

Planning a Phased Rollout

Exploratory draft. Not presented or implemented.

Anonymized workstreams, dependencies, and implementation gates.

Client identities, delivery baselines, and the scale model have been omitted.

SECTION 2 – WORKSTREAMS AND SEQUENCING

Core Phase 2 Workstreams

This is the high-level Phase 2 view only. It preserves the main workstreams and the build-boundary logic from the broader SOW, while removing premature calendar commitments. The purpose is to show the planning-first path: scoped planning package, implementation plan, separate build SOW, then gated activation only where readiness supports it.

01 Growth Engine Demand generation, content, paid learning, engagement loops, and analytics feedback.	02 Center of Excellence Knowledge hub, content migration, publishing structure, clinical review paths, and patient education.	03 Telemedicine Portal Practice-owned patient onboarding, account, intake, booking, payment, and follow-up foundation.	04 RingCentral Communications review, routing logic, messaging workflows, handoffs, and measurement signals.	05 Ivy Expansion Expanded assistant surfaces, guided flows, scheduling handoffs, and future channel extensions.
06 Athena Enablement Approval path, access, mappings, sandbox work, validation, and production readiness.	07 bot0 Customization Internal control layer for dashboards, role views, workflows, QA, and operating visibility.	08 Organizational Analytics Cross-functional measurement, reporting, operational benchmarks, alerts, and review cadence.	09 Operations Engine Agentic clinical operations, intake, scheduling, patient queues, and execution workflows. LATER	10 Revenue Engine Claims, denials, CPT visibility, revenue-cycle dashboards, and downstream revenue automation. LATER
Workstreams are scope lanes, not immediate build commitments. Each should first pass through planning and scoping so the practice can approve the next implementation step deliberately.				

Planning precedes build No workstream should move into implementation until the detailed planning package defines scope, owners, dependencies, and acceptance.	Build is separately approved The next contract step is a scoped build SOW, not an automatic continuation from this high-level view.	Scope stays bounded Future capabilities can be shown for visibility without becoming part of an approved implementation build.
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Planning–First Sequencing

This replaces the month-by-month sequence grid. The sequence below treats planning and scoping as the first contract step for every workstream that is not already fully defined. Build work follows only after the practice approves the implementation plan, dependencies, budget range, owner model, and acceptance criteria.

WORKSTREAM	PLANNING FIRST	SCOPING OUTPUT	BUILD CONTRACT	GATED / LATER
Program governance	PLANNING SOW Define the planning queue, owners, decision cadence, acceptance model, and what needs a separate build SOW.	PLAN OUTPUT Planning register, dependency map, approval path, and recommended next contracts.	SEPARATE SOW Governance continues only around approved build scopes and accepted workstreams.	NO FIXED DATE No build timing is promised until each lane has a plan, owner, and acceptance criteria.
Growth Engine	PLANNING SOW Scope channels, content types, campaign assumptions, approval workflow, analytics inputs, and first-wave priorities.	PLAN OUTPUT Growth implementation plan with workflow map, staffing assumptions, budget range, and launch criteria.	SEPARATE SOW Content, paid learning, engagement, and analytics workflows move into a build SOW after the plan is approved.	NO FIXED DATE Deeper attribution, new channels, and autonomous loops wait for clean data and early proof.
Website / COE	PLANNING SOW Validate taxonomy, source-use rules, content model, review workflow, population approach, and first-wave priorities.	PLAN OUTPUT COE implementation plan, article model, migration plan, source rules, and future build estimate.	SEPARATE SOW Design, ingestion engine, rewrite pipeline, QA, and publishing move into the next implementation SOW.	NO FIXED DATE Clinical sign-off, source-material readiness, and medical review capacity control pace.
Telemedicine Portal	PLANNING SOW Map the patient journey, account model, intake, booking, payment, task, and operational handoff requirements.	PLAN OUTPUT Portal implementation plan with user flows, dependency register, acceptance criteria, and build estimate.	SEPARATE SOW Account, intake, booking, payment, and portal surfaces build only after the portal plan is approved.	NO FIXED DATE Insurance, payment, scheduling, compliance, and Athena sync decisions affect activation.
RingCentral	PLANNING SOW Review current configuration, map call/text workflows, routing gaps, ownership, reporting needs, and handoff logic.	PLAN OUTPUT Communications implementation plan with workflow map, vendor constraints, and recommended first build scope.	SEPARATE SOW Routing, handoff, measurement, and integration improvements follow under a separately approved build scope.	NO FIXED DATE Production work depends on account access, vendor constraints, and the practice configuration decisions.
Ivy Expansion	PLANNING SOW Scope Ivy's next role, grounding sources, escalation rules, guided flows, channels, and handoffs.	PLAN OUTPUT Ivy expansion plan with module list, safety boundaries, channel sequence, and acceptance criteria.	SEPARATE SOW Website, article, provider, and scheduling handoffs move into build after the expansion plan is approved.	NO FIXED DATE Scheduling, telehealth, SMS, WhatsApp, voice, and autonomy depend on portal and Athena readiness.
Athena Enablement	PLANNING SOW Baseline the technical spec, segment workflows, map endpoints, client configuration, Preview needs, risks, and blockers.	PLAN OUTPUT Athena readiness map, workflow inventory, recommended starter use case, and future build SOW assumptions.	SEPARATE SOW Sandbox, validation, starter workflow, and production readiness follow after Athena planning is accepted.	NO FIXED DATE Production timing depends on external approval, client configuration, and vendor readiness.
bot0 / Analytics	PLANNING SOW Define role views, dashboard users, metric buckets, source tracking, permissions, review cadence, and reporting outputs.	PLAN OUTPUT bot0 and analytics implementation plan with data requirements, dashboard map, and first build scope.	SEPARATE SOW Dashboards, workflow controls, permissions, and reporting build after source requirements are approved.	NO FIXED DATE Connected reporting depends on source systems, workflow adoption, and clean operating data.
Ops / Revenue Engines	PLANNING SOW Map candidate workflows, operational owners, Athena dependencies, risk controls, queues, dashboards, and starter priorities.	PLAN OUTPUT Operations/revenue planning package with prioritized waves and separate implementation estimate.	SEPARATE SOW Patient ops, claims, denials, CPT, and revenue dashboards wait for a later approved implementation SOW.	NO FIXED DATE Activation waits for Athena readiness, operational owner alignment, and explicit acceptance criteria.

Contract Logic

The current COE and Athena SOW pattern is the model for the rest of Phase 2: first create the implementation plan, then decide whether to contract the build. The high-level roadmap can show where workstreams may go, but it should not imply that every lane starts implementation immediately.

Phase 2 Build Path & Scope Boundary

Phase 2 should be structured as planning first, then implementation. The current planning SOW pattern for COE and Athena should apply across the broader roadmap: define the workstream, map dependencies, identify the owner model, produce a budget and rollout plan, and only then decide whether the practice wants a separate build contract.

Planning inputs

Confirm before build

Current systems and access

Workflow owners

Available source material

Data permissions

Clinical review capacity

Budget assumptions

Acceptance criteria

Dependencies and blockers

Planning—First Phase 2 Path

planning SOWs before separate implementation SOWs

01 Growth Engine

01 Planning SOW

02 Implementation plan

03 Build SOW if approved

04 Foundation build

02 Center of Excellence

01 Planning SOW

02 Taxonomy + source rules

03 Next build SOW

04 Design / ingestion / QA

03 Telemedicine Portal

01 Planning SOW

02 Journey + dependency map

03 Next build SOW

04 Portal foundation

04 RingCentral

01 Planning SOW

02 Workflow + access map

03 Next build SOW

04 Routing / handoffs

05 Ivy Expansion

01 Planning SOW

02 Module + channel map

03 Next build SOW

04 Guided flows / handoffs

06 Athena Enablement

01 Planning SOW

02 Readiness + workflow map

03 Next build SOW

04 Sandbox / validation

07 bot0 Customization

01 Planning SOW

02 Role + data model

03 Next build SOW

04 Workspace / dashboards

08 Organizational Analytics

01 Planning SOW

02 Metric + source map

03 Next build SOW

04 Reporting foundation

09 Operations Engine

01 Planning SOW

02 Workflow wave map

03 Future build SOW

04 Activate after readiness

10 Revenue Engine

01 Planning SOW

02 Claims / denials map

03 Future build SOW

04 Activate after readiness

Future / Out of Scope

Expansion after proof, readiness, and approval

Every Phase 2 foundation deepens

Website, COE, Telehealth, Ivy, bot0, analytics, operations, and revenue systems can expand after the first usable layer is proven.

COE clinician learning

Courses, assessments, standard-of-care training, and targeted knowledge augmentation.

Advanced telehealth modules

Labs, supplements, follow-up journeys, deeper portal tasks, and richer Athena-aware care paths.

Cross-channel Ivy autonomy

Persistent memory and action-taking across web, SMS, WhatsApp, voice, and future channels.

Specialized SLMs and automation

Workflow-specific lower-cost models plus broader operations and revenue automation once patterns stabilize.

Boundary rule: this high-level page does not authorize blind implementation. Each unresolved workstream should first be contracted as planning/scoping work. Build scope begins only when the planning package defines the dependency path, acceptance criteria, data model, budget, timeline assumptions, and the practice owner clearly enough to price the implementation SOW.