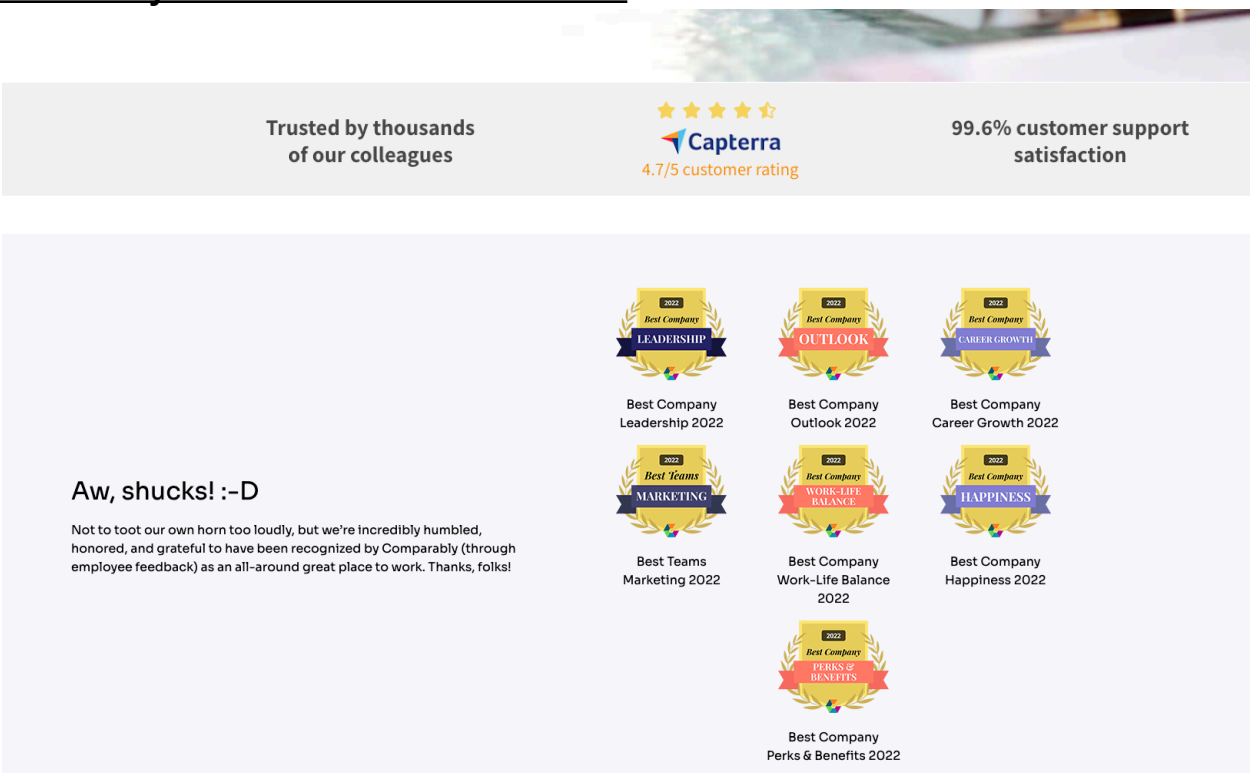
- Discusses the benefits of the product
- Substantiates your product claims
- Is from someone your audience can relate
- Is credible

Testimonials are an extremely important part of the success of your business. On your relationship-building journey, which is lined with credibility and expertise, testimonials from loyal customers are a critical part of the presence of your business

Influencer (Testimonial) Marketing Recommendations:

You need to add a module that incorporates testimonials and social sharing. These are critical components of any influencer marketing program. Three testimonials are the bare minimum any site should have. Curate the testimonials into different market segments. They should be properly labeled and placed immediately after the value proposition they support. Have a minimum of three to five testimonials for each market segment and add pictures and videos if the client consents.

Third Party Authorities and Earned Media



HealthBiller does not have a module that provides any third-party authorit. The place to have a third-party authority and earned media is not in the second module where the person is still trying to ascertain who you are and can you help them.

Here are several examples of home page testimonials that more in line with best practices.



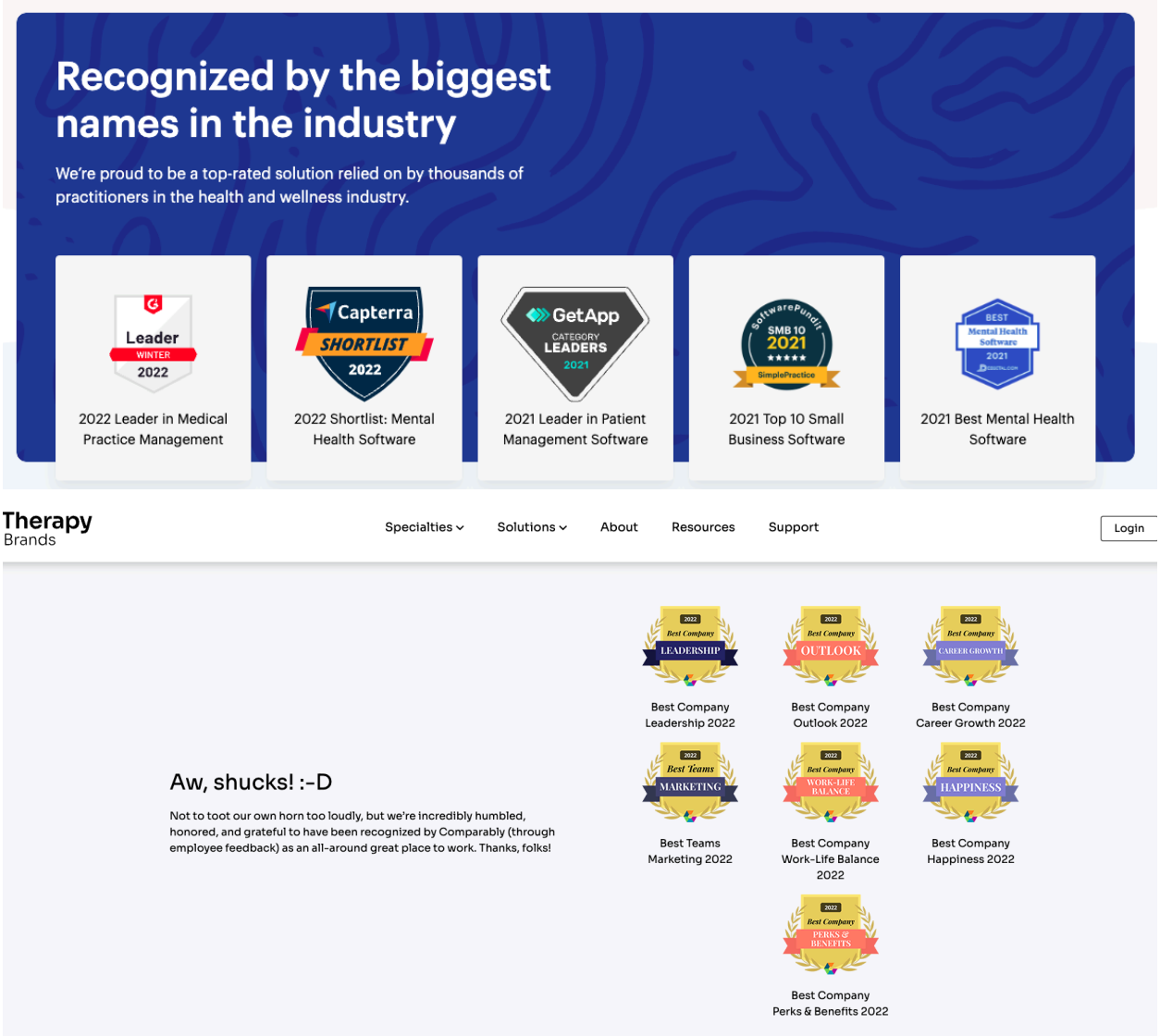


Prospective Clients will believe more what seemingly independent third parties have to say about HealthBiller than what you say about yourself. Even if it is an article that was generated by earned media.

Recommendations:

Add a module that makes it clear which 3rd party authorities that HealthBiller is aligned. If you don't have any third-party verification authorities, get them. When you add this module, the logos used to identify the support should be a live link that takes the person to an interior page that incorporates any third-party recognition and earned media accolades. These are critical components of any influencer marketing program
An example of this is:

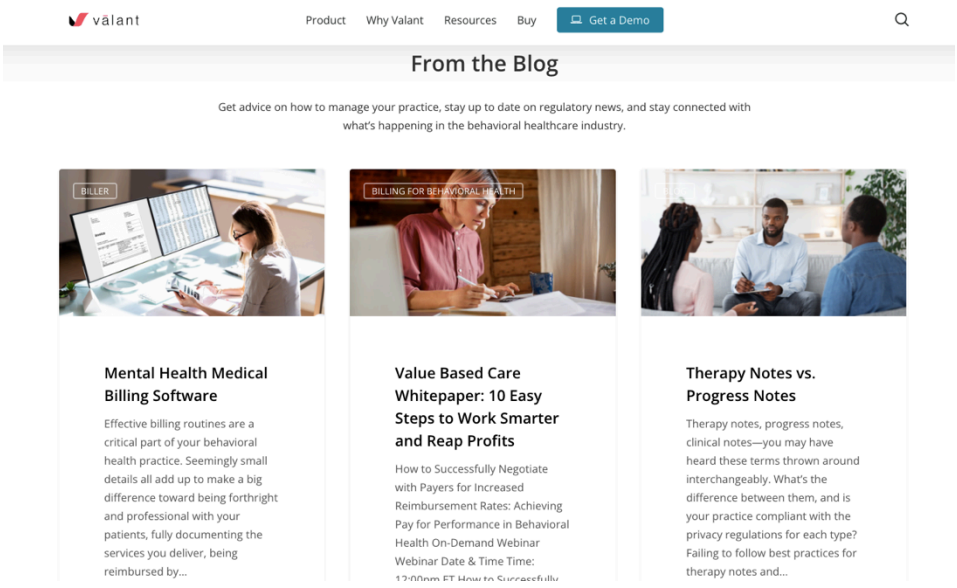


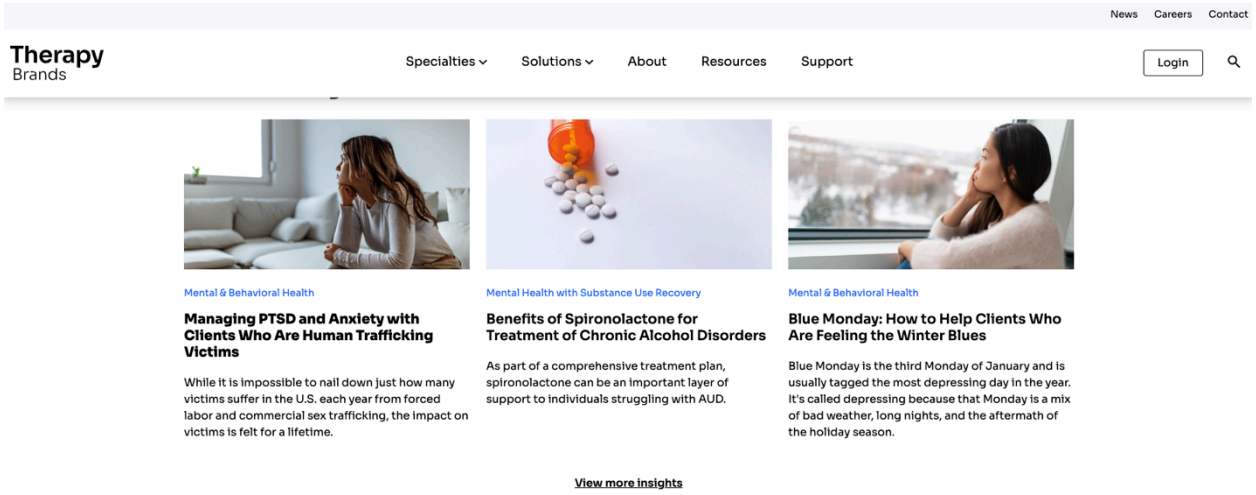


Blogs

Google and other search engines reward fresh original content. We will discuss optimal blogging in another section. Not only doesn't HealthBiller have an active blog, there this no content on the homepage. To obtain performance SEO, there is a needs to be new blog content is reflected on your home page.

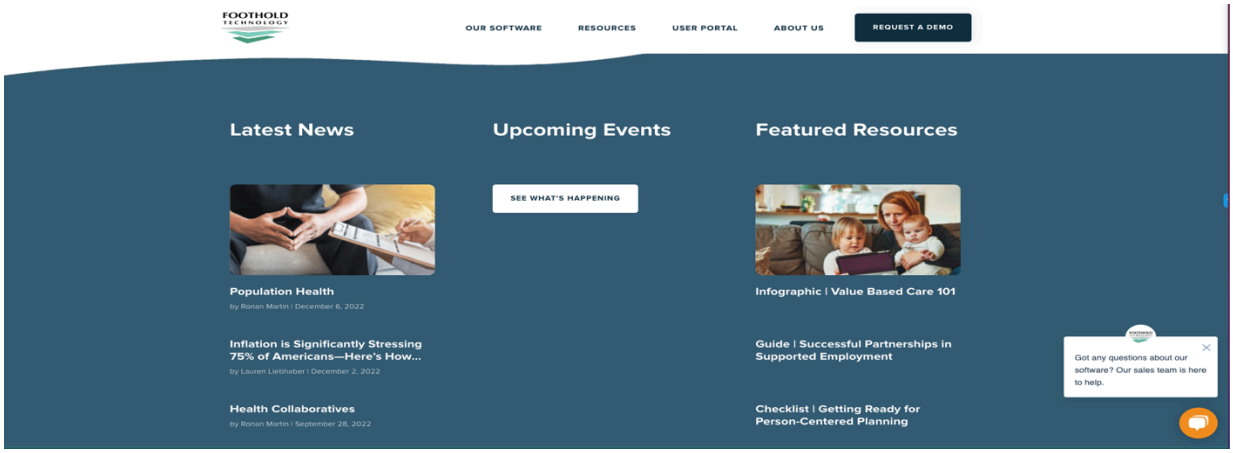
While all the listed competitors have a link to their blog on the homepage, five of them include the most recent blog summary on their homepage.





HealthBiller does not have a link much less a module that showcases new blogs and provides fresh new content to their home page.

The problem with most websites is that much of the information is static and eventually they will get penalized for being so. One way to keep Google sending organic traffic to your website and having people engage once they arrive is to add new blogs to your home page.



Blog Recommendations:

Provide a clear entry point on your home page that will showcase interesting content with pictures and text. Add a blog feed on your home page.

The appropriate protocol for blogging practices will be discussed in the Performance SEO/Demand Generation section. However, it is important to note that an aggressive blogging program needs to be adopted that ensures 15 or more new blogs are created and shared each month.

Explainer Module(s)

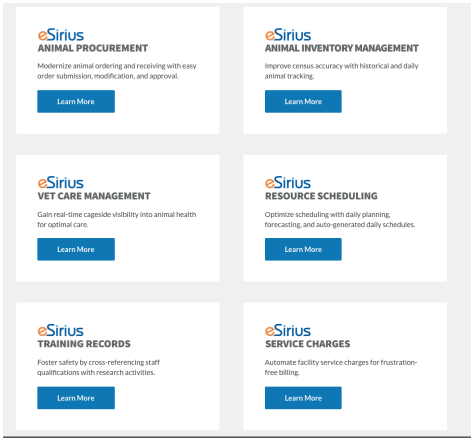
Since 92% of ALL first-time website visitors are trying to ascertain if you can solve their problems and concerns, it is critical that you provide a clear path to educate them. (Inc. Magazine).

A well-established UX/UI practice to solve this need is to have the second module of your website provide information on how you can help them. This can be done in one of two formats either by providing a brief description of your services or brief descriptions of solutions to their problems. While these may seem identical, they simple are providing the same information from different perspectives.

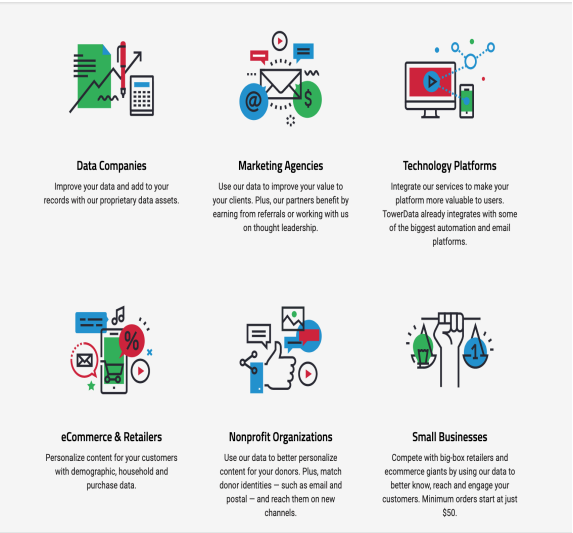
Several rules should be followed here:

- The presentation is in clear segmented sections that will through parallax functionality show the user they can be clicked on to bring them to a more detailed interior page.
- The Home page needs to address both the service offerings and the problem solutions (address from both perspective). So, whichever one is not addressed in the second module, it is found in a module further down the page.

By Services



By Industry



Explainer Module Recommendations:

HealthBiller needs to utilize both formats in presenting how they can help their prospective clients. The second module needs to include clear concise summary of how you can help and then show (through words and parallax functionality) that they can drill down to an interior page that provides more detailed information.

A secondary module needs to present the information from the alternative perspective. If a service-based approach is used in module two than a solution based approach is then done in module five.

Social Media

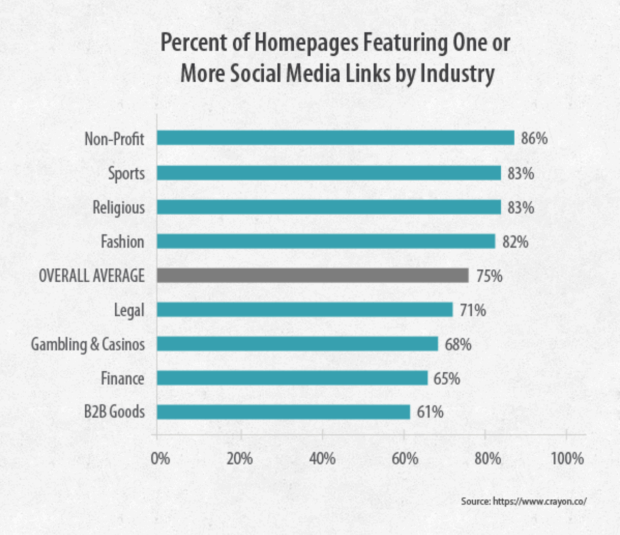


Social Proof is a critical part of influencer marketing. Ideally, the home page needs to showcase social media feeds. It's become increasingly clear that if you're not tapping into social media you are going to be severely limiting social proof.

Don’t believe the hype? Fair enough, but the numbers don’t lie as social media remains a potential goldmine for budding website brands. For starters:

- Brands with smart social sharing on their websites are six times more likely to secure a purchase: if you want customers to open their wallets, it’s crucial that they open to *you* in their social feeds and that you share and make them feel a part of your brand.
- The classic statistic that 74% of buying decisions are influenced by social media can’t be overstated: the more positive interactions you have with potential customers, the better.
- Businesses that focus on social networks build a stronger customer culture: in other words, it’s possible for customers to evangelize *you* versus constantly trying to track them down

For B2B, it is certainly more difficult to cultivate social proof, in fact if you have not been actively building the channels, it might be necessary to leave that module off till you create a social media presence.



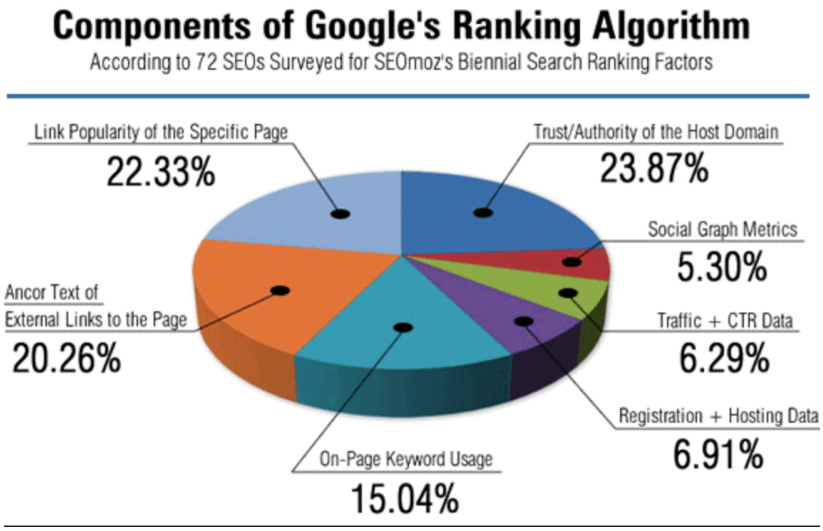
Social icons are a critical component of your website. Over 61% of B2B websites incorporate them. It is important to remember that when users click on a social media button, they are going to leave your site and unless they're going to do something with your content, it is counterproductive to have social links at the top of the page. You spent a lot of time and effort to get them to your site, don’t immediately send them away. Minimize user loss by choosing your social media placement carefully and keeping social media pages freshly updated and monitored.

Also, make sure that your social media platforms are done right and contribute to the overall marketing effort. This takes time and talent and should be done right.

Social Media Recommendations:

HealthBiller does not have social icons for Twitter, YouTube, Facebook, Instagram, or LinkedIn in their footer. Later sections of this analysis will discuss the importance of having a cross-channel social media program. Google algorithms place a great deal of importance on social listening and interaction. HealthBiller needs to add both LinkedIn and Instagram and fully utilize all social media channels.

Internal Linking Performance



External Linking: When one site links to another, it passes along “link juice,” or a little bit of that first site’s trust factor. The more external pages linking to a page on your website, the more valuable it becomes in the eyes of the search engines (that’s why a strong link building strategy is so important). Google will reward the website when it provides the web visitor with a link to a site that has highly valuable information. It is critical that that site have higher juice (Domain Authority) and when you click through it opens a new window and not actually take you away from the site.

Internal Linking: pages of a website can also pass some of their link juice along to another internal page. For instance, when you put a link on your homepage to a product page, your homepage is lending some of its search engine trust factor to that product page. This helps build the authority of some of the deeper pages on your site that might not receive as many external links.

Company	URL	Total Links	External Links	Internal Links	No Follow Links	Follow Links
HealthBiller	HealthBiller.com	18	5	13	0	18
ClinicSource	clinicsource.com	61	4	57	0	61
Foothold	footholdtechnology.com	112	8	103	0	112
Kareo	Kareo.com	499	54	445	0	499
Luninello	Luminello.com	147	12	135	0	147
Procentive	Procentive.com	48	8	40	0	48
SimplePractice	Simplepractice.com	284	14	270	0	284
Theraphy Appointment	therapyappointment.com	77	15	62	0	77
TheraNest	TheraNest.com	68	17	51	0	68
TherapyNotes	Therapynotes.com	N/A	N/A	N/A	N/A	N/A
Valant EHR Suite	Valant.io	214	4	210	0	214

View link data for:

healthbiller.com (root domain)

Research another site in Link Explorer

Export PDF

Spam Score Breakdown

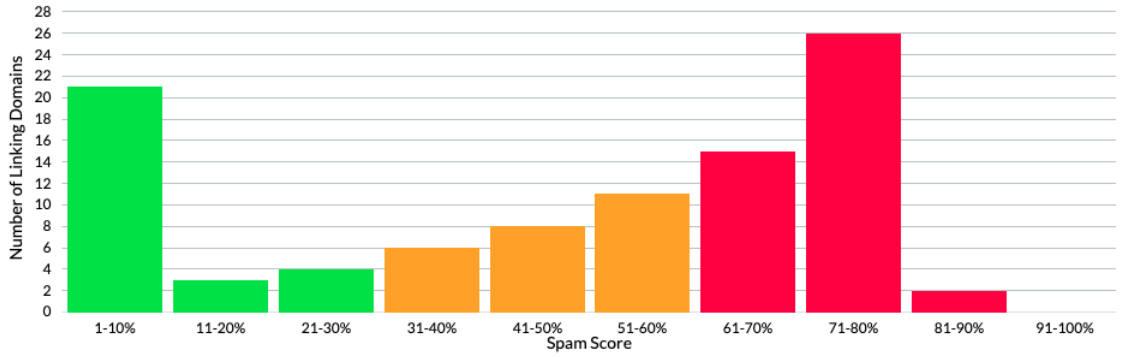
Percent of Linking Domains with a Spam Score of:

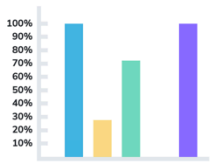
1-30%	29.2%
31-60%	26.0%
61-100%	44.8%

Linking Domains 99

Domain Authority 11

Spam Score 2 %





Total Links:	18
External Links:	5
Internal Links:	13
No Follow:	0
Do Follow:	18

Internal Links (Total Links: 13)

Sr#	URLs	Links Anchor Text	Type	No/Do Follow
1	https://www.healthbiller.com/book-online	Schedule Online Demo	Text	Do Follow
2	https://www.healthbiller.com	Home	Text	Do Follow
3	https://www.healthbiller.com/pricing	Pricing	Text	Do Follow
4	https://www.healthbiller.com/dpc	Direct Care	Text	Do Follow
5	https://www.healthbiller.com/mobile	Mobile	Text	Do Follow
6	https://www.healthbiller.com/news	News	Text	Do Follow
7	https://www.healthbiller.com/videos	Videos	Text	Do Follow
8	https://www.healthbiller.com/license	License Agreement	Text	Do Follow
9	https://www.healthbiller.com/privacy	Privacy	Text	Do Follow

URL	Spam Score	DA	Date Crawled
Alexa top domain list || page 151 heena.pw/domain-list-151 nofollow via redirect	82%	5	12/02/2022
Direct Primary Care Insurance beauty-health-news.info/direct-primary-care-insurance/ nofollow	81%	11	09/19/2021
Direct Care Healthcare beauty-health-news.info/direct-care-healthcare/ nofollow	81%	11	09/19/2021
Health Billing Systems beauty-health-news.info/health-billing-systems/ nofollow	81%	11	09/14/2021
Direct Primary Care Health Insurance Plans beauty-health-news.info/direct-primary-care-health-insurance-plans/ nofollow	81%	11	09/09/2021
Xiberhealth.com Health | Life-Healthy.Net life-healthy.net/xiberhealth.com/ nofollow	80%	3	09/19/2021
Redirecting to https://www.healthbiller.com/ life-healthy.net/goto.php?url=aHR0cHM6Ly93d3cuaGVhbHRoYmlsbGVyLmNvbS8=	80%	3	03/27/2022
Alexa top domain list || page 151 www.varsha.pw/domain-list-151 nofollow	80%	6	12/24/2022
Alexa top domain list || page 151 www.varsha.pw/domain-list-151 nofollow via redirect	80%	6	12/24/2022
Alexa top domain list || page 151 deepali.pw/domain-list-151 nofollow via redirect	80%	5	10/18/2022
www.healthy-tips.info/home-health-biller-job-description/ nofollow	79%	15	11/15/2022
Alexa top domain list || page 151 www.bestwap.pw/domain-list-151 nofollow	79%	7	12/04/2022
Alexa top domain list || page 151 www.bestwap.pw/domain-list-151 nofollow via redirect	79%	7	12/04/2022
Alexa top domain list || page 151 anushka.pw/domain-list-151 nofollow	79%	5	12/04/2022
Alexa top domain list || page 151 anushka.pw/domain-list-151 nofollow via redirect	79%	5	12/04/2022
Alexa top domain list || page 151 pari.pw/domain-list-151 nofollow	78%	7	12/14/2022
Alexa top domain list || page 151 pari.pw/domain-list-151 nofollow via redirect	78%	7	12/14/2022
Alexa top domain list || page 151 dipa.pw/domain-list-151 nofollow	78%	12	11/07/2022

Findings:

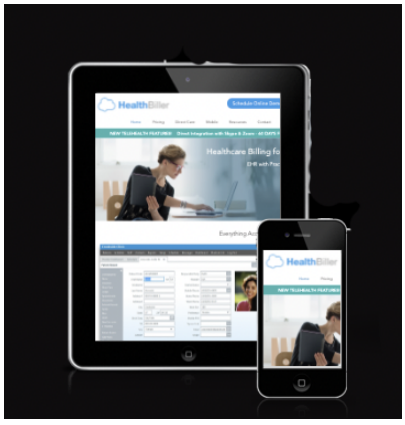
HealthBiller has significantly fewer internal or external links that are passing equity. Since Google utilizes this metric in part to ascertain if a website has optimal UX/UI this is a problem. Many of your competitors are doing a much better job.

The standard that HealthBiller should adhere is where there is a three to one ratio for every three-internal links there should be one external link but ONLY to a website that truly has valuable information and a higher Domain Authority score. This is the reason we did not grade the External Nofollows links as there might be legitimate reasons why you place a Nofollow code for some external links (e.g. Domain Authority is lower on the external page)

Recommendations:

The HealthBiller needs to implement an internal and external linking strategy where there should be a three to one ratio for every three-internal links there should be one external link but ONLY to a website that truly has valuable information and a higher Domain Authority score. The external links should only open in a new window.

Mobile Website Performance



The world has gone mobile. The company that does not implement a mobile first strategy will find they lose favor with both Google and their perspective clients. Here are some statistics that address the importance of having a website that is fully optimized for use on a smartphone and tablet.

- Up to 70% of web traffic happens on a mobile device (CIODive, 2018)
- 57% of all U.S. online traffic now comes from smartphones and tablets (BrightEdge, 2017)
- Mobile searches for “best” have grown over 80 percent in the past 2 years (Google, 2017)
- 51% of customers say that they use mobile devices to discover new brands and products (BrightEdge, 2017)
- 69% of smartphone users also say that they are more likely to buy from companies with mobile sites that easily address their questions or concerns (BrightEdge, 2017)
- Worldwide, more people own a cell phone than a toothbrush. (Consumer Technology Association, 2015)

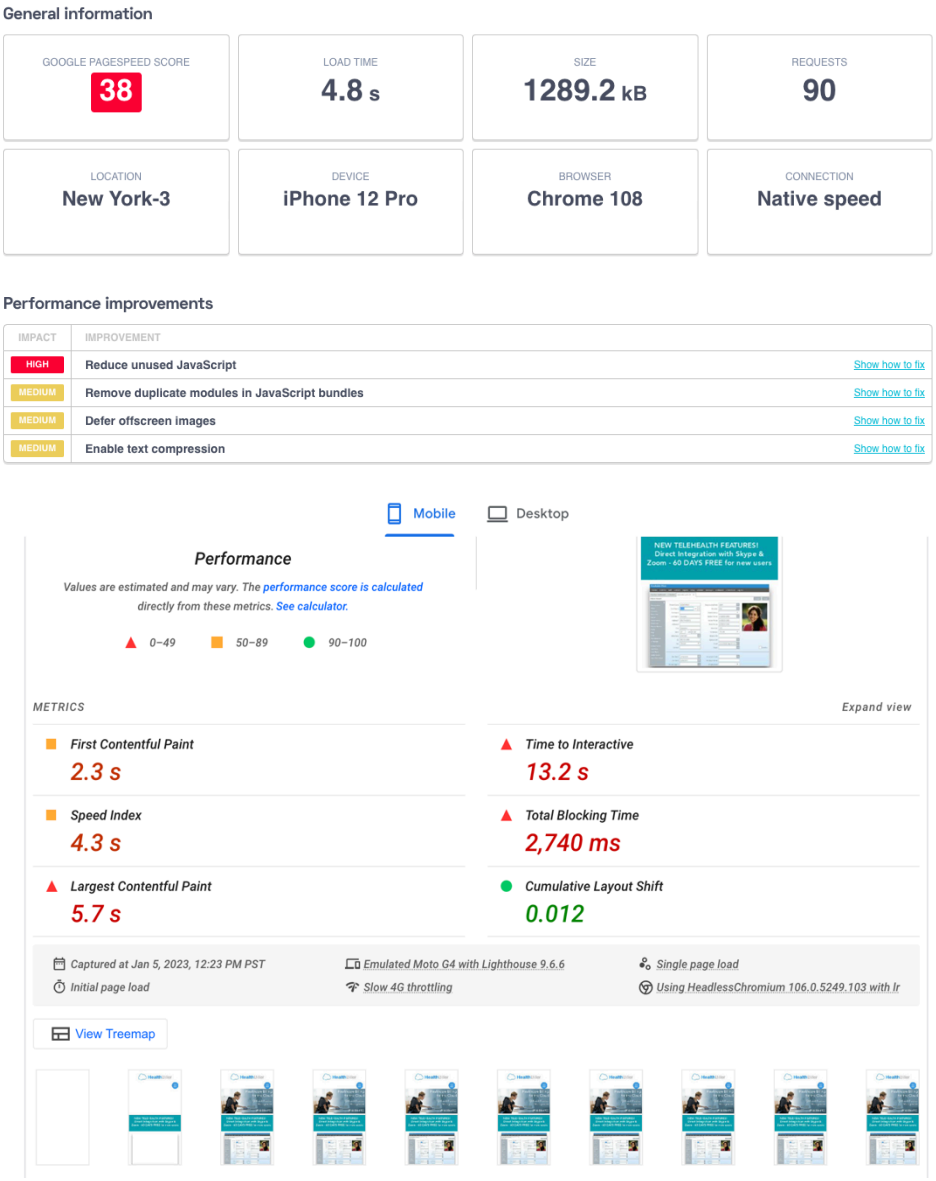
This trend is growing at an amazing pace. The North American Market the consumer is turning to their mobile devices for website shopping at a record pace. In Canada, it is growing at a rate of 19% Year over Year and in the United States 24%.

A seamless mobile performance is critical.

- When faced with a negative mobile engagement experience, 43% of consumers will go to a competitor’s site. (Radware).
- The negative experience that is most often the basis for that negative engagement experience is slow performance on the mobile device. A 500ms connection speed delay results in up to a 26% increase in peak frustration and up to an 8% decrease in engagement (Radware).
- Approximately two-thirds (66%) of mobile users have attempted but failed due to poor user experience (Radware)

Therefore, it is so critical that HealthBiller has a world class mobile experience.

Company	URL	Responsive	Mobile Friendly	Mobile Optimized	Load Time	Mobile Site Size	Google PageSpeed Mobile Performance	Speed Index	First Meaningful Paint	Time to Interact
HealthBiller	HealthBiller.com	Yes	Yes	No	4.8 S	1279.4 KB	38	4.3 S	2.3 S	13.2 S
ClinicSource	clinicsource.com	Yes	Yes	No	3.2 S	1152.5 KB	22	9.9 S	3.5 S	19.7 S
Foothold	footholdtechnology.com	Yes	No	No	5.0 S	1915.4	28	5.3 S	3.0 S	15.2 S
Kareo	Kareo.com	Yes	No	No	7.3 S	5661.3 KB	16	10.6 S	6.1 S	34.2 S
Luninello	Luminello.com	Yes	No	No	3.4 S	2340.8 KB	17	16.9 S	4.1 S	35.3 S
Procentive	Procentive.com	Yes	Yes	No	2.9 S	2427.7 KB	19	7.7 S	4.7 S	17.6 S
SimplePractice	Simplepractice.com	Yes	Yes	No	6.2 S	1989 KB	19	7.5 S	4.9 S	20.6 S
Theraphy Appointment	therapyappointment.com	Yes	Yes	No	4.1 S	2569.9 KB	23	3.6S	2.8 S	15.9 S
TheraNest	TheraNest.com	Yes	Yes	No	9.3 S	3023.6 KB	25	6.6 S	2.7 S	22.4 S
TherapyNotes	Therapynotes.com	Yes	Yes	No	2.4 S	1119.8 KB	77	2.8 S	2.6 S	3.0 S
Valant EHR Suite	Valant.io	Yes	Yes	No	0.9 S	424.5 KB	89	2.6 S	2.6 S	3.1 S



Findings:

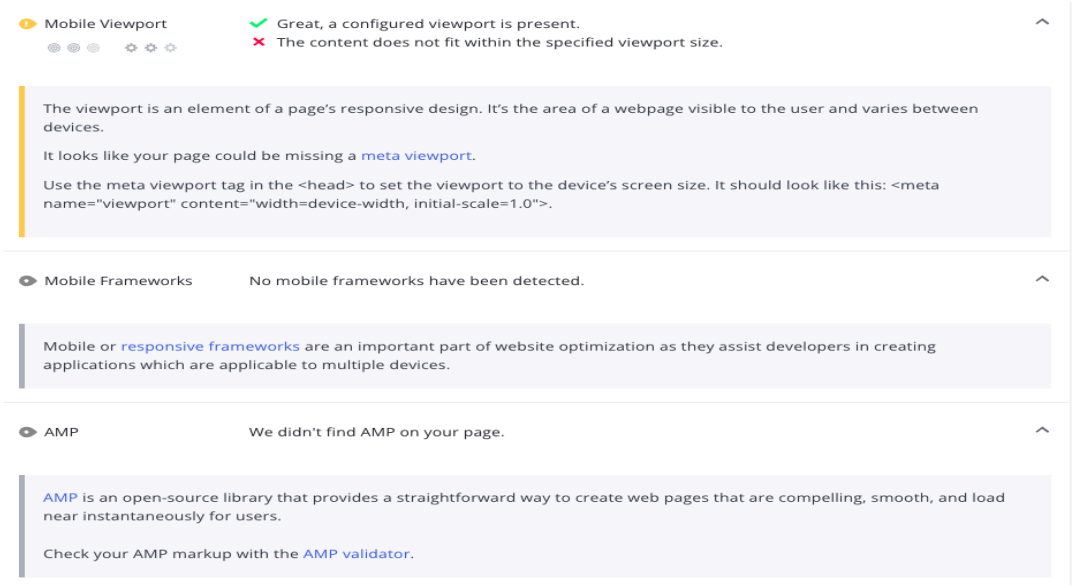
When GOOGLE says, you have a problem…. You have a problem.

The current HealthBiller website has a problem. It is extremely slow and is **not** mobile optimized. Separate mobile speed tests showed the same problem provided tools.

Load Speed – One Google test shows that while the mobile version of HealthBiller's website has an initial first content paint of 2.3 seconds, it takes an average of 13.2 seconds (Google) before a person can effectively interact with the website. Uptrends rated the mobile load speed at 30% which is well below acceptable standards. Uptrends has clocked the mobile load time at 4.8 seconds.

While these speeds may not appear to be excessive, especially when compared to the other listed competitors, the fact is that HealthBiller has an extremely light site that should be loading much quicker.

Part of the reason is the failure to have an Accelerated Mobile Protocol (AMP) and a mobile framework.

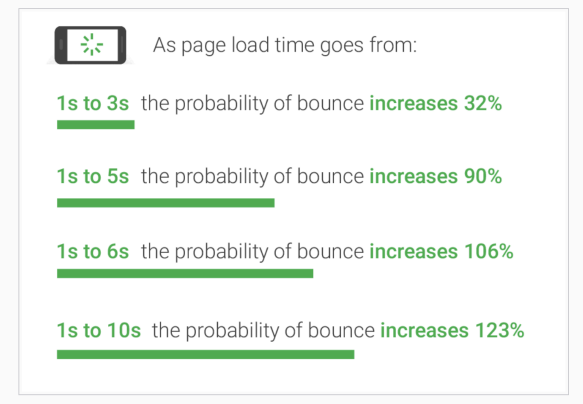


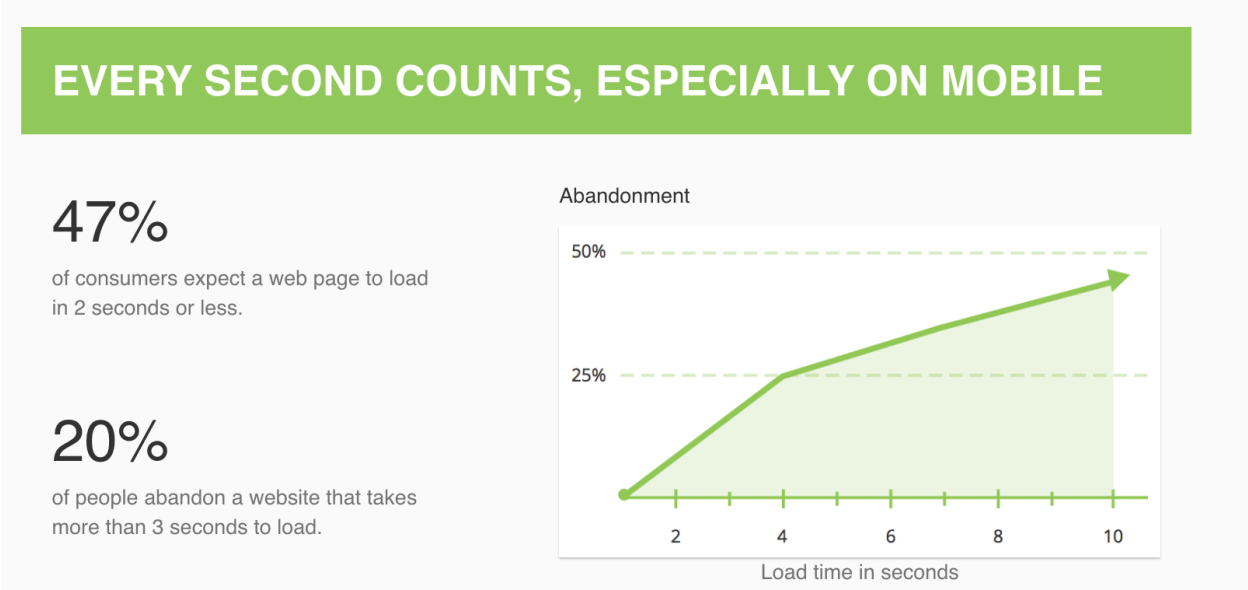
Other issues that need to be address are:



Mobile First Strategy: The HealthBiller mobile site is a knock off its desktop version. The user experience is not intuitive. It is critical that the user interface be such that the consumer can look at and instantly know how to use. Buttons should look like buttons, with ample space around them so that fingers can press individually with ease. They should also be large enough that they do not look like they require a mouse.

SEO: Speed is one of the ranking factors for SEO in general. Google doesn't want users to be stuck waiting for a slow page to load when there are faster quality websites out there. So, the fact that your mobile website loads slow not only negatively impacts the user experience but severely impacts Google sending organic traffic to when the user is operating a mobile device.





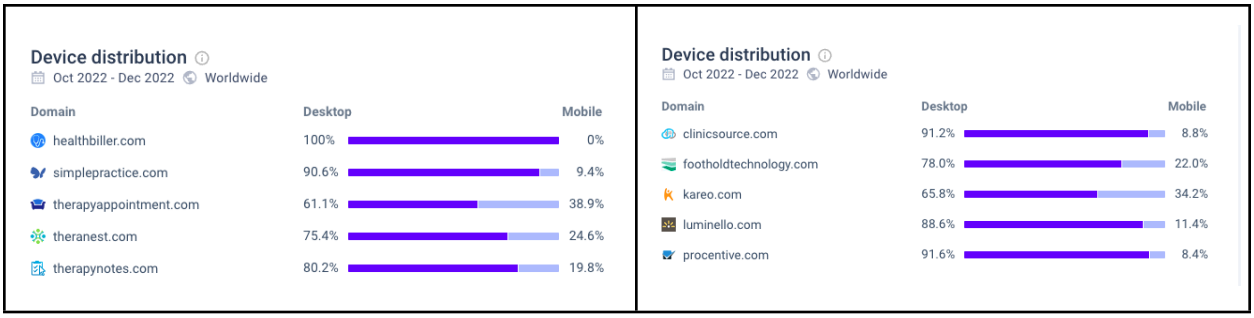
Mobile Website Recommendations:

HealthBiller needs to take a mobile first strategy

Google has taken a mobile first strategy for their own business. HealthBiller needs to adopt the same approach. In a mobile first strategy, a company's web presence is designed for mobile devices first and desktop second. The desktop website design is made as simple as possible. It can then be upgraded with additional features that are only accessible to desktop users. This contrasts with a desktop first strategy in which a website is built to the company's satisfaction and then has its non-compatible elements stripped to create a mobile site.

Desktop v. Mobile Performance

The UX/UI, load time, and many other factors dictate whether a visitor to your website will be engaged or bounce. Below is a comparison of desktop v. mobile performance for HealthBiller and nine of its competitors



The volume of traffic to HealthBiller is so low that the testing software cannot adequately detect how much traffic is from desktop as opposed to mobile. We would need access to Google Analytics to make that determination.

However, the industry average takeaway is only about 10% the industry leaders are averaging 25% of their traffic is through mobile devices. This is more in line with industry standards where the trend even for B2B is

HealthBiller as most of their competitors do not have a mobile first initiative that would significantly improve the user experience and organic traffic for mobile devices. This does not mean desktop website traffic is hampered but different elements are needed depending on the device being used.

Marketing SaaS is often a game of making incremental improvements in a lot of different areas. A half of percent improvement in traffic here a percent there will translate into substantial sales.

Performance SEO Analysis

Have a website that is fully optimized for On-Page SEO, UX/UI, Marketing and Conversions is simply foundational. That alone will not provide the leads necessary to achieve marketing/sales success.

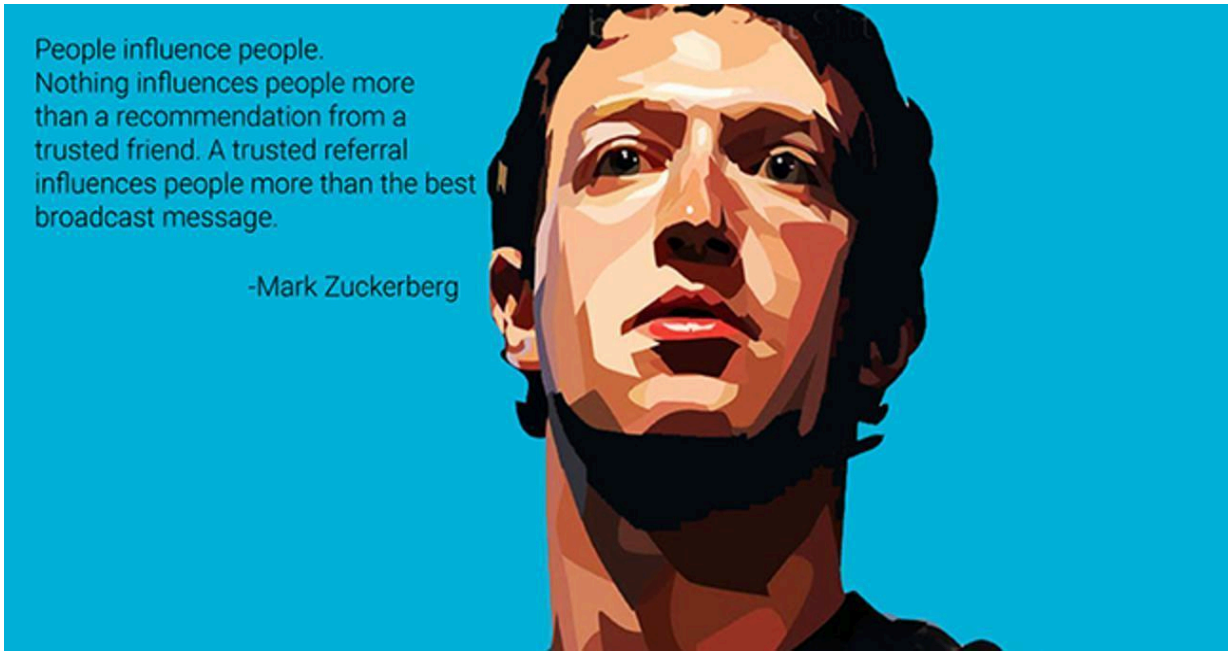
Getting Google and other search engines to send organic traffic to the site requires implementation of Performance SEO and Demand Generation Activities.

Performance SEO can comprise many different engagement activities including: Influencer Marketing (which consists of earned media, Social Proof, traditional PR and social media)

We will examine HEALTHBILLER and their respective competitors for each of these areas.

- Influencer Marketing
- Social Media Marketing
- Trusted Source
- Influencer Outreach
- Earned Media
- Content Creation

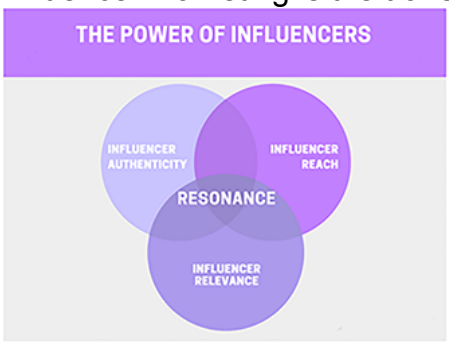
Influencer Marketing Analysis



The most impactful and cost-efficient method of growing your business – if done correctly. A recent case study by TapInfluence and Nielsen Catalina Solutions, influencer marketing delivers 11 times the ROI of digital marketing--as it pertains to actual revenue, not impressions and views, but actual revenue.

Why is Influencers marketing the most cost effective and impactful methods of improving brand awareness, loyalty, engagement and, sales? It goes back to another Principle of Influence by Dr. Robert Cialdini.

Influencer marketing is the transfer of information and trust from a person who is respected for their knowledge, expertise, or social position. Influencer marketing can take many forms from word of mouth, earned media, social media and public relations.



The key is to find and make brand allies who, through engagement and nurturing, become powerful brand influencers and advocates.

People follow the lead of credible, knowledgeable experts or those they perceive to be knowledgeable experts. The internet has brought us self-proclaimed experts who by the sheer volume and type of reviews are now trusted by the masses. The science has shown that it's important to signal to others what makes a person a credible, knowledgeable authority before you make your influence attempt. The science also shows that it doesn't seem to matter if the person who introduces you is not only connected to you but also likely to prosper from the introduction themselves.
Here is why you need to put influencers on the home page of your website:

- 70 percent of teenage YouTube subscribers trust influencer opinions over traditional celebrities. Google
- 86 percent of women turn to social networks before making a purchase. (Influence Central)
- 71 percent of consumers are more likely to make a purchase based on a social media reference. (HubSpot)
- 86 percent of the most-viewed videos on YouTube were made by influencers, compared to 14 percent by brands, themselves. video views have increased 65 percent year over year. (Pixability)
- 57 percent of companies use influencers as part of their marketing strategies, while an additional 21 percent are also planning to add this strategy to their campaigns in 2017. (Ion)
- 11.7 percent of US marketing budgets is devoted to social media, up from 3.5 percent in 2009. (Ion)
- On average, businesses generate $6.50 for every $1 invested in influencer marketing. (Tomson)

Influencer Marketing embodies several different elements. It can be traditional PR, Social PR, Earned Media, and Shared information from Mega, Macro, and Micro Influencers.

Traditional PR is very effective when it works, but your investment in a publicist cannot be guaranteed. With influencer marketing, you will not only be seen--but if an influencer has chosen to work with you, you'll also be seen in a positive light.

Digital advertising works, but Millennials often block ads--so you're spending dollars without knowing if people are seeing you. People electively follow influencers, so there's no getting blocked.

Traditional Advertising is Becoming Noise:

- 1,700 Banner Ads Each Month
- 0.1% CTR
- Ad Blocking grew 40%
    - 86% of Consumers Skip TV Ads
    - 44% of Direct Mail Never Opened
    - 91% Unsubscribe Rate
    - 200 Million on Do Not Call List

Mega-Macro-Micro Influencers

Influencer marketing works because we tend to listen mostly to the people that we trust. In today's hectic world where there is information overload, we take shortcuts when making buying decisions. These shortcuts are based on sound scientific principles that Dr. Robert Cialdini shared in his book *Influenc*e. These principles explain why we will trust and act upon information shared by people we barely know or just know because we follow them on social media.

- Mega Influencers:
  - Actors-Artists-Athletes
  - Typical has over 1 million followers
  - Drives 2%-5% engagement with each post
  - Think Kardashian or LeBron James

- Macro Influencers:
  - Executives – Bloggers – Journalists
  - 10,000 to 1 Million Followers
  - Drives 5% - 25% Engagement with each post

- Micro Influencers:
  - Consumers – Employees
  - 100 to 10,000 Followers
  - Drives 25% - 50% engagement with each post

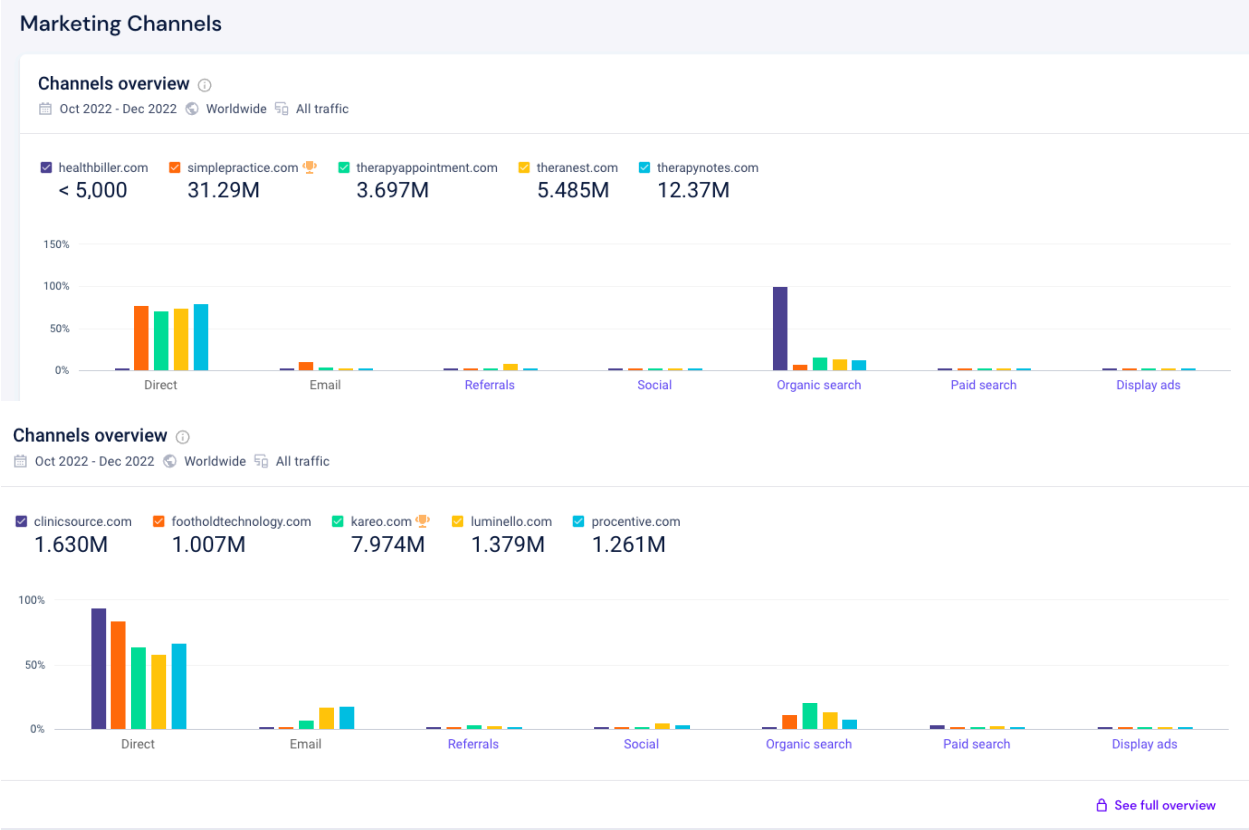
Why should you care about implementing a comprehensive influencer marketing program? Consider these statistics:

- 97%% of Millennials Post on Social Networks and Share Experiences with Friend's Advertising
- 81% of Online Purchasing Decisions are Influenced by Friend's Online Posts
- 67% of Shoppers Spend more Online after Reading Recommendations (Nielsen)
- **70% of Consumers Research Online before Purchasing (Google ZMOT 2011)**
- 92% of Consumers Trust Earned Media over Advertising (Nielsen 2012)
- 12X More Trust in Consumer Recommendations than Brand Generated Messages (eMarketer 2010)
- **The Average ROI for every $ Spent in 2019 was $11.69**
- **Word of Mouth Retains Customers 37% Better than Other Advertising**
- 3X Higher Click-Through Rates than Sponsored Posts

The way to measure the impact of influencer marketing is tying it directly to sales. For

Macro Influencers, each engagement does require an expenditure in cash or products. However, the effectiveness and expected ROI can and should be established before engaging them.

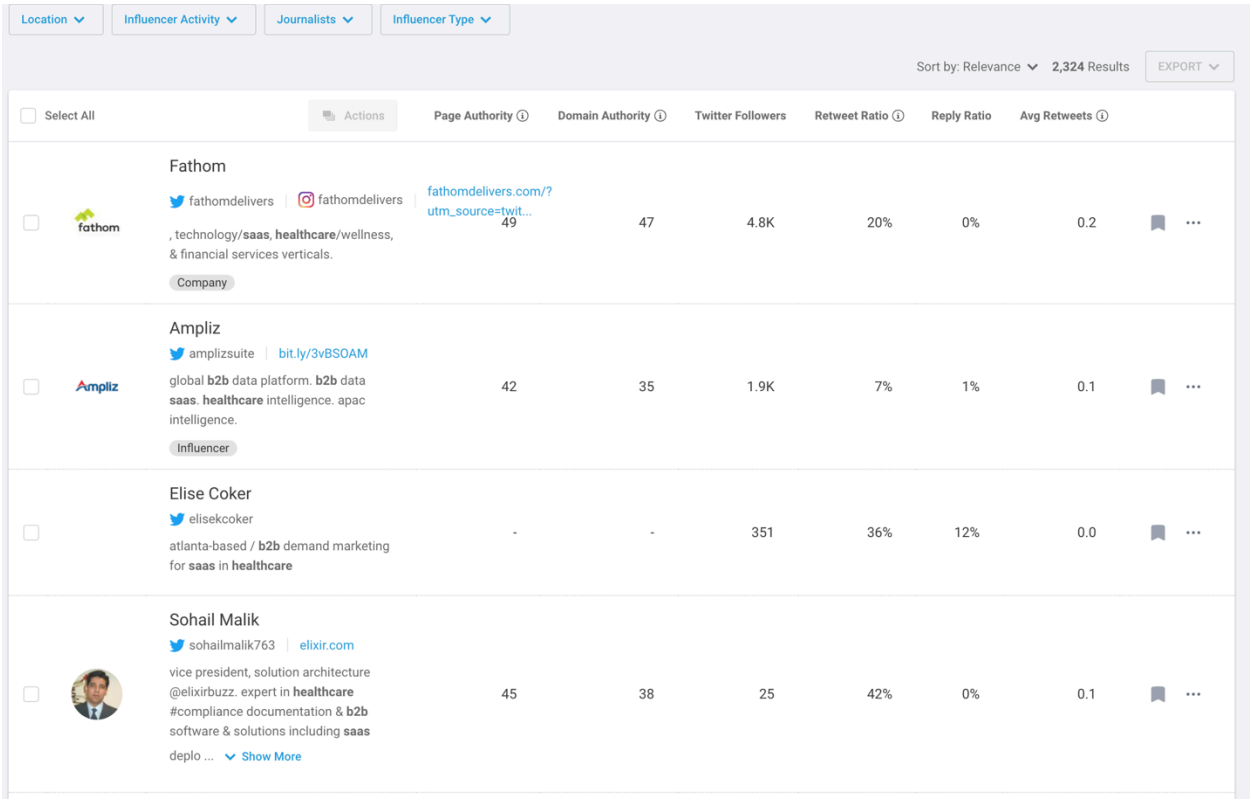
Since the sales metrics for influencer marketing is not currently available, we use secondary measurements that show how impactful your influencer marketing program is performing.



Typically, the three areas that are impacted by influencer marketing are social channels direct traffic, and to a lesser extent organic search.

Almost 100% of the traffic to HealthBiller is organic search. In our social media analysis, it is clear that little or no effort has been placed on influencer marketing or social media marketing. In order to engage B2B Healthcare SaaS influencers, it is critical to define who is an influencer in that space and then establish a drip campaign to elicit them as sharing organic influencers.

Using tool such as Buzzsumo, you can define not only which influencers are in that space but how they engage what type of influence they have with their followers.



Findings:

One of the areas that needs further study, and which only can be ascertained by reviewing internal procedures are the steps taken to develop influencers. We previously identified the importance and value of generating influencers. These are highly respected individuals who have a social reach that is comprised of your targeted personas but is larger and better segmented than your own list.

If you can get them to share information with this list, it will not only provide lead generation but their influence will help build trust and convert them to customers. While influencers can be paid to provide such service, the better way to develop them in a more organic process. There are software technologies that have been developed that will optimize and shorten this process. They can unfortunately be both costly and can sometimes be a turnoff to prospective influencers. Where technology is not warranted either due to cost or the nature of the community, we have developed a process for identifying, nurturing, and converting influencers.

Since influencers receive lots of requests it can take time to develop the trust and repertoire necessary for them to become an advocate for your product or to get them to share resources that you have developed.

While the manual process of developing, these resources is contained in an 18-page document, the essence of the program can be summarized in a five-step framework structure.

- ❖ Identify targeted influencers based on reach, influence and whether they align with your brand message.
- ❖ Engage them on all social platforms to build repertoire. This process is done by commenting, sharing and asking questions. The goal is to utilize the law of reciprocity to develop this relationship.
- ❖ Provide them access to unique and exclusive content that will heighten their brand.

Once you have established some type of connection or relationship to influencers, you can begin your outreach utilizing pre-existing emails and templates. We will also be tracking influencer outreach performance on monthly scorecard.

Recommendations:

Development of Brand Advocates and Ambassadors - Identify and engage with thought leaders, influencers and HealthBiller's "friends" (brand ambassadors) by creating a network of advocates that will share their content on social media and reference them in blog posts, webinars, and premium content (eBooks, videos, speaking engagements and other live events) to help build the brand.



Our efforts will encourage these brand advocates to submit guest blog posts on the HealthBiller blog and seek opportunities to submit guest posts on influencer blogs.

Particularly effective can be an ongoing Podcast series that is co-sponsored by a respected industry thought leader with a high degree of social influence. HealthBiller will not only capitalize on its credibility, but also gain access to its audience.

HealthBiller can either apply time or money to address this lack of influencer contributions to their lead generation.

Money**:** While there are software solutions and people who will exchange time, and sharing for money, they are usually not effective in a b2b engagement. So, when we discuss using money to generate influencer activity, we are speaking of software alternatives (e.g. Socedo) that will mimic best practices to identify and cultivate influencers who will have the respect and following of your targeted audience. The problem with many products in this field the APIs that connect them to the social platforms are often pulled or restricted (e.g. Socedo) requiring a user to seek different alternatives.

Manual Process (time): The manual process that was discussed above works extremely well and usually generates influencer activity that is significantly more powerful.

Social Media Analysis

Social networks are one of the fastest growing industries in the world. With social media projected to have a 25% annual growth over the next five years, those companies who fail to harness the power of social media will be lost in the marketplace.

Social Networking Sites

Like with content marketing, due to the continuously developing internet marketing industry, there are countless digital media and social networking sites, all of which have a unique characteristic and purpose. As part of an introduction, here are a few social network examples.

Facebook: is the biggest and arguably most powerful social network in the world with 1.55 billion active monthly users. Regardless if you are a startup or fortune 500 company, you need to be on Facebook and start engaging with your consumers.

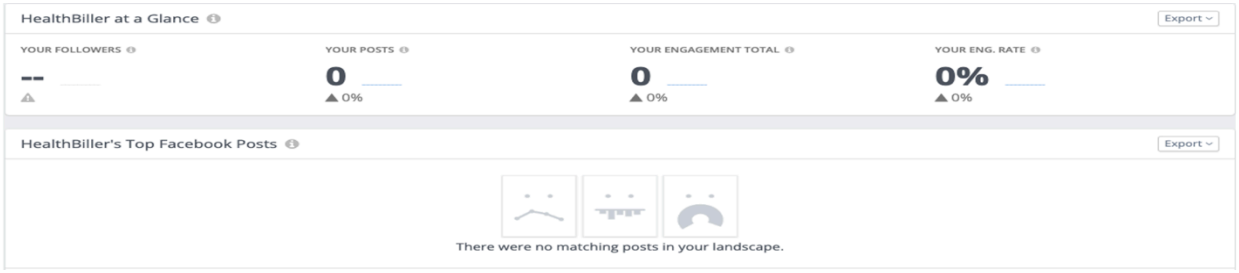
Twitter is known as the ‘‘in the moment’’ platform and boasts a respectful 255 million active monthly users. Twitter is a perfect online marketing tool for businesses that want to reach out to people (and are ready for a reply). The key is to be quick, smart and responsive.

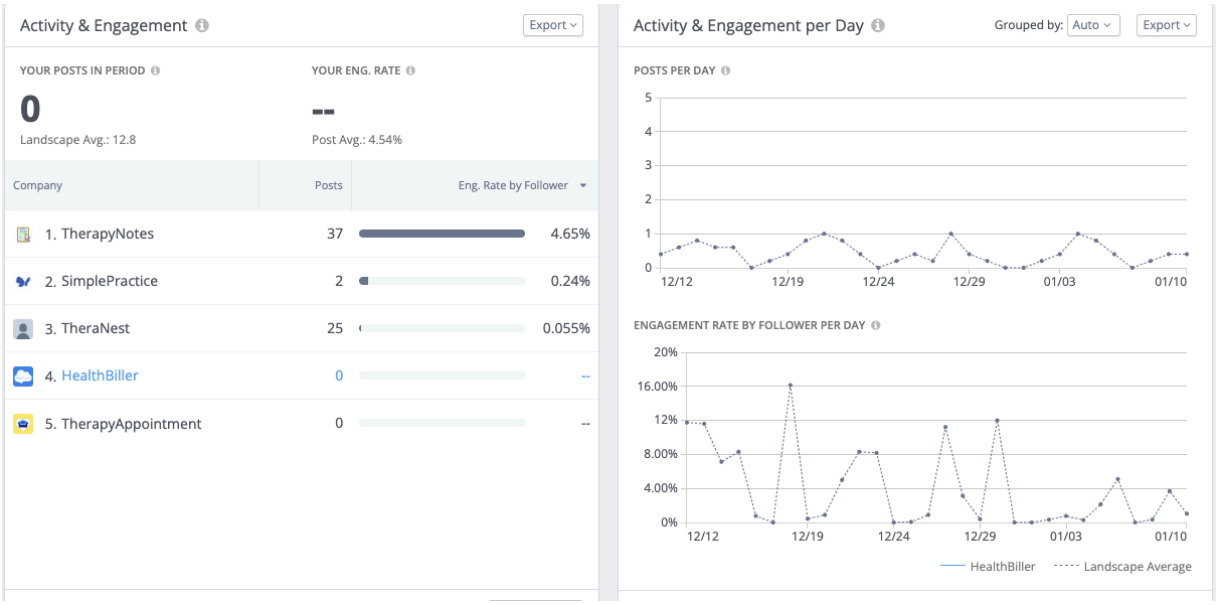
Instagram is a visual platform designed for customers to post, share, comment and engage through digital media. As the old saying goes, a picture is worth a thousand words.

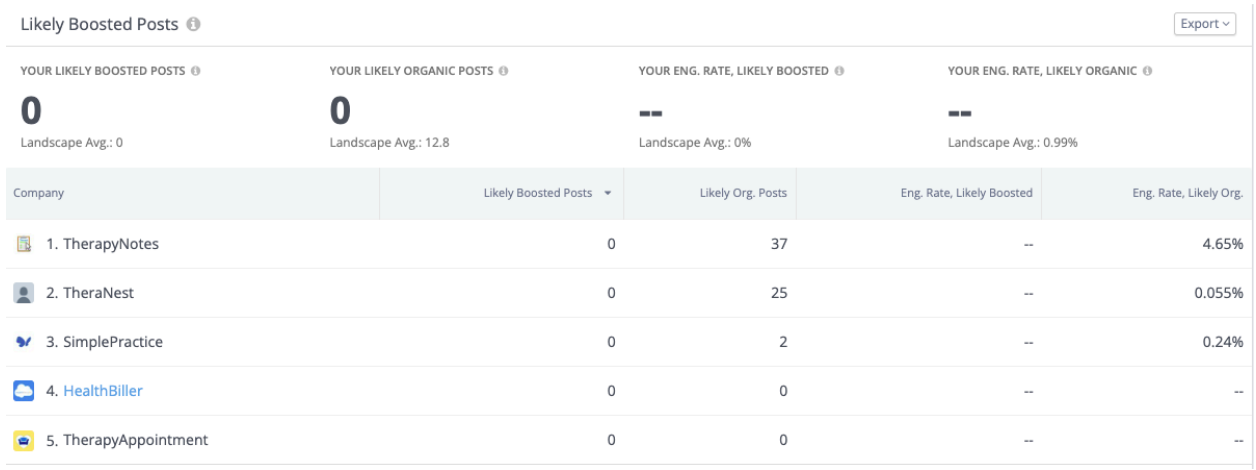
LinkedIn is regarded as the professional social networking site. Any b2b company that is not engaging and sharing on LinkedIn is missing out on a direct market to prospective buyers.

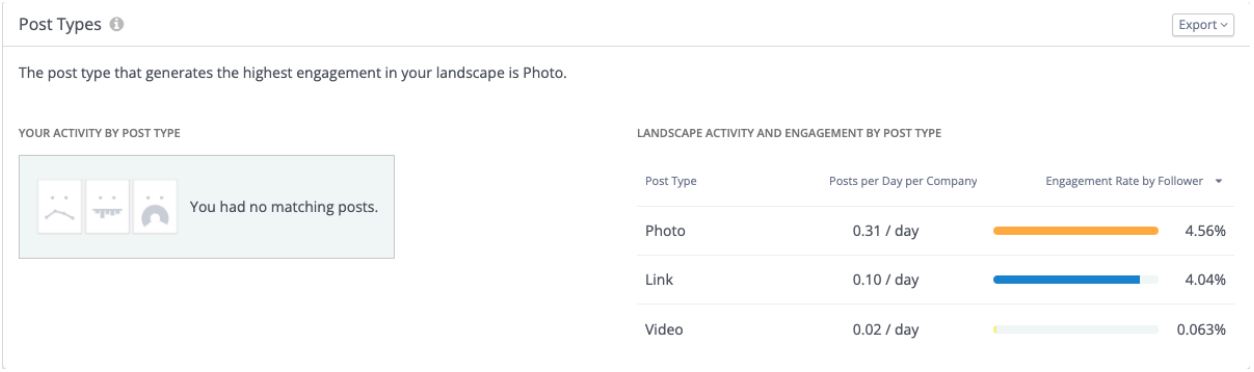
Facebook Analysis

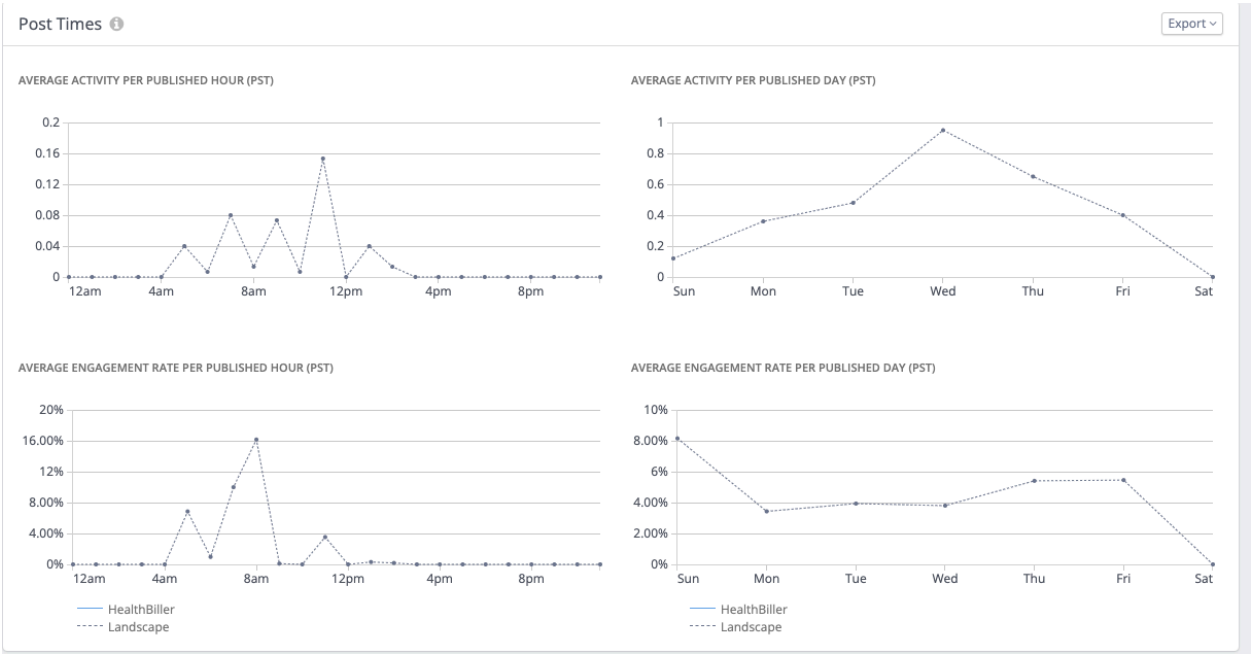
NOTE: The software being used requires administrative access to HealthBiller Social Media Accounts to provide more detailed information. If such access is granted the information will be far more accurate and actionable.



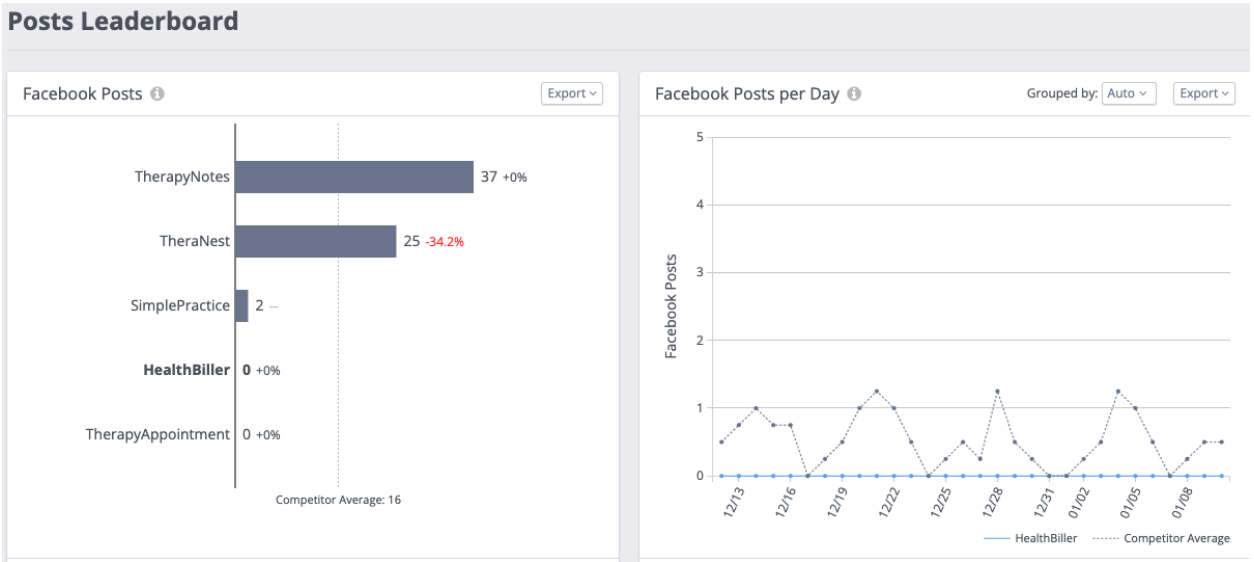








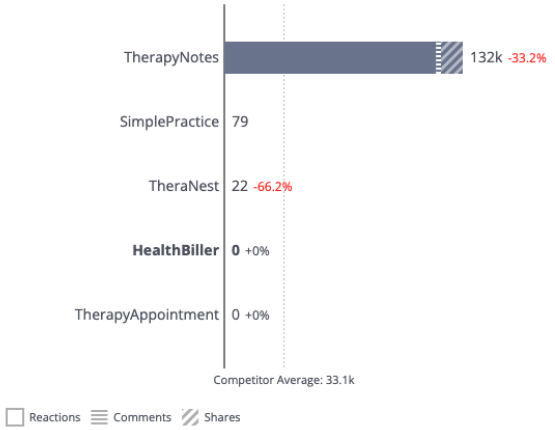
Competitor Analysis:



Engagement Leaderboard

Facebook Engagement Total

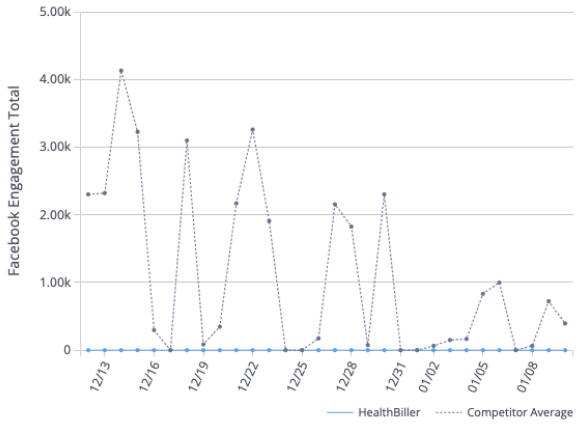
Export



Facebook Engagement Total per Day

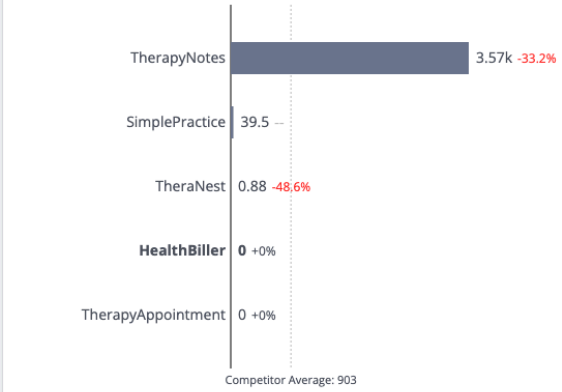
Grouped by: Auto

Export



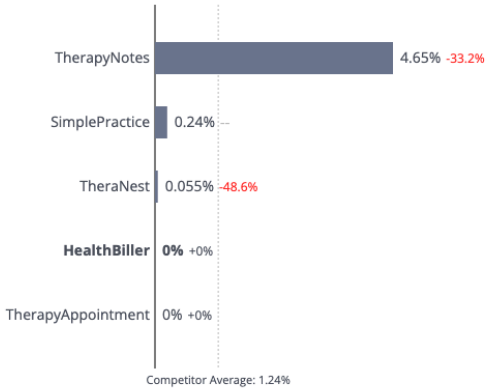
Facebook Engagement Total / Post

Export



Facebook Engagement Rate by Follower

Export



Popular Topics

Export

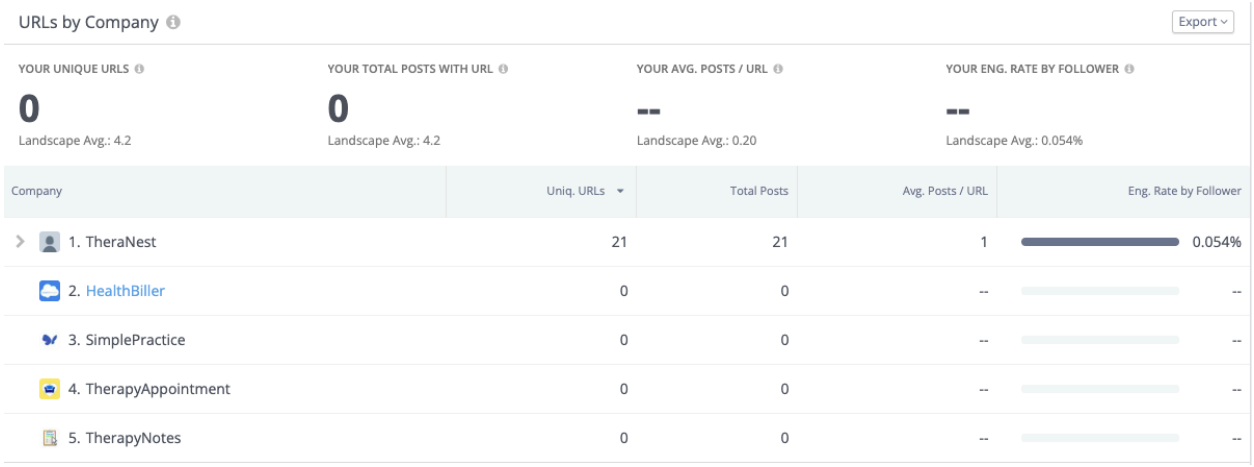
No popular topics found in this set of posts.

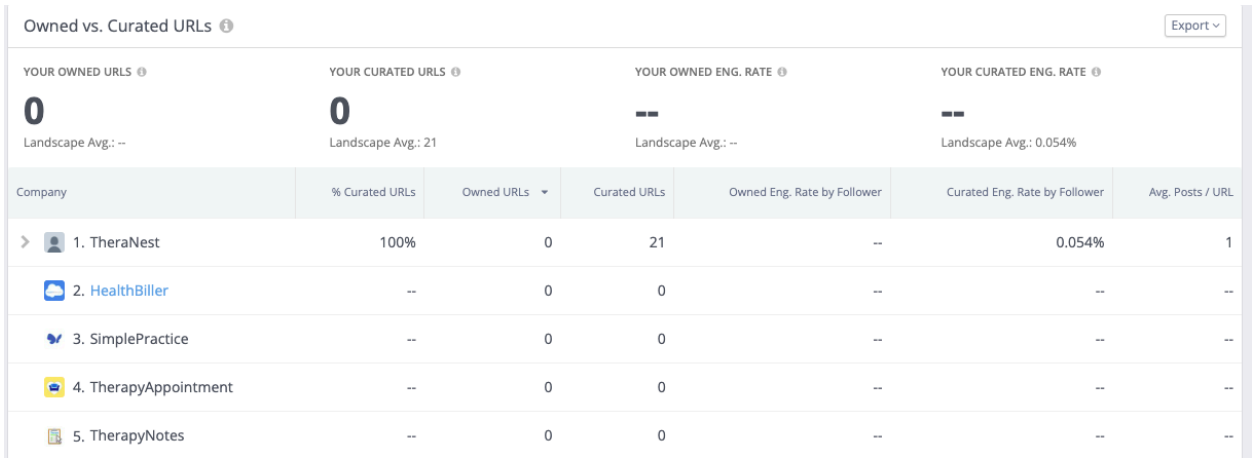
Hashtags

Export

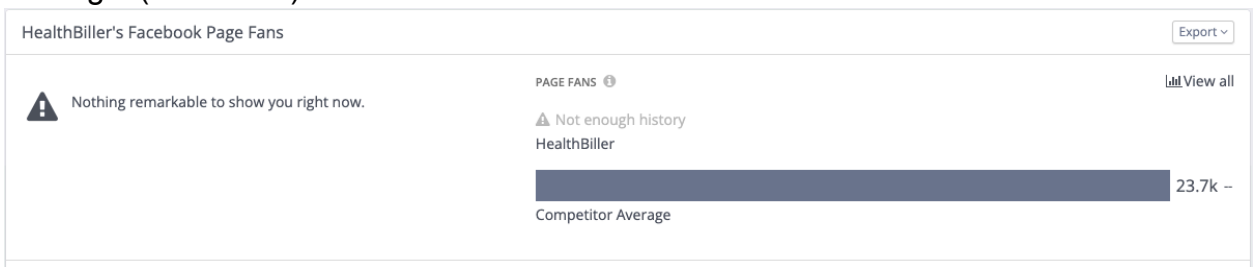
Of the **8** most broadly used Hashtags, **#clinic** generated the highest Engagement Rate by Follower. You didn't use any of these Hashtags.

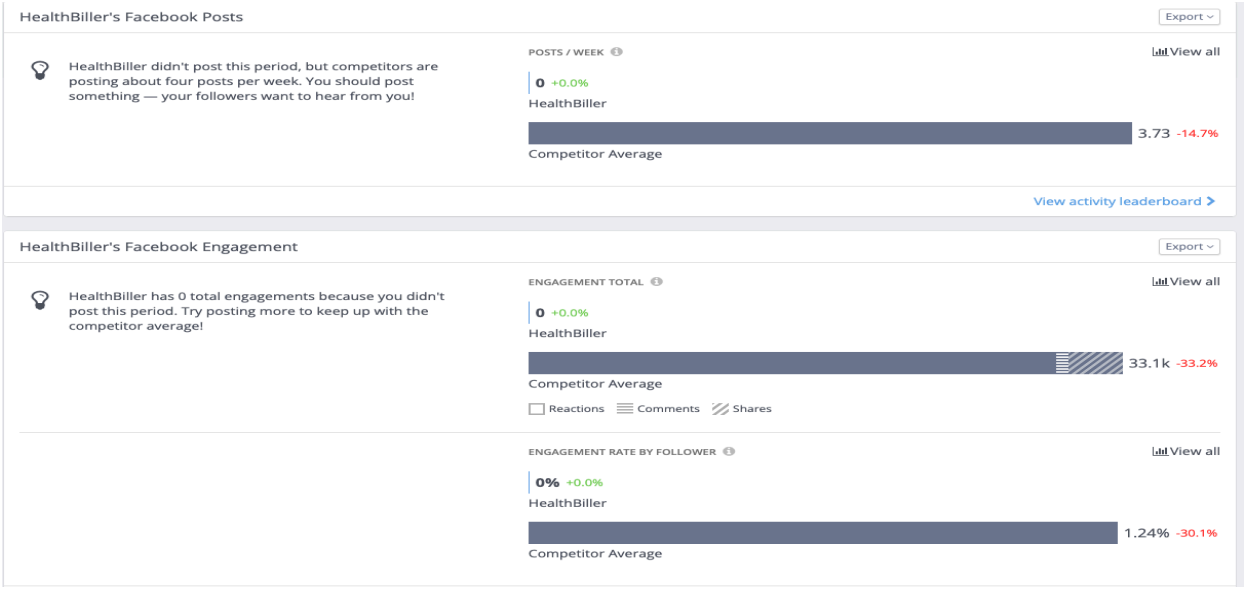
Hashtag	Companies Using	Posts	Eng. Rate by Follower
#mentalhealth	2	6	0.22%
#wellness	1	1	0.29%
#therapy	1	1	0.29%
#selfcare	1	1	0.29%
#rehab	1	1	0.31%
#mentalhealthawareness	1	1	0.29%
#health	1	1	0.29%
#clinic	1	1	0.31%





Findings: (Facebook)





HealthBiller has surrender the Facebook channel to their competitors completely. The good news is that the targeted competitors are not fully taking advantage of the potential Facebook has to offer for a B2B SaaS product. The detailed reporting is mostly to establish a baseline for an ongoing comparison

A more detailed findings and recommendation for all of social media will take place at the end of the Social Media section but it is critical to understand the importance of a vibrant Facebook account.

Facebook has both a pay to play (paid advertising) component as well as organic postings.

Facebook wants you to pay to play. It's unfortunate, but it's true. About 98% of Facebook's revenue is generated by ads. And, unsurprisingly, the average reach of an organic post (without paying for an ad) is a sad 5.2%. It's quite simple: the more you see the need for a Facebook ad — because you're not getting satisfactory reach — the more money Facebook makes.

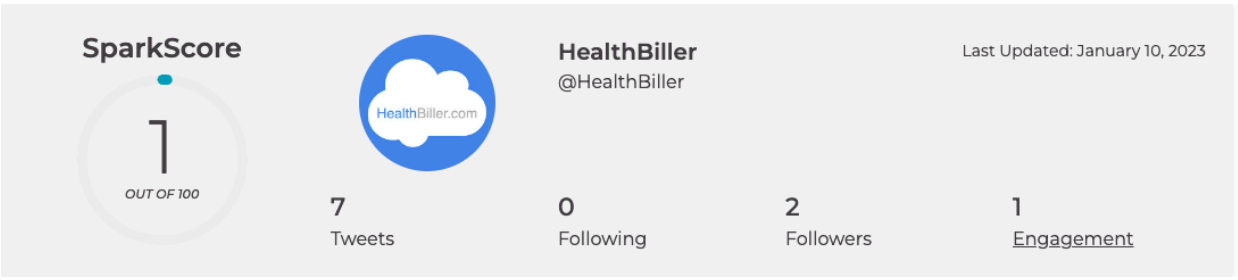
If used properly, Facebook paid promotions can increase sales by 34%. However, for most startup companies paying for advertisement is not a viable strategy.

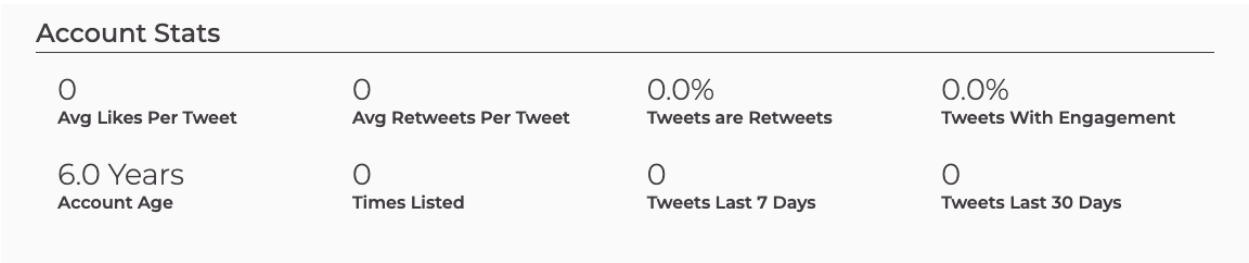
To best utilize Facebook's organic capabilities, consider that organic Facebook postings are not meant to make the sale. Rather, this could be a place where you plant the seed, promoting brand awareness and developing other parts of your business. What we mean, is that instead of a post about your services, you might instead promote your business's podcast, newsletter, or other helpful tools.

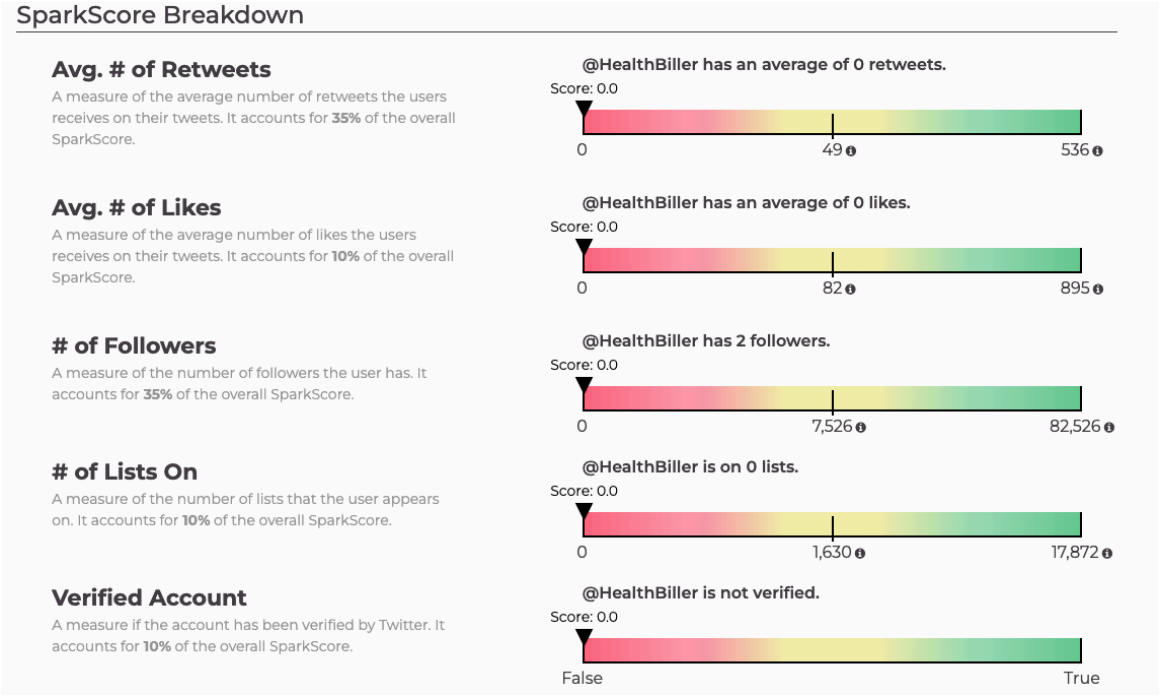
If you get traction on any Facebook organic promotion for such things as your podcast or webinar, consider using the paid component to amplify your reach. Facebook can be a great B2B marketing tool, but it's vital that you use it strategically.

Twitter Analysis

NOTE: The software being used requires administrative access to HealthBillers Social Media Accounts to provide more detailed information. If such access is granted the information will be far more accurate and actionable.







Fake Followers Audit for @HealthBiller

HealthBiller
@HealthBiller
2 Followers

100.0% (2) Fake Followers

This tool defines "fake followers" as accounts that are unreachable and will not see the account's tweets (either because they're spam, bots, propaganda, etc. or because they're no longer active on Twitter).



Accounts with a similar sized following to @HealthBiller have a median of 18.5% fake followers. This account has more fake followers than most.

Follower Quality Distribution



Engagement Score

Engagement

1

OUT OF 100

Engagement score, is a comparison of @HealthBiller and other accounts with between 0 and 25 followers. @HealthBiller currently averages 0 likes per tweet, while similar accounts average around 0.02 likes. @HealthBiller also averages 0 retweets per tweet, while the similar accounts average around 0.01 retweets.

Avg. # of Retweets

A measure of the average number of retweets the users receives on their tweets. It accounts for **40%** of the overall Engagement Score.

@HealthBiller has an average of 0 retweets.

Score: 0.0

0.6 | 0.0057 | 0.0436

Avg. # of Likes

A measure of the average number of likes the users receives on their tweets. It accounts for **30%** of the overall Engagement Score.

@HealthBiller has an average of 0 likes.

Score: 0.0

0.6 | 0.0226 | 0.17

Tweets Per Week

A measure of the number of non-reply tweets the user sends per week. It accounts for **20%** of the overall Engagement Score.

@HealthBiller tweets on average 0 times per week.

Score: 0.0

0 | 42 | 84

Following to Followers Ratio

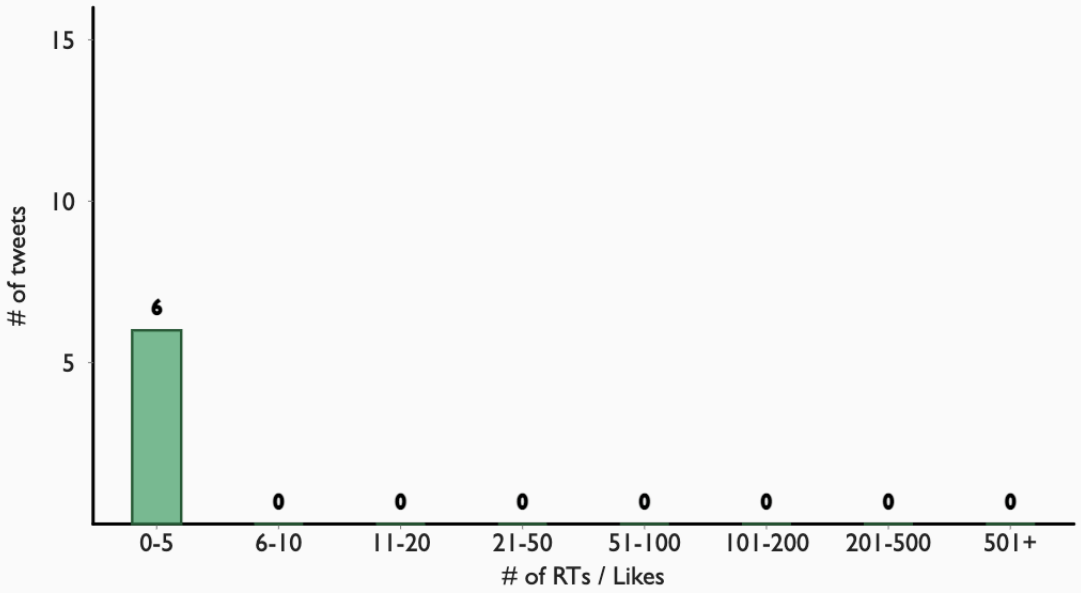
A ratio of the number of people the user follows over the number of followers they have. It accounts for **10%** of the overall Engagement Score.

@HealthBiller has a follow ratio of 0.0000.

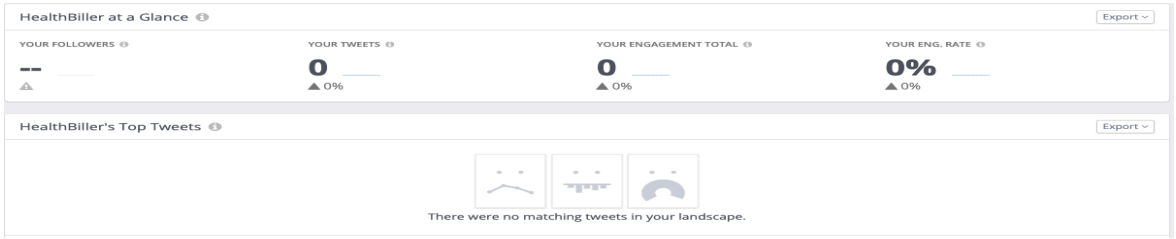
Score: 0.5

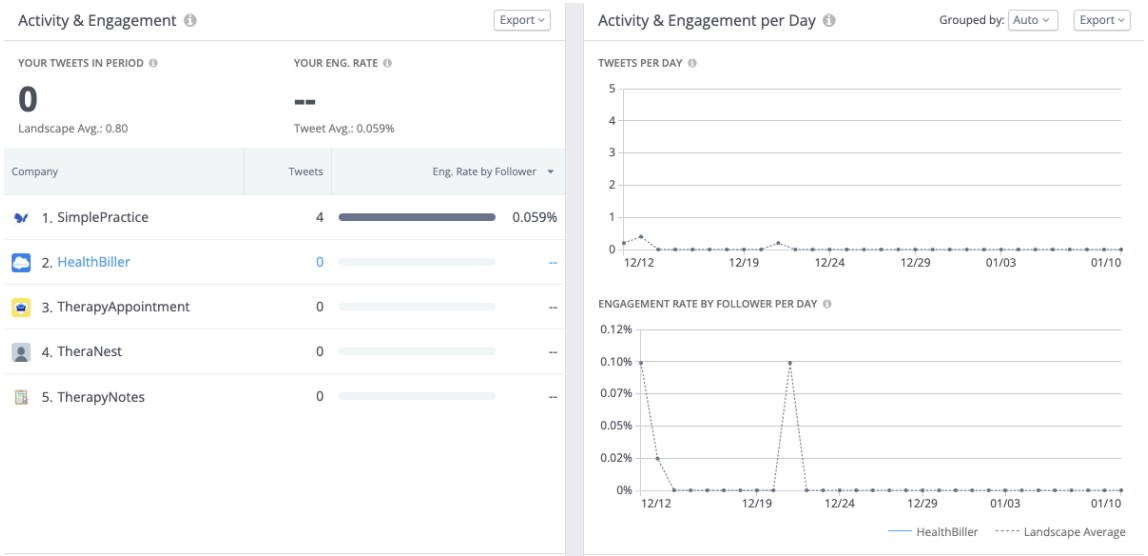
0.6 | 4.47 | 8.34

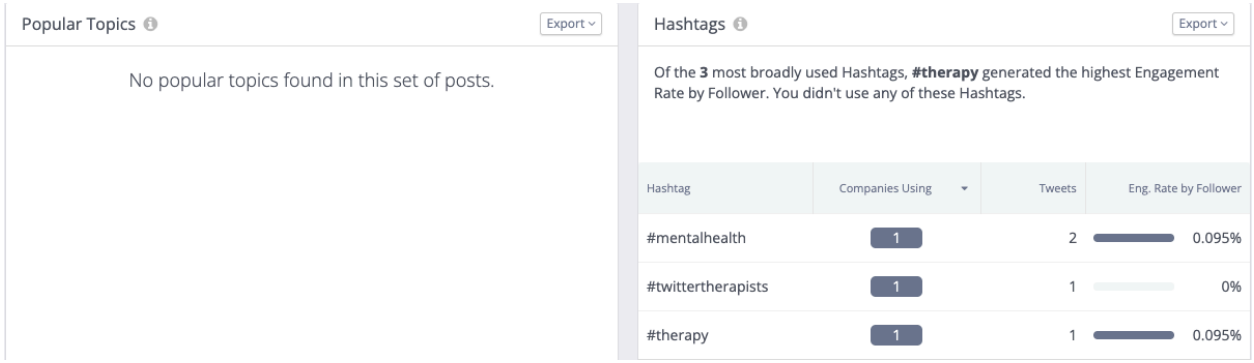
Tweet Performance

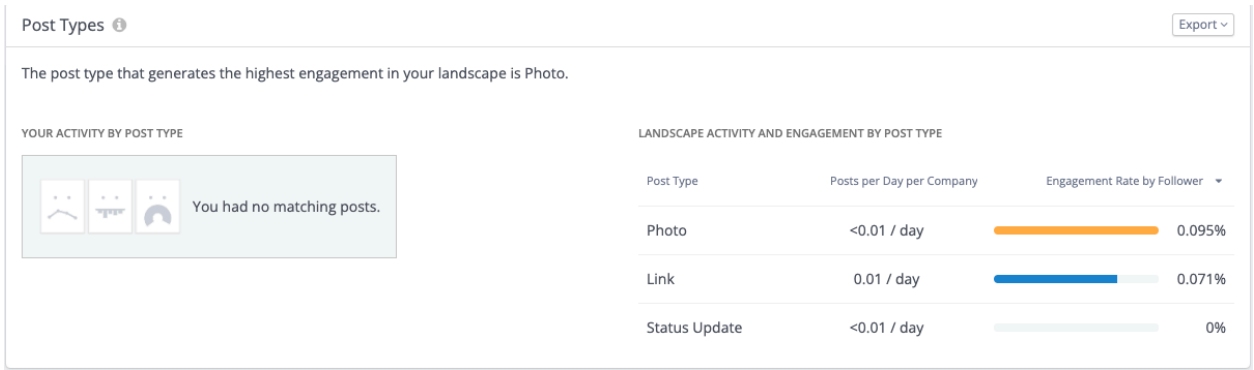


@HealthBiller



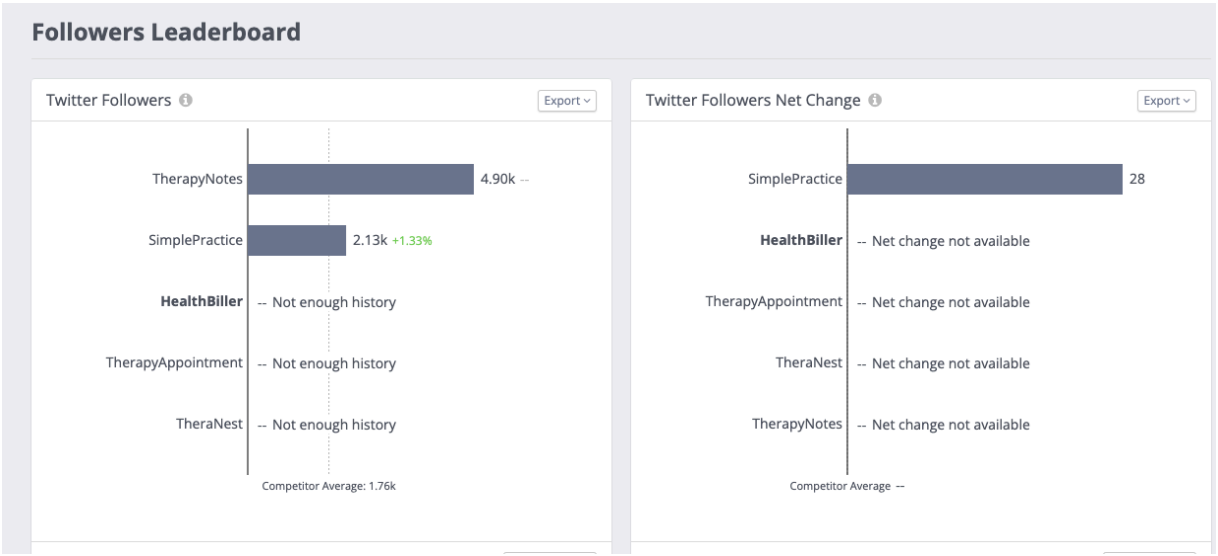




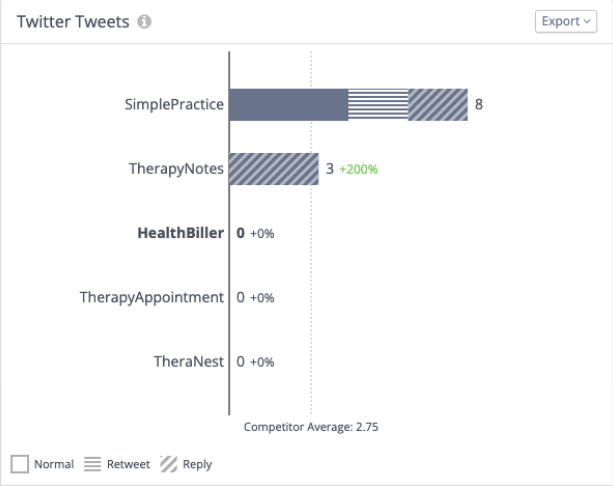


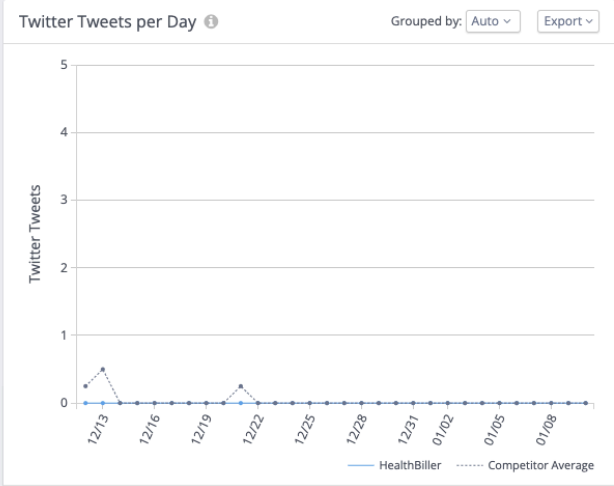


Competitor Analysis (Twitter): @HealthBiller

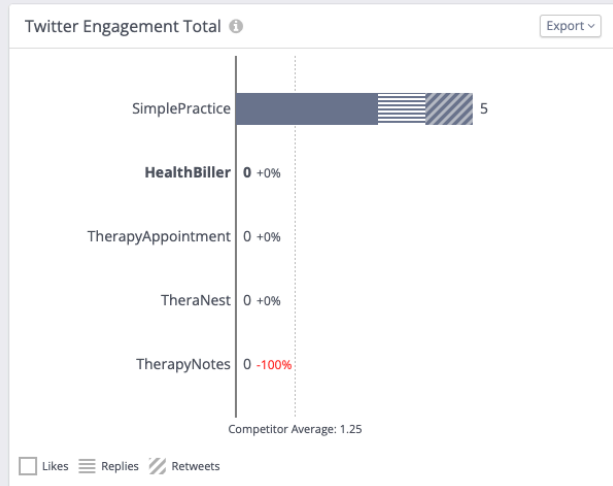


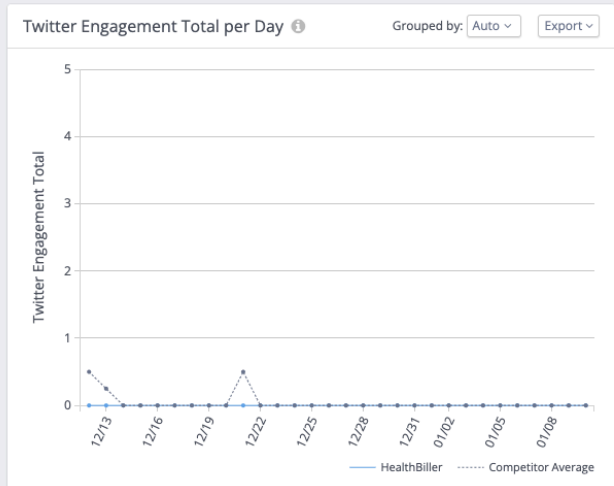
Tweets Leaderboard

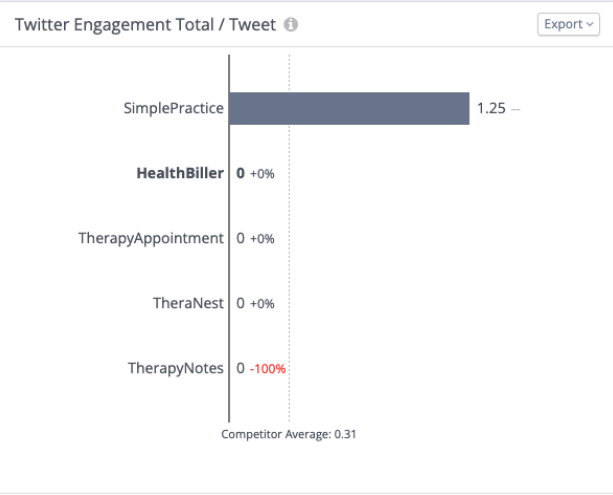


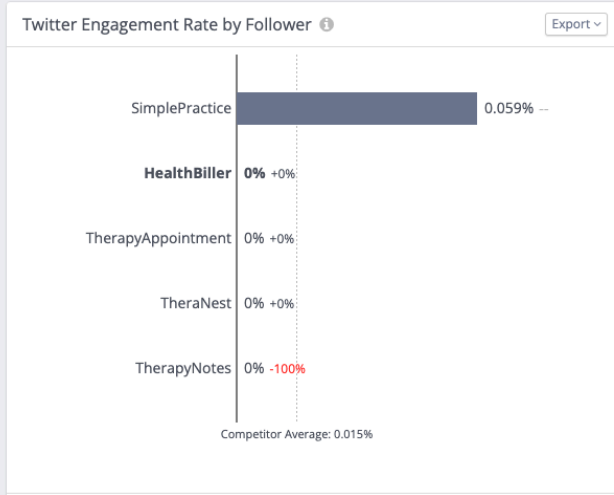


Engagement Leaderboard

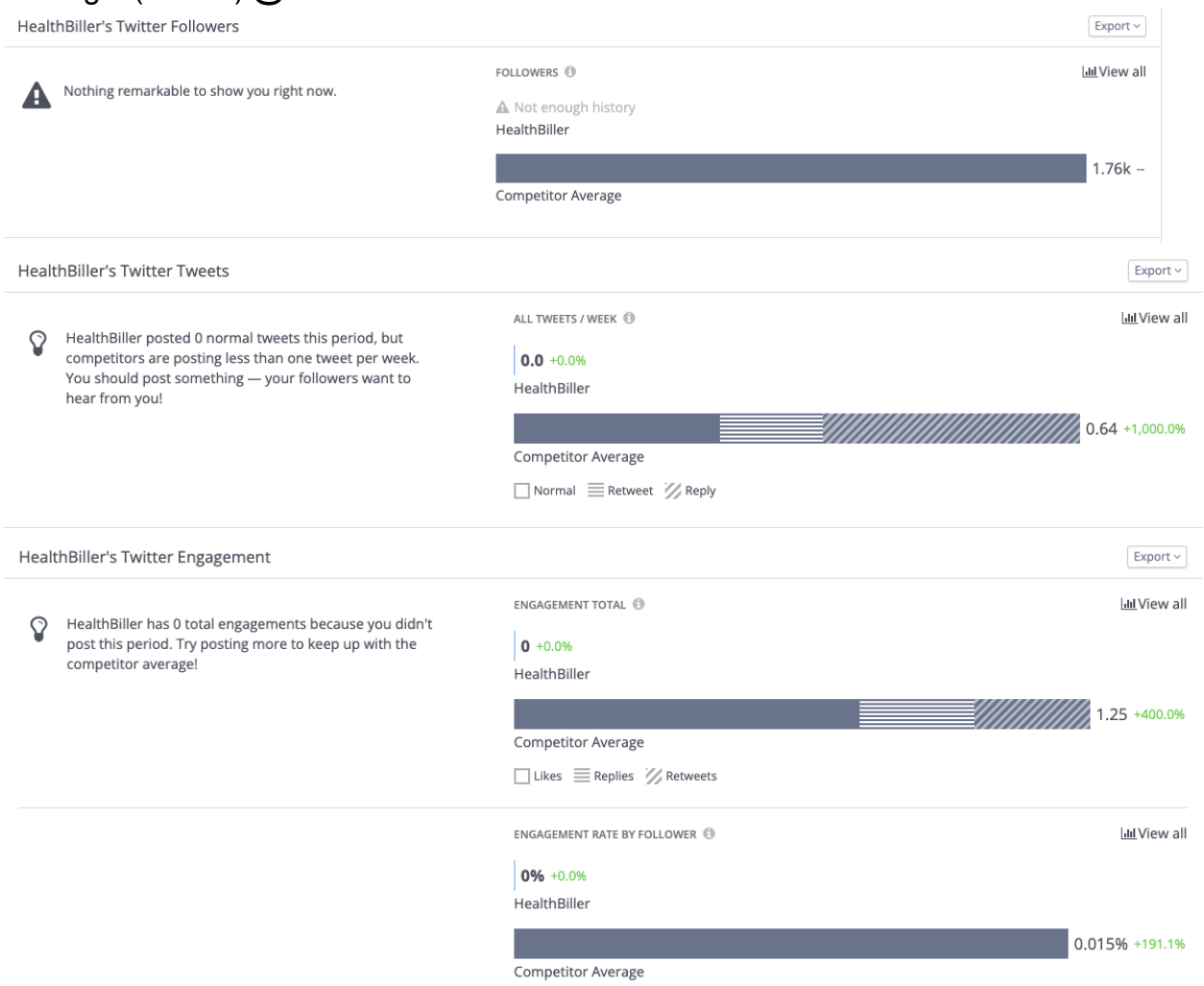








Findings: (Twitter) **@HealthBiller**



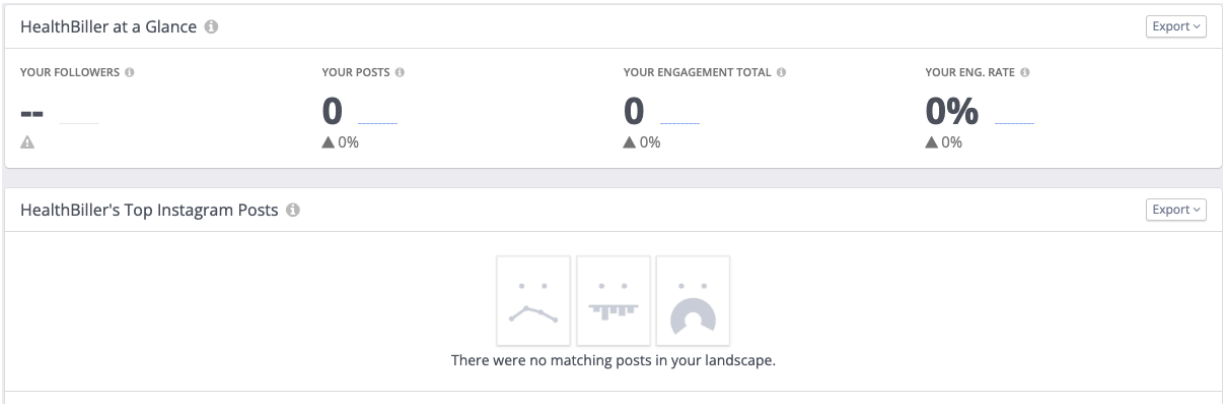
HealthBiller has surrender the Twitter channel to their competitors completely. The good news is that the targeted competitors are not fully taking advantage of the potential Twitter has to offer for a B2B SaaS product. The detailed reporting is mostly to establish a baseline for an ongoing comparison

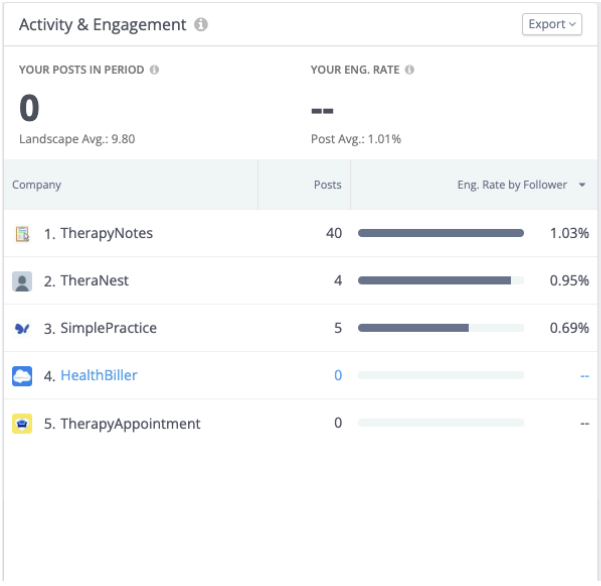
A more detailed findings and recommendation for all of social media will take place at the end of the Social Media section but it is critical to understand the importance of a vibrant Twitter account.

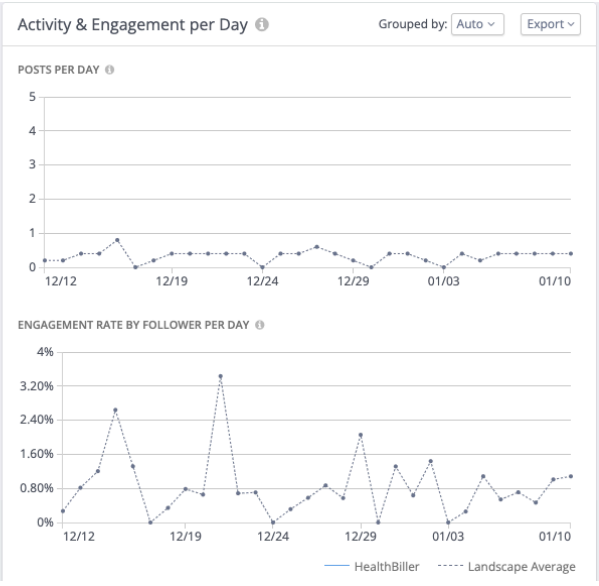
Twitter offers brands a chance to interact more seamlessly with potential customers while providing a thriving advertising space. Twitter users spend 26% more time viewing ads on the platform than on any other social media platform. Two out of three B2B marketers find Twitter the most effective social platform to help their business achieve specific objectives.

Instagram Analysis

NOTE: The software being used requires administrative access to HealthBiller Social Media Accounts to provide more detailed information. If such access is granted the information will be far more accurate and actionable.

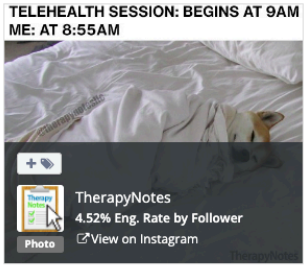




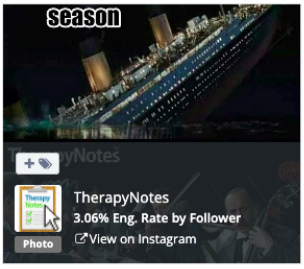


Top Landscape Posts

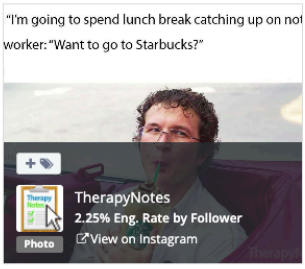
Post Tags: Show | Hide Layout: Grid with Details Sort: Engagement Rate by Follower Export



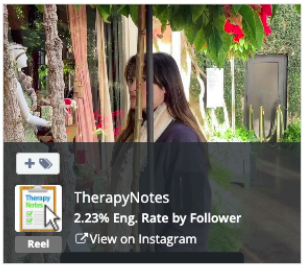
TherapyNotes
4.52% Eng. Rate by Follower
Photo View on Instagram



TherapyNotes
3.06% Eng. Rate by Follower
Photo View on Instagram



TherapyNotes
2.25% Eng. Rate by Follower
Photo View on Instagram



TherapyNotes
2.23% Eng. Rate by Follower
Reel View on Instagram

Popular Topics

Export

No popular topics found in this set of posts.

Hashtags

Export

Of the **8** most broadly used Hashtags, **#WhatsYourWhy** generated the highest Engagement Rate by Follower. You didn't use any of these Hashtags.

Hashtag	Companies Using	Posts	Eng. Rate by Follower
#therapy	2	21	0.57%
#therapist	2	20	0.54%
#ehrsoftware	1	21	1.46%
#ehr	1	21	1.46%
#therapynotes	1	14	1.62%
#privatepracticesuccess	1	14	1.62%
#behavioralhealth	1	14	1.62%
#WhatsYourWhy	1	1	1.63%

Post Types

Export

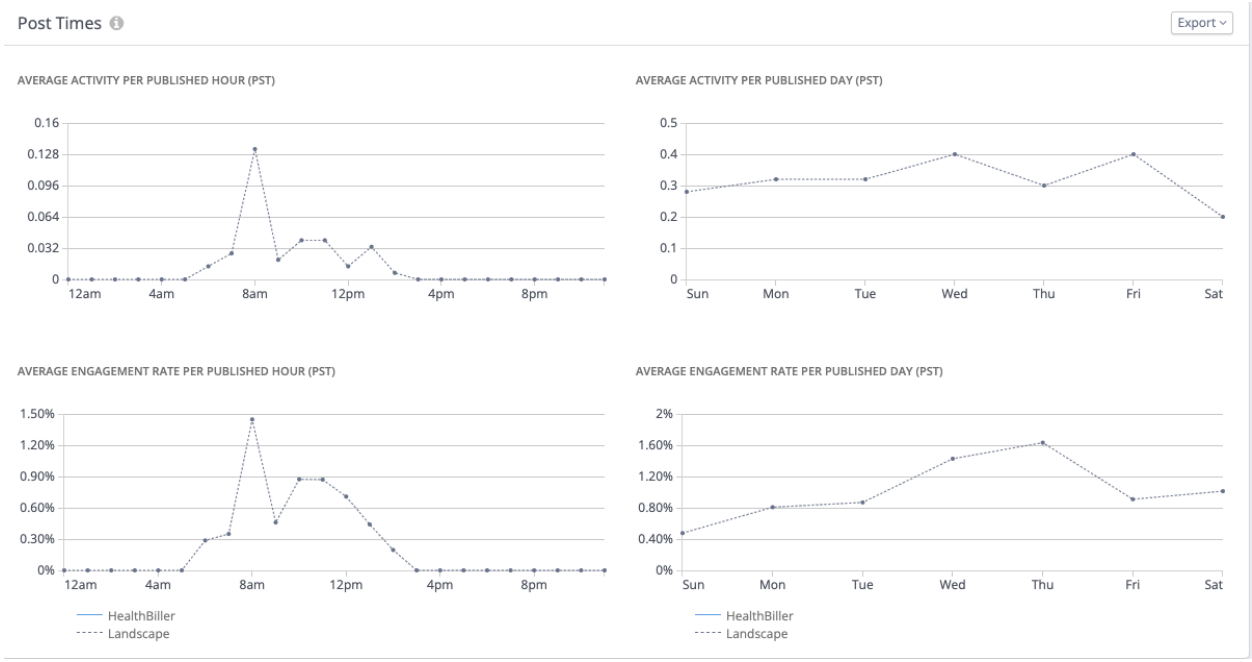
The post type that generates the highest engagement in your landscape is Carousel.

YOUR ACTIVITY BY POST TYPE

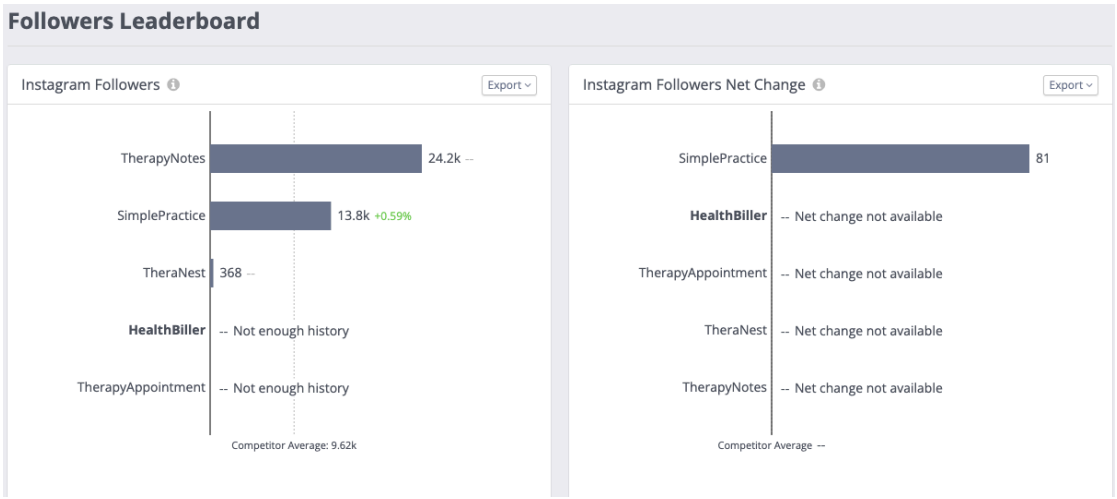
You had no matching posts.

LANDSCAPE ACTIVITY AND ENGAGEMENT BY POST TYPE

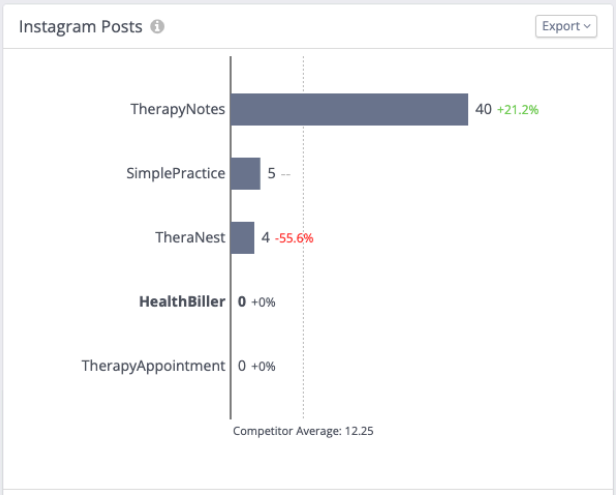
Post Type	Posts per Day per Company	Engagement Rate by Follower
Carousel	<0.01 / day	1.43%
Photo	0.17 / day	1.40%
Reel	0.15 / day	0.54%

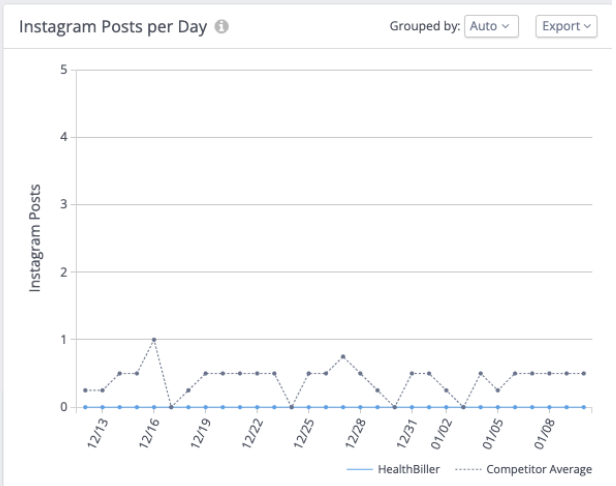


Competitor Analysis (Instagram):

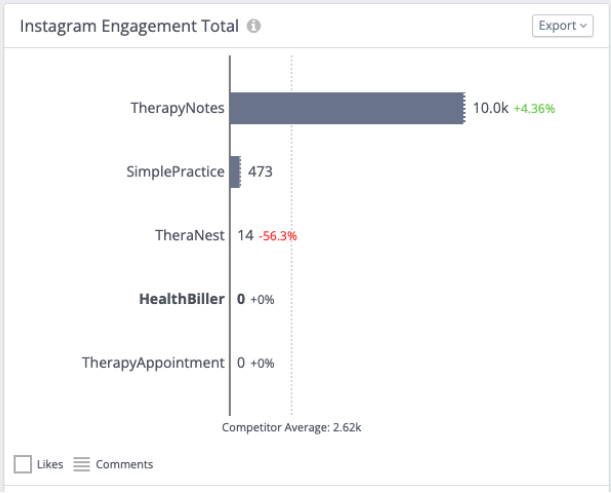


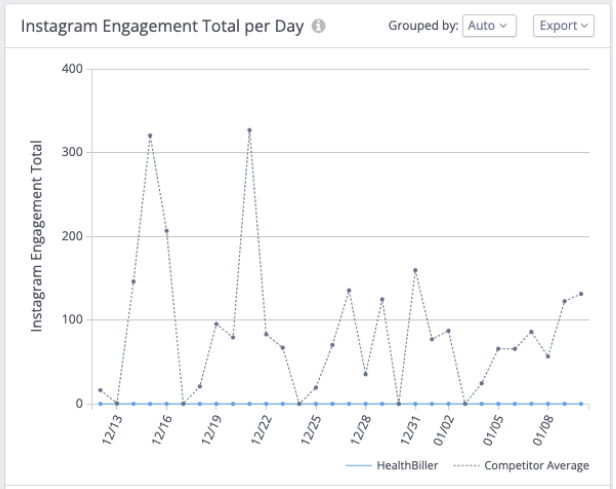
Posts Leaderboard

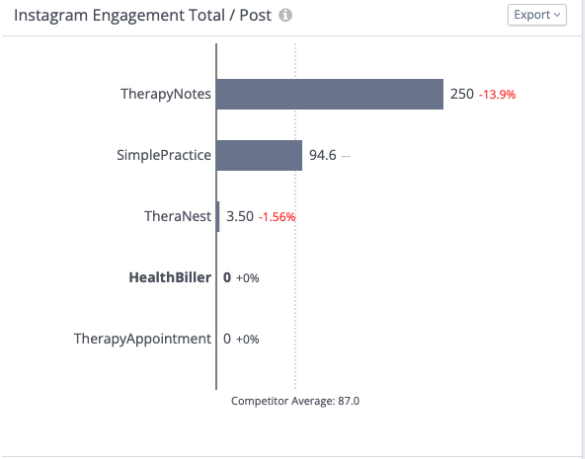


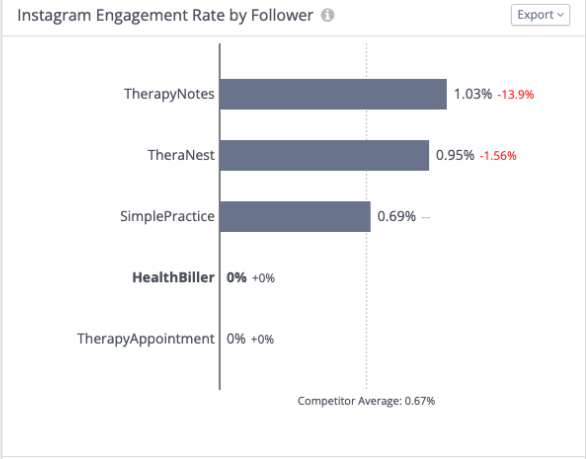


Engagement Leaderboard

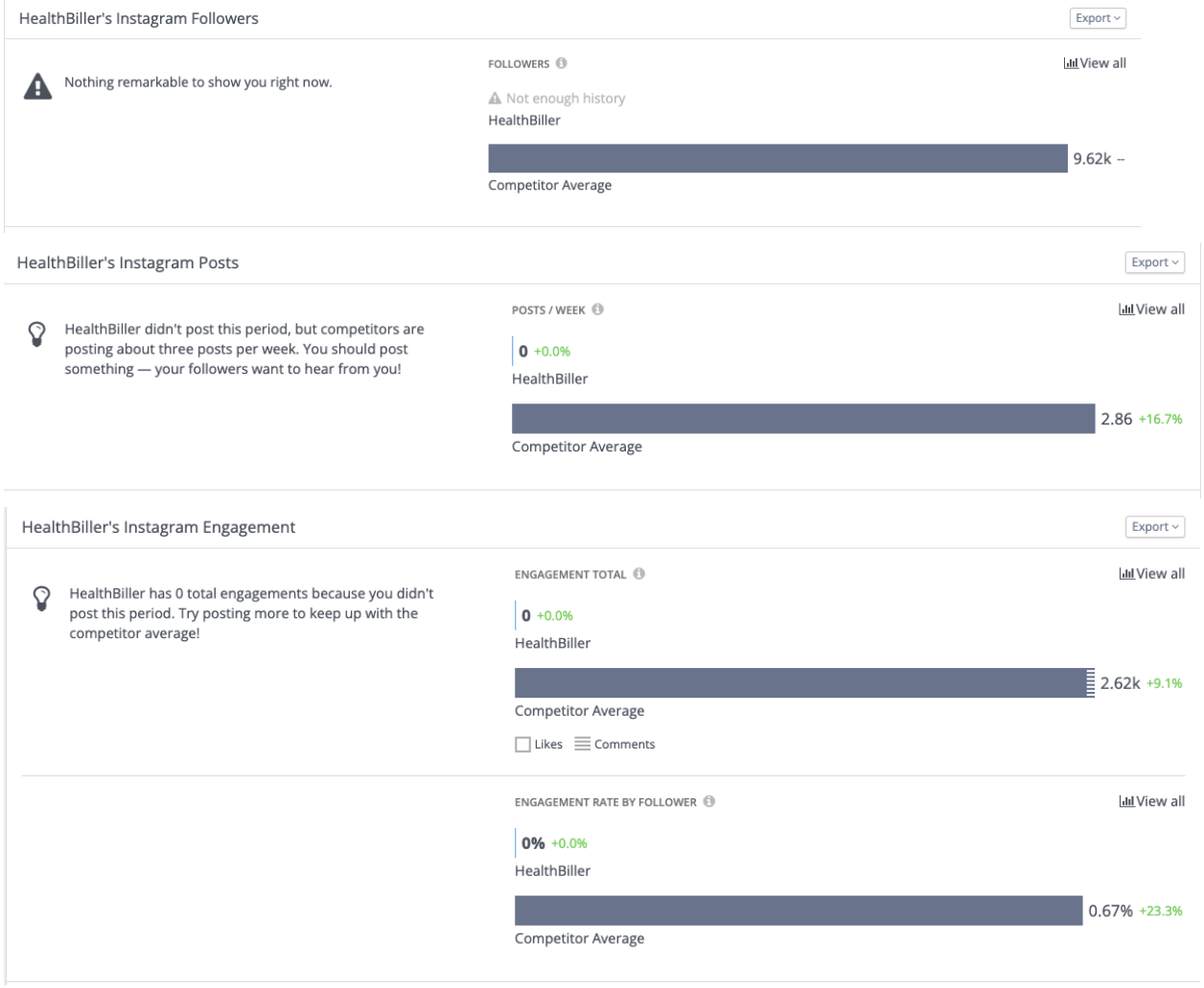








Findings: (Instagram)

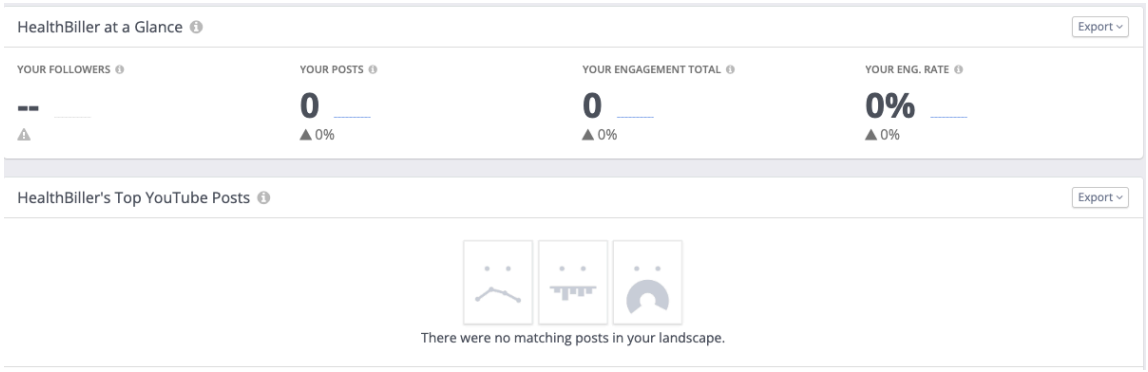


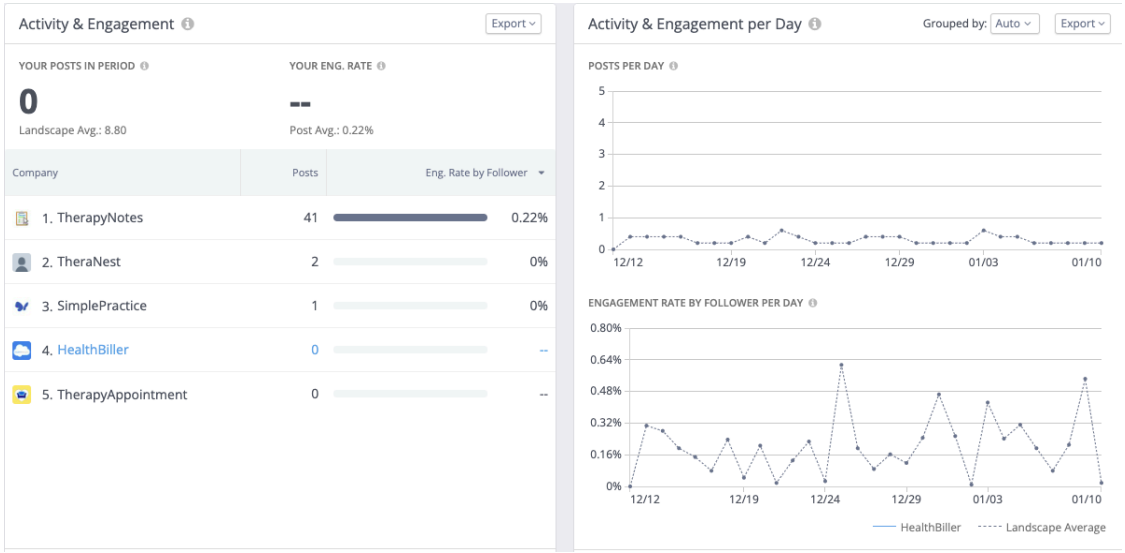
HealthBiller has surrender the Instagram channel to their competitors completely. The good news is that the targeted competitors are not fully taking advantage of the potential Instagram has to offer for a B2B SaaS product. The detailed reporting is mostly to establish a baseline for an ongoing comparison

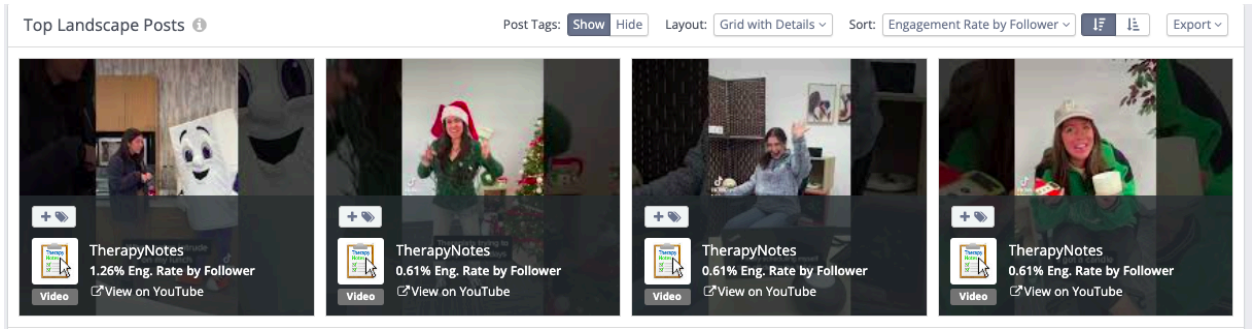
A more detailed findings and recommendation for all of social media will take place at the end of the Social Media section but it is critical to understand the importance of a vibrant Instagram account.
B2B buyers are on Instagram as well, and with the right approach, a digital marketing campaign on this social media platform can be an excellent way to reach them. Instagram is a B2B goldmine. It can help distinguish your brand, build your audience and promote customer loyalty. In short, B2B brands need to be there.

YouTube Analysis

NOTE: The software being used requires administrative access to HealthBiller Social Media Accounts to provide more detailed information. If such access is granted the information will be far more accurate and actionable.







Popular Topics

Export

Of the **8** most broadly used Popular Topics, posts that included **private practice** generated the highest Engagement Rate by Follower. You didn't use any of these Popular Topics.

Topic	Companies Posting	Posts	Eng. Rate by Follower	Views
behavioral health	2	11	0.018%	709
practice management	2	11	0.017%	961
online practice	1	11	0.018%	734
private practice	1	10	0.019%	649
online practice manageme...	1	10	0.018%	705
featuring robust notes	1	10	0.018%	705
additional questions	1	10	0.018%	705
billing features	1	9	0.019%	640

Hashtags

Export

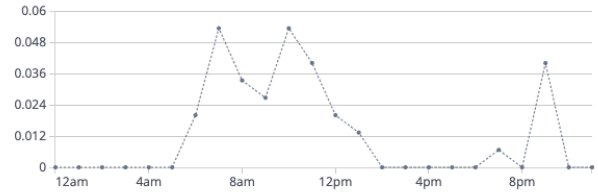
Hashtags didn't generate any engagement during this time period.

Hashtag	Companies Using	Posts	Eng. Rate by Follower
#socialdeterminantsofhealth	1	1	0%
#SimplePractice	1	1	0%
#practicemanagement	1	1	0%
#podcast	1	1	0%
#physicaltherapy	1	1	0%
#occupationaltherapy	1	1	0%
#EMR	1	1	0%
#behavioralhealth	1	1	0%

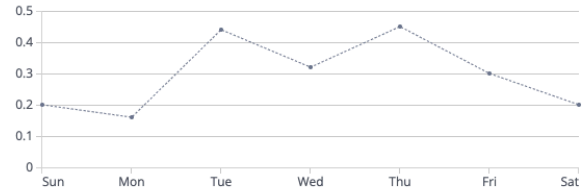
Post Times

Export

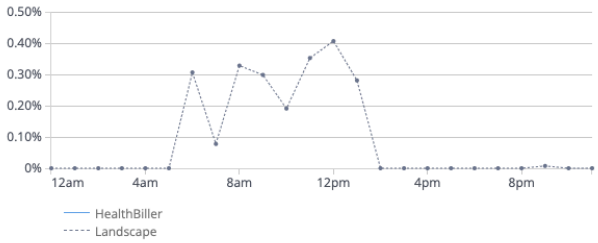
AVERAGE ACTIVITY PER PUBLISHED HOUR (PST)



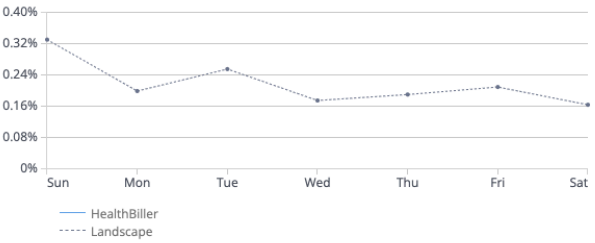
AVERAGE ACTIVITY PER PUBLISHED DAY (PST)



AVERAGE ENGAGEMENT RATE PER PUBLISHED HOUR (PST)

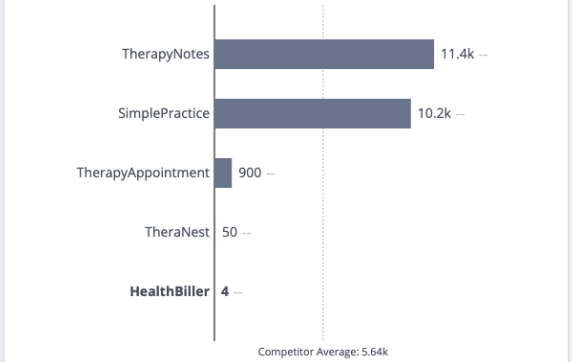


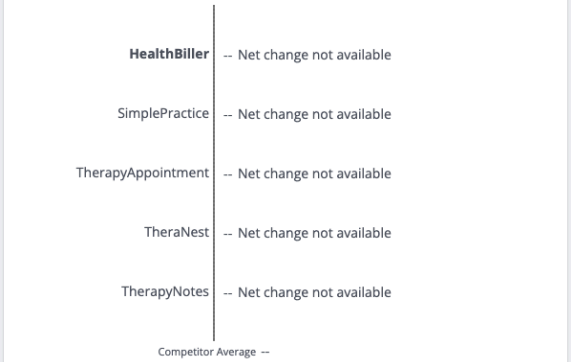
AVERAGE ENGAGEMENT RATE PER PUBLISHED DAY (PST)



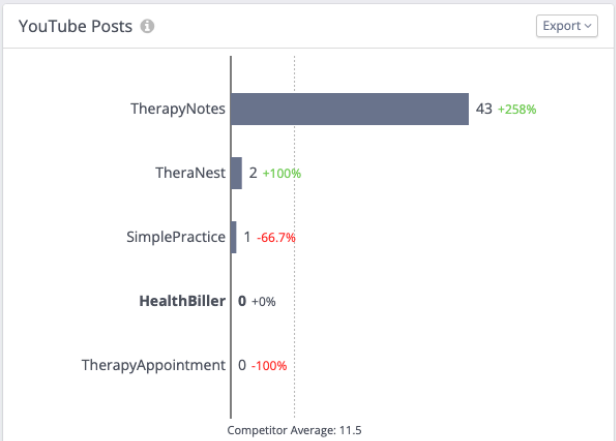
Competitor Analysis (YouTube):

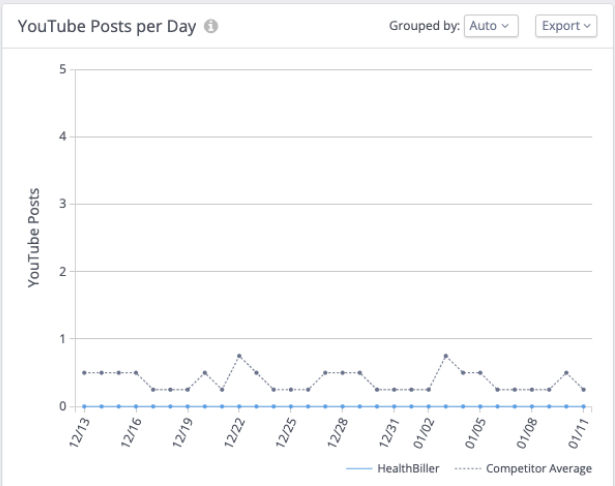
Subscribers Leaderboard



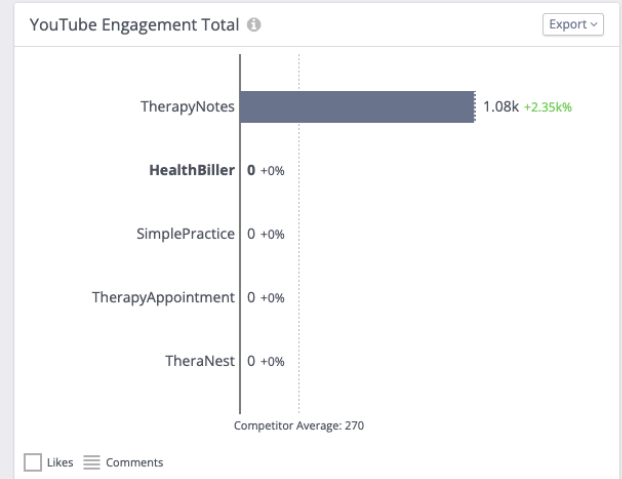


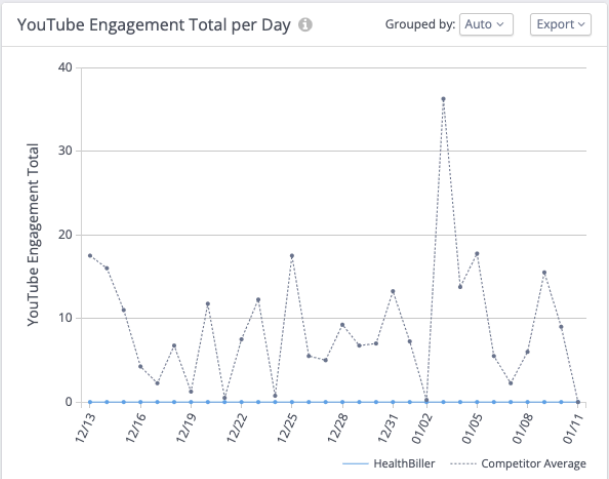
Posts Leaderboard



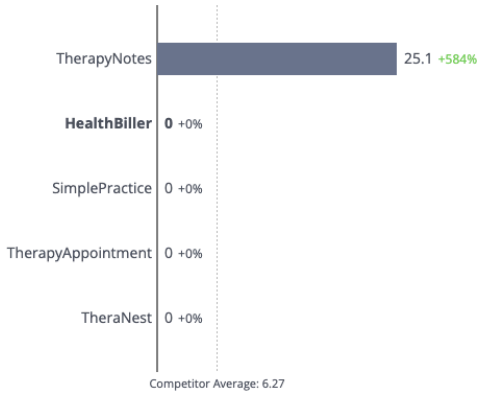


Engagement Leaderboard

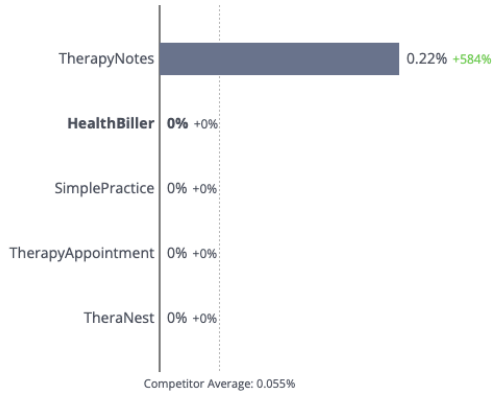




YouTube Engagement Total / Post

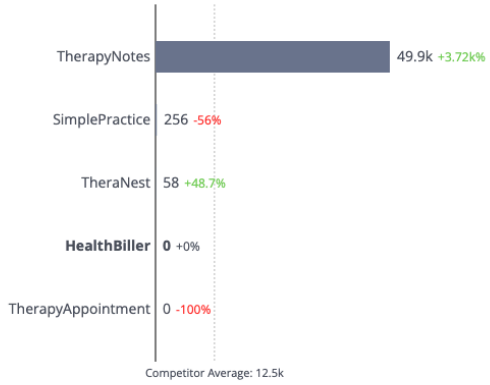


YouTube Engagement Rate by Follower

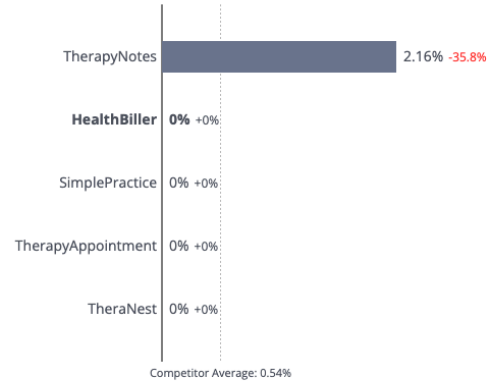


Views Leaderboard

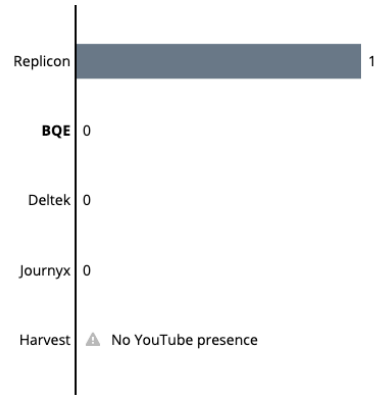
YouTube Views



YouTube Engagement Rate by View

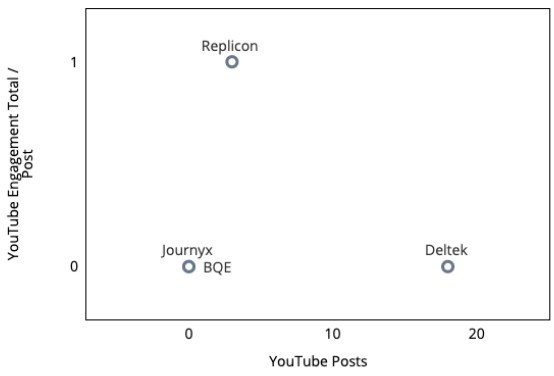


YouTube Engagement Total / Post



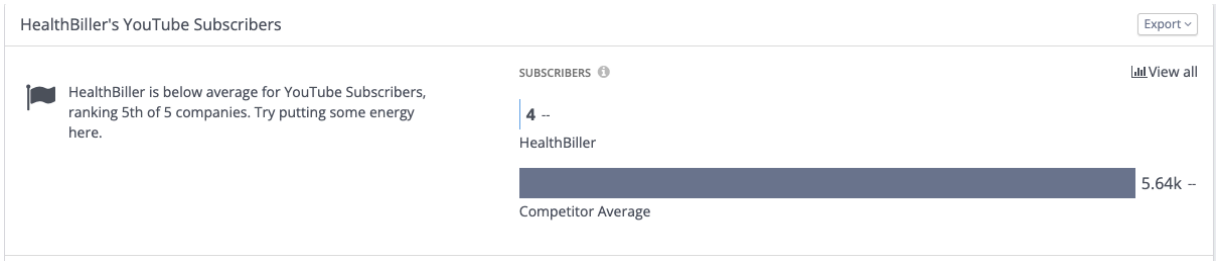
View More

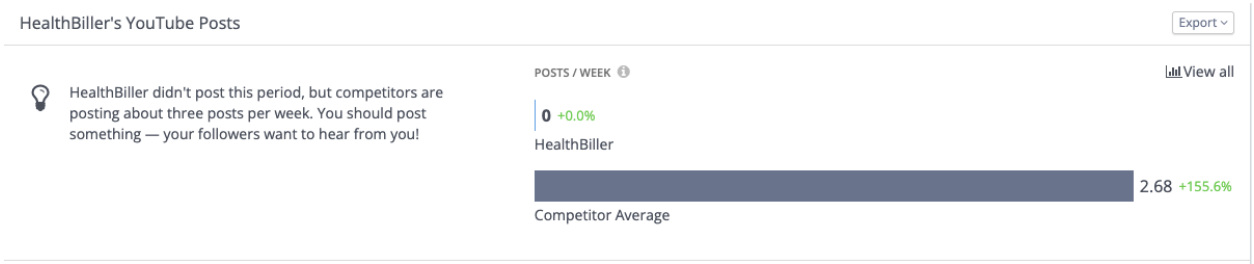
YouTube Posts vs. YouTube Engagement Total / Post

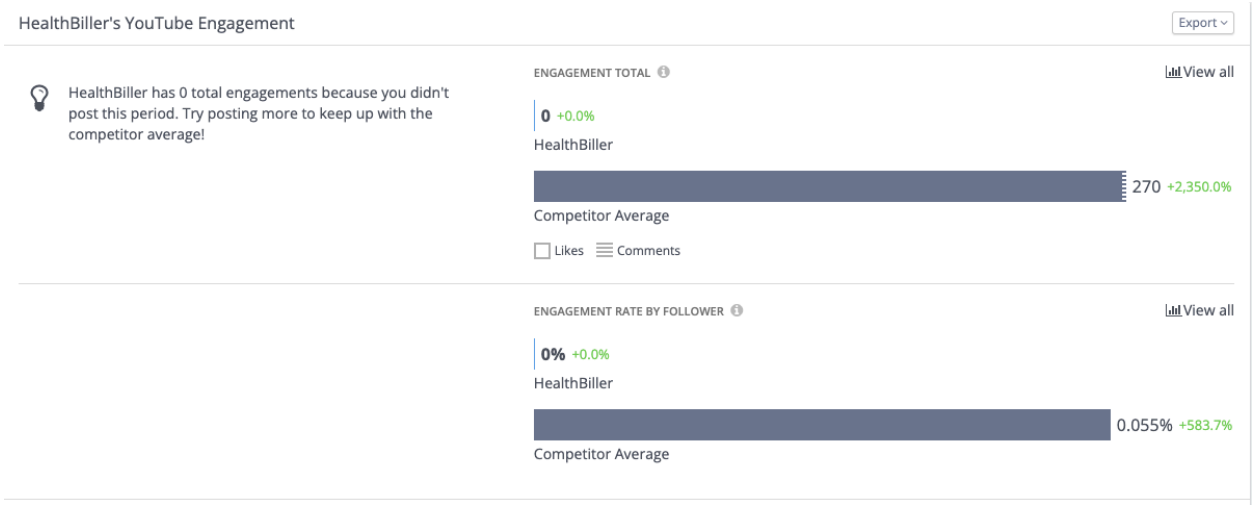


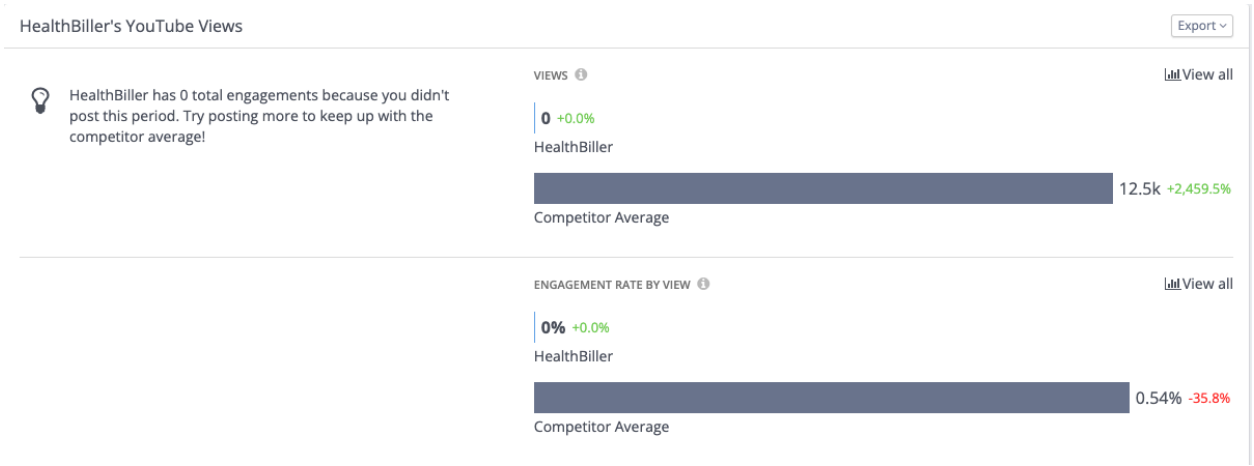
View More

Findings: (YouTube)









HealthBiller has surrender the YouTube channel to their competitors completely. The good news is that the targeted competitors are not fully taking advantage of the potential YouTube has to offer for a B2B SaaS product. The detailed reporting is mostly to establish a baseline for an ongoing comparison

A more detailed findings and recommendation for all of social media will take place at the end of the Social Media section but it is critical to understand the importance of a vibrant YouTube account.

Videos engage both Google to send you targeted traffic and helps those visitors understand and engage. Those companies that utilize videos find that their overall revenue increases by 37% in the first year. Shorter pieces like lifestyle, testimonials, and mini-series spread brand awareness. Longer format tutorials and procedure reviews then build credibility. YouTube's most successful brands will vary video lengths 5x more than less successful brands and publish a variety of video content that targets their personas at each stage of the buyer's journey.

B2B Marketers have discovered videos boost overall customer browsing time by 340% and sales by 37%.

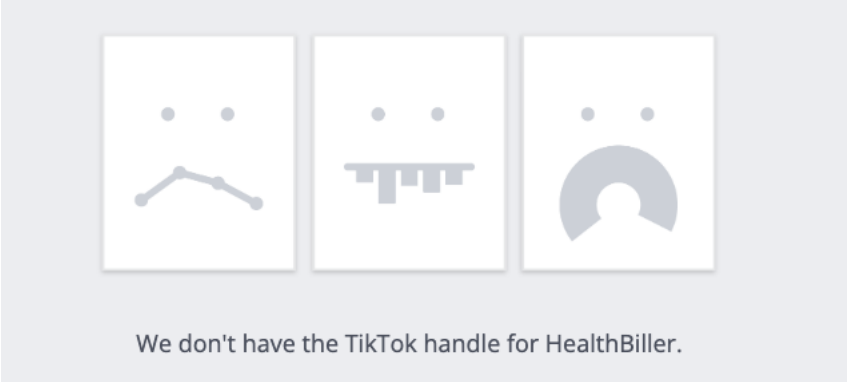
Not convinced that videos are a **POWERFUL** marketing/sales tool. Here are some undisputed facts:

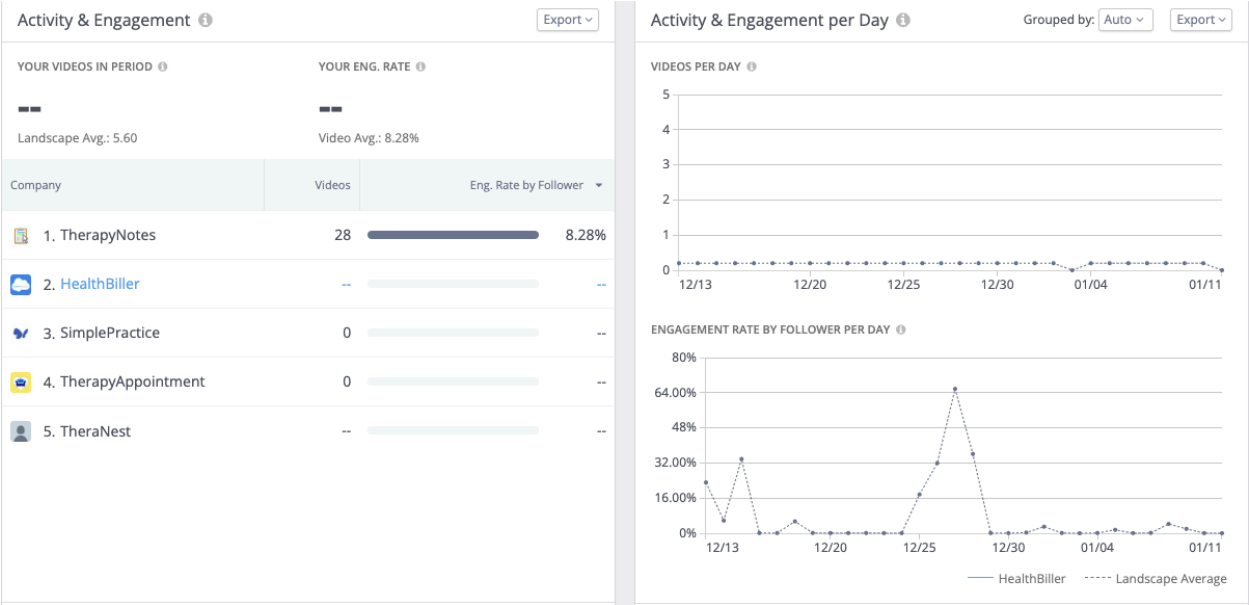
- A Video on your website can increase conversions by 80%! (HubSpot)
- Videos are 4X more likely to be watched than read (Animoto)
- 59% of clients say they prefer video to text (Forbes)
- Videos doubles time-on-page! (MarketingSherpa)
- Videos attract 3X more organic inbound links
- Videos drive 200-300% more unique visits
- Videos increase click through rates through search by 41%
- Videos also deliver your brand personality and trusts



TikTok Analysis

NOTE: The software being used requires administrative access to HealthBiller Social Media Accounts to provide more detailed information. If such access is granted the information will be far more accurate and actionable.





Top Landscape Videos

Post Tags: Show | Hide Layout: List Manage Columns... Export

Published At	Video post		Eng. Total	Eng. Rate by Follower	Views
Dec. 27, 2022 11:36 AM PST	Video	TherapyNotes #therapynotes #therapist #ehr #psychologist View on TikTok		7.17k	65.7%	2.90M
Dec. 28, 2022 12:11 PM PST	Video	TherapyNotes #therapynotes #therapist #ehr #psychologist View on TikTok		3.93k	36.1%	2.90M
Dec. 15, 2022 10:22 AM PST	Video	TherapyNotes #therapynotes #therapist #ehr #psychologist View on TikTok		3.69k	33.8%	1.40M
Dec. 26, 2022 9:54 AM PST	Video	TherapyNotes #therapynotes #therapist #ehr #psychologist View on TikTok		3.48k	31.9%	3.10M

Popular Topics

Export

No popular topics found in this set of posts.

Hashtags

Export

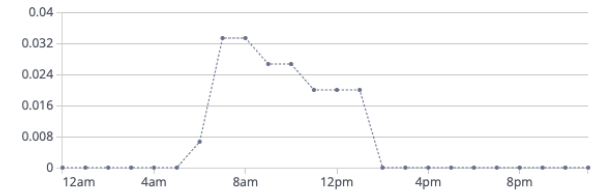
Of the **4** most broadly used Hashtags, **#ehr** generated the highest Engagement Rate by Follower. You didn't use any of these Hashtags.

Hashtag	Companies Using	Videos	Eng. Rate by Follower
#therapynotes	1	28	8.28%
#therapist	1	28	8.28%
#psychologist	1	28	8.28%
#ehr	1	28	8.28%

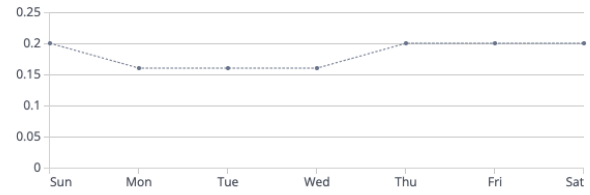
Post Times

Export

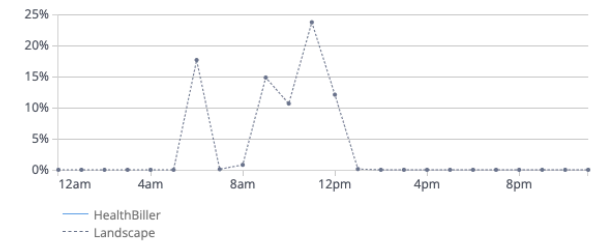
AVERAGE ACTIVITY PER PUBLISHED HOUR (PST)



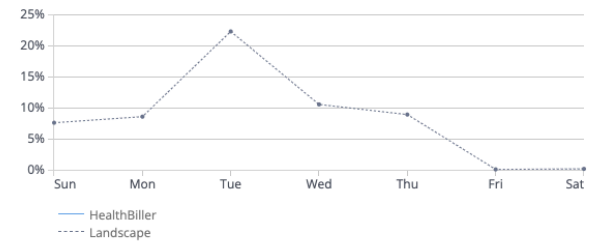
AVERAGE ACTIVITY PER PUBLISHED DAY (PST)



AVERAGE ENGAGEMENT RATE PER PUBLISHED HOUR (PST)

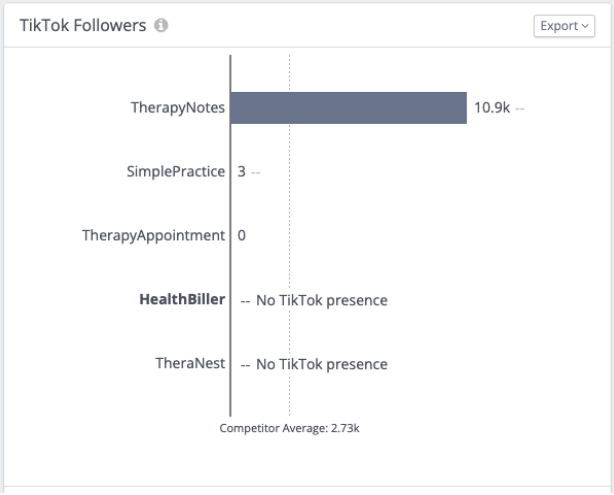


AVERAGE ENGAGEMENT RATE PER PUBLISHED DAY (PST)



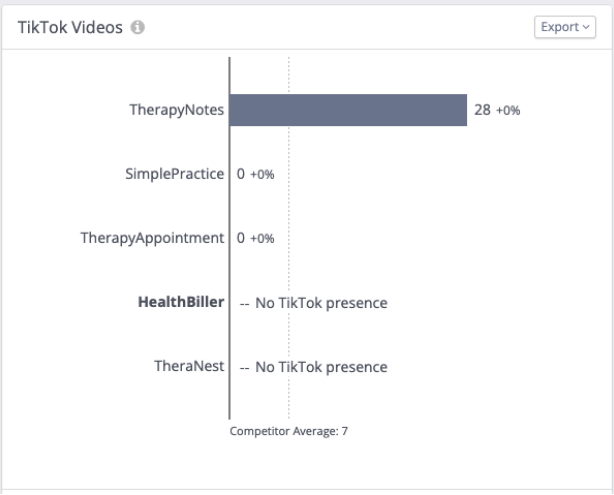
Competitor Analysis (TikTok):

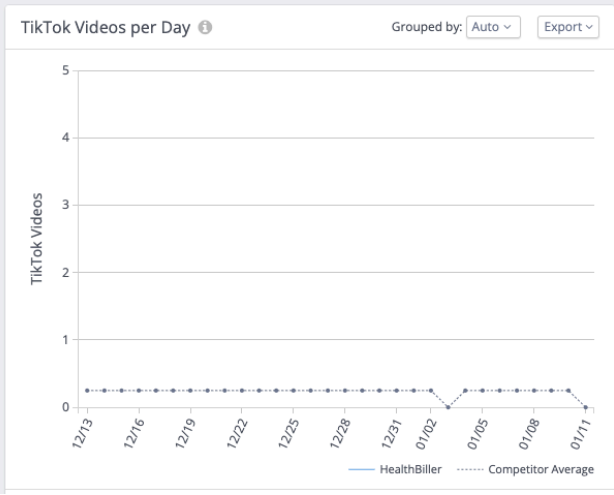
Followers Leaderboard



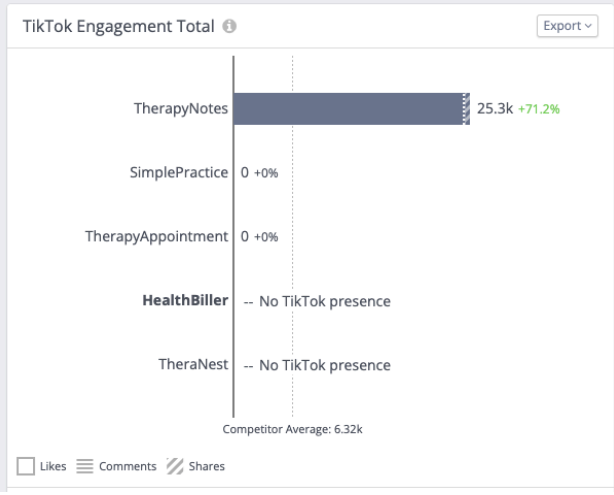


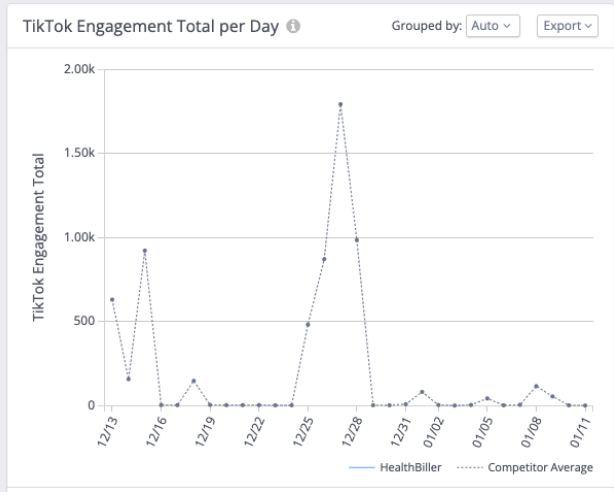
Videos Leaderboard

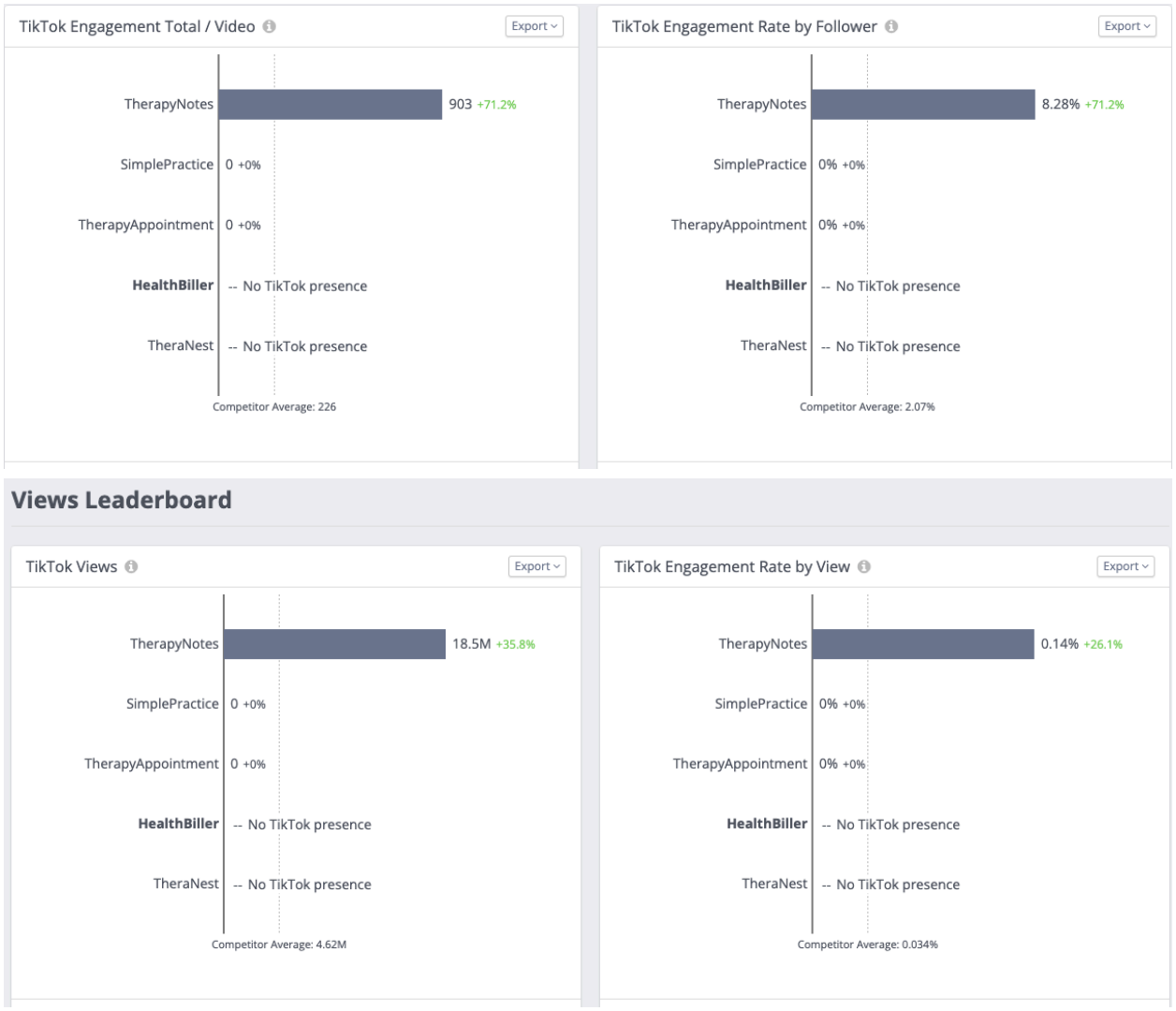




Engagement Leaderboard







Findings: (TikTok)

HealthBiller has surrender the TikTok channel to their competitors completely. The good news is that the targeted competitors are not fully taking advantage of the potential TikTok has to offer for a B2B SaaS product. The detailed reporting is mostly to establish a baseline for an ongoing comparison

A more detailed findings and recommendation for all of social media will take place at the end of the Social Media section but it is critical to understand the importance of a vibrant TikTok account.

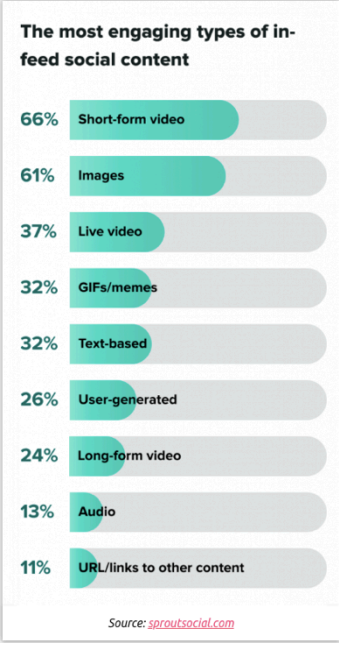
With its focus on short-form videos and its unique take on social media, TikTok offers a way for B2B brands to breathe new life into their social media strategy. It serves as the perfect place to engage and connect with your audience with fun, creative, and relatable content.

It is acceptable to have some fun with your product and TikTok is the perfect forum for that. This doesn't necessarily mean you have to change your entire brand identity only

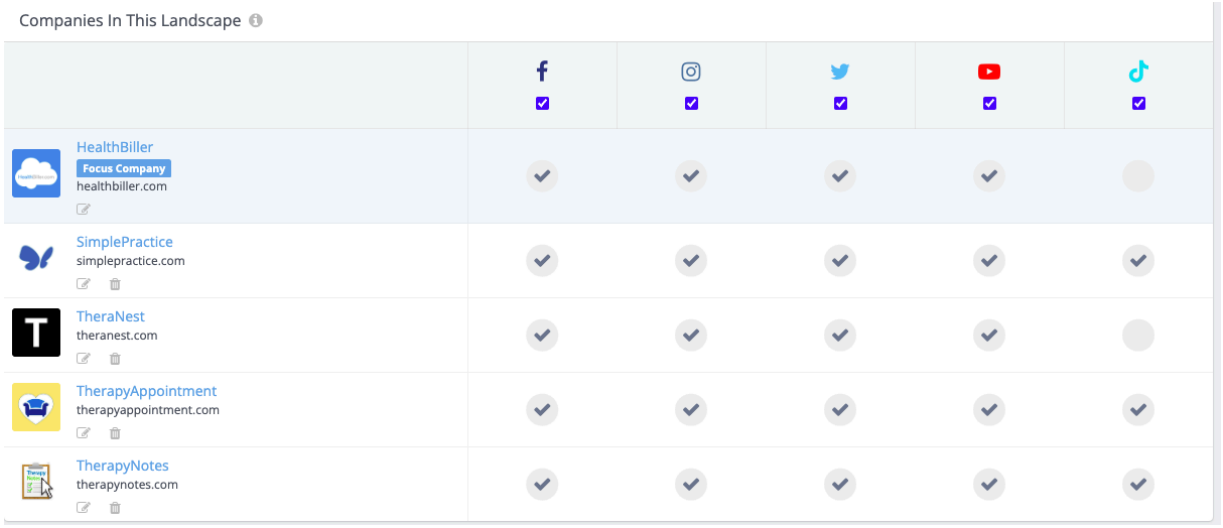
to build a TikTok presence. You only need to look at what other B2B companies are doing on TikTok and what the platform's audience loves.

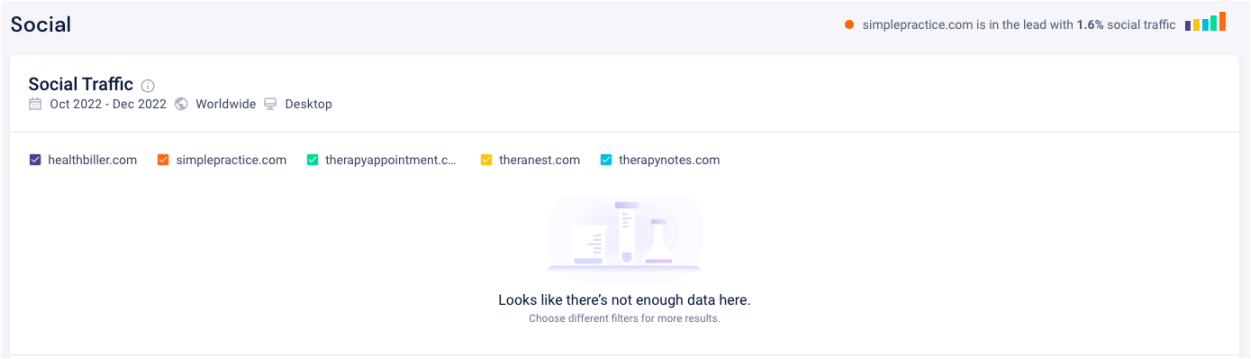
However, an untapped B2B marketing strategy for TikTok is product demos. As much as people love humor on TikTok, many users also love discovering new things and products on the platform. In fact, TikTok is 1.7x more likely than other platforms to be used as a tool for product discovery. And users on the platform are 1.5x more likely to buy something immediately after discovering it on the platform.

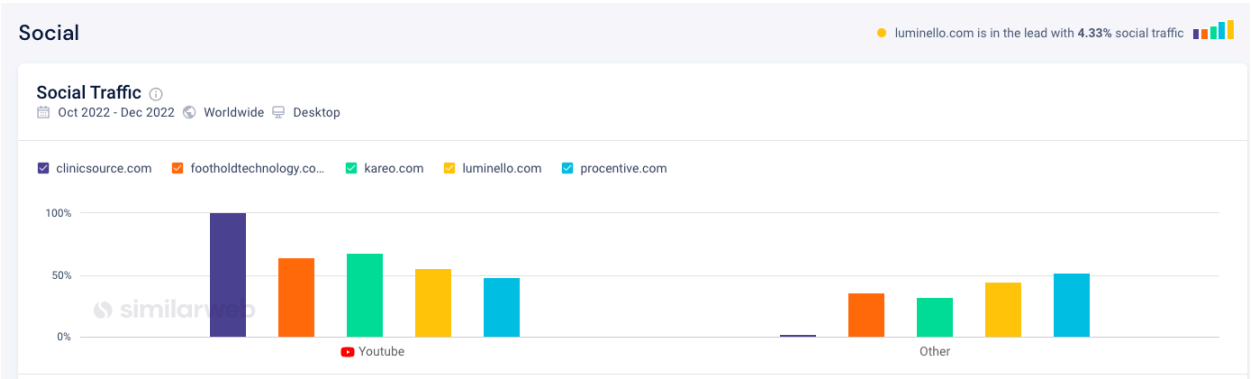
While these numbers may speak for consumers in general, we can't ignore the fact that B2B buyers are still consumers. So, the same rule applies even in case of B2B marketing on TikTok. To tap into the product discovery aspect of the platform, you can use it to showcase demo videos to help people learn more about your product.
This may involve a quick demo of all the features that your product offers. You could also create dedicated videos on how to perform certain tasks using your product



NOTE: The software being used requires administrative access to HealthBiller Social Media Accounts to provide more detailed information. If such access is granted the information will be far more accurate and actionable.







HealthBiller at a Glance

Export

YOUR AUDIENCE	YOUR POSTS	YOUR ENGAGEMENT TOTAL	YOUR MOST ENGAGING CHANNEL
22	0	0	N/A

HealthBiller's Top Posts by Channel

Export

HealthBiller did not publish any posts this period.

Activity & Engagement

Export

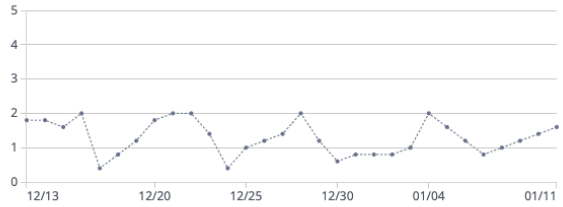
YOUR POSTS IN PERIOD	YOUR ENG. RATE
0	--
Landscape Avg.: 38.8	Post Avg.: 3.32%

Company	Posts	Eng. Rate by Follower
1. TherapyNotes	150	3.43%
2. SimplePractice	13	0.40%
3. TheraNest	31	0.085%
4. HealthBiller	0	--
5. TherapyAppointment	0	--

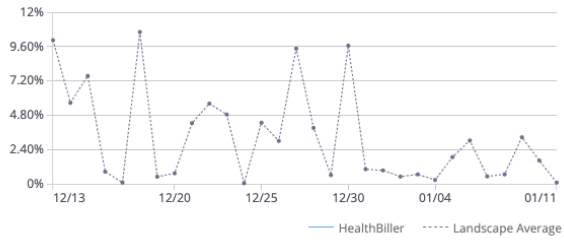
Activity & Engagement per Day

Grouped by: Auto | Export

POSTS PER DAY



ENGAGEMENT RATE BY FOLLOWER PER DAY



Popular Topics

Export

Of the **8** most broadly used Popular Topics, posts that included **practice management** generated the highest Engagement Rate by Follower. You didn't use any of these Popular Topics.

Topic	Companies Posting	Posts	Eng. Rate by Follower
practice management	2	14	0.18%
private practice	2	13	0.033%
behavioral health	2	11	0.018%
mental health	2	7	0.013%
online practice	1	11	0.018%
online practice management ...	1	10	0.018%
featuring robust notes	1	10	0.018%
additional questions	1	10	0.018%

Hashtags

Export

Of the **8** most broadly used Hashtags, **#psychologist** generated the highest Engagement Rate by Follower. You didn't use any of these Hashtags.

Hashtag	Companies Using	Posts Using	Eng. Rate by Follower
#therapist	3	49	3.60%
#ehr	2	52	3.92%
#therapy	2	23	0.56%
#emr	2	23	1.45%
#behavioralhealth	2	17	1.57%
#mentalhealth	2	10	0.41%
#stress	2	4	0.086%
#psychologist	1	28	8.28%

Post Channels

Export

The channel that generates the highest engagement in your landscape is TikTok.

YOUR ACTIVITY BY CHANNEL

You had no matching posts.

LANDSCAPE ACTIVITY AND ENGAGEMENT BY CHANNEL

Post Channel	Posts per Day per Company	Engagement Rate by Follower
TikTok	0.19 / day	8.28%
Facebook	0.45 / day	4.11%
Instagram	0.33 / day	1.03%
YouTube	0.31 / day	0.22%
Twitter	0.03 / day	0.036%

Post Types

Export

The post type that generates the highest engagement in your landscape is Link.

YOUR ACTIVITY BY POST TYPE

You had no matching posts.

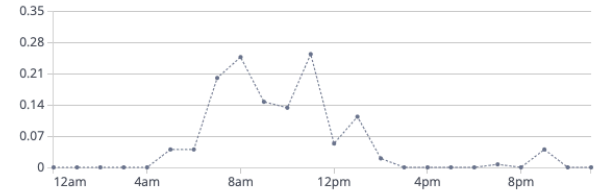
LANDSCAPE ACTIVITY AND ENGAGEMENT BY POST TYPE

Post Type	Posts per Day per Company	Engagement Rate by Follower
Link	0.11 / day	4.12%
Photo	0.50 / day	3.68%
Video	0.53 / day	3.18%
Carousel	<0.01 / day	1.43%
Reel	0.14 / day	0.57%
Status Update	<0.01 / day	0%

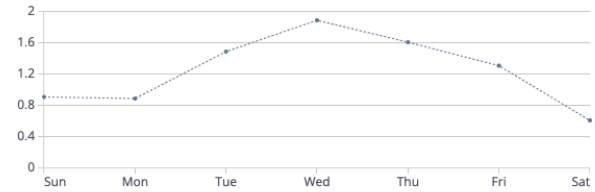
Post Times

Export

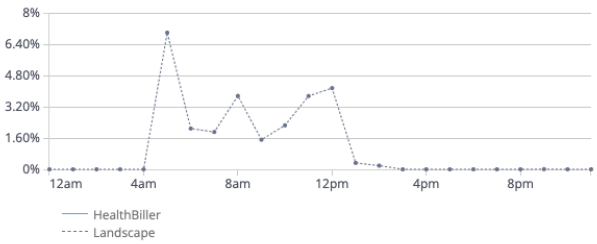
AVERAGE ACTIVITY PER PUBLISHED HOUR (PST)



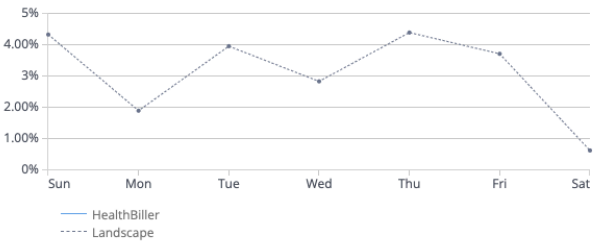
AVERAGE ACTIVITY PER PUBLISHED DAY (PST)



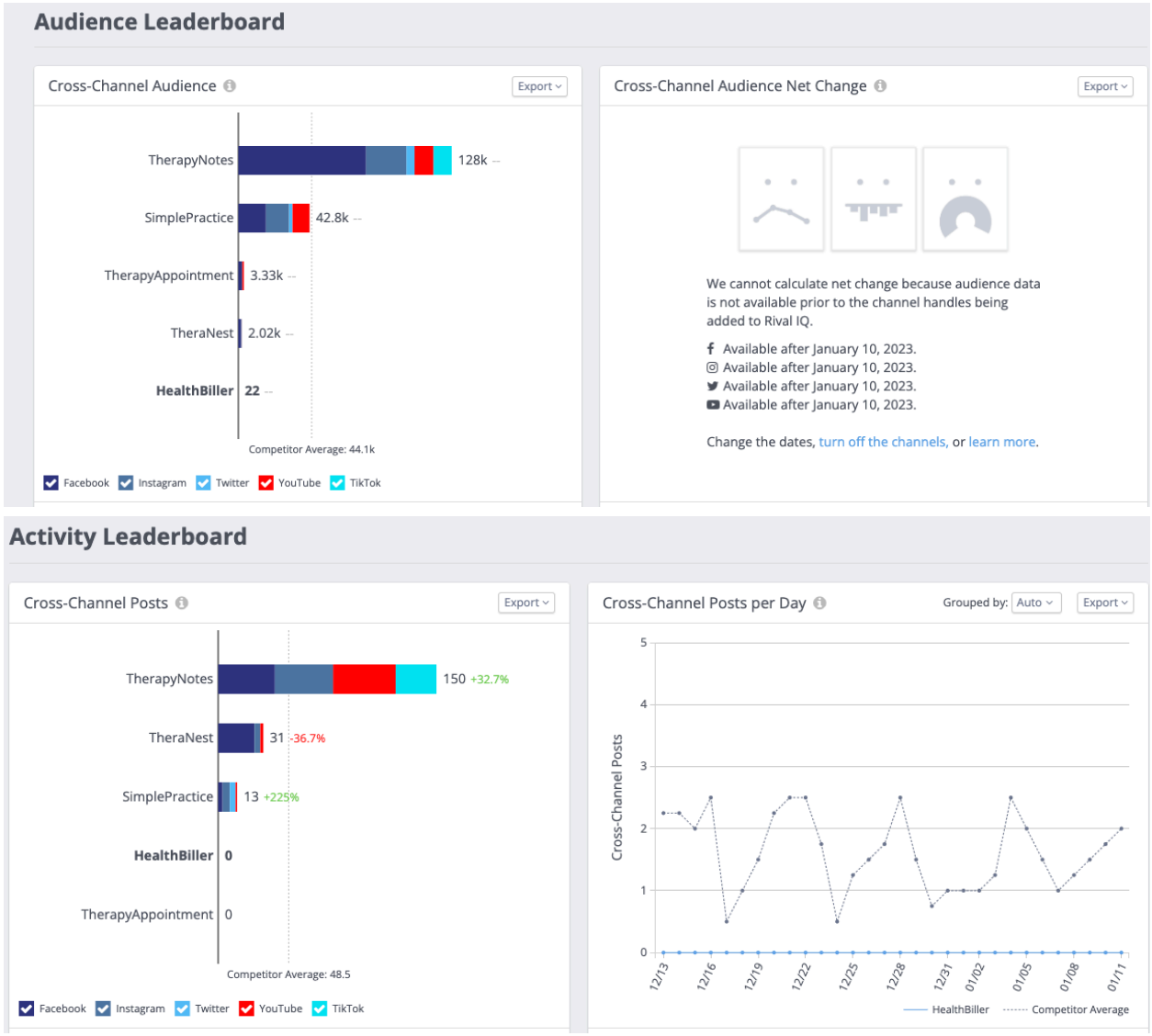
AVERAGE ENGAGEMENT RATE PER PUBLISHED HOUR (PST)

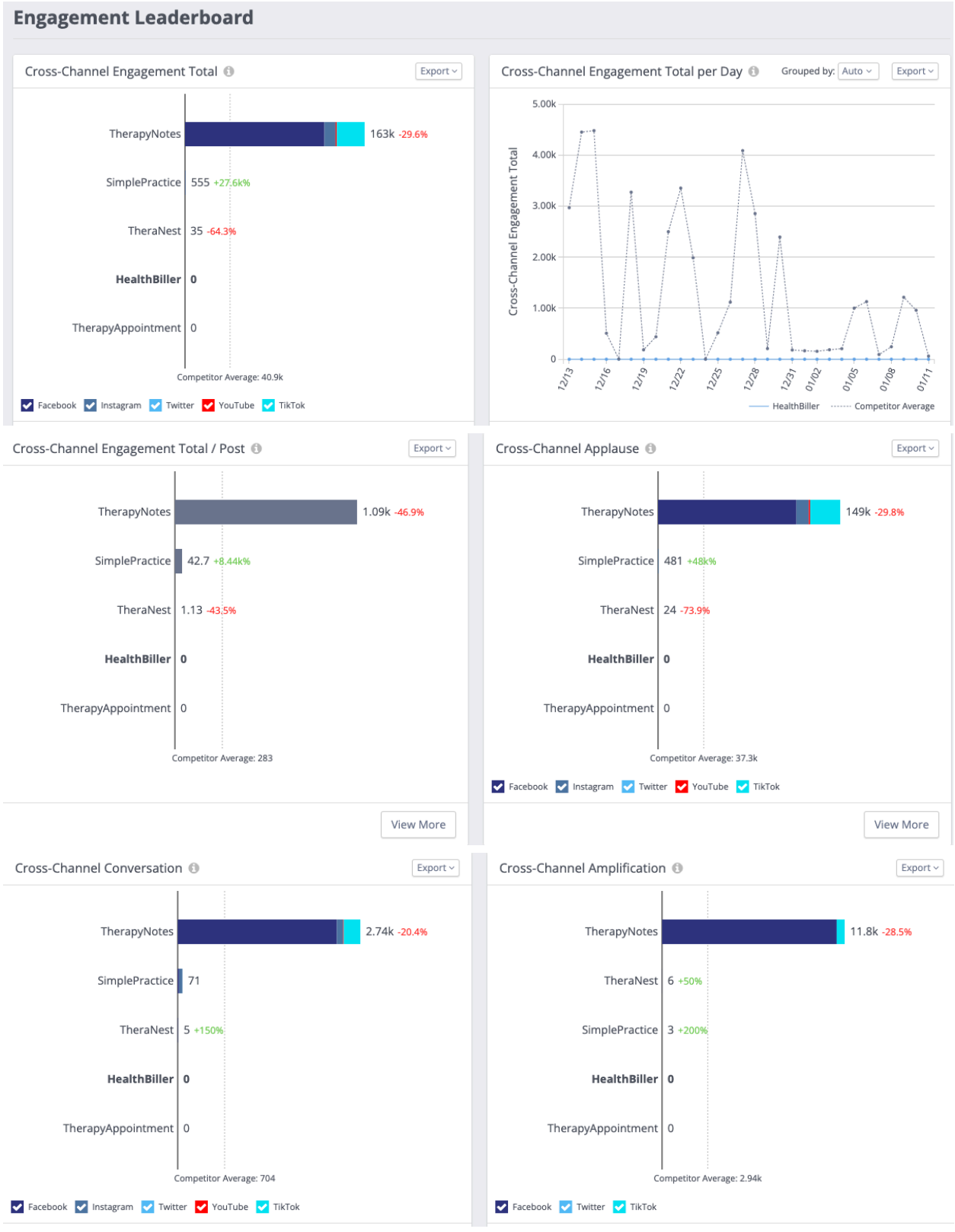


AVERAGE ENGAGEMENT RATE PER PUBLISHED DAY (PST)

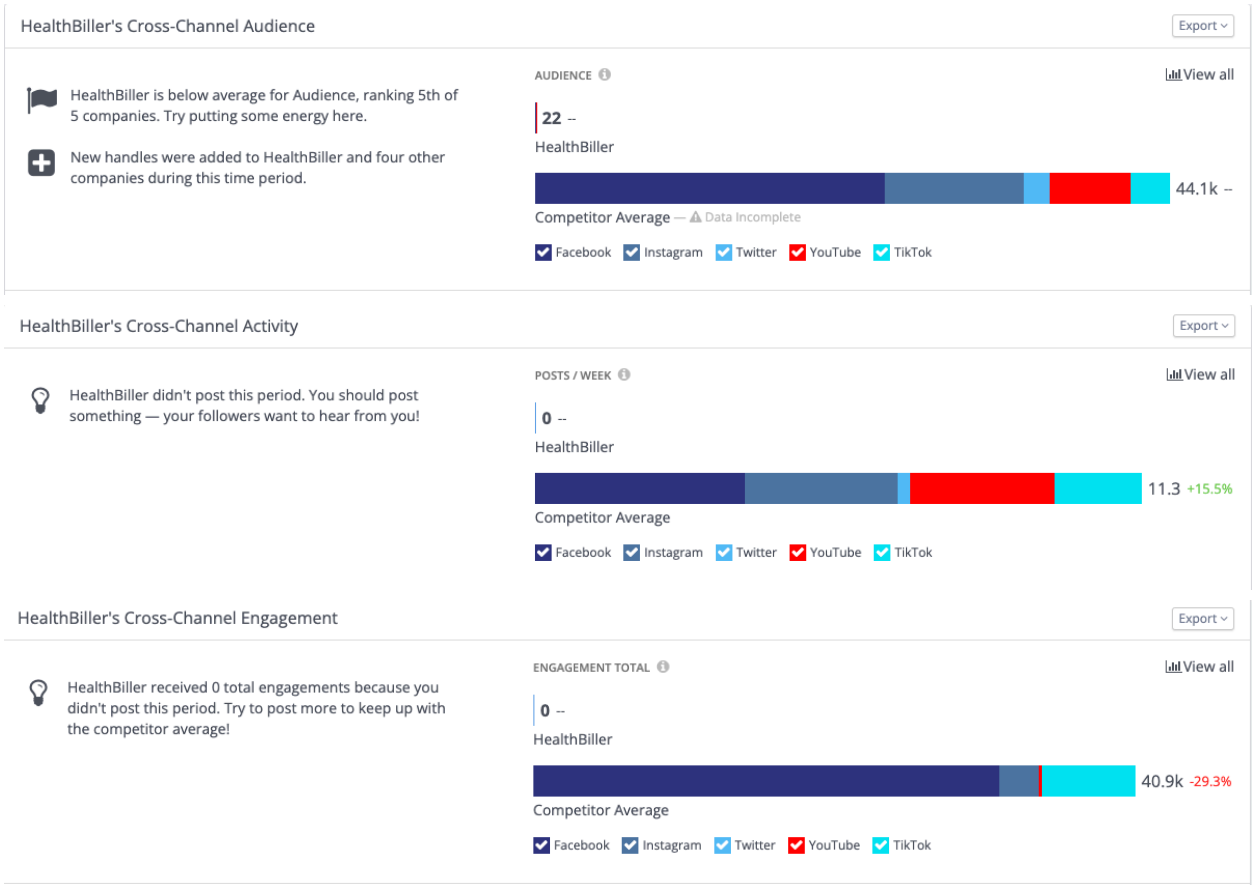


Competitor Analysis (Cross-Channel):





Findings: (Cross-Channel)



LinkedIn Social Analysis

Company	URL	LinkedIn Followers	LinkedIn Post Past 3 Months
HealthBiller	HealthBiller.com	9	0
ClinicSource	clinicsource.com	361	5
Foothold	footholdtechnology.com	4K	28
Kareo	Kareo.com	26K	5
Luninello	Luminello.com	227	15
Procentive (Therapy Brands)	Procentive.com	11K	46
SimplePractice	Simplepractice.com	8K	8
Theraphy Appointment	therapyappointment.com	221	0
TheraNest (Therapy Brands)	TheraNest.com	11K	46
TherapyNotes	Therapynotes.com	23K	74
Valant EHR Suite	Valant.io	5,801	66

There is no real social monitoring or “listening” tools for LinkedIn…at least none that are effective. LinkedIn does not allow 3rd party apps to pull in data from its API that would enable listening in Groups conversations or other posts.

HealthBiller has not taken advantage of the opportunities that LinkedIn presents an ranks at the very bottom of the competitors that were evaluated.

B2B Marketers who post **original content** on LinkedIn have found they benefit from both reputation management and increase sales.

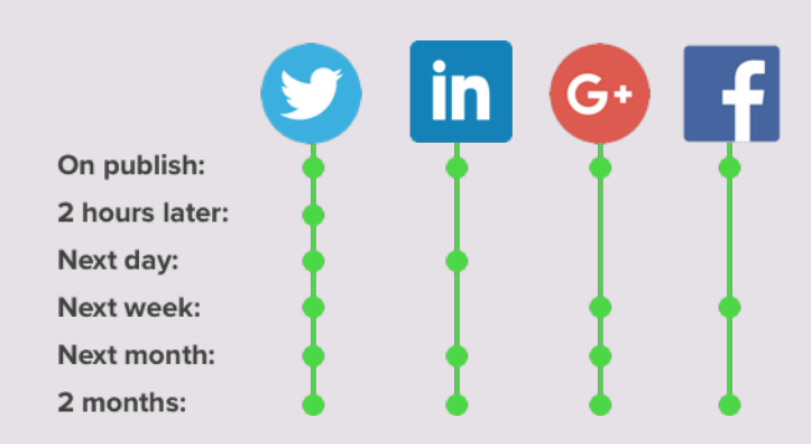
LinkedIn can be highly effective as a means of getting other influencers to share and distribute your content.

Social Media Recommendations

HealthBiller has surrendered all social media channels and influencer marketing to their competitors. HealthBiller is well behind their competition in performance SEO which includes the producing, distributing, and engaging their customers by social media.

HealthBiller needs to social media for content promotion to increase the reach of your marketing efforts. Share and reshare new (and old) blog posts, content offers, and videos on a regular basis.

It is critical to establish a cadence in content promotion on social media can be very effective. While the life of a Tweet, LinkedIn post or Facebook post varies, they all remain short lived— especially Tweets. Don’t be afraid to post the same piece of content multiple times on social media. In fact, it is recommended. Use the chart below as a reference for the posting cadence you should establish whenever a new piece of content is published.



In addition to using social-media channels for content promotion, take the time to find your buyer personas' digital watering hole to generate leads. Answer questions on Quora, share articles on industry-related blogs and forums and focus relentlessly on adding value to the conversations in which you want your company to participate

Cross-Channel Marketing

Social media is a proven and demonstrable tool to maximize brand exposure, educate and inform current and potential customers and drive leads. A proper social media program creates buzz, conveys the qualities of your brand and shortens the sales process.

Facts:

- Businesses are not only spending more time on social media platforms and apps (an average of 12 hours per week, according to We Are Social), they are also spreading their attention across multiple social media platforms. A recent study
- by Global Web Index found that the average internet user now has seven social media accounts, up from only three in 2012.
- Cross channel marketing can help increase brand exposure by boosting a brand's visibility.
- Brand ubiquity, too, plays a role in influencing purchasing decisions; if a consumer see branded or brand-sponsored content on multiple social media channels, this prevalence creates familiarity and fosters trust in audiences.
- Additionally, effective cross channel marketing can help companies maximize each piece of content and enables consumers to interact with the brand on whichever platform they feel comfortable on or loves the most

Why Cross-Channel Social Media is Important

To be clear, we are NOT recommending that HealthBiller create **unique** social content for twitter or any other social channels. We ARE recommending that content created for LinkedIn be repurposed for other social media channels such as Facebook, Twitter, Instagram, and YouTube. Here is the reason for that:

An IAB study found that consumers that view a consistent message across multiple channels increase their purchase intent by 90% and improve their perception of that brand by 68%. An additional benefit on a cost level for brands is that sending out messages across both traditional and digital channels has resulted in a greater return on their marketing investment.

The reason this approach works so well is because consumers use multiple channels when they go through the purchase process, including search engines, brand websites, and customer reviews as well as social media, blog posts, and mobile channels.

Blue Nile Research conducted a research study, entitled, "The Content That Compels People to Buy," and found that more than 70% of those consumers surveyed use three or more channels to research and make a purchase.

Recommendations:

Social Engagement across these channels is one indicator of an effective influencer marketing program. HealthBiller consistently ranks at the bottom across all social media platforms.

HealthBiller needs to tests these channels for a minimum of 6 months to see if there is engagement and sales that can be attributed to them.

LinkedIn should be one of the primary social platforms for sharing all blogs, events, awards, eBooks, Infographics, and videos. The initial sharing should then be amplified by key executives, and marketing/sales leaders.

Every Blog, eBook, webinar, product release, or significant event needs to be shared on Twitter, Instagram, and Facebook.

Paid Social Media Engagement

Social is no longer just about conversation and content; it's now an established channel for customer acquisition, remarketing and engaging b2b existing customers as well as an excellent way to support retention programs.

You don't need to pay to share, but you do need an audience. When first starting out, you'll have few people to talk to via social, so the relative impact of your content will be low.

Do b2b clients buy from social content/offers?

- Research revealed 64% of b2b respondents use social to identify or buy a business solution. They ads were targeted to find them as they were going through their personal feeds.
- Nearly half (46%) of social media users are already using social platforms while thinking about making a purchase.
- 40% of users are actively deciding what to buy based on what they have seen on social media platforms, including reviews and recommendations, and this is only set to grow.

The key to using paid campaigns is to reinforce core messages that you've shared via organic posts.

Recommendations:

HealthBiller should predominately generate social media traffic through organic means, however, there are three occasions where they should consider paid advertisement.

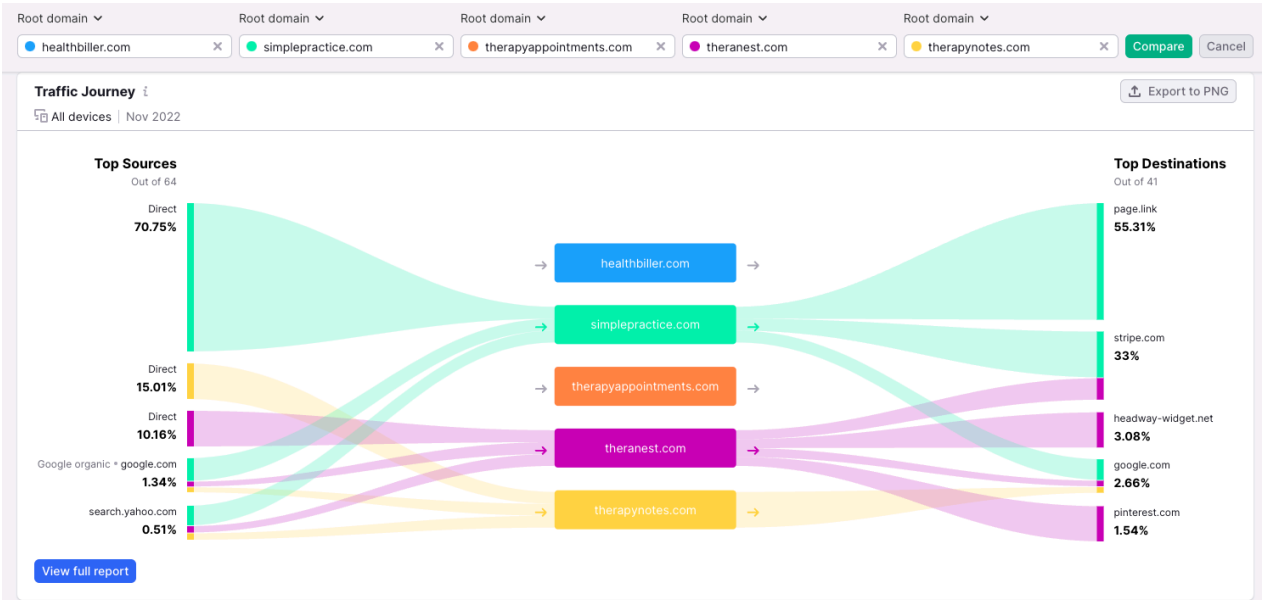
Amplification: Amplification should be used when HealthBiller creates a compelling piece of premium content or a blog that seems to resonate with the targeted personas. The cost is minimal but a few hundred dollars to promote a piece of quality content on social platforms and paid keywords. This can deliver new and highly targeted eyes.

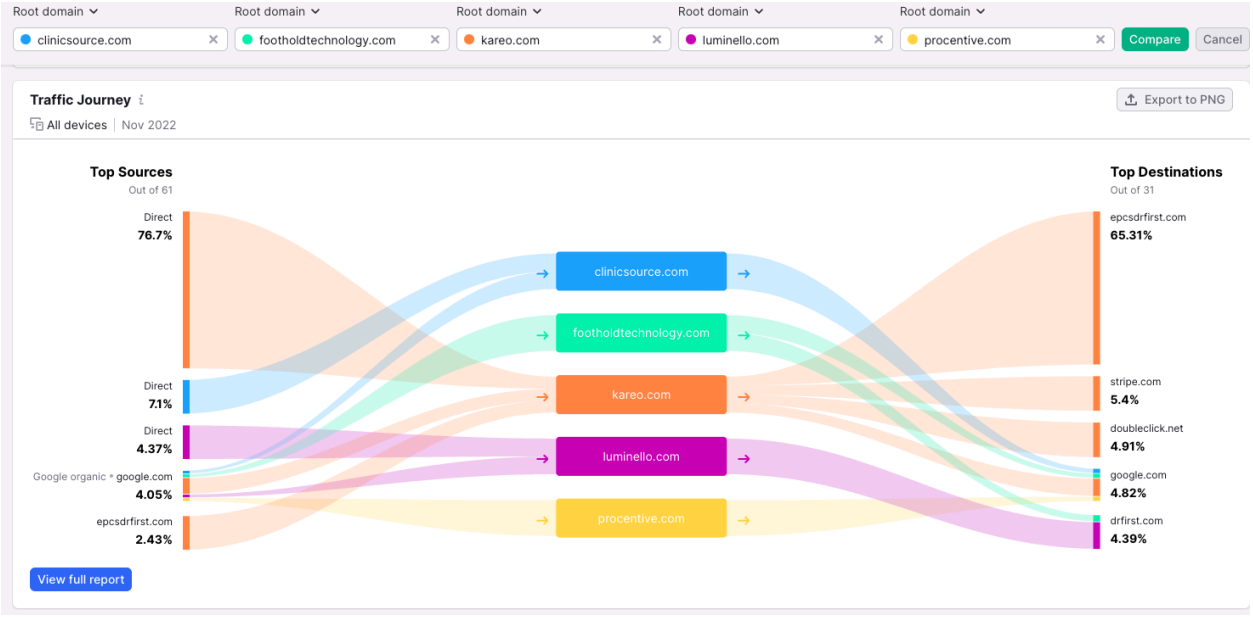
Retargeting: Retargeting should be an active part of HealthBiller marketing efforts. When a person comes to the site, and we can identify they are a targeted persona, for the next 72 hours after their visit, the person should see display ads on sites that relate to HealthBiller.

Co-branded emails HealthBiller needs to have new prospects to nurture. Co-branded emails sent by a respected publication that is read by individuals who want but are having trouble conceiving. The email is sent out by the publication and because it is from a trusted name is more likely to be opened. The status that the publication has is also transferred to HealthBiller because the email is an endorsement of the content. In most cases, we can get a guarante performance of the email in terms of open and conversion rates.

Trusted Source Review Analysis

Company	URL	Capterra		Software Advice		G2	
		Score	Reviews	Score	Reviews	Score	Reviews
HealthBiller	HealthBiller.com	0.0	0	0.0	0	0.0	0
ClinicSource	clinicsource.com	4.0	61	4.03	60	3.9	17
Foothold	footholdtechnology.com	4.5	32	4.47	32	4.7	27
Kareo	Kareo.com	3.9	368	3.91	368	4.0	121
Luninello	Luminello.com	4.7	56	4.70	56	5.0	1
Procentive (Therapy Brands)	Procentive.com	3.5	2	3.50	2	4.0	10
SimplePractice	Simplepractice.com	4.6	2,574	4.60	2,574	3.9	83
Therapy Appointment	therapyappointment.com	4.2	100	4.21	100	4.0	5
TheraNest (Therapy Brands)	TheraNest.com	4.4	891	4.41	891	4.0	78
TherapyNotes	Therapynotes.com	4.7	739	4.69	739	4.4	79
Valant EHR Suite	Valant.io	4.0	205	3.99	205	3.4	13





The first question that must be address is why are 3rd party referral sites a valuable source of quality leads. The statistics speak to that question.

- **74%** of consumers say positive reviews make them trust a business more
- **82%** of users visit review sites because they intend to buy a product or service
- **84%** of people trust online reviews as much as personal recommendations
- **91%** of consumers trust online reviews more than talk from a salesperson
- **92%** of consumers now read online reviews when researching products
- **97%** of buyers think online reviews are more credible than content created by companies

The reason referral sites work can be directly linked back to the study performed by Dr. Robert Cialdini. Specifically, the principles dealing with the law of social proof, liking, and authority. We live in fast pace world where we simple to not have the time to evaluate every alternative and feature of all the products that are available. We have adapted by taking shortcuts to determine what products work best to solve our problems.

This is the foundation of influencer marketing and works even if you don't know the person making the recommendation. All that is necessary is the perception that they are like you with respect to any number of factors.

For third-party referral sites to be most effective it is important that you should have more reviews than every other company listed in your category (this is not a requirement, of course). As well as having many reviews, it's important to be generating new reviews on a weekly basis (at a minimum).

While these sites normally work on a Pay Per Click (PPC) model, the psychology of having both more reviews and once that are recent will translate into more conversions.

Findings:

Several competitors (SimplePractice, TheraNest, and TherapyNotes have made a concentrated effort to acquire positive reviews on Capterra and Software Advice (same company), however those reviews have not been a dominate source of traffic. Most likely because 1) they do not have an ongoing client review process that would result in more organic traffic and 2) they have opted not to purchase leads from these sources.

Recommendations:

Third-party referral sites can be a substantial source of high-quality leads. If a demand generation budget exists, using a portion should be considered. It should be prioritized after:

1. Co-branded emails
2. Reseller Initiatives
3. Client Referral Programs
4. Third-Party Referral sites
5. Pay Per Click

Public Relations Analysis

During 2022, HealthBiller had absolutely no press releases at all. A comprehensive program needs to be established to ensure that the appropriate information is shared for PR release, the process being used, and how the PR efforts are enhanced through amplification in social media and with influencers.

HealthBiller needs to include in PR release the following areas:

- Product Releases/Improvements
- Business Event Participation
- Community Relations Initiatives
- Corporate and Social Responsibility Initiatives
- Employee Relation Initiatives
- Awards

In addition, any Public Relations efforts need to incorporate the following:

The Public Relations Strategy for External Audiences Includes:

I. Communications Infrastructure Development

a. Press Kit Development - The press materials will include corporate backgrounder, fact sheet, management biographies, etc.

b. Editorial Calendar Opportunity Research
Research planned editorial calendars of target publications to identify appropriate editorial opportunities for HEALTHBILLER. Then develop and maintain an editorial opportunity matrix, including upcoming editorial topics and contact information.

c. Media, Blogger & Industry Influencers Database Development
Compile existing relationships and conduct further research and develop a comprehensive contact database covering the key media, bloggers and opinion leaders in the industry.

II. Media Relations

a. Proactive Story Pitching
Working closely with HealthBiller's executives to identify newsworthy angles to incorporate into creative story pitches for target media. We always take the time to customize pitches for each target media. These pitches are intended to:

- ❖ Differentiate HealthBiller from other companies in the competitive marketplace
- ❖ Highlight HealthBiller's offering, its value propositions and success stories;
- ❖ Take HealthBiller's story to mainstream national audience; and
- ❖ Monitor HealthBiller's marketing content to evaluate how we can leverage these to generate additional visibility in the media.

b. Editorial Opportunities

Editorial calendar opportunities:

- ❖ These are long lead times, but keep momentum going.
- ❖ Most monthly publications have 3-to-6 month lead times.

c. Ongoing Publicity and Press Releases

- ❖ Timely responses to inquiries and opportunities to secure opportunities quickly.

d. Media Coverage Monitoring and Metrics

- ❖ Monitor HealthBiller and their competitors' media coverage daily and provide necessary follow-up.
- ❖ Compile and regularly update a media metrics report to highlight HealthBiller's media articles and their readership numbers.
- ❖ Promote media hits via all social media channels (including Key Executives)

- ❖ Monthly wrap-up of industry and competitive news coverage.
- ❖ Monthly reporting of Publicity Value numbers, from industry-standard algorithms.

e. Ensure SEO Strategy Is Integrated with Media Relations Strategy
Maximize search engine efforts by incorporating keywords into the positioning, messaging and media placements (blog content, third-party and bylines) to try to facilitate more backlinks that underscore the overall marketing strategy.

f. Competitive & Industry Media Analysis
To understand HealthBiller's evolving competitive landscape, monitor competitors' major announcements and media coverage on a daily basis and report significant news to key executives. In addition, actively scan our target media for major industry news and trends and forward notable articles to HealthBiller. This exercise can also be helpful in identifying additional media, bloggers and industry influencers with whom we can follow up to introduce HealthBiller.

Earned Media Performance

Earned media is acquired by getting an influential publication or media outlet to publish an article or content that is either created by them or by HealthBiller. It is free, but you must attract the interest of the gatekeepers who hold the key to accessing their audiences and talking about your HealthBiller and publishing your content.

This can be an informative or interest article or where a key HealthBiller executive is used as expert in an article on the topic. Earned media gives you third-party credibility – someone who isn't paid by your company believes enough in your products, insights, etc. to mention, quote, or promote your brand's content.

The critical element for any earned media endeavor is that the audience believes the article was written independent of any payment or influence by HealthBiller

Any article cannot come across as an advertorial that was written and paid for inclusion by HealthBiller. While it certainly makes the information available it would have far more impactful if it was perceived as a legitimate news story.

The industry best practice is for HealthBiller to still write the article but to have the byline by a publication representative. This requires the building of relationships and the understanding that they will be publishing an article that is unique and not a version of a press release.

Earned media also enables your brand to reach a wider audience – an audience that may not know about you but can benefit from your content, products, or services.

Simply said, earned media may take more work because you are not in control of the process and decision-making, but it should be a major component of your content marketing strategy.

Earned Media Recommendations:

HealthBiller needs to implement an earned media strategy that presents HealthBiller in national publications and news outlets. This will be in the form of articles created by HealthBiller and pitched to the gatekeepers. HealthBiller executives should also be presented to these same publications and news outlets as experts who are available for comments or interviews.

Authoritative News Venues **-** Many targeted personas leaders listen to or watch news and financial programs that are seen on various cable news channels (CNBC, FOX, etc.). HealthBiller needs to have stories about their product, culture, and success told in major media markets.

- Level 1 - Local Market (New York Times, LA Times, etc.)
- Level 2 - National Magazines (WSJ, Forbes, Fortune, Fast Company, Harvard Business Review, The Economist, Entrepreneur, BusinessWeek, or McKinsey Quarterly. etc.)
- Level 3 – Industry Specific Publications (Medical Journal, etc.)

The Company CEO and other leaders should become guests on national broadcasts (television and podcasts). This will not only help the brand and provide credibility, but will also build the framework should they later seek to go public or be acquired)

- Level 4 – National Publications/TV Shows/Analysts (Squawk Box, Mad Money, etc.)

Authoritative Publication - We will identify authoritative magazines that accept blog syndications and have broad credibility with market segments and impact investors that would be potential tenants/clients. Syndicating blog content, complete with backlinks, across these publications will improve domain authority and help achieve solid organic search results. This is different than brand and product-oriented media placements that have a higher publicity value for brand and product perception. The publication of these pieces will be accompanied by blogs and social media posts to more widely distribute the content and message.

Reseller and Referral Programs

Company	URL	Reseller Program	Referral Program
HealthBiller	HealthBiller.com	No	No
ClinicSource	clinicsource.com	No	No
Foothold	footholdtechnology.com	No	No
Kareo	Kareo.com	No	Yes ($100)
Luninello	Luminello.com	No	No
Procentive (Therapy Brands)	Procentive.com	No	No
SimplePractice	Simplepractice.com	No	Yes ($100)
Therapy Appointment	therapyappointment.com	No	No
TheraNest (Therapy Brands)	TheraNest.com	No	No
TherapyNotes	Therapynotes.com	No	No
Valant EHR Suite	Valant.io	No	No

Findings:
Neither HealthBiller nor their competitors have a vibrant reseller or referral program. The two organizations (Kareo and SimplePractice) that have a referral program offer so little incentive that the impact is likely to be nil.

Recommendations:

One highly impactful method of increasing market share and revenues is only pay where the effort has resulted in a new client. An effective reseller and referral program can operate on that basis and leverage the time, relationships, and efforts of trusted third parties.

HealthBiller should develop a new partner reseller and referral program that:

- Informs and encourages both Reseller Partners, Referral Partners
- Compensates each partner type based on their performance and business model.
- Incentivizes proactive partners such that it supports their business model.
- Communicates regularly to all partner types to maintain and grow mindshare.
- Communicates regularly to build partners into HealthBiller Advocates.
- Provides sales tools that enhance their marketing success with less effort.
- Makes working with HealthBiller as simple, fast, and efficient as possible.

Path to increased revenues from a proactive “win-win” reseller program. The revenue share should be consistent with the effort the referral or reseller partner puts into acquiring and maintain the client. Here is an example that should be considered:

	Referral Partner	Reseller Diamond Partner	Reseller Elite Partner
Revenue Share* * Initial Sale Amount – Paid Quarterly	10% Lifetime Revenue Share	20% Lifetime of Revenue Share	40% Lifetime Revenue Share
Partner Onboarding	No	No	YES
HealthBiller Demo Account	No	No	YES
Provides Customer Support	No	No	YES
Sends Monthly Emails	No	No	YES
Reciprocal Monthly Blogs	No	No	YES
Monthly Webinars	No	No	YES

Domain/Trust Rankings Analysis

Company	URL	Domain Authority	Page Authority	Moz Rank	Google Page Rank	Trust Flow	Citation Flow	Trust Metric	Search Visability
HealthBiller	HealthBiller.com	11	30	3.00	20%	5.00	21	5.00	1.86%
ClinicSource	clinicsource.com	27	41	4.10	30%	8.00	40	8.00	17.12%
Foothold	footholdtechnology.com	40	46	4.60	40%	31.00	36	31.00	28.84%
Kareo	Kareo.com	55	50	5.00	50%	46.00	40	46.00	4.10%
Luminello	Luminello.com	29	41	4.10	40%	11.00	34	11.00	8.98%
Procentive (Therapy Brands)	Procentive.com	24	42	4.20	30%	25.00	33	25.00	21.76%
SimplePractice	Simplepractice.com	49	57	5.70	50%	31.00	46	31.00	37.55%
Therapy Appointment	therapyappointment.com	33	44	4.40	40%	23.00	41	23.00	36.14%
TheraNest (Therapy Brands)	TheraNest.com	40	48	4.80	40%	19.00	26	19.00	26.67%
TherapyNotes	Therapynotes.com	41	43	4.30	40%	23.00	36	23.00	0.00%
Valant EHR Suite	Valant.io	34	41	4.10	40%	14.00	43	14.00	14.76%
Therapy Brands	therapybrands.com	27	40	4.00	30%	26.00	40	26.00	23.04%



Domain Authority, Page Rank, and Trust Metrics typically reflect how well an organization is managing their earned media.

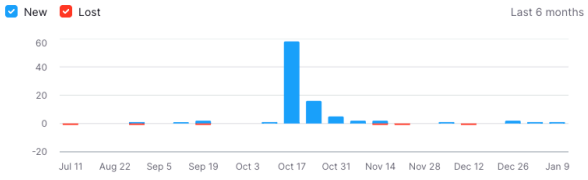
The four categories shown above are reflective of how Google perceives the respective websites. A significant part of the algorithms that Google uses is based on how much original content is created and distributed as well as how other websites, influencers, or social experts perceive the site.

If other high-ranking sites are sharing your content through publication or backlinks, Google will use this as an indication that your site is authoritative on the subject matter being discussed. This will in turn generate more organic traffic to your website.

HealthBiller ranks at the bottom for all categories related to domain authority, page authority, page rank, trust and search visibility.

Here are some data related to HealthBiller specifically.

New and Lost Referring Domains



View full report

New and Lost Backlinks



View full report

Categories of Referring Domains

Health > Medical Facilities & Services	7%	8
Health	7%	8
Jobs & Education	6%	7
Health > Medical Facilities & Services > Doctors' Offices	6%	7
Health > Health Education & Medical Training	6%	7

View full report

Top Anchors



View full report

Referring Domains by Authority Score

91 - 100	0%	0
81 - 90	0%	0
71 - 80	0%	0
61 - 70	0%	0
51 - 60	0%	0
41 - 50	5%	6
31 - 40	4%	4
21 - 30	38%	41
11 - 20	47%	51
0 - 10	6%	7

View full report

Backlink Types

Text	99%	717
Image	1%	10
Form	0%	0
Frame	0%	0

Link Attributes

Follow	56%	409
Nofollow	44%	318
Sponsored	0%	0
UGC	0%	0

TLD Distribution



TLD	Referring Domains	
.pw	58%	63
.com	15%	16
.space	10%	11
other	17%	19
.gov	0%	0
.edu	0%	0

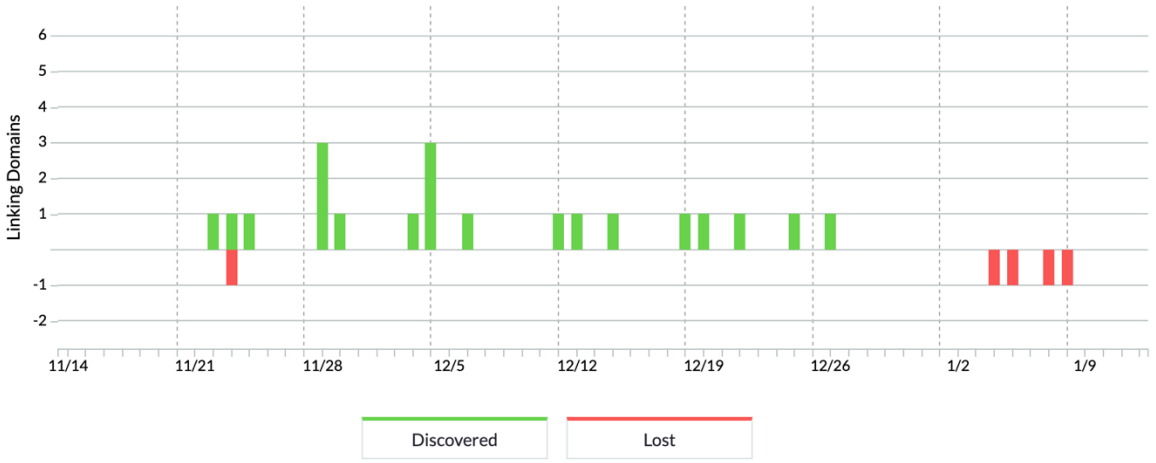
Top Countries

Country	Referring Domains	
Singapore	78%	78
United States of America	20%	20
Hong Kong	1%	1
Germany	1%	1

No more countries

Discovered and lost linking domains

Total Discovered	Total Lost		Net
+20	-5	=	+15



Top followed links to this site

URL	Page Authority
www.screencast.com/t/ba5ksssToj	39
www.screencast.com/...-457d-9772-9080bc5e6eb3	37
seositecheckup.com/ ...-audit/www.healthbiller.com	33
mobileservices.texterity.com/ ...m=1508509940000	30
mobileservices.texterity.com/ ...m=1488379795000	30

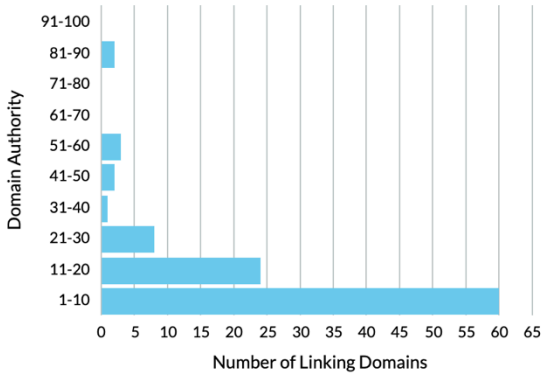
Top pages on this site

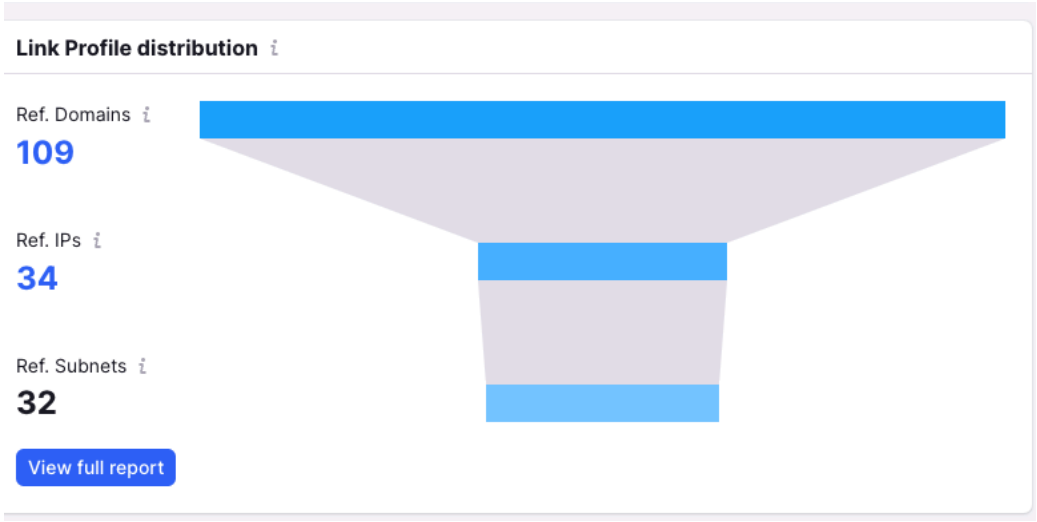
URL	Page Authority
healthbiller.com	30
www.healthbiller.com	27
www.healthbiller.com/dpc	24
www.healthbiller.com/license	22
www.healthbiller.com/data-conversion	21

Top anchor text for this site

Anchor Text	Followed External Links
[no anchor text]	8
"healthbiller"	3
"https://www.healthbiller.com/license"	3
"http://healthbiller.com"	12
"go coupon"	7

Linking Domains by DA





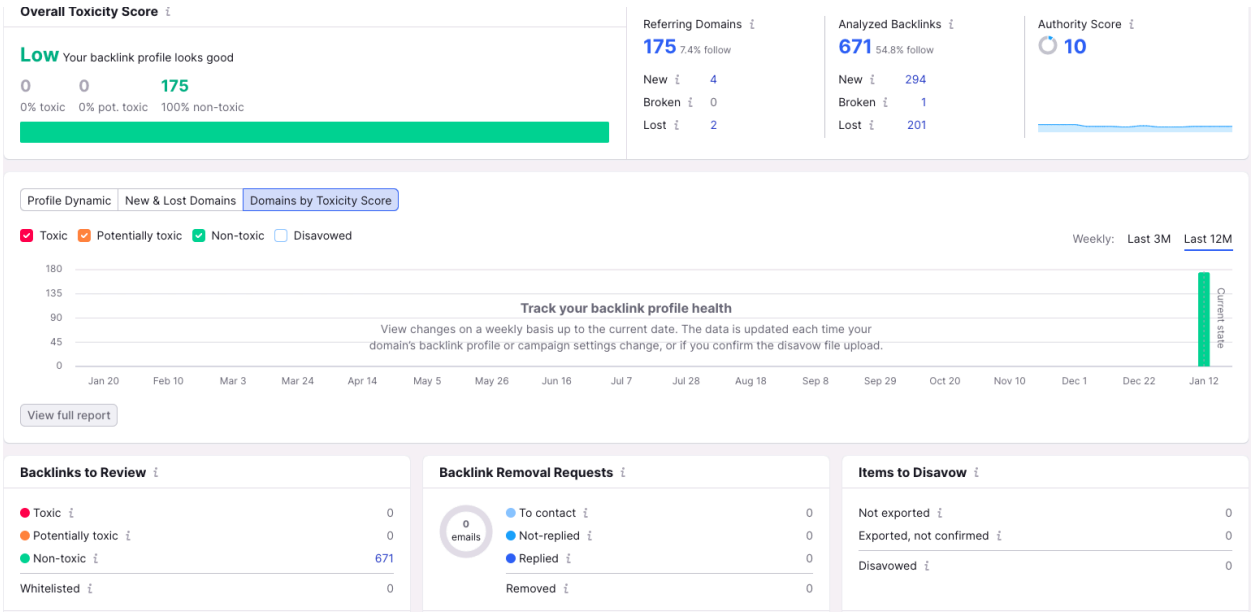
Findings:
Domain Authority, Page Rank, and Trust Metrics typically reflect how well an organization is managing their earned media. While not at the bottom of the rankings, the information demonstrates that HealthBiller needs to be more aggressive with all forms of influencer marketing including social and earned media.

Recommendations:

HealthBiller first needs to start a regular blogging and social media outreach program. This will help them obtain social earned media and backlinks. Make sure that the backlinks are only from sites that have more juice (authoritative sites that have a higher MOZ domain authority). Also, eliminate any backlink to their site coming from any site that has a lower Domain Authority. That should have a positive impact on the Domain Authority, Page Rank, and Trust Metrics.

Backlinks Analysis

Company	URL	Referring Domains	Backlinks	Refering IPS	Monthly Visits	Keywords
HealthBiller	HealthBiller.com	109	727	34	N/A	30
ClinicSource	clinicsource.com	998	13.9K	1.1K	225K	1.7K
Foothold	footholdtechnology.com	1.7K	15.3K	1.6K	79.9K	4.2K
Kareo	Kareo.com	8.9K	371K	8.2K	2.8M	192K
Luminello	Luminello.com	988	287K	818	239K	2.2K
Procentive (Therapy Brands)	Procentive.com	848	18.4K	887	150K	3.3K
SimplePractice	Simplepractice.com	9.8K	629K	5.3K	5.7M	58.4K
Therapy Appointment	therapyappointment.com	2.2K	34.9K	1.9K	708K	5.5K
TheraNest (Therapy Brands)	TheraNest.com	2.4K	35K	2.4K	758K	16.1K
TherapyNotes	Therapynotes.com	2K	41.9K	2.3K	1.5M	11.7K
Valant EHR Suite	Valant.io	1.8K	39.6K	2K	580K	12.1K
Therapy Brands	therapybrands.com	760	16.9K	837	36.8K	5.2K



Findings:

HealthBiller is significantly behind the market leaders when it comes to having its content recognized and shared by third-party authorities or experts.

To increase the backlinks and improve HealthBiller's Google page rank, there needs to be a concentrated effort to secure backlinks from authoritative and relevant publications.

HealthBiller has 109 domains that refer a total of 727 backlinks. However, all backlinks are not good and those that are coming from websites that have a lower Domain Authority can actually hurt your ability to rank with Google.

The good news is that none of the 727 backlinks have been deemed toxic.

Google algorithms apply the principle that if a highly authoritative site (one with a high domain authority) is recommending their visitors to another website, the latter must also be of high value. In such situations the originating high value website transfers some of its authority or juice to the other site. The corollary is also true, a when an unauthoritative website (low domain score or spammy site) is recommending another site, they hurt the second website by transferring negative juice.

Recommendations:
HealthBiller needs to build authoritative backlinks by creating and publishing content on sites that are both relevant and that have a higher domain authority.
es that has a higher domain authority.

Content Marketing

We all have heard the adage that Content is King and without doubt that is true. If you want to curry favor with the search engines and engage your visitors when they arrive you need to provide substance. But not all content is created equal and sometimes even the best intentions can create obstacles for your site.

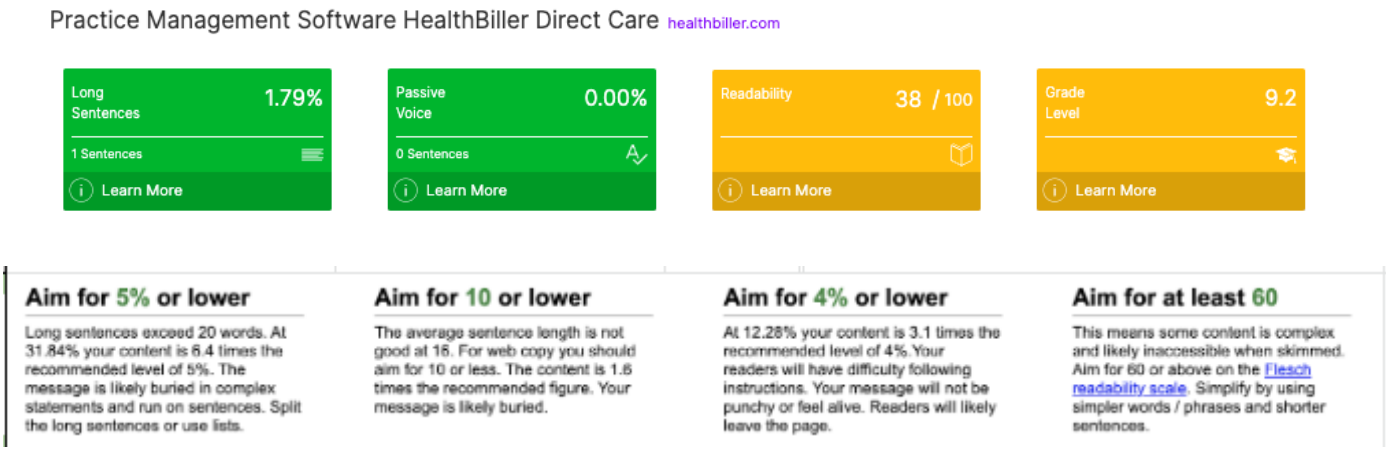
The following is an examination of the factors that will invite the search engines to reward you with organic traffic and ensure that your targeted buyer personas can understand what you are presenting to them.

Remember, quality content means that the content is fresh, relevant, and access shared where targeted buyer personas go for information and third-party verification. Every piece of content needs to address a pain point, interest, or concern of a buyer persona. When creating content, you need to make sure that there is the right type of content in various media formats (blogs, eBooks, Videos, Infographics, etc.) for each buyer persona and at each stage of the buyers' journey.

Never create content for content sake. It must always have a purpose that can be defined and that will help promote the buyer to the next stage of their journey.

Content Quality Analysis

Company	URL	Site Analyer Content	MOZ Spam Score	Long Sentences (s/b 5% or lower)	Passive Language (s/b 4% or lower)	Readability (s/b 60 or greater)	Flesch-Kincaid Grade Level (s/b 10 or lower)
HealthBiller	HealthBiller.com	53.60%	2%	1.79%	0.00%	38%	9.2
ClinicSource	clinicsource.com	70.50%	0%	9.09%	9.09%	54%	7.5
Foothold	footholdtechnology.com	68.70%	2%	Not Readable	Not Readable	Not Readable	Not Readable
Kareo	Kareo.com	69.70%	4%	12.27%	3.07%	54%	7.8
Luninello	Luminello.com	67.60%	0%	7.83%	6.96%	49%	8.6
Procentive (Therapy Brands)	Procentive.com	20.20%	0%	Not Readable	Not Readable	Not Readable	Not Readable



Findings:

Readability is one of the more important aspects of Web design usability. Readable text affects how users process the information in the content. Poor readability scares readers away from the content. On the other hand, done correctly, readability allows users to efficiently read and take in the information in the text. You want users to be able to read your content and absorb it easily.

Scannability: A website must first be scannable. Most website visitors will scan a page to see if it is interesting and relevant. Long Sentences can decrease the scannability of a website making it more likely the person will bounce before they find the value proposition. Long Sentence should be kept at under 5% to ensure the site is scannable. HealthBiller's website scores a 0.00%. While would appear to be excellent, the fact is there is simply not much readable text on the website. Most are images which make it difficult for the search engines to scan.

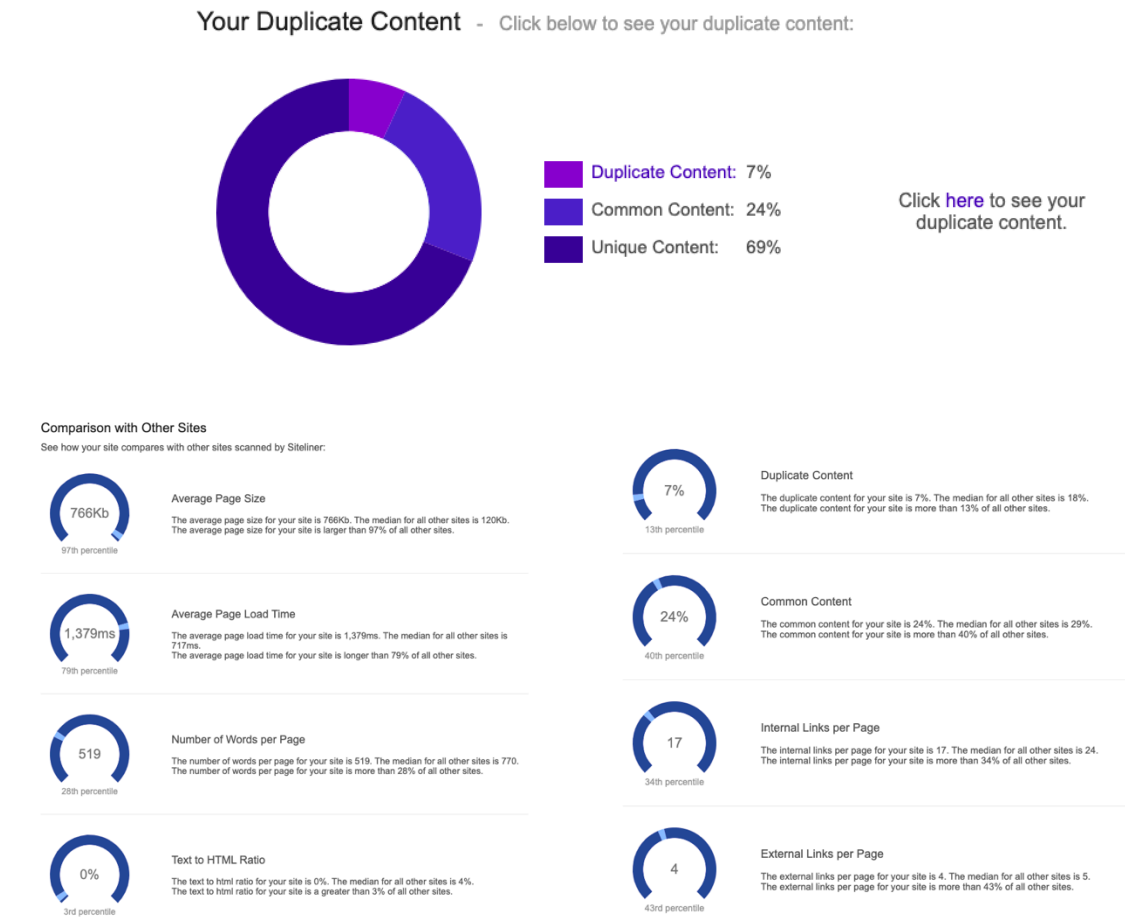
Active Voice: Active voice is best for web content. The use of a passive voice should only be used to front-load important keywords in headings, blurbs, and lead sentences. This enhances scannability and thus SEO effectiveness. The use of the passive voice should not exceed 4%. HealthBiller's website scores a 0.00%. While would appear to be excellent, the fact is there is simply not much readable text on the website. Most are images which make it difficult for the search engines to scan.

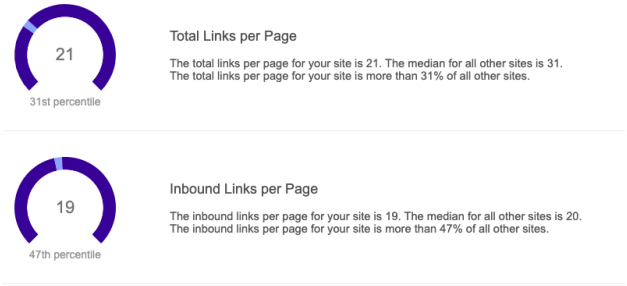
Readability score: Readability scores should be at least 60. This means the content is clear and easily understood when skimmed. The readability score for HealthBiller's

website is 38%. This means the message is not clear and the readers can't follow the instructional text.

Grade Level: Content should always be written so a person does not have to open a dictionary to understand its meaning and context. You should try and write to an eight-grade level even when writing to professionals. This makes sure that the content is scannable. The content on HealthBiller's website is written to the 9.2 grade level.

Company	URL	Duplicative Content	Common Content	Unique Content	Internal Links Per Page	Words Per Page	Site Analyer Content	MOZ Spam Score
HealthBiller	HealthBiller.com	7%	24%	69%	17	519	53.60%	2%
ClinicSource	clinicsource.com	18%	31%	52%	30	1228	70.50%	0%
Foothold	footholdtechnology.com	Not Readable	Not Readable	Not Readable	Not Readable	Not Readable	68.70%	2%
Kareo	Kareo.com	24%	52%	23%	138	3060	69.70%	4%
Luninello	Luminello.com	15%	52%	33%	56	3270	67.60%	0%
Procentive (Therapy Brands)	Procentive.com	31%	32%	38%	21	575	20.20%	0%
SimplePractice	Simplepractice.com	17%	24%	59%	60	1248	23.90%	1%
Therapy Appointment	therapyappointment.com	15%	16%	68%	20	615	54.10%	1%
TheraNest (Therapy Brands)	TheraNest.com	15%	14%	70%	46	1126	65.60%	0%
TherapyNotes	Therapynotes.com	Not Readable	Not Readable	Not Readable	Not Readable	Not Readable	19.50%	23%
Valant EHR Suite	Valant.io	25%	28%	46%	70	1196	71.40%	2%
Therapy Brands	therapybrands.com	35%	24%	40%	40	1280	70.50%	1%





Findings:

Duplicative Content – Search engines can penalize your site for duplicative content. This means there is identical content found on two or more pages of your site. The median for most websites is 20%. HealthBiller's website has 7% duplicative content. While would appear to be excellent, the fact is there is simply not much readable text on the website. Most are images which make it difficult for the search engines to scan.

Common Content: This is content found on multiple pages, but not considered duplicate content because it is commonly used words (e.g., a, an, the, etc.) The median for most websites is 31%. HealthBiller's website has 24% common content. While would appear to be excellent, the fact is there is simply not much readable text on the website. Most are images which make it difficult for the search engines to scan.

Unique Content: Having unique content on your website is one of the most critical elements in search engine optimization. This is content found on a website that is truly unique and is often rewarded by the search engines. The average website has 40% unique. HealthBiller's website has an excellent score of 69%. While would appear to be excellent, the fact is there is simply not much readable text on the website.

Internal Links: Having unique content on your website is one of the most critical elements in search engine optimization. This is content found on a website that is truly unique and is often rewarded by the search engines. The average website has 40% unique. HealthBiller's website has an excellent score of 69%. While would appear to be excellent, the fact

Content Quality Recommendations:

Google loves fresh relevant and timely content. Google loves videos. Google hates duplicative content. The major takeaway from the analysis is 1) you need more content on the website itself 2) and that significant content improvements that would make the HealthBiller's website more likely to garner organic traffic from Google and when a targeted buyer persona does land on the website, they would be more likely to engage.

The content on the current website should be re-written by a lay person who has more expertise in marketing. The intent is not to dumb it down or change any context or meaning. However, there is a different skill set a marketer who has expertise can bring

to the table by introducing the correct level of key words and long-tail key words as well as ensure that the person reading the text will understand the meaning.

The entire website needs to be reworked. There is simply not enough content that will attract the search engines and keep any visitor once the find the site.

Blog Analysis

Company	URL	Blog Link on home Page	Blog Summary on home Page	Blogs (3 months)	Unique Authors	Length of Posts	Images	CTAs	Properly Formated	Proper Mix	Videos
HealthBiller	HealthBiller.com	No	No	No	No	No	No	No	No	No	No
ClinicSource	clinicsource.com	No	No	No	No	No	No	No	No	No	No
Foothold	footholdtechnology.com	Yes	Yes	2	Yes	Long Form	Yes	No	No	No	No
Kareo	Kareo.com	Yes	Yes	0	Yes	Long Form	No	Yes	No	No	No
Luninello	Luminello.com	Yes	Yes	0	Yes	Long Form	No	No	No	No	Yes
Procentive (Therapy Brands)	Procentive.com	Yes	No	4	No	Long Form	No	Yes	No	No	No
SimplePractice	Simplepractice.com	Yes	No	2	No	Long Form	No	Yes	No	No	No
Therapy Appointment	therapyappointment.com	Yes	No	No Dates	Yes	Long Form	No	No	No	No	No
TheraNest (Therapy Brands)	TheraNest.com	No	No	No	No	No	No	No	No	No	No
TherapyNotes	Therapynotes.com	Yes	No	5	Yes	Short Form	No	No	No	No	No
Valant EHR Suite	Valant.io	Yes	Yes	No Dates	No	Short Form	No	No	No	No	No
Therapy Brands	therapybrands.com	Yes	Yes	4	No	Short Form	No	Yes	No	Yes	No

The Benefits of Blogging

Improved SEO: Search engines love fresh content that addresses a question, pain point, interest or concerns (QPIC) that website visitor inquired about in a search.

Search engine bots have two main functions—crawling content and building an index. This allows Google to know which sites can provide answers to such questions as “what is the best solution for tax credit and incentive management?” Your website will not be found if you do not have an aggressive practice of creating and sharing of content.

Each time you create a new blog post you get one more page for the search engines to index on your website. This is simply another opportunity for your site to show up in the results page of any search inquiry. This will translate to more organic targeted traffic**.**

Improved Credibility and Trust: Ninety-nine percent (99%) of people won’t buy on their first visit to your site (Seewhy). They come to try to understand who you are, why should they care, and most importantly can you solve a problem they have.
So, the website visitor is first coming to learn but based on the information they find they will decide usually after 7 visits (to your site or 3rd party sites that have shared your content) if they feel comfortable enough to buy from you.

A well formulated blog that is optimized with key words does help them give answers to the searches made by internet users. It is this search that website businesses can target through blogs. When you provide valuable and relevant content that gets indexed well, your products and services start becoming the top options shown to an internet user during his search. By providing addressing QPIC of your website visitors, each new piece of blog content increases your credibility and their trust.

Lead Generation: New content also provides you the ability to use in a normal fashion highly sought-after keywords and long-tail keywords. This increases the opportunity for you to increase your visibility of your site on the Search Engine Result Pages (SERPS).

the Regular new content on your blog also gives **additional credibility** to your website, and it creates opportunities for you to include the most important keywords in your posts that are sure to help you increase visibility of your site on SERPs.

Improves Social Proof: We stated earlier that distribution of the content is equally important as its creation and quality. Your blog content should be the foundation of your social media marketing efforts. Every time a blog is created, it needs to be shared across all social media platforms. This will not only drive traffic back to your website but improve your organic traffic as Google looks to social proof as one element in its algorithms.

Company Voice: Blogging gives your company a voice. It provides your business with a platform for sharing ideas, talking about new products and services, and commenting on new industry trends. Blogging also helps your customers get a better sense of your company's vision and corporate standards**.** In other words, blogging lets you tell the story of your brand.

Client Retention & Loyalty: By providing your readers with an insight into your company, you are making an emotional connection with them that will easily translate into customer loyalty over time.

Not Convinced? Let's Examine the Numbers

A blog is critical for a website for the optimization of the user's trust and for the search engines to send organic traffic to your site. Here are some statistics that demonstrate the value of having a blog:

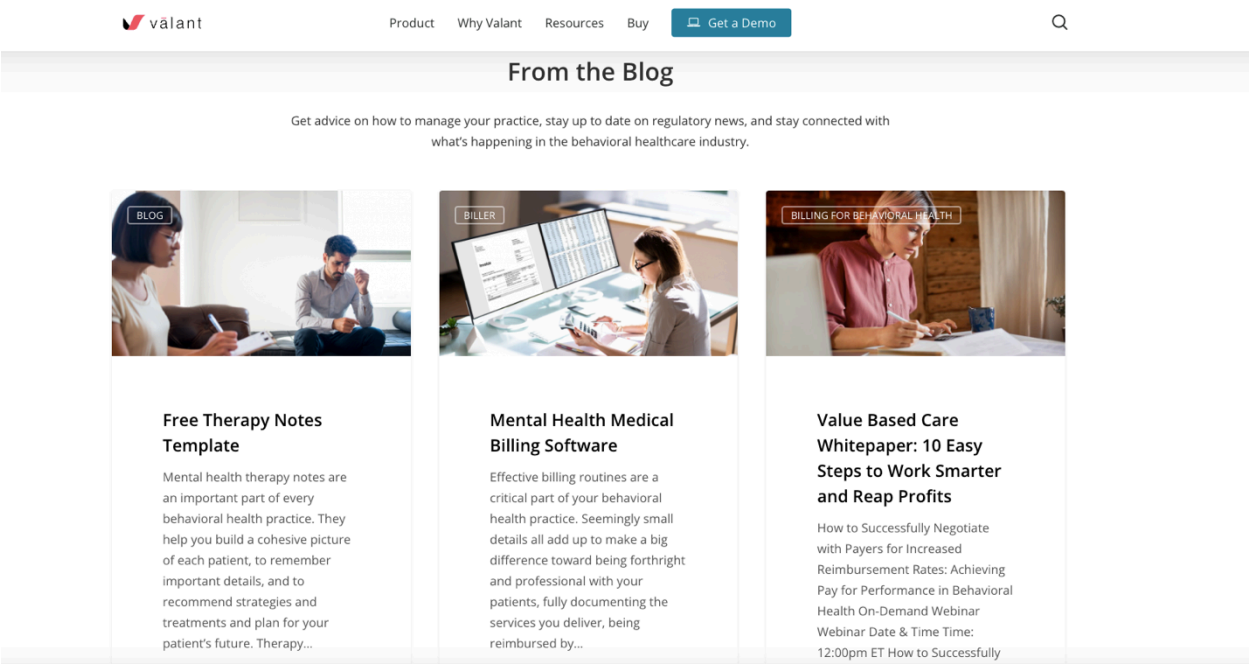
- Website with an active Blog generates 126% more leads
- Interesting content is one of the top reasons people follow brands on social media
- 81% of US consumers trust blog advice and information
- Companies that blog have 97% more inbound links
- Website with blogs have 434% more indexed pages
- Companies that published 16+ blog posts per month got almost 3.5X more traffic than companies that published 0-4 monthly posts. (HubSpot, 2015)
- Companies that published 16+ blog posts per month got about 4.5X more leads than companies that published 0-4 monthly posts. (HubSpot, 2015)

- ❖ You have a **434% higher chance of being ranked** highly on search engines if you feature a blog as part of your website (Tech Client).
- ❖ Businesses using blogs as part of their content marketing mix get **67% more leads** than those who don't (HubSpot).

Findings:

HealthBiller has surrendered performance SEO to their competitors. They are missing out on a tremendous opportunity to obtain both organic traffic, build trust and convert. The good news is that the competitors we reviewed are also doing a dismal job of blogging that will allow HealthBiller to garner traction and market share if they have an aggressive blogging program done to best practices.

Home Page Blog Summary: The content found on most websites home pages is usually static information. This does not give Google any reason to send people to your site. Having a blog summary on your home page will provide that fresh new content they are looking to share. It these sections are not robust and constantly sharing new and relevant content your SEO will suffer and you will not see organic traffic. Below is an example of how one company shares their blog content on their home page:



You Can't Fool Google (or your customers): HealthBiller does have ANY blogs. To obtain organic traffic HealthBiller needs to generate blogs on any consistent basis. The blogs need to have a real person as the author and the date it was posted.

You cannot fake it and fool Google or potential customers by having undated blogs. You cannot hop to garner the benefits of blogging by having stale-tired blogs done just every so often.

Format: To maximize the effectiveness of any blogging program it is important that the reader can relate the person writing the blog. Human to Human marketing works the same way for b2b and it does for b2c engagements. HealthBiller needs to identify the name and background when using a guest. Impersonal blogs do not garner the same level of trust. Identify several people in your organization and have blogs written for them and share the same type of information that is provided for guest bloggers.

Medium: Not everyone likes to read blogs. While they are imperative for marketing/sales success, the written blog only represents one medium, the written word. Many people will not take the time to read and digest the information that would improve their understanding of your product and how you can help solve their problems. That is why your blogs need to have a mix of traditional written blogs, infographics, podcasts, and videos.

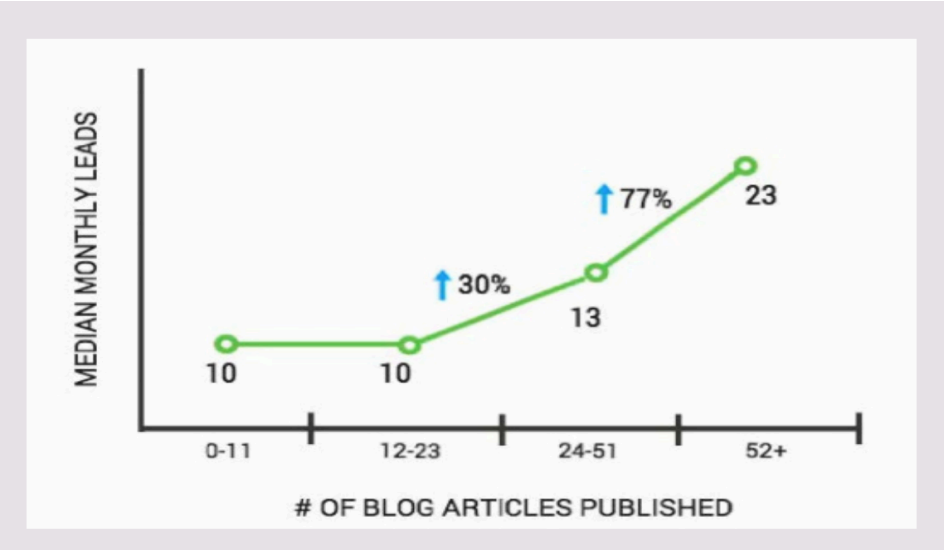
Findings:
All the added content on HealthBiller's website are random pictures or videos showcasing a new feature. While this absolutely important to show product updates. It is not being done in the right format and missing out on the most important aspect of ANY marketing effort. Nobody cares a whit about you or your company. They care about what you can do to improve their life or their company.

Recommendations:
Utilizing the general blogging recommendations in the next section, incorporate the correct balance of each blog medium. It is important to note that even when an alternative blog medium is utilized, that the blog does include a detail description for infographics and a written transcript for podcasts or videos. While Google did recently announce that they are using some limited audio transcription of voice and video, it is at best still in the early stages. The best practices are for the additional transcription similar to what MOZ does for the White Board Friday Series.

Blogging Recommendations:

Adopt an aggressive blogging program.

The first step is creating content that will drive highly qualified traffic to your website. Our top recommendation is to begin blogging for your business. While it can be intimidating to produce relevant and valuable content on a regular basis, especially with limited resources, it's attainable. In addition to the written blog, it is best to incorporate blogs that are comprised of videos, slides, webinars, events, and infographics. In fact, HubSpot found that businesses with blogs that have accumulated at least 51 posts see 53 percent more traffic than blogs with 20 to 50 posts.



Every blog should be a minimum a short form blog (between 600 – 1500 words) and ideally at least 50% should be a long form blog (1500 – 2000 words).

HealthBiller blogs can provide a wealth of information on topics of interest to your targeted audience. This will be rewarded by the search engines and allow the reader to trust the information they find on the blog. This trust will translate into new clients.

How Much is Enough:

The obvious answer is how much organic traffic do you want. The chart above shows the reality of generating more blogs if they are all high quality. It is possible to generate tens of thousands leads every month simply by a robust blogging program.

In the ideal world, there would be a MINIMUM of 30 quality blogs per month. However, it is critical to place quality over quantity and if there are not sufficient resources to generate more blogs then there is a sweet spot that a company must adhere.
The studies have shown that

- Companies that blog 11+ times per month got more than 4X
- Companies that blog 16+ times per month got 4.4x more leads

The best utilization of resources would be to have 11+ blogs per month for each business category. Each blog needs to have a CTA to share a resource or offer a product. This CTA should be to a graphic representation of a resource of gated content.

What is the right mix?

Blogs need to provide a diverse mixture of both topics and formats to appeal to individual reader's taste. The following should be used as a guide until data is obtained to suggest a different mix would be better.

	Articles	Videos	Pictorial	
	50%	30%	20%	
General		**Program**	**Success**	**User**
Education	**Information**		**Stories**	**Generated Content**
50%		20%	10%	20%

What is the right blog length?

While long-form content is typically defined as over 1,000 words, a Backlink study showed that the average first page results on Google contains 1,890 words.

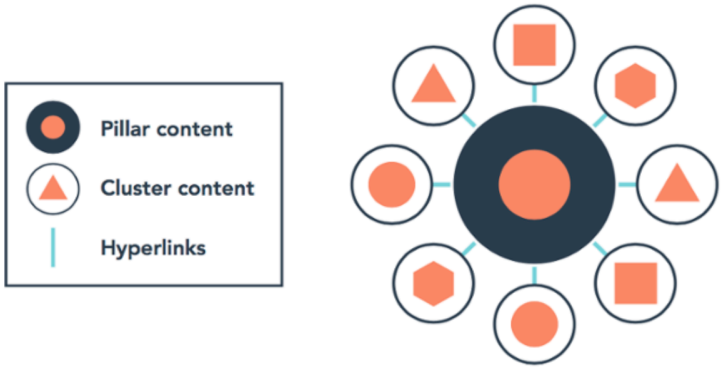
Long form content with an index can not only increase engagement by having a way for the reader to interact with the content, but also increase the amount of content consumed by keeping readers on the page. This is great news since only two-thirds of readers will engage with content for longer than15 seconds, per ChartBeat.

The recommended approach is to have 50% of your blogs be over 1,500 words and the balance to contain at least 600 words.

Utilized Pillar Blog Post Strategy

A pillar blog page is a blog post that covers all aspects of the topic on a single page but will then be enhanced with cluster blogs that provide for more in-depth reporting. The in more detailed cluster blog posts will have hyperlink back to the pillar page.

Pillar pages are longer than typical blog posts -- because they cover all aspects of the topic you're trying to rank for -- but they aren't as in-depth. That's what cluster content is for. You want to create a pillar page that answers questions about a particular topic, but leaves room for more detail in subsequent, related cluster content.

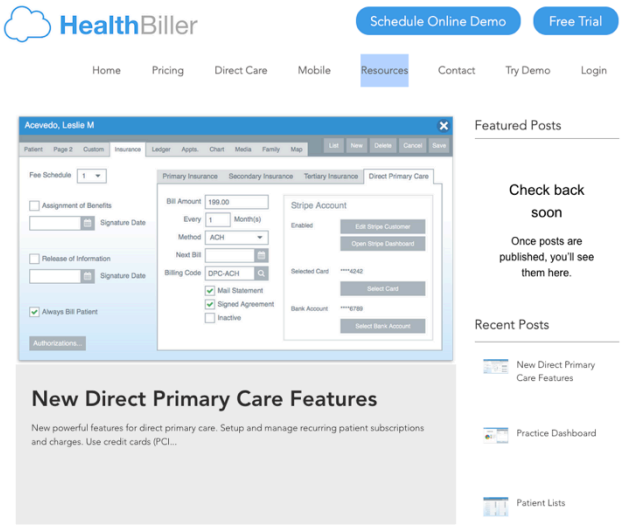


The reason for implementing a pillar blog post strategy is because Google rewards websites that have layers of content. The cluster blogs will give you the opportunity to provide more depth of knowledge and will also provide great source material for internal equity passing links.

Resource Page/Premium Content

Company	URL	Gated Content Header	Resource Link Home Page	Resource Page	Evergreen Content	Testimomials Home Page	Case Studies	Best Practices
HealthBiller	HealthBiller.com	No	Yes	Yes	No	No	No	No
ClinicSource	clinicsource.com	No	Yes	Yes	No	No	No	No
Foothold	footholdtechnology.com	No	Yes	Yes	Yes	No	Yes	Yes
Kareo	Kareo.com	No	Yes	Yes	Yes	No	Yes	Yes
Luninello	Luminello.com	No	Yes	Yes	Yes	Yes	Yes	Yes
Procentive (Therapy Brands)	Procentive.com	Yes	Yes	Yes	No	No	No	No
SimplePractice	Simplepractice.com	No	Yes	Yes	Yes	Yes	Yes	Yes
Therapy Appointment	therapyappointment.com	No	Yes	Yes	Yes	No	Yes	No
TheraNest (Therapy Brands)	TheraNest.com	No	Yes	Yes	Yes	Yes	No	No
TherapyNotes	Therapynotes.com	No	No	No	No	No	No	No
Valant EHR Suite	Valant.io	No	Yes	Yes	Yes	Yes	Yes	Yes
Therapy Brands	therapybrands.com	No	Yes	Yes	Yes	No	Yes	No

HealthBiller does have some resource content, but it is the wrong type. It is essentially just pictures or videos of new product releases. This is fine to inform current clients but does little or nothing to attract search engines or engage top and middle of the funnel visitors. While a heat map and marketing automation software can be used to verify, it seems highly unlikely that any person in the marketing funnel or sales funnel is likely to be attracted or spend any time on the current resource section.



Every time you make the person search for information it is unlikely, they will do so. The resource section needs to be both intuitive and cover information that would be valuable to a person at each stage of the buyers' journey.

It is very accurate to state if you want leads generation that content is king, and distribution is queen and she controls the level of success. Creating content that will help convert qualified prospects into leads by leveraging premium (gated) content. Premium content offers aid in converting visitors into leads at the top of funnel. Content can also be used to nurture leads further down the funnel by creating different assets that align with the buyer's journey. That means taking your content strategy a step further and thinking past top of the funnel and into the middle and bottom of the funnel.

Best practices dictate that you have a website that is robust with resources that are available in a variety of formats (e.g. eBooks, infographics, research reports, webinars, podcasts, videos, and case studies). You gate the resources that are deemed of high value to the prospective customer so you can capture and nurture the leads (e.g. eBooks and research reports). You freely provide any resource that is deemed to be more valuable to get into the hands of the prospective client (e.g. case studies and reviews/testimonials)

Your website is the best chance you have at making a great impression on potential new clients. Though your outbound content, social media channels, and ads might capture their initial interest, your site is where they'll end up making a final purchasing decision.

There are some basic best practices you'll have to cover site-wide, including the implementation of a compelling, branded design, but after the basic structure of your site is out of the way, you'll have to zero in on specific pages—and some pages are strictly more important than others. As a rule, important pages are ones that:

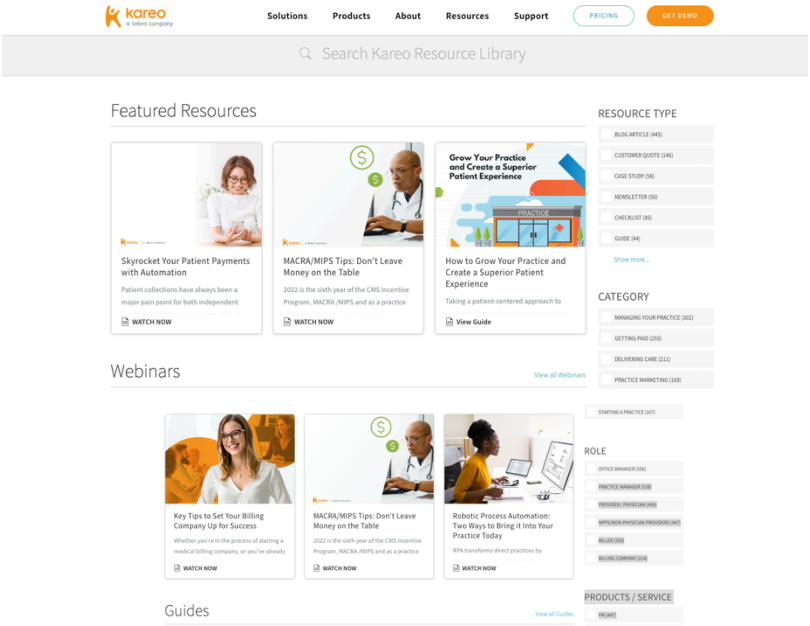
- ❖ Have the highest likelihood of attracting new traffic.
- ❖ Form the strongest impressions with new users.
- ❖ Have the highest chance of achieving a conversion.
- ❖ Give you the best chance to sell your brand.
- ❖ Are weighted more significantly than other pages by search engines.

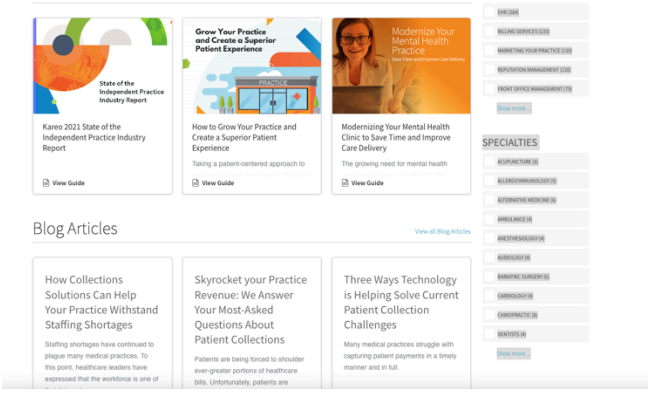
With those qualifying factors in mind, some of the content that will be highly rewarded by both Google and the person who comes upon your site are:

- ❖ Resource Page (blend of gated and ungated content)
- ❖ Testimonial page that is up to date and curated to each product or buyer persona type
- ❖ Case Studies that are curated to each product or buyer persona type.

<u>Findings:</u>

HealthBiller is not showcasing resources, reviews, and case studies. Here is an example of how Kareo share compelling resources:





<u>Resource Page/Premium Content Recommendations:</u>

HealthBiller needs to be the best in class in providing resources content and case studies/testimonials. There needs to be a portion of the content that is gated to allow contact information to be captured. The decision whether to gate will be decided based on the primary value of the content. Is it something that a potential client will find so valuable that they are willing to exchange their name and email to obtain? Or is the information more valuable to HealthBiller to get in front of the prospective customers.

Testimonials and case studies need to be an integral part of any marketing and sales enablement program that is designed to turn current clients into advocates and influencers.

Case Studies should be developed for <u>EVERY</u> successful client experience. They need to be highly curated so someone can find an experience that matches how they view themselves and their problem.

Video Marketing Analysis

Under the Social Media section for YouTube, we discussed the impact of that channel and to some extent the importance of video. The value of videos in marketing is undeniable.

Videos work EXTREMELY well for capturing the attention of targeted personas.

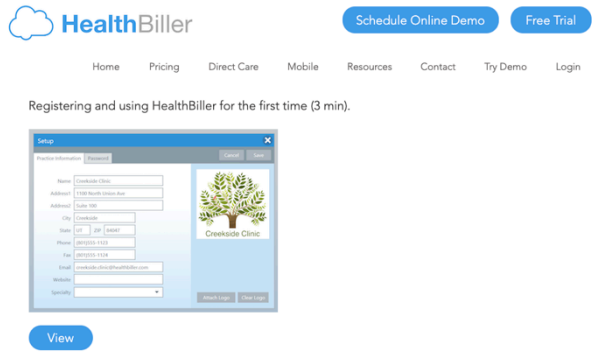
- A Video on your website can increase conversions by **80%**! (HubSpot)
- Videos are 4X more likely to be watched than read (Animoto)
- 59% of executives say they prefer video to text (Forbes)
- Videos doubles time-on-page! (MarketingSherpa)
- Videos attract 3X more organic inbound links
- Videos drive 200-300% more unique visits
- Videos increases click through rates through search by 41%
- Videos also deliver your brand personality and trusts

Findings:

HealthBiller does use videos, but they are only about new product features. Those type of videos are critical for current clients but serve no value in attracting search engines or creating interest in top and middle of the funnel website visitors. HealthBiller failed to follow best practices or optimize how the videos they are currently utilizing.

Marketing:

For the most part the video marketing component are the use of live and recorded webinars that showcase the benefits of their products and how to be utilized them.



Recommendations

Videos should be a significant part of every company's marketing and sales initiatives. In the marketing area, HealthBiller needs to have explainer videos front and center on their home and product pages. To optimize SEO benefits every video should have a written transcript that accompanies the video (like MOZ Whiteboard Friday).

The Sales team should incorporate in their sales funnel emails personalized videos from them. For example, Wistia has a product called Soapbox that will allow personalized videos directly embedded in any email. They found that an embedded video thumbnail increases engagement by 40.83%.

Some of the videos that HealthBiller should develop include:

- Introduction video (Why should you care and how can we help)
- Founders Video (b2b clients love to know the commitment at the highest level)
- The 80% Video – What Questions do you get for every sales call?
- Mission Statement Video
- Marketing Product Explainer Videos on Home Page
- Landing Page Videos
- Customer Journey Videos
- Testimonials
- Snippets for Social Media
- Email (Soapbox) videos
- Welcome and Onboarding Video

While it will take time to implement a comprehensive video program, HealthBiller should begin with in-house creation that does not require significant time or expense. Then

they should use software such as Wistia to incorporate CTAs and determine how much of the video is consumed before they lose interest. Those videos can then be tightened up and optimized.

Event Marketing

Company	URL	Event Link on Home Page	Event Page	Webinars	Industry Events	Company Events	User Groups
HealthBiller	HealthBiller.com	No	No	No	No	No	No
ClinicSource	clinicsource.com	No	No	No	No	No	No
Foothold	footholdtechnology.com	Yes	Yes	Yes	Yes	No	Yes
Kareo	Kareo.com	No	No	Yes	Yes	Yes	No
Luninello	Luminello.com	No	No	Yes	Yes	No	No
Procentive (Therapy Brands)	Procentive.com	No	No	No	No	No	Yes
SimplePractice	Simplepractice.com	No	No	No	Yes	No	Yes
Therapy Appointment	therapyappointment.com	No	No	No	No	No	No
TheraNest (Therapy Brands)	TheraNest.com	No	No	No	No	No	No
TherapyNotes	Therapynotes.com	No	No	No	No	No	No
Valant EHR Suite	Valant.io	No	No	Yes	Yes	No	No
Therapy Brands	therapybrands.com	No	No	No	No	No	No

Findings:
None of the companies involved (except Foothold Technology) is doing a particularly good job with event marketing. Several companies have found the value of webinars but are not doing them consistently nor promoting them properly. As far as user groups, three companies are utilizing the to develop a community that will create both stickiness and a source of referrals and information.

Events can play a critical role in any lead and demand generation program; Effective event marketing must feed and support the entire lead and demand generation lifecycle.



INDUSTRY EVENTS

Industry events present an excellent opportunity to attract and capture targeted personas who are unaware of your product solutions. The key is to ensure success there needs to be a program at each stage.
Pre-event: Through blogs, emails, social and paid demand generation create a buzz ensure the attendees are excited to visit your presentation and booth.
Event: Be one of the principle presenters at the event. Provide incentives for them to register or sign up for a free trial. Use geo-marketing to promote the event at the convention center and any adjacent restaurants or hotels. Post-event: Effective follow up to all attendees and those who signed up for free trials.

Company events are usually best suited for those who are already aware of the brand. It offers the opportunity to convert those who are attending and reinforce the value to current customers. At such events, influencer marketing is critical. Having

customers speak to how your product improved their business or profitability will go a long way to a successful outcome. Letting attendees in on any roadmap for product improvement also serves to build trust and create sense of a vibrant community.



WEBINARS

Webinars are best used in the sales enablement process for individuals who have either shown an interest by a website interaction or are in the process of a free trial subscription. Webinars will allow them to see the full functionality of the software and ask any questions. Getting attendance at the webinars requires a series of sales enablement activities and the active involvement of a professional sales team to follow up by phone and email before and after the event.



USER GROUPS

Retention of current customers is critical to the success of any SaaS company. User groups both build a community and allow individuals to learn tricks and techniques which will allow the more efficient use of the product. Having user groups in major metropolitan areas that are supported both by corporate attendance and financial support will create a sense of community that will keep the SaaS community vibrant. Providing swag and food/drink during events will ensure a high level of attendance.

There are several key marketing initiatives for each area of event marketing that are require for a successful outcome. It is impossible to evaluate whether these initiatives have been adopted without interviewing company representatives. However, this is a key are that needs to be addressed.

Recommendations:

Industry events take revenue to attend a participate properly. When HealthBiller has sufficient revenue, they will need to participate in these events. This is more than showing up with a booth. There are pre and post marketing events that need to be implemented to ensure the success of the program. In all cases, there should be an effort to be a formal presenter at any event that is worth attending.

Webinars can be an excellent source of lead generation, nurturing, and client retention. A monthly webinar should be started that is NOT product oriented. Eighty percent (80%) of the webinar should be how to help a practice be more efficient, attract customers, or about best practices. Twenty percent (20%) of the Webinar should showcase how HealthBiller can be used to accomplish those issues.

A webinar should also be done for every product release but include a tricks and tips segment that will be seen as more valuable than just watching a new feature roll out.

HealthBiller should implement a certification program for users. They should have a special event just for those who are certified to use the program. This can be create a sense of community and result in a source of referrals.

Email Marketing

NOTE: The email marketing practices of HealthBiller are not ascertainable until access is given to their marketing automation program. At such time an in-depth analysis should be made.

Email marketing is up to 40 times more effective than social media, per a study done by McKinsey & Company. The same study also shows that the buying process happens 3 times faster than in social media. Statistically, there are indicators that show the growing potential of email marketing. For the "Big 3" of social media (Facebook, Instagram, and Twitter), the engagement rate isn't even 0.6%**.** Compare that to email's average open rate of 22.86% and even its click-through rate of 3.71%**.**

Email Marketing serves five distinct functionalities:

- New Customer Acquisitions
- Transactional Emails
- Lead Nurturing Emails
- Sales Enablement Emails
- Client Retention Emails

We will deal with new customers' acquisitions and transactional emails in this section the remaining three will be done in a later section.

Email Customer Acquisition: Co-branded Emails

One of the most effective ways to use emails to find new leads is through co-branded emails of third-party influencer lists. It combines the best of influencer marketing with the impact of emails. There are many highly influential magazines that B2B targeted personas receive valuable information and content on a regular basis. They have come to respect and trust these publications to help keep them informed and current on best to operate their business.

The compelling nature with a co-branded email is that you find a publication that will resonate with your targeted buyer personas and you have them send one or several emails under their banner. Since the recipient trust the source of these emails the open

and conversion rates are substantially higher. The trust the email recipient has for publication is transferred to HealthBiller. Often publications will guarantee an open and click through rate. This is an excellent opportunity to adding a guaranteed number of contacts to your database for future nurturing.

Email Customer Acquisition: Transactional Emails

What are Transactional Emails?

My definition is that they are the most anticipated boring emails you ever receive. Transactional emails include:

- Welcome emails
- Shipping notification
- Order Confirmation
- Password Reset
- Payment Confirmation

The Power of Transactional Emails

Transactional emails have 8x more opens and clicks than any other type of email and can generate 6x more revenue (Experian). Adding quality content (e.g. infographic or video) to a transactional email means that it will be opened and viewed where a sales email might not.

Studies have shown where SaaS companies have incorporated the use of transitional emails, they have increased sales by upward of 34%.

Findings:

Without having access to HealthBiller's marketing automation platform, it is not possible to draw any actionable findings how they are performing.

Recommendations:

A comprehensive evaluation of current practices for both acquisitional and transactional emails needs to be conducted and appropriate action taken.

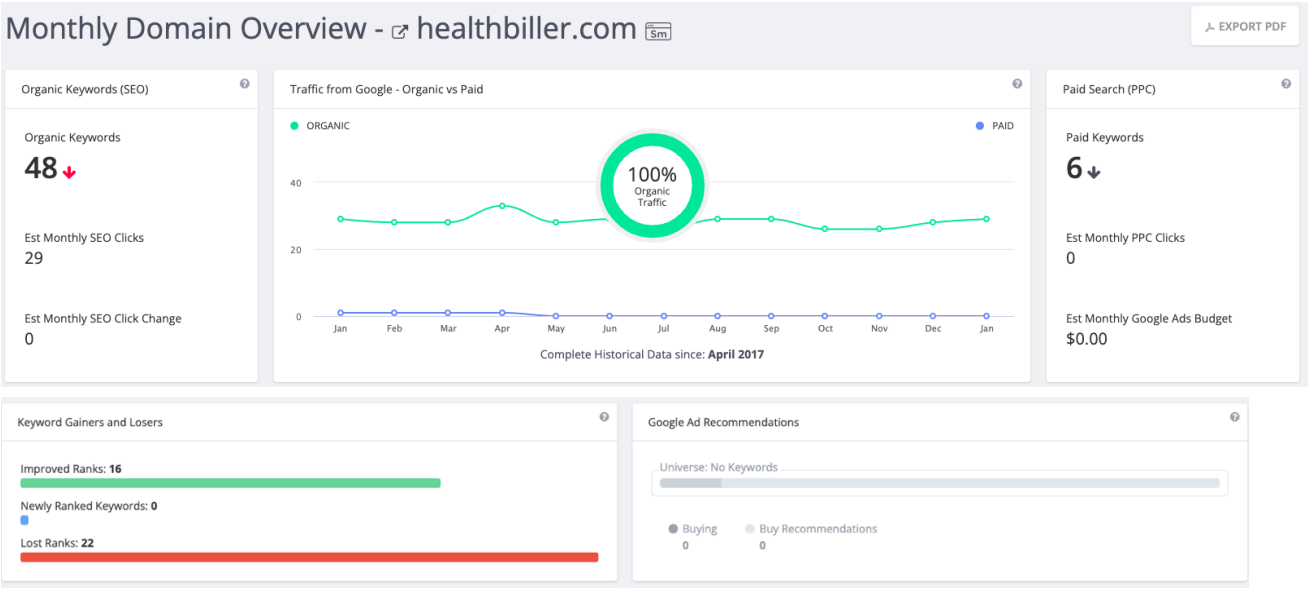
However, several industry best practices should be implemented. All leads, SQLs, and customer should be segmented by buyer persona before ANY emails are sent. It is critical that if a person receives and email from HealthBiller that they find it to both relevant and compelling. Before sending ANY email make sure that you are looking at it from the perspective of the user, will the find it useful and relevant. If the answer is no to either do not send it.

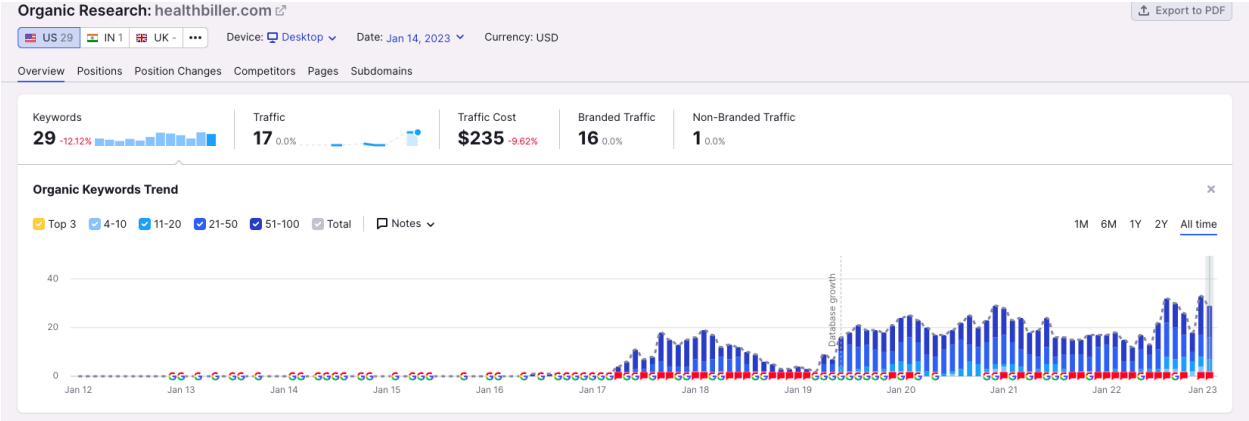
Test every email before it is sent to ensure both deliverability. This is used to gauge the likelihood of the email reaching the subscribers' inboxes related to actual delivery – like ISPs, throttling, bounces, spam issues, and bulking.

Pay attention of bounces and resolve them immediately. If the open rate is below industry average reevaluate what you are sending or how often you are sending information.

When budget allows take advantage of co-branded email campaigns but always send top of the funnel educational/informational content to capture the contact information of the recipient.

Organic Traffic





Top Organic Keywords

Keyword	Pos.	Diff.	Volume	Traffic %
healthbiller	1 → 1	0	20	94.11
direct primary care software	4 → 4	0	20	5.88
dpc emr	22 → 22	0	20	< 0.01
ehr for direct primary care	14 → 14	0	20	< 0.01
biller website	94 → 94	0	20	< 0.01
patient intake management software	92 → 92	0	30	< 0.01
billing made easy	61 → 61	0	20	< 0.01

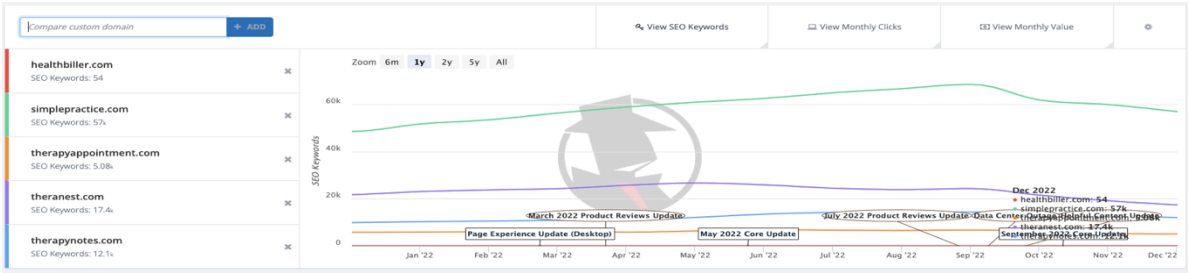
Keywords by Intent

Intent		Keywords	Traffic
Informational	27%	10	0
Navigational	24.3%	9	16
Commercial	18.9%	7	1
Transactional	29.7%	11	0

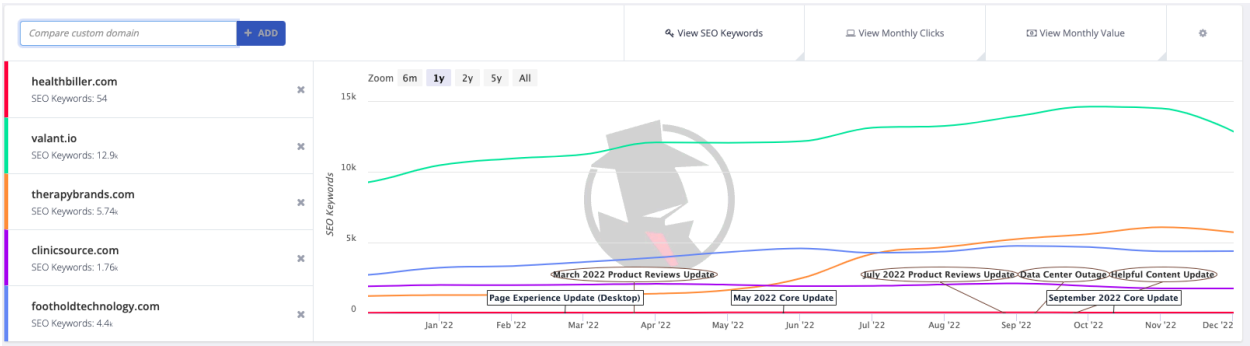
To be successful in getting organic traffic HealthBiller must first understand their competitor's strategy and then implement one that takes advantage of their respective weakness. This is an on-going and weekly analysis that requires an SEO and Keyword expert to provide weekly guidance that is then used for the generation of content and social media interactions. Below is a snapshot in time over 1-2 years with selected competitors from the list we have been using.

HealthBiller is significantly trailing every one of its competitors is obtaining organic traffic.

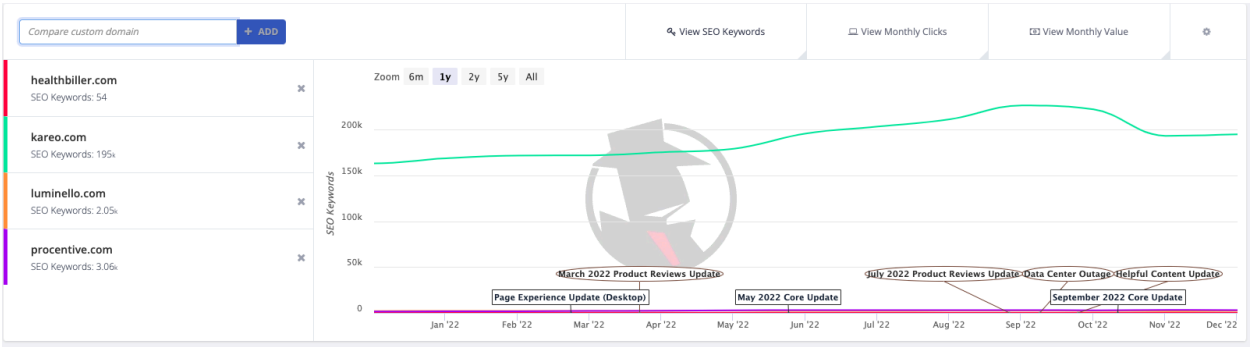
One Year Recap



Domain	Overlap	Common Keywords	Number of Keywords	Monthly Clicks	Monthly Value of Clicks
healthbiller.com	-	-	54	28	$47.48
simplepractice.com	-	-	57k	51.8k	$209k
therapyappointment.com	-	-	5.08k	5.77k	$20.4k
theranest.com	-	-	17.4k	13.8k	$65.2k
therapynotes.com	-	-	12.1k	12.6k	$48.9k



Domain	Overlap	Common Keywords	Number of Keywords	Monthly Clicks	Monthly Value of Clicks
healthbiller.com	-	-	54	28	$47.48
valant.io	-	-	12.9k	14.7k	$56k
therapybrands.com	-	-	5.74k	5.32k	$27.9k
clinicsource.com	-	-	1.76k	2.09k	$17.1k
footholdtechnology.com	-	-	4.4k	4.44k	$26.1k
therapynotes.com	-	-	12.1k	12.6k	$48.9k



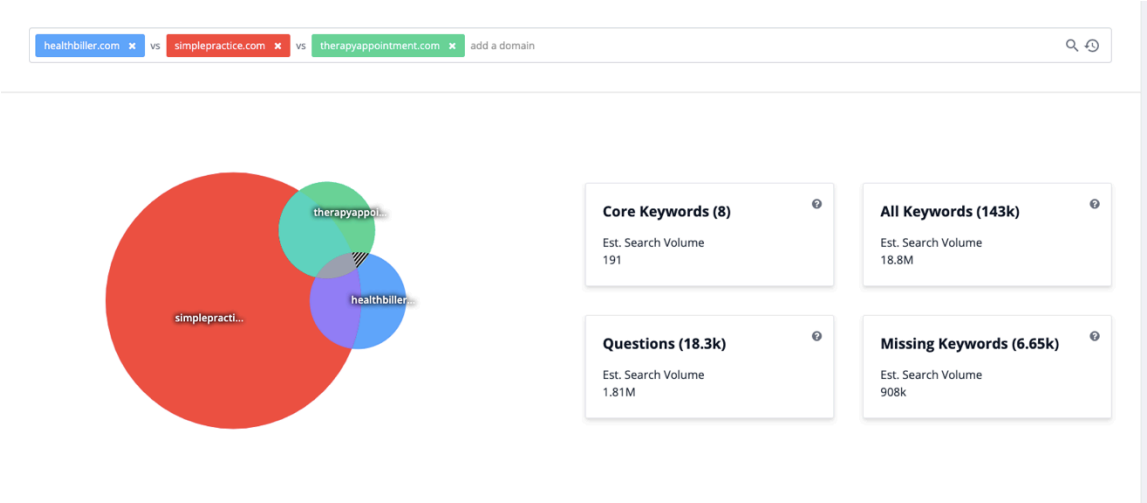
Domain	Overlap	Common Keywords	Number of Keywords	Monthly Clicks	Monthly Value of Clicks
healthbiller.com	-	-	54	28	$47.48
kareo.com	-	-	195k	94.6k	$648k
luminello.com	-	-	2.05k	2.03k	$14.2k
procentive.com	-	-	3.06k	3.24k	$15.1k
valant.io	-	-	12.9k	14.7k	$56k
therapybrands.com	-	-	5.74k	5.32k	$27.9k

Another chart compares these same competitors and clearly demonstrates that HEALTHBILLER has the need to create and distribute significantly more content in order to capture market share.

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ORGANIC TRAFFIC KEYWORD COMPARISON

HealthBiller is the Blue Circle
Simple Practice is the Red Circle
Therapy Appointment is the Green Circle



The takeaway from this chart is that there are 143K keywords that are part of the keyword universe for these three companies and only 8 of those keywords do all three companies rank. Both competitors are fighting over 6,654 keywords that HealthBiller does not have any ranking. HealthBiller has 83 unique keywords it ranks for (mostly branded keywords).

This means that there are 6,654 keywords both these two competitors believe to be instrumental in their respective businesses that HealthBiller does not rank.

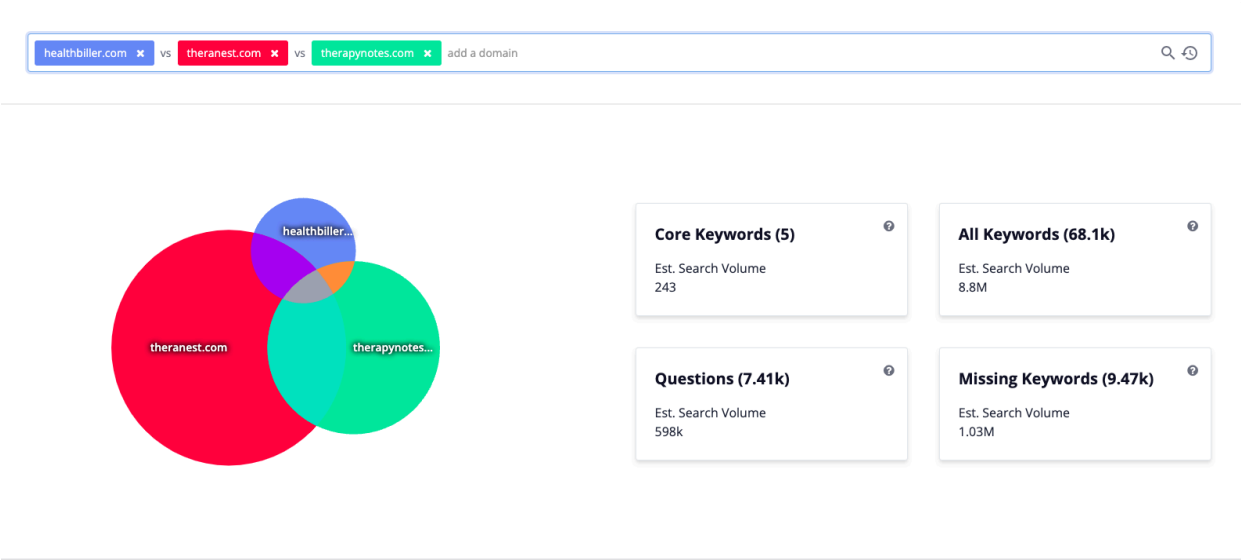
The core keywords everyone ranks for are:

Keywords: 8 **Est Search Volume:** 191

Keyword	Volume	KD	CPC (B)	Organic Clicks	Not Clicked
square appointment reminders	135	34	-	-	-
be your own biller	44	17	-	-	-
primary secondary tertiary insurance	12	52	-	-	-
primary, secondary tertiary insurance	-	96	-	-	-
text patient self-scheduling	-	17	-	-	-

ORGANIC TRAFFIC KEYWORD COMPARISON

HealthBiller is the Blue Circle
TheraNest is the Red Circle
TherapyNotes is the Green Circle



The takeaway from this chart is that there are collectively 68.1K keywords that are part of the keyword universe for these three companies and only 5 that they all rank. Both competitors find 9,469 organic keywords that HealthBiller is not ranking for. HealthBiller has 108 exclusive keywords that it ranks for (mostly branded keywords).

This means that there are 9,469 keywords these both competitors believe to be instrumental in their respective businesses that HealthBiller does not rank.

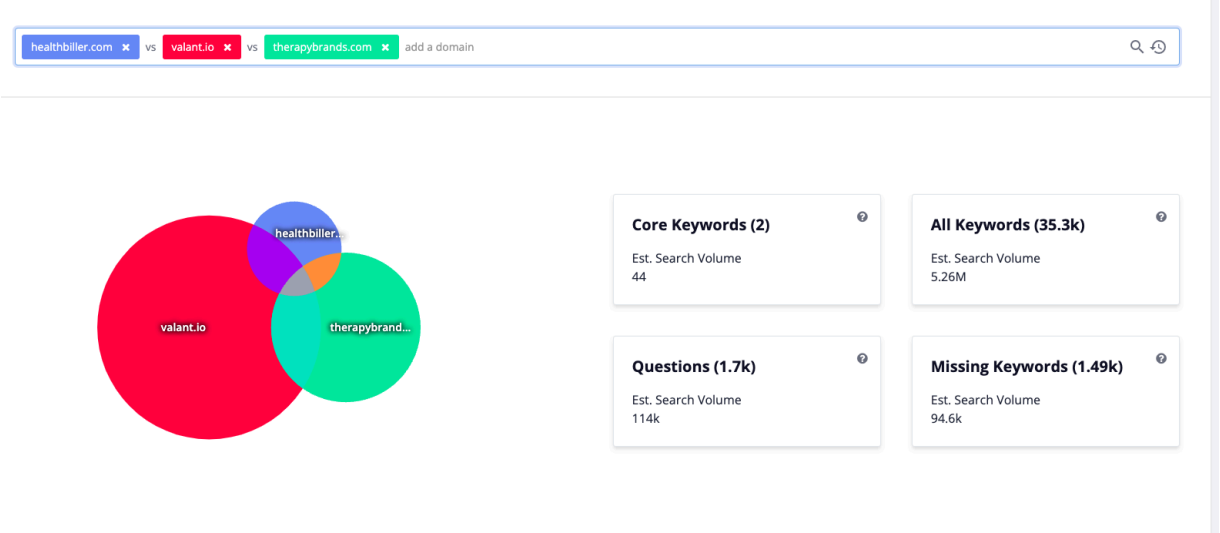
The core keywords everyone ranks for are:

Keywords: 5 **Est Search Volume:** 243

Keyword	Volume	KD	CPC (B)	Organic Clicks	Not Clicked
free ehr with direct messaging	155	43	-	-	-
practice management systems llc	44	75	-	-	-
be your own biller	44	17	-	-	-
the electronic biller billing tools	-	39	-	-	-
The Electronic Biller Pricing	-	35	-	-	-

ORGANIC TRAFFIC KEYWORD COMPARISON

HealthBiller is the Blue Circle
Valant is the Red Circle
Therapy Brands is the Green Circle



The takeaway from this chart is that there are collectively 35.3K keywords that are part of the keyword universe for these three companies and only 5 that they all rank. Both competitors find 1,493 organic keywords that HealthBiller is not ranking for. HealthBiller has 107 exclusive keywords that it ranks for (mostly branded keywords).

This means that there are 1,493 keywords these both competitors believe to be instrumental in their respective businesses that HealthBiller does not rank.

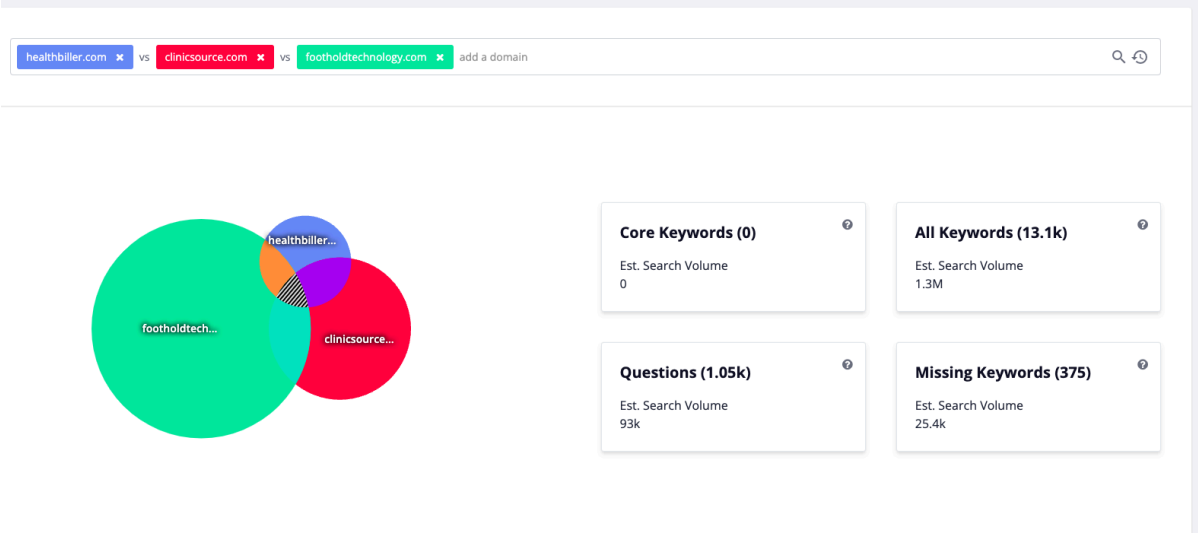
The core keywords everyone ranks for are:

Keywords: 2 **Est Search Volume:** 44

Keyword	Volume	KD	CPC (B)	Organic Clicks	Not Clicked
be your own biller	44	17	-	-	-
total practice management billing integration	-	22	-	-	-

ORGANIC TRAFFIC KEYWORD COMPARISON

HealthBiller is the Blue Circle
Clinic Source is the Red Circle
Foothold Technology is the Green Circle

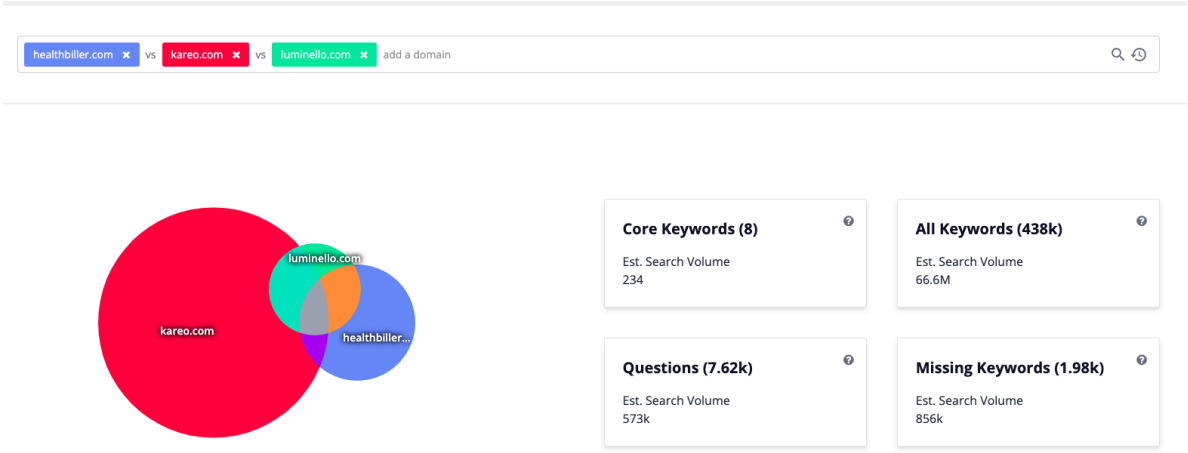


The takeaway from this chart is that there are collectively 13.1 keywords that are part of the keyword universe for these three companies and only 0 that they all rank. Both competitors find 375 organic keywords that HealthBiller is not ranking for. HealthBiller has 124 exclusive keywords that it ranks for (mostly branded keywords).

This means that there are 375 keywords these both competitors believe to be instrumental in their respective businesses that HealthBiller does not rank.

ORGANIC TRAFFIC KEYWORD COMPARISON

HealthBiller is the Blue Circle
Kareo is the Red Circle
Luminello is the Green Circle



The takeaway from this chart is that there are collectively 438K keywords that are part of the keyword universe for these three companies and only 8 that they all rank. Both competitors find 1,984 organic keywords that HealthBiller is not ranking for. HealthBiller has 77 exclusive keywords that it ranks for (mostly branded keywords).

This means that there are 1,984 keywords these both competitors believe to be instrumental in their respective businesses that HealthBiller does not rank.

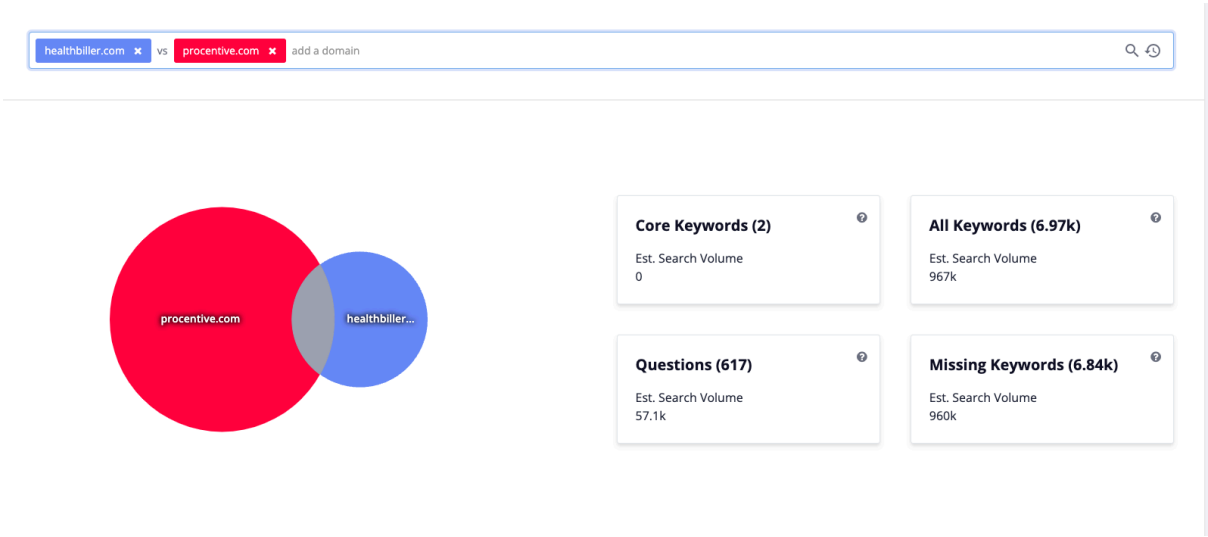
The core keywords everyone ranks for are:

Keywords: 8 **Est Search Volume:** 234

Keyword	Volume	KD	CPC (B)	Organic Clicks	Not Clicked
free ehr with direct messaging	155	43	-	-	-
be your own biller	44	17	-	-	-
in touch biller pro	24	21	-	-	-
what adds up to form a practice's accounts receivable	11	21	-	-	-
the electronic biller billing tools	-	39	-	-	-

ORGANIC TRAFFIC KEYWORD COMPARISON

HealthBiller is the Blue Circle
Procentive is the Red Circle



The takeaway from this chart is that there are collectively 6.97K keywords that are part of the keyword universe for both companies and only 2 that they all rank. Procentive has 6,481 organic keywords that HealthBiller is not ranking for. HealthBiller has 127 exclusive keywords that it ranks for (mostly branded keywords).

The core keywords everyone ranks for are:

Keywords: 2 **Est Search Volume:** 0

Keyword	Volume	KD	CPC (B)	Organic Clicks	Not Clicked
The Electronic Biller Pricing	-	35	-	-	-
the electronic biller billing integration	-	35	-	-	-

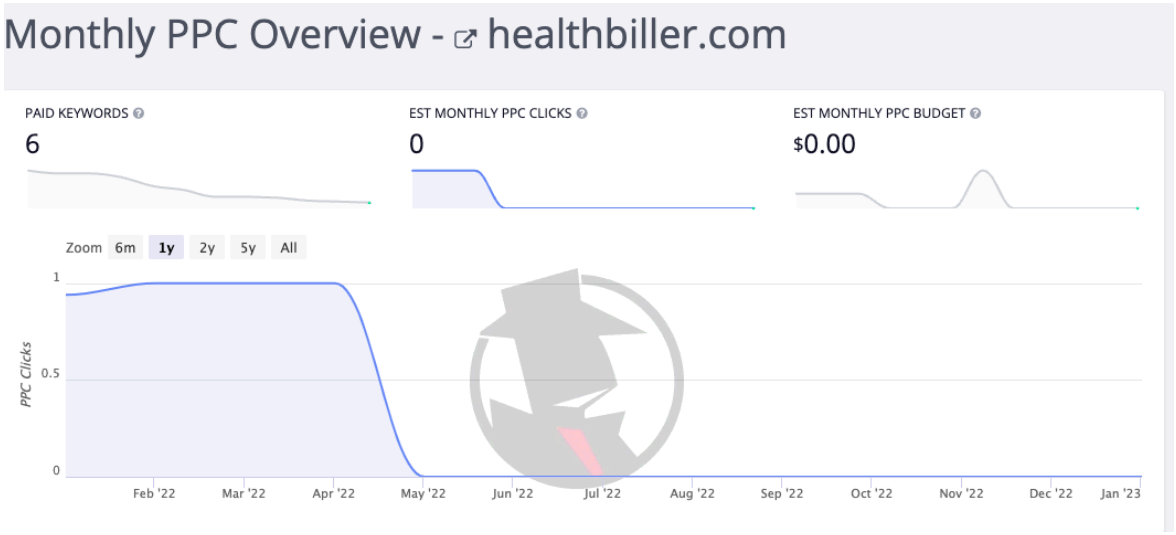
Findings:

HealthBiller is not creating enough content on its website or for distribution on the internet to effectively compete for organic traffic. They are not taking advantage of competitive keywords that other competitors find valuable. Organic keyword ranking is in large part a reflection of the amount and type of content a company creates and how it distributes and shares that content. This is done through blogging, social media, and evergreen premium content.

Organic Keywords Recommendations:

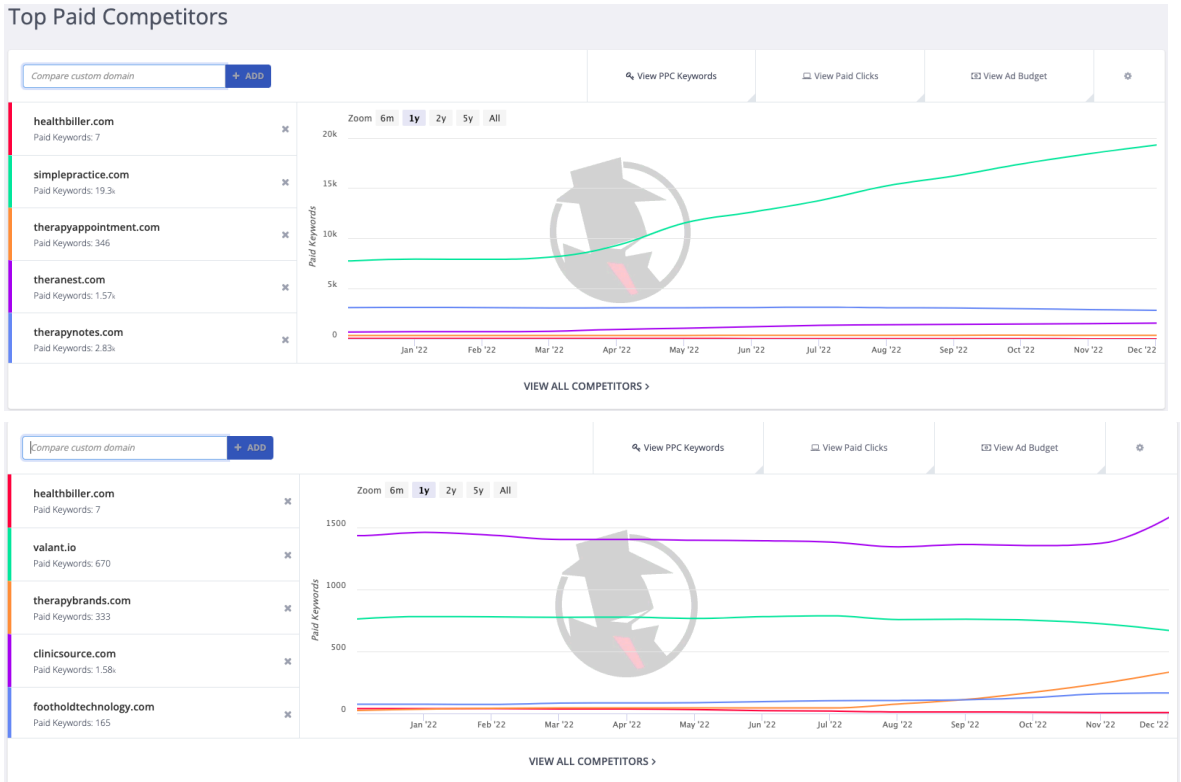
HealthBiller needs to take a more active role in creating content of all types (blogs, social, evergreen) and distribute and share that content across their own ecosystem and through influencers and earned media. HealthBiller needs to balance their branded keywords with that of generic terms and competitive keywords. The use of SpyFu will allow HealthBiller to learn what key words are most impactful and then naturally introduce them into their content.

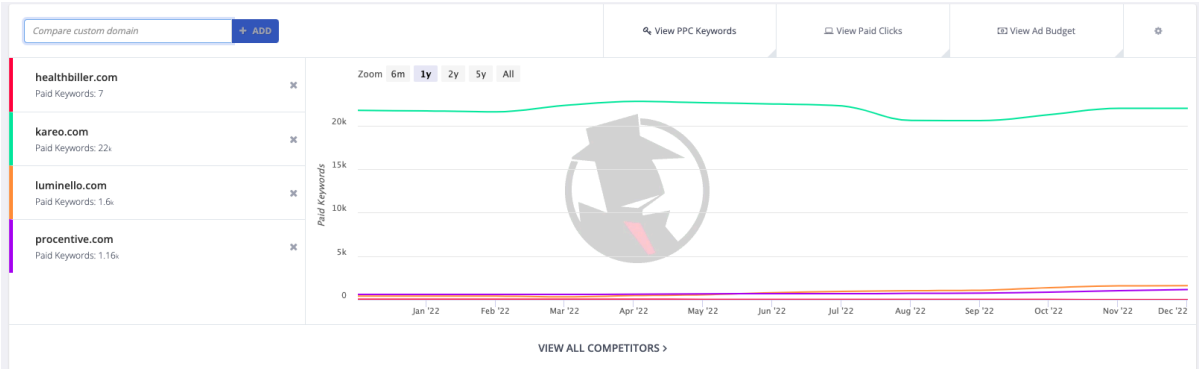
Paid Keyword Analysis
sis



PPC is a critical part of any SaaS marketing strategy. The snapshot below is that of several of your competitors who rely significantly on paid keyword promotion. The chars reflect a time-period over 1 year with selected competitors from the list we have been using.

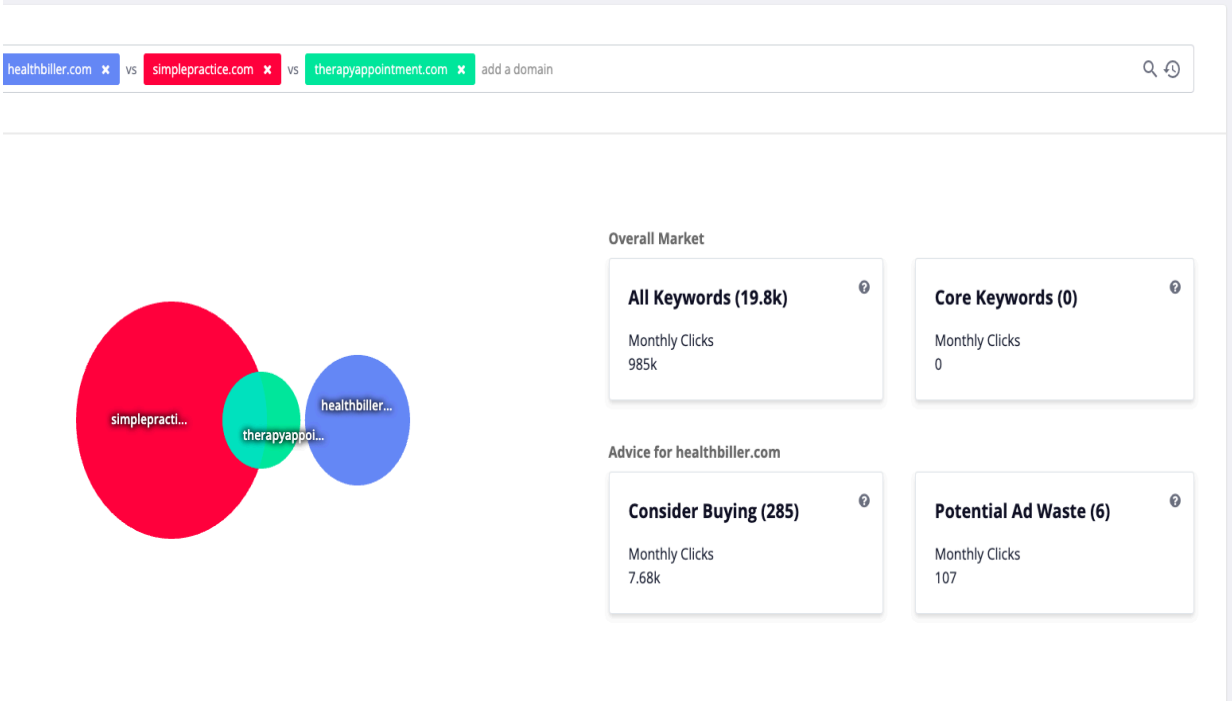
One Year Recap





It is important to note that HEALTHBILLER is significantly trailing every one of its competitors is obtaining paid traffic.

PAID TRAFFIC KEYWORD COMPARISON
HealthBiller is the Blue Circle
Simple Practice is the Red Circle
Therapy Appointment is the Green Circle

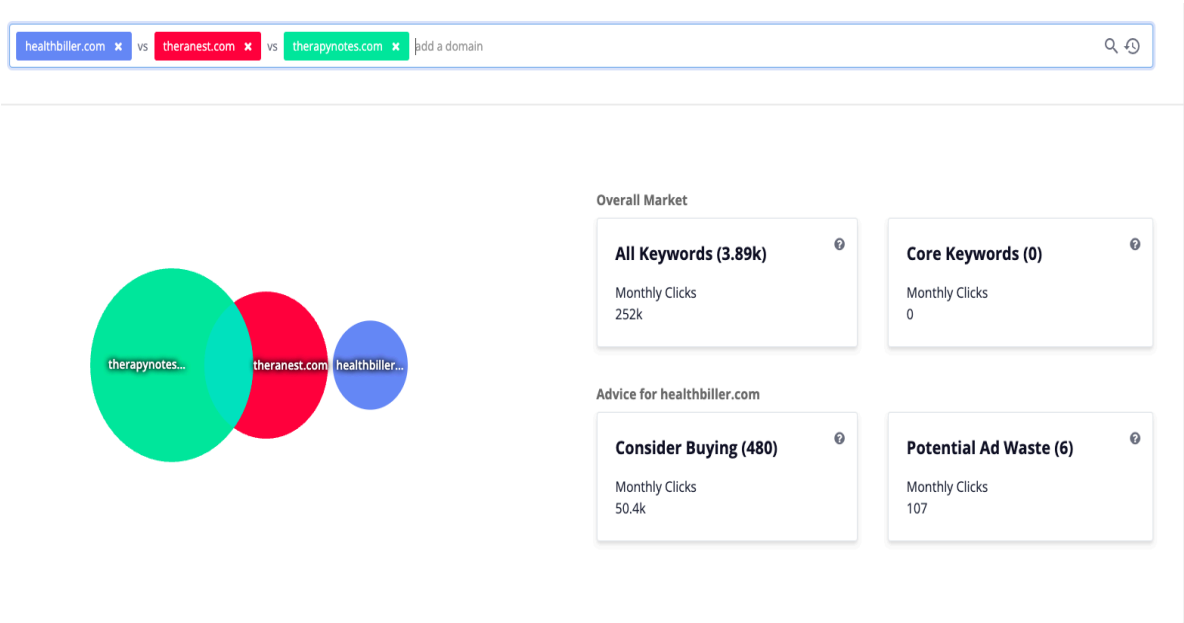


The takeaway from this chart is that there are 19.8K paid keywords that are part of the keyword universe and there is zero commonality for of those keywords for all three companies buy. Both competitors are fighting over 285 paid keywords that HealthBiller does not have any ranking. HealthBiller has 11 unique paid keywords it buys that none of their competitors found useful.

This means that HealthBiller is totally off base with their ad spend.

PAID TRAFFIC KEYWORD COMPARISON

HealthBiller is the Blue Circle
TheraNest is the Red Circle
TherapyNotes is the Green Circle

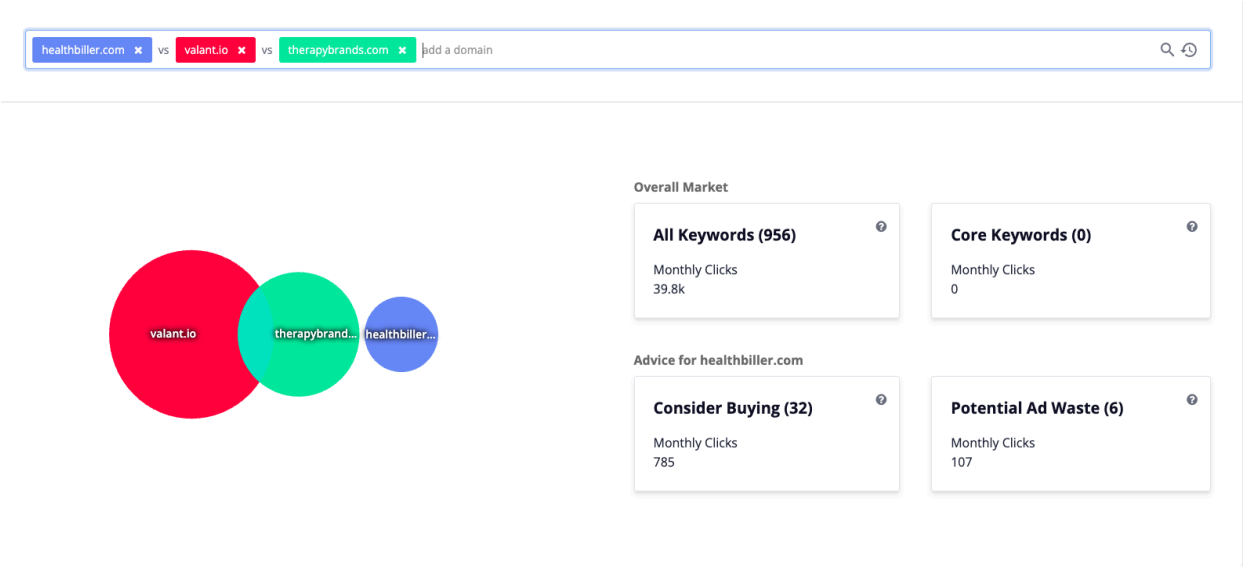


The takeaway from this chart is that there are 3.89K paid keywords that are part of the keyword universe and there is zero commonality for of those keywords for all three companies buy. Both competitors are fighting over 480 paid keywords that HealthBiller does not have any ranking. HealthBiller has 6 unique paid keywords it buys that none of their competitors found useful.

This means that HealthBiller is totally off base with their ad spend.

PAID TRAFFIC KEYWORD COMPARISON

HealthBiller is the Blue Circle
Valant is the Red Circle
Therapy Brands is the Green Circle

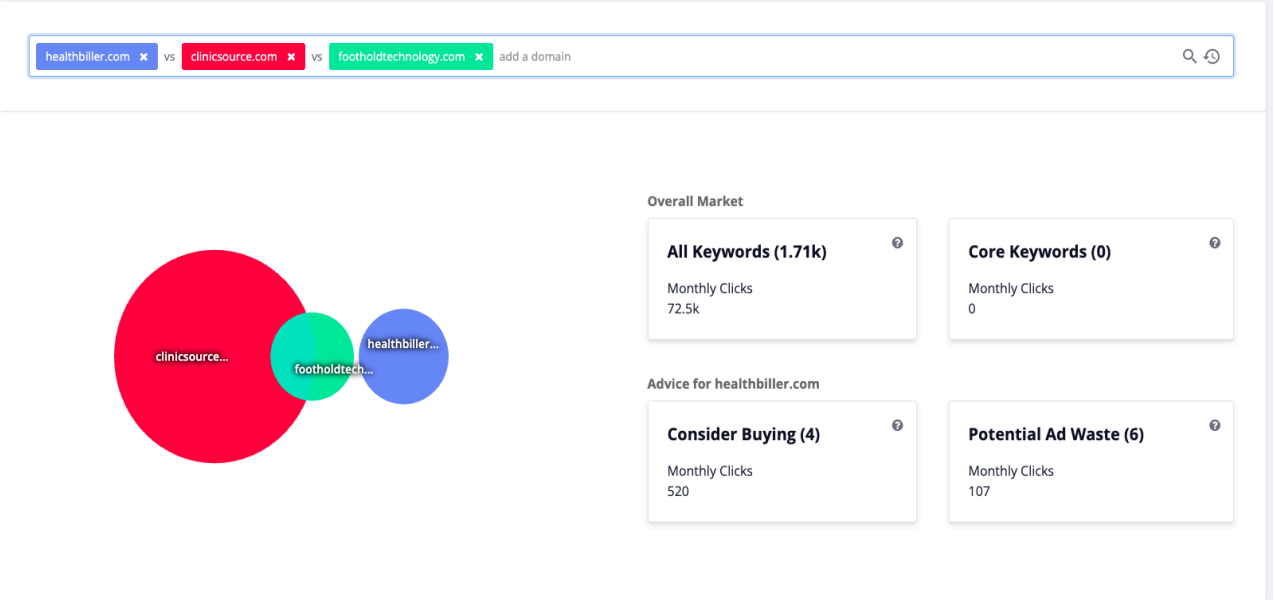


The takeaway from this chart is that there are 956 paid keywords that are part of the keyword universe and there is zero commonality for of those keywords for all three companies buy. Both competitors are fighting over 32 paid keywords that HealthBiller does not have any ranking. HealthBiller has 6 unique paid keywords it buys that none of their competitors found useful.

This means that HealthBiller is totally off base with their ad spend.

PAID TRAFFIC KEYWORD COMPARISON

HealthBiller is the Blue Circle
Clinic Source is the Red Circle
Foothold Technology is the Green Circle

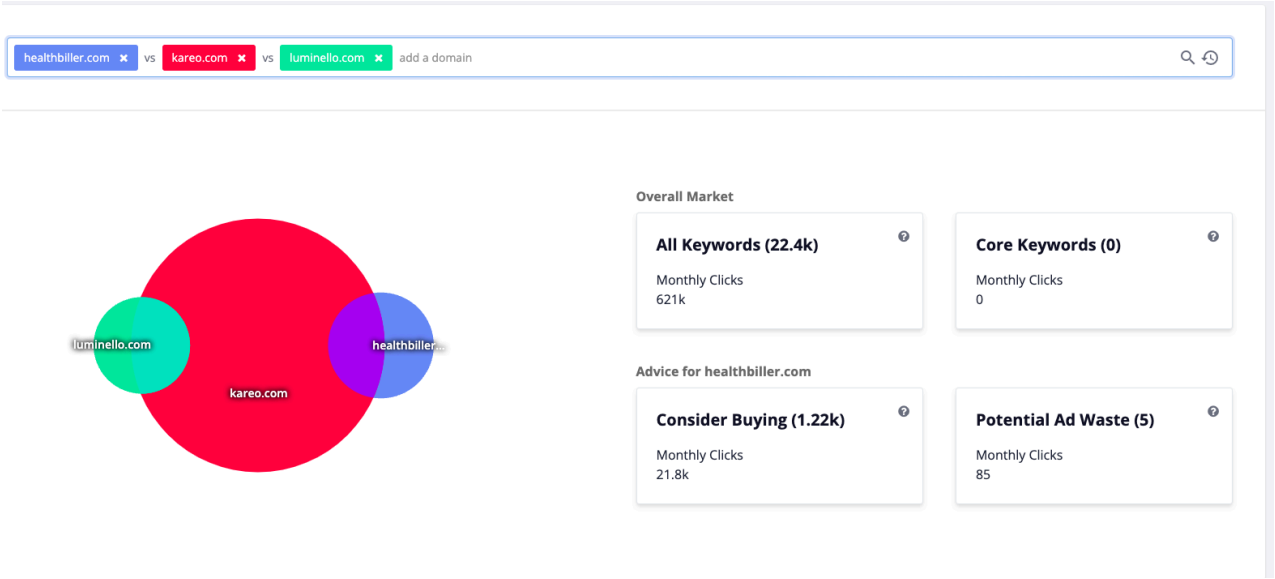


The takeaway from this chart is that there are 1.71Kpaid keywords that are part of the keyword universe and there is zero commonality for of those keywords for all three companies buy. Both competitors are fighting over 4 paid keywords that HealthBiller does not have any ranking. HealthBiller has 6 unique paid keywords it buys that none of their competitors found useful.

This means that HealthBiller is totally off base with their ad spend.

PAID TRAFFIC KEYWORD COMPARISON

HealthBiller is the Blue Circle
Kareo is the Red Circle
Luminello is the Green Circle

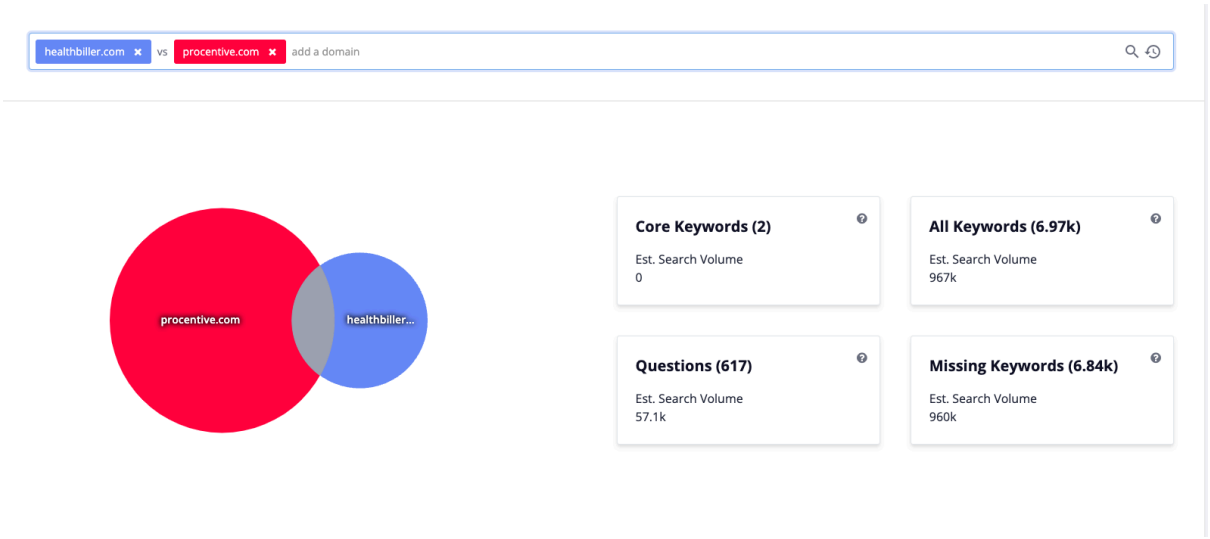


The takeaway from this chart is that there are 22.4K paid keywords that are part of the keyword universe and there is zero commonality for of those keywords for all three companies buy. Both competitors are fighting over 1,221 paid keywords that HealthBiller does not have any ranking. HealthBiller has 5 unique paid keywords it buys that none of their competitors found useful. HealthBiller and Kareo share one paid key word which is a long-tailed keyword “direct primary care emr”.

This means that HealthBiller is totally off base with their ad spend.

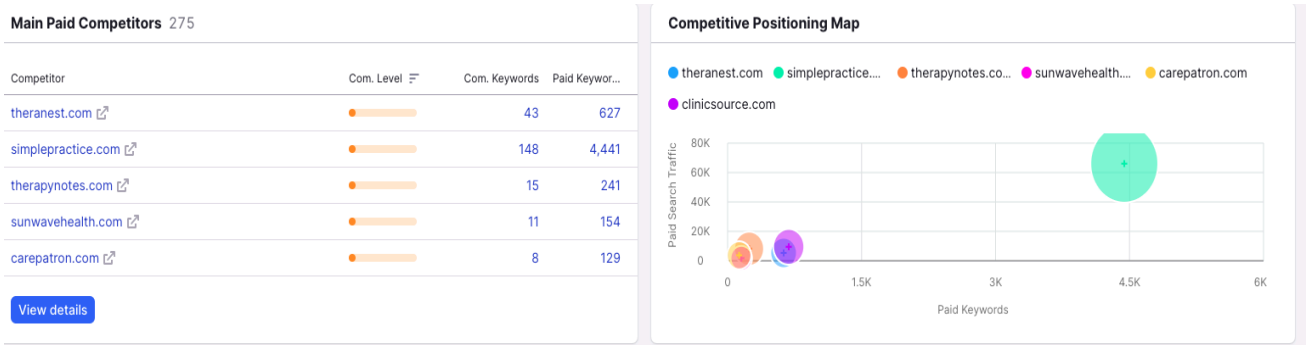
PAID TRAFFIC KEYWORD COMPARISON

HealthBiller is the Blue Circle
Procentive is the Red Circle

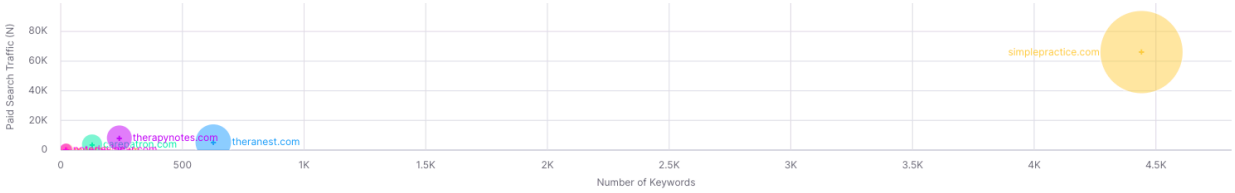


The takeaway from this chart is that there are collectively 1.21K keywords that are part of the keyword universe for both companies and only 0 that they all use. Procentive has 1,280 paid keywords that HealthBiller is not trying to get. HealthBiller has 6 exclusive keywords that it is paying for.

This means that HealthBiller is totally off base with their ad spend.



Competitive Positioning Map



Display Ads

Display ads

Domain	Total traffic	Desktop	Mobile
healthbiller.com	N/A	N/A	N/A
simplepractice.com	0.06%	98.31%	1.69%
therapyappointment....	0.02%	84.12%	15.88%
theranest.com	0.06%	93.82%	6.18%
therapynotes.com	0.14%	97.31%	2.69%

healthbiller.com vs. simplepractice.com therapyappointment.com theranest.com therapynotes.com

Display Ad Network

Oct 2022 - Dec 2022 Worldwide Desktop

Ad Network	Total Group Traffic Share	Group Traffic Share Split
Google Display Network	82.45%	52.9% / 34.9%
Yahoo Advertising	13.99%	14.3% / 85.7%
Unidentified Networks	0.26%	100%
TripleLift	3.30%	100%

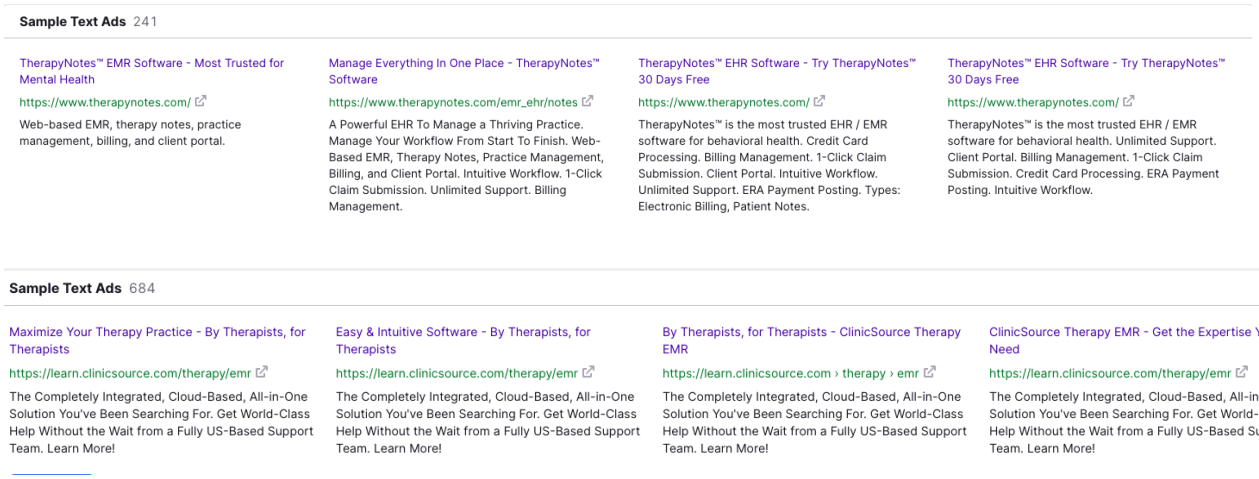
Display Advertising

therapynotes.com is in the lead with **<1%** display ads traffic

Top publishers

Oct 2022 - Dec 2022 Worldwide Desktop

Publisher	Total Share	Group Traffic Share Split
crazygames.com	6.03%	100%
dmv-test-pro.com	6.63%	100%
msn.com	14.45%	14.3% / 85.7%
native-languages.org	1.01%	100%
freegames.one	1.01%	100%



TherapyNotes has placed a greatest emphasis using display ads.

Findings:

There is an art and science in utilizing paid advertising. It is never about simply throwing more money at the problem. It is about micro analysis to ensure that you are capturing the most productive keywords, long-tail keywords, and branded competitive keywords. It requires extensive A/B testing and performance evaluation. Even if you succeed and able to bring your targeted personas back to your website or landing page, you must capture their imagination and facilitate them taking a free trial or downloading gated content.

Without access to HealthBiller's Google AdWords account, it is not possible to fully evaluate the paid advertisement program.

Recommendations:

There needs to be a comprehensive analysis for the paid advertisement that is being done by HealthBiller to determine its effectiveness. Consideration should also be given to trying artificial intelligence services such as Albert.

Retargeting Leads

Once you develop a significant contact list and or web traffic who has not engaged, we will begin retargeting them with Display Ads across the Internet. We recommend retargeting website visitors to keep them engaged and interested in returning to the site for more relevant content on a regular basis. Immediately after signing up for a retargeting service like Perfect Audience, users download a site tracking tag to add to your website. This tracking tag is a JavaScript code snippet you add on every page of your web site. Once added, the tracking tag places an anonymous cookie in the browser of every person who visits your site.

Now that your visitors have been tagged with a unique "cookie," the platform searches for them across Facebook and websites in the network and serves your ads to them. The ads we would place would be content or event promotions.

Perfect Audience does this by having partnerships with all the major ad networks on the web, like Facebook, Google Display Network, OpenX, Pubmatic and many more. When someone with your site's cookie loads a web page anywhere on the Internet that has an ad from a network working with Perfect Audience, the platform "sees" them and can then serve up your ad in that space instead of whatever other ad would have normally appeared.

With retargeting campaigns, because we're reaching people who have already shown a prior interest in your offering, the ads are clicked 200-400 percent more often. No matter how memorable or interesting your business, most people who visit your site are going to leave without signing up, buying or contacting you. Retargeting keeps your brand in front of them after they leave, giving you a second, third, even fourth chance to bring them back to convert.

Lookalike Targeting of Leads

Lookalike targeting works in a similar fashion as retargeting except we use third-party software that can identify and match up the key attributes (income, title, location, etc.) that are found in our best clients. This is a means of highly targeting potential clients who are currently not part of our database.

Traffic Overview Analysis

Numbers and metrics do not lie and any marketer who does not understand where and what is originating traffic to their site is simply guessing.

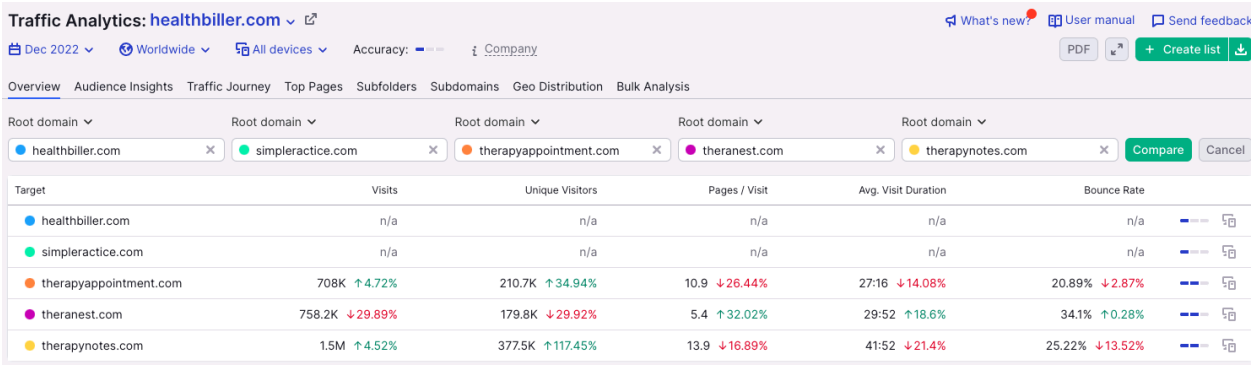
A true demand and lead generation strategy accounts for every touchpoint in the buyer’s journey; all the way from anonymous web surfer to a delighted customer. In executing an effective demand and lead generation strategy, you create opportunities: opportunities to make data-driven decisions, align your marketing and sales teams,

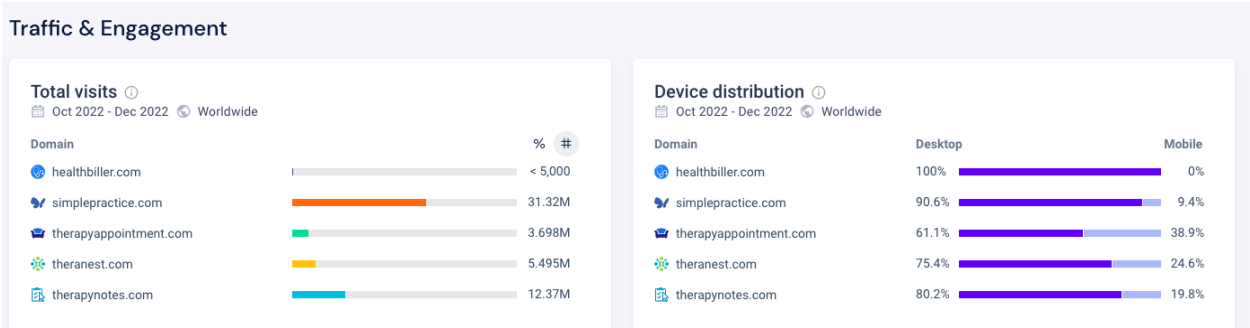
track marketing's contribution to revenue and, most importantly, drive growth for your organization.

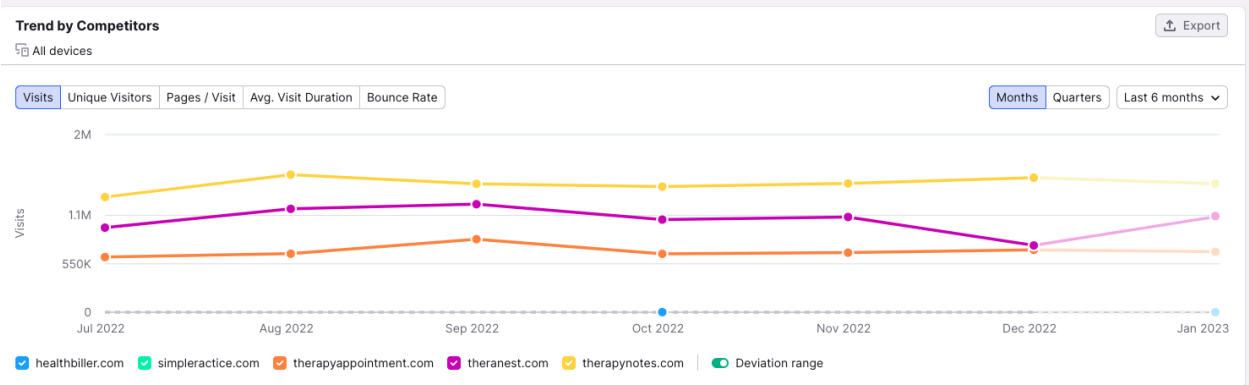
Website traffic is a key performance indicator that tells you the health of your marketing efforts as well as a predictor of future success. An analysis of HealthBiller and its competitors shows that HealthBiller is at the bottom in their reach both internationally and domestically.

Company	URL	Behavioral Health Focus	Total Visits Similarweb	Total Monthly Visits Similarweb	Monthly Unique Visitors Similarweb	Visits/Unique Visits Similarweb	Global Rank Similarweb	Country Rank Similarweb	Industry Rank Similarweb
HealthBiller	HealthBiller.com	X	<5000	<5,000	<5000	1.00	16,832,297	4,897,880	N/A
ClinicSource	clinicsource.com	Features	1.653M	551,282	32,524	16.95	97,582	17,156	N/A
Foothold	footholdtechnology.com	Features	1.090M	363,532	35,943	10:11	85,743	15,918	91
Kareo	Kareo.com	Features	8.154 Million	2.718 Million	747,293	3.64	13,067	2,442	160
Luminello	Luminello.com	Dedicated	1.400M	466,840	69,204	6.75	90,119	17,177	98
Procentive (Therapy Brands)	Procentive.com	Dedicated	1.199M	399,899	28,913	13.83	112,564	20,027	123
SimplePractice	Simplepractice.com	Features	31.75M	10.58M	1.552M	6.82	869	N/A	N/A
Therapy Appointment	therapyappointment.com	Dedicated	3.737M	1.245M	213,202	5.84	38,506	6,987	35
TheraNest (Therapy Brands)	TheraNest.com	Dedicated	5.748M	1.916M	240,452	7.97	21,671	4,089	14
TherapyNotes	Therapynotes.com	Dedicated	12.29M	4.099M	281,847	14.55	16,832,297	2,044	6
Valant EHR Suite	Valant.io	Dedicated	2.601M	867,131	170,869	5.07	41,789	8,006	N/A
Therapy Brands	therapybrands.com	Dedicated	81,298	27,309	N/A	N/A	1,280,788	245,502	906

SimilarWeb and SEMrush– provide similar data in but reflects their information in traffic to each website.



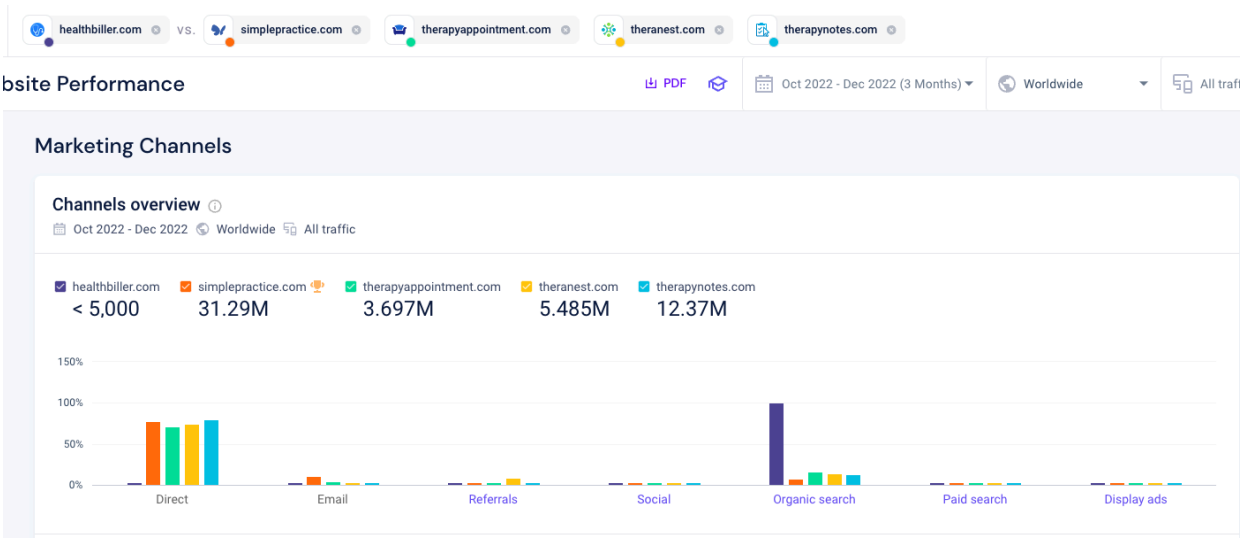




Findings:

HealthBiller's ranking is extremely poor. SimilarWeb and SEMrush has similar data and both reflect the need to increase market share, revenue and profitability, HealthBiller will need to implement a comprehensive marketing program that provides improvements in their website, mobile presence, paid demand generation, influencer marketing, earned media and social engagement.

Traffic Origination



Direct

Domain	Total traffic	Desktop	Mobile
healthbiller.com	N/A	N/A	N/A
simplepractice.com	77.36%	93.89%	6.11%
therapyappointment....	71.52%	72.65%	27.35%
theranest.com	74.06%	84.15%	15.85%
therapynotes.com	79.37%	87.90%	12.10%

Email

Domain	Total traffic	Desktop	Mobile
healthbiller.com	N/A	N/A	N/A
simplepractice.com	11.25%	99.99%	0.01%
therapyappointment....	4.53%	99.91%	0.09%
theranest.com	2.37%	99.94%	0.06%
therapynotes.com	3.58%	99.96%	0.04%

Referrals

Domain	Total traffic	Desktop	Mobile
healthbiller.com	N/A	N/A	N/A
simplepractice.com	0.54%	34.18%	65.82%
therapyappointment....	2.63%	36.18%	63.82%
theranest.com	8.45%	79.14%	20.86%
therapynotes.com	1.10%	34.73%	65.27%

Social

Domain	Total traffic	Desktop	Mobile
healthbiller.com	N/A	N/A	N/A
simplepractice.com	1.83%	79.48%	20.52%
therapyappointment....	1.90%	30.67%	69.33%
theranest.com	0.95%	30.16%	69.84%
therapynotes.com	0.91%	40.56%	59.44%

Organic search

Domain	Total traffic	Desktop	Mobile
healthbiller.com	100.00%	100.00%	N/A
simplepractice.com	7.85%	57.20%	42.80%
therapyappointment....	16.26%	16.72%	83.28%
theranest.com	13.70%	25.68%	74.32%
therapynotes.com	12.49%	42.79%	57.21%

Paid search

Domain	Total traffic	Desktop	Mobile
healthbiller.com	N/A	N/A	N/A
simplepractice.com	1.12%	54.40%	45.60%
therapyappointment....	3.13%	11.12%	88.88%
theranest.com	0.41%	72.96%	27.04%
therapynotes.com	2.41%	25.62%	74.38%

Display ads

Domain	Total traffic	Desktop	Mobile
healthbiller.com	N/A	N/A	N/A
simplepractice.com	0.06%	98.31%	1.69%
therapyappointment....	0.02%	84.12%	15.88%
theranest.com	0.06%	93.82%	6.18%
therapynotes.com	0.14%	97.31%	2.69%

Findings:

According to each of the metric tools, one hundred percent (100%) of traffic to HealthBiller's website originates as organic traffic, which is also the category that the rank dead last compared to everyone else in their sector.

However, the report still offers some encouraging insights. None of your competitors are doing a good job marketing with either. You will notice that none of the centers is generating traffic from social media/earned media/influencer marketing. Almost all traffic is being generated through search engine marketing and direct links. This creates SIGNIFICANT opportunity for HealthBiller to generate traffic through improvements in their website, mobile presence, paid demand generation, influencer marketing, earned media and social engagement.

Interest Quotient

Company	URL	Pages/Visit	Duration of Visit	Bounce Rate
HealthBiller	HealthBiller.com	Insufficient Traffic	Insufficient Traffic	Insufficient Traffic
ClinicSource	clinicsource.com	16.5	58:49:00	22.16%
Foothold	footholdtechnology.com	5.3	32:20:00	14.94%
Kareo	Kareo.com	5.5	19:55	57.37%
Luminello	Luminello.com	10.8	27:23:00	16.23%
Procentive (Therapy Brands)	Procentive.com	23.2	1:22:15	7.44%
SimplePractice	Simplepractice.com	3.6	36:21:00	47.87%
Therapy Appointment	therapyappointment.com	11	27:31:00	20.30%
TheraNest (Therapy Brands)	TheraNest.com	5.6	31:08:00	32.62%
TherapyNotes	Therapynotes.com	14.1	41:38:00	25.11%
Valant EHR Suite	Valant.io	6.9	34:11:00	31.68%
Therapy Brands	therapybrands.com	1.2	0:46	89.03%

Findings:

There is simply not enough traffic to HealthBiller website for any third party (unconnected) tool to judge the interest quotient. The best performing competitor was Procentive (now Therapy Brands) but they are trying to push traffic to the second worse website Therapy Brands.

The remedy for this is the creation of better and more engaging content (e.g. blogs, videos, eBooks, etc.).

Lead Nurturing Analysis

NOTE: The lead nurturing practices of HealthBiller are not ascertainable until access is given to their marketing automation program. At such time an in-depth analysis should be made.

Lead nurturing is the process of developing relationships with buyers at every stage of the sales funnel, and through every step of the buyer's journey. It focuses marketing and communication efforts on listening to the needs of prospects and providing the information and answers they need.

- On average, 80% of the leads in any system are not yet ready to buy on the first visit nor take a free trial.
- Almost 80% of new leads never become sales (MarketingSherpa).
- Companies that excel at lead nurturing generate 50% more sales ready leads at a 33% lower cost (Marketo).
- Nurtured leads make 47% larger purchases than non-nurtured leads (The Annuitas Group).

Effectively developing leads in today's buyer-driven marketplace means establishing and nurturing buyer relationships with a strategic lead scoring system, and then filling out that framework with a thorough content marketing plan.

Here is an example of a typical lead nurturing program:

1) Entice the targeted buyer persona to download a high valued piece of content that addresses their pain point, interests, or concerns in exchange for their contact information.

2) Establish a lead scoring system that ensures the right nurturing information is delivered to the targeted persona and that the lead is passed off to the sales department at the optimized time.

Property Requirements	Score	Notes	HS	Definitions
Number of Pageviews (1-2)	25			Leads - Contacts in the HubSpot database that have converted on a form one or more times
Number of Visits (1-2)	25			MQL - Any HubSpot score 400+ that is not an SQL, Opportunity or Customer
Emails Opened (2+)	25			SQL - Any person who fills out a Demo or Get Started form.
Emails Clicked (2+)	25			Opportunity - Any contact associated with an opportunity in Salesforce
Completed Hiring of X Case Study Form	50	Company's name and corresponding page redacted	x	Customer - Any contact associated with a Closed Won opportunities in Salesforce
Completed Hiring for the C-Suite Case Study Form	50	Company's name and corresponding page redacted	x	
Completed X Case Study Form	50	Company's name and corresponding page redacted	x	Color Key
Visited Engagement Page	50	Contains URL: Redacted	x	Engagement
Visited Profile Page	50	Contains URL: Redacted	x	Behavior
Visited Blog	50	Contains URL: Redacted	x	Persona/Demographic
Completed X Form	50	Redacted	x	BOFU Offers
Title	75	Owner, HR, Human, CEO, Partner, Director, VP, Vice, Pres	x	
Industry	75	Fortune 500 list, Technology, Manufacturing, Industrial, Education, Fitness, Food/Hospitality, Healt	x	
Actively Looking to Fill Postion (3-6 months)	75		x	
Number of Employees (500+)	75	CHECK FIELD	x	
Over 50 million dollars in annual sales	50	*NEW FIELD*	x	
Personal Email	-400	@hotmail @gmail @live @yahoo @ymail @googlemail @me @aol	x	
Unqualified Status	-1000		x	
Bottom of the Funnel Conversion (ANY)	500	Also Moves to SQL	x	
Request a Consultation (ANY)	1000	Also Moves to SQL	x	

3) Create an email that will nurture each unique buyer persona at each stage of the buyer's journey

	Buyer Persona #1	Buyer Persona #2	Buyer Persona #3
Top of the Funnel	X	X	X
Middle of the Funnel	X	X	X
Bottom of the Funnel	X	X	X
Sales Enablement	X	X	X
Customer	X	X	X

4) Typical nurturing campaign has 7-8 emails that must provide new and valuable information to the subscriber. A typical format always presents new information or information in an original format. The emails are spaced out 3-5 weekdays (not including holidays and AWAYS provides an opportunity for free trial or to sign up for the full paid version.

1st Email	Thank you for downloading eBook with share feature
2nd Email	Infographic summarizing the eBook
3rd Email	4-8-page Guide offering additional insights
4th Email	Invite to Webinar
5th Email	Video of what the Experts are Saying
6th Email	Comparison and Advantages
7th Email	Case Study/Success Story

Technology Overview

Company	URL	Analytics & Tracking	Marketing Automation	Widgets	Content Management System	Advertising	Video
HealthBiller	HealthBiller.com	Google Analytics	None	Wix	Wix	LinkedIn Ads DoubleClick	None
ClinicSource	clinicsource.com	Pardot Google Analytics	Pardot	Hotjar	WordPress	DoubleClick	YouTube
Foothold	footholdtechnology.com	N/A	N/A	N/A	N/A	N/A	N/A
Kareo	Kareo.com	Eloqua Google Analytics	Eloqua	Hotjar Live Person	Atlassian	DoubleClick	YouTube Zoom. Wistia
Luminello	Luminello.com	N/A	N/A	N/A	N/A	N/A	N/A
Procentive (Therapy Brands)	Procentive.com	HubSpot Google Analytics	HubSpot	HubSpot Messages	WordPress WooCommerce	LinkedIn Ads DoubleClick	None
SimplePractice	Simplepractice.com	Google Analytics	N/A	CrazyEgg	N/A	DoubleClick	Wistia
Therapy Appointment	therapyappointment.com	HubSpot Google Analytics	HubSpot	HubSpot Messages	HubSpot	DoubleClick	YouTube
TheraNest (Therapy Brands)	TheraNest.com	HubSpot Google Analytics	HubSpot	HubSpot Messages	WordPress	DoubleClick	Wistia
TherapyNotes	Therapynotes.com	HubSpot Google Analytics	HubSpot	HubSpot Messages	HubSpot	DoubleClick	N/A
Valant EHR Suite	Valant.io	Marketo Google Analytics	Marketo	N/A	WordPress	DoubleClick	Vimeo
Therapy Brands	therapybrands.com	HubSpot Google Analytics	HubSpot	HubSpot Messages	WordPress	DoubleClick	Vimeo

The reason we look at the technology stack of each competitor is to identify areas that may be contributing to marketing/sales success.

The three areas that are noteworthy are in the Analytics/Tracking, Marketing Automation, and Advertising sections.

HealthBiller need to improve everything (website, content, social, backlinks, etc.) then begin to add to its analytic/tracking stack with heat map and social tracking tools.

According to Builtwith, HealthBiller does not appear to be using marketing automation software.

Feature Analysis

Company	Behavioral Health Focus	EMR/EHR	Patient Billing	Insurance Billing	Compliance Tracking	Self Service Portal	Employee Management
HealthBiller	X	Yes	Yes	Yes	X	X	X
ClinicSource	Dedicated	Yes	Yes	Yes	Yes	Yes	No
Foothold	Featured	Yes	Yes	Yes	Yes	Yes	Yes
Kareo	Featured	Yes	Yes	Yes	Yes	Yes	No
Luminello	Dedicated	Yes	Yes	Yes	Yes	Yes	No
Procentive (Therapy Brands)	Dedicated	Yes	Yes	Yes	Yes	Yes	Yes
SimplePractice	Featured	Yes	Yes	Yes	Yes	Yes	Yes
Therapy Appointment	Dedicated	Yes	Yes	Yes			
TheraNest (Therapy Brands)	Dedicated	No	Yes	Yes	Yes	Yes	
TherapyNotes	Dedicated	Yes	No	Yes	Yes	Yes	Yes
Valant EHR Suite	Dedicated	Yes	Yes	Yes	Yes	Yes	Yes
Therapy Brands	Dedicated	Yes	Yes	Yes	Yes	Yes	Yes

Company	Appointment Scheduling	Self Scheduling	Multi-Provider Scheduling	Confirmation Reminders	HIPAA Secure SMS	Practice Management	Notes
HealthBiller	Yes	Yes	Yes	Yes	Yes	Yes	Yes
ClinicSource	Yes	Unknown - Need Demo	Unknown - Need Demo	Yes	Yes	Yes	Yes
Foothold	Yes	No	Unknown - Need Demo	Yes	No	Yes	Yes
Kareo	Yes	Unknown - Need Demo	Unknown - Need Demo	Yes	Yes	Yes	Yes
Luminello	Yes	Unknown - Need Demo	Unknown - Need Demo	Yes	Yes	Yes	Yes
Procentive (Therapy Brands)	Yes	Yes	Unknown - Need Demo	Yes	Yes	Yes	Yes
SimplePractice	Yes	Yes	Unknown - Need Demo	Yes	Yes	Yes	Yes
Therapy Appointment		Yes	Unknown - Need Demo		Yes	Yes	Yes
TheraNest (Therapy Brands)	Yes	Unknown - Need Demo	Unknown - Need Demo	Yes	Yes	Yes	Yes
TherapyNotes	Yes	Unknown - Need Demo	Unknown - Need Demo	Yes	No	Yes	Yes
Valant EHR Suite	Yes	Unknown - Need Demo	Unknown - Need Demo	Yes	Yes	Yes	Yes
Therapy Brands	Yes	Unknown - Need Demo	Unknown - Need Demo	Yes	Yes	Yes	Yes

Company	Treatment Planning	Telehealth	ePrescribing	Mapping	Free Trial	Professional Website Offer	Pricing
HealthBiller	X	Yes	Yes	Yes	Yes	No	Full Suite $129/month/provider
ClinicSource	Yes	Yes	No	No	No	No	$72.95/month/1st provider $36.95/month/2nd+ provider
Foothold	No	No	Yes	No	No	No	$2,000/month
Kareo	Yes	Yes	Yes	No	Yes	No	Full Suite $224/month/provider
Luminello	Yes	Yes	Yes	No	Yes	No	Full Suite $199/month/provider Plus code us $1/55/month Insurance Claims $0.39/claim. SMS Appointment Reminders $4.99/month
Procentive (Therapy Brands)	Yes	No	Yes	No	unknown	No	Unknown - Need Demo
SimplePractice	Yes	Yes	No	No	Yes	Yes	$99/month/provider
Therapy Appointment		Yes	Unknown - Need Demo	No	Yes	No	Full Suite $75/month/provider plus $0.17 per insurance claim
TheraNest (Therapy Brands)		No	Yes	No	Yes	No	$91/month/provider
TherapyNotes	Yes	Yes	No	No	Yes	No	$124/month/provider plus 14 cents per SMS text and 14cnts per insurance claim
Valant EHR Suite	Yes	Yes	No	No	Yes	No	Unknown - Need Demo
Therapy Brands	Yes	Yes	Yes	No	Yes	No	

Reporting

NOTE: The accumulation and reporting of metrics at HealthBiller is not ascertainable until access is given to their program. At such time an in-depth analysis should be made. The following is a summary of the need and some methodology that should be engaged.

If you are guessing on any aspect of digital marketing, you are doing it wrong. Before you engage in any activity you should have foundational knowledge that suggest the need for the activity. This does not mean that you are not extremely creative or take initiative to try innovative approaches. This means you know you need help in growing the areas they are seeking to address.

Part of any vibrant marketing program is the identification and tracking of Key Performance Indicators (KPIs). This reporting consists of 400 plus KPIs and the process can be automated so the time spent is in the analysis not with hours of accumulating the data. These KPIs are precursors to what is the true measure of marketing/sales success. Substantial (double-digit percentage) increases in Customers, Revenue, Profitability, and Influencers/Advocates.

This reporting is should be available in two formats:

Comprehensive Scorecard:

A comprehensive scorecard provides complete transparency and has month by month (color-coded) reporting of all 400+ KPIs. A snippet of on page (out of 25) might contain the following:

Marketing Scorecard 2020 - SUMMARY					
Sales Pipeline	**October**	**Nov**	**Dec**	**Average**	**Pipeline**
Leads					
MQLs					
SQLs					
Free Trials					
Customers					
Renewals					
Lead Velocity					
SaaS Metrics	**October**	**Nov**	**Dec**	**Average**	**Pipeline**
Lifetime Value					
Customer Acquisition Cost					
Average Revenue/Account					
Net Monthly Recurring Revenue					
Net Churn Rate					
Gross Churn Rate					

Source	October	Nov	Dec	Average	Pipeline
Organic					
Google					
Bing					
Yahoo					
Direct					
Referral Site					
Influencer					
Social					
Facebook					
Twitter					
LinkedIn					
Instagram					
PPC					
Co-Branded					
Lookalike					
Retargeting					

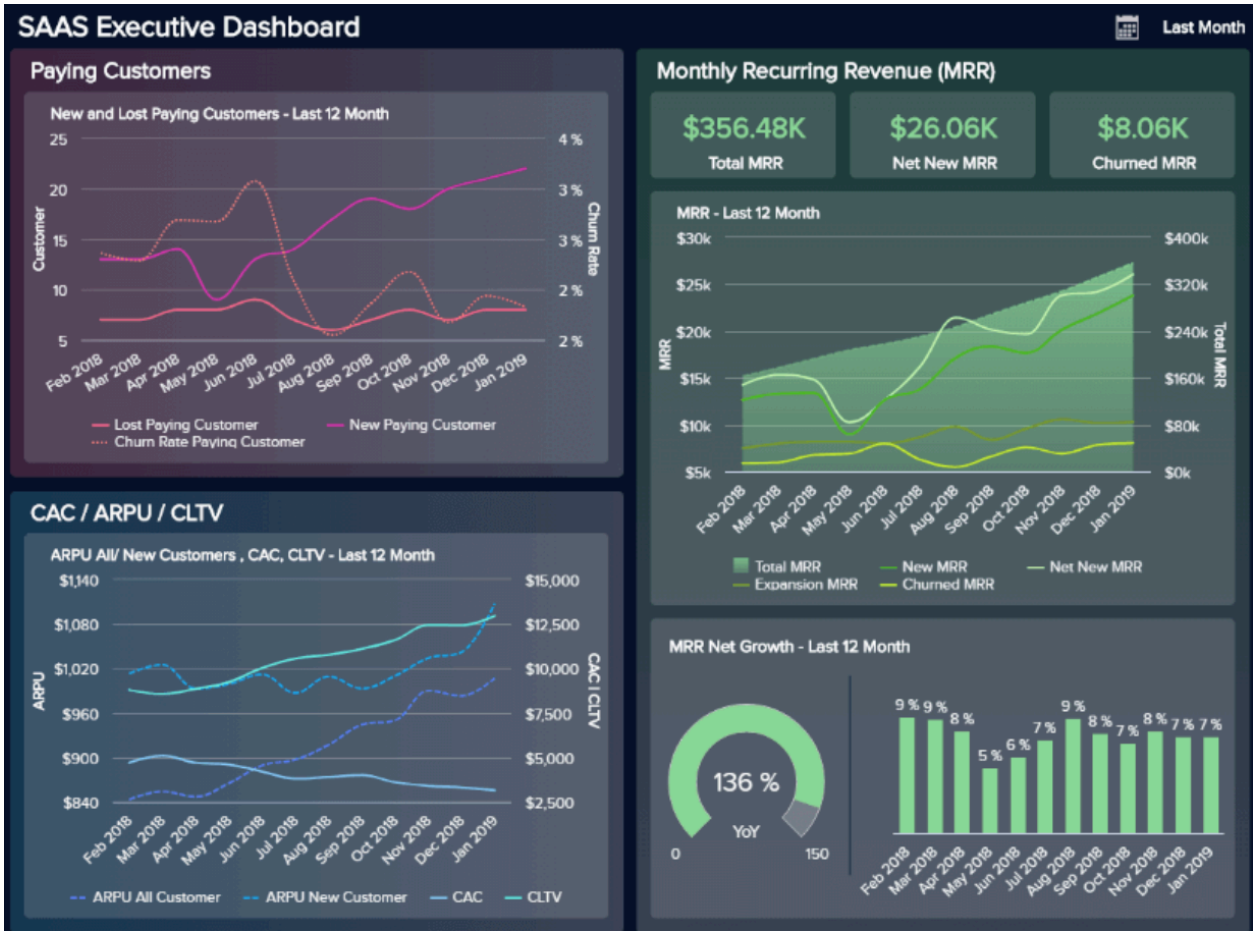
Typically, the KPI fall into the following categories:

- **Output KPIs:** Number of blog posts, downloads and videos. Keeping track of that quantity and regularity of what we publish. We can do that by having a well-planned out editorial schedule and ensuring we have the skills, either

internally or externally, for creating that content (Journalists, graphic designers, copywriters, etc.).

- **Interactive KPIs:** Measuring how well the content is performing. If we're putting it out there, are people absorbing it, liking it or sharing it? Are we getting the social proof we need from the search engines?
- **Success KPIs:** Leads generated and progression through each stage of the buyers' journey, Lifetime Value of a customer (LTV), Customer Acquisition Cost (CAC), Churn, ARPA (Average Revenue per Account per month), Committed Monthly Recurring Revenue (CMRR).
- **Conversion KPIs:** Is that landing page, email, CTA, ad, etc. converting at 30 percent? What are we doing to improve that so we can convert at 35 percent next month?

Executive Summary: Very few top executives want to wade through endless analytics each month. They do need to keep informed and want that process to be a simple as possible. We found the best practices to either present the key data in a PowerPoint presentation or utilize a visual dashboard such as shown below. Some of this information would already be present in HEALTHBILLER dashboard but other marketing indicators would not.



Sales Enablement

It's no longer enough for marketing to just generate leads and nurture them to a free trial. We strongly believe it is our role to help HEALTHBILLER acquire new clients and eventually turn those clients into Brand advocates and influencers

The following illustrates the full marketing/sales funnel:



Recommendations:

A more detailed analysis of the Sales Process needs to be conducted before any actionable programs can be developed. However, here are two areas that need to be considered.

Sales Enablement:

Sales enablement is the process of providing the sales organization with the information, content, and tools that help salespeople sell more effectively. The foundation of sales enablement is to provide salespeople with what they need to successfully engage the buyer throughout the buying process.

Sales Enablement encompasses the new normal that must exist between marketing and sales. It involves a seamless process that has sales involved at the earliest stages and marketing becomes the architect of helping to help sales close deals and move customers to advocates.

This is accomplished in a variety of ways.

- ❖ Marketing needs to ensure that Sales has the right buyer persona targeted resources that will resonate both in media type and messaging. The knowledge learned during the lead generation process will allow insights to developing personalized information and delivering it at the right time.
- ❖ Sales Enablement means tracking the results and learning from Sales which leads proved to become the best clients so that Marketing can strive to deliver more highly qualified leads.
- ❖ Sales Enablement means providing Sales with actionable intelligence about the person taking the trial and helping to ensure that the right information gets delivered.

Customer Success:

To be successful, ever company needs to generate highly targeted quality leads for sales. However, no SaaS company can maintain their success unless they eliminate churn.

In fact, customer success is on par with marketing and sales as a growth driver. With buying habits shifting, and software companies adopting a subscription-based pricing model, building relationships and trust with customers has become a necessity.

Some of the areas that Marketing can assist Sales to reduce churn are as follows.

- ❖ Creation of unique “client only” content and events that will help keep customers tied to HealthBiller. This can include monthly customer only email marketing campaigns informing them of news, articles, and other valuable information; client focused blog programs and client-only webinars where 3rd-party influencers share the stage with HealthBiller

- ❖ Creation and management of a Net Promoter Score Program. This is one of the most common customer experience metrics used by companies around the world. With NPS you can:

    - Segment customers by loyalty
    - Identify unsatisfied and at-risk customers
    - Optimize around a single customer metric
    - Benchmark against industry and competitor scores
    - Uncover customer loyalty drivers
    - Monitor improvements in products, services and across the entire customer journey

When entering a business relationship with any individual, it is important to understand their philosophy and how they will engage the business. Here are several bullet points that outline some of the marketing/sales tenets that I believe are important to success.

- The only thing constant in marketing is change. It is a field that is constantly evolving and where you must be a student open to new ideas, strategies, and techniques.
- As this report suggests, I am metric-driven. The numbers do not lie and form the foundation for knowing what is working and what needs to be scrapped, improved, or made a higher priority.
- Marketing is not one single initiative or activity. You must have a fully integrated cross-channel marketing approach that includes content marketing, inbound marketing, outbound marketing, influencer marketing, earned media, public relations, social media, paid advertisement, account-based marketing, etc.
- Marketing is first making sure the fundamentals are locked in, then A/B testing everything to find continuous improvements. You must engage the prospect at each stage of the buyer's journey.
- For every piece of content or campaign, you must be able to answer which buyer persona it is for and at which stage of the buyer's journey you are targeting. You must also be able to articulate what you believe will be the impact of that initiative.
- In many ways marketing aligns itself well to a baseball analogy. It involves a team of individuals who have specialized training and talents. To win, everyone must communicate and work together toward a common goal. The manager's job is to listen, learn, and teach the team the best strategies, practices, and their applications. While everyone loves to see the walk off grand slam homerun that wins the game, most victories are about doing the fundamentals correctly and putting together a series of singles and doubles that provide the victory.

  In Marketing, it takes a team of specially trained individuals who understand the fundamentals well enough that they can A/B test and apply new techniques and strategies. While we will have campaigns or initiatives that hit the ball out of the park and drives tens of thousands of leads in each month, success usually comes from doing the fundamentals correctly and taking actions that by themselves represent incremental improvements that combined create tens of thousands of additional leads each month.

- Marketing has evolved to become a partnership with the Sales Department equally responsible for sales, client upsells, client retention, and helping to convert happy customers to brand advocates.
- The head of the Marketing Department is responsible for the success of the team, program, and results. He/She must listen and be open to ideas but is ultimately responsible for teaching the team best practices. It is not the role of the leader to micro-manage but it is his/her role to properly train and then hold members accountable for the execution.
- While I track hundreds of KPIs each month their improved performance should

only be viewed as a precursor to success. Success only is defined as substantial (double-digit percentage) increases in ALL of the following:

- Customers
- Revenue
- Profitability
- Influencers and Advocates.

Financial Plan

Putting together a financial plan necessitates making a number of assumptions about the product development, resources, and staffing of any organization. While any such financial planning is wrought with uncertainty, we have tried to mitigate that risk by taking the most conservative approach with respect to:

- Product Development
- Competitive Marketplace
- Product Pricing
- Staffing
- Marketing Budget
- Critical Mass
- Revenue Projection

Financial Plan Assumptions

Product Development:

HealthBiller currently has three developers on staff and part time access to the original product architect (Doug Lyman). In addition, the company if acquired will have a number of seasoned professionals who have spent decades in this particular industry sector who can provide insights into the necessary product features to ensure can present a competitive product.

Assumption #1 – There will be a well-structured product advisory that is able to ascertain what features and UX/UI is absolutely required to go to market versus what is aspirational and can be developed over time.

Assumption #2 – The current Ukrainian development team will remain with the company for the foreseeable future to allow continuity of operations.

Assumption #3 – Doug Lyman will continue in a part-time role (5-10 hours/week) to advise and help orchestrate the necessary changes.

Assumption #4 – Murray Radzanower will head up the product team to advise as to feature development.

Assumption #5 – HealthBiller will be able to bring to market in three months a minimum viable product (MVP) that can compete in the marketplace.

Competitive Marketplace:

While an analysis has been made and share in this document, it is essential that every major competitor investigated in depth for their features, sales process, customer support, pricing model and product roadmap. This will require direct interaction with each company to obtain a product demo which will in turn showcase their sales process, pricing and to some extend their product roadmap

In order to be obtain market share in the shortest amount of time it is critical that HealthBiller specialize and differentiate itself to a specific sector in the healthcare marketplace.

Assumption #6 – An individual (Bill Arnold) arranges through a dummy company a demo and free trial of each competitor specifically to ascertain their features, sales process, customer support, pricing model and product roadmap.

Assumption #7 - HealthBiller be rebranded and marketed as full featured Behavioral Health EHR and Practice Management Platform.

Product Pricing:

HealthBiller seems competitively priced as a mid-range alternative to many of their major competitors. However, the exact pricing model should be re-evaluated after the complete competitive review recommended in assumption #6. Strong consideration should be made to adopting a pricing model based on actual usage by the client practice as opposed to a one price fits all model.

Medical Practices may differ significantly in the number of patients their practitioner sees any given month. Adopting a usage model allows HealthBiller to be seen as a partner in growth as opposed to a top line expense. HealthBiller makes money when the Practice makes money.

Assumption #8 – HealthBiller will review their pricing model once a complete competitive marketplace reviews as anticipated in assumption #6.

Staffing:

For any early-stage company, it is essential that they do more than less. Employee staffing needs to employ individuals who can undertake a number of essential roles until such time that revenues justify hiring staff who can specialize and improve performance in a particular role.

There is always a great desire to bring the best talent onboard as quickly as possible, but this practice often causes an early-stage company to run out of money before they hit critical mass.

Assumption #9 – Founders all have current jobs (mostly owners of other companies) and will contribute free advice and support to protect their equity position in the company.

Assumption #10 – Any highly specialized roles will be kept to a minimum as either be a 5-10 hour/week parttime position or be compensated through equity.

Assumption #11 – The initial roles that will be the compensated initial startup team are:

Engineering – 3 Ukrainian Developers (fulltime positions)
Product Advisor (Doug Lyman) – (parttime position 5-10 hours)
Marketing/Sale/Support role – fulltime position
Executive in Charge – This can be combined with the Marketing/Sales/Support role or be one of the Founders who engages due to his/her equity position.

Assumption #12 – Marketing budget has been created that allows intermittent support when/if needed

Assumption #13 – Any additional fulltime staff will only be hired when justified by the revenue stream or when HealthBiller reaches critical mass.

Marketing Budget:

This report identified a number of issues and inefficiencies that HealthBiller will need to overcome to allow it to reach critical mass. There needs to be a new website that is both SEO friendly and built according to best practices. Copious amounts of content need to be created and posted on the website or distributed across the internet to garner quality backlinks and leads. Each section of the marketing analysis made findings and recommendation that need to be implemented if HealthBiller is to succeed.

Most of these elements can be done in-house but several items may require outside support or procurement of software (e.g., HubSpot). All the financial calculations regarding the marketing budget have these elements built into the numbers provided. The range between the minimum viable and fast growth cost is simply recognition that there is a direct correlation between what resources are available and how quickly results can be obtained. Depending on the budget available, it may take 4 to 6 months to complete each of these elements and start seeing significant increases in customers and revenue.

Marketing performance need to be measured and adjusted based on performance results. Typically, hundreds of key performance indicators (KPIs) are tracked on a monthly basis. KPIs can help you modify and enhance any marketing effort to enhance performance and can provide a reasonable understanding of what the lead and sales results will be in the subsequent quarter. KPIs are simply a barometer of success and NEVER marketing/sales success which is always double digit increases in:

- Customers

- Revenue
- Profitability
- Annual Recurring Revenue

All marketing efforts will be driven by this initial report until we start getting performance data or additional information derived from the enhance competitive analysis (assumption 6).

Assumption #14 – The HealthBiller Analysis will be the foundation of a comprehensive marketing plan that will outline for the next 6 months specific elements of the plan, timetable for completion, and anticipated results.

Assumption #15 – A monthly scorecard will be developed with all the key performance indicators (KPIs) that will be tracked and shared to the founders each month.

Assumption #16 – All outside marketing support or software tools must live within the budget provided.

Critical Mass:

Critical mass is that point where a company's revenues equal or exceed their monthly expenditures and they no longer are using their reserves (e.g., Profitability). The financial plan has been segmented into three scenarios based on available capital to operate the business until critical mass is reached.

Based on the operating budget provided, it will take between 230 to 360 licenses (based on current pricing) to reach critical mass.

Assumption #17 – Current Pricing will remain in effect during this period

Assumption #18 – Operating Budget will not exceed what is set forth in the financial Plan

Assumptions capsulized in a chart:

Cost Sector	Steady Growth		Enhanced Growth		Expedited Growth
Engineering Team	$8,500		$8,500		$8,500
Marketing Initatives	$7,500		$15,000		$20,000
Software	$250		$375		$700
Doug Lyman	$2,500		$4,166		$6,300
Staff MKT/SALES/SUPPORT	16,667		16,667		16,667
Backup	2,500		2,500		2,500
MISC	2,000		2,000		2,000
MONTHLY COST	**$39,917**		**$49,208**		**$56,667**
CRITICAL MASS					
Cost Sector	**SLOW GROWTH**		**Steady Growth**		**Fast Growth**
NUMBER OF LICENSES	**230**		**290**		**360**
CURRENT LICENSES	20 (10K)		20 (10K)		20 (10K)
NET NEEDED	210		270		340
NEW CLIENTS PER MONTH	10		15		20
CRITICAL MASS (MONTHS)	21		18		17
21 MONTHS/10 MONTH	$267,359	18 MONTHS/15 MONTH	$326,621	18 MONTHS/20 MONTH	$ 354,512
23 MONTHS/9 MONTH	$308,315	21 MONTHS/13 MONTH	$380,390	20 MONTHS/17 MONTH	$ 421,210
30 MONTHS/7 MONTH	$400,215	25 MONTHS/11 MONTH	$454,522	24 MONTHS/14 MONTH	$ 516,288
42 MONTHS/ 5 MONTH	$565,719	35 MONTHS/8 MONTH	$631,820	34 MONTHS/10 MONTH	$ 731,408

Financial Plan

MONTH	CLIENTS	REVENUE	STEADY	CRITICAL MASS	MONTH	CLIENTS	REVENUE	ENHANCED	CRITICAL MASS	MONTH	CLIENTS	REVENUE	EXPEDITED	CRITICAL MASS
JAN	30	$ 13,870.00	$ 26,047.00		JAN	35	$ 14,515.00	$ 34,693.00		JAN	40	$ 15,160.00	$ 41,507.00	
FEB	40	$ 15,160.00	$ 24,757.00		FEB	50	$ 16,450.00	$ 32,758.00		FEB	60	$ 17,740.00	$ 38,927.00	
MAR	50	$ 16,450.00	$ 23,467.00		MAR	65	$ 18,385.00	$ 30,823.00		MAR	80	$ 20,320.00	$ 36,347.00	
APR	60	$ 17,740.00	$ 22,177.00		APR	80	$ 20,320.00	$ 28,888.00		APR	100	$ 22,900.00	$ 33,767.00	
MAY	70	$ 19,030.00	$ 20,887.00		MAY	95	$ 22,255.00	$ 26,953.00		MAY	120	$ 25,480.00	$ 31,187.00	
JUN	80	$ 20,320.00	$ 19,597.00		JUN	110	$ 24,190.00	$ 25,018.00		JUN	140	$ 28,060.00	$ 28,607.00	
JUL	90	$ 21,610.00	$ 18,307.00		JUL	125	$ 26,125.00	$ 23,083.00		JUL	160	$ 30,640.00	$ 26,027.00	
AUG	100	$ 22,900.00	$ 17,017.00		AUG	140	$ 28,060.00	$ 21,148.00		AUG	180	$ 33,220.00	$ 23,447.00	
SEP	110	$ 24,190.00	$ 15,727.00		SEP	155	$ 29,995.00	$ 19,213.00		SEP	200	$ 35,800.00	$ 20,867.00	
OCT	120	$ 25,480.00	$ 14,437.00		OCT	170	$ 31,930.00	$ 17,278.00		OCT	220	$ 38,380.00	$ 18,287.00	
NOV	130	$ 26,770.00	$ 13,147.00		NOV	185	$ 33,865.00	$ 15,343.00		NOV	240	$ 40,960.00	$ 15,707.00	
DEC	140	$ 28,060.00	$ 11,857.00		DEC	200	$ 35,800.00	$ 13,408.00		DEC	260	$ 43,540.00	$ 13,127.00	
JAN	150	$ 29,350.00	$ 10,567.00		JAN	215	$ 37,735.00	$ 11,473.00		JAN	280	$ 46,120.00	$ 10,547.00	
FEB	160	$ 30,640.00	$ 9,277.00		FEB	230	$ 39,670.00	$ 9,538.00		FEB	300	$ 48,700.00	$ 7,967.00	
MAR	170	$ 31,930.00	$ 7,987.00		MAR	245	$ 41,605.00	$ 7,603.00		MAR	320	$ 51,280.00	$ 5,387.00	
APR	180	$ 33,220.00	$ 6,697.00		APR	260	$ 43,540.00	$ 5,668.00		APR	340	$ 53,860.00	$ 2,807.00	
MAY	190	$ 34,510.00	$ 5,407.00		MAY	275	$ 45,475.00	$ 3,733.00		MAY	360	$ 56,440.00	$ 227.00	17 MONTHS
JUN	200	$ 35,800.00	$ 4,117.00		JUN	290	$ 47,410.00	$ 1,798.00	18 MONTHS	JUN	380	$ 59,020.00	$ (2,353.00)	
JUL	210	$ 37,090.00	$ 2,827.00		JUL	305	$ 49,345.00	$ (137.00)		JUL	400	$ 61,600.00	$ (4,933.00)	
AUG	220	$ 38,380.00	$ 1,537.00		AUG	320	$ 51,280.00	$ (2,072.00)		AUG	420	$ 64,180.00	$ (7,513.00)	
SEP	230	$ 39,670.00	$ 247.00	21 MONTHS	SEP	335	$ 53,215.00	$ (4,007.00)		SEP	440	$ 66,760.00	$ (10,093.00)	
OCT	240	$ 40,960.00	$ (1,043.00)		OCT	350	$ 55,150.00	$ (5,942.00)		OCT	460	$ 69,340.00	$ (12,673.00)	
NOV	250	$ 42,250.00	$ (2,333.00)		NOV	365	$ 57,085.00	$ (7,877.00)		NOV	480	$ 71,920.00	$ (15,253.00)	
DEC	260	$ 43,540.00	$ (3,623.00)		DEC	380	$ 59,020.00	$ (9,812.00)		DEC	500	$ 74,500.00	$ (17,833.00)	
JAN	270	$ 44,830.00	$ (4,913.00)		JAN	395	$ 60,955.00	$ (11,747.00)		JAN	520	$ 77,080.00	$ (20,413.00)	
FEB	280	$ 46,120.00	$ (6,203.00)		FEB	410	$ 62,890.00	$ (13,682.00)		FEB	540	$ 79,660.00	$ (22,993.00)	
			$ 267,359					$ 326,621.00					$ 354,512.00	
ACQUISTION COST			$400,000					$450,000					$500,000	
	21 Months	PROJECTED	$ 667,359			18 Months	PROJECTED	$ 776,621			17 Months	PROJECTED	$ 854,512	
	23 Months	15% (9)	$ 708,315			21 Months	15%	$ 830,390			20 Months	15%	$ 1,275,722	
	30 Months	30% (7)	$ 800,215			25 Months	30%	$ 123,143			24 Months	30%	$ 1,792,010	
	42 Months	50% (5)	$ 965,719			35 Months	50%	$ 1,462,210			34 Months	50%	$ 2,523,418	

The financial plan sets forth what is a reasonable expectation of results if the product, marketing, and sales plan is implemented as set forth herein.

Reasonable Expectation

The operating budgets that have been established are all inclusive expenditures for the operation and marketing of HealthBiller over the course of the next couple of years. We established three grow models Steady, Enhanced, and Expedited based on available starting capital.

Based on the competitive marketplace, past performance, and if assumptions 1 – 18 hold true, it is reasonable to expect the following results (acquisition costs removed):

Steady Growth		Enhanced Growth		Expedited Growth	
Months	**Operating Cost**	**Months**	**Operating Cost**	**Months**	**Operating Cost**
21	$267,359	18	$326,621	17	$354,512

As anyone who ever operated a business knows, most things do not go as planned and to ensure the viability of the company you need to anticipate for things that go off the rail and disrupt your anticipated growth model.

Risk Factored Expectations

The chart about shows for each growth model scenarios where factors disrupt the growth by 15%, 30%, and 50%. The following chart shows what can be expected if the anticipated growth is off by 50% (acquisition costs removed):

Steady Growth		Enhanced Growth		Expedited Growth	
Months	**Operating Cost**	**Months**	**Operating Cost**	**Months**	**Operating Cost**
42	$565,719	35	$1,012,250	34	$2,023,418

Capitalization Recommendations

It is always better to plan for the worst-case scenario and not need it than to be overly optimistic and find you ran out of runway before you hit critical mass. The reasons most startups fail is not because the business model was bad but because they ran out of money (followed by poor marketing and lack of research).

We recommend that if the partners decide to invest into HealthBiller that they begin with sufficient capital and a long-term outlook for profitability. That means an initial investment not including acquisition costs ($400k - $500K) of two million one hundred thousand dollars ($2,100,00.00) and a thirty-four (34) month period to reach critical mass.

Do we believe it will actually cost this much and take that long to reach profitability? No, but it is always best to under promise and over deliver.