



# MDisrupt Series A

## Frequently Asked Questions

This document provides a concise overview of MDisrupt's investment highlights, offering investors a clear perspective on the company's strategy, market opportunity, traction, differentiation, financial performance, and Series A funding plan.

### 1. Company & Vision

**Q: What is MDisrupt's mission and why was it founded?**

A: MDisrupt's mission is to accelerate the adoption of impactful health innovations by connecting healthtech companies with the right experts and by building the critical infrastructure to evaluate and scale healthcare products. We connect healthtech innovators with vetted clinicians, scientists, operators, and regulators — and increasingly use AI + proprietary data to deliver objective performance insights

**Q: What unique problem are you solving, and why now?**

A: The pace of health innovation is accelerating, but most healthtech companies struggle to navigate clinical validation, regulatory requirements, and go-to-market strategies. At the same time, healthcare stakeholders face *vendor fatigue* and lack trusted ways to evaluate new technologies. Meanwhile, 98% of digital health products and 75% of devices fail to scale. MDisrupt bridges this gap with a platform that combines expert intelligence, AI, and proprietary data to validate innovation, reduce risk, and accelerate adoption.

### 2. Market Opportunity

**Q: How big is the total addressable market (TAM)?**

A: Our TAM is \$42B globally, spanning validation, evaluation, and expert services. In the U.S., our SAM is ~\$5B (health systems, payors, healthtech) and our SOM within 5 years is ~\$123M

**Q: What are the major industry trends driving your growth?**

A: Several macro shifts are accelerating demand for MDisrupt's platform:



- Vendor Fatigue: Health systems and payors are overwhelmed by digital health point solutions, needing trusted evaluation and curation.
- Outcomes-Driven Evaluation: Purchasers demand ROI, clinical validation, and real-world outcomes before adoption.
- Rise of Fractional Work & Health Gig Economy: Clinicians, scientists, and operators increasingly seek flexible, project-based, or portfolio careers. MDisrupt unlocks this supply of expertise, aligning with the broader gig economy trend.
- AI + Data Integration: Generative AI enables scalable aggregation of expert and clinical insights, but requires high-quality, domain-specific data — which MDisrupt uniquely provides.
- Market Validation: Initiatives like Peterson HTI demonstrate clear demand for structured, trusted evaluations, while reinforcing the differentiation of MDisrupt's expert-led, data-powered model.

**Q: Who are your top competitors, and why will MDisrupt win?**

A: Alternatives today include:

- Consulting firms (McKinsey, Bain) that are expensive, slow, and not scalable.
- Expert networks (GLG, AlphaSights) that are horizontal, not healthcare-specialized.
- Generic marketplaces (Toptal, Catalant) that connect talent but lack regulatory rigor, validation, and healthcare trust.

Why MDisrupt Will Win:

At MDisrupt, we are building moats that no other company in this space can replicate:

- Owned Expert Marketplace: 3,000+ contracted healthcare experts form a trusted, growing community that delivers immediate scale, credibility, and revenue.
- AI + Human Intelligence Platform: We uniquely combine AI with deep clinical expertise to deliver scalable, evidence-based assessments that can't be matched by AI-only platforms.
- AHA Investment & Collaboration: Backing from the American Heart Association provides unmatched validation and direct access to cardiology and neurology communities.
- Breadth of Clinical Expertise: Coverage across every major specialty enables insights no single-domain network can provide.



- Productized Health Gig Economy: We've built the operating system for engaging healthcare experts — transforming clinical knowledge into an on-demand, scalable, repeatable model.
- Proprietary Data Asset: Each engagement generates valuable product and company insights, creating a growing, defensible dataset that compounds network effects over time.

#### Evolving Beyond a Marketplace:

Today, MDisrupt sits in the expert marketplace category, similar to Catalant, Toptal, or GLG. That's where we started — connecting healthtech companies with the experts they need. But marketplaces alone don't solve healthcare's biggest problem: there is no trusted infrastructure to evaluate products at scale.

As we layer in proprietary data, AI agents, and structured evaluations, MDisrupt evolves from a marketplace into a health data and infrastructure play — more akin to Flatiron Health or Komodo Health. The difference is that we combine both:

- The scalability of a marketplace
- With the defensibility of a real-world evidence platform

This combination positions MDisrupt to define a new category — the critical infrastructure for evaluating and scaling health innovation.

### 3. Product & Technology

#### **Q: What is your core product offering today and what's on the roadmap?**

A: Today, MDisrupt Delivers

- Expert Marketplace: On-demand and fractional experts across clinical, regulatory, commercial, and R&D.
- Health Expert Hourly: Credit-based hourly consulting.

On the roadmap, MDisrupt is building the infrastructure to solve this problem at scale:

- Data Layer (in development): Aggregates proprietary and licensed data, and combines it with expert intelligence from more than 3,000 vetted healthcare experts who review, contextualize, and validate health products for real-world relevance.
- Agentic AI Layer (roadmap): AI agents that aggregate evidence, generate expert recommendations, track regulatory signals, benchmark against



standards of care, and continuously monitor real-world performance. This layer enables us to scale expert judgment across 350,000+ health products.

- User Interface Layer (future): A Recommendation Engine — the buyer-facing experience that translates data + expert insights into clear, evidence-based performance reports that empower payors, health systems, and employers to make confident purchasing decisions.
- Enterprise Subscriptions: Annual contracts (\$250K–\$500K) for payors, health systems, and employers, providing ongoing access to structured performance insights, benchmarks, and evaluations.

Together, these layers form the trusted infrastructure the healthcare market has been missing — combining expert knowledge, proprietary data, and AI to accelerate adoption of impactful health innovations.

**Q: What makes your platform defensible and scalable?**

A: Our defensibility comes from:

- Network effects (more experts → more clients → more proprietary data).
- Proprietary expert-performance dataset creating long-term defensibility.
- Built-for-healthcare trust layer (vetting, compliance, contracts).
- AI Agents for aggregation, benchmarking, regulatory intelligence

## 4. Traction & Customers

**Q: How many clients and experts are active on the platform?**

A: As of August 2025, we have 3,000+ vetted experts and have served 150+ healthtech and life sciences clients

**Q: What is your average ACV and retention rate?**

A:

- Average Contract Value (ACV): ~\$38K (blended across all clients), with repeat buyers averaging ~\$65K in lifetime value.
- Retention: 53% of clients are repeat buyers, who deliver 2x higher LTV and drive the strongest unit economics.
- LTV:CAC Efficiency: Blended LTV:CAC is 4.7x, increasing to 8.0x for repeat clients, demonstrating exceptional retention and expansion potential.
- Annual Recurring Revenue (ARR): \$1.28M as of June 2025, representing 206% YoY growth.

**Q: Can you share examples of marquee customers or partnerships?**



A:

- American Heart Association (Investor & Strategic Partner): In 2024, AHA Ventures invested \$1M and entered a service agreement with MDisrupt. Through this collaboration, we are co-developing a platform to connect innovators with AHA's cardiology and neurology experts — one of the most influential healthcare networks in the U.S.
- Evidation Health (Enterprise Customer): To date in 2025, MDisrupt has booked more than \$790K in revenue with Evidation. They leverage our experts to power real-world studies for leading FAANG companies while reducing their internal burn through fractional models.
- Diagnostics & Healthtech Startups: A growing roster of early- and growth-stage clients across digital health, diagnostics, and life sciences, who rely on MDisrupt to accelerate commercialization, validate clinical pathways, and secure regulatory traction.

## 5. Business Model & Monetization

### **Q: How does MDisrupt make money?**

A: Revenue streams include:

- Platform Access Fees
- Take Rate for Expert Services
- High Margin transaction Fees From Hourly calls
- Placement fees from FTE hiring

Future will open new lines of revenue including

- Future Enterprise Subscriptions: Health systems, payors, employers (\$250K–\$500K)
- Future Vendor Subscriptions: Product assessments, insights, benchmarking.
- Future Services: Predictive analytics, implementation support

### **Q: How do you plan to scale revenue over the next 12–24 months?**

A: Focus areas:

- Expansion of sales team and BD Team
- Performance Marketing
- Scaling Health Expert Hourly platform adoption
- Leveraging AHA partnership to deepen client pipeline
- Converting pipeline into high-ACV recurring contracts

### **Q: Do you issue 1099s to experts?**



A: Yes. All experts are classified as 1099 contractors. 1099s are issued annually for any expert who completes engagements in a fiscal year.

## 6. Financials & Fundraising

### **Q: What's your fundraising history and current status?**

A: Funding to date includes:

- Pre-Seed SAFEs: \$2.4M
- Priced Seed Round: \$2.85M (with SAFE conversions)
- Seed Extension: \$2.0M
- Investors include: AHA Ventures, The Venture Collective, BDEV Ventures, Geek Ventures, Suncoast, Growth Factory, HIP, Zane, Capita3

### **Q: How much are you raising in Series A, and how will funds be used?**

A: 10M Series A to scale client acquisition, expand expert/data infrastructure, enhance platform automation, and grow the team.

Target runway: 24 months, milestone: Data product + payor validation, revenue goal: \$38M booked revenue by 2027

## 7. Team & Operations

### **Q: Who are the key leadership team members?**

A:

- Ruby Gadelrab: Founder & CEO (Invitae, 23andMe, Affymetrix)
- Greg Nagy: COO (Drawbridge Health, Topcon, Amgen)
- Roger Davies: CTO (Sensely, Nuco, Johnson & Johnson)

### **Q: Are there any open leadership or critical roles to be filled?**

A: Yes. We will be building out sales and commercial leadership and data science/AI engineering teams.

## 8. Legal & Risk

### **Q: Are there any pending lawsuits or regulatory issues?**

A: No, there are currently no active lawsuits or regulatory actions against MDisrupt.

### **Q: What insurance policies are in place?**

A: Directors & Officers (D&O), Professional Liability (Expert Coverage) and General Liability.



## 9. Exit Strategy

**Q: What is MDisrupt's long-term vision for liquidity?**

A: We see two primary paths:

- Strategic Acquisition Path: \$30–50M revenue, positioning for acquisition by healthtech, SaaS, or data platforms.
- IPO Path: Expanded enterprise base, proprietary dataset, SaaS-like ARR growth.

**Q: Have you had M&A interest already?**

A: Early conversations indicate strong interest, particularly from marketplace, data and real-world evidence platforms.

**Q: Which types of strategic acquirers might be a fit?**

A: Potential acquirers include health data networks (Datavant, HealthVerity), real-world evidence platforms (Flatiron, Komodo), and SaaS/market intelligence platforms (Veeva, Definitive Healthcare)

Also potentially a Payor - For example Optum acquired the Advisory Board and also is building its own evidence engine.

## Contact Information

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