

How to Match a Client with the Perfect Caregiver





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Trying to manage a home care business while keeping clients and caregivers satisfied can often seem like a juggling act. As a business owner, how do you keep everyone happy so that your business succeeds and grows? What do you do if someone isn't happy? Or if you drop one of the balls you are juggling?

As you juggle schedules, billing, and various clients and caregivers, one way to strive to keep everyone satisfied is by matching the right client with the right caregiver. It isn't just about which caregiver has an open schedule for a certain client's needs. It's about analyzing the needs of both the client and the caregiver and putting the right two together. With some research, and a little intuition, clients can be matched with the best caregiver for their needs, and caregivers can be matched with a client whom they are qualified to take care of and they enjoy working with—and both, hopefully, can form a long-lasting relationship with each other and with your home care business.

"Finding great caregiver/client matches can often be the difference between a short and long [business] relationship," explains Jason Tweed, in *Private Duty Today*, who uses the services of a caregiver in his home every day. "And long relationships equal big profits... Strong client/caregiver relationships also frequently lead to better relationships between the agency and the client's family." When clients and caregivers have strong relationships, your business grows and succeeds.

There are many factors to consider when it comes to matching the right client with the right caregiver. We have put together the following list, based on the feedback Home Care Pulse® receives as we interview caregivers and clients as part of our Quality Satisfaction Management Program:

The Client

The Caregiver

Medical needs	< 1 >	Qualifications
Physical needs	< 2 >	Physical ability
Home environment	< 3 >	Work environment
Location of home	< 4 >	Travel time
Frequency of services	< 5 >	Availability
Personality	< 6 >	Personality
Gender	< 7 >	Gender
Language/Culture	< 8 >	Language/Culture

1. The client's medical needs vs. the caregiver's qualifications.

Caregivers need to be qualified to take care of the client's medical needs. Does the client require specific medical attention or tests that the caregiver will need to know how to administer? Does the caregiver know how to perform first aid or CPR, work an oxygen tank or manage medication? Should the assigned caregiver be a CNA? Sending a caregiver into a situation unprepared can result in confusion, frustration and disappointment for both the caregiver and the client. On the other hand, sending a qualified caregiver who can properly and confidently take care of a client's needs will reassure the client that he or she is in good hands and that your home care business cares.

Keep track of your caregivers' training and qualifications. Offer more training opportunities to your caregivers. Give them an opportunity to learn and grow—and become more qualified to serve more clients.





2. The client's physical needs vs. the caregiver's physical ability.

If a client needs to be transferred from a bed to a wheelchair, will the caregiver be strong enough to do the lifting? Can the caregiver physically do all the client needs them to do? It may be difficult if you send a petite female caregiver to take care of a wheelchair-bound, heavy-set man. What if he needs to be transferred out of his chair? What if he falls in the process? Clients need to know that they are in sturdy, reliable hands. And caregivers need to work in a safe environment—not risking injury themselves by transferring more than they can handle. To assist your caregivers and help prevent injuries, make sure they are trained to use the proper physical aids, such as transfer belts.

3. The client's home environment vs. the caregiver's work environment.

Clients' homes are as varied as their personalities. Here are some things to consider in this category:

- **Cleanliness.** Is the client's home too filthy for a caregiver to safely work there? In the worst case scenario, you may need to recommend (or insist) that the client hire a cleaning service to clean the home before you send in your caregiver. Caregivers should not have to work in unsafe or unsanitary conditions.
- **Allergies.** Is the client or caregiver allergic to anything that might affect their time together? If the client has a pet in the house, and a caregiver is allergic, it could be a big health risk for the caregiver to work there.
- **Habits.** What if the caregiver smokes? Even if they don't smoke around clients, their clothes can smell of smoke, which can upset a non-smoking client. Encourage your caregivers to always be clean and professional in dress and appearance while they are on the job.



- Personal Preferences. Think of all the other factors that influence home or working environment: the presence of pets, children, family members, hobbies, noise, etc. Will the caregiver be able to adjust to the unique environment of the client's home?

4. The frequency of services needed by the client vs. the availability of the caregiver.

Consider how often the client needs services compared to how often the caregiver is available to work. Is the caregiver willing to work the hours required by the client? A caregiver who is not happy about working the required hours may be less than pleasant when they arrive at the client's home—and that will reflect poorly on your business.

Also, do you have a caregiver who can take on all of the client's needs or will you have to have several caregivers rotating in and out of the client's home? Having a consistent caregiver will allow a stronger client/caregiver relationship to form—whereas always having a different caregiver may lead to the client feeling unattached to anyone, and maybe even unattached to your business.

Utilize the technology available to assist you in this scheduling process. Find scheduling software that can help you with scheduling caregivers' hours of work and clients' needed hours of service. This technology can help ease your burden a little when it comes to juggling the various schedules. See the "Partners" page of our website, www.homecarepulse.com, for a list of companies who offer scheduling software solutions for your business and are integrated with Home Care Pulse's Quality Satisfaction Program.

5. The location of a client's home vs. the length of time the caregiver would need to travel from home.

Job location is a large factor in caregiver satisfaction. In interviews with caregivers, Home Care Pulse often hears caregivers say they appreciate it when they don't have to travel far to a client's home. Caregivers notice your efforts to place them in a client's home that is near their own home.

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This may also work to your benefit when a client calls and needs unexpected help, quickly. A nearby caregiver can get there faster.

Sometimes it is impossible to find a caregiver who lives near a client's home. In this case, to keep your caregiver happy regardless of the distance traveled, you may consider offering a travel/mileage reimbursement. Offer a certain amount of money per mile traveled. Or even occasionally give your top-performing caregivers a gas card or gift certificate for an oil change to show that you appreciate their willingness to travel the extra distance to serve clients.

6. The personality of the client vs. the personality of the caregiver.

If you have a caregiver who can work well with anyone, adapt to any client's personality traits, then you may not have to worry about this category as much. And often times people with completely opposite personalities can become close friends—they complement each other. But it is still important to consider the personality of your client and caregiver in some cases where it could present problems. You may have a client who is shy or reserved and would be bothered by an extremely outgoing, perky caregiver. On the other hand, you may have a client who is social and talkative and a caregiver who doesn't talk much—and feels uncomfortable in that situation. It would be nice if all caregivers could be flexible enough to work with anyone, but sometimes personality traits are a factor you may need to consider.



7. The gender of the client vs. the gender of the caregiver.

Gender can sometimes play a part in whether or not a client and caregiver work well together. Consider whether or not a female client is comfortable having a male caregiver take care of her needs. And the same would apply to a male client being cared for by a female caregiver. If it is going to be a problem, making the client or caregiver uncomfortable, this is a factor that may need addressing.

Sometimes situations occur where a male client may be overly flirtatious with a female caregiver, to the point it makes the caregiver uncomfortable. Personality, age and gender all may need to be considered in this situation. Regardless of these factors, sexual harassment in any form is unacceptable, and your clients and caregivers need to know that you are looking out for their well-being.

8. The language/culture of the client vs. the language/culture of the caregiver.

Your client and caregiver need to be able to communicate with each other. Will there be a language barrier? Will the caregiver know what the client is saying or vice versa? Caregivers and clients must be able to effectively communicate.

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Also consider the native culture of both your client and caregiver. Sometimes clients need assistance with cooking and are surprised to find out that a caregiver does not know how to cook traditional American cuisine. Though some clients may enjoy learning about a new culture, many prefer to have things a certain way in their home. Be aware of these differences as you match clients and caregivers.

Maintain the relationship.

Once a caregiver has worked with a certain client for a given time, find out how well they are working together. Get feedback from them both. Is this a good match between the two? Are they both happy? If one or both of them are unhappy, address their concerns and if necessary, make some changes as quickly as possible. Show them both that you are listening, and you are willing to do what it takes to keep everyone satisfied.

It can be difficult to collect feedback from clients and caregivers. Sometimes they may be reluctant to admit problems or concerns, worrying about how you may react or any possible repercussions. One way to solve this is to utilize the third-party services of Home Care Pulse. Home Care Pulse, as part of our Quality Satisfaction Management Program, will conduct interviews with your clients and caregivers, who can remain anonymous. Clients will be asked questions about their overall satisfaction with your business and the services they are receiving. Caregivers will be asked about their overall satisfaction with their job and the various aspects of working for your business.

When you receive the results from these interviews, pay attention to the comments your caregivers and clients have made. Let them know that you are aware of both the positive and negative feedback. Highlight the positive, but also quickly address any concerns they have and make any necessary changes.

In addition, once you have a client and caregiver who are working well together and building a long-term relationship, keep them together! Do your best not to take that caregiver away from the client. Keep the caregiver with the happy client. It is in your business's best interest to encourage a long relationship between the client and caregiver.

It takes some work, and a little bit of intuition, to know your clients and caregivers well enough to put the right two people together. But in the end, as you juggle all of the aspects that come with running a successful home care business, it will be well worth your time to focus on creating long-lasting client and caregiver relationships.

Measure what matters most!

Don't forget to check out Home Care Pulse's exclusive VANTAGE program that takes the guesswork out of building your home care business. VANTAGE provides home care owners and executives the tools and real-time data to:

- Increase client and caregiver satisfaction.
- Provide proof of quality.
- Benchmark performance against the industry.
- Learn from the industry's top leaders and take action ON your business.

Start benchmarking your data today! Sign up for your free VANTAGE account at www.homecarepulse.com/vantage or call 877.307.8573 to speak with a Home Care Pulse account executive.

About Home Care Pulse's Performance Benchmarking and Quality Satisfaction Management Program

Home Care Pulse is the industry's leading firm in performance benchmarking and quality satisfaction management, serving hundreds of home care businesses across North America. They are the industry's top resource for education, business development, certification and proof of quality, including the prestigious Best of Home Care® awards. Visit www.homecarepulse.com to learn more about our VANTAGE program, or visit benchmarking.homecarepulse.com to learn about the Private Duty Benchmarking Study, the home care industry's largest and most comprehensive annual study, featuring benchmarks on finance, sales, marketing, operation and more.

Call 877.307.8573 to contact Home Care Pulse for more information or email them at info@homecarepulse.com

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