LEADERS OF HOME CARE TOOL KIT

An exclusive set of tools for HCAOA members to reduce turnover, increase client satisfaction, manage finances, and grow their business.

This tool kit can be downloaded at www.homecarepulse.com/leaders-of-home-care-toolkit
“I joined the HCAOA in their early days back in 2004, when I owned and operated my home care business. Since then, I have found significant value in being a member of this wonderful organization. Joining and getting involved with the HCAOA is a very wise investment. Today Home Care Pulse is proud to be a partner with the HCAOA and is excited to make this exclusive toolkit available to all members. It is my wish that you’ll be able to use these tools to grow your home care business and provide the best possible services to your clients.”

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CAREGIVER RECRUITMENT & RETENTION

INCLUDED TOOLS

- Caregiver Mentor Program Guidesheet
- Caregiver Appreciation Brainstorming Sheet

ADDITIONAL TOOLS*

The Professional Caregiver Training Checklist and Guide

The WHY Caregiver Job Ad Example

*These tools available through the Home Care Pulse Satisfaction Management Program. Go to www.homecarepulse.com to learn more.
Caregiver Mentoring Program Guidesheet

Instructions

1. Calculate the number of mentors and mentor leads you need.
2. Select mentors and mentor leads.
3. Outline program benefits to share with your team.
4. Create a visual outline of your program’s structure.
5. Plan your compensation structure.
6. Define training structure.
7. Plan how you will promote your program and highlight it in marketing.
8. Launch your Caregiver Mentor Program.

Organizational Structure

Calculate the number of mentors and mentor leads you will need by working backwards:

1. How many new caregivers did you hire in the past 12 months? Ex: 48
2. 48 is divided by 6, which represents the number of new hires you averaged every 2 months.
3. A Caregiver Mentor can typically handle 3–5 new caregivers at a time.
4. A Mentor Lead can typically handle up to 5 Caregiver Mentors at a time.
5. Calculation:
   - 48/6 = 8
   - 8 new caregivers are hired every 60 days, which would require approximately 2 Caregiver Mentors.
   - 2 Caregiver Mentors can be supervised by 1 Mentor Lead.

Hand pick your top caregivers for the Mentor position. Make sure to include key team members in this decision. Some providers conduct a formal team interview with each candidate, which has its pros and cons. The downside of these formal interview is that when caregivers are not chosen, it sometimes impacts their morale as a caregiver.

Choosing a Mentor Lead — It is recommended that your Mentor Lead be either a Care Coordinator or other current staff member. This would be an additional responsibility on top of their current job duties.

Program Structure

Type out all of the known benefits of a Caregiver Mentor Program. Use this document to help explain to your team why you are moving in this direction. They need to be bought in, including your new Caregiver Mentors. Here are some examples but this list may change based upon provider:

- Creates the sense of importance through “belonging” and “connecting.”
- Decreases HIGH turnover during the first 60 days of employment.
- Boosts caregiver confidence and satisfaction.
- Boosts client confidence and satisfaction.
CAREGIVER RECRUITMENT & RETENTION

Caregiver Mentoring Program Guidesheet Continued...

- Offers growth opportunities/retention for top caregivers.
- Produces highly trained and accountable caregivers.
- Creates a positive, team-centered culture.
- Great recruiting tool.

Outline the program in a flow chart or some other visual representation that describes the roles and responsibilities of a Mentor Lead and Caregiver Mentor. Here is an example you are welcome to adopt. Keep in mind that this is a general flow chart. You may want to add more details specific to your program:

Caregiver Mentor Structure Flow Chart

New Caregiver

Assigned to Mentor Team

Mentor Lead
- Mentors New Caregiver In Orientation Training
- Random check-up calls/visits with New Caregivers as needed
- Reviews Weekly Progress of each New Caregiver with Director
- Certifies New Caregiver after 60-Day program is complete

Caregiver Mentor
- When possible, is introduced to New Caregiver at Orientation Training
- Weekly Mentor Call (New Caregiver Initiates Calls)
- 1st Shift - Mentors New Caregiver (2 Hours)
Roles and Responsibilities

*Mentor Lead Responsibilities:*
1. Ensures Caregiver Mentors are engaged and performing their duties as Mentors.
2. Tracks progress of the New Caregivers, ensuring they are receiving the proper support and training.
3. Conducts the trainings of the Caregiver Mentors, at least quarterly.
4. Reports progress of New Caregivers to the Director/Owner.

*Caregiver Mentor Responsibilities:*
1. Introduces the new caregivers to their clients when possible. If they cannot be present, the Mentor Lead should make these introductions.
2. Spends 2-3 hours a week conducting random check-ups and hands-on training.
3. Conducts weekly coaching calls with the new caregivers. (This responsibility could be rotated to the Caregiver Lead.)
4. Reports back to Mentor Lead every week on activity.

Weekly Mentor Coaching Calls

- New Caregiver calls Caregiver Lead weekly at pre-established time.
- Same time every week; initiated by the New Caregiver.
- 5-15 minute call.
- Weekly call may change based on schedule changes
- Review the Outcomes.
- Questions they may ask (switch them up):
  1. *Will you share 2 positive things that happened this week while working as a caregiver? (This should happen on every call.)*
  2. *How are your clients? Do you have any concerns?*
  3. *What challenges are you dealing with? Do you need any additional training?*
  4. *Do you have ideas that could help us and other caregivers?*
  5. *Do you have any suggested improvements that we could make in the office?*

Program Structure Tips

- New caregivers should be mentored for their first 60 days.
- Certificates of completion should be created and handed out once they have completed the program.
- Caregiver Mentors and Mentor Leads should be required to complete mentor training before
they take over their new roles.

- Those conducting the Weekly Mentor Coaching Calls should be trained on professionalism with the expectation to not gossip or speak ill of any team member or the company.
- Those overseeing the entire program, usually an Executive, should review the progress of new caregivers every month and identify Caregiver Mentors and Leads who are excelling or struggling.

### Compensation Structure

<table>
<thead>
<tr>
<th>Mentor Lead Structure</th>
<th>Caregiver Mentor Structure</th>
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<tbody>
<tr>
<td>Incentive based</td>
<td>Wage based</td>
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<tr>
<td>Incentive Example: For every new caregiver who completes program, Lead receives points/cash/gift card, etc.</td>
<td>Example: Overall hourly pay rate is increased by $1/hour</td>
</tr>
<tr>
<td>Their “Mentor Lead Certified” certificate, receives a new sticker for every time one of their New Caregivers completes the program</td>
<td>Paid for weekly calls, random calls, and “hands-on” mentor training</td>
</tr>
<tr>
<td>Mentor Stickers are a badge of honor—provides recognition of how many Caregivers they have mentored</td>
<td>Their “Mentor Lead Certified” certificate, receives a new sticker for every time one of their New Caregivers completes the program—recognition</td>
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</table>

### Training Structure

<table>
<thead>
<tr>
<th>Mentor Lead Certified</th>
<th>Caregiver Mentor Certified</th>
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<tr>
<td>Expectations when working with New Caregivers and Caregiver Mentors</td>
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<tr>
<td>Shadows Caregiver Mentors at clients’ homes</td>
<td>Additional transitioning for New Caregiver and client</td>
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<tr>
<td>Comprehensive review of company policies and procedures</td>
<td>Comprehensive review of company policies and procedures</td>
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<tr>
<td>Leadership training and role playing</td>
<td>Leadership training and role playing</td>
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<td>Random Checkup Calls</td>
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<tr>
<td>Communicating with Care Coordinators and Caregiver Mentors in scheduling and progress</td>
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<td>Reporting</td>
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<tr>
<td>“Mentor Lead Certified” Certificate</td>
<td>“Caregiver Mentor Certified” Certificate</td>
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Promotion Structure

Create a list of different referral types who need to know more about the program. The list should include at least the following types:

1. Applicants/candidates
2. Existing employees
3. Existing clients
4. Prospective clients
5. Professional referral sources
6. Others (association or community members)

Develop your promotion approach with each referral type. Ex: Existing clients

Create a handout describing how clients benefit from the Caregiver Mentor Program. Some of the benefits might include (1) having a more prepared caregiver taking care of them or their loved one, (2) receiving more hands-on care specific to their situation, (3) receiving care from highly trained and confident caregivers, (4) their caregivers have a career ladder and more opportunities, thus they stay longer. This handout could be a flyer or at time it may be best as a letter from the owner.
Caregiver Appreciation Brainstorming Sheet

1. Plan a meeting with key members of your team.
2. Make a list of ways you are recognizing your caregivers.
3. Define what’s working and what’s not.
4. Brainstorm new ways to recognize your caregivers using the ideas in this sheet.
5. Select 3-5 ways you will recognize your caregivers.
6. Create an action plan and delegate responsibilities for carrying out your plans.
7. Schedule a meeting to follow up after 60 days.

The purpose of this brainstorming guide is to give you and your team a starting point for generating ideas on how to best recognize your caregivers for the great things they are doing as they represent your company.

The ideas laid out in this brainstorming guide have largely come from thousands of employed caregivers through the Home Care Pulse Satisfaction Management Program. During our interviews, we ask the question, “How do you like to be recognized when you do a good job?” The most popular responses are contained herein, as well as input from our internal Home Care Pulse team.

IDEAS FOR RECOGNIZING YOUR OUTSTANDING CAREGIVERS

Company Events That Recognize Your Caregivers as a Whole

- Involve your admin team in creating a “thank you” video you can share on social media and during a company gathering.
- Monthly potlucks during in-services.
- Special food days (pizza, donut, pie, breakfast etc).
- Celebrate silly holidays, like Pi Day.
- Outdoor movies with their families.
- Rent out a local discount theater or drive-in.
- Monthly birthday celebrations.
- Free car wash day, where the admin staff washes the caregivers’ cars.
- Free Thanksgiving turkey.
- Rent out a bowling alley for the afternoon.
- Contest for concert tickets.
- Family picnic.
- Christmas cards mailed out.
- Free candy bars and goodies available for when they visit the office.
- Raffles – Every time a caregiver is recognized for something, they receive a raffle ticket that goes into a drawing for your monthly grand prize.

Recognition from Client & Family

- Communicate caregiver birthdays, anniversaries, employment anniversaries, and other special events to the client and family.
- When clients tell you how grateful they are to their caregiver, empower them to tell the caregiver directly.
- Gather feedback, notes, and expressions of gratitude from a caregiver’s clients and share it with them.
Recognition by Supervisor/Company

- Collect personal messages and feedback (Home Care Pulse reports, etc.) from a caregiver’s clients and share these with them.
- Recognition board in the office.
- Handwritten note, possible gift card included.
- Recognition budget – give your supervisors a budget (gift cards, concert tickets, spa packages, etc.) they are required to use and be accountable for every month. Forces them to look for opportunities to recognize.
- Send a personal letter of gratitude to a caregiver’s family, spouse, or significant other for supporting them in their job, etc.
- Unexpected pay raise given.
- Make gift cards personal to their various likes, hobbies, etc.
- Have other caregivers recognize their peers in team meetings or trainings.
- Leave positive notes on their paystub.
- If they lose a client to death, send them a condolence card, flowers, etc.
- Gift baskets sent to their home.
- Join reward sites, such as anyperk.com, which allows employees to utilize discounts, etc.
- Take them to lunch, one on one.
- Donate to a charitable organization in the caregiver’s name.

Reward & Promotional Systems

- Home Care Pulse Reports – Recognize and reward caregivers when their clients are satisfied and credit their caregivers for it.
- Specific award programs that reward positive behavior.
- Promotions, such as Caregiver Mentors.
- Title upgrade once a caregiver completes certain requirements/achievements (Caregiver becomes Care Specialist).
- Points program – They can earn points, based on overachievement, that go towards paid days off, electronics, etc.

Compensation

- Reward performance by giving an unexpected pay raise.
- Monthly incentives for going the extra mile. Ex: If caught doing a good deed, 4 hours of paid vacation provided.
- Additional hours rewarded to consistent overachievers.
- Additional benefits, such as vacation/sick, and insurance benefits for tenured team members.
- Gas cards, movie tickets, spa packages, salon packages, etc.
- Give out branded/swag items such as polo shirts, lanyards, water bottles, hats, sweaters, etc.
- Paid night in a hotel.
Peer Recognition

• Caregiver of the Month Program – These caregivers get special treatment, such as a parking spot, first rights on holiday time off, etc.
• Caregiver of the Year Program – Consider having the mayor, or some other dignitary award your caregiver. Special treatment, such as free Costco and Netflix membership for a year. Publish a press release and post on social media, place a banner outside with the caregiver's picture, etc.
• “Lifetime Achievement Award” for caregivers who have worked for you over 3 years.
• Have your top caregivers share positive client experiences during events and monthly trainings.
• Reward them for their ideas by creating a reward for the “Idea of the Month.”
• Hall of Fame in the office.
• Email everyone spotlights and recognition of caregivers every month.
• “Caught You in the Act” Award.
• Social media posts that recognize specific caregivers.
• Have your caregivers of the month/year involved in recording your hold music saying why they do what they do.
• Special name tags for top performers.
SALES & MARKETING
WITH REFERRAL SOURCE TOOLS

INCLUDED TOOLS

› Referral Source Portfolio Checklist
› Client Type Discovery Worksheet
› Referral Card Sample/Referral Letter Sample

ADDITIONAL TOOLS*

*These tools available through the Home Care Pulse Satisfaction Management Program.
Go to www.homecarepulse.com to learn more.
Referral Source Portfolio Checklist

When you meet with professional referral sources, you only have a moment to earn trust and make a lasting impression. Leaving a packet of information about your home care business and the services you provide can be an effective way to connect with doctors and other professionals in your area. Use this checklist to create or evaluate your own referral packet and to ensure it helps your agency stand out to your referral sources.

Below are items you should consider including in your referral packet.

- Mission/About Us Sheet
- Team member bios
- Detailed Services Sheet
- Map of service area
- Caregiver onboarding process sheet
- Client Case Studies

Additional Items Available Through the Home Care Pulse Satisfaction Management Program

Want to earn even more referrals and stand out from your competition? Below are additional items you can receive through the Home Care Pulse Satisfaction Management Program that will allow you to provide third-party proof that you offer excellent care, earn trust, and increase referrals.

Quality of Care Reports

- **Client/Caregiver Net Promoter Score® Report**
  This report shows your Net Promoter Score and indicates which percentage of your clients are promoters, detractors, or passives.

- **Client/Caregiver Testimonial Report**
  Authentic testimonials transcribed from live telephone interviews with your clients and caregivers.

- **Client/Caregiver Satisfaction Benchmark Report**
  This report shows how your home care business scores across seven client and seven caregiver satisfaction categories and how you compare to the industry average.

- **Client/Caregiver Satisfaction Trend Reports**
  Trend reports show how your clients and caregivers rate you in specific categories such as likelihood to recommend services, impact on daily life, compassion of caregivers, client/caregiver compatibility, caregiver training, and more.

Best of Home Care Awards & Certification

- Home Care Pulse Certified – Trusted Provider
- Best of Home Care® – Provider of Choice
- Best of Home Care® – Employer of Choice
- Best of Home Care® – Leader in Excellence
The purpose of this worksheet is to help you categorize your clients into four categories: Right-Fit Client, Upsell Client, Poor-Fit Client, and Hidden-Liability Client. With these client types identified, you can more easily create an action plan to grow your business and answer these four questions...

- Which of your clients will truly help your business grow?
- Which of your clients are in need of additional services you provide?
- Which of your clients are distracting you from focusing on your best clients?
- What actions can you take to help your highest-billing clients promote your business?

1. Gather your Home Care Pulse Satisfaction Management Reports, team input, and your own thoughts and experiences with clients. Use the worksheet on the second page of this tool 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 within your active client base — “Right-Fit 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 DEFINITIONS

**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 profitability is likely why providers work with them for so long. Their satisfaction scores are typically 1-6 on their Net Promoter Score (if applicable, 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 and other services you may offer.

**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:** If applicable, look closely at their feedback through the Home Care Pulse Satisfaction 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 on a consistent basis.

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

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

<table>
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<tr>
<th>CLIENT NAME</th>
<th>CLIENT TYPE</th>
<th>SUMMARY OF ACTION TO BE TAKEN</th>
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Dear Mr. Greg Denning,

Hearts home™ would like to thank you for allowing us to care for you or your loved one. We sincerely hope that you have had and continue to have a true “Hearts home™ Experience.”

As you know, our mission is to help seniors live confidently and age gracefully at home for as long as possible. We are continually working to educate the community about the services that we provide. However, it is often difficult to get this information to everyone.

Hearts home™ would like to ask for your help in this endeavor. If you know of anyone who could benefit from our services like you have, simply give one of the cards attached to this sheet with your name written on the back and prompt them to schedule a free assessment.

If they retain our services, we will give each of you 15% off a week’s worth of services!

We look forward to providing the services that you have come to value for your family, friends and neighbors.

Warmly,

Jordan McGuire
Home Health™

(Sample)

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SATISFACTION MANAGEMENT

INCLUDED TOOLS

› Friday Client Checkup Calls
› Promoter Follow-up Script
› Promoter Follow-up Sheet

ADDITIONAL TOOLS*

*These tools available through the Home Care Pulse Satisfaction Management Program. Go to [www.homecarepulse.com](http://www.homecarepulse.com) to learn more.
Friday Checkup Calls

**Purpose**

1. To make a weekly connection with your clients and improve communication.
2. To ensure your clients and their families are aware of the weekend’s/following week’s schedules.
3. To help minimize misunderstandings with schedules and other challenges.
4. To boost the overall satisfaction of your clients, paving the way for more referrals.
5. To give you a good opportunity to ask for referrals from your clients who are obvious promoters.

**GUIDELINES**

1. Person who is receiving the calls: Responsible parties of your clients. This could be the client, daughter, son, etc. The majority of your clients, especially those who have weekend care, should be called. Sometimes there are circumstances where it may not be appropriate for a client to be called every week.

2. Person who is making the calls: Typically Care Coordinators or those who manage the schedules. It is best to assign the same Care Coordinators to call the same clients every week so relationships can be established.

3. Suggested duration of each call: 3-5 minutes.

4. Time management: Make sure this is the primary focus for your Care Coordinators on Fridays. Weekend schedules should be worked through and assigned Monday-Thursday.

**CALL CHECKLIST**

- **Build Trust**
  
  *Keep track of personal events so you can ask about them specifically (e.g. “How did your grandson do in his game last week?”)*

- **Review Schedules for the Weekend and Following Week**
  
  *If possible, offer to e-mail schedules to your clients as well. Discuss anything out of the norm such as caregiver changes etc.*

- **Ask About the Benefits They’re Seeing**
  
  *If appropriate, ask how they are currently benefiting from the services.*

- **Ask for Suggested Improvements**
  
  *Though most clients will not openly share suggestions with you directly, asking for feedback shows that you are open to it.*

- **Ask for Referrals**
  
  *Though many providers struggle asking directly, remember the 5 Be’s of Asking for Referrals:*
  
  > Be Fearless: Asking for testimonials and referrals is necessary to gain strong competitive advantage.
  
  > Be Specific: “Do you know anyone in your book club who could benefit from our services,
Friday Checkup Calls Continued...

- Be Confident: Remind them of all the benefits they have received from your services.
- Be Consistent: Asking clients every week is not necessary, but you should ask once every couple of months at the least.
- Be Bold: Your business is built on referrals, and it’s ok to let them know that. Don’t be pushy, but don’t be shy.
Promoter Follow-up Script

Once you’ve identified your most satisfied clients, use this script to help your office staff get a conversation started in which you can ask for referrals. While every situation is different and will need to be adapted to, knowing where to start is the first step toward increasing referrals from your happiest clients.

Begin your call with pleasant small talk. Let the client know who you are and where you’re calling from, then ask about themselves. How is the care they’re receiving, do they have any upcoming trips or changes to their schedule you should be aware of, how’s their family etc. Listen intently and, if there are major issues brought up in the call you should postpone requesting referrals and make it a priority to take care of the client first. If all seems well, proceed with the script below.

If the client gave positive remarks in a satisfaction interview, start by saying something like:

I was also reviewing some positive feedback we received from you recently. I personally wanted to thank you for your kind remarks. We try very hard to ensure our clients receive the care they deserve, so it means a lot to know that you feel that way.

Allow the client to express a few thoughts, then proceed to “The Ask”:

I’m glad to hear things are going well. It’s always such a pleasure working with clients like yourself who appreciate our services. And actually, right now we’re looking to bring on additional clients who could really benefit from a little extra assistance from our team of caregivers. Do you have any friends or family members who you think would benefit from our services, as you have?

NOTE: If you know the client belongs to a specific club or group, you can ask if they know anyone in that club/group as well.

YES

possible response

That’s great! I’d love to reach out to them and see how we could help. Would you happen to have their phone number? (also be sure to get the person’s name - write the info down)

Thank you so much [CLIENT NAME]. We’ll contact [REFERRAL NAME] this week and then give you a call to let you know how it goes. And in the mean time, if you think of anyone else who could benefit from our services, feel free to call us any time.

NO

possible response

Well, [CLIENT NAME], we’d love to find more clients like you. If you do ever think of anyone who could benefit from our services, feel free to contact us any time, and we’ll call you back soon to check in and see how things are going.

Our business is built on referrals, and we’d love to hear from you. We appreciate all your support and we’ll be in touch soon. And also, please do let us know if there is anything more we can do for you. Have a great day, [CLIENT NAME].
# Promoter Follow-up Sheet

Use this sheet to track your team’s progress in obtaining referrals or testimonials when following up with your happiest clients. Print one of these sheets for each client you follow up with to keep a record your interactions.

**NAME OF PROMOTER:**

**FOLLOW-UP OBJECTIVE:**  
- **REFERRAL**  
- **TESTIMONIAL**

## FOR REFERRALS

1. **Call Client to Ask for Referrals**  
   - **DATE CALLED**  
   - **BY (team member)**

2. **Contact Referrals**  
   - **REFERRAL NAME**  
   - **CONTACT INFO**  
   - **DATE CALLED**  
   - **BY (team member)**  
   - **OUTCOME**

   - **REFERRAL NAME**  
   - **CONTACT INFO**  
   - **DATE CALLED**  
   - **BY (team member)**  
   - **OUTCOME**

   - **REFERRAL NAME**  
   - **CONTACT INFO**  
   - **DATE CALLED**  
   - **BY (team member)**  
   - **OUTCOME**

3. **Send “Thank You” to Client**  
   - **DATE SENT**  
   - **BY (team member)**

## FOR TESTIMONIALS

1. **Pull Quote From Client**  
   - **DATE COMPLETED**  
   - **BY (team member)**

2. **Add Quote to Permission Form**  
   - **DATE COMPLETED**  
   - **BY (team member)**

3. **Send to Client/Family Member**  
   - **DATE SENT**  
   - **BY (team member)**

4. **Completed Form Returned**  
   - **DATE RETURNED**  
   - **RECEIVED BY (team member)**

5. **Send “Thank You” to Client**  
   - **DATE SENT**  
   - **BY (team member)**
Need more tools to manage client and caregiver satisfaction?

These reports and more are available through the Home Care Pulse Satisfaction Management Program. Discover what your clients & caregivers think about your home care business and measure your performance with detailed monthly feedback and satisfaction scores.

Net Promoter & Caregiver Engagement Reports
Identify your Net Promoter Score® and Caregiver Engagement Score and see how your scores compare to the rest of the home care industry. Learn which clients are promoters, passives, or detractors and review their feedback.

Monthly Trend Reports
Track satisfaction scores over time across seven client and seven caregiver categories, and benchmark your results against the industry.

Testimonial Report
Receive client and caregiver testimonials you can use to market your home care business.
FINANCE & OPERATIONS

INCLUDED TOOLS

› Care Coordinator Position Agreement
› Inquiry Tracking Tool
› Staffing Strategy Tool

ADDITIONAL TOOLS*

*These tools available through the Home Care Pulse Satisfaction Management Program. Go to [www.homecarepulse.com](http://www.homecarepulse.com) to learn more.
A position agreement is a great tool for setting clear job expectations. Use this sample care coordinator position agreement as a reference as you create a position agreement that suit’s your business’s needs. Highlights indicate areas that need to be customized to your home care business. As you perform annual employee reviews, reference this position agreement and review responsibilities.

By and between [Name] and [Agency] Management

Position Summary Statement
To help retain quality employees and clients by providing staffing, operational, and marketing support.

Responsibility Summary

Client related responsibilities:
- Service Inquiry duties
- Accounts receivables/billing (A/R)
- Client files / binders
- Care Plans
- Personal Care Assessment (PCA) Nurse visit coordination
- Client visits

Caregiver related responsibilities:
- Pre-employment assessment administration
- Interviews and hiring
- New Hire Paperwork
- Payroll duties
- Staffing & Scheduling
- [Scheduling Software]
- Telephony & Timekeeping
- Training (New hire orientations & AFC)
- On-call duties
- Human Resources (W-comp, Workforce Services, Social Security, Employee Safety, health benefits, etc.)
- Assists with recruitment & retention activities

Community relations responsibilities:
- Assists the Elder Care Consultant (Sales Rep) with marketing & network visits
- Strengthens relationships with referral sources

Other responsibilities:
- Office operational support (misc. support)
- File audits (Client and Caregiver)
- Sales reporting
- Mail out approved welcome letters to new clients and families
- Other duties as assigned
Responsibility Structure

1. Work Schedule

<table>
<thead>
<tr>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00am – 5:00 pm</td>
<td>8:00am – 5:00 pm</td>
<td>8:00am – 5:00 pm</td>
<td>8:00am – 5:00 pm</td>
<td>8:00am – 5:00 pm</td>
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</tbody>
</table>

2. Territories

- Clients & Caregivers divided geographically (North and South)
- Caregivers can be borrowed from other Care Coordinators’ areas when needed

3. Sales Support

- Takes inquiry calls as they come in – Set up assessments
- Responsible for effective follow-up of inquiries taken
- Responsible for sending info packets out for inquiries taken
- Not territory assigned

4. Scheduling

- Responsible for staffing for clients in geographic territory and helping other Care Coordinator when out of office
- Responsible for using Caregivers in territory when possible to avoid extra travel, etc.
- Responsible for daily upkeep of telephony for Caregivers/Clients in assigned territory
- Friday phone calls for Caregivers/Clients in territory

5. Client Visits

- Visit clients within geographic area each week

6. Community Relations

- Visit referral sources within geographic area each week with President or Elder Care Consultant

7. A/R & Payroll

- Billing & Payroll Processing divided monthly (1st or 16th)
- Responsible for billing questions and issues for clients within geographically assigned area
- Responsible for collections for clients in area
- Responsible for HR (work comp, unemployment, etc. issues) for Caregivers in geographic assigned area

8. Other

- Responsible for keeping files clean and audit worthy for Clients and Caregivers in assigned territories.
- Cover other Care Coordinator’s territory and responsibilities on day off and when processing payroll and billing.
Responsibility Standards

1. Billing
   - 100% Accuracy
   - Billing mailing deadlines – 2nd business day after the end of the month and the 15th of the month
   - Service Deposits – Responsible for receiving, inputting and crediting in a timely manner. Service deposits should be refunded, if applicable, within 15 business days of the end of service date.

2. Account receivables (A/R)
   - $0 outstanding beyond 45 days (includes LTC)
   - 95% of payments collected within 30-days
   - Operations Manager must follow the “Collection Memo” included in the OM Operations Manual

3. Payroll
   - 100% Accuracy
   - Payroll mailing deadline – See payroll schedule for deadlines

4. Human Resources
   - Workers Compensation Claims – Handle any claims filed by employees for Workers Comp insurance. Help employees understand guidelines and expectations when they become hurt on the job.
   - Safety Program – Work with [Staff Member Titles] on updating and training staff on appropriate work safety
   - Workforce Services
     - Unemployment insurance claims
       - Ensure that all HCP’s who quit sign a “Letter of Resignation”
       - Fill out and send it all paperwork related to claims before required deadlines

5. Employee file audits
   - Conduct, with the assistance of the Office Coordinator, quarterly employee file audits.
   - Ensure that everything listed in the Employee Audit Form is in each file.
   - Work with Office Coordinator in contacting employees lacking certain items in their files.

6. Service Inquiry calls
   - When the Elder Care Consultant or President are not available to take an inquiry, it will be the Operations Managers responsibility to take those calls and setup assessments.
   - Communicate all inquiry calls to Care Consultant and President so that proper follow-up can take place.
   - Mail all required prospect info on same business day.
   - Inquiry to Assessment ratio expected: 50%
7. Reports
   - Service Inquiry (SI) Report
   - A/R Aging Summary Report
   - Billing and Payroll Reports
   - Other reports as requested by the CEO or President

8. Mail out welcome letters to new clients and families within 7 days of starting services.

Signing on behalf of care coordinator and agreeing to accept all its accountabilities and being bound by the terms of this agreement is:

Signature: ____________________________________________________________

Printed Name: ________________________________________________________


Inquiry Tracking Tool

Based on data from the 2017 Home Care Benchmarking Study, agencies that track every inquiry have annual revenue numbers that are 38% higher on average. This spreadsheet will help you keep a record of all inquiries about your services, and additionally help you track your sales close numbers for these inquiries. Be sure to enter the date for each inquiry and once a client is admitted, go back and enter their admission date.

https://goo.gl/MMZw8i
Staffing Strategy Tool

This tool will help you hone your staffing strategy so you can keep your sales per full-time employee low and identify how home care leaders are staffing their business. Reference the latest data from the Home Care Benchmarking Study and see how your business compares to the home care industry.

“Leaders of companies that go from good to great start not with “where” but with “who”. They start by getting the right people on the bus, the wrong people off the bus, and the right people in the right seats. And they stick with the discipline – first the people, then the direction – no matter how dire the circumstances.

Jim Collins, author of “Good to Great.”

Calculating Sales per Full-time Employee

See explanation below to calculate your sales per full-time employee.

Box A - Input annual revenue.
Box B - Input number of office staff (non-caregivers).
Count part-time office staff employees as half (.5) and include active owners.
Box C - Sales per full-time employee.

To Calculate Sales per Full-time Employee Divide A by B. i.e. \( \frac{A}{B} \)

Please refer to graph below to see how your sales per full-time employee compare to other providers with similar revenue.

Median Sales per Full-time Employee for 2016 - Revenue Ranges

- $0 - 799K
- $800K - 1.599M
- $1.6M - 2.799M
- Leaders - $2.8M+
Staffing Summary for 2016 - Overall and Revenue Ranges

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<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Active Owners (5%+ Ownership)</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Executives (Non-Owners)</td>
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<td>0</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Admin. Staff (Payroll, Billing, Secretarial)</td>
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<td>1</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Sales Reps</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>0.5</td>
</tr>
<tr>
<td>Staffing Coordinators/Care Schedulers</td>
<td>0.5</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Supervisors in the Field, Checking on Clients/Caregivers</td>
<td>0</td>
<td>0.5</td>
<td>1</td>
<td>2</td>
<td>0.5</td>
</tr>
<tr>
<td>Others Not Listed</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
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<td><strong>7</strong></td>
<td><strong>10</strong></td>
<td><strong>5</strong></td>
</tr>
</tbody>
</table>

These figures represent the median number of individuals who occupy each position for the comparison groups presented. The purpose of providing this information is to help providers gain insight into whether or not they are overstaffed for the volume of revenue they are producing.

Leader Staffing Organizational Chart

The numbers represent the median number of employees for the Leaders. This chart illustrates how the average Leader might staff his or her business.
Our Story

In 2008, Aaron Marcum, a successful home care business owner, founded Home Care Pulse to help agency owners and executives like himself measure and improve the satisfaction of their clients and caregivers. With 15 years of experience in home care and proven success in a competitive market, Aaron has brought a unique vision to Home Care Pulse.

Today, Home Care Pulse helps hundreds of home care businesses across North America track client and caregiver satisfaction with detailed monthly feedback and satisfaction reports. Learn how you can reduce caregiver turnover, increase referrals with proof of quality, and become a Best of Home Care® award-winning provider.

Features & Benefits Overview

**INCREASE CLIENT & CAREGIVER SATISFACTION**
Get monthly client and caregiver feedback reports and satisfaction scores so you can track satisfaction and make improvements that grow your business.

**REDUCE CAREGIVER TURNOVER**
Get detailed feedback from your caregivers across seven satisfaction categories including training received, likelihood to recommend employment, and client-caregiver compatibility, so you can quickly identify and respond to issues that impact turnover.

**EARN BEST OF HOME CARE AWARDS**
Based on your client and caregiver satisfaction scores, earn Best of Home Care Awards you can use to build trust in your business and stand out from your competition.

**INCREASE REFERRALS FROM CLIENTS & PROFESSIONALS**
Build trust with referral sources using third-party proof that you provide quality care. Use your satisfaction reports and Best of Home Care Awards to stand out from the competition and show evidence that you provide a superior service.

**HOME CARE PULSE OFFERS HUGE DISCOUNTS FOR HCAOA MEMBERS**
Save up to 25%

on the Home Care Pulse Satisfaction Management Program and start getting monthly feedback and satisfaction scores from your clients and caregivers.

Contact us today to learn more and request a free price quote.

877.307.8573 | info@homecarepulse.com | www.homecarepulse.com