The Eleos Customer Experience

INDIANA COUNCIL
of Community Mental Health Centers, Inc.

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Agenda

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Introductions

Caleb Dawson

Senior Director of Partnerships

Christy Doneff

AVP of Strategic Partnerships

Travis Moore

VP of Growth

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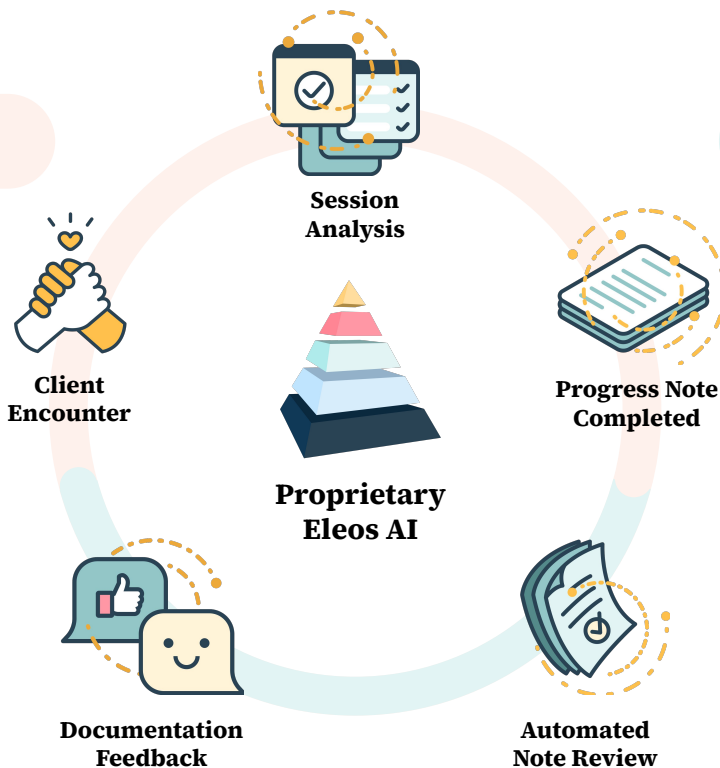# Introductions

Dr. Denny Morrison

Chief Clinical Officer

Larry Cederberg

Director of Implementation

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A platform that unlocks more care, less ops

documentation

compliance

Session Analysis

Progress Note Completed

Client Encounter

Proprietary Eleos AI

Documentation Feedback

Automated Note Review

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documentation

Hand off the paperwork—and focus on care.

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Serve Providers Wherever Your Clients Are

- Seamlessly embeds within your EHR and telehealth workflows

- Compliant with relevant privacy regulations

- Compatible with all* EHRs and no APIs required

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Desktop

Audio
Create your note in real-time using generative AI. Review session insights to improve care delivery.

Text Input
Create your note using a minimum of 6 bullet points when audio capture is not available
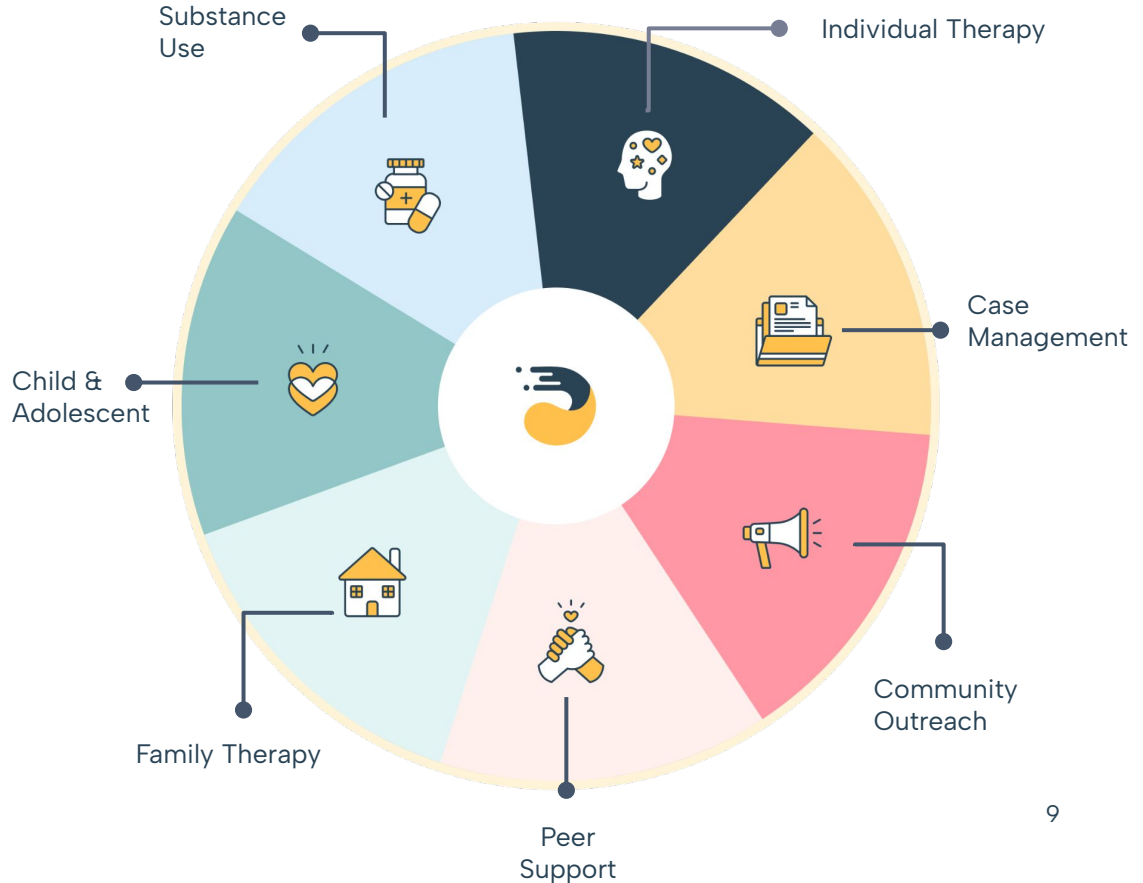
On Your Mobile Device

Mobile
Document on-the-go and finalize notes in your EHR for a seamless documentation experience.

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*Workflow alignment meeting required for all future clients to review EHR workflows

Comprehensive support for your use cases — in the office or in the field

We also support:

- Desktop and mobile devices
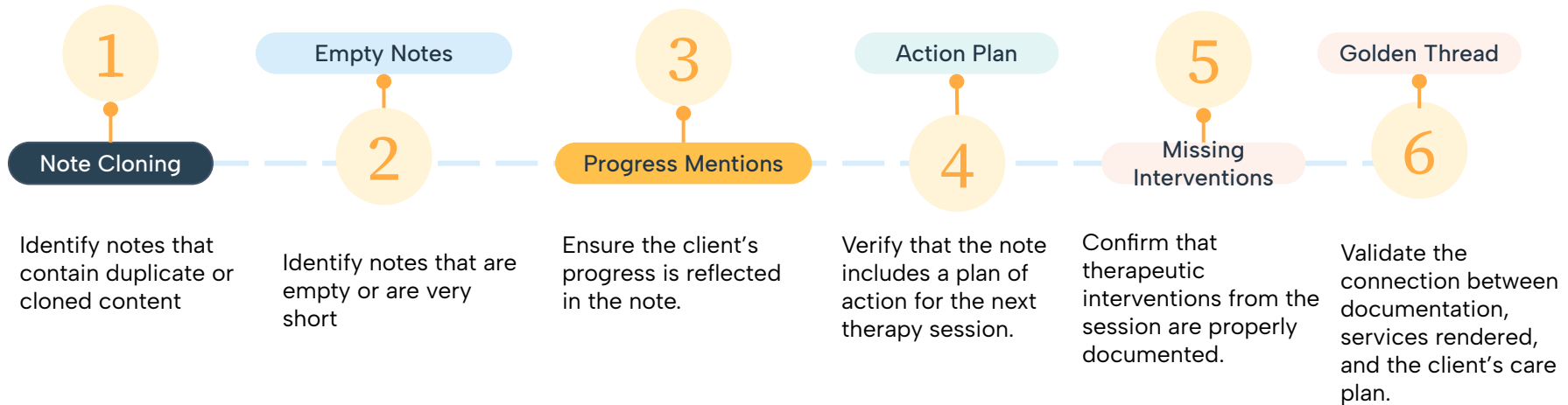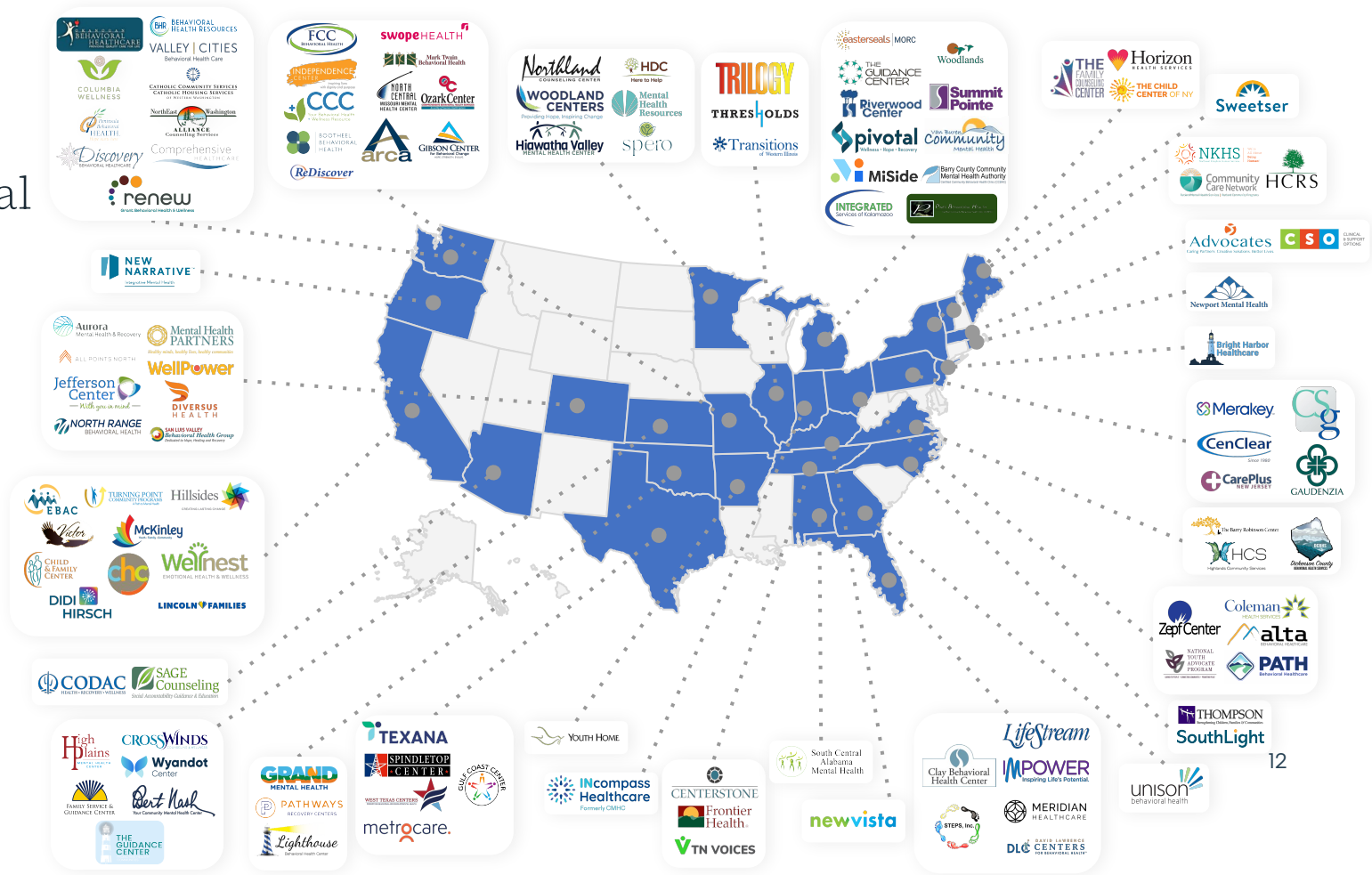- Concurrent and collaborative documentation

Substance Use

Individual Therapy

Case Management

Community Outreach

Peer Support

Family Therapy

Child & Adolescent

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compliance

Make manual note reviews a thing of the past.

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6-point compliance analysis for every note

1

Note Cloning

Identify notes that contain duplicate or cloned content

Empty Notes

2

Identify notes that are empty or are very short

3

Progress Mentions

Ensure the client's progress is reflected in the note.

Action Plan

4

Verify that the note includes a plan of action for the next therapy session.

5

Missing Interventions

Confirm that therapeutic interventions from the session are properly documented.

Golden Thread

6

Validate the connection between documentation, services rendered, and the client's care plan.

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150+
customers in behavioral health

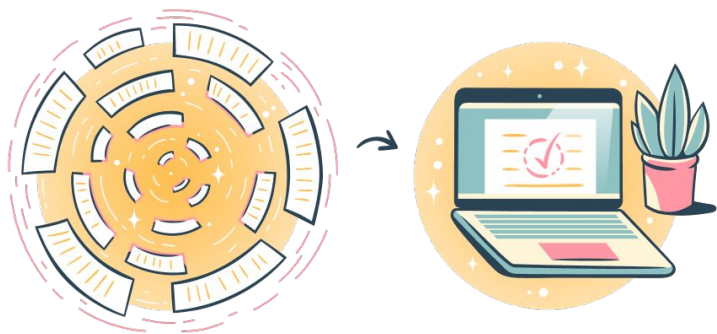NATIONAL COUNCIL for Mental Wellbeing
GOLD
PARTNER

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Implementation

Larry Cederberg

Our Implementation Approach

→ **Keeping it simple**
- We keep focused on what is essential to a successful go-live
- We ensure you have the right information and resources at every step of the journey

→ **Guiding you through key decisions**
- Our team provides recommendations to ensure you always know what's next without overloading your team
- We'll look to you to help us understand your organization, so we can best fit your needs

→ **Delivering impact quickly and smoothly**
- We balance speed with quality, making sure you feel confident leading up to go-live

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Implementation Process & Discussion Themes

1 Discovery*

Complete worksheet and provide requirements via secure email

- List of Note types, with screenshots
- EHR credentials with test clients and access to note types
- Single sign-on (SSO) setup & test user credentials
- Telehealth integration & test user credentials

***Discovery should be completed prior to kickoff**

Partnership Kickoff

2 Embedding/Configuration

Workflow alignment and configuration demo

- Eleos will configure the browser extension overlay to your note types
- Eleos will set up SSO integration to allow logging into Eleos with agency credentials
- Eleos will set up telehealth integration
- If using Sensi for F2F audio sessions, Eleos will ship a device for testing

Workflow Alignment

Training Planning

3 Testing & Go-Live Prep

Identify Users for end-to-end testing

- Eleos will demo the customization
- Client will test Sensi network compatibility
- Eleos will set up ~60 minutes with 2-4 of your identified super users to test the end-to-end flow
- Upon completion of testing, we reach Technical Readiness

Technical Readiness
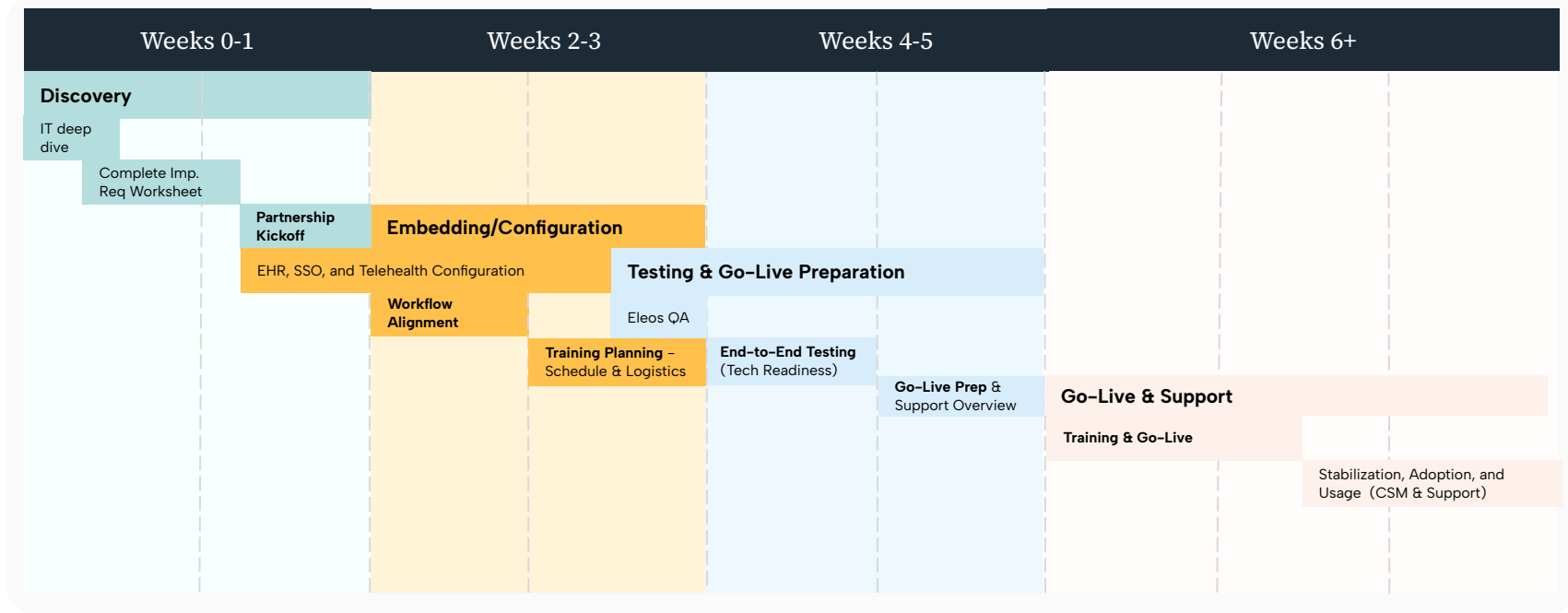
Go-Live Planning & Support Intro

4 Training and Go-Live

Finalize user list & training logistics

- Share a list of providers' information (Eleos will provide a template)
- Finalize training session dates, times, and location/virtual meeting link
- Eleos will ship Sensi devices and swag for each provider
- Eleos will provide training materials and recording (if virtual) following the training

Training & Go-Live

Project Timeline

Weeks 0-1	Weeks 2-3	Weeks 4-5	Weeks 6+

Discovery

IT deep dive

Complete Imp. Req Worksheet

Partnership Kickoff

Embedding/Configuration

EHR, SSO, and Telehealth Configuration

Workflow Alignment

Testing & Go-Live Preparation

Eleos QA

Training Planning – Schedule & Logistics

End-to-End Testing (Tech Readiness)

Go-Live Prep & Support Overview

Go-Live & Support

Training & Go-Live

Stabilization, Adoption, and Usage (CSM & Support)

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Your organization's role in ensuring a successful implementation

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Key Stakeholders from your organization

1 IT Networking Lead

Main responsibilities:

- Network compatibility
- Extension deployment (if applicable)

1–2 hours a week for 4 weeks

2 EHR Admin

Main responsibilities:

- EHR User management
- EHR note types

1–2 hours a week for 4 weeks

3 Site Leads

Main responsibilities:

- To help drive adoption at go-live site(s)

30 mins a week for 4 weeks

4 Training Lead

Main responsibilities:

- Train on Eleos' platform post initial rollout
- Advise on existing training systems

0.5 hours a week During and after Go-live

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Additional needs

Workflow considerations

- Input on the configuration to ensure it meets your organization's specific needs
- If your organization has specific needs for consent
- If your organization has an IT Help Desk

Identifying users, segmentation & training needs

- Help us understand your programs, services, and providers' day-to-day, so we can provide a recommendation for training
- Provide a list of your staff that will be using Eleos, along with some key information – we'll provide a template
- Ongoing user management strategy
- Help us identify dates and times for training

Customer Success

Christy Doneff

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Partnership Goals-Example

Staff Retention and Recruitment

- Retain clinicians
- Attract top talent
- Grow clinicians
- Improve patient care

Innovative & Tech-forward

- Empowering clinicians with the latest tools
- Industry leaders through innovation and data–driven decision making

Reduce Documentation Time

- Reducing clinician documentation time
- Reducing clinician work and mental load

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Initial Key Performance Indicators

KPI	Current	Goal with Eleos	Comments
Engagement Rate	N/A	75% +	Active users / Trained users
Adoption Rate (if available)	N/A	TBD	Eleos sessions/Total sessions
Time to complete a note	15 minutes	50%+ reduction in time	Average time to complete a note If baseline metric is N/A, we use 15–20 min industry average
Time to submit (Lag time/Aging)	TBD	All notes submitted by EOD	From the end of the service provided until the note is submitted
Clinician Satisfaction	N/A	75% +	Percentage of positive note ratings (4+/5 stars)

Best Practices to Drive Success

Communication — Program-wide education, awareness, and go-live planning

Proactive Change MGMT — Close collaboration between Eleos and Clinical Leadership

Continuous Monitoring — Monitoring usage + reporting on our Key Performance Indicators

Collaborative Governance — Executive check ins, Business Reviews and Steering (if needed)

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Group Purchase Terms 🥁

Eleos Investment

Price Per User:
Documentation: $129 Per User Per Month
Compliance: $119 Per User Per Month

Minimum Investment:
$50k annual minimum for each product

Implementation Fee:
$30,000+ one-time fee that is scoped per member.

Users:
Scoped for all applicable users.

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Investment

We need your help with a few more survey responses!

→ **Price Per User:**
Documentation: $74 Per User Per Month
Compliance: $64 Per User Per Month
If member purchases both, they will received 4 months free of Compliance.

→ **Minimum Annual Investment per Member:**
Documentation: $42,000
Compliance: $42,000

→ **Implementation Fee:**
$10,000*

→ **Users:**
Documentation: All applicable users
Compliance: 55 users

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Contract Terms

*Waive Implementation! Sign contract by August 15, 2025

License both products before August 15, 2025 and receive 4 months free of compliance.

2025 Opt-in: Members can sign before December 31, 2025 with a 10% increase on the rates (e.g. $81.40 PUPM for Documentation & $70.40 PUPM for Compliance)

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→ **Payment:** Members pay Eleos directly. Annual upfront and in advance, net 30 upon signature.

→ **Licensing:** 36 month term. Starts on Technical Readiness (first note written in member EHR) for Documentation. And 60 days after contract signature for Compliance.

→ **Contract:** Members will sign the pre-negotiated contract.

→ **Implementation:** Scheduled on a first come first served based upon contract signature

Indiana Council & Eleos

Technology: Eleos can work with any Indiana Council member, but there are slight workflow differences based on the unique technologies that exist across members. Eleos will work with each member to conduct a thorough analysis of their technologies (Product Discovery Meeting) and clearly walk a member through Eleos functionality that will best suit their needs prior to a member signing on with the Indiana Council Group Purchase or Partnership terms.

Future products: Eleos and Indiana Council will agree to revisit Group Purchase and Partnership terms for future Eleos products to the benefit of the Indiana Council members upon product availability.

Indiana Council members who are existing customers of Eleos: Any members of Indiana Council who are current Eleos customers may choose to participate in the Indiana Council negotiated rates. They will sign the new agreement under the Indiana Council and begin a new 36 month agreement with Eleos. Eleos and the member will mutually cancel the previous agreement. Eleos will not refund or reduce their overall investment with Eleos. Any savings incurred by locking in the negotiated group purchase or partnership rates can be applied to additional licenses on Eleos' Documentation not on new products such as prescriber or compliance solutions. Savings cannot be carried over year over year. Any funds not applied in a 12-month period toward additional licenses will be forfeited.

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Return on Investment

❝

The Eleos partnership has helped us provide quality service and improve our numbers—but we also know there are lives attached to them!

Dr. Devon Stanley, DSL, PMP, PMI–ACP, CSEP
Chief Information Officer
Gulf Coast Center

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→ **$942K** increase in annual services revenue*

→ **$767K** annual savings from 5% reduction in turnover*

→ **12x** annual ROI on investment in Eleos*

→ **3-4x** better symptom reduction**

→ **2x** higher client engagement**

Based on Gulf Coast Center (GCC) CCBHC annualized results
**Based on randomized controlled trial (RCT)*

Value of Investment

"

I honestly can't imagine what life would be like without Eleos.

Jace Scott, LCSW
GRAND Mental Health

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70% less time spent on documentation*

80% of audit team time redirected to risky notes*

90% of providers are less stressed**

78% of providers are more likely to stay**

180x faster feedback to providers on note quality*

Average results across Eleos customer base
*** Based on Trilogy case study*

Big Bang Go Live

Network Effects Drive Adoption

When everyone is onboarded at once, you create a shared experience. This generates momentum, makes collaboration easier, and removes friction caused by having "in" and "out" groups. People see their peers using the platform and are more inclined to participate.

Avoid Fragmented Feedback

A pilot can sometimes generate misleading or incomplete data, as a small group may not represent the full diversity of use cases or needs. A full rollout gives you a much clearer picture of actual usage patterns, pain points, and opportunities—allowing us to optimize quickly and accurately.

Build Confidence and Culture Around Change

When adoption is staggered, it can undermine confidence. Some users may delay engagement or wait for "phase 2" before investing time. A company-wide launch sets the tone: this is the direction we're going. It creates a culture of commitment and excitement from day one.

Faster ROI

Rolling out to all users at once maximizes your investment. You start seeing value across your organization immediately, rather than stretching timelines and resource demands over months. This accelerates time-to-value and puts your team ahead of the curve.

Continuous Support

Our onboarding team is fully prepared to support a full launch. We'll ensure the rollout is smooth, the training is comprehensive, and your team feels confident from day one. We only succeed if you're seeing maximum utilization, which is why it's part of our Goals/KPIs from the beginning of the partnership. Your dedicated Eleos team will track who is and who is not using, with personal outreach to folks not using the technology.

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Testimonials

"For those who might be on the fence about adopting Eleos, I would say, don't think twice."
Sherri Romano, Chief Clinical Officer at CCNY

"Eleos keeps staff coming back to work everyday"
Lauren Cohn, CEO of Meridian Healthcare

"I was surprised at how good the (Eleos) training was"
Matt Spencer, COO of Grand Mental Health

Eleos & Jefferson Full Testimonial Video

Why Eleos is Worth the Investment
Hattie Tracey, CEO of Coleman (OH Based)

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Group Purchase Survey

Next Steps

1 **Schedule Workflow Alignment Meeting**
calebd@eleos.health

2 **Save the Date – May 29th** – Ask Eleos anything –
Q&A with Eleos Founders and Technical Experts

3 **Additional Questions,** please email
calebd@eleos.health

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Thank you

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