

VitaPonte Partner Launch Toolkit

Agency sales materials and operating templates

Prepared for Krino Salem | October 12 2026

Use these editable templates to recruit and qualify founding agencies, agree pilot terms, onboard staff and decide whether to expand. Commercial amounts are proposed negotiating terms. Legal documents require finalization before signing.

Start here

Choose one pilot state. List 100 verified agency companies in the workbook. Conduct owner interviews. Demonstrate the full care workflow. Select three pilot agencies and agree their post pilot price. Complete the product and contract gates before introducing live visits.

Included templates

1 Agency overview | 2 Discovery questionnaire | 3 Pilot proposal | 4 Commercial term sheet | 5 Onboarding checklist | 6 Demonstration and training | 7 Pilot scorecard | 8 Outreach copy | 9 Legal and security instructions | 10 Pitch narrative

Working files

The accompanying workbook contains a financial model, launch action list and empty agency pipeline. Use the business plan for strategic and financial context. Replace bracketed fields with verified information before sending any template.

01 Agency overview

VitaPonte Partner helps your agency keep families connected, reduce routine office calls and surface care concerns earlier through patient approved next of kin participation. Your logo leads the booking and care experience, with Powered by VitaPonte. You retain customers, caregivers, prices and care responsibility. These benefits are measured during the pilot.

What your agency receives

Customers can request visits and recurring care, review available caregiver profiles and receive visit updates. Caregivers can accept work and record visit progress. Authorized family members can participate with the patient's permission. Your agency can manage schedules, caregiver availability, service rules and operational records from its dashboard.

Ask VitaPonte is included

Ask VitaPonte remains available to every customer, caregiver and authorized family member, with assistance appropriate to each role. Its name stays Ask VitaPonte within your agency's branded experience. Standard AI assistance is included in the agency partnership.

Founding agency pilot

We are proposing a 90 day pilot for three small agencies. The agency pays one setup fee and 5% only on eligible completed and collected care. There is no subscription or minimum monthly platform fee. Normal processing costs remain separate. We review customer retention, office calls and family participation each week.

A clear division of responsibilities

Your agency hires and supervises caregivers, determines services and prices, and handles care issues. VitaPonte provides technology, onboarding and agreed advisory support. Customer data is separated by agency. VitaPonte will not use your customer list to solicit competing care business.

The next step

Schedule a 20 minute discovery conversation followed by a demonstration based on your current scheduling workflow. Contact: [approved contact name and email]. Availability of each capability is confirmed in the signed pilot scope.

02 Discovery questionnaire

Agency name: [] State and service area: [] Owner: []

Contact and preferred follow up method: [] Interview date: []

Business and service scope

How many active caregivers and clients do you have? What licenses and service categories apply?
Response: []

What share of revenue is private pay, Medicaid, Medicare or other payer? Response: []

What are monthly collected care receipts and typical hours per client? Response: []

Current workflow

How do clients book, and who confirms and assigns visits? Response: []

What tools manage availability, recurring schedules, visit records and billing? Response: []

How many hours per week go to scheduling, corrections and family updates? Response: []

Adoption and value

What are the two most costly or frustrating operational problems? Response: []

Which scheduler and caregiver can lead the pilot? How many clients can join initially? Response: []

What measurable result would make the platform worth paying for? Response: []

Commercial and readiness

Would you accept a one time setup fee and 5% of collected payments for completed care for patients onboarded through VitaPonte? Response: []

Are you comfortable with your brand plus Powered by VitaPonte and included Ask VitaPonte?
Response: []

What data, integrations and approvals are required before live use? Response: []

03 Pilot proposal

Prepared for [agency legal name] by VitaPonte Inc. | [date]

Objective: simplify [agency's identified problem] and measure whether the improvement justifies ongoing service. Pilot period: [start date] through [end date], 90 days. Service area: [approved state and local area].

Scope	Agreed value
Initial caregiver and client group	[number and authorized participants]
Services	[approved private pay service categories]
Included workflow	[tested booking, visit, family and dashboard capabilities]
Branding	Agency logo, Powered by VitaPonte and Ask VitaPonte
Pilot charges	\$250 small or \$500 medium setup once; then 5% of eligible care
External expenses	Agency payment processing and specifically agreed extras
Terms after pilot	Same agreed fee structure; any concessions recorded separately
Agency lead and VitaPonte lead	[names and escalation contacts]

Joint work plan

Before launch, confirm the roster, rates, cancellation policy, patient permissions and payment reconciliation. Train the scheduler and caregiver champions and practice two complete visits. Start with a limited group. Review visits, time savings, support effort and customer feedback weekly.

Success and conversion

Agree a baseline and the pilot scorecard. At day 75, review the proposed paid term and measured benefit. At day 90, choose paid conversion, a defined extension or closure. No automatic conversion unless the signed agreement explicitly provides it. Obtain a signed paid order before continuing billable service.

Required before activation

Executed service and data terms, applicable BAA, verified agency licensing and authority, consent workflow, tested software and a go live signoff. This proposal is subject to a final written agreement.

04 Commercial term sheet

Nonbinding discussion document. No obligation to deliver, purchase or pay arises until definitive agreements are signed. Parties: VitaPonte Inc. and [agency legal name].

Item	Proposed term
Offering	Agency branded technology and standard onboarding
Technology charge	5% of collected payments for completed care for platform onboarded patients
Subscription and minimum	None; no recurring minimum or fee cap
Setup	\$250 small or \$500 medium, paid once per agency
Pilot	90 days under agreed terms; no automatic fee waiver
Paid term	Proposed 12 months after explicit signed conversion
Settlement	Agency connected account; configured automatic technology fee
Excluded costs	Processor fees, taxes and separately quoted custom projects
Care responsibility	Agency owns staffing, supervision, credentials and service delivery
Brand and AI	Agency logo; Powered by VitaPonte; Ask VitaPonte always included
Customer information	Agency controls customer relationship; no use for competing solicitation
Exit	Data export, transition support and deletion schedule to be agreed

Resolve before signing

Exclude cancelled visits and define fee adjustments for refunds, patient eligibility, receipt reconciliation, inactive agency treatment, invoice disputes and payment failure. Agree renewal, termination rights, liability, insurance, support hours, permitted data uses and incident notice. Percentage and referral related terms need review for the selected state and payers.

Commercial contact: [] Counsel: [] Proposed signature date: []

05 Onboarding checklist

Stage	Required evidence	Owner
Agency verification	Legal name, license where required, insurance and authorized signatory	Agency owner
Commercial setup	Signed scope, pilot dates, paid pricing and support contacts	VitaPonte lead
Privacy setup	Data terms, applicable BAA and vendor approval	Privacy lead
Branding	Approved logo, service identity and brand usage rights	Agency owner
Roster	Caregiver identity, credentials and availability verified	Agency scheduler
Rates	Services, visit minimums, recurring rules and cancellation terms	Agency owner
Client setup	Correct contact information and service address	Agency scheduler
Family access	Patient grant recorded by permission category	Agency scheduler
Payments	Connected account checks, test receipts and refunds reconciled	Finance lead
Training	Scheduler and caregiver practice two complete visits	Onboarding lead
Security	Tenant tests, role tests and restore drill recorded	Engineering lead
Go live	Agency and VitaPonte signoff with manual fallback	Both leads

Launch signoff record

Agency: [] Build or release version: [] Approved date: []

Open issues and limitations: [] Manual booking and outage procedure: []

Agency approver: [] VitaPonte approver: []

Delay live activation if any required evidence above is absent. Keep patient data out of ordinary support screenshots and spreadsheets unless an approved secure process authorizes it.

06 Demonstration and training

Time	Demonstration step
Minutes 0 to 3	Agency brand, readable navigation and always visible Ask VitaPonte
Minutes 3 to 6	Returning patient edits saved details and selects recurring care
Minutes 6 to 9	Available caregiver list, profile review and optional favorite
Minutes 9 to 12	Agency confirmation and caregiver job acceptance
Minutes 12 to 15	Departure update, arrival, start timer and stop reason
Minutes 15 to 18	Patient approves family access and later revokes it
Minutes 18 to 21	Caregiver confirms summary and family sees permitted information
Minutes 21 to 24	Agency reviews schedule, visit record and fee ledger
Minutes 24 to 27	Cancellation, payment failure and corrected receipt
Minutes 27 to 30	Owner reviews benefit, pilot scope and paid pricing

Training exercise

The scheduler creates a recurring booking and checks availability. The caregiver accepts and completes a visit with a reason for ending it. The patient grants and revokes family access. The family user verifies that access disappears after revocation. The administrator reconciles the care receipt, technology fee and refund.

Ask VitaPonte test

Ask how to book a recurring visit, how to change availability and how to approve a family member. Confirm that answers follow the user's role and the agency's service rules. Try a request for another agency's client record and verify denial. Confirm that general health questions receive appropriate informational guidance and urgent situations route to immediate help.

Honest product demonstration

Identify simulated data and location tracking clearly. Describe unimplemented features as planned. Demonstrate live acceptance, messages, payment results or notifications only when the relevant integration actually works.

07 Pilot scorecard

Agency: [] Review week: [] Baseline period: []

Measure	Baseline	Pilot result	Proposed target
Patient retention	[]	[]	Improve vs baseline
Routine calls per 100 visits	[]	[]	25% reduction target
Family concerns and response time	[]	[]	Track timely action
Visits recorded in platform	[]	[]	80% by week 4
Required visit fields complete	[]	[]	95%
Weekly scheduling and update hours	[]	[]	25% reduction
Additional delivered and collected hours	[]	[]	Track without double counting
Monthly agency benefit	[]	[]	At least 1.5 times fee
Support after onboarding	[]	[]	Under 2 hours per month
Critical unresolved incidents	[]	[]	Zero at conversion
Owner willingness to pay	[]	[]	Signed paid order

Calculate benefit consistently

Administrative benefit = hours demonstrably saved multiplied by the agreed loaded hourly cost.
Added care contribution = incremental delivered and collected hours multiplied by the hourly service rate and contribution margin. Subtract technology fees, incremental processing expenses and ongoing internal effort. Report cash savings separately from time capacity released.

Weekly operating review

Review missed visits, booking conflicts, declined assignments, charge failures, refunds, family permission problems, support tickets and customer feedback. Assign an owner and due date to each issue. Compare results to the same baseline each week.

Pilot outcome

Decision: [convert / extend with conditions / close]. Paid fee accepted: []. Remaining corrective actions: []. Agency approver: []. VitaPonte approver: [].

A successful three agency pilot is evidence for the next cohort, not proof of national demand. Collect testimonial or case study permission separately.

08 Outreach copy

Initial owner email

Subject: Your agency brand with VitaPonte technology

Hello [name],

I am Krimo Salem, founder of VitaPonte. We are developing VitaPonte Partner for small and medium homecare agencies that want easier booking, scheduling and family communication under their own brand.

Your agency keeps its logo, customers and caregivers. The platform displays Powered by VitaPonte, and Ask VitaPonte is included for every customer.

We are seeking three founding agencies for a 90 day pilot. You pay a setup fee once, then 5% only on completed and collected care for patients onboarded through VitaPonte. There is no monthly subscription or minimum fee. The pilot measures retention, routine calls and patient approved family participation.

Would you be available for a 20 minute conversation about how your agency handles bookings and visit updates?

Krimo Salem
Founder and CEO, VitaPonte
[approved email and phone]

Follow up after a demonstration

Subject: Proposed pilot for [agency]

Hello [name],

Thank you for showing us how your team handles [specific workflow]. The proposed pilot would focus on [measurable problem], beginning with [caregiver and client group].

Attached are the pilot scope, success measures and proposed paid terms. Your agency would retain responsibility for care and control of its customer relationships.

Please let me know which scheduler should join the onboarding discussion and what we should adjust in the proposal.

Krimo

Short telephone introduction

We help agencies retain clients and reduce routine calls with a branded care platform and Ask VitaPonte. May we discuss a focused pilot?

09 Legal and security instructions

Brief for legal counsel

Review the agency branded private pay workflow in [state]. Confirm the provider and technology roles based on actual conduct. Review the percentage technology fee, any marketing or referral services, caregiver supervision boundaries, patient consent, privacy law applicability and the payment configuration. Finalize commercial terms, data terms and any applicable BAA before real client data is used.

Document	Required subjects
Master services agreement	Scope, IP, brand rights, care responsibilities, liability and termination
Agency order form	Setup, 5% fee, eligible patients, completion, collection and settlement
Data and security terms	Access, subprocessors, retention, export, incident notice and deletion
Applicable BAA	Permitted PHI use, safeguards, subcontractors and return or destruction
Patient and caregiver notices	Consent, family permissions, AI, location and communication rules
Support policy	Hours, severity levels, escalation and manual fallback

Brief for engineering and security

Produce a data flow diagram and list every vendor that receives customer information. Test agency isolation for records, files, exports and AI search. Verify role permissions and consent revocation. Test booking race conditions, recurring payment retries, refunds, notification delivery and visit record corrections. Run a backup restore and record the result. Confirm that sensitive information does not appear in public logs or notification previews.

Brief for finance

Confirm processor configuration and loss allocation. Reconcile gross care receipts, processor fees, technology fees, refunds and payouts by agency and transaction. Review whether VitaPonte reports net technology revenue under the appropriate accounting treatment. Obtain real vendor quotes and replace workbook cost assumptions before committing expansion funds.

10 Pitch narrative

Use this sequence for an agency meeting or a future presentation. Financial values must remain labeled as scenarios. Do not describe planned functionality as already operating.

1 The customer problem

Small homecare agencies can have established clients and capable caregivers while coordinating work through calls, messages and spreadsheets. Discovery interviews will establish which tasks cause the greatest avoidable effort and missed revenue.

2 The offer

VitaPonte Partner gives an agency its own branded customer and caregiver experience, scheduling tools, visit coordination and Family Connect. Ask VitaPonte is included for every customer. The agency keeps responsibility for care and control of its customer relationships.

3 The commercial relationship

VitaPonte receives \$250 or \$500 in setup once per agency, then 5% of eligible collected payments for completed care. There is no subscription, recurring minimum or cap. Patients onboarded through the platform create a fee only when care is completed and paid.

4 The market and distribution

Broad US agency and establishment counts show a substantial home based services industry but do not count the exact target segment. Begin with 100 verified companies in one state and three pilot partners. Use measured conversion and retention to guide expansion.

5 The economics

At the assumed \$60 hourly rate and full eligible adoption, small and medium examples generate \$6,000 and \$18,000 monthly platform revenue. A 60/40 mix of 1,000 agencies yields a \$129.6 million annual run rate. The 2,038 agency target yields \$264.12 million. These are full adoption scenarios, not promised revenue or profit.

6 The immediate request

For an agency: join a defined 90 day founding pilot with agreed conversion terms. For a funding discussion: finance staged product readiness and pilot execution, using the \$150,000 initial budget and the editable five year funding scenario as a planning input. Funding, agency commitments and results remain to be secured.