

Growth Strategy

Strategic roadmap

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Growth Plan

Version: 1.0 **Last Updated:** 2026-01-28 **Owner:** Alem Basic **Prepared by:** John (Director) + Selma Mustafić (BA) + Amina Hadžić (Head of Projects)

Executive Summary

Clear growth strategy from current state to 12-month vision. Customer acquisition, product development, market expansion, team building, and revenue targets. Actionable, measurable, achievable.

Current State (2026-01-28):

- 0 paying customers (pre-launch)
- MVP 25% complete (Phase 1 & 2 done, Phase 3 RBAC in progress)
- \$10K trading capital
- 1 owner + 1 AI director + 10 virtual agents

12-Month Vision (2027-01-28):

- 50-100 paying customers
 - \$5K-10K MRR (\$60K-120K ARR)
 - Profitable or near break-even
 - 1-2 real humans hired
 - SOC 2 certified, HIPAA compliant
 - Product-market fit validated
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1. Current State Assessment

1.1 What We Have (2026-01-28)

Product:

- LumisCare MVP 25% complete
 - Phase 1: Authentication, basic patient/caregiver management
 - Phase 2: Scheduling, visit management
 - Phase 3: RBAC (in progress)
 - Phase 4: Vapi voice integration, billing, compliance dashboard
- lumiscare.com website live (GitHub Pages, DNS configured)
- snowit.ba website live (no custom domain yet)

Team:

- Alem Basic (owner, strategic)
- John (AI director, operational)
- 10 virtual agents (Amina, Emir, Lejla, Tarik, Nermin, Selma, Dženan, Nick, API Dev, Frontend)
- Asmir Merdžanović (SnowIT partner, Bosnia operations)

Infrastructure:

- GitHub repo (johnatbasicas/vivacareusa)
- AWS account (ready for deployment)
- Vapi voice AI account (+1-762-266-0254)
- Stripe account (payment processing ready)
- john.db (persistence, backup to GitHub)
- Task queue system (john-daemon.sh)

Capital:

- \$10K trading capital (allocated to Nick)
- Operating capital: TBD (Alem to clarify)

Revenue:

- \$0 (pre-launch)

1.2 What We Need

Immediate (Weeks 1-4):

- Complete Phase 3 RBAC
- Build Phase 4 (Vapi, billing, compliance)
- Beta testing program (recruit 20 beta users)
- Cold outreach infrastructure (Apollo, LinkedIn)
- Customer-facing agreements (ToS, Privacy Policy, BAA)

Short-Term (Months 1-3):

- First 10 paying customers
- Deploy to production (AWS)
- SOC 2 prep begins
- Patent provisional filing
- Marketing content (blog, case studies, videos)

Medium-Term (Months 3-6):

- 20-50 customers
- \$2K-5K MRR
- SOC 2 Type II audit
- Hire US sales rep (part-time)
- Expand marketing (ads, partnerships)

Long-Term (Months 6-12):

- 50-100 customers
- \$5K-10K MRR
- Profitable or near break-even
- Consider Series A or continue bootstrapping
- Explore new markets or verticals

2. 3-Month Goals (Feb-Apr 2026)

2.1 Product Development

Goal: Launch LumisCare v1.0 to production with 10 beta customers.

Milestones:

Week	Milestone	Owner
Week 1-2	Complete Phase 3 RBAC	API Dev + Lejla
Week 3-4	Build Vapi voice integration	API Dev + Frontend
Week 5-6	Build billing module (Stripe integration)	API Dev

Week	Milestone	Owner
Week 7-8	Build compliance dashboard (audit logs, HIPAA)	API Dev + Dženan
Week 9	Internal alpha testing (SnowIT team)	Tarik
Week 10-11	Closed beta (10 beta users)	Selma recruits, Tarik QA
Week 12	v1.0 GA launch to production	Nermin deploys

Definition of Done (v1.0):

- All Phase 3 & 4 features complete
- 80%+ test coverage
- HIPAA compliance framework implemented
- Customer-facing agreements (ToS, Privacy, BAA) ready
- Deployed to AWS production
- 10 beta users actively using
- No P1/P2 bugs

Blockers to Resolve:

- Vapi API integration (technical risk — test early)
- HIPAA BAAs with all vendors (Dženan priority)
- AWS production setup (Nermin priority)

2.2 Customer Acquisition

Goal: Recruit 20 beta users, convert 10 to paying customers by Month 3.

Strategy:

Weeks 1-2: Build Prospect List

- Selma builds list of 500 US home care agencies
- Sources: Medicare.gov, state licensing databases, LinkedIn
- Target: FL, TX, CA, NY (largest markets)
- Filter: 50-200 patients, owner-operated

Weeks 3-4: Cold Outreach Campaign

- Write 5-email sequence (Selma)
- Set up Apollo.io + LinkedIn Sales Navigator
- Launch campaign: 500 emails → 50 responses → 15 demos

Weeks 5-8: Beta Recruitment

- Offer: Free for 3 months + "Founding Partner" badge + input on roadmap
- Target: 20 beta users
- Onboarding: Selma + Emir guide through first 5 minutes

Weeks 9-12: Convert to Paid

- Beta users transition to paid after 3 months (or earlier if valuable)
- Target: 10 paying customers by end of Month 3
- Pricing: \$49-99/month (discounted for early customers)

Key Metrics (Month 3):

- 500 emails sent
- 50 demo calls booked (10% response rate)
- 20 beta signups (40% demo-to-trial)
- 10 paid customers (50% trial-to-paid)

2.3 Operations & Compliance

Goal: HIPAA-ready, SOC 2 prep started, infrastructure stable.

Weeks 1-4:

- Draft all HIPAA policies (privacy, security, breach) — Dženan
- Sign BAAs with all vendors (AWS, Vapi, Stripe, Twilio) — Dženan
- Security risk assessment — Dženan + Tarik
- AWS production environment setup — Nermin
- Monitoring & alerting (Datadog, PagerDuty) — Nermin

Weeks 5-8:

- HIPAA training for team — Dženan
- Internal HIPAA audit — Dženan + Tarik
- Purchase cyber liability + E&O insurance — Dženan
- SOC 2 readiness assessment — Dženan

Weeks 9-12:

- Begin SOC 2 Type II audit process (6-month timeline)
- File provisional patent (within 60 days from Jan 28) — Dženan + attorney

Runbooks documented (Nermin)

2.4 Marketing & Content

Goal: Build brand awareness, SEO foundation, content library.

Content Calendar (Weeks 1-12):

Week	Content	Owner
1	Blog: "5 Ways LumisCare Saves Home Care Agencies 10 Hours/Week"	Selma
2	Video: "LumisCare Demo (2 min)"	Emir
3	Blog: "HIPAA Compliance for Home Care Agencies (Checklist)"	Dženan + Selma
4	Case study: "How Agency X Eliminated Paperwork with LumisCare" (using beta data)	Selma
5	Video: "How Vapi Voice Works (60 sec)"	Emir
6	Blog: "Why Voice-to-Assessment is a Game Changer"	Selma
7	LinkedIn: "We just launched LumisCare beta!" (announcement)	Selma
8	Webinar: "Paperwork-Free Home Care Agency" (live demo)	Selma
9	Blog: "Customer Story: [Beta User Name]"	Selma
10	Video: "LumisCare Onboarding (5 min tutorial)"	Emir
11	Blog: "How to Choose Home Care Software (Buyer's Guide)"	Selma
12	PR: Press release "LumisCare Launches with AI Voice Technology"	Selma

SEO Keywords:

- "home care agency software"
- "HIPAA compliant scheduling"
- "caregiver documentation tool"
- "voice-to-assessment home care"
- "EVV software"

Channels:

- Blog (lumiscare.com/blog)
 - LinkedIn (company page + Alem's personal)
 - YouTube (video tutorials)
 - Home care Facebook groups
 - Email (cold outreach + newsletter)
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3. 6-Month Goals (Feb-Jul 2026)

3.1 Product Development

Goal: v1.5 shipped with analytics, mobile app (caregiver), HL7 FHIR integration.

Roadmap:

Month	Features	Status
Month 1-3	v1.0 (core product, Vapi, billing, RBAC)	In progress
Month 4	Analytics dashboard (reports, KPIs)	Planned
Month 5	HL7 FHIR integration (EHR interop)	Planned
Month 6	Mobile app (caregiver, React Native or PWA)	Planned

Key Features:

- **Analytics:** Revenue reports, patient census, caregiver utilization, compliance metrics
- **FHIR:** Export patient data to EHRs (Epic, Cerner, Allscripts)
- **Mobile app:** Caregivers access LumisCare on phone (iOS/Android), clock in/out, document visits

3.2 Customer Acquisition

Goal: 20-50 paying customers, \$2K-5K MRR.

Channels:

Cold Outreach (ongoing):

- 500 emails/month → 50 demos → 15 trials → 5 paid
- Target: 5 new customers/month

Partnerships:

- Home care associations (NAHC, state chapters)
- Home care consultants (referral fees)
- Healthcare compliance consultants

Content & SEO:

- Blog traffic: 1,000 visitors/month by Month 6
- Organic leads: 10/month

Paid Ads (Month 4+):

- Google Ads: "home care software" keywords
- Facebook Ads: Target home care agency owners
- Budget: \$500-1,000/month
- Target: 5-10 leads/month

Customer Success (Retention):

- Onboarding calls (Day 1, 3, 7)
- Monthly check-ins (Selma)
- NPS surveys (quarterly)
- Target churn: <5%/month

Key Metrics (Month 6):

- 20-50 paying customers
- \$2K-5K MRR
- CAC: <\$500
- LTV: >\$2,000
- LTV/CAC: >3:1
- Churn: <5%/month

3.3 Team & Hiring

Goal: Hire 1-2 real humans (US sales rep, customer success).

Month 3-4: Hire US Sales Rep (Part-Time)

- Role: Cold outreach, demo calls, close deals
- Location: US-based (for timezone, local credibility)
- Compensation: Base \$2K/month + 10% commission on new sales
- Target: 10 new customers/month (once ramped up)

Month 5-6: Consider Customer Success Manager

- Role: Onboarding, retention, upsells
- Location: US or remote
- Compensation: \$3K-4K/month
- Target: Reduce churn to <3%, increase LTV

Virtual agents continue (no direct cost yet).

3.4 Operations & Compliance

Goal: SOC 2 Type II certified, HIPAA audit passed, infrastructure scaled.

Month 4:

- SOC 2 Type II audit begins (6-month process)
- HIPAA policies finalized
- Infrastructure scaled to 50 customers (auto-scaling)

Month 5:

- Full utility patent filing (if provisional filed Month 2)
- Vendor BAA review complete
- Incident response drills (test breach notification process)

Month 6:

- SOC 2 Type II audit complete (certification issued)
 - HIPAA internal audit passed
 - Insurance renewed (cyber liability, E&O)
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4. 12-Month Vision (Feb 2026 - Jan 2027)

4.1 Product

v2.0 shipped with:

- AI care plan suggestions (ML model trained on patient data)
- EVV (Electronic Visit Verification) for Medicaid billing
- Family portal (family members view patient care)
- Multi-agency support (manage multiple agencies in one account)
- Advanced analytics (predictive models, churn risk, revenue forecasting)

Platform stability:

- 99.9%+ uptime
- <500ms API latency
- SOC 2 Type II certified
- HIPAA compliant
- Mobile app (iOS + Android)

4.2 Customers

50-100 paying customers

- Mix: 60% Starter (\$49), 30% Professional (\$99), 10% Enterprise (\$199)
- Average: \$80/customer/month
- MRR: \$4,000-8,000
- ARR: \$48,000-96,000

Customer Success:

- Churn: <5%/month
- NPS: >50
- Customer lifetime: >20 months
- LTV: >\$1,600

4.3 Revenue & Profitability

Revenue:

- \$5K-10K MRR (\$60K-120K ARR)
- Trading income: \$3K-6K (if Nick delivers 5% monthly ROI on \$10K)
- Total: \$63K-126K

Expenses:

- Infrastructure: \$24K/year
- SaaS: \$6K/year
- Development (SnowIT): \$60K/year
- Marketing: \$24K/year
- Sales team: \$36K/year (1-2 people)
- Professional services: \$12K/year
- Insurance: \$6K/year
- **Total: ~\$168K/year**

Burn: -\$42K to -\$108K (Year 1 net loss)

Path to Profitability:

- Need ~150 customers × \$80/month = \$12K MRR = \$144K ARR to break even
- Timeline: Month 15-18 (Q1-Q2 2027)

Funding Strategy:

- Bootstrap with Alem's capital + trading profits
- Apply for grants (Google, AWS) — \$100K-\$350K credits
- Consider seed round (\$100K-500K) if growth justifies it

4.4 Team

Real humans hired:

- 1 US Sales Rep (part-time → full-time)
- 1 Customer Success Manager
- Potentially: 1 developer (BiH) to augment virtual agents

Virtual agents continue (10 agents remain core team).

4.5 Market Position

Competitive Advantage:

- Only platform with Vapi voice-to-assessment (game changer)
- 50% charity commitment (brand differentiator)
- Fast, responsive, customer-obsessed
- HIPAA + SOC 2 certified (trust)

Market Share:

- US home care market: 33,000 agencies
- Target: 100 customers = 0.3% market share (Year 1)
- Realistic: 1-3% market share achievable in 3-5 years (300-1,000 customers)

Threats:

- Large EHR vendors (Epic, Cerner) may enter home care
- Microsoft/Nuance building similar AI voice tech (18 months out per patent research)
- Competitors copy voice-to-assessment (patent protects us)

Mitigation:

- File patent ASAP (60-day deadline)
- Move fast, lock in customers

- Build brand and customer loyalty
- Continuously innovate (AI care plans, predictive analytics)

5. Key Milestones & Timeline

5.1 Critical Path (Next 12 Months)

Month	Milestone	Success Metric
Month 1 (Feb)	Phase 3 RBAC complete	Tests pass, ready for Phase 4
Month 2 (Mar)	v1.0 beta launch (10 beta users)	10 beta users actively using
Month 3 (Apr)	10 paying customers	\$500-1,000 MRR
Month 4 (May)	SOC 2 audit begins, hire US sales rep	Audit kickoff, sales rep onboarded
Month 5 (Jun)	20 customers	\$1,500-2,000 MRR
Month 6 (Jul)	30 customers, SOC 2 certified	\$2,500-3,000 MRR, SOC 2 badge
Month 9 (Oct)	50 customers, v1.5 shipped	\$4,000-5,000 MRR
Month 12 (Jan 2027)	100 customers, v2.0 shipped	\$8,000-10,000 MRR, near break-even

5.2 Go/No-Go Decision Points

Month 3 (Apr 2026):

- **Decision:** Continue or pivot?
- **Criteria:**
 - At least 10 paying customers
 - Positive customer feedback (NPS >40)
 - <10% churn
- **If No:** Pivot product, change target market, or shut down

Month 6 (Jul 2026):

- **Decision:** Raise funding or continue bootstrapping?
- **Criteria:**
 - 20-30 customers
 - Strong product-market fit (NPS >50, <5% churn)
 - Clear path to \$10K MRR by Month 12
- **If Yes:** Raise \$100K-500K seed round
- **If No:** Continue bootstrapping, slower growth

Month 12 (Jan 2027):

- **Decision:** Scale aggressively or stay lean?
- **Criteria:**
 - 50-100 customers
 - Profitable or clear path to profitability
 - SOC 2 + HIPAA certified
 - Team can handle 2x growth
- **If Yes:** Raise Series A (\$1M-3M), hire 5-10 people, scale to 500 customers
- **If No:** Stay lean, grow organically, focus on profitability

6. Risk Management (Growth Risks)

Risk	Probability	Impact	Mitigation
Slow customer acquisition	Medium	High	Multiple channels (cold, SEO, paid, partnerships), adjust pricing if needed
High churn (>10%)	Medium	High	Focus on onboarding, customer success, product improvements
Competitor copies voice feature	Medium	Medium	File patent ASAP, continuously innovate, build brand loyalty
HIPAA audit failure	Low	Critical	Work with Dženan, external auditor, pass SOC 2 first
Cash runway runs out	Medium	Critical	Raise funding, reduce burn, prioritize revenue
Key person unavailable (Lejla, Nermin)	Low	High	Cross-train, document everything, engage contractors if needed
Vapi API fails or shuts down	Low	High	Build fallback voice solution, diversify vendors
Market too small	Low	High	Expand to adjacent markets (senior care, hospice, therapy)

Risk Review: Monthly (Dženan leads)

7. Success Metrics (KPIs)

7.1 North Star Metric

MRR (Monthly Recurring Revenue)

Target trajectory:

- Month 3: \$500-1,000
- Month 6: \$2,000-3,000
- Month 9: \$4,000-5,000
- Month 12: \$8,000-10,000

7.2 Supporting Metrics

Metric	Month 3	Month 6	Month 12	Why It Matters
Customers	10	30	100	Growth
MRR	\$1,000	\$2,500	\$8,000	Revenue
Churn	<10%	<5%	<5%	Retention
NPS	>40	>50	>60	Satisfaction
CAC	<\$500	<\$500	<\$400	Efficiency
LTV	>\$1,000	>\$1,500	>\$2,000	Profitability
LTV/CAC	>2:1	>3:1	>5:1	Unit economics

7.3 Vanity Metrics (Don't Optimize For)

- Website traffic (unless converting)
- Social media followers (unless engaging)
- Email list size (unless opening/clicking)

Focus on: Revenue, retention, customer satisfaction. Everything else is secondary.

8. When to Hire Real Humans

Principle: Hire when pain > cost.

Signals to hire:

Role	Hire When...	Expected Timeline
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US Sales Rep	Cold outreach takes >20h/week (Selma's capacity)	Month 3-4
Customer Success Manager	>20 customers, churn >5%	Month 5-6
Developer (BiH)	Virtual agents can't keep up with backlog	Month 6-9
DevOps (BiH)	Infrastructure requires >10h/week (Nermin's capacity)	Month 9-12
QA (BiH)	Manual testing takes >20h/week	Month 9-12

Don't hire prematurely. Virtual agents scale well. Only hire when absolutely necessary.

9. Document Control

Version	Date	Changes	Author
1.0	2026-01-28	Initial document	John + Selma + Amina

Next Review: 2026-04-01 (quarterly)

Owner: Alem Basic **Maintained By:** John (Director) + Selma Mustafić (BA) + Amina Hadžić (Head of Projects)

End of Growth Plan

From 0 to 100 customers in 12 months. Clear milestones, clear metrics, clear go/no-go decisions. Execute. Measure. Adjust. Grow.