



**ORTHOPEDIC CARE
PARTNERS**

Website Modernization & Streamlined Management for Multi-Practice Growth

Orthopedic Care Partners' partner practices need modern, easy-to-manage websites that support patient growth and streamline updates. This Statement of Work outlines Levo Health's approach to redesigning and managing these sites with consistent infrastructure, improved usability, and scalable workflows that maintain each practice's local identity.



Dallas | NYC | Tampa | levohealth.com



Empowering Healthcare

Levo Health is a full-service healthcare advertising and consulting agency that partners with physicians, medical groups, surgery centers, hospitals, pharmaceutical companies, med-tech innovators, and digital health brands. With offices in Tampa, New York, and Dallas, Levo Health supports forward-thinking healthcare organizations nationwide and internationally.

As a healthcare consultancy focused on marketing, sales, and operations, Levo Health is uniquely equipped to support a project of this scope. This engagement will require close collaboration between strategy and design teams to deliver healthcare-forward creative, ad operations, and copywriting teams to launch and manage performance-driven campaigns, and a development team capable of building pragmatic, intuitive user experiences and outreach platforms.

Levo Health works in an agile, collaborative manner. This means:

- Developing a shared strategy and coordinated launch plan
- Prioritizing services based on your business goals and patient needs
- Remaining flexible and adaptive, even as scope or priorities shift

To deliver results quickly and consistently, Levo Health will provide a dedicated team of designers, copywriters, developers, ad operations specialists, marketing automation experts, and account managers, working together to create value from day one.

Brand Safe & Patient Safe



Levo Health is SOC 2 Certified and HIPAA compliant to ensure data sets, campaigns, analytics, and workflows are built to be compliant with HIPAA, DAA, NAI, and internal MLR standards.

People-Based Identity Targeting

PBI provides Levo Health clients with true omnichannel reach to their consumers. Real-world touchpoints comprise offline data and are deterministically linked with addressable online identifiers to provide a people-based, omnichannel marketing approach, enabling Levo Health to reach your target audience with a personalized consumer experience.

Our modern approach to analytics uses technology to combine large-scale data sets in a privacy-safe way. Levo Health's data models include Rx, OTC, clinical, claims, consumer, hospital, media data, and more, representing over 320 million health lives.

D2P

From Pixels to Patients

Find hard-to-reach patients at scale.

Levo Health pinpoints hard-to-reach patient populations, elevating awareness, strengthening brand presence, and driving engagement with specific patient cohorts at key care milestones



ICD 9/10 Codes

Target patients by disease state



Prescription Behavior

Inclusion of past & current medications



Type of Insurance

Segment by payer type and plan



OTC Product Purchases

Target consumer OTC buying habits



Consumer Brand Behaviors

Consumer purchases and affluence



Patient Communities

Align with qualified patient cohorts



Mobile ID
EA7583CD-A667-48BC-B806-42ECB2B48606
Age Cohort
55 - 84

Disease State(s)
J32.9 - Chronic sinusitis,
unspecified

Pharmacological Therapies
fluticasone, budesonide,
mometasone and beclomethasone

People-Based Identity Targeting

HCP

Clinical Targeting

Highly relevant and personalized to HCP Cohorts

Our approach to clinical targeting is designed to be highly relevant and tailored to specific HCP cohorts, ensuring that each outreach effort aligns with the most engaged and influential healthcare professionals.

By prioritizing 1:1 NPI data, we leverage real-time physician-level insights, claims, and EHR activity to pinpoint HCPs based on their prescriptive behavior, patient treatment journeys, and brand interactions.

This data-driven strategy enables us to create dynamic, prioritized NPI lists that guide omnichannel targeting efforts.



HCP Persona 1

Age 40 - 65 Gender Female Geographic Location NY, FL, TX, & CA

Subspecialty General Practitioners (12,628), Endocrinologists (8,177) and mid-level providers

↑ 9.21% of HCPs | 59.3% of Patients with hypothyroidism | - 11.31% of HCPs | 20.6% of Patients with hypothyroidism

Psychographics

Dr. Sofia Richards is a seasoned endocrinologist at a metropolitan hospital's specialized endocrine center. With a deep commitment to advancing thyroid disorder treatments, Dr. Ramirez is at the forefront of adopting innovative therapies that offer her patients the best outcomes. She values detailed clinical data and patient-reported outcomes in deciding on new treatments.

Key Drivers for Awareness

Advanced Clinical Data: Detailed studies and trial results showcasing the brand's performance in managing hypothyroidism.

Peer Recommendations: Testimonials from fellow endocrinologists and case studies that demonstrate successful patient outcomes.

Professional Development: Advanced seminars and symposiums discussing the latest in thyroid health and treatment strategies.

Psychographics

- E03.9 (Hypothyroidism, unspecified) - 34,784
- E00 (Congenital iodine-deficiency syndrome) - 32,124
- E01 (Iodine-deficiency related thyroid disorders and allied conditions) - 21,103

Prescription Brands

- Armour Thyroid
- NP Thyroid
- Tapazole
- Northyx

Demographic Mix

- 72% of practicing endocrinologists are 40+
- 69.8% of practicing endocrinologists are women
- 59.4% of practicing endocrinologists are white

Data-Driven Multichannel Engagement for HCPs

With comprehensive insights into each physician's engagement patterns and treatment algorithms, Levo Health can deliver customized messaging across multiple channels, enhancing brand awareness and ensuring that the most impactful HCPs receive timely, relevant information aligned with Orthopedic Care Partners's objectives.



ICD 9/10 Codes

Target patients by disease state



Prescribing Behavior

TRx, NPS, Script Change, Script Lift



Insurance & Commercial Claims

Billing behavior and claims data



National Provider Identifier (NPI)

1:1 data on providers and referring HCPs



Provider

Facility, bed count, employees, etc.



EHR & Practice Management

Point of care, provider intranets



Project Management Process

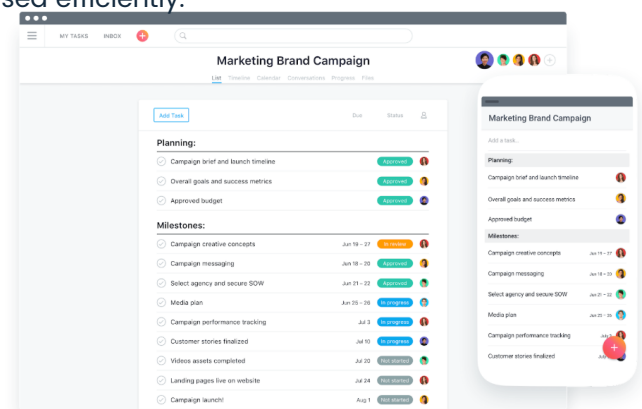
People, Processes, and Production

Managing a multi-brand digital healthcare engagement requires structure, transparency, and disciplined execution. Levo Health specializes in coordinating large-scale digital initiatives while staying focused on business priorities. Our project management approach eliminates inefficiencies and ensures resources are directed toward the most impactful work.

Meeting Cadence: Levo Health will lead weekly meetings with Orthopedic Care Partners' leadership team to review active initiatives, track progress, align strategic priorities, and plan upcoming phases. These sessions will maintain momentum, surface roadblocks early, and ensure clarity across workstreams. Project plans and timelines will be managed in Asana, providing real-time visibility and accountability.

Project Reporting and Guardrails: All requests, deliverables, and updates will be centralized through Asana. Levo Health will collaborate directly with Orthopedic Care Partners' leadership to evaluate and approve any new initiatives. A structured review process will guide scope changes or pivots, ensuring priorities remain aligned and resources are used efficiently.

Timelines and Continuity: Foundational tasks such as site audits, redevelopment planning, and CMS standardization will be completed early in the engagement. Website builds, training, and post-launch support will follow a clearly sequenced roadmap. Levo Health's structured process ensures operational clarity, long-term continuity, and scalable execution across all partner practices.





Executive Team

Fergus Linskey | Chief Executive Officer & Co-Founder

Fergus has the privilege of leading a bright and talented group of seasoned healthcare marketing and consulting professionals from various disciplines. A creative problem solver and strategic thinker, Fergus has over 25 years of experience in the healthcare marketing field, with the majority of his time spent in Integrated marketing communications, patient engagement, and user experience design.

David M. Williams | Chief Operating Officer & Co-Founder

David is responsible for founding and creating the strategic function at Levo Health while also overseeing all brand, digital, media, internal and external partnerships, initiatives, corporate development, growth, and acquisition efforts for the agency.

Over the past 17 years, David has worked with hundreds of medical groups, ASCs, hospitals, medical device companies, life science companies, and healthcare tech companies. David also oversees the agency's business operations—from maintaining key accounts to managing departments that can scale and adapt to growth while providing a culture that delivers imaginative ideas.

Heath Friar | Chief Marketing Officer

Heath manages and implements all creative marketing efforts for the agency and its clients. He is also responsible for bringing Levo Health's client stories to life by managing a team of skilled videographers, editors, and motion graphics animators.

As a healthcare marketing professional with over 18 years of industry experience, Heath brings a vast knowledge of branding, multimedia specialties, and interactive marketing strategies to Levo Health's clients with a creative edge that sets his clients apart from the competition.

Rick Silva | Chief Technology Officer

Rick leads Levo Health's team of web developers, database engineers, programmers, and designers. Over the past 30 years, Rick has worked in agency and in-house roles, focusing primarily on healthcare companies.

Rick excels in leveraging technology to solve complex technological inefficiencies. Additionally, Rick ensures that all digital products are optimized for each deployment and built on the latest and most secure HIPAA-Compliant platforms with an eye for design.



Marketing, Sales & Operations Alignment

In today's healthcare environment, aligning marketing, sales, and operations is essential for sustainable growth and better patient outcomes.

Marketing: Storytelling and Information Dissemination

Marketing is not just about promoting services. It's about educating patients, setting clear expectations, and building trust. Using data-driven strategies, Levo Health identifies what matters most to patients and creates messaging that resonates. These efforts should directly support the patient journey from discovery to appointment scheduling.

Sales: The Personalized Patient Experience

Every patient is different. A well-integrated intake and reporting system provides key insights into behavior and preferences, allowing your teams to deliver tailored communication that improves conversion and supports stronger outcomes.

Operations: Fulfilling the Promise

Marketing and sales cannot succeed if operations cannot deliver. Ensuring your staff is trained to meet the expectations created by outreach is critical. Operational alignment also enables consistency, which builds trust, satisfaction, and referrals.

The Interplay: A Symbiotic Relationship

When marketing, sales, and operations work together, everything improves. Campaigns perform better, patients convert faster, and your team can plan more effectively. This alignment supports predictable growth across Orthopedic Care Partners' network, resulting in more engaged patients and more efficient practices.

1. **Simplify Marketing Operations:** Standardize templates, workflows, and reporting to improve visibility and speed across all practice sites.
2. **Scale Patient Volume:** Enhance each practice's digital presence to drive referrals, increase traffic, and convert more patients.
3. **Consolidate Technology Stacks:** Streamline CMS platforms, plugins, and hosting into a secure, manageable system.
4. **Support & Optimize Continuously:** Maintain uptime, apply security updates, and use analytics to



ORTHOPEDIC CARE
PARTNERS

A Multi-Year Partner with Proven Performance

Levo Health has served as a trusted marketing and digital partner to Orthopedic Care Partners and its affiliated practices for more than five years. During this time, we have provided full-service support including direct-to-patient marketing, website development, creative strategy, and patient-level advertising to increase patient volume, improve access, and drive measurable return on investment.

Historically, Levo Health engaged directly with individual practices under separate agreements. This model allowed for deeply customized strategies and one-to-one tracking that consistently delivered strong performance at the practice level. However, without broader coordination from OCP leadership, these efforts remained largely siloed. While results were strong within each engagement, the network missed opportunities to unify reporting, scale winning strategies, and create consistency across the larger system, which we solved for TOI years ago.

As the relationship has evolved, Levo Health has continued to adapt to the growing needs of OCP and its network. We have absorbed expanded responsibilities, many of which extend beyond the original scope of past proposals, without compromising performance or responsiveness. Most recently, we took on a complex software development for **OCP's CareLine platform** under our existing relationship. Outside of this, we would have charged \$50,000 to have an enterprise-level piece of software built.

In recognition of our long-term partnership, Levo Health has been maintaining its original retainer rate from 2018, offering a 63% reduction from current agency market rates, and extended that structure across the entire network.

Centralized Strategy, Local Execution

This proposal represents a shift toward an enterprise-level approach, emphasizing centralized strategy and localized execution. By deploying templated systems across practices while maintaining flexibility at the local level, we can bring consistency, scalability, and visibility to all participating groups within the OCP ecosystem.

As this infrastructure comes online, Levo Health is also positioned to align marketing activity, both paid and organic, back to clinical and claims-level outcomes. This enables a shift from lead-based reporting to performance models based on cost-per-case, procedure volume, and long-term patient value.

Simplify Marketing Operations

Levo Health has supported Orthopedic Care Partners and its affiliated practices for years. We've already deployed many of the workflows, messaging strategies, and tools outlined below for individual practices, particularly for those under long-term contract. However, outside of The Orthopaedic Institute (TOI), what's often been missing is a dedicated internal marketing lead to bridge day-to-day coordination between Levo Health and the practice.

This lack of an internal point of contact has historically limited the consistency and speed of execution across practices. With the opportunity to scale enterprise-wide, we can now build on what's already working. Standardizing tools, templates, and reporting infrastructure across all participating practices, while enabling local teams with the support they've previously lacked.

This approach gives OCP the best of both worlds: centralized consistency with localized flexibility, backed by a partner who already understands the operational, clinical, and market nuances across the network.

How We Propose to Simplify and Scale

- **Unified Messaging with Local Adaptation:** Consistent brand voice with customizable components for regional relevance.
- **Centralized Marketing Tools:** Shared platforms for campaign deployment, social scheduling, and analytics.
- **Reusable Templates:** Email, ad, and print templates editable at the practice level.
- **Culturally Relevant Messaging:** Tailored language and positioning based on local demographics and care trends.
- **Region-Specific Content Strategy:** Targeting high-prevalence conditions or referral patterns unique to each market.
- **Insurance Mix Awareness:** Content that reflects local payer dynamics and intake workflows.
- **Cross-Practice Benchmarking:** Identify and scale best-performing campaigns and content.
- **Patient Journey Mapping:** Analyze behavior to improve engagement and conversion flow.
- **Workshops and Training:** Equip local staff with tools and guidance for consistent execution.
- **Two-Way Feedback Loops:** Continuous alignment between local teams and corporate leadership.
- **Market Monitoring:** Detect competitive shifts and patient expectations in real time.
- **Centralized Dashboards:** Shared reporting tools for marketing and clinical performance.
- **Support for Innovation:** Encourage practice-level testing with network-wide scalability.
- **Ongoing Training:** Keep teams current on compliance, tools, and evolving best practices.

Levo Health doesn't need a ramp-up period. We've already done this work across OCP. What's been missing is alignment. With the right structure in place, we can scale everything that has worked at the practice level into a coordinated, measurable system across the network. This engagement connects what is already proven to what is now possible.

Consolidate Technology Stacks

Levo Health currently manages the majority of OCP-affiliated websites under a standardized, HIPAA-compliant WordPress framework. These properties share a common CMS, plugin architecture, and backend infrastructure built for security, performance, and long-term scalability. However, a small number of practices within the OCP ecosystem still operate outside of this model, with inconsistencies across CMS versions, hosting environments, and administrative access.

This engagement is not just a website refresh, it is a full digital infrastructure consolidation that brings every OCP-affiliated site and supporting systems into a unified, compliant, and scalable model. This foundation is essential for future phases, including attribution modeling, advanced analytics, and real-time marketing performance measurement.

Consolidation Process

- **Technology Audit:** Document CMS version, PHP environment, plugin inventory, and technical debt across all non-standard sites
- **Access Aggregation:** Secure hosting, domain, and admin credentials for central access and ongoing management
- **Data Security Compliance:** Ensure all systems meet HIPAA-aligned access and credential handling protocols
- **Traffic and Usage Analysis:** Prioritize redevelopment of high-traffic or high-value sites to maximize early impact
- **Business Criticality:** Flag mission-critical or revenue-generating sites for early-phase migration
- **Technical Complexity Review:** Sequence work around sites with outdated, heavily customized, or unsupported codebases
- **Stakeholder Input:** Collect feedback from regional leadership to ensure practice-level needs are captured in the rollout
- **CMS Standardization:** Extend Levo's current WordPress ecosystem, using a shared theme and plugin set with built-in flexibility for localized needs

Redevelopment Stages

Levo Health will manage a phased rollout that ensures consistency, quality, and minimal disruption. This includes QA workflows, practice communication, and infrastructure testing for all redeveloped properties.

- **Preparation Phase:** Complete technical audit, gather access credentials, and prioritize sites based on performance, complexity, and impact
- **Pilot Redevelopment:** Begin with one or two lower-complexity sites to validate workflows, templates, and system integration
- **Full-Scale Rollout:** Migrate remaining sites in structured waves based on business needs, feedback, and technical considerations

Scale Patient Volume

Scaling patient volume across OCP's diverse network requires a localized, data-informed strategy that reflects the unique dynamics of each market. Levo Health has already helped drive measurable growth for individual OCP practices. This engagement allows us to apply that experience at the enterprise level by assessing practice potential, aligning budgets with opportunity, and executing regional campaigns focused on high-value cases. Our strategy is grounded in patient behavior, referral pathways, and payer mix. It is designed to drive increases in qualified volume across core service lines such as orthopedics, spine, sports medicine, and joint replacement.

Assessing Each Practice and Market

- **Practice Assessment:** Evaluate each practice's growth potential based on historical volume, market saturation, competition, and past marketing activity.
- **Resource Allocation:** Distribute budgets based on opportunity and projected return. Underserved or competitive markets may require additional investment.

Aligning Strategy with Profitability and Capacity

- **Procedure Profitability Mapping:** Use claims, EHR data, and payer mix to identify high-margin procedures and service-line opportunities in each region.
- **Patient Volume Targeting:** Establish acquisition goals based on available capacity, reimbursement rates, and patient flow patterns.

Building Localized Campaign Funnels

- **Awareness Stage:** Launch search, SEO, display, and social media campaigns to promote key services such as joint replacement and minimally invasive spine care.
- **Consideration Stage:** Engage prospective patients with educational content, physician introductions, outcome highlights, and testimonials.
- **Conversion Stage:** Drive appointment requests using optimized landing pages, clear calls to action, direct scheduling, and automation workflows.
- **Retention Stage:** Re-engage existing or lapsed patients through preventive outreach, screening reminders, and condition-specific follow-ups.

Execution and Optimization

- **Local Team Collaboration:** Work with practice leaders and staff to ensure campaigns reflect availability, priorities, and patient expectations.
- **Performance Tracking:** Monitor all campaign activity through centralized dashboards that report lead flow, cost per case, and conversion outcomes.
- **Feedback Loops:** Use insights from practice managers, staff, and patients to fine-tune targeting, content, and campaign timing.
- **Ongoing Adaptation:** Adjust strategies in response to market shifts, competitive pressure, or seasonal fluctuations to keep performance strong.

Scope of Services Overview

This engagement is structured in phases to ensure clarity, efficiency, and scalability across Orthopedic Care Partners' partner practices. Each tier includes foundational work along with the option to expand based on individual practice needs. The following outlines the key project phases and services.

Pre-Phase 1: Pre-planing Roadmap | ASAP

- Review & Assessment of Existing Practice Sites
- Project Management & Timeline Development
- Site Architecture & Usability Planning

Phase 1: Infrastructure Alignment & Pilot Deployment | Q3 2025

- Website templating and pilot deployment
- Hosting, DNS, and domain centralization
- Form processor and analytics standardization
- ModMed scheduling integration
- Creative and brand system development
- AI workflow evaluation and LLMS.txt deployment

Phase 2: Multi-Practice Standardization & Marketing Activation | Q4 2025

- Site migration for 4 practices
- Shared dashboard deployment
- SEO and content block rollout
- AI-supported creative production
- Paid search campaign launch
- AEO support and Q&A content formatting
- Review and reputation management
- Patient-level targeting exploration

Phase 3: Network-Wide Rollout & Intelligence Layer | Q1-Q2 2026

- Remaining site migrations
- Centralized data environment planning
- Attribution modeling and campaign mapping
- LTV and cost-per-acquisition dashboards
- Landing page and UX testing
- Expanded AEO content optimization

Phase 4: Optimization, Expansion, and Scalable Best Practices | Q3-Q4 2026

- Conversion Rate Optimization program launch
- Testing on YouTube, Meta, Bing, and programmatic
- Offline event integration for value-based bidding
- Forecasting and benchmarking models
- Onboarding playbook development for future sites



**ORTHOPEDIC CARE
PARTNERS**

Optional Add-On Services

Levo Health is a full-service healthcare marketing and consulting agency. The following add-on services reflect our broader capabilities beyond the foundational scope of this engagement. Many of these services are typically included in our traditional monthly retainer structure, which allows practices to scale efforts across multiple areas while benefiting from bundled pricing and dedicated support.

For practices or partner networks seeking to expand their digital presence, campaign strategy, or patient engagement programs, bundling services into a single monthly retainer can offer significant cost efficiencies and operational continuity.

Optional Expanded Services

- Creative Services
- Branding & Identity Creation
- Video Production
- Landing Page Design & Development
- Review & Build Audience Personas
- Integrated Marketing Campaigns & Media Buying
- Advertising & Funnel Optimization
- Ongoing SEO Management
- People-Based Identity Targeting
- Customer Journey & Marketing Automation
- Patient Satisfaction & Testimonial Program
- Patient Experience Management (PXM)
- Social Media Listening & Engagement
- Point-of-Care Advertising
- Digital-Out-of-Home (DOOH)
- Claim & Optimize Local Listing (Local SEO)

Levo Health's current retainer-based model, which OCP practices have successfully used for years, starts at \$5,000 per month and includes all of the services outlined in this plan, along with ongoing strategy, execution, and optimization support.

Levo Health Rollout Summary

Phased Rollout

Levo Health's approach focuses on building a scalable, enterprise-grade marketing and digital infrastructure that brings consistency, performance visibility, and operational efficiency across the OCP network. Each phase is designed to build momentum, reduce friction, and deliver measurable results while maintaining flexibility at the local practice level.

Phase	Timeline	Focus
Phase 1	Q3 2025	Foundation & Pilot
Phase 2	Q4 2025	Multi-Practice Standardization & Marketing Activation
Phase 3	Q1–Q2 2026	Network-Wide Rollout & Intelligence Layer
Phase 4	Q3–Q4 2026	Optimization & Scalability

Website Rollout

The phased approach outside of Phase 1 is completely flexible. With a full understanding of all websites, and an existing relationship with 8 of the 10 websites and practices, Levo Health is prepped to begin once the rollout plan is approved.

Practice Name	Phase	Complexity
Tucson Orthopedic Institute	Phase 1	Difficult
Citrus Orthopaedic & Joint Institute	Phase 2	Easy
Orthopedic Specialty Institute	Phase 2	Easy
Orthopedic Care Partners	Phase 2	Medium
Spine Care Partners	Phase 2	Easy
The Steadman Clinic	Phase 3	High
The Orthopaedic Institute	Phase 3	High
The Orthopaedic Partners	Phase 3	High
Motion Orthopaedics	Phase 3	High
Veronica Diaz, MD	Phase 3	Medium

Phase 1: Infrastructure Alignment & Pilot Deployment

Timeline: Q3 2025

Phase 1 will focus on establishing the foundational systems and controls necessary to scale efficiently across the OCP network. Tucson Orthopedic Institute will serve as the pilot group for this rollout, allowing us to validate the new templated infrastructure and resolve operational dependencies before broader expansion.

Why Tucson Orthopedic Institute? Levo Health has recently completed new website builds for The Orthopaedic Partners, The Orthopaedic Institute, and Motion Orthopaedics. All three are now stabilized and performing. Tucson Orthopedic Institute presents the greatest near-term opportunity to enhance the digital patient experience. The site has already been mapped in prior Statements of Work, giving us a head start on implementation.

Continue the Adoption of AI: This phase also provides an opportunity to identify and test practical, operations-focused uses of AI to streamline internal workflows and reduce manual friction. Levo Health already integrates AI across creative development, media management, and analytics workflows. In this phase, we will explore additional opportunities to responsibly introduce AI-powered enhancements, particularly where they can support intake efficiency, content structuring, and reporting.

As part of this effort, **Levo Health has already deployed LLMS.txt**, a tool designed to curate and structure a website's most AI-digestible content to improve inference, answer engine visibility, and future AEO performance.

This foundational phase ensures every participating practice starts from a consistent, secure, and scalable baseline. The focus will remain on operational readiness, measurable performance, and preparing for scalable growth.

- **Pilot Launch:** Full migration of Tucson Orthopedic Institute to the new templated website infrastructure.
- **Key Activities**
 - **Infrastructure Control:** Centralization of hosting, DNS, and domain management to streamline updates and reduce risk.
 - **Tracking Standardization:** Deployment of HIPAA-compliant form processors, server-side analytics packages (GA4, Meta Pixel, call/SMS tracking), and conversion event tagging.
 - **Scheduling Integration:** Alignment of ModMed-compatible workflows for direct scheduling, form-based capture, and SMS/chat intake.
 - **Creative Systemization:** Establishment of centralized creative and messaging guidelines to ensure consistency in brand voice, tone, and compliance across all practices.
 - **AI-Driven Workflow Evaluation:** Identify areas where AI can enhance operational efficiency or creative throughput without compromising governance or compliance.

Phase 2: Multi-Practice Standardization & Marketing Activation

Timeline: Q4 2025

With foundational systems in place and the Tucson Orthopedic Institute pilot completed, Phase 2 will expand infrastructure and activate full-funnel marketing programs across additional participating practices. This phase focuses on scaling proven systems, centralizing performance visibility, and launching high-impact marketing efforts with clear attribution and return metrics.

By this point, all participating practices will have access to centralized tools, shared creative assets, consistent tracking frameworks, and aligned scheduling workflows. This alignment allows us to confidently roll out search, display, and local campaigns that are optimized for efficiency and tailored to local market demand.

Key Activities

- **Website Infrastructure Expansion:** Migrate 4 additional practices (of the 10 total participating sites) to the templated platform, prioritizing those with the most marketing readiness or operational gaps.
- **Performance Marketing Activation:** Launch paid search campaigns using brand and non-brand segmentation. Campaigns will be built with proximity-based targeting, call tracking, form conversions, and structured UTM data for clean attribution.
- **Analytics and Dashboard Rollout:** Deploy shared dashboards to provide near real-time visibility into spend, lead volume, conversion rates, and scheduling performance across practices.
- **Content and SEO Scaling:** Launch a systemized content block strategy to support core service-line pages, Q&A formatting, physician profiles, and location-specific landing pages.
- **Support for AEO Visibility:** As part of our structured content strategy, we will format service and FAQ content to support emerging Answer Engine Optimization (AEO) opportunities across platforms like Google SGE, ChatGPT, Gemini, and Perplexity. While AEO traffic remains a small share of overall search today, our approach ensures practices are positioned to benefit as adoption grows.
- **Creative and Brand Cohesion:** Ensure all paid and organic content adheres to centralized messaging guidelines while allowing room for practice-level nuance.
- **Review and Reputation Management:** Roll out a consistent review aggregation and response system using tools like BirdEye or a preferred vendor, focused on enhancing local authority and trust signals.
- **AI-Supported Expansion:** Continue testing AI-assisted tools to accelerate content production, landing page versioning, and performance insight generation where it supports speed and compliance.

Phase 3: Network-Wide Rollout & Intelligence Layer

Timeline: Q1–Q2 2026

With templated infrastructure, analytics, and performance programs in place across the initial wave of practices, Phase 3 will focus on completing the rollout across all ten participating sites and building the centralized intelligence layer needed to support deeper insights, scalable optimization, and long-term measurement.

This phase is where data becomes a strategic asset. By consolidating performance data, scheduling outcomes, and intake trends, we can identify which campaigns, geographies, and service lines are driving the most measurable value. It will also introduce the development of a secure, HIPAA-compliant reporting environment. This environment, structured similarly to a Snowflake-style data warehouse, will give OCP leadership unified and actionable visibility into marketing and operational performance.

Key Activities

- **Complete Platform Rollout:** Transition the remaining practices to the standardized website infrastructure, analytics framework, and intake workflows.
- **Centralized Data Architecture Planning:** Begin development of a secure performance data environment that integrates campaign performance, scheduling outcomes, and intake sources across all practices. This system will support scalable reporting, attribution modeling, and future platform integrations.
- **Attribution and Insight Mapping:** Correlate ad performance with scheduling outcomes where permitted, using available practice access and data structure. This enables directional attribution of marketing campaigns to patient value.
- **Advanced Dashboarding:** Expand dashboard views to include LTV modeling, cost per appointment, and performance by procedure and geography. Create executive-level summaries with drill-down functionality by practice.
- **Ongoing SEM Optimization:** Refine campaign structures based on actual downstream performance. Shift budget to higher-performing markets, suppress low-value queries, and apply more advanced targeting layers such as in-market and custom intent audiences.
- **Landing Page and UX Testing:** Launch A/B tests across key conversion pathways to identify improvements in form design, copy variations, and CTA placement.
- **AEO and Content Optimization:** Continue expanding structured content in support of answer engine visibility on Google SGE, ChatGPT, Gemini, and other AI platforms. Monitor performance and adjust based on inclusion and engagement data.

This phase ensures OCP is not just participating in digital marketing, but using it to drive meaningful outcomes. With centralized systems and insights across all ten practices, Levo Health will help OCP make data-informed decisions, optimize spend, and scale proven strategies across the entire network.

Phase 4: Optimization, Expansion, and Scalable Best Practices

Timeline: Q3–Q4 2026

With all ten participating practices fully aligned on a unified digital infrastructure and performance framework, Phase 4 focuses on optimizing every layer of the system and expanding into new channels, data models, and workflows that support continued growth, efficiency, and long-term scalability.

This phase ensures the system is not only stable and measurable, but also future-ready. We will refine campaign performance, test new media opportunities, and formalize a repeatable onboarding and reporting structure that allows future practices to integrate seamlessly.

Key Activities

- **Conversion Rate Optimization (CRO):** Implement a formal CRO program across all live sites, using data from heatmaps, user behavior, and A/B tests to improve patient experience and increase conversion rates.
- **Expansion to Select New Channels:** Launch controlled tests on platforms such as YouTube, Meta, Bing, or programmatic display where targeting aligns with high-performing service lines. Evaluate and scale based on performance thresholds.
- **Unified Review and Reputation Management:** Standardize feedback loops and review generation across all practices using preferred tools to support local SEO, brand trust, and consistency.
- **Full Attribution Model Activation:** With the centralized data environment established, begin pushing qualified offline events (such as completed appointments) back into ad platforms to support advanced value-based bidding strategies and audience modeling.
- **Performance Benchmarks and Forecasting:** Use historical campaign data and intake trends to develop baseline performance models by service line, geography, and acquisition channel. Establish quarterly forecasts to support network-level planning and budgeting.
- **Patient-Level Data Targeting and Modeling:** Explore HIPAA-compliant opportunities to refine targeting using de-identified patient-level data, including diagnosis, prescription, and appointment behavior. Where permitted, we will build audience segments that inform campaign strategy and improve relevance and performance.
- **AEO Monitoring and Refinement:** Continue to refine structured content to support answer engine visibility across emerging platforms like Google SGE, ChatGPT, and Gemini. Monitor inclusion and engagement data and adjust strategy accordingly.
- **Scalable Onboarding Framework:** Finalize a documented onboarding and deployment playbook for future practices joining the OCP network. This will include infrastructure standards, QA processes, creative templates, and integration timelines.

Phase 4 transitions OCP from foundational marketing execution to enterprise-level optimization. By combining scalable tools, centralized reporting, and actionable data, the organization will be positioned to drive smarter decisions, unlock new growth opportunities, and onboard future practices with confidence and speed.

Special Project | From Click to Case: Closing the Loop Between Marketing & Patient Outcomes

Most healthcare marketing stops at the point of lead generation. Levo Health has always taken a broader view, focusing on how marketing performance aligns with patient outcomes, clinical volume, and long-term value.

Levo Health previously solved this challenge for The Orthopaedic Institute (TOI) by structuring marketing data into a unified, reliable format. That dataset powered near real-time reporting with Varsity, linking advertising activity to downstream case volume. Although the system was deprecated during OCP's EHR transition, the original logic, API structure, and codebase remain fully intact.

With ModMed now functioning as the single source of truth across OCP practices, the opportunity to reintroduce this closed-loop infrastructure is stronger than ever.

What We're Solving For

Levo Health will align advertising performance data across paid, organic, and referral channels, with scheduling, clinical activity, and claims-level data to:

- Move from cost-per-lead to cost-per-case
- Model patient acquisition trends by service line, geography, and campaign
- Predict downstream revenue based on top-of-funnel activity
- Support smarter budgeting and market allocation
- Provide OCP leadership with accurate, near real-time forecasting tied to actual patient outcomes

The Foundation for Closed-Loop Attribution

To connect marketing performance with clinical and financial outcomes, Levo Health will implement a **HIPAA-compliant data lake**, a centralized environment that securely ingests and structures data from marketing channels, intake systems, and ModMed.

This data lake acts as the engine behind outcome-based marketing, enabling advanced attribution, patient-level forecasting, and real-time insight delivery across all participating practices.

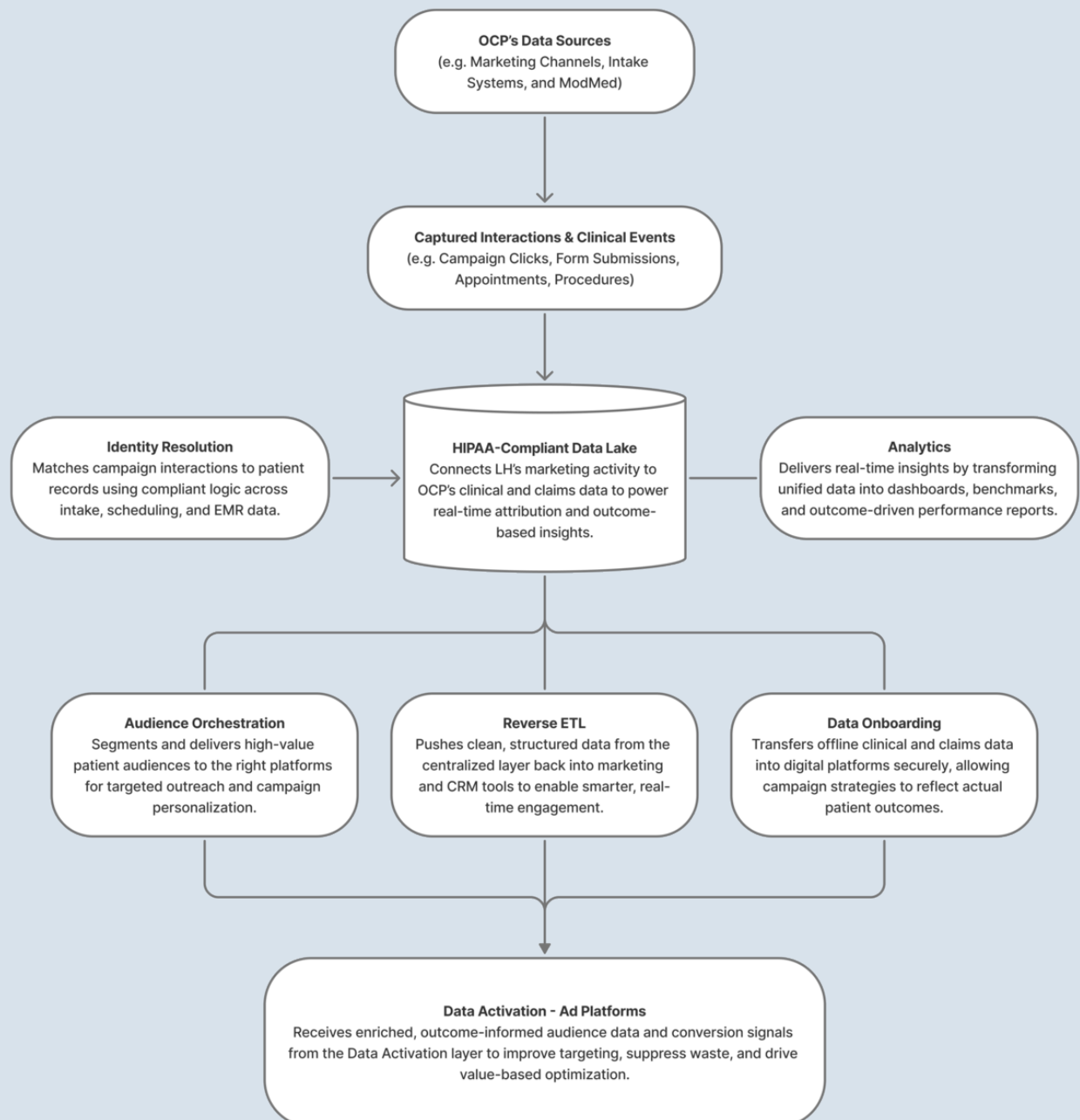
It creates a unified layer where campaign activity and clinical results can be measured together, laying the groundwork for a scalable, closed-loop system that drives smarter investment and measurable impact.

The following page outlines how this system will work across the OCP network. To note, Orthopedic Care Partners will need BAAs in place to finalize this project.

Special Project | From Click to Case: Closing the Loop Between Marketing & Patient Outcomes

How It Will Work

Levo Health will route all marketing activity through a centralized data layer, where it will be securely parsed, cleaned, and matched against clinical and claims data originating from ModMed. Our logic and APIs, already proven at scale, will provide the framework to reestablish attribution models across practices, now under one unified EHR.



Special Project | From Click to Case: Closing the Loop Between Marketing & Patient Outcomes

Implementation Realities: Cost, Lift, and What's Required

Building a HIPAA-compliant, closed-loop attribution system is both possible and valuable, but it is not turnkey. Levo Health has built this exact enterprise model before and understands the technical, operational, and financial lift required to do it right. This is not a plug-and-play vendor stack. It is a purpose-built system that requires careful planning, cross-team coordination, and long-term investment.

Build, Buy, or Lease? A Strategic Framework for Attribution

When it comes to closed-loop attribution, healthcare organizations typically have three paths: build, buy, or lease.

- **Build:** Develop a fully custom system from the ground up. While this provides full control, it requires substantial time, resources, internal coordination, and compliance oversight. Most builds stall under their own complexity or lack of institutional support.
- **Buy:** Purchase a vendor platform that offers attribution or data stitching. These tools are often faster to implement but rarely integrate deeply with healthcare systems, lack transparency in how attribution is calculated, and may not meet HIPAA or governance standards
- **Lease:** Assemble a patchwork of third-party tools to simulate attribution. This approach may appear cost-effective but often leads to data silos, limited scalability, and little control, especially in regulated environments

Levo Health offers a fourth option: we are providing a build, but not from scratch. Levo Health has already developed the framework, validated it within OCP, and can deploy it again with a clear roadmap and cost structure. This is a customized solution designed specifically for healthcare. It is compliant, fully transparent, and grounded in operational and regulatory reality. We deliver the speed of a pre-built platform combined with the flexibility of a custom deployment.

Most industries find server-side integrations relatively straightforward and affordable. In healthcare, however, the reality is different. Governance, consent frameworks, PHI handling, and compliance oversight increase both cost and complexity. These must be addressed early to develop a system that performs well, scales effectively, and remains compliant under scrutiny.

If someone suggests they can solve this by simply plugging in a handful of vendors, they are not operating with a healthcare-informed mindset.

Why Levo Health Is Positioned to Deliver This

Levo Health is not starting from scratch. Our team has already built, tested, and deployed this model inside OCP's ecosystem. With the foundational logic, codebase, and operational insight in place, we are uniquely positioned to reintroduce this system with clarity, speed, and compliance.

Special Project | From Click to Case: Closing the Loop Between Marketing & Patient Outcomes

Implementation Realities: Cost, Lift, and What's Required - Continued

A Purpose-Built Initiative, Not a Stack of Tools

Implementing a closed-loop, HIPAA-compliant attribution system is a specialized project that requires clear scope, coordination, and governance. Assembling disconnected tools without structure or oversight leads to fragmented data, unreliable results, and unnecessary cost.

Levo Health has already built and tested the core framework within the OCP environment. With access to key systems and stakeholder alignment, we will scope the architecture, define workflows, and deliver a phased implementation plan with clear ownership, cost visibility, and operational sustainability.

This is a strategic build, not a quick fix. When developed with the right foundation and alignment, it creates long-term value across the entire network.

Core Components Required

- **HIPAA-Compliant Data Lake:** (e.g. Snowflake, BigQuery, or Azure Data Lake + custom schema)
\$1,500–\$10,000/month depending on scale
- **ETL Pipeline Development & Maintenance:** (e.g. Fivetran, Stitch, or custom scripts for ModMed & media sources)
\$500–\$5,000/month depending on scale
- **Identity Resolution Layer:** (Levo-built logic to match patients across intake and EMR)
Custom build cost based on ModMed structure and consent model
- **Dashboarding & Visualization:** (e.g. Looker, Power BI, custom front end)
\$500–\$2,000/month + dashboard dev costs
- **Ongoing Data Governance & QA:** (privacy, audit trails, access controls)
Ongoing hours + security protocols OCP Compliance Team

Estimated Resource Lift

- **Initial Build Window:** 60–90 days (data team + engineering + coordination with OCP IT/Compliance)
- **Ongoing Maintenance:** 10–20 hours/month minimum
- **Internal Collaboration Required:** Access to ModMed, form intake systems, and appointment scheduling workflows

Review & Assessment of Existing Practice Sites

Levo Health will begin this engagement by conducting a comprehensive review and technical assessment of the existing practice websites not currently managed by Levo Health. The purpose of this assessment is to identify gaps in performance, security, consistency, and user experience across the portfolio in order to inform redevelopment priorities and scope.

Practices in Scope:

Orthopedic Care Partners has identified the following websites for inclusion in this review:

- Tucson Orthopedic Institute
- Citrus Orthopaedic & Joint Institute
- Orthopedic Specialty Institute
- Veronica Diaz, MD
- Spine Care Partners
- The Steadman Clinic
- Motion Orthopaedics
- The Orthopaedic Partners
- The Orthopaedic Institute
- Orthopedic Care Partners

Scope of Work:

Levo Health will perform the following activities as part of this step:

- Audit WordPress versions, PHP environments, theme structures, and plugin stacks
- Review site performance, including load time, mobile responsiveness, and core web vitals
- Evaluate SEO readiness, metadata structure, and keyword baseline
- Analyze security posture, patch status, and update frequency
- Review accessibility and ADA compliance markers
- Assess content layout, user experience, and site structure
- Identify visual inconsistencies and branding misalignment
- Document availability of analytics tracking and reporting tools

Deliverables:

- A site-by-site evaluation report including findings, risk indicators, and actionable recommendations
- A prioritized roadmap for redevelopment or optimization, based on technical health, business impact, and urgency

This assessment will serve as the foundation for all subsequent development and design activities.

Project Management & Timeline Development

Following the completion of the site assessment phase, Levo Health will develop a detailed project management framework and timeline to guide the execution of website redevelopment and ongoing services. This step ensures alignment across stakeholders, resource planning, and phased deployment based on site readiness and organizational priorities.

Scope of Work:

Levo Health will perform the following activities as part of this step:

- Establish a centralized project management workspace (e.g., Asana) to manage all workstreams, tasks, and deliverables
- Define project milestones, dependencies, and timelines for each phase of the engagement
- Sequence site redevelopment based on technical complexity, business priority, and partner readiness
- Coordinate internal and external resources to support design, development, content, and QA workflows
- Conduct weekly project meetings with designated Orthopedic Care Partners' stakeholders to track progress, resolve blockers, and maintain alignment
- Provide ongoing reporting and documentation within the shared project environment

Deliverables:

- Project plan outlining key phases, timelines, and responsible parties
- Prioritized redevelopment schedule, informed by Step 1 findings
- Project tracking dashboard for real-time visibility into progress, open items, and approvals
- Weekly status reports and meeting summaries to ensure transparency and alignment

This structure will provide a clear and scalable framework to manage all future workstreams efficiently and with accountability across all involved practices.

Site Architecture & Usability Planning

Based on the findings from the initial assessment, Levo Health will develop a scalable site architecture strategy that ensures consistency, performance, and ease of management across Orthopedic Care Partners' network of practices. This phase is designed to balance centralized control with local flexibility, enabling each partner practice to maintain a distinct digital presence while leveraging a shared technical foundation.

Scope of Work:

Levo Health will evaluate and propose a WordPress multisite implementation as the foundation for future development. This framework will allow all partner sites to operate within a single network, supported by a standardized theme and plugin stack. Each site will retain the ability to customize brand elements, content, and local features while benefiting from unified backend management.

Key activities include:

- Define and document a shared site architecture model, including content hierarchy, layout modules, and user flows.
- Plan for the implementation of a WordPress multisite environment to support centralized control and efficient updates.
- Identify a standard library of vetted plugins and shared tools that will be deployed across all sites
- Design a flexible, reusable theme framework that accommodates visual differentiation while maintaining performance and consistency.
- Establish navigation patterns and conversion-focused layouts optimized for orthopedic patients and referring providers.
- Develop UX recommendations to ensure accessibility, mobile responsiveness, and ease of navigation for target users.

Deliverables

- Site architecture documentation and annotated sitemap
- Plugin and theme framework recommendation for multisite deployment
- Multisite management model outlining roles, access levels, and governance structure
- UX planning summary with key usability considerations for orthopedic practices

This planning phase ensures that all future development is aligned with Orthopedic Care Partners' infrastructure and business strategy, providing a foundation for efficient, scalable, and consistent digital experiences.

Initial SEO & Keyword Strategy Recommendations

As part of the early planning and development process, Levo Health will provide a set of foundational SEO and keyword strategy recommendations to improve visibility, search engine performance, and localized discoverability for each partner practice. The strategy will support both technical implementation and long-term growth efforts, tailored to the needs of orthopedic clinics and the unique attributes of each practice location.

Scope of Work:

Levo Health will conduct an initial SEO and keyword strategy review to inform site structure, page development, and content creation. This work will address both system-wide best practices for orthopedic-focused websites and localized needs based on market, services, and search intent.

Key activities include:

- Conduct baseline keyword research aligned to orthopedic service lines
- Identify high-value, locally relevant search terms and patient queries for each practice location
- Evaluate current metadata structure, URL formats, page titles, and on-page keyword usage
- Review existing content for optimization opportunities and gaps based on regional patient demand
- Provide guidance on schema markup, alt text, and ADA-compliant SEO structure
- Recommend keyword strategy by practice, including target terms, geographic modifiers, and content themes
- Develop best practices for ongoing local SEO optimization post-launch, including reviews, location data, and structured content

Deliverables

- SEO baseline and keyword summary for each website
- Metadata and on-page optimization checklist
- Practice-level keyword map with prioritized terms and geographic modifiers
- Guidelines for future content creation, local SEO maintenance, and optimization opportunities

This early SEO strategy will help ensure each practice is positioned to rank effectively in its market while supporting Orthopedic Care Partners' broader digital visibility goals.

Current Website Optimization

Before full redevelopment begins, Levo Health will identify and implement a set of high-impact optimizations across the existing practice websites. This work is intended to improve functionality, user experience, and data visibility in the near term, ensuring that each site performs as effectively as possible while long-term redesign efforts are underway.

Scope of Work:

Levo Health will review each active website to address immediate issues that may be affecting patient experience, engagement, or operational efficiency. These early adjustments will focus on improving visibility, conversion functionality, and performance tracking.

Key activities include:

- Ensure Google Analytics (GA4) is properly installed and configured across all sites
- Evaluate existing appointment request or scheduling tools and implement improvements where possible
- Review contact forms for functionality, accuracy, and responsiveness
- Identify and correct any broken links, outdated plug-ins, or rendering issues
- Confirm basic mobile responsiveness and make immediate layout fixes where needed
- Optimize key meta tags, page titles, and descriptions to support early SEO improvements
- Address any high-priority UX concerns that may disrupt access to essential content or services
- Recommend quick enhancements to CTAs, headers, or layout to improve clarity and engagement

Deliverables

- Quick optimization report with actions taken and next-step recommendations
- Updated tracking configuration with Google Analytics
- Adjustments to forms, navigation, or scheduling tools as appropriate
- Summary of immediate technical fixes implemented per site

This phase ensures that each practice website is functioning reliably and capturing essential data, even before full redevelopment begins.

Content Generation

As part of the initial website redevelopment, Levo Health will evaluate the existing content across each practice site and carry forward core messaging that remains accurate, compliant, and relevant. While this engagement does not include a full-scale content rewrite, Levo Health will identify critical gaps and recommend opportunities for improvement, ensuring each site is structurally sound and content-ready for long-term performance.

Scope of Work:

Content development will focus on refining and structuring existing messaging, with light enhancements as needed to support user experience, SEO alignment, and content hierarchy.

Key activities include:

- Audit of current site content for accuracy, readability, and alignment with updated site architecture
- Retention and formatting of existing content where appropriate
- Identification of missing or outdated sections that may impact usability or clarity
- Light content editing or augmentation to support page structure and flow
- Drafting of new content only where significant gaps exist, such as key service lines or physician bios
- Recommendations for future content expansion opportunities, including blog strategy, localization, and service-line landing pages
- Ensuring consistency in tone, layout, and content presentation across all sites
- Integration of metadata, H tags, and structured content to support long-term SEO strategy

Deliverables

- Structured content layout for each redesigned site, incorporating retained and lightly edited content
- New content drafted only where essential to usability or patient clarity
- A list of prioritized content opportunities for future development
- Content hierarchy aligned to SEO, usability, and mobile responsiveness best practices

Website Design & Development

Levo Health will lead the full redesign and development of each Orthopedic Care Partners' practice website, using a scalable, centralized framework that allows for flexibility at the individual practice level. The focus will be on improving usability, performance, and alignment with modern web standards, while ensuring each site is optimized for patients, referring providers, and internal stakeholders.

Scope of Work:

Each website will be redeveloped using a shared architecture and vetted theme system, while maintaining the ability to customize visual elements, content, and functionality per practice. Design and development will incorporate best practices for accessibility, mobile responsiveness, speed, and content engagement.

Key activities include:

- Create wireframes and high-fidelity UI mockups for key page templates
- Build site designs using approved UI elements, branding, and patient-first content hierarchy
- Develop WordPress-based websites on the agreed multisite or standardized CMS framework
- Implement mobile-responsive design standards across all layouts
- Code to meet ADA compliance and accessibility best practices
- Integrate scheduling tools, contact forms, and call-to-action components
- Configure analytics and SEO tracking infrastructure
- Conduct testing across major browsers and devices
- Lead user acceptance testing (UAT) and implement feedback prior to launch
- Launch each website following a structured go-live process, with minimal disruption to ongoing patient access
- Provide light training to designated staff on updating content, managing pages, and using built-in tools

Deliverables

- Approved design mockups and wireframes for each website
- Fully developed WordPress website on the shared platform
- Final QA checklist and UAT report
- Deployed live site with updated DNS and tracking configurations
- Training documentation and one training session per practice team

This phase ensures that every Orthopedic Care Partners' partner practice benefits from a modern, accessible, and scalable website that supports growth and simplifies ongoing management.



Real-Time Analytics & Campaign Metrics

Cloud-Based Marketing Dashboards

A real-time cloud-based marketing dashboard will be available for all campaign metrics. You can customize the tracked analytics and campaign metrics, or Levo Health can use standard campaign reporting metrics.

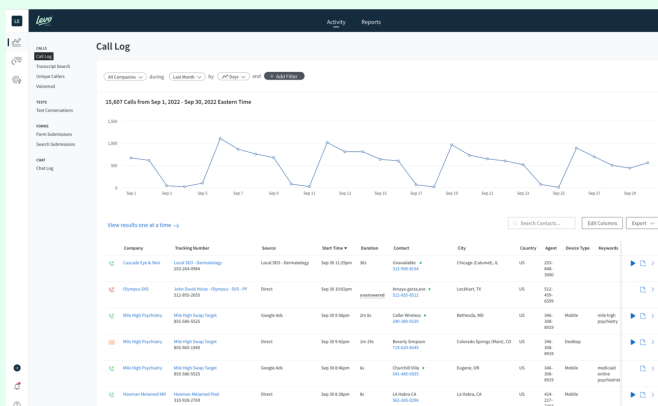
Available metrics will pull from available sources and will be used to provide ongoing changes to messaging, marketing allocation, and creative changes throughout the agreement. Levo Health can pull data from popular services like Google, Facebook, and Salesforce with over 100 integrations and 250+ metrics.

Marketing Attribution & Call Analytics

It is easy to determine which ads, campaigns, and keywords led to the most valuable clicks. But it can be tough to know which drove your most valuable calls. Bridging the gap between online and offline data, call attribution proves your real ROI. So, in addition to knowing which ad clicks led to conversions, you'll see which billboards, mailers, flyers, and brochures created customers.

Call Tracking uses dynamic number insertion (DNI) to keep track of online activity like PPC ads, emails, social media posts, and keywords. Source-level Tracking follows the calls from offline marketing pieces: ads, mailers, brochures, billboards, etc.

Marketing Attribution & Call Analytics



Online Call Tracking

- Google Ads PPC
- Yahoo & Bing PPC
- Organic Search Results
- Directory Websites
- Facebook Pages
- Web Referrals

Offline Call Tracking

- TV/Radio Commercials
- Print Ads
- Direct Mail
- Brochures
- Flyers & Brochures
- Billboards

Website Hosting & Management

Levo Health will provide secure, enterprise-grade hosting and ongoing website management for each practice website within the Orthopedic Care Partners' network. All sites will be hosted within a centralized environment, ensuring consistency, security, and ease of administration.

Scope of Work:

Hosting and management services will include:

- Centralized hosting for all practice websites
- 99.999% uptime (excluding scheduled or approved maintenance)
- Daily website backups, archived for a minimum of six months
- Real-time uptime and performance monitoring
- 24/7 login activity tracking with logs retained for 30 days
- Regular plugin and WordPress core updates
- PHP version management and compatibility checks
- Critical security patches applied within 24 hours of release
- High and important severity patches applied within 48 hours
- Technical support for hosting-related issues
- Coordination with Orthopedic Care Partners on annual security risk assessments

Deliverables

- Centralized, compliant hosting environment
- Ongoing website performance monitoring and issue resolution
- Daily backups with a 6-month archive
- Scheduled platform, plugin, and security updates
- Access logging and monitoring documentation
- Technical support aligned with uptime and patching SLAs

This approach ensures that Orthopedic Care Partners' websites are hosted securely, remain fully functional, and meet ongoing performance and compliance requirements.

Training for Practice Managers and Staff

While Levo Health will manage the majority of ongoing website updates and maintenance, select staff at each practice may require basic access to make minor changes to site content. To support this, Levo Health will provide lightweight training and clear standard operating procedures (SOPs) that empower practice managers to perform safe, limited updates without compromising site stability or structure.

Scope of Work:

Levo Health will equip designated staff members with the necessary tools and knowledge to manage simple text-based updates and operational content changes, while maintaining centralized control over technical functions and the overall site integrity.

Key activities include:

- Provide content editor access to selected staff through a permission-limited user role within the CMS
- Configure safeguards to prevent structural changes or access to critical site settings
- Develop basic SOPs for common updates (e.g., provider bio edits, office hour updates, image swaps)
- Offer one brief training session per site (live or recorded) to walk through safe content management tasks
- Provide email-based support for content-related questions or issues
- Reinforce that all technical, design, or security-related changes will continue to be handled exclusively by Levo Health

Deliverables

- User-level access setup for designated content editors
- Written SOPs for basic content editing tasks
- One live or recorded training session per practice, post-launch
- Ongoing support for content-related requests within the scope of maintenance services

This approach ensures that practice staff can make necessary updates when needed, while Levo Health maintains full control over the technical and structural integrity of the site environment.



Content Generation

A patient's journey is a series of questions that require thoughtful, well-timed answers. Crafting relevant content that reflects the patient's intent, care needs, and search behavior is essential for building trust and driving engagement. Levo Health uses a combination of AI-assisted tools and human copywriter oversight to produce high-quality, accurate content at scale. Our team generates meaningful, patient-focused material that supports search visibility, brand credibility, and clinical conversion across Orthopedic Care Partners.

Blog Content Generation

Levo Health will deliver monthly 500-word SEO-optimized articles focused on service lines, procedures, seasonal demand, and trending search topics. We use AI tools to accelerate topic ideation and outline generation, but all content is written and reviewed by experienced healthcare copywriters. If additional blog posts are required, we can adjust retained hours or recommend supplemental support.

Newsletters & Email Campaigns Content Generation

Email continues to deliver exceptional ROI when paired with clear strategy and strong copy. Our copywriters, supported by AI-assisted testing and optimization tools, will collaborate with our design team to produce engaging email content that aligns with the campaigns outlined in the Customer Journey and Marketing Automation sections.

Website & Landing Page Content Generation

Website content serves as the digital front door for each practice. Levo Health will craft original, conversion-optimized copy for service lines, physician bios, conditions, and procedures. While AI may support keyword structuring or layout testing, all site content is created and QA'd by our healthcare-focused writing team to ensure clinical accuracy, brand tone, and SEO alignment.

General Patient-Facing Content Generation

Beyond digital channels, Levo Health will produce educational materials tailored to Orthopedic Care Partners' patient populations. This includes brochures, in-office signage, print assets, and condition-specific handouts. Our copywriters may use AI tools for versioning or reading-level adjustments, but all final content is manually reviewed and formatted for compliance, clarity, and patient comprehension.

Templated Website Estimate

To streamline onboarding for new Orthopedic Care Partners' acquisitions, Levo Health offers a standardized, templated website solution.

This model allows for rapid deployment of a fully branded, secure, and user-friendly website that aligns with Orthopedic Care Partners' digital standards. Each site is built to scale and includes core functionality, SEO-readiness, and backend flexibility to support future growth.

This offering ensures consistency across the network while reducing time to launch, minimizing resource strain, and keeping costs predictable.

Deliverables

- **Discovery and Site Planning** – We begin by reviewing any existing web presence, collecting available content and brand assets, and identifying core functionality required for the new site. Our team will help map content to a templated structure and determine what can be reused, edited, or created from scratch.
- **Design and Development** – Each website is built using a Orthopedic Care Partners-approved design system that allows for flexibility in layout, color, and imagery while maintaining a consistent user experience across the network. We configure the site to include essential pages for services, provider bios, and locations, ensuring the experience is mobile-responsive, accessible, and easy to navigate.
- **SEO and Analytics Setup** – All templated websites include structured on-page SEO, including metadata, alt tags, and schema markup for services and providers. Google Analytics and tracking tools are configured at launch to monitor traffic, engagement, and performance over time. Local optimization is included where applicable.
- **Launch Support** – We manage the full launch process, including site QA, domain connection, redirects (if needed), and post-launch testing. A basic CMS training session and SOP documentation are included so designated staff can make simple updates. One round of refinements is included post-launch to ensure everything functions smoothly.

Cost & Time Estimate

- Templated Website Package: \$5,000 to \$7,500
- Final pricing based on complexity, number of pages, and available assets
- Timeline: 5 to 6 weeks from approved scope (depending on complexity)

Global Monthly Retainer

Flexible Retainer Structure with Long-Term Value

Levo Health has continued to honor its original 2019 hourly rate for Orthopedic Care Partners, a 63% reduction from current agency market rates, which typically range from \$275 to \$100 per hour. This preferred pricing now extends across the full OCP network. Under the new model, OCP will have 200 shared hours per month to apply across strategic, creative, technical, and digital workstreams. These hours are flexible and can be adjusted as priorities shift.

Monthly Retainer: \$20,000/month – 200 hours/month

This replaces the previous 250-hour model, reflecting a scaled-back scope and a shift from decentralized execution to enterprise-wide alignment. Levo Health remains focused on ensuring every hour delivers measurable value.

Project Prioritization and Collaboration Framework

To ensure the most efficient use of time, Levo Health will work closely with Shannon Gallagher and OCP leadership through a structured, agile planning model:

- **Weekly Syncs:** Review priorities, progress, and upcoming tasks.
- **Shared Project Tracker:** Maintain visibility into workstreams, timelines, and hour usage.
- **Impact-Driven Prioritization:** Focus efforts based on urgency, scope, and cross-practice value.
- **Rolling Planning Model:** Evaluate and adjust priorities as new needs emerge.
- **Transparent Reporting:** Weekly tracking with monthly summaries for full clarity.

This framework ensures alignment, responsiveness, and efficient execution across the network.

Special Projects Outside the Retainer

In addition to the monthly retainer, Levo Health supports one-time and high-impact special projects that fall outside of standard scope. These efforts are scoped separately and quoted based on complexity, timeline, and resource requirements.

Examples include:

- New practice onboarding, market launches, or website projects
- Future ModMed integrations or software development
- Closed-loop attribution system buildout

Each special project will be defined through a formal scope of work with a clear timeline, deliverables, and cost estimate. This allows OCP to pursue focused initiatives without compromising retainer bandwidth or strategic continuity.

Tier 1

Tier 1 includes everything needed to redesign and relaunch a modern, user-friendly, and fully managed website for each Orthopedic Care Partners' practices. This tier is built for practices that require a reliable, professionally managed web presence without ongoing content marketing or advertising support. All foundational technical work, UX planning, and training are included.

Ideal For:

Practices looking for a turnkey, high-performing website that's fully managed but not actively updated with new content or promotional campaigns. Tier 1 ensures every practice has a compliant, patient-friendly site that meets today's standards, without the overhead of content or marketing services.

What's Included in Tier 1:

- **Site Review & Assessment:** Each practice's existing website is audited for technical performance, design, security, accessibility, and content gaps to inform redevelopment priorities.
- **Site Architecture & UX Planning:** We design a scalable, multisite-compatible framework that balances consistency with local flexibility, optimized for orthopedic patients and referring providers
- **Website Design & Development:** Custom-designed, mobile-responsive WordPress sites developed on a shared theme system to ensure ease of maintenance, performance, and ADA compliance.
- **Initial SEO & Keyword Strategy:** Each site is built with SEO in mind, including keyword mapping, metadata planning, and on-page structure optimized for both local and orthopedic-specific search.
- **Real-Time Analytics and Tracking Setup:** Google Analytics and other performance tracking tools are configured for each site, providing clear insight into traffic, engagement, and user behavior.
- **Current Website Optimization:** High-priority fixes (form functionality, mobile layout, outdated content) are made during early stages to improve site performance while redevelopment is underway.
- **Hosting & Technical Management:** All sites are hosted on a centralized InMotion Hosting environment, with daily backups, 99.999% uptime, security patching, and plugin management.
- **Practice Manager Training:** Light training is provided for designated staff, including CMS access to manage basic updates, as well as SOPs for edits, image uploads, and minor content changes.

Costs: One-Time Website Development Cost (based on website pricing assumptions)

Ongoing Support & Communication: While Tier 1 does not include ongoing SEO or content development, Orthopedic Care Partners' core maintenance retainer (outlined separately) provides centralized support for updates, edits, plugin maintenance, and coordination. All work is tracked in a shared project management system.

Tier 2

Tier 2 includes all the foundational services from Tier 1, with the addition of ongoing SEO and reputation management. This tier is built for practices looking to actively improve their visibility in search results and maintain a strong online reputation. With proactive search optimization and structured review monitoring, Tier 2 ensures each practice's web presence continues to grow and stay competitive over time.

Ideal For:

Practices in competitive markets that want to improve their presence in search results, build trust through positive online reviews, and maintain visibility over time. Tier 2 is a strong fit for clinics that don't need monthly content but want to rank higher and look better online.

What's Included in Tier 2:

- **Everything in Tier 1, plus:**
- **Ongoing On-Site SEO:** Monthly updates and refinements to ensure the website continues to rank for relevant orthopedic and local terms. This includes optimizing metadata, improving page structure, refining internal linking, and monitoring keyword performance.
- **Local SEO (Location-Based Optimization):** We identify and correct old, missing, or duplicate listings across every digital directory tied to your providers and locations. We enrich listings with photos, service descriptions, hours, accepted insurance, and more, eliminating conflicts and giving search engines (and patients) the data they need to prioritize your practice. This work enhances search visibility and reduces friction on the scheduling path.
- **Online Reputation Management:** We implement a proactive strategy to gather, monitor, and respond to patient reviews across major platforms. By leveraging both in-clinic and post-visit feedback mechanisms, we ensure you're continuously generating real, timely patient experiences that support trust. Our team works with you to build internal workflows, elevate positive reviews, and mitigate issues before they escalate.

Costs: One-Time Website Development Cost (based on website pricing assumptions)

- + **Local SEO:** \$60 per location or provider/month
- + **Reputation Management:** \$75 per location or provider/month
- + **Starter Ongoing SEO Support:** \$875/month (up to 5 monthly hours)

Ongoing Support & Communication: Up to 5 hours per month are allocated to support SEO, listing optimization, and reputation management. This includes technical updates, coordination with directory platforms, strategy review, and feedback reporting. Additional hours may be approved as needed or rolled into a full retainer.

Tier 2



Ongoing On-Site SEO

Acquire patients at the right time, every time. Give search engines and your patients, members, and consumers the information they need to choose you in search.

Modern SEO goes beyond attracting traffic; it focuses on drawing in highly relevant, targeted visitors. In a competitive market, effective SEO strategies are crucial, as millions depend on search engines daily to find answers and solutions. Levo Health offers comprehensive SEO optimization and support, covering every aspect needed to keep each of Orthopedic Care Partners' practices visible and relevant.

Our SEO services include:

- **Monthly Campaign Reporting:** We provide a dedicated SEO dashboard with insights into top-ranking keywords, long-tail search terms, ranking shifts, organic site visits, and keyword-driven conversions. This allows for ongoing strategy refinement and visibility into performance.
- **Keyword Optimization:** We identify high-performing and emerging keywords specific to orthopedic and local patient behavior. We also provide recommendations for new copy and adjustments to existing content to better align with what patients are searching for.
- **Content Strategy Integration:** We identify opportunities to create or expand service line pages, provider FAQs, or localized content that supports ongoing SEO. These insights are passed directly into content development workflows.
- **Internal Linking Improvements:** We strengthen internal page-to-page navigation to guide users toward high-priority services and improve how search engines understand content hierarchy.
- **Medical SEO & Structured Data:** We implement schema markup for medical services, conditions, treatments, and providers to help search engines better understand and prioritize your content. This includes tagging content for rich snippets and improving visibility for searches like "knee replacement near me" or "spine surgeon accepting UHC."
- **Technical SEO & Performance Optimizations:** Our team performs regular audits to fix crawl errors, broken links, duplicate content, and page speed issues. We ensure each site loads quickly, functions on mobile devices, and meets Google's evolving best practices.

By implementing this layered SEO strategy, Levo Health ensures that each Orthopedic Care Partners practices continues to rank well, attract qualified traffic, and support long-term patient acquisition goals.

Tier 2



Local SEO (Location-Based Optimization)

Acquire patients at the right time, every time. Give search engines and your patients, members, and consumers the information they need to choose you in search.

Most physician offices the size of Orthopedic Care Partners are bound to have old, missing, inaccurate, or duplicative listings for each location and its current and past physicians. These errors can lead to patient confusion and frustration, not to mention a reduction in page ranking and SEO scores.

A recent analysis of 1,800 physicians and 15,000 healthcare facilities across the US showed:

- Nearly one-third (31.5%) lacked an online, local listing. That's 3.6x greater than the unlisted percentage of other businesses (8.68%)
- Of the listed healthcare facilities, 48% had basic address errors that result in misdirected patients
- 29% of healthcare facilities were also missing accurate phone numbers

LH will begin by searching and creating a comprehensive list of all digital listings associated with the practice and its physicians. Once the list is completed, LH will work with your internal team to secure access to each property, verify the account information and ensure that each listing is optimized with images, descriptions, hours of operations, accepted insurances, and other important information. This task is ongoing and will be actively managed throughout the relationship.

The overall goals of optimized listings are:

- Improve the patient experience with accurate location data online, all the time, across desktop and mobile devices.
- Attract and retain more patients with a seamless journey from local search to appointment.
- Save time and money by eliminating the internal inefficiencies caused by location data conflicts.
- Ensure physician specialties, contact information, and facility affiliations are up-to-date.
- Eliminate redundant location data that hinders local search performance.

Tier 2



Online Reputation Management

Humanize the care process with real people, highlighting real results.

Building and managing a patient satisfaction and testimonial program is crucial for Orthopedic Care Partners, enhancing trust and credibility with patients at every stage of their journey. Today's patients seek authentic feedback, often valuing real experiences over traditional marketing messages.

Levo Health will implement a system to request and gather testimonials both in-clinic and post-discharge, ensuring that Orthopedic Care Partners captures timely, relevant feedback. In-clinic reviews allow patients to share their immediate impressions while their experience is still fresh, providing insights into the quality of care and environment. Post-visit follow-ups enable patients to reflect on their progress, health journey, and the impact Orthopedic Care Partners has had on their lives, sharing powerful, lasting testimonials that resonate with others considering treatment.

By securing testimonials across these stages, Orthopedic Care Partners can showcase genuine patient experiences, addressing diverse concerns and building a foundation of trust for prospective patients.

How Social Proof Shapes Consumer Decisions

Social proof is a psychological phenomenon where people conform to the actions of others under the assumption that those actions reflect the correct behavior. It doesn't matter if that social proof comes from friends or strangers. What matters is that they see evidence from their peers – in this context, other consumers – that the decision they're about to make is the right one.

Levo Health will identify potential patients willing to explain how Orthopedic Care Partners has helped them in their own words. As part of our scope, Levo Health will create and syndicate any written and filmed patient testimonials or reviews across social media channels, blogs, and websites to quickly establish an emotional/value-based connection with your target audience.

In a recent survey, **45% of patients use online reviews** to seek out quality of care information over patient rating scores, wait times, demographics, and photos of the practice.

Tier 3

Tier 3 includes everything in Tiers 1 and 2, with the addition of a structured monthly content development program. This tier is designed for practices that want to expand their organic reach, deepen their authority around key conditions or services, and consistently publish high-quality, search-optimized content. With ongoing blog writing, SEO-focused page creation, and strategic topic planning, Tier 3 supports long-term growth through relevant, localized, and patient-focused content.

Ideal For:

Practices or regions with growth goals that rely on search traffic, educational outreach, or competitive positioning around high-value service lines. Tier 3 is best suited for clinics that want to stay visible, answer patient questions before the first appointment, and build lasting SEO value through consistent content.

What's Included in Tier 3:

- **Everything in Tier 1 & 2, plus:**
- **Monthly Content Development:** Each month, Levo Health will research, write, and deliver original content designed to support SEO goals and engage patients. Content may include educational blog posts, condition-specific pages, or location-based landing pages depending on what will drive the highest impact.
- **Topic Strategy & Content Planning:** We'll build a forward-looking editorial plan based on keyword trends, seasonal demand, and patient search behavior. This ensures that every article or page is created with purpose and tied directly to what patients are actively seeking online.
- **Content Optimization & Publishing:** All content is formatted for on-page SEO and integrated into the practice website, including optimized titles, headers, internal linking, and schema markup where relevant.
- **Reporting & Content Performance Insights:** We track how content is performing through organic traffic trends, engagement metrics, and keyword lift. This data is used to inform future content decisions and identify opportunities for deeper content expansion.

Costs: One-Time Website Development Cost (based on website pricing assumptions)

+ **Local SEO:** \$60 per location or provider/month

+ **Reputation Management:** \$75 per location or provider/month

+ **Starter Ongoing SEO Support:** \$875/month (up to 5 monthly hours)

+ **Content Development:** \$700/month (up to 4 monthly hours; includes 1–2 blogs)

Ongoing Support & Communication: Tier 3 includes up to 4 hours per month of content writing, editing, and publishing. This typically supports one to two blog posts or SEO landing pages each month, along with related content management and performance analysis.

Tier 3



Content Development

A patient's journey begins with questions. Levo Health's content generation services are designed to answer those questions clearly and effectively. From blog articles to condition-specific landing pages and in-clinic materials, our content supports patient education, search visibility, and long-term engagement. Every asset is created with purpose, optimized for performance, and written for the unique needs of Orthopedic Care Partners' practices.

Monthly Blog Content: Levo Health will provide SEO-optimized blog posts each month per participating Tier 3 practice. Each article is tailored to search trends and patient needs, typically 500 words in length, and aligned with high-intent keywords and seasonal topics.

Website and Landing Page Copywriting: We develop original content for service line pages, provider bios, condition overviews, and location landing pages. This supports both patient understanding and improved search engine performance.

Editorial Planning and Topic Strategy: Each participating practice will receive an editorial calendar built from keyword research, market trends, and common patient questions. Topics are prioritized based on impact, timing, and strategic alignment with core services.

Content Optimization and On-Site Publishing: All content is formatted for on-page SEO, including titles, metadata, headers, and internal links. Our team publishes directly to each website, ensuring content is both discoverable and visually consistent.

General Patient-Facing Content: We also develop educational brochures, one-pagers, and in-clinic display content when needed. These pieces are written to extend the patient experience beyond the website and improve retention and clarity at the point of care.

Email and Newsletter Content: For clients leveraging marketing automation or direct outreach, Levo Health will provide email copywriting support to nurture leads, educate patients, and keep audiences engaged.



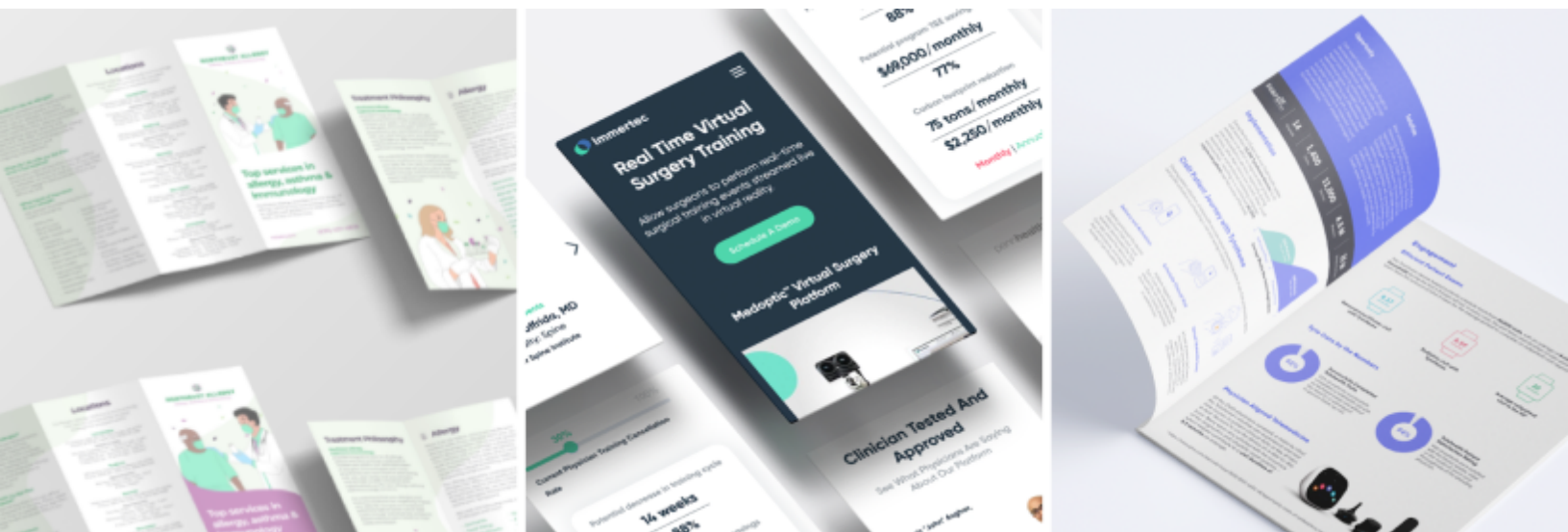
Creative Services

The perception of Orthopedic Care Partners by potential customers is vital. Consistently representing your brand across all print and digital mediums signifies a commitment to detail and quality control – key attributes that potential patients seek in their healthcare providers.

Levo Health aims to establish uniformity in all marketing facets, including advertising materials, collateral, social media imagery, and other creative aspects of campaigns, both for internal and external use. This standardization is essential in reinforcing a coherent and professional brand image that resonates with your audience.

Some examples of collateral development include:

- Company Overview Brochures
- Sales & Information Sheets
- Animation & Illustration
- New Patient Packets
- Digital Ad Creative
- Social Media & Digital Content
- Condition & Treatment Information
- PowerPoint Slides, Presentations, and Case Studies
- Video Testimonial/Success Stories
- Letterhead, Business Cards, etc.
- Newsletters, Announcements, Signage, etc.





Brand Discovery & Brand Audit

A brand is not your logo, tagline, product, or service. While these things can be expressions of your brand, they are not your brand.

Here's the simplest way we at Levo Health define a brand: Branding is about the promise of a distinct, memorable experience. It's about creating an expectation and delivering it consistently every time a patient comes into contact with Orthopedic Care Partners, whether it's how your website looks and functions, your customer service process, or how your staff makes the patient feel during and after the care/treatment process.

It's how Orthopedic Care Partners makes your patients feel about themselves and their decisions when interacting with your brand. It's why these patients choose Practice A vs. Practice Clinic B, even if the clinics may have similar services, pricing, or availability.

Brand Discovery

The first step involves our team getting to know you and your company. This involves meeting with your team, conducting research, and drilling down to the core of how you want patients to see your brand moving forward.

This will allow Levo Health to determine the order in which to begin the creative aspects of this proposal, namely, logo design, brand standards manual, and website design and development.

Brand Audit

During the second phase, Levo Health will identify what your brand stands for, who you are as a company, and what you need to do from a communications standpoint to fix internal problems or issues. Then, an extensive brand audit should start within.

The following outlines the internal brand areas that will be explored during this phase:

- Positioning
- Brand Values
- Unique Selling Proposition (USP), the brand promise, or brand essence
- Voice
- Culture
- Product / Service positioning



Brand Strategy & Positioning

Brand Strategy

After completing the discovery phase, Levo Health will create a tailored brand strategy focusing on your primary services. We will then define the core promise your brand needs to communicate. Following this, we will recommend and implement strategies to convey this message effectively across your business operations and target market.

There are four main types of brand strategies:

- Line Extension
- Brand Extension
- New Brand Strategy
- Flanker/Fight Brand Strategy

Brand Positioning

Once Levo Health has developed your brand strategy and you've approved this direction, Levo Health's team begins working on campaigns to differentiate Orthopedic Care Partners from its competitors and align your current and future brands and sub-brands.

Your brand positioning will be designed to be fairly enduring, as a brand positioning should change over time to reflect changes in the marketplace, including new competitors, new technological advances, and new benefits sought by patients seeking care offerings throughout a wide radius around Orthopedic Care Partners's current and future locations.

- Understanding what your community wants
- Understand what Orthopedic Care Partners's brand capabilities are
- Understand how each competitor is positioning their brand

Levo Health will then craft and launch a brand positioning strategy that:

1. Will resonate with your community
2. Can be delivered by your company (capabilities)
3. That is different from your competitors



Identity Design & Development

After the brand strategy is set and approved, Levo Health's design team will begin translating your brand's characteristics into compelling visual elements. In the healthcare sector, a strong brand is more than just a logo or color scheme; it reflects your company's reputation, values, and the quality of care you provide.

A robust brand fosters trust, credibility, and loyalty, not just among patients but across all consumer segments. It sets your company apart from competitors and ensures a consistent, reassuring message, which is essential for patient retention and long-term success. The complexity of healthcare branding lies in navigating regulatory frameworks while still resonating with your audience. At Levo Health, we understand that your brand is shaped by the community and patients you serve. Your branding, therefore, must be intimately connected with the needs and aspirations of your primary users.

Levo Health specializes in crafting visual narratives and experiences that resonate across various marketing and media channels, creating a unified and impactful brand presence.

Effective branding is crucial in any industry, but in healthcare, it's indispensable. The choices people make about their health are deeply personal and significant. A healthcare brand's foremost role is to establish trust. Without it, making informed health decisions is challenging, if not impossible. Levo Health is dedicated to building this trust through thoughtful, patient-centric branding strategies.

Here's a formula that helps us understand how consumer relationships work.

Brand Promise + Brand Experience = Relationship.

This equation highlights the importance of initial perceptions and the actual experience with your service or product. The way potential customers perceive your brand before they engage with you is equally crucial as their direct interactions and experiences. Your brand is not just a part of your business; it is the essence of it. Execute it with precision and care for lasting impact.

A standard identity package includes, however, is not limited to:

- Logo design
- Tagline creation
- Identity system including icons, color palettes, collateral, stationery, and business cards
- Brand standards manual
- Environmental Signage



Identity Design & Development

If directed, Levo Health's goal is to craft a logo and brand identity that resonates with your target audience and encapsulates the essence of Orthopedic Care Partners. We aim to create a visual identity that is not just seen but felt, conveying trust, professionalism, and compassion in every aspect.

Phase 1: Understanding the Client and Their Patients

- **Client Discovery:** We begin with in-depth discussions to understand your healthcare company's mission, values, and ethos. This foundational step is crucial for creating a logo that genuinely represents your brand's essence.
- **Patient Demographics Analysis:** Understanding your target patient demographic is key. We analyze patient needs, preferences, and expectations to ensure the logo design aligns with their perception and values.
- **Market Research and Competitor Analysis:** Our team conducts thorough market research and analyzes competitors to understand current trends, identify gaps, and differentiate your brand effectively in the healthcare market.

Phase 2: Iterative Logo Design Process

- **Initial Sketches and Concepts:** The design process starts with conceptual sketches, exploring ideas visually representing your brand's values and mission.
- **Design Element Exploration:** We explore various design elements, including color palettes, typography, and imagery. This phase is dedicated to finding the right visual language that speaks to both the brand and its patients.
- **Style and Theme Development:** Based on the initial concepts, we develop a few coherent style themes that reflect different aspects of your brand personality and patient demographics.

Phase 3: Rounds of Client Review and Feedback

- **Presentation and Review Sessions:** We present the developed themes to you, detailing the rationale behind each concept. This phase involves active client participation, where your feedback is integral.
- **Feedback Integration and Refinement:** Following each review, we integrate your feedback and refine the designs. This iterative process ensures the logo evolves in alignment with your vision and patient expectations.
- **Finalization of Concept:** After several rounds of feedback and refinements, we narrow down to the final concept that best represents your brand.



Brand Standards Manual

A brand standards manual, also known as a brand style guide, is a comprehensive document that outlines the specific guidelines for maintaining brand consistency across all forms of communication. It serves as the authoritative source for all brand-related visual and verbal expressions, ensuring that the brand is represented consistently and effectively in every interaction.

Key Components of a Brand Standards Manual

Typically, a brand standards manual includes:

- **Logo Usage:** Guidelines on how to use the logo, including size, spacing, and acceptable variation.
- **Color Palette:** Specific color codes and usage instructions for maintaining visual consistency.
- **Typography:** Details about typefaces, font sizes, and styles for both print and digital media.
- **Imagery and Graphic Elements:** Direction on the style and tone of photography, illustrations, and other graphic element.
- **Brand Voice and Tone:** Guidelines on the brand's writing style and tone to ensure consistent messaging.
- **Application Examples:** Examples of how to apply these guidelines in different contexts, such as business cards, marketing materials, and digital platforms.

Usage of a Brand Standards Manual

The brand standards manual is used by:

- **Marketing Teams:** To create consistent marketing materials and campaign.
- **Designers and Creatives:** As a reference for designing any brand-related material.
- **External Vendors and Partners:** To ensure that third-party creations align with the brand identity.
- **New Employees:** For orientation and understanding the brand's visual and verbal identity.

A brand standards manual guides the visual and verbal representation of the brand and also serves as a strategic asset in building a strong, cohesive, and recognizable brand identity. By providing a brand standards manual, Levo Health ensures that the Orthopedic Care Partners's brand is well-positioned for consistent and effective communication across all touchpoints.

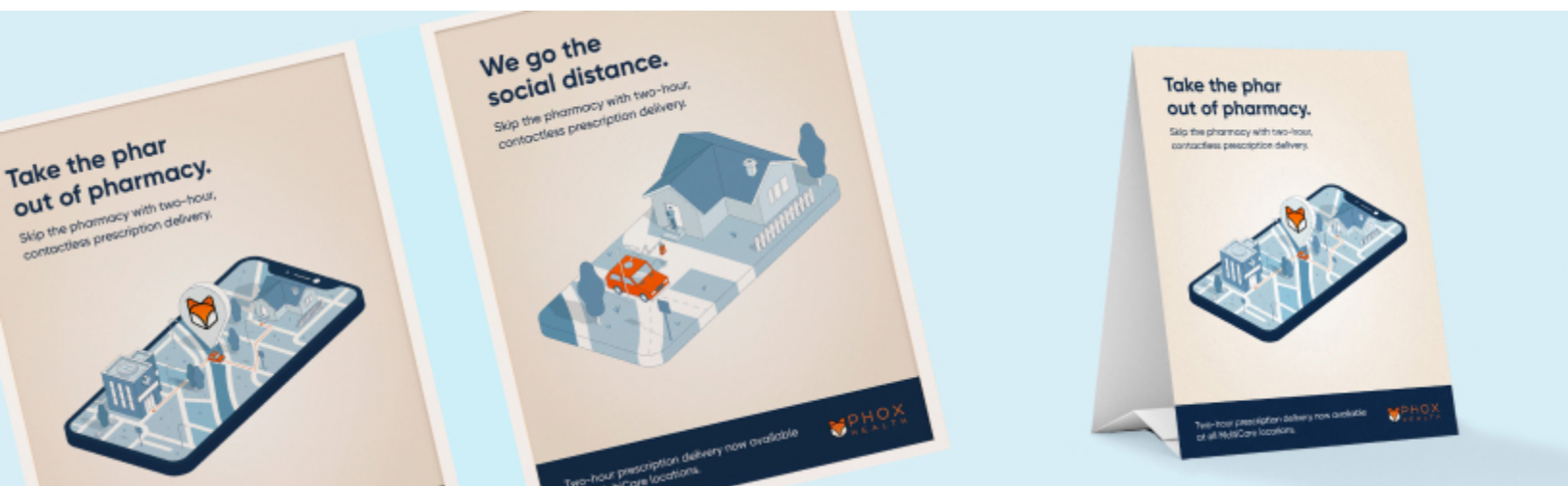


Identity System

The foundation of a strong brand identity in healthcare lies in creating a visual language that is consistent, memorable, and reflective of the company's values and mission. Our proposal focuses on developing a comprehensive branding suite that includes a logo, custom icons, patterns, and other branding elements, ensuring they harmoniously work across all mediums.

Your logo, as the centerpiece of your brand, will be prominently featured on all major platforms including your website, marketing materials, business stationery, and signage.

- **Digital and Print Materials:** Custom icons will be used in digital interfaces such as your website and mobile app, as well as in printed brochures and informational materials to represent services, features, or concepts unique to Orthopedic Care Partners.
- **Background Elements:** Custom patterns and textures will be used as background elements in both digital and print mediums. This could include website banners, cover pages of reports, and marketing collateral.
- **Print and Digital Collateral:** Business cards, letterheads, email signatures, and social media profiles will all be designed to align with the new brand identity.
- **Promotional Items:** Branded merchandise like pens, notebooks, and bags will carry the logo and brand elements, serving as tools for brand promotion and patient engagement.
- **Staff Uniforms and Name Badges:** Staff attire and badges will incorporate the brand elements, fostering a professional and unified look.





Landing Page Design & Development

Landing pages are critical to your first impression with your future customers. A landing page's sole purpose is to get that potential customer to take action.

Levo Health will create purposefully crafted landing pages tailored to specific conditions, target audiences, or types of treatments. These pages will be designed with effective conversion tactics and strategically placed calls-to-action. We will integrate "smart" landing pages with CRM and CallRail systems, ensuring seamless API compatibility with other third-party software. Additionally, Levo Health will implement call tracking, heat mapping, and advanced analytical tools to optimize and reduce the cost per acquisition if you choose to pay for the enhanced reporting software.

To maximize conversion rates, Levo Health will incorporate the following:

- **Attribution Models:** By integrating multiple ad networks by drop-in pixel tracking, the landing pages will seamlessly integrate all analytics tools to understand what keyword, keyword group, or marketing channel is driving each conversion.
- **A/B Testing:** Segmenting traffic through A/B testing will provide valuable insight into visitor behavior to maximize conversion rates.
- **Heatmapping, User Screen Recording, and Analytics:** Install best-in-class marketing software to track from anonymous IP addresses to known patient records. Analytic reporting will go beyond Google Analytics and Webmaster Tools.
- **Social Proof:** Social proof is powerful and should be prevalent throughout the landing pages. Showing potential patients how Orthopedic Care Partners has helped others can reassure them that your practice group is the right choice.
- **Audience & Campaign Integrations:** All landing pages will be built to pass along unique advertising & customer data to allow Levo Health the ability to determine which keyword, keyword groups, or audience segments are most likely to generate not only appointments but treatment.
- **Cross-Browser & Mobile Testing:** Testing website among all common browsers and devices for any compatibility issues.
- **Contact Form Testing:** Testing all contact forms for functionality, accuracy, and reliability. In addition, all contact forms will be integrated to work with various marketing automation tools to ensure timely and personalized follow-up.
- **AMP Landing Pages:** On average, AMP pages load in .5 seconds. Levo Health will run AMP versions of each landing page to capture mobile landing page traffic.



Review & Build Audience Personas

In today's evolving healthcare environment, patient-centricity is paramount. Recognizing patient engagement as a key component in crafting more impactful marketing strategies is essential. Fundamentally, patient engagement is not just about enhancing outcomes; it encompasses a comprehensive approach involving tools, processes, and relationships that equip patients to make well-informed decisions and engage actively in their healthcare journey.

To effectively connect with a patient demographic that is increasingly informed, confident, and empowered, it's crucial to explore innovative and more impactful engagement methods. This involves understanding their needs, preferences, and behaviors and tailoring communication strategies that resonate with them on a personal level. By doing so, healthcare providers and marketers can foster a deeper, more meaningful connection with their patients, ultimately leading to improved health outcomes and patient satisfaction.

Data-Driven Decision Making

Before engaging in integrated direct-to-patient marketing and lead generation campaigns, Levo Health needs to know as much about your past and current patient base as possible. This includes what kind of habits they have on social media and elsewhere online.

This information will help us understand the types of content people engage with, at what time of the day and week they're most active, and what creative they're most likely to click through to read.

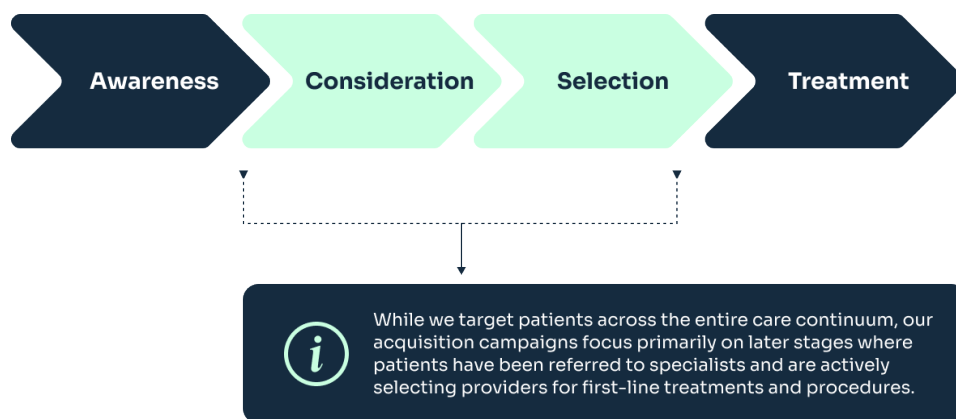
- **Custom:** Using sourced and purchased lists, Levo Health will upload phone numbers, email addresses, unique user IDs, and app user IDs. That information will then be matched to as many user profiles as possible.
- **Lookalike:** Using existing user data, Levo Health can find similar users to open up a new set of potential patients seeking out the services offered by Orthopedic Care Partners.
- **Location:** This is important for a business with a wide footprint, like Orthopedic Care Partners, this is important; ad messaging will target specific neighborhoods, towns, cities, and counties most likely to require your services.
- **Age, Gender, and Language:** Refining the age, gender, and language of the consumer is important to ensure a positive return on lead generation.
- **Detailed Targeting:** Levo Health creates this type of targeted audience to find potential patients based on demographics, interests, behaviors, and other categories like purchasing behaviors, socioeconomic status, household income, travel habits, etc.



Targeting Patients at The Right Time

Patients considering nephrology care often encounter a complex landscape of healthcare options and information, highlighting the need for personalized, comprehensive guidance to make informed decisions about their chronic and preventive care needs.

A Pew Research study underscores this trend, revealing that **over 70% of patients begin their healthcare journey online**. Traditional marketing strategies alone are insufficient for engaging these 'late stage' patients who are in the critical phases of Consideration and Selection.



Levo Health excels in reaching this specific patient demographic. Our approach integrates advanced digital strategies with a deep understanding of the patient care continuum. Recognizing the importance of each phase in the patient journey, Levo Health places a particular emphasis on the Consideration and Selection stages.

Empowering Patients in Their Decision-Making Journey

These stages are crucial because patients actively seek solutions and make informed choices about their healthcare options. Effectively engaging patients during these phases ensures they receive the information they need and maximizes the likelihood of a higher return for healthcare providers.

Levo Health's strategy involves crafting tailored content and utilizing precision targeting to connect with patients precisely when they are most receptive. Focusing on the entire patient care continuum, we can ensure a seamless and informative experience that guides patients through their decision-making process. This comprehensive approach demonstrates why it's not just about reaching patients, but about reaching them at the right time with the right information.



Integrated Marketing Campaigns & Media Buying

Patients increasingly start their healthcare searches online, exploring symptoms and treatment options. Levo Health leverages this trend by combining digital and traditional marketing to target these individuals. Our approach involves engaging, educating, and guiding potential patients to Orthopedic Care Partners. Levo Health will intercept these people to help nurture, engage, and convert customers seeking the services provided by Orthopedic Care Partners.

Suggested Mix of Paid Channels

- **Search, Display & Video** Levo Health will research, deploy, and manage digital campaigns utilizing our DSP platform membership. Based on our total nationwide spending across agency accounts, Levo Health can reach more potential patients on more channels than most other medical groups.
- **Linear TV (Traditional), Connected TV (CTV), and OTT** Levo Health will research, deploy, and manage the media buying of future TV commercials. Our media buyers receive bulk discounts and added spot bonuses based on our nationwide spending across all broadcast agency accounts.
- **PLD Programmatic Display** Leverage deterministic healthcare integrations that utilize HIPAA-compliant modeling to reach consumers based on condition, insurance, ICD-10 code, etc. Levo Health can target consumer profiles across all known devices.
- **Social** These campaigns will be distributed across Facebook & Instagram in various ad formats. All campaigns will be a/b tested, and audience segments will be shared with other channels to provide an omnichannel attribution model.
- **Mobile/Call-Centric Ads** Levo Health will research, deploy, and manage a series of mobile/call-centric ad campaigns. This ad format usually requires a higher spend per conversion than social or search and display; however, the lead quality is generally higher due to the these types of prospects' higher level of intent.
- **Email/Newsletter Marketing** Levo Health will research, create, deploy, and manage a series of personalized email messages for a larger engagement journey program. These would be managed directly through our Marketing Automation platform.
- **Geofencing Marketing** Geofencing narrows down the audience size by running location-based targeting across digital platforms for precise coordinates containing concentrations of qualified patients.
- **Traditional Media** Traditional media will consist of Out-of-home advertising (OOH), targeted print publications, and terrestrial and Programmatic Audio Advertising (Spotify, Pandora, Apple Podcasts, etc.).

Advertising & Funnel Optimization

Levo Health's digital team works with our clients to provide visibility into the performance of our advertising campaigns. Levo Health is data-driven and focuses on maximizing your marketing return on investment (mROI) by optimizing campaigns, lowering cost per acquisition (CPA), and enhancing the marketing funnel at each stage of the patient's care continuum.

Here are some of the ways Levo Health's Digital Team optimizes our campaigns:

- **Defining Objectives and KPIs** Before launching any campaign, our team collaborates to define the objectives and key performance indicators (KPIs). These can include metrics like impressions, clicks, conversions, CPA, and ROI.
- **Audience segmentation and targeting** Levo Health uses data-driven insights to segment the target audience based on demographics, interests, behavior, and intent, in addition to PLD-Data. This helps to create tailored messaging and ad creative for each persona, resulting in higher engagement and conversion rates.
- **A/B testing** To optimize ad performance, Levo Health conducts A/B tests on creatives, ad copy, and landing pages. In real-time, Levo Health's digital team analyzes the results and iterates on the best-performing variations to improve campaign effectiveness continuously.
- **Channel optimization** Budgets are allocated across different channels (e.g., Programmatic, Google Ads, Meta Ads, TikTok Ads, etc.) based on their performance and target audience preferences. Levo Health also optimizes advanced bidding strategies to achieve the best possible results.
- **Keyword and placement optimization** For search and display campaigns, Levo Health continuously researches and refines keyword lists, groupings, and placements to ensure relevancy and maximize ad reach while minimizing costs. Negative keywords and exclusion lists are also used to avoid irrelevant traffic and wasted ad spend.
- **Ad scheduling and frequency capping** To improve campaign efficiency, ad scheduling and frequency capping may be deployed. This ensures that ads are served at the most effective times and that users aren't overexposed to the same ad, which can lead to ad fatigue.
- **Retargeting and remarketing** Retargeting and remarketing strategies will be deployed to re-engage patients who have interacted with Orthopedic Care Partners but have not yet converted. This helps to nurture leads, improve conversion rates, and ultimately lower the CPA, which is important for your service line.
- **Conversion rate optimization (CRO)** Cross-collaboration between the UX, content, ad ops, and development teams ensures optimized landing pages and website experiences for higher conversion rates. This involves testing different headlines, CTAs, forms, and layouts to identify the most effective combinations.
- **Attribution modeling and analytics** Attribution models (e.g., first-click, last-click, linear, time-decay, data-driven, etc.) are used to analyze the performance of each touchpoint in the patient journey. This helps Levo Health understand the impact of each channel on conversions and allocate resources more effectively.
- **Regular reporting and insights** As outlined on the Real-Time Analytics and Campaign Metrics Dashboard page, Levo Health will maintain transparent communication with Orthopedic Care Partners by providing a real-time dashboard along with regular reports and insights on campaign performance, including learnings, challenges, and opportunities for improvement.



Digital-Out-of-Home (DOOH) Advertising

Digital out-of-home media, or DOOH, is essentially traditional out-of-home media combined with AdTech. While traditional OOH takes advantage of public spaces to spread your brand's message, DOOH takes it to the next level and allows you to create personalized and interactive content while providing you with valuable information about your audience.

These DOOH ads are placed in high-traffic public areas, such as commercial city centers, transit stations, sports venues, and busy retail centers.

DOOH advertising is resilient to the downfall of third-party cookies because it relies on location-based technology to deliver targeted ads. DOOH advertising also circumvents growing concerns over ad blockers.

Today, and for decades into the future, DOOH advertising will act as an invaluable spoke in your healthcare advertising wheel, that's capable of incredible things.

For example, geofencing can trigger personalized healthcare messages on digital signage in major metro areas when patients in your target audience enter or leave it.





Point-of-Care Advertising

Digital Posters In Waiting Rooms & Clinicians' EHR Workflow.

Some medical exam rooms offer digital screens displaying educational materials while patients wait to see their doctor. These placements provide an excellent opportunity to connect with patients while they wait and give you added flexibility to design animated or interactive content.

Digital screens can provide rotating content, allowing you to incorporate a great deal of information in a digestible way. Because patients often look for something to do while they wait, you are likely to have their undivided attention for longer than you would in other settings.

The Doctor Will See You... Soon?

Patients say the waiting period is often the worst part of the doctor's visit.² In fact, 63% said it is the most stressful thing about going to the doctor.³

Digital screens can provide rotating content, allowing you to incorporate a great deal of information in a digestible way.

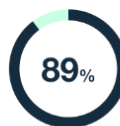
Because patients often look for something to do while they wait, you are likely to have their undivided attention for longer than you would in other settings.



Most patients are waiting around 19 minutes to see their doctor.⁴



More than two-thirds of patients said relevant communication enhances their waiting room experience.⁵



89% of patients and their caregivers watch TV or read wellness information in the waiting room.⁶



Social Media Listening & Engagement

You cannot buy engagement. You have to build engagement.

Levo Health's proprietary software can generate and engage targeted followers based on discussed content and keyword usage. Levo Health's social media management services will increase awareness and website traffic to drive more qualified and educated leads into your customer journey funnel.

Social Listening

Levo Health's Social Listening tools help brands like yours tap into the global social conversation to extract actionable insights, identify industry gaps, and improve brand health. Our platform, can access and utilize industry, brand, and competitive insights. It can also provide in-depth tracking and analyze conversations around relevant topics to understand your consumer sentiment and ensure brand health.

Social Engagement

Overflowing inboxes and time-consuming tasks affect your team's ability to deliver relationship-building experiences on social media. From community management to customer support, Levo Health's Social Listening Platform provides the tools needed to boost efficiency, speed up response times, and personalize responses while monitoring social activity and organizing and responding to all incoming messages, all from a single location.

Paid Social Media Lead Generation

Using paid social media channels to engage healthcare consumers allows for two-way communication and community building, unlike traditional channels, which are more unidirectional. Levo Health will research, target, and optimize social channel marketing campaigns targeting people in and around your service areas. The benefit of marketing directly to patients is that Levo Health can focus solely on individuals who meet specific demographic and purchasing behavior patterns, reducing the chance of wasted advertising dollars.

Paid Social Media Branding Campaigns

Levo Health proposes to run branding campaigns highlighting the faces of Orthopedic Care Partners's providers, employees, and patients, putting a human touch on the face of the brand. These campaigns will help to elevate community engagement by humanizing the care process with real people, highlighting actual results.



Customer Journey & Marketing Automation

Create customer journeys that capture & convert new leads.

Marketing automation (MA) will capture new leads from your website and landing pages and nurture them with personalized messages. In addition, MA will automate repetitive tasks like educating new patients, assigning leads, scheduling appointments, and following up on patient leads.

Marketing automation helps to develop personal relationships with every prospective, past, and current patient by engaging at the right time on the right channel.

Personalize Journeys by Condition, Treatment, or Digital Activity

Levo Health's marketing automation platform can segment your leads and provide custom journeys based on the type of condition or specific treatment that the prospective patient is requesting.

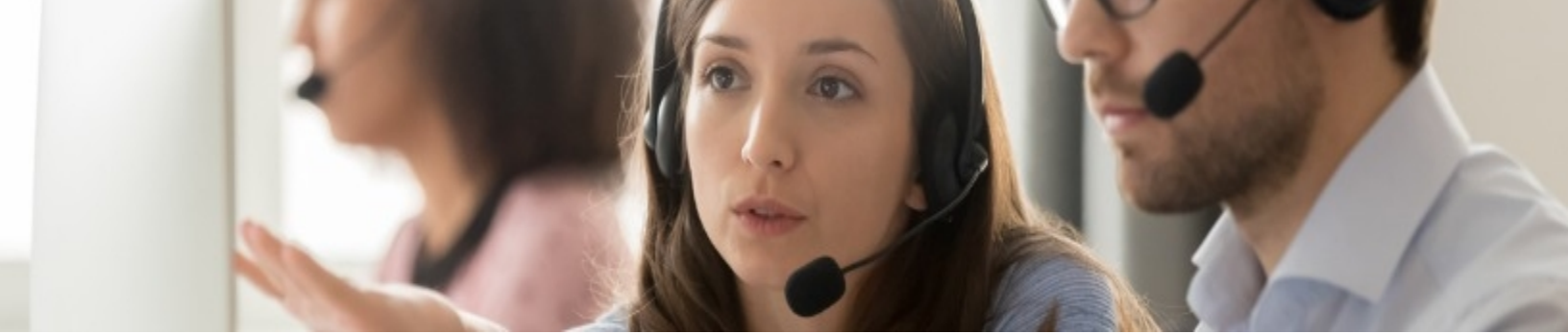
A customer journey map is a powerful way of visualizing the customer experience. It tells a story of how your patients move through the marketing and sales funnel, allowing you to enhance their user experience at every touchpoint. In addition, customer journey mapping helps address customer pain points and identify new marketing opportunities.

Focus On The Most Engaged Patients With Lead Scoring

Levo Health's marketing automation platform uses lead scoring to identify qualified leads, prioritize leads, and improve conversions. Follow up with leads, reactivate past prospective patients, and track every interaction your patients have with your website or landing pages.

Understand how to convert more prospective Patients in less time.

- See all prospective leads in one easy-to-use sales pipeline.
- Activity reminders keep you on top of all callbacks, emails, etc.
- Connect your email and other tools – create a single data location.
- Save call logging activities to your prospective lead records
- Easily understand when and why prospective patient deals convert or not.
- Learn what activities have the best conversion rate (phone, SMS, email)



Patient Experience Management (PXM)

Better outcomes for your patients. Better return on your investment.

Before engaging in any paid marketing efforts, Levo Health's Patient Experience Management (PXM) system will be deployed and tailored to meet the unique needs of Orthopedic Care Partners. The proposed method will help develop and maintain lasting relationships with past, current, and future patients while improving their access to quality care.

Implement Coaching, Status, and Performance Evaluations

- Meet with key staff members to discuss current processes and handling procedures.
- Evaluate preferred methods for customer service, retention, collection departments, and best practices for internal procedures and call-handling situations.
- Call Center and company policies developed explicitly for Orthopedic Care Partners's internal specifications.
- Procedures developed specifically for selling Orthopedic Care Partners's services, providing customer service, and helping with retention.
- Create call and sales scripts, including rebuttals for use by Patient Engagement Professionals.
- Orthopedic Care Partners to review call scripts with recommendations or approvals.
- Create and implement a Patient Flow Process.
- Live call handling training and individualized assessments to ensure compliance.
- Upload potential and current patients into a patient relationship management system.
- Implement a Proactive Headsup interface on appropriate web pages.
- Implement marketing automation software to facilitate lead scoring, nurturing, and drip email campaigns.

Offsite Patient Experience Call Centers

If the lead volume requires it, Levo Health's team of patient engagement professionals can assist with lead qualification, lead conversion, and post-visit follow-up for an additional seat fee. Following a prospect's conversion to a patient, the patient engagement professional continues to be an available resource, checking on their progress. The dedication of the patient engagement professional provides relief to the practice's administrative staff and provider(s) while simultaneously providing the patient with a positive treatment experience.



Patient-Focused Webinars

Empowering Patients through Educational Webinars.

Patients exploring orthopedic practices often face a complex array of healthcare options and information, making it crucial to provide specific, comprehensive guidance. Educational webinars serve as a vital platform where patients can gain in-depth knowledge, ask critical questions, and connect with experts and peers. This approach empowers them to make informed decisions about their chronic and preventive care, diagnostics, and overall health management.

Goals of Webinar

1. **New Patients** – Educate, nurture, and convert a large audience of potential patients to the care options offered by Orthopedic Care Partners.
2. **Existing Patients** – Ongoing educational programs to drive continuous engagement with existing panel patients.

ICD-9 & ICD-10 Analysis

Levo Health will collaborate with Orthopedic Care Partners to segment and target specific patient groups by ICD-10 codes, focusing on those most relevant to the planned series of educational webinars. This data will be integrated into our marketing automation platform to optimize patient outreach efforts.

Topic Selection & Interview Phase

Once the webinar topics are finalized, Levo Health will work with Orthopedic Care Partners to conduct interviews and generate content for blog posts, social media, and webinars. Our team will also collaborate with the hosting provider to create and optimize the webinar presentation deck.

Webinar Registration Campaigns

Levo Health will customize the creative elements needed to advertise the webinars, engaging past, current, and prospective patients through the channels they most frequently visit and use. To increase audience attendance, a series of engaging social posts and emails will be created for the webinars.

Post-Webinar Follow-Up & ROI Reporting

After each successful webinar, we will follow up with attendees and those who registered but did not attend. Follow-up communications will include the recorded webinar, relevant educational materials, and additional resources related to the topics discussed. The main goal of this post-webinar communication is to further educate patients and guide them along their care path. We will track webinar attendance and engagement metrics, integrating this data into our overall ROI analysis to assess the impact on patient care and business outcomes.



8K Video Production & Syndication

Humans retain 95% of a message delivered through video, compared to only 10% through text.

Utilizing videos is an incredibly effective strategy to convey your brand's unique story, showcase your highly-skilled medical team, highlight your exceptional services, and share inspiring patient success stories with your target audience across their preferred channels and devices.

Crafting Compelling Stories for Your Healthcare Brand

Levo Health's video production team will provide compelling, interesting, and emotionally engaging storytelling to make your business come to life. The goal of video production is to transform your practice from a one-dimensional commodity in the mind of your target audience into a three-dimensional solution that they can connect with and imagine the medical outcomes offered by your team. Video done right can make your business and your staff unforgettable.

All footage is shot in 4K digital so that the videos will look crisp on all devices and TVs over the next 5+ years. Production will be shot both in and out of the office and will educate people about the related conditions and available treatment options offered by Orthopedic Care Partners.

Bringing Healthcare to Life: Videos that Share Our Unique Story

The footage shot will be used to create approx 20 - 25 videos for distribution across marketing campaigns, social channels, your website, TV programming, and other patient-facing platforms. Additional costs may be required, such as talent, location costs, permitting, specialized equipment, etc. All additional costs will be discussed with the client during the project scoping process.

Levo Health's video production team will film:

- TV commercials (Broadcast & Digital)
- Patient testimonial videos
- Provider & staff spotlight videos
- Medication & disease-state overview videos
- General educational company overview videos



Public Relations & Reputation Management

It takes 20 years to build a reputation and five minutes to ruin it.

Levo Health's media and PR team works on both sides of media, having worked for media companies and those pitching stories to news outlets. It is difficult to find "free" media opportunities; however, they exist when a medical group's process has shown a miraculous change in their patient's health and wellness.

Crafting Impactful Key Message

Levo Health can develop and refine three to five pivotal messages for your PR agenda over the upcoming year. These messages are honed through rigorous testing to ensure maximum impact and alignment with your brand ethos. Any syndication would be an additional cost covered by Orthopedic Care Partners.

Enhancing Media Presence with Strategic Communication

- **Enhanced Stakeholder Communications:** We prioritize improved interactions with key stakeholders, including patients, media, employees, shareholders, and the general public, ensuring that each message resonates with its intended audience.
- **Creative Key Message Development:** Our brainstorming sessions aim to create messages that not only inform and educate but also entertain and engage your audience.
- **Robust Media Relations:** Our services extend to crafting compelling news releases, pitching stories to media outlets, fostering significant media relationships, and securing positive news coverage.
- **Speaking Engagements for Reputation Building:** We leverage speaking opportunities to enhance your reputation, establishing trust and credibility through well-crafted speeches and talking points.
- **Crisis Management:** Levo Health is equipped to handle crisis situations, providing timely and effective management as required.
- **Promoting Practice Announcements and Expertise:** We strategically position your providers as subject matter experts through practice announcements and storytelling.
- **Continuous Performance Monitoring:** Our tools and methodologies enable ongoing measurement of results, offering daily and weekly insights for continual improvement.

Leveraging our dual experience in working for and with media companies, Levo Health is adept at identifying and capitalizing on those rare "free" media opportunities, especially when a medical group demonstrates remarkable improvements in patient health and wellness.



ORTHOPEDIC CARE
PARTNERS

Terms of Service | Orthopedic Care Partners

This Terms of Service (the "Agreement"), is dated as of October 1, 2025, and entered into by and between Levo Healthcare Consulting, LLC, (or "Consultant"), and Orthopedic Care Partners Management, LLC (the "Client").

1. Retention. By this Agreement, the Client retains the Consultant to perform and the Consultant agrees to perform, the Services in accordance with this Agreement.

2. Services. The Consultant will provide the proposed services listed under the "Scope of Services" specifically including the services detailed in the section entitled Scope of Services in accordance with this Agreement. All services shall be provided in a timely manner in accordance with the project management and timeline framework agreed to in writing by the parties as part of the Phase 1, Pre Planning Roadmap.

In the event that the Consultant fails to timely perform the Services within mutually agreeable timeframes, the Client shall notify the Consultant in writing of the Performance Deficiency and the Consultant shall have thirty (30) days from such notice to correct the Performance Deficiency. During the thirty (30) day notice period, without prejudice to any other rights or remedies of the Client, the Client shall be relieved of all payment obligations under this Agreement until the provision of Services has been completed and the Performance Deficiency fully cured. If the Consultant fails to cure the Performance Deficiency within the thirty (30) day notice period, Client shall have the right to terminate this Agreement immediately. Further, if within the first year of the term of this Agreement, it is discovered that the Services do not comply with the requirements of this Agreement, then the Client shall have the right to require the Consultant, free of charge and within thirty (30) days, to re-perform the Services to the Client satisfaction in compliance with the requirements of this Agreement.

3. Compensation. In consideration for the Services performed by Consultant pursuant to this Agreement, the Client shall pay the Consultant the following amounts:

(b) Campaign Management: Months (1-12) \$20,000 non-refundable retainer per month for 200 hours per month (the "Baseline Hours")* The parties agree that the following matters are included in the monthly retainer agreement:

- **Website Migration.** The migration of all other OCP practice websites to the new OCP practice template.
- **Dashboard Development.** Development of a fully automated and centralized reporting dashboard.
- **Messaging.** Development of enterprise creative messaging with a localized approach.
- **Media Channels.** Recommendations to optimize agreed upon media channels.
- **Marketing Attribution Model.** Design of the OCP marketing attribution model.
- **Tucson Orthopaedic Institute** website build.
- **Platform Consolidation.** Levo Health will coordinate with existing vendors to migrate assets to a single, centralized system.

(b) Ongoing Monthly Services: Each practice may select from the tiered support options (Tier 1, Tier 2, or Tier 3) outlined in the "Pricing Tiers" section. Monthly fees will be invoiced on the 1st of each month and are inclusive of up to the allotted hours per tier. Any additional hours beyond the Baseline Hours will be billed at \$200/hour, with prior written approval from the Client.

(c) Optional Add-On Services: Practices that elect to add services not included in their selected tier (e.g., social media management, campaign support, creative production) will be invoiced separately based on a project estimate or monthly allocation. All optional services will be billed at \$175/hour unless otherwise specified in writing.

(d) Acquisition Onboarding: For new practices, there will be a one-time fee between \$5,000 – \$7,000 for website migration cost and a monthly fee of \$850/month (5 hours) for ongoing SEO support.

(e) Multi-Practice Billing: Invoices shall be issued centrally to Client with an itemized invoice for each site or service area as required for reconciliation and reporting.

(f) Marketing Budget: TBD**

**Consultant Fees will range between 10 – 15%, based on the media channel and total annual budget.

4. Compensation. The parties agree to submit payment to the consultant via Credit Card or ACH on the first of each month. The Client will assess and pay credit card fees at 2.25% if that payment method is used.

5. Term. This Agreement will commence on October 1, 2025, and will continue for an initial period of twelve (12) months (the "Initial Term"). During this period, Levo Health will complete the scoped website development work and provide ongoing monthly services based on the selected tier per practice. Monthly service tiers (Tier 1, 2, or 3) will be billed on a rolling basis and may be adjusted by Orthopedic Care Partners or its partner practices with 30 days' written notice.

This Agreement will automatically renew for subsequent twelve-month terms unless either party provides written notice of termination at least thirty (30) days prior to the end of the then-current term. Notwithstanding the foregoing, either party may terminate this Agreement at any time, with or without cause, upon sixty (60) days written notice to the other party.

6. Confidential Information Defined. A party's "Confidential Information" is defined as any confidential and/or proprietary information of a party or its Affiliates (defined below) which is disclosed to the other party in writing marked confidential or identified orally as such, or which the receiving party should otherwise reasonably construe as confidential or proprietary under the circumstances. Such confidential Information shall include, without limitation, any trade secrets, processes, financial data, technical data and documentation, strategic planning, product service specifications, prototypes, computer programs, software, drawings, sketches, samples, databases, models, marketing data, and all client information and/or data.

The terms of this Agreement shall be deemed Confidential Information. The Consultant shall sign the Business Associate Agreement ("BAA") attached hereto and incorporated by reference as Exhibit A. For purposes of this Agreement, an "Affiliate" is, with respect to either party, any individual, corporation, partnership, joint venture, or other entity, directly or indirectly, controlling, controlled by, or under common control with, such party.

Each party will hold the other party's Confidential Information in confidence and will not disclose such Confidential Information to third parties nor use the other party's Confidential Information for any purpose other than as required to perform under this Agreement.

Such restrictions will not apply to Confidential Information which: (a) is already known by the recipient, (b) becomes publicly known through no act or fault of the recipient, (c) is received by the recipient from a third party that was not under restriction on disclosure or use or (d) is independently developed by the recipient without reference to the Confidential Information.

The restriction on disclosure will not apply to Confidential Information that is required to be disclosed by a court, government agency, regulatory requirement, or similar disclosure requirement, provided that the recipient will first notify the disclosing party of such disclosure requirement or order and use reasonable efforts to obtain confidential treatment or a protective order. The parties' respective obligations hereunder will survive the termination of this Agreement for a period of three (3) years.

7. Limitations on Liability. Except for claims arising from a breach of Section 6 (Confidentiality) including a breach of the BAA, the Consultant's liability to the Client for actual damages from any cause whatsoever, and regardless of the form of the action, whether in contract, tort, or otherwise, will be limited to the amounts paid to the Client as compensation pursuant to this Agreement. EXCEPT FOR CLAIMS ARISING FROM A BREACH OF SECTION 6 (CONFIDENTIALITY) INCLUDING A BREACH OF THE BAA, NEITHER PARTY WILL BE LIABLE TO THE OTHER IN ANY EVENT FOR ANY SPECIAL, INCIDENTAL, INDIRECT OR CONSEQUENTIAL DAMAGES (INCLUDING ANY DAMAGES FOR LOSS OF BUSINESS PROFITS, BUSINESS INTERRUPTION, OR LOSS OF BUSINESS INFORMATION), EVEN IF INFORMED OF THE POSSIBILITY THEREOF IN ADVANCE.

9. Staff. Each party agrees to not poach, consult with or hire employees, vendors, or suppliers without express written consent of the consultant for a period of three years following the last date of engagement under this contract.

10. Responsibility for Releases. Consultant shall obtain releases, licenses, permits, or other authorization to use testimonials, copyrighted materials, photographs, artwork, or any other property or rights belonging to third parties obtained by us for use in performing services for you.

11. Client Responsibilities For Releases. The Client guarantees that all elements of text, images, or other artwork provided to the consultant are either owned by the client or that the client has permission to use them. When the final payment has cleared, copyright will be automatically assigned as follows: The client will own the visual elements created for the project. The consultant will give the client source files and finished files and the client should keep them somewhere safe as the consultant is not required to keep a copy. The client owns all elements of text, images, and data provided unless someone else owns them.

12. Client Responsibility For Accuracy. The client shall be responsible for the accuracy, completeness and propriety of information concerning the products and services furnished to the consultant verbally or in writing in connection with the performance of this Agreement.

13. Rights, Ownership and Usage. Subject to Consultant's receiving full payment under this Agreement, Consultant assigns to the Client, without representation or warranty, all rights, title and interest Consultant may have in any work specifically created by Consultant for the Client pursuant to this Agreement, except that:

- (a) Consultant may use and distribute such work as part of its portfolio for promotional purposes;
- (b) Consultant shall own and retain all rights to any and all concepts, ideas, designs, proposals and other work and materials (collectively, "Work") which have been presented to the Client but not included in the final work product;
- (c) If upon termination there exist any materials furnished by the Consultant or any services performed by the Consultant for which the client has not paid in full, until such time as the Client has paid the Consultant in full, the Client agrees not to use any such materials, in whole or in part, or the product of such services.

14. Transfer of Materials. Upon the termination or expiration of this agreement, provided that there is no outstanding indebtedness then owing by the client to the consultant, the consultant shall transfer or assign the client final, production-ready materials in its possession or control belonging to the client. The client agrees to pay for all costs associated with the transfer of materials.

15. Entire Agreement. Except as otherwise set forth or referred to in this Agreement, this Agreement constitutes the sole and entire Agreement and understanding between the parties hereto as to the subject matter hereof and supersedes and replaces all prior discussions, agreements, and understandings of every kind and nature, oral or written, between the Consultant and Client or its Affiliates.

16. Severability. If any provision of this Agreement is held to be illegal, invalid, or unenforceable under any present or future law, then that provision will be fully severable. In such instance, this Agreement will be construed and enforced as if the illegal, invalid, or unenforceable provision had never comprised a part of this Agreement, and the remaining provisions of this Agreement will remain in full force and effect.

17. Miscellaneous. This Agreement (a) shall be governed by and construed in accordance with the laws of the State of Florida, (b) may not be assigned without the prior written consent of the other party, and (c) may be amended only by written agreement signed by both the Client and the Consultant. In the event of a conflict in terms, the terms set forth in this Agreement shall prevail, unless explicitly agreed to by the parties in writing.



Signatures

The undersigned agrees to the terms of this agreement on behalf of his or her organization or business.

On behalf of Orthopedic Care Partners (authorized signature):

Name: Tim Corvino, M.D.

Title: Chief Executive Officer

Tim Corvino, M.D.

2025-09-29 16:55:43 (EDT)

On behalf of Levo Healthcare Consulting, LLC (authorized signature):

Name: Fergus Linskey

Title: Chief Executive Officer