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Patient Coaching Guide

Welcome!

Hello and welcome to CoCoPay – part of the ConnectionPoint Systems Inc. platform family. We're happy to partner with medical clinics and device manufacturers to bring you or your loved one the quality care and treatment they deserve.

Once you have received your campaign, whether by registration or directly from your clinic/device manufacturer, it's time to customize and make it your own.

The recommendations provided in this guide are just that: recommendations. Ultimately, you decide what information and media to put on your campaign. However, as we here at CoCoPay have over 14 years of crowdfunding knowledge, we hope you take the time to carefully consider the suggestions we have for you.

Yours in success,

The CoCoPay Team

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**Part of the
ConnectionPoint family**

Getting Started

Whether you have registered for a campaign on your clinic/device manufacturer's CoCoPay platform, or received your campaign template link directly from them, your first goal is to take a deep breath and feel confident that the support you need is there. At anytime, please feel free to email CoCoPay at **support@cocopay.co** with questions, concerns, or even to discuss fears and hesitations. We strive to provide a warm, inclusive, and judgement-free environment for all our users.

Now, let's get your campaign up and running!

1. Gather your team

If you haven't already done so, we highly recommend reaching out to close friends and family members who may be keen to assist you in customizing and running this campaign while you focus on your health and wellbeing. CoCoPay is designed for 'teams' of individuals to work together to develop and share these campaigns to drive success. This is not mandatory, of course; but we do find that success coordinates well with help from our loved ones.

Invite people to your campaign by choosing 'Team' in the sidebar menu of your campaign:
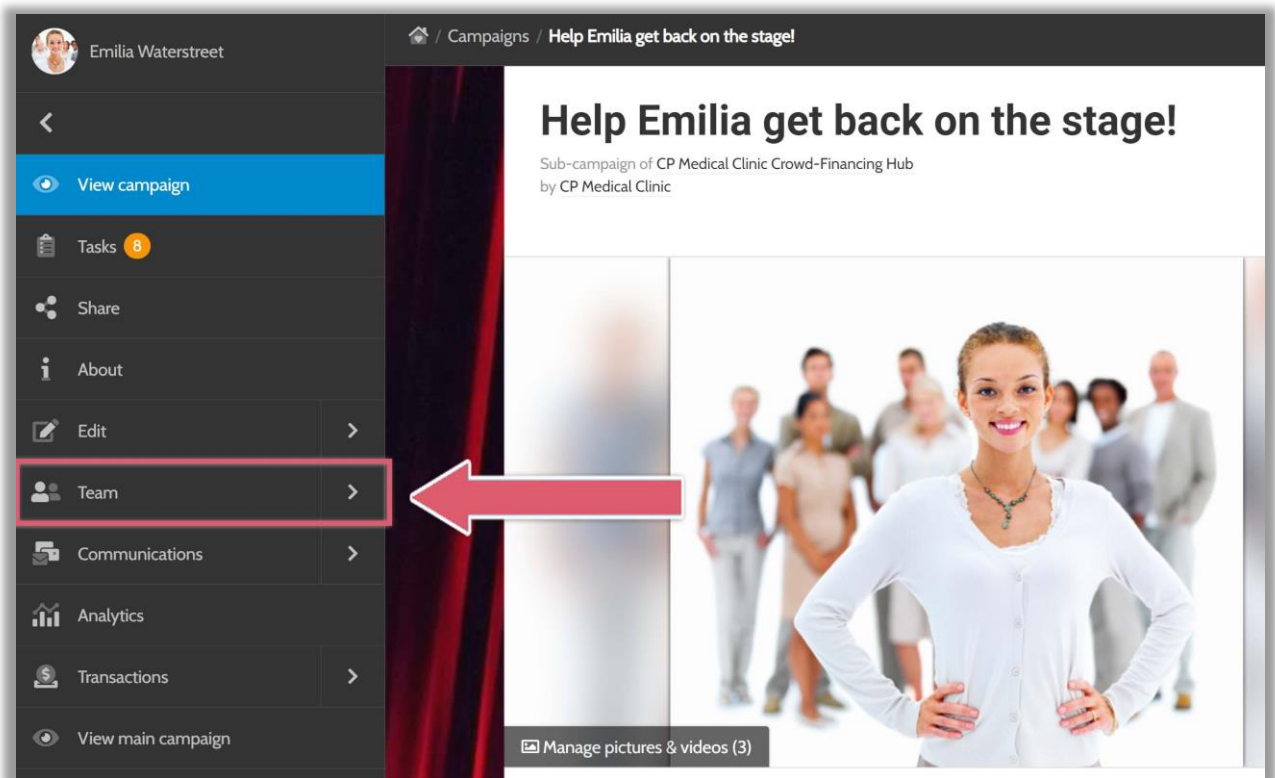
Then, click 'Invite team members' (1) to enter emails of those you wish to help you with this campaign. You don't have to give up full control of the campaign if you don't wish to. Check out the Roles & permissions (2) to see which role you may want to give each member (this is changeable!).
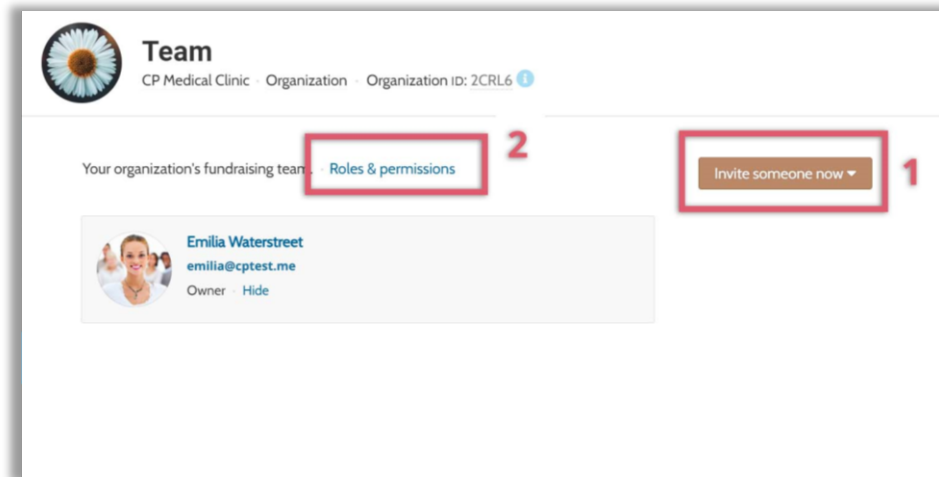
2. Endorsement message

When you share a CoCoPay campaign from your user account, the platform attaches a 'reference code' to the URL, identifying the person sharing it. Then, when someone clicks on the link you shared, they are welcomed with an 'Endorsement banner.' This way, if the person sharing the campaign is not the beneficiary (i.e., who the campaign story is all about), the viewer can associate their friend with the purpose of the campaign, if they are unfamiliar with the beneficiary.
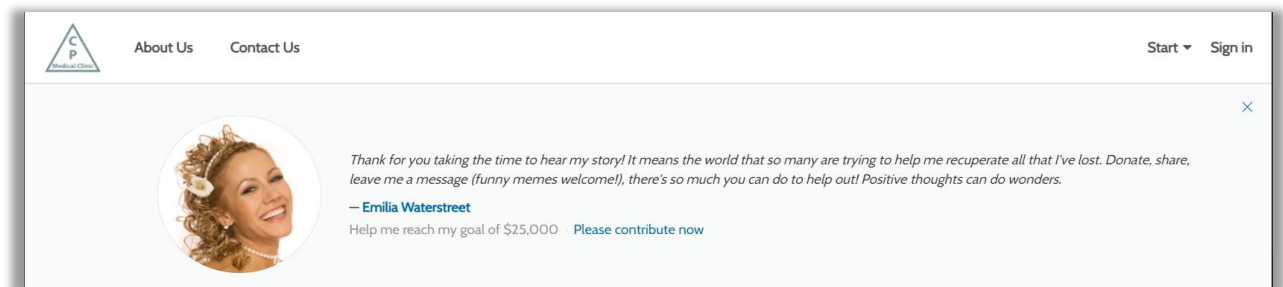
No matter who is helping run the campaign – friends, family, etc. – or if you are running it for yourself, anyone on the campaign team can customize this endorsement message.

Welcome the reader and add a line or two summarizing why they should see this campaign. Record a video (a candid one from a mobile device is encouraged!) to really enforce the message.

To edit this message, click 'Team' in the sidebar menu of the campaign, then 'Personal message' (1). Write your message in the space provided (2), and record/upload a video if you wish (3). Providing a personal goal is not necessary, you may leave this blank.

Don't forget to Save (4)!

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3. Personal story

Your story (or the beneficiary's story, if you're helping your loved one) is what drives contributions. At the bottom will be a templated story from the clinic/device manufacturer you've registered under, but there is a section for you to fill out this crucial part.
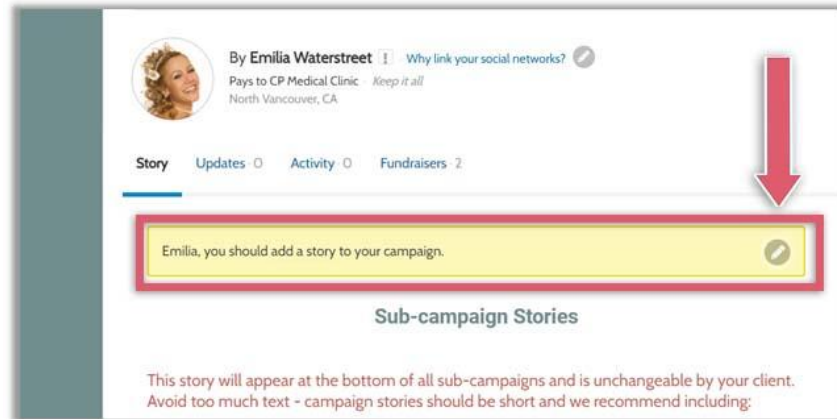
Here are some questions to think about when writing this story:

- What are some things you love that you can't do/can no longer do because of this condition or injury?
- What does your life look like to you if you imagine it without this condition/injury?
- Tell us about your life and home – family/kids/pets/friends/interests/etc. (as in, who are you *outside* of this medical condition).
- Describe your emotions when you think about receiving these funds.

Pictures and videos are also important tools to utilize. Good media to include are not only ones showing the medical side of the campaign – but happy, positive media showing yourself smiling with friends and family, doing what you love.

Visual appeal also matters. Black text on a white screen can be off-putting and appear inauthentic (and a bit hard to read!). Try to use different fonts and colors and be creative in making an interesting-to-read campaign.

Lastly, don't forget **you do not have to include information you don't want to.** A common misunderstanding of medical crowdfunding is that you have to dive into the specific and personal details of the medical situation (and show pictures of yourself at your most vulnerable) in order to be successful.

We have seen time and again the falsehood in this. What creates a successful campaign is the emotional appeal – the *end result* and the life you wish to live. So never include information, pictures, or videos that make you (or your loved one) uncomfortable.

4. Media gallery

Don't overflow the story with media – keep it short and powerful. The media gallery is also a great place to upload photos or videos that don't fit into the story. You can even make a slideshow out of them!
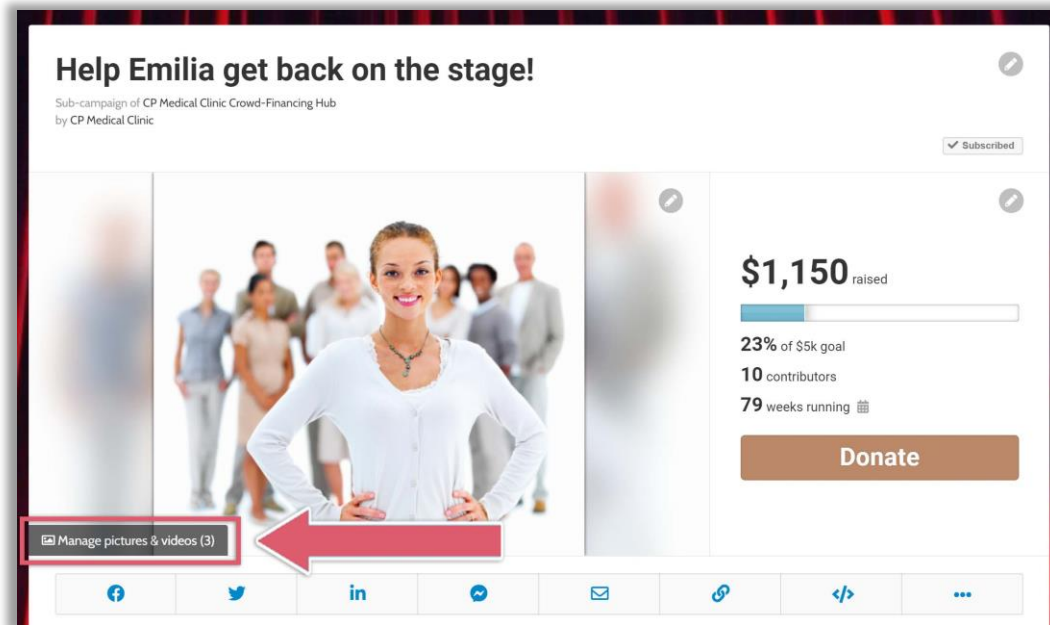

IMPORTANT: Consider a 'campaign video.'

One of the best ways to drive success in a medical crowdfunding campaign is to create a campaign video. This is ideally with the beneficiary, but coming from the support team is powerful too if the beneficiary is unable.

This does not have to be long or professionally done. A 1–2-minute video of you speaking the main points of the story is a fantastic way for your supporters to connect with you. Words on a screen don't necessarily showcase your personality – videos can. Our advice is to go outside that has natural lighting and a neutral (not busy) background and is quiet. Record it a few times if that's what it takes to get comfortable. Post the video to your media gallery as the "Campaign video," and the platform will put a 'play' button on your cover image.

5.   Change the background photo/colour

Show some of your personality through the background! If you're using an image, make sure to follow the recommended size guidelines or else it'll appear blurry.
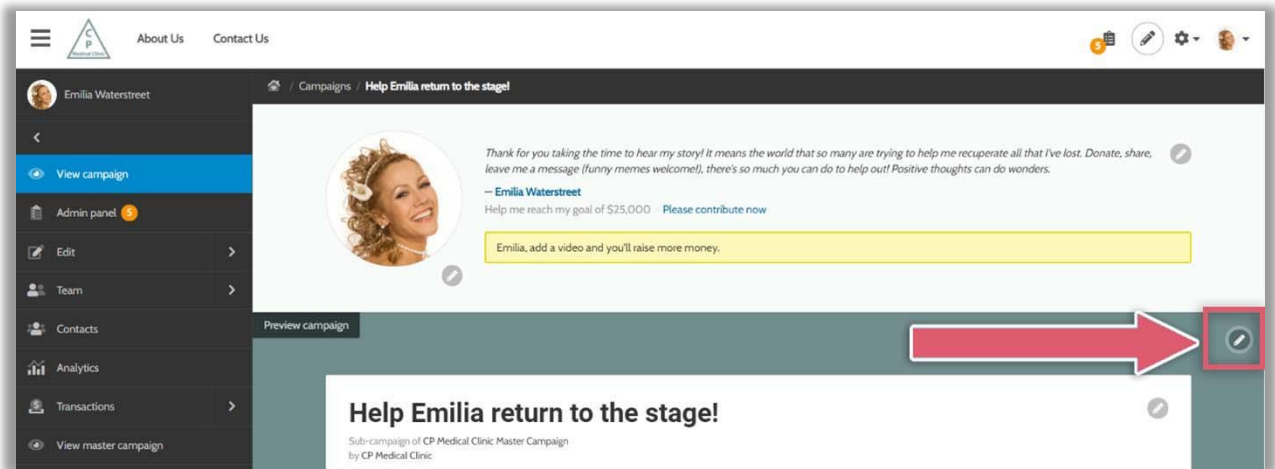
6.   Campaign privacy

All campaigns on CoCoPay are automatically indexed onto our homepage and search engines once they have launched. This means someone can find your campaign via searching on a search engine (Google, Bing, DuckDuckGo, etc.) as well as the CoCoPay site.

If you do NOT wish for this, you may change the privacy by clicking 'Edit' in the sidebar menu of your campaign, then 'Privacy.' Uncheck the boxes under **Search** to remove these abilities:
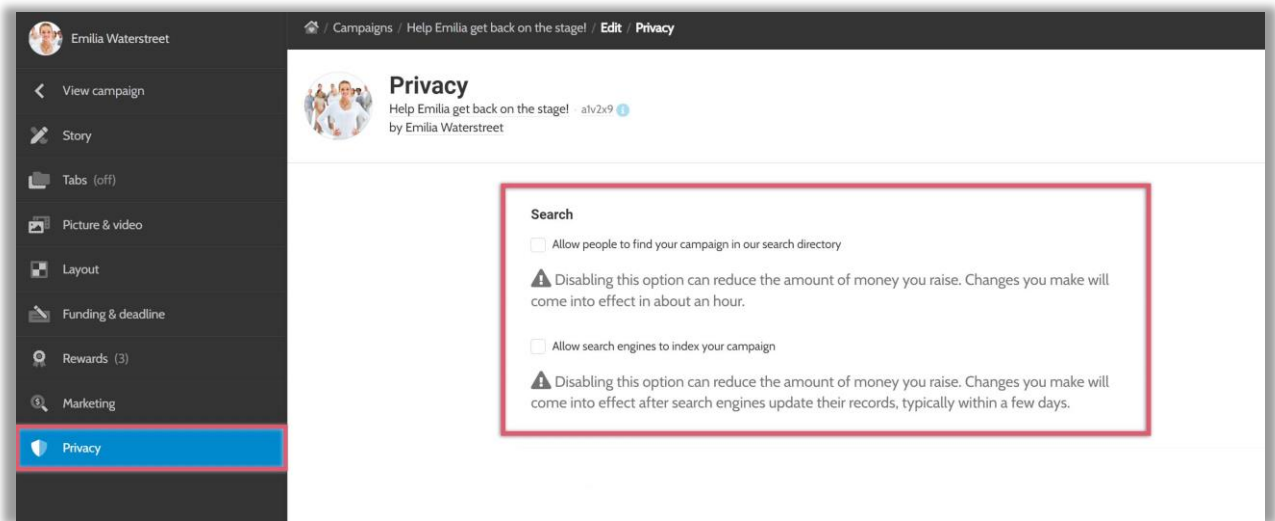
7. Sharing the campaign

Crowdfunding is all about sharing. That is why it is an important part of the story to ask for the share as well as the financial contribution *if you are comfortable with it*.

Again, this if your campaign, please do what makes you comfortable. If you are comfortable with it, encourage visitors to the campaign to explore the share bar under the gallery image and help get word underway, further increasing your chances of success.

8. Ready to launch!

Once you are ready to go, the number 1 thing to focus on is getting that goal meter off '0' as quick as possible. Supporters are encouraged by others contributing first. As soon as the campaign launches, send a private message (email, text, WhatsApp, etc.) to those people you **know** will contribute, asking them to do so immediately. It has been shown that campaigns receiving contributions right at the start are more likely be successful.

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Resources

We're here to help! Explore these resources for worksheets, articles, or one-on-one help from the team at CoCoPay:

- Fundraiser HUB – **connectionpoint.com/fundraiserhub**

- Email support – **support@cocopay.co**

- Live Discord chat (you can privately message if you like!) - **https://discord.gg/4hKZWgP8**

We wish you strength and success in your healthcare journey