

The answer

Sample idea: practice-management software for Canadian physiotherapy clinics

Illustrative sample on a sample idea, not a client • 13 October 2026 • four pages condensed from a 70-page report

THE VERDICT

A real market, and a small one. Enter Ontario, sell the billing rails, and do not raise venture money on Canada alone.

- S Situation**

Canada has 4,921 offices of physiotherapists, occupational therapists and audiologists with employees (December 2023); 74% have fewer than 10 employees. In 2024, 21,683 physiotherapists worked in direct patient care.
- Q Question**

Where is the addressable market, which gap can a new entrant close, and what is it worth?

- C Complication**

Every vendor we profiled sells booking, charting and billing. The difference is getting paid. TELUS eClaims, HCAI (Ontario auto insurance), WSIB and OHIP are separate rails, and Jane App's own guide says WSIB in Ontario "is different than Telus eClaims which we are integrated with."
- A Answer**

The physiotherapy market is about US\$6.9M a year, and the slice a new entrant can reach is about US\$2.0M. The gap is a web product that covers all four rails at a published price.

THE MISTAKE THIS AVOIDS

Raising venture capital on a Canada-only physiotherapy plan. The reachable market is US\$2.0M (US\$1.4M to US\$2.6M), and the base case earns US\$397,600 in Year 5. Growth has to come from adjacent allied health — chiropractic and massage therapy, for example.

THE DECISION

Start with Ontario clinics of two to five practitioners that bill HCAI, WSIB and private insurers. Ontario holds 1,970 of the 4,921 offices (40%). Lead with migration — published import paths from the incumbents, claims handling in the entry tier, one published price.

US\$33.3M Total addressable market (TAM), all allied-health offices	US\$6.9M Physiotherapy offices only	US\$2.0M Serviceable available market (SAM)	US\$28,000 Year 1, base case: 20 clinics
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Sources: Statistics Canada, Table 33-10-0806-01 (Dec 2023); CIHI, Physiotherapists (2024 data); ISED Canadian Industry Statistics, NAICS 6213 (2025 data); Jane App, insurer-portal guide. Market values: Sagentix calculations, page 3. Adapted from Statistics Canada, Canadian Business Counts, with employees, December 2023 (Table 33-10-0806-01), and Statistics Canada special tabulation published in ISED Canadian Industry Statistics (2025 data). This does not constitute an endorsement by Statistics Canada of this product.

Where the money is gated

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Each mark comes from the vendor’s own pricing or billing page, read on 13 October 2026. An empty circle means no integration is listed on the pages we read; the clinic then files through the payer’s own portal or by hand.

Vendor	Entry price, as published	eClaims	HCAI	WSIB	OHIP	Note
Jane App	CAD \$59/mo (Balance)					Insurance Billing add-on, CAD \$20/mo; no open API
Noterro	\$33/mo (Core)					eClaims on the Max plan, \$77/mo
ClinicSense	USD \$39/mo (Lite)					eClaims from the Standard plan, USD \$69/mo
Juvonno	USD \$49/location/mo, yearly					eClaims from Grow; HCAI and OHIP add-on, USD \$99/mo
Embodia	\$45/practitioner/mo					Price of the practice-management tier
Antibex Universal Office	\$75/mo (1 connection)					Every package includes all features
Practice Perfect	\$53/user/mo, 3 minimum					Windows-based; web rebuild trials expected early 2027
Clinicmaster	Not published					Pricing page returns 404; integrations listed
The Clinic	Not published					eClaims built but gated; OHIP pending; no HCAI or WSIB

Integration in the plan price Higher tier or paid add-on No integration listed

THE MAP IN FOUR BOXES

	Publishes a price	No published price
Lists all four rails	Practice Perfect	Clinicmaster
Leaves out a rail or charges extra	Six vendors	The Clinic

WHAT THE MAP SHOWS

Two of nine vendors list all four rails. Clinicmaster publishes no price. Practice Perfect publishes \$53 per user a month on its Canada tab (three users minimum), but its maker says the product “has never been ‘fully-web’” and expects limited trials of a web rebuild in early 2027. The six other vendors with a published price leave out a rail or charge more for it. The opening is narrow and specific — a web product with all four rails at one published price.

WHAT A NEW VENDOR MUST CLEAR

HCAI requires every software vendor to sign a non-disclosure agreement before it integrates. In June 2026, Practice Perfect told its users that version R669 or later was required to submit OCF-18, OCF-21 and OCF-23 forms to HCAI after 1 July 2026 — a forced update, and a moment when clinics compare vendors.

Sources: vendor pricing and billing pages read 13 Oct 2026 (jane.app, noterro.com, clinicsense.com, juvonno.com, embodiaapp.com, antibex.com, practiceperfectemr.com, clinicmaster.com, the-clinic.net); HCAI, PMS vendor integration page; Practice Perfect, HCAI update notice (24 Jun 2026) and rebuild notice. Currency as each vendor states it; “\$” where the page does not say.

What the market is worth

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THE CEILING (TAM)

23,814 allied-health offices with employees (NAICS 6213, 2025) × US\$1,400 a year = US\$33.3M. This is the theoretical maximum — every office of every discipline buying, with no access filter applied.

FROM PHYSIOTHERAPY OFFICES TO THE REACHABLE MARKET (SAM)



THE ONE NUMBER TO TEST: US\$1,400 PER CLINIC PER YEAR

A Sagentix assumption: a three-practitioner clinic on a mid-tier plan pays about CAD \$1,908 a year, or US\$1,393 at 0.73, rounded to US\$1,400. Published one-practitioner base plans run from \$33 to CAD \$99 a month. At US\$1,000 the SAM is US\$1.42M; at US\$1,800 it is US\$2.56M.

WHAT A NEW ENTRANT CAN WIN (SOM, BASE CASE)

Year	Clinics	Share of 1,420	Revenue
1	20	1.4%	US\$28,000
2	65	4.6%	US\$91,000
3	121	8.5%	US\$169,400
4	195	13.7%	US\$273,000
5	284	20.0%	US\$397,600

CROSS-CHECK BY A SECOND METHOD

Jane App’s co-founder put its recurring revenue at \$100 million (October 2024), and Jane counts more than 240,000 practitioners: about \$417 each. Read as Canadian dollars across 21,683 physiotherapists, that is US\$6.6M — within 5% of the US\$6.9M built from office counts.

Sources: ISED Canadian Industry Statistics, NAICS 6213; Statistics Canada, Table 33-10-0806-01; CIHI; Noterro and Jane App pricing pages; BetaKit (May 2025); Jane App, “Who’s using Jane”. Assumptions, SAM, SOM and the cross-check: Sagentix calculations (Sagentix Phase 01 Market Intelligence, 2026). Adapted from Statistics Canada, Canadian Business Counts, with employees, December 2023 (Table 33-10-0806-01), and Statistics Canada special tabulation published in ISED Canadian Industry Statistics (2025 data). This does not constitute an endorsement by Statistics Canada of this product.

What to do in the next 90 days

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DAYS 1–30 • PROVE THE PAYER PATH	DAYS 31–60 • PROVE THE PRODUCT	DAYS 61–90 • PROVE THE MOTION
• Sign the HCAI vendor NDA; request the vendor package • Start TELUS eClaims vendor registration • Interview 15 Ontario clinics of two to five practitioners • Run a price test with the same 15 clinics GO / NO-GO: at least 6 of 15 rank claims handling in their top three software problems, and 3 name a reason to switch. If not, stop at about CAD \$10,000 spent.	• Ship booking, charting and billing with eClaims in the base tier • Build and test the import from Jane App and Noterro • Publish the coverage map and the price page • Recruit five design-partner clinics GO / NO-GO: at least 5 clinics onboarded and 2 filing real claims.	• Put HCAI into production • Launch the migration offer publicly • Line up five clinics willing to take a reference call • Decide which adjacent discipline comes next GO / NO-GO: 10 paying clinics, 2 payer rails live, and a price that converts.

THE THREE RISKS THAT DECIDE IT

- The market is too small for venture funding.**
Underwrite at US\$2.0M SAM and US\$28,000 in Year 1; plan the adjacent disciplines as the growth case.
- A payer rail stalls.**
Sequence the rails so no single one carries the product, and keep a manual fallback for each. If neither TELUS eClaims nor HCAI completes, the SAM falls to about US\$0.76M.
- Jane App opens its API or cuts its price.**
Jane says it has no open API and no plans for one. If that changes, compete on depth: per-payer validation and rejection-rate reporting.

HOW THE EVIDENCE WAS HANDLED

Counted	Office and workforce counts from Statistics Canada, ISED and CIHI; prices from each vendor’s own page, read on 13 October 2026.
Refused	Syndicated global “physical therapy software” market sizes — not Canadian and not traceable to a primary count. Review-site ratings: the sites blocked automated reading, so none is used.
Where it stops	No Canadian survey of clinic software adoption exists, and the office count dates from December 2023. Both are named as open questions in the full report.

THE FULL PHASE 1 70 pages; a full reference list; competitor profiles with prices; sizing with sensitivity tables; Porter’s five forces rated for each buyer segment; a 12-risk register and the 90-day plan. Reviewed by a CMC-certified consultant before delivery — in 5 to 7 business days.	CA\$4,500 • money-back guarantee, subject to the terms at sagentix.ca/terms sagentix.ca/go-to-market
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Sources: HCAI, PMS vendor integration page; Jane App, Integrations Hub FAQ. Gates, budget and SAM downside: Sagentix calculations (Sagentix Phase 01 Market Intelligence, 2026).