Session 409
How to Gain More Clients: Tips for Private Duty Owners and Case Managers

Melanie Stover, OT, MBA, MS/ISM

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What will I learn during this session?

• Define your role in gaining more clients
• 5 Step Process
• Best Practices
Interrupt me!
(Really)

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How do you feel about “sales”?
Reframe your role: 
“Gain more clients”

Why do you do what you do?

- Client Advocate
- Home Care Educator
Why don’t more people get HC?
What do you bring to the table?

• Why do you work for your agency?

• What do you like best about them?

• Why should someone choose your HC?

Circle of Care Communication

• A method of providing support to your clients that enhances the care received with other professionals through increased communication

• With increased communication often better outcomes are produced

• Excellent client support and care partnering often gains more referrals
Circle of Care Communication

- Targets
- Why do they want to hear your message
- Your Role
5 Step Process

Step 1

• Identification of clients with current services
  – HIPAA and other “legal” paperwork
  – Process for clients with Home Health & Hospice
  – Develop a list

5 Step Process

Step 2

• Develop an action plan and a systemic process
  – Goals
  – Script
  – Support
  – Integrate into the care plan
5 Step Process

Step 3

• Ask for another client
  – Who is like “Mr. Jones”
  – Co visit

Step 4

• Ask for a meeting
  – Gain access to the “right people”
  – Warm introductions
5 Step Process

Step 5

• Follow up & repeat
  – Client updates
  – Monthly or quarterly review meetings
  – Reciprocal referrals

Best Practices

• Set visible goals – 5-10 clients identified by the 15th of next month

• Block off time each week to call care partners

• Create client updates each month

• Calendar it! Set up a reoccurring event.
### Tips from the field

- Block off time on your calendar
- DO NOT go into the office
- Empower your staff – this is how you help them gain independence

### Next Steps

- Who will be the point person for this process?
- Gain permission from clients to interact with other care professionals
- Start with a pilot program – identify 5-10 clients who have services
- Timeline – when will you start have your 5-10 clients identified?
Discussion

Thank You!

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**Step 1: Identification of clients with current services**

- HIPAA and other “legal” paperwork
  - Make sure you have permission!
  - Start of care or “open packet” get permission on the “front end”
  - What if I don’t have permission already?
    - Get it now
    - Tell your client why you would like to interact with their health care professionals – to provide better care
- Create a process of identifying any client who is currently receiving services in the home
  - Home health
  - Hospice
- Develop a list of clients who are receiving care in their home and the name of the clinician and agency that is providing care.

**Step 2: Develop and action plan to systematically contact the providers**

- Create call goals for the week.
- Share you “care for Ms. Jones and would like to support them better in the home. How could your caregiver help the patient achieve the goals set with the clinician?”
- Identify methods your caregiver could impact the patient and support the treatment plan in a non medical way
- Incorporate those methods into your care plan.
  - Educate your caregiver to include the items as part of their care

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**Session 409.**

**How to Gain More Clients: Tips for Private Duty Owners and Case Managers**

1. Identification of clients with current services
2. Develop an action plan to systematically contact the providers
3. Ask for another client to serve
4. Ask for a meeting
5. Follow up – repeat
**Step 3: Ask for another client to serve**
- Once you have discussed the current client ask, “who else do you have on case load that needs help like Ms. Jones?”
- Once a person is identified ask to speak with that person or offer to do a co visit

**Step 4: Ask for a meeting**
- Clinicians know their office – use their knowledge to gain access to the other health care professionals who are referral sources for you
- Ask for an introduction to their director, case manager or branch manager – whoever is the “right” person to help you get an audience with the field staff

**Step 5: Follow up – repeat**
- Client updates - check in with the clinicians – it is your best way to keep top of mind!
- Monthly or quarterly updates to the different health care professionals are a good way to keep top of mind.

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### Action Plan – Next Steps

<table>
<thead>
<tr>
<th>Description</th>
<th>Completion Date</th>
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</thead>
<tbody>
<tr>
<td>Who will be the point person for this process?</td>
<td></td>
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<tr>
<td>Gain permission from clients to interact with other care professionals –</td>
<td></td>
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<tr>
<td>Date to complete the “open packets” or the first set of clients.</td>
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<td>Completion Date:</td>
<td></td>
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**SERVE MORE CLIENTS – IMPACT MORE LIVES!**