Client Type Discovery
Worksheet

The purpose of this worksheet is to help you categorize your clients. By going through this strategic exercise, you'll be able to answer these important questions:

1. Which of your clients will truly help your business grow?

2. Which of your clients are in need of additional services you provide?

3. Which of your clients are distracting you from focusing on your best clients?

4. What actions can you take to help your highest-billing clients promote your business?

Instructions

1. Gather your Home Care Pulse Satisfaction Management Reports, team input, and your own thoughts and experiences with clients. Use the worksheet on page 2 to categorize your clients based on the definitions below. This will put you in a position to take actions that will ultimately create a better client experience for all and generate more referrals.

2. The last part of the worksheet is designed to help you identify 10% of your active client base — "Right-Fit Clients" making up the majority (at least 60%) of these clients — who need your focused attention for the next 30-days.

NOTE: If you have more clients than the worksheet can accommodate, you can either print off multiple sheets or use a program like Excel to layout your client types.

Client Type Defintions

Hidden-Liability Client: These are financially profitable clients who require a great deal of time to manage. They may be 24/7 clients, live-in or others, and their profitibility is likely why providers work with them for so long. Their satisfaction scores are typically 1-6 on their Net Promoter Score (see your Home Care Pulse Satisfaction Management reports) and are highly distracting. They have had problems with care, and sometimes the extra time they require becomes a liability to your business.

Poor-Fit Client: These clients are not profitable, have a low Net Promoter Score, and are demanding. These clients don't require more of your services, so upsell potential is limited, and they are likely pulling you away from providing better quality of care to others.

Upsell Client: These clients are not very profitable but are generally happy with your services. They have higher Net Promoter Scores and could use additional care.

Right-Fit Client: These are the clients you want to build your business upon. They are profitable and happy with a Net Promoter Score of 9-10. They're a pleasure to work with and would happily promote your business.

Possible Actions To Take With Clients

Hidden-Liability Client: Look closely at their feedback through the Home Care Pulse Satisfaciton Reports, as well as other sources. What are 1-3 actions you can take that would help resolve their concerns and turn them into fans? Do they need to hear from you more? Does a caregiver need to be changed? Is someone in the office creating greater frustration for them? If they cannot be rehabilitated to a "Right-Fit" Client, it might be worth referring them elsewhere and focusing your attention on other clients.

Poor-Fit Client: These clients would likely be better served elsewhere and need a cancellation letter with recommendations on what they can do next and where else to look for care that might be a better fit for them.

Upsell Client: Talk to them about adding weekend, weeknight, and other times of the day that would supplement and improve their current care. They may also be open to other services you offer, such as Care Management.

Right-Fit Client: These clients are your promoters and should occupy the majority of your time because they are the ones that keep you in business. Provide an outstanding Client Experience for them, and ask for referrals as appropriate.

877.307.8573
info@homecarepulse.com

Use this worksheet to categorize your clients among the 4 types defined on page 1 of this tool.

Hidden Liability	Poor-Fit	Upsell	Right-Fit
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
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_____	_____	_____	_____
_____	_____	_____	_____

Client Priority List *(Right-Fit Clients should make up at least 60% of this list)*

Client Name	Client Type	Summary of Action to be Taken
_____	_____	_____
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_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

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