

JOURNEY

Chief Commercial Officer

Growth Strategy

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EXECUTIVE SUMMARY

Journey is at a pivotal inflection point. At ~\$8M ARR with a Series A behind it, the company has validated its proactive mental health model and now needs to build the commercial engine that scales it to \$25M+ ARR. This document outlines a three-pillar growth strategy designed to do exactly that.

The core thesis: The opportunity is to own the category narrative, win a defensible vertical beachhead, and build the systems that make growth repeatable.

Three Pillars

- **Pillar 1:** Massive Awareness Campaign
- **Pillar 2:** Dental Market Beachhead
- **Pillar 3:** Build the Moat

Each pillar is sequenced intentionally: Awareness earns the right to be in the conversation. The Dental Beachhead proves the model in a high-affinity vertical. The Moat ensures that what we build is difficult to replicate. Pilot fast, learn early, and never stop growing.

THE CATEGORY OPPORTUNITY

Before tactics, context. Journey is not just selling a better EAP. It is defining a new category: proactive mental health care for the modern employer. Category creation requires a clear enemy, a clear hero, and a clear outcome.

The Enemy: Passive, Reactive Mental Health Benefits

The traditional EAP model was designed for a different era.

The Hero: The Proactive Employer

The employers Journey serves don't wait for crisis. They build cultures where people can bring their whole selves to work, where stress is acknowledged before it becomes burnout, and where mental health is treated with the same seriousness as physical health. Journey gives these employers the tools, data, and programming to be that company.

The Outcome: Measurable Impact, Not Just Access

Journey's value proposition must be anchored in outcomes: reduced turnover, improved engagement scores, faster return-to-productivity. Every enterprise sale should include a measurement framework that proves ROI — and becomes a case study for the next sale.

PILLAR 1: MASSIVE AWARENESS CAMPAIGN

HR and Benefits leaders need to know Journey exists, understand what makes it different, and trust it before they will champion it internally. This pillar builds that foundation across three tracks.

Track 1: Thought Leader & Influencer Strategy

Identify and activate credible voices in HR, Benefits, and vertical-specific communities to champion Journey's proactive model.

Content Campaign: The Three-Part Narrative

- Acknowledge the Challenge — Content that validates the mental health crisis in the workplace, using data and human stories. The goal is to make HR leaders feel seen and understood.
- Question the Passive Solution — Provocative content asking: "Is your EAP actually working?" Challenge the 3–6% utilization rate. Surface the gap between having a benefit and delivering real support.
- "How is your team really doing?" — A campaign anchor question that drives engagement. Surveys, LinkedIn polls, podcast prompts, trade publication op-eds. Make Journey the brand that asks the question no one else is asking.

Target Thought Leaders by Segment

- Enterprise HR / Benefits: CHROs and Benefits Directors at companies 500–5,000 employees. Partner with SHRM, WorldatWork, and Benefits leadership communities.
- Dental Vertical: Dr. Kyle Stanley — primary champion. Dr. Martin Mendelson — active co-presenter and mental health advocate.
- Broader Healthcare & Professional Services: Engage voices in Current top performing Verticals.

Track 2: Multi-Channel Distribution

Digital / Social

- LinkedIn — Primary B2B channel. Consistent thought leadership content from Journey leadership + activated champions. Target: HR Directors, Benefits Managers, CHROs, DSO executives.
- Podcast Circuit — Prioritize: The Benefits Podcast, HR Brew, The Dental Marketer, Dental Nachos, The Profitable Dentist, WorkLife with Adam Grant.
- Trade Publications — Becker's HR, Employee Benefit News, Dental Economics, Group Dentistry Now, DSO Bulletin. Submit bylined op-eds from Journey leadership and thought leader partners.

SEO & Site Performance

- Own the Proactive Category: Target keyword clusters — "proactive mental health benefits," "EAP alternative," "employee mental health ROI," "workplace burnout prevention."
- Vertical-Specific Keywords: "dental burnout," "dentist mental health," "DSO employee benefits" — low competition, high intent terms where Journey can rank quickly.
- Content Hub: Build a resource library of research, case studies, and ROI calculators that makes Journey the authoritative destination for proactive mental health education.

Trade Show & Conference Strategy

Prioritize podium presence over booth presence. A speaking slot signals expertise; a booth signals vendor.
Target:

- HR / Benefits: SHRM Annual Conference, WorldatWork Total Rewards, Benefits Forum & Expo
- Dental: ADA Annual Meeting, DSO World Summit, Becker's Future of Dentistry Roundtable, CDA (California Dental Association) — especially relevant given Kyle Stanley's Dental Venture Summit presence in Anaheim.
- National Trade Show Presence by current user priority.

KEY METRIC

Share of voice in target verticals — measured by inbound leads attributing awareness to content/thought leadership within 6 months.

PILLAR 2: DENTAL MARKET BEACHHEAD

The dental industry is not a random target. It is the single highest-conviction vertical entry point available to Journey today — for reasons that are structural, cultural, and personal. Winning dental creates a replicable playbook for every subsequent vertical.

Why Dental — The Market Case

- Mental health crisis is documented and acute: dentists experience depression, burnout, and suicide at rates significantly higher than the general population. Financial stress, professional identity struggles, and patient management pressures are primary drivers.
- DSO consolidation is accelerating: the top 10 DSOs now support roughly 7,800 dental offices combined. These organizations are actively competing for talent — and benefits differentiation is a key recruiting lever.
- The movement already has momentum: Dr. Kyle Stanley's Light Side Academy, the Dental Mental Health Coalition, and the ADA's push toward mandatory mental health CEUs have created a receptive, primed audience.
- Regulatory tailwind: the current push to require 1 CEU of mental health education from the ADA is a policy lever that could make Journey's programming a compliance solution.

Why Dental — The Personal Case

This is not just market analysis. The personal credibility and existing relationships in this vertical are a competitive moat that no other CCO candidate can replicate. Deep ties to the dental industry through SprintRay, Carestream Dental, Norco Valley Dental, and the broader DSO ecosystem create warm doors into every target organization.

Beachhead Activation Plan

Step 1: Establish Mission-Aligned Partnerships

- Dr. Kyle Stanley / Light Side Academy — Formalize a partnership. Co-create content, co-present at dental conferences, explore a branded mental health track for DSO clients. Stanley has 74K+ Instagram followers and is dentistry's most recognized mental health voice.
- Dental Mental Health Coalition (dentalmentalhealth.org) — Establish a formal collaboration. Journey becomes the recommended corporate solution for DSO members seeking proactive mental health support.

- ADA CEU Initiative — Get involved formally in the push to mandate mental health education. Position Journey as the natural programming partner when the mandate passes.

Step 2: Reframe the DSO Value Proposition

The mental health conversation in dental must be framed in DSO executive language — not clinical language.

- Recruiting Angle: "Journey is how you win the talent war." DSOs competing with private practices for incoming dental graduates need differentiated benefits. Journey is a recruiting tool first, a wellness benefit second.
- Retention Angle: "Journey reduces your most expensive cost — turnover." The cost of replacing a dentist is estimated at \$100K–\$250K+ including recruitment, onboarding, and lost production. Reducing burnout-driven attrition by even 10% delivers measurable ROI.
- Culture Angle: "Journey makes your DSO the place people want to work." MB2 Dental, one of the largest DSOs, has already embraced mental health programming publicly. That's the case study. Others will follow.

Step 3: Target DSO Sequencing

Not all DSOs are created equal. Sequence targets by culture fit, size, and likelihood of being a referenceable champion:

- Tier 1 — Quick Wins (Culture-forward, already mental health aware):
 - MB2 Dental — Has publicly hosted Dr. Kyle Stanley for mental health programming. Warm door already exists. ~400+ practices.
 - Pacific Dental Services — Known for employee-focused culture, training investment, and associate development. ~850+ practices.
 - Mortenson Dental Partners — Dentist-owned, values-driven, 150+ practices. Likely receptive to mission-aligned benefits.
- Tier 2 — Scale Targets (Win after proof of concept):
 - Heartland Dental — Largest DSO in the U.S., 1,900+ practices across 39 states. A Heartland win is a market signal.
 - Aspen Dental / TAG — 1,100+ practices, strong retail health model. Benefits standardization at scale.
 - PDS Health — 1,000+ practices in 24 states. Known for operational rigor.

Step 4: Build the Dental Case Study

The first DSO win is not just a customer — it is the proof point that unlocks the rest of the vertical. Structure the first engagement with measurement from day one: pre/post engagement scores, retention data, utilization rates, and testimonials from clinical staff. This becomes the sales asset for every subsequent DSO conversation.

KEY METRIC

First Tier 1 DSO signed within 90 days. Three DSOs under contract within 12 months. Dental vertical representing 25%+ of new ARR by end of Year 1.

PILLAR 3: BUILD THE MOAT

Revenue is the goal. Defensibility is the strategy. This pillar is about building the systems, partnerships, and infrastructure that make Journey's growth repeatable, scalable, and difficult to replicate.

Track 1: Consultant & Broker Influence Strategy

Benefits consultants and brokers are the kingmakers in enterprise EAP decisions. HR leaders don't just buy benefits — they ask their consultants what to buy. Journey must be on every major consultant's preferred vendor shortlist.

Priority Targets

- National: Mercer, Aon, Willis Towers Watson, Gallagher, NFP —
- Regional / Dental-Specific: Benefits brokers who specialize in serving DSO groups and multi-location healthcare employers. These are high-value, warm relationships that can be activated through existing dental industry connections.

Activation Approach

- Host quarterly consultant briefings — educate on Journey's proactive model, share outcomes data, and position as the differentiated alternative to legacy EAPs.
- Build a formal consultant referral program with structured incentives and clear referral tracking.
- Co-present with consultant partners at HR conferences to reinforce credibility and shared authority.

Track 2: Revenue Share & Strategic Alliances

Strategic alliances can generate qualified pipeline without proportional sales headcount. Target partners whose existing relationships with HR, Benefits, and DSO executives make Journey a natural add-on.

Priority Alliance Categories

- DSO Technology Platforms: Denticon, Eaglesoft, Dentrix — practice management platforms used by thousands of practices. A Journey integration or co-marketing agreement puts the brand in front of every DSO operator who uses these tools.
- HR & Benefits Technology: ADP, Workday, Rippling — HRIS platforms where Journey as an embedded or preferred wellness partner creates distribution at scale.

Track 3: Commercial Operating System

The commercial operating system needs to be built. This is the infrastructure that turns individual sales effort into a predictable revenue engine.

Pipeline Management & Forecasting

- Implement disciplined pipeline stages with clear entry/exit criteria
- Weekly pipeline reviews with consistent metrics: number of active opportunities, average deal size, stage conversion rates, days-to-close by segment.
- Forecasting cadence: 30/60/90-day rolling forecast updated weekly, reviewed monthly with CEO.

Account Prioritization Framework

- Tier accounts by: company size (500–5,000 employee sweet spot), vertical affinity (dental first, then adjacent healthcare and professional services), and buyer readiness (active evaluation vs. awareness stage).
- Assign dedicated coverage to Tier 1 accounts. Use scaled outreach (sequences, content) for Tier 2 and 3.

Keep the Sellers Selling: AI-Enabled Efficiency

The fastest way to scale revenue per head is to eliminate non-selling activity from seller time. Autonomous AI agents should handle:

- Follow-up sequences — automated, personalized outreach between touchpoints
- Meeting scheduling and confirmation — eliminate back-and-forth coordination
- Proposal and deck generation — templated but customizable first drafts
- CRM data entry and activity logging — sellers log calls, AI updates the record
- Renewal and expansion outreach — trigger-based campaigns for existing accounts

Track 4: Right-Size the Commercial Organization

At \$8M ARR, Journey does not need a large commercial team. It needs the right team — focused, metrics-driven, and structured to scale toward \$25M+ without adding headcount proportionally.

Commercial Team Architecture (Year 1 Target)

- CCO (this role) — Player-coach. Personally involved in top enterprise opportunities while building team and system.
- 2–3 Enterprise Account Executives — Focused exclusively on new logo acquisition in target segments. Clear quota, clear territory, clear ICP.
- 1 Consultant Relations Lead — Dedicated to broker/consultant relationships nationally. This is a distinct skill set from direct sales.
- Marketing Lead — Demand generation, content, thought leadership, and sales enablement tightly aligned to commercial priorities.
- 1 Revenue Operations / Sales Enablement — The system builder. Owns CRM, pipeline data, forecasting infrastructure, and onboarding.

KEY METRIC

Pipeline coverage ratio of 3x quota at all times. Average enterprise deal size increasing quarter-over-quarter. New logo ARR on track for \$8M → \$25M trajectory by end of Year 2.

SUCCESS METRICS DASHBOARD

A growth strategy without measurement is a wish list. The following KPIs govern each pillar and create accountability across the commercial organization.

PILLAR	90-DAY TARGET	12-MONTH TARGET
Awareness	Thought leader partnerships signed (3+); SEO keyword rankings improving MoM	Inbound pipeline from content: 20%+ of total; Share of voice in dental + HR verticals measurable
Dental Beachhead	First Tier 1 DSO signed; Kyle Stanley partnership formalized	3 DSOs under contract; Dental = 25%+ of new ARR; First case study published
Consultant Relations	25 consultant briefings conducted; 5 referral agreements in place	Consultant-sourced pipeline = 15%+ of total; Journey on 3+ preferred vendor lists
Commercial OS	CRM configured; pipeline stages defined; AI tools deployed for seller efficiency	Pipeline coverage at 3x quota; forecast accuracy within 15%; avg deal size growing QoQ

Revenue	\$2M+ in new ARR closed	\$17M+ ARR (from \$8M base); path to \$25M clear
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90-DAY ACTION PLAN

The first 90 days are about establishing credibility, activating relationships, and closing the first proof-of-concept deals. Speed matters. Here is the prioritized action sequence:

Days 1–30: Listen, Learn, Align

- Deep-dive with CEO, product, and existing customers — understand what's working, what's not, and where the biggest friction is in the current sales motion.
- Audit the existing commercial infrastructure: CRM quality, pipeline health, current broker/consultant relationships, and marketing effectiveness.
- Initiate outreach to Dr. Kyle Stanley and Dental Mental Health Coalition — begin partnership conversations.
- Map the top 10 target DSOs with existing relationship inventory and warmth assessment.
- Begin building category narrative framework with marketing — the "enemy," the hero, the outcome.

Days 31–60: Activate & Build

- Formalize first thought leader partnership (Kyle Stanley or equivalent).
- Launch initial dental vertical outreach — leverage existing SprintRay/Carestream relationships for warm introductions to DSO executives.
- Submit speaking proposals for ADA Annual, DSO World Summit, and Becker's Future of Dentistry.
- Stand up commercial operating system: pipeline stages, forecasting cadence, AI efficiency tools.
- Host first consultant briefing — start building Journey's presence in the broker/consultant community.

Days 61–90: Close & Prove

- Close first Tier 1 DSO pilot — structure it with a measurement framework from day one.
- Publish first piece of Journey category content with thought leader co-authorship.
- Present 90-day review to CEO with pipeline health, early wins, and refined 12-month commercial plan.
- Begin building dental case study from first DSO engagement.
- Identify and close first 2–3 non-dental enterprise accounts to diversify the pipeline proof of concept.

Pilot Fast. Learn Early. Never Stop Growing.

Journey has the model, the mission, and the moment. This strategy is how we build the engine that scales it.