



# The Home Care Growth Playbook

4 Proven Strategies to Get More Clients and Grow Your Revenue



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*With 10,000 seniors turning 65 every day and more agencies entering the industry all the time, there's never been more challenges and more opportunities to home care owners than there are today. With the right strategies and processes, you can develop a strong competitive advantage and keep growing when other agencies stall.*

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## PLAYBOOK CONTENTS

### STRATEGY 1

#### **Create a Better Sales System by Marrying Old and New Tech ..... 2**

*Peter Droubay | Caring.com*

As businesses in all industries shift toward an increased reliance on technology, many home care owners struggle to integrate new technology into their existing systems in a way that maximizes revenue.

### STRATEGY 2

#### **Transition to a Value-Based Care System Based on Delivering Outcomes..... 4**

*Shelle Womble | corecubed*

New changes like Medicare Advantage are pulling the industry into a value-based arena where home care agencies that can produce successful outcomes will play a valuable role in the overall continuum of care for seniors.

### STRATEGY 3

#### **Steer Away from Common Marketing Pitfalls to Generate More Consistent Referrals ..... 6**

*Gregg Mazza | Home Care Breakthrough Solutions*

Many home care agencies rely heavily on referrals but fall victim to the same few mistakes that cripple their efforts to grow. Here are some of the common mistakes—and what you can do to address them.

### STRATEGY 4

#### **Create a Stand-Out Client Experience and Provide Better Platforms for Your Clients to Talk About Your Agency ..... 8**

*Erik Madsen | Home Care Pulse*

Most agencies work hard to provide a great client experience and market that client experience using the Internet, but few agencies have a strategic process to guarantee a stand-out client experience and provide a platform to help their clients shout it from the rooftops.

## STRATEGY 1

# Create a Better Sales System by Marrying Old and New Tech

*As businesses in all industries shift toward an increased reliance on technology, many home care owners struggle to integrate new technology into their existing systems in a way that maximizes revenue.*

Everyone has felt the pendulum swing. Traditional marketing is declining, and [online marketing](#) is rising. The strategies that worked a few years ago don't work as well today.

Why is this? There are a few reasons.

**Online marketing is easier for clients.** It's private, convenient, and quick. It provides people with an easy way to connect with other people like them and learn from their experiences, rather than just taking the word of a business or brand.

**Online marketing is more cost-effective for businesses when it's done right.** It provides broader reach for less cost, better targeting to reach exactly the people you need to, more tools to track your results, and better speed to turn potential clients into leads.

Despite these changes, the biggest mistake remains the same: expecting your marketing to produce clients, as opposed to leads that you must then turn into clients.

### Closing Should Happen in Assessments—Not Over the Phone!

Unfortunately, many home care agencies expect every lead to be a client, so they have no sales system. Because there is no defined process, they wind up trying to close every sale over the Internet, through email, or over the telephone.



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**What's wrong with trying to close over the phone or the Internet?** It rarely provides the ability to build a connection with the potential client, fully understand their needs, or have a compelling conversation about your agency. This is not an effective way to convert leads to clients. Most won't buy. Those that do become clients will bill very few hours.

To create a system that attracts new potential clients with online marketing and facilitates opportunities for you to close with them in person, you need to create the right sales process. Here's an example of a modern, effective sales process that you can model yours after.

### What An Effective Sales Process Looks Like

**Step 1:** All leads go into a CRM (customer relationship management system) so that they can be contacted and tracked. See our [guide to CRMs for home care agencies here](#).

**Step 2:** All leads are called until reached by a full-time appointment setter, with a specific script. The script includes very minimal qualification and offers the potential client an appointment for an assessment. Where possible, no prices or care hours are quoted until after assessment.

**Step 3:** Appointments are booked for care coordinators/sales people. Measurement for the appointment setter is based on conversion to appointments.

**Step 4:** Send reputation/image-building material before appointment. This is a packet that includes articles, testimonials, and case studies.

**Step 5:** Assessments are conducted. They are not a presentation. They are well formatted, based on good salesmanship, but are only meant to elicit emotion and care needs through a structured assessment process.

**Step 6:** A care plan is developed on site and proposed. Sales are then closed.

### Things to Remember

1. Major decisions involve emotion.
2. Emotion is best influenced in person.
3. Emotion is best accessed through questions. Therefore, the Internet and the telephone should be used to set appointments in which you can conduct a thorough assessment.
4. When you try to do it all over the Internet, by email, or by telephone, you lose.
5. If you can marry online with offline, new school with old school, you'll be very successful.

## STRATEGY 2

# Transition to a Value-Based Care System Based on Delivering Outcomes



*New changes like Medicare Advantage are pulling the industry into a value-based arena where home care agencies that can produce successful outcomes will play a valuable role in the overall continuum of care for seniors.*

With the announcement that Medicare Advantage plans can now be used to cover non-skilled in-home care, home care agencies can fill a gap in the home health space by demonstrating that custodial care services have a high impact at a low cost. This has created a new discussion on value—the impact and outcomes that home care agencies can provide.

This value-based discussion will impact all of our traditional referral sources as they demand demonstrated outcomes from their home care partners. Medicaid waiver non-participants are already going down this path.

Value-based care represents a major opportunity for home care providers—and you can capitalize on it with relatively small shifts in the way that you conduct your operations, track your outcomes, and [market to referral partners](#).

### Offering Value-Based Care

Here are the basic steps you can take to start:

1. Identify which client conditions are your agency's focus. Consider the conditions that you are good at managing as well as the conditions that referral partners need the most assistance with.



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2. Provide [training for your direct caregivers](#). You may consider having your referral partners assist directly in offering this training.
3. Provide tools through an EVV ([electronic visit verification](#)) or app solution to capture caregiver-reported change of condition information about their client during the shift. One significant metric that is increasingly in demand is rehospitalization rates.
4. Communicate these outcomes to families, physicians, and referral sources. Create processes that regularly updates families of clients and demonstrate the value of your services across your marketing channels.
5. Use these results in all your marketing and sales efforts to referral sources.

### **Training Caregivers to Deliver Value-Based Care**

While the format of your training will ultimately depend on the needs and ability of your agency, as well as the specific outcomes and conditions you choose to specialize in, here are some general tips for training your caregivers.

1. Train caregivers to specialize in specific conditions such as Alzheimer's, dementia, Parkinson's, and depression.
2. Provide detailed, disease-specific care plans for caregivers to implement including daily

activities to enhance care, specific behavior/indicators that signal possible decline, and protocols for action when decline is detected

3. Use EVV to track and report each visit. Check with your scheduling software provider to see if they offer EVV.

It might sound like it's not too far from what you're already doing—and it might not be. However, it will be a game-changer for many agencies in the future. The trick is to be able to consistently track and demonstrate outcomes, and make sure that you wear these outcomes on your sleeve as proof of what you can do for future clients.

## STRATEGY 3

# Steer Away from Common Marketing Pitfalls to Generate More Consistent Referrals



*Many home care agencies rely heavily on referrals but fall victim to the same few mistakes that cripple their efforts to grow. Here are some of the common mistakes—and what you can do to address them.*

### Mistake 1: The “Spray and Pray” Method

The spray and pray method means that you’re doing what most home care agencies do—you’re using every means you can think of to try and get referrals. This might include going to community events, contacting assisted living facilities, going through senior directories, and taking out ads in local newspapers.

It’s great to use all your resources—but this strategy is dangerous because you’ll probably see just enough success to not realize that with a better, more intentional strategy, you could have a lot more success.

As a home care owner, there are already enough demands on your time without wasting your energy trying to get clients from sources that rarely yield clients or yield clients who provide fewer billable hours.

You need to be able to answer the basic questions when you’re deciding where to try to get more referrals and clients:

- Who are you calling on?
- Why are you calling on them?
- What is the potential of the account?
- How does it align with your avatar (or client who are the ideal fit for your business?)



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## Mistake 2: Using Tactics Without Strategy

Sun Tzu, an ancient Chinese military strategist and author of the classic strategy book *The Art of War*, says it best: “Strategy without tactics is the slowest route to victory. Tactics without strategy is the noise before defeat.” So many home care agencies rely on tactics without considering their overall strategy.

What is the difference between strategy and tactics?

Tactics are specific tools you use. They might include goals like marketing to more rehabs and giving presentations, sponsoring some events, and other ideas to get your name out there.

Strategies are longer-term approaches to achieving your goals. Example: We’ve identified our ideal client. We’ll decide how to position our agency to stand out from the competition. We’ll create a consistent message that demonstrates that we provide the greatest advantage and added value. Our presentation is structured in a certain order because it helps us connect with the referral source and leads them down a path to yes.

You need strategy and tactics to win.

## Mistake 3: Not Having a Strong Differentiator

Stop selling “Bathing, dressing, and meal prep!” You need to articulate the value and services of your agency in a way that sets it apart.

High-growth firms are 3 times more likely to have a [strong differentiator](#). In addition, a strong differentiator can make your services less price-sensitive, allowing you to make better margins on your services.

There are many ways you can create a strong differentiator. They might include:

- Specializing in care for specific conditions
- Demonstrating strong outcomes (see Strategy 2)
- Creating a wellness program
- Guarantees about staffing, satisfaction, and quality of care

Whatever you do, choose something that adds value, that’s not common in your market, and is relatively hard for your competition to imitate.

## Mistake 4: Not Having a Sales System in Place

Something to think about: why is McDonalds 2x bigger than the next closest burger franchise? Here’s a hint: it’s not the burger. It’s their system. Since its founding, McDonalds has focused on creating systems and processes that are more efficient, more reliable, more productive, more predictable, more valuable, and more successful.

Likewise, you need to establish consistent systems and processes that govern your agency. While many agencies establish systems for their client care, fewer agencies have solid sales systems. If you don’t have an organized sales system in place, you’re throwing away revenue. You need to create a system that is repeatable, that maximizes your opportunities with each potential new client, and can easily be used to train new salespeople.

## STRATEGY 4

# Create a Stand-Out Client Experience and Provide Better Platforms for Your Clients to Talk About Your Agency



*Most agencies work hard to provide a great client experience and make some effort to market that client experience using the Internet, but few agencies have a strategic process to guarantee a stand-out client experience and provide a platform to help their clients shout about it from the rooftops.*

Home care marketing [doesn't work like it used to](#)—for a lot of reasons. As Steve Schildwachter, former head of marketing at BrightStar Care recently said, “Customer experience and marketing are the same thing now.”

Here's what's happening: the Internet is making it easier for clients to compare quality of services side-by-side. More and more families are turning to the Internet find care providers—and when they do, they're impacted deeply by what reviews from current and past clients are saying about agencies.

Consider these stats:

- [92% of customers read online reviews about local businesses](#)
- [88% of customers trust online reviews as much as personal recommendations](#)
- [87% of customers will NOT trust a business with low ratings](#)

Jeff Bezos, CEO of Amazon, says it best: “It used to be that if a customer really liked—or didn't liked—your business, they might tell 6 friends. Now, with the Internet, they might tell 6,000 friends.”

To stay competitive in this shifting landscape, you need to provide an incredible client experience... and potential clients need to [hear about it from your clients](#). **Agencies that succeed in today's competitive landscape will be those who provide the best client experience, AND provide the best**



[home care/pulse](#)

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**opportunities for their clients to talk about their experience with potential new clients.**

Of course, every agency will say that they provide a great experience to their clients—and most of them are right. But the agencies who provide the best client experience are those that master the art of listening to pinpoint what they can do better—and gather the right information to make decisions based on fact rather than gut.

### How to Create a Stand-Out Client Experience

Here's what you can do. It's simple: but it's critical that you be vulnerable to feedback from your clients and that you embrace the negative feedback as a way to power change.

1. Actively seek [feedback from your clients](#) on what you can do to improve.
2. Measure client satisfaction with ratings from your clients. You can do this in-house, or hire a third party to do it for you, as this saves your staff time and usually generates more accurate feedback.
3. Focus on the aspects of client experience that have the most room for improvement—the low-hanging fruit.

Providing a great client experience is the best foundation for growth in any agency—but once you've created this foundation you need to provide platforms to maximize your clients' ability to tell other people about it. Online reviews are one of the most powerful ways for them to do this.

### Online Reviews Are a Platform For Clients to Brag About Your Agency

1. Maintain profiles on Google, Yelp, and Facebook—as well as care specific sites like [Caring.com](#), [Care.com](#), [APlaceForMom.com](#),

[AgingCare.com](#), and [BestofHomeCare.com](#).

If you're already maintaining profiles on these sites and aren't seeing very much from, don't give up—try consistently following the rest of these steps for at least 6 months and evaluating the results. Passively hoping that you get reviews versus [creating an organized system](#) to gather them is often the difference between 0-1 leads per month and many leads per month.

2. Make your listings stand out—keep them up-to-date, include [awards you've won](#), and respond to every review.
3. Create an organized plan to ask for reviews. Identify the touchpoints, the channels, and how often you'll ask for reviews. Consider providing your staff with a script.

A sample script that you could use:

“I'm glad to hear that things are going so smoothly with [caregiver's name]. We would love if you would leave a review about your experiences with our agency on [Google, Facebook, Caring.com, etc.]. Seeing glowing reviews from existing clients who love the service they're getting helps other people feel confident that they can trust us to provide *their* loved ones with great care too. If you're willing to provide a review, we'll send you an email in the next 24 hours with a link to leave a review so that it's quick and easy.”

For best results: Identify specific touchpoints to have your staff ask if they're willing to leave an online review, and then tell them to expect an email or SMS text message within the next 24 hours with a link to provide reviews.

If the Home Care Growth Playbook was useful to you, [please visit our Resource Library](#) to get more guides, webinars, and other free resources.



## It's not what you say about your business that matters, but what your clients and caregivers say.

Give them a platform to brag about your agency—  
and an experience worth bragging about.

To learn more about client/caregiver experience surveys and our Review Manager add-on, request a free phone call with one of our specialists.

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