HOW TO UNLOCK A CUSTOMER-DRIVEN GROWTH STRATEGY FOR YOUR PRIVATE DUTY HOME CARE BUSINESS
Presented by Aaron Marcum, Founder and CEO of Home Care Pulse

About The Presenter
Sources: The 2015 Private Duty Benchmarking Study

- Nearly 200 pages of performance data in areas such as satisfaction management, finance, operations, sales, marketing, caregiver recruitment and retention, and much more.
- Aggregated data of 701 providers representing over 1,000 locations.

Sources: My Background and Best Practices of Award Winning Providers
Presentation Agenda

• Why customer driven growth?
• What is The Exceptional Client Experience and why should you care?
• Define The Exceptional Client Experience for your business.
• The Five Strategies for Improving The Client Experience.

Why Customer Driven Growth?

“Do what you do so well that they will want to see it again and bring their friends.”

Walt Disney
Increasing Client Referrals Is The Outcome of Customer Driven Growth

- % of Participants - Clients Are Top Source
- Median % of 2014 Revenue

Clients - Past and current clients and their loved ones

19.5%  
25.1%

Client Referrals Cost Less

- Clients #1 Revenue Generator  
- All Others

Client Acquisition Cost Comparison

$522  
$570
**Client Lifetime Value Median**

- Clients #1 Revenue Generator: $11,667
- All Others: $9,418

**Can You Say That Your Clients Are Your #1 Referral Source?**

- Clients #1 Revenue Generator: $1,744,522
- All Others: $1,543,659

2014 Median Revenue Comparison
Why Should You Care About The Client Experience?

Happy Clients Stay Longer…and Generate More Revenue

- Those who averaged 14-month+ length perform better.

2014 Annual Median Revenue

- 14-Mo+: $1,868,000
- 1-13 Mo.: $1,254,000
Define The Exceptional Client Experience

- **Professionalism** – Do your clients feel a high level of professionalism and courtesy with every caregiver you send into their home?
- **Confidence** – Does your entire care team promote confidence to your clients with every task they perform. Are your clients confident in the work ethic of your caregivers?
- **Consistency** – Do your clients receive the same high level of care on every shift...from every caregiver? Are the schedules consistently staffed with the same people?
- **Integrity** – Does your entire care team promote trust and honesty with your clients?
- **Compassion** – Are your caregivers kind, gentle and willing to go the extra mile for your clients?
- **Quality trained** – Do your clients feel safe and secure when they are under the care of your professional caregivers?

Improve The Client Experience – The Five Strategies

1. Listen and take action on client feedback.
2. Cultivate The Exceptional Client Experience
4. Devote the majority of your time improving The Client Experience for your Right-Fit Promoters.
5. Focus on generating revenue from your promoters.
#1 – Listen and Take Action on Client Feedback (Taken directly from The Home Care Pulse Satisfaction Management Program)

7 – **Recommend Provider:** “At one time I recommended them but I haven’t been happy recently with the office…”

4 – **Effectiveness and frequency of the communication:** “I haven’t heard from the office in awhile but our caregiver keeps us informed.”

7 – **Confidence level in Office Staff:** “A couple of weeks ago the supervisor stopped in for a visit and took the care plan book…we haven’t seen it since.”

9 – **The knowledge & ability of caregivers:** “Our current caregiver is doing a great job and has great skills but the substitute last week was clueless.”

8 – **Coordination of caregiver’s schedule:** “The caregiver does all of our scheduling for us and that works okay accept there has been some miscommunication on who was covering for her, like last week.”

The satisfaction score is only the tip of the story
Take Action on Feedback

- Monthly Satisfaction Management Meeting
  - Who attends? Your entire office support team.
  - Purpose: To help the entire team stay focused on improving The Client Experience, one client at a time. Detailed review of your Home Care Pulse Satisfaction Management Reports.
  - Review your satisfaction measurement responses and feedback. WHAT ARE YOUR CLIENTS TELLING YOU?
  - Spend 20% of your time talking about what you can do to improve the experience for clients who have negative perceptions.
  - Spend 80% of your time talking about how you can continue to improve The Client Experience for your happiest clients.
  - Review recent client referrals and discuss what Promoters you and your team are going to target for referrals in the coming month.

#2 Cultivate The Exceptional Client Experience

The Back Stage

The Front Stage
The Back Stage Makes The Client Experience Possible

<table>
<thead>
<tr>
<th>Front Stage / What The Client Experiences</th>
<th>The Back Stage of Your Business</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service inquiry</td>
<td>Sales technique and strategy</td>
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<tr>
<td>The Care Plan / Expectations</td>
<td>The Care Plan Book process</td>
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<tr>
<td>First impression of their professional caregiver</td>
<td>Dress code and standards</td>
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<td>Paying for services</td>
<td>Simplified and well designed invoices</td>
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<td>Calling the office after hours</td>
<td>24/7 on-call support system</td>
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<td>In the know on the care schedule</td>
<td>Friday check-up calls</td>
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<tr>
<td>The quality of care</td>
<td>Recruitment &amp; Training System</td>
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<tr>
<td>Providing unfiltered feedback</td>
<td>Satisfaction Management Program</td>
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Unlock Your Promoters

Upsell  The Right-Fit

Client Types

Hidden-Liability  Avoid
Identify Your Promoters by Measuring Client Satisfaction Consistently

Based on The Net Promoter® Score (NPS) Rating System

- Based on one question:
  - “How likely is it that you would recommend [company name] to others?” Scale of 1-10, 10 being “highly recommend.”
- Promoters (Score 9-10): Loyal enthusiasts who will keep using your services and refer others, fueling growth!
- Passives (Score 7-8): Satisfied but unenthusiastic and vulnerable to competitive offerings.
- Detractors (Score 0-6): Unhappy clients who can damage your brand and impede growth through negative word-of-mouth.

Client Types Defined

- **Hidden Liability Client**: Profitable, but...
  - Net Promoter Scores (1-6)
  - Take focus off Right-Fits
  - Can be rehabilitated
- **Avoid Client**: Not very profitable
  - Net Promoter Scores (1-6)
  - Take focus off Right-Fits
  - Refer them elsewhere
- **Up-Sell Client**: Not very profitable
  - Net Promoter Scores (1-6)
  - Take focus off Right-Fits
  - Cross-Sell & Up-Sell!
- **The Right-Fit Client**: Profitable
  - Net Promoter Scores (9-10)
  - A pleasure to work with
  - Target more!!
  - Cross-Sell & Up-Sell!
## Identify Your Clients by Client Type

<table>
<thead>
<tr>
<th>Hidden Liability</th>
<th>Avoid</th>
<th>Upsell</th>
<th>Right-Fit Clients</th>
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</thead>
<tbody>
<tr>
<td>Mrs. Hider</td>
<td>Mr. Sendon</td>
<td>Mrs. Needsmore</td>
<td>Mrs. Perfectclient</td>
</tr>
<tr>
<td>Mr. Distractor</td>
<td>Mrs. Pain</td>
<td>Mr. Undersold</td>
<td>Mr. Smiley</td>
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</table>

**WARNING** – DO NOT LET THESE TYPES OF CLIENTS DISTRACT YOU FROM WORKING WITH YOUR MOST PROFITABLE CLIENTS!

## Create Your Rehab Plan for Each Client Categorized as Avoid and Hidden Liability

The Right-Fit

Hidden Liability
Devote the Majority of Your Time Improving The Client Experience for Your Promoters

How Do Best of Home Care® Providers Stay Focused on Right-Fit Promoters?

Consistently Educate Their Teams

- Monthly Satisfaction Management team meetings. Identify their promoters, passives and detractors.
- They have woven in their culture the terms such as The Client Experience, promoters, passives and detractors.
- Spend the majority of your time in the meeting discussing ways to specifically show appreciation to your Promoters.
- Focus on the core values that make up The Client Experience. Share it.
- **COMMUNICATE THE CLIENT EXPERIENCE WITH YOUR PROFESSIONAL CARE TEAM!!!!**
Focus on generating revenue from your Promoters.

Why?
1. The obvious #1: Avoid and Hidden Liability Clients (Detractors) do not refer.
2. The obvious #2: Happy clients (Promoters) do like to refer.
3. Right-Fit clients are surrounded by people just like them.
4. They appreciate your services more than anyone else: “Do what you do so well that they will want to see it again and bring their friends” – Walt Disney

Promoters Are Your Best Advocates

“Clients who appear on your door on personal recommendation will already have a certain level of trust in you – inherited from your existing customer.” - Unknown
“Unlock Your Mouth”

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<tbody>
<tr>
<td><strong>BE COMPETITIVE</strong></td>
<td>Asking for testimonials and referrals is a strong competitive advantage</td>
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<tr>
<td><strong>BE SPECIFIC</strong></td>
<td>“Do you know anyone in your book club who could benefit from our services, like you have?”</td>
</tr>
<tr>
<td><strong>BE CONFIDENT</strong></td>
<td>Remind them of all the benefits you have provided them</td>
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<tr>
<td><strong>BE CONSISTENT</strong></td>
<td>Ask every couple of months</td>
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<tr>
<td><strong>BE FEARLESS</strong></td>
<td>They need to know that your business is built on referrals.</td>
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The Power of Client Referrals
Top Providers Rely on Client Referrals

4.14 Top 5 Reasons Why Consumers Choose a Home Care Provider - Historical

- Recommended by Family & Friends: 28.4% 27.6%
- Reputation of Company: 26.6% 26.6%
- Recommended by Referral Source: 18.4% 20.8%
- Consumer Marketing of Company: 14.9% 14.6%
- Selected by Case Manager (Government Programs, Hospital, etc.): 8.3% 10.6%

Can You Say That Your Clients Are Your #1 Referral Source?

- Clients #1 Revenue Generator: $1,744,522
- All Others: $1,543,659
Success Tool for Attendees

- Client Referral Discount Card Campaign (Samples)

Please leave me your card if you would like this tool.

- Leading Satisfaction Management Program (Info on Best of Home Care®)
  connect@homecarepulse.com
- Annual Benchmarking Study
  Benchmarking.homecarepulse.com

Toll-free (877) 307-8573
www.homecarepulse.com