



Sales AND Marketing

Sales and Marketing Manual

Prospecting Home Care Clients

SALES AND MARKETING MANUAL

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Chapter 1

Prospecting Home Care Clients



Finding your first client might be stressful if you don't know where to look, there are many home care businesses out there competing with you daily, it is now left for you to stand out among your competitors.

Any good business must have competitors, sometimes competitors is a good thing for your business, and if you are in a business where there are no competitors then you will have to spend a lot of money to get people to know about you.

When going out to make calls for your business first impression matters a lot, like the old saying “the way you dress is the same way you will be address.” You should always look professional anytime you walk outside your house selling your home care business.

You don’t have to wear anything expensive, but just look presentable enough in other to be respected.

Whenever you go out there you must sell your uniqueness, the reason for this is because there are other home care sales representative, and there is no difference between you and your competition unless your customer perceives a difference.

You must differentiate yourself as a sales person, you must:

- Be more prepared than the other guy
- Be more engaging than the other guy
- Ask better questions than the other guy
- Have a deeper belief system than the other guy
- Provide more perceived value than the other guy
- Present more creative ideas than the other guy
- Be a better communicator than the other guy
- Tell better stories than the other guy
- Be more enthusiastic than the other guy
- Be friendlier than the other guy

“The first goal of the salesman is to have the customer like you and trust you.” - Tom Hopkins

Perfect Your Elevation Speech

Before you start going about marketing your business you must practice your elevator speech, an elevator speech is what you will say when someone meet with you on the road and ask about what you do, and what your business is all about.

For Example:

Hi, my name is Ronke Odigie I am the Care Manager with Emerald Total Care a home care senior services, we offer affordable home care services in Houston and surrounding areas. Would you happen to know anyone looking for care, as we are looking to help as many families as possible in the community? By the way we have a great referral program that we pay \$500.00 per client you send our way. Take my care and keep in touch.

Three Sources of New Clients

1. Consumers

- Client
- Family
- Friends

2. Health Care Providers

- Hospitals
- Physicians
- Skilled Nursing Facilities
- Assisted Living Facilities
- Independent Living Facilities
- Home Health Agencies
- Hospices
- Home Medical Equipment Companies
- Home Infusion Pharmacies
- Outpatient Rehab Facilities
- Outpatient Surgery Centers
- Workers Compensation Insurance Companies
- Adult Day Care Centers

3. Trusted Advisors

- Bank Trust Officers
- Elder Care and Estate Planning Attorneys

- Geriatric Care Managers
- Licensed Social Workers in private practice
- Guardians and Conservators
- Financial Planners
- Long Term Care Insurance Agents
- Clergy

Your “Premium Customer”

In the private pay market, you will find that most of the time, the primary family caregiver for the client will be the oldest daughter. Next in line comes a younger daughter, a daughter-in-law, a granddaughter, a spouse, a son, a son-in-law, or a neighbor.

When you are looking for ways to focus your marketing efforts, you will find that identifying your “Premier Customer” is very important. Your “Premium Customer” is the ideal person who is most likely to buy your services, and who will be your most profitable customer over the long haul.

Consumer Marketing versus Referral Marketing

One of the key decisions every home care company needs to make is whether to focus on marketing directly to consumers or marketing to referral sources who will introduce you to the consumer.

The 2013 Private Duty Benchmarking Study from Home Care Pulse shows that 75% of home care companies focus on Referral Marketing, and 25% focus on Consumer Marketing.

Pick One. You can't do both at the same time ... **with excellence!**

Top Consumer Marketing Methods

According to the 2014 Private Duty Benchmarking Study from Home Care Pulse, the top consumer marketing methods used by the Leading Companies in the industry – those generating more than \$2 million in revenue – are:

1. Internet Search Engine Optimization
2. Corporate Web Site
3. Newspaper Advertising
4. Public Speaking at Consumer Events
5. Ads in Senior Directories
6. Exhibiting at Health Fairs
7. Google Ad Words
8. Radio Advertising
9. Other Consumer Events

The study also provides a list of over 50 different methods used by home care companies to reach out directly to consumers

Top Referral Marketing Methods

The 2014 Private Duty Benchmarking Study from Home Care Pulse also identifies the top referral marketing methods used across the industry

1. Making direct sales calls to referral sources at their location
2. Placing literature racks in the offices of referral sources
3. Advertising and listings in senior directories used by referral sources
4. Exhibiting at trade shows in order to network with referral sources
5. Speaking at educational events attended by referral sources
6. Sending Email newsletters to referral sources

7. Paid sponsorship of special events attended by referral sources
8. Personal Email to referral sources
9. Paid advertising in professional publications read by referral sources

The study also shows the top referral sources listed by the leading companies – over \$2 million in revenue

1. Past and current clients
2. “Other Referral Sources” – including trusted advisors
3. Hospital discharge planners
4. Home health agencies
5. Skilled nursing facilities
6. State Medicaid Waiver programs – Medicaid Waiver clients only
7. Hospices
8. Geriatric Care Managers
9. Area Agency on Aging – Medicaid Waiver and AAA clients only
10. Assisted Living Facilities

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Chapter 2

Simple Strategic Marketing Plan

Primary Strategies:

1. **Networking in the Community** – Networking is the process of connecting with people you know to earn an introduction to people they know, who are potential referral sources.
2. **Sales** – Making direct face-to-face sales calls on high potential referral sources
3. **Web Site** – Having a highly effective web site with good Search Engine Optimization

Secondary Marketing Strategies:

1. **Direct Mail** – Using personal letters, note cards, and post cards to keep your name and new information in front referral sources on a regular basis.
2. **Email Newsletter** – A monthly email newsletter written especially for referral sources with items of information for your targeted readers.
3. **Public Speaking** – Frequent speaking engagements for groups of referral sources.

Marketing Action Plan

Here is a set of suggested action steps for each of the primary and secondary marketing strategies in your marketing plan.

I. Networking in the Community

1. Make a list of people you know based on the Seven F's of a balanced life:
 - Family & Friends – everyone in your family and friends who might know a referral source
 - Fun - what do you do for fun? Make a list of people you know who do the same things.
 - Faith – who do you know from your church who might know someone?
 - Fitness – what do you do to keep fit physically, mentally, and emotionally? Who do you know from your fitness activities?
 - Finances – who do you know from your financial life who might be able to introduce you to a referral source? Banker, CPA, insurance agent, financial planner.
 - Free Gifts – where do you volunteer your time? Who do you know from those volunteer groups?
 - Focus on Career – who do you know from your previous career who can introduce you to a referral source?
2. Divide your list into three sections based on their potential – high, medium, low
3. Write a telephone script to plan what you will say to these people, explaining that you are starting a home care business and you would like to discuss your marketing efforts and how an introduction to people they know would be helpful.
4. Set aside time in your calendar to make phone calls to the names on your high potential network list to set up appointments for a personal meeting.
5. Set up an appointment with each of the networking friends on your “A” list.
6. Keep your appointment with each person. Ask about them and how they are doing. Explain briefly about your new business. Describe your ideal referral sources. Ask who they know who might be able to refer a client to your business.
7. Follow up with a personal note and a small thank you gift.

II. Sales

1. Read chapter three of this manual and complete each of the worksheets and activities.
2. Develop a list of 80 high potential referral sources in your local marketplace.
3. Divide the list into “A”, “B”, and “C” based on their potential to refer your “Premium Customer.”
4. Write a telephone script to plan how you will introduce yourself to each referral source, how you will use your network contact, and how you will ask for an appointment.
5. Set aside one hour a day to make telephone calls to your “A” list.
6. Make your sales calls.
7. Track the results of your calls and your follow up activities.
8. Review the outcomes of your sales calls. Re-read chapter three and refine your sales process.
9. Make telephone appointments with your “B” list.
10. Track the results, and refine your process.
11. Make appointments with your “C” list.
12. Update your list of 80 prospects every 90 days, and revise you’re a, B, and C list.
13. Make 7 – 8 calls per day 4 days per week.

III. Website SEO

1. Write exceptional copy for your web site.
2. Use original photographs of your team and your clients.
3. Use video whenever possible.
4. Create your own videos.
5. Update the content of your web site weekly by adding new articles in the Blog section. Put links in your blog posts back to specific pages of your site.
6. Use your blog articles as the lead articles for your electronic newsletter.
7. Track every inquiry and referral call that comes into your office. Log where the caller heard about your company

8. Use Google Analytics to track who visits your site and where they came from, how long they stay, and what pages they visit.

IV. Direct Mail

1. Set up a computerized database of all your high potential referral sources as well as your networking contacts.
2. Add clients and families of clients to the database.
3. Send hand written notes to each person you meet with in your networking calls or your sales calls.
4. Send personal business letters to your prospects once a quarter with a brochure or flyer.
5. Go to www.sendoutcards.com, and set up an account. Use Send Out Cards to keep in touch with A Prospects regularly. Use Send Out Cards to keep in touch with C Prospects that you don't have time to all on frequently.

Creating a Mailer:

There are a lot of different shapes, folds, sizes, colors, etc. to choose from. Don't get caught up to long making you choose the most important thing is getting it out.

Pay close attention to your own mail when it comes and notice the things that catch your attention and think about that when creating your mail piece.

Wording:

The wording is very important as you have very little time to capture their attention and keep them reading.

1. **Headline.** A catch headline is mandatory. You want to pull them in
2. Have a Deadline w/ an offer.

For example, "Call us before the 31st and receive 4 hours of free no obligation home care service." This will create urgency and give them an opportunity to test drive your service.

3. **Call to Action.** Simply give them exact instructions on how to contact you immediately.
4. **Testimonial.** Have a short testimony of someone who is or was happy with your service.

5. Referral opportunity. A brief outline of your referral program. Let them know if they send you a client you will pay them cash. As simple as saying we pay for referrals.

V. Email Newsletter

1. Go to the www.constantcontact.com
2. Set up a Constant Contact account.
3. Get the graphic artist who did the graphics for your web site to design a banner for the top of your email newsletter.
4. Set up your newsletter template in Constant Contact.
5. Upload your email list for prospects, your networking contacts, your clients and their family caregivers, and your employees. Have a separate list on Constant Contact for each list so that you can send individual emails to each list if you choose.
6. Set up a schedule to publish your newsletter once a month send out the newsletter at the same time each month.
7. Develop your editorial calendar for the newsletter. Decide what articles you want for your lead article.
8. Write a blog post on your web site. Use the headline and first two sentences for the lead in your newsletter. Then link back to the blog post.
9. Layout your newsletter several days ahead of the mail date. Have members of your team proof read the newsletter. Then schedule it to be sent on the appointed day.

Use the analytics on Constant Contact to measure how many emails you are sending out, what % are opened, and what % click through to other web pages.

VI. Public Speaking

1. Pick three speech topics about senior care issues that will be of interest to high potential referral sources.
2. Research these topics and develop content for your presentations.
3. Create an outline for each presentation.
4. Develop a PowerPoint show for each presentation. Use your own photos and graphics when possible. Use video if you are able.
5. Develop stories and examples to go with each point in your outline.
6. Build in questions for the audience and opportunities for them to participate.

7. Give small gifts to audience members who ask questions or engage in activities to reward participation.
8. Practice the presentation with members of your team.
9. Develop a handout using the outline for your presentation, and your company's logo, colors, and contact information. Be sure to link back to your web site.
10. Ask your referral sources and your networking contacts what professional associations or service clubs they belong to. Ask for an introduction to the program chair of each organization.
11. Reach out to the program chair to offer to speak for one of their upcoming meetings.
12. Develop a system to get the names and contact information for members of the audience.
13. Develop a system to follow up with audience members. (Use Send Out Cards to automate the process).
14. Track how many inquiries or referrals come from your speaking engagements.

Other Marketing Strategies:

Strategy #1:

Bandit Signs – You must check with your target cities laws to ensure you don't get fined. If there is a law against it put them out on Friday and pick them up on Sunday night before the city workers sees them. It's a money mover so you don't have to keep buying new signs.

Note: If you are a CAN you can start getting private clients asap. You can work the clients by yourself and use the extra money to build your business. You can register with Medicare as an independent caregiver and bill them as well.

Strategy #2:

Brochure Racks – You can put your brochure racks in the following places:

- Assisted Living Facility

- Nursing Homes
- Rehabilitation Centers
- Senior Day Care Facilities
- Geriatric Doctors
- Salons and Day Spas

Note:

When calling these places, you must keep the calls very simple. For example:

“Hi my name is Ronke Odigie, I am the owner of Emerald Total Care a new Home Care Services and we wanted to stop by and introduce ourselves and leave some material about how we are helping seniors and their families in Harris County.”

Create a list of the locations and contact person you spoke with; the goal is to contact the discharge nurse and see how your company can help with care one person is sent home.

It is very important to have your stuff together when entering these facilities and businesses. You want to represent your company in the best way possible. Be ready to answer questions about your new business. You want to dress very well and speak well. You want to be personable and likeable.

Once you've placed your racks you want to follow-up at least once a month. Not only do you want to refill your racks you want to bring something to give the office. It can be something as simple as flowers to brighten up the office or pastries or donuts for the staff. Just don't go empty handed.

Strategy #3:

Referral Program

- Client Referral Program
 - New Client Promo Kit
 - New Client Referral Slip

Write down 5 people you know that might need service or will eventually need our services in the future.

You can also get:

1 – Magnet Calendar

10 – Business Cards

1 – Referral Card

1 – Reminder Wristbands

1 – Tee Shirt

1 – 50 Safety Tips Handbook

1 – 4 hours Gift Certificates

We offer the client's \$500 cash or services for their referral. We don't pay it out all at one time. We give them \$125.00 for every 20 hours their referral receives services up to \$500 which is 80 hours.

- Caregiver Referral Program

Referral Card. We give them \$125.00 for every 20 hours their referral receives services up to \$500 which is 80 hours.

- Business Referral Program
 - Referral Card

Social Media Presence

- Google Places
- YouTube
- LinkedIn Business Page
- Facebook Business Page
- Twitter

Hootsuite.com will allow you to schedule and automatically posts to all accounts at once.

Chapter 3

Capture the Caller: Turning Inquiries into Admission

Up to this point, we have been focusing on strategies and tactics to make your phone ring. Once the phone rings, then another aspect of the marketing process kicks in: converting callers to customers.

The conversion process has three steps:

1. Taking the incoming call and engaging the caller in conversation
2. Scheduling an in-home assessment to evaluate the situation, determine specific needs, and develop a plan of care
3. Signing the service agreement and admitting the client to service or developing a plan to tour assisted living options with the purpose of placing that client.

According to the 2014 Private Duty Benchmarking Study from Home Care Pulse, the conversion ratio from inquiry to assessment in 2013 was 38.8%. The conversion ratio from assessment to admission was 80.6%, which makes the overall conversion ratio 31.3%

That means that for every ten calls a home care company received, only three were admitted servicing. You are spending a lot of time and money on sales and marketing. You want to maximize your investment by converting as many callers as possible to customers. Here are some tips to help you do that.

Engage the Caller

Way too many people who answer the phone at home care and assisted living placement companies think they need to tell the caller all about their services in the first two minutes. In fact, the opposite is true.

The best inquiry people rarely say anything about the company for the first five to seven minutes. They are asking questions, listening, getting the caller to talk, and learning about the situation.

To help you do that, we've developed an inquiry form with three simple questions:

1. 1. Tell me about your ... (Mom or Dad)
2. What are your greatest fears in caring for ... (Mom or Dad)
3. What is your ideal situation?

You also want to find out where the caller heard about your company. There are three simple questions to get that information too:

1. . Where did you hear about us?
2. Where else did you hear about us?
3. Where did you get our telephone number?

By asking these questions and tracking the answers, you will find out what parts of your marketing plan are working more effectively to make your phone ring.

Here are the steps to capture the caller:

1. Use the Inquiry Form with every call
2. Engage the caller in conversation. Keep them talking if possible
3. Ask questions, listen to the answers, and follow up with more questions
4. Document the results of your call on the form.
5. Schedule a free in-home assessment
6. Track your inquiries on the Inquiry Log

Chapter 4

The Road Ahead

Entrepreneurship is a new way of life and a new way of thinking. You must be prepared to get uncomfortable, meet new people, and let go of some people.

Starting a business is very challenging, and doing anything significant requires personal and self-improvement.

Enjoy the journey as you go, get excited about where you are going, and when things start getting tough and when it seems that you can't do it that is when you should know that you are getting closer to your breakthrough. That is the stage where you never give up but turn up and go harder.

Be prepared to make some sacrifices, be prepared to give up some things for a while, things like TV, Facebook, Instagram, etc. are all distractions. These things take the most valuable thing that we all have and that is – TIME.

Create A Plan:

Write out exactly what you do at the end of the week. How many cards you passed out. How many brochures racks you placed. How many signs you put out. Repeat the same every week.

Track Your Result:

See what's working and what's not. Get different numbers for every marketing strategy. A number for signs, a number for brochures, a number for flyers and business cards.

The Fortune Is in the Follow Up:

Following up on leads is the most important part of your marketing. It will allow you to get the most out of your marketing dollars. When someone calls you they

need services, it may not be that day but they will need it. You want to make sure that whenever they do decide to pay for services you come to mind.

Phone Follow Up's:

You want to have a system so that you can know when it's time to follow up. We use Axiscare system, all we do is enter the leads information with the notes from the call and if they don't need services right away the system has a feature that can enter a date to follow up. You want to contact every lead at least every 21 – 30 days. Even if they went with another company you want to continue to contact them to see if they are happy and remind them that you can always fill in shifts and offer competitive prices.

Mail Follow Up:

You want to create a credibility kit of some sort that have your references, some background information, and services offered. You want to get this out to them as soon as possible if they aren't quite ready for an in-home consultation. Next you want to send them follow-up letters and holiday postcards just to remain in their mind when it comes to home care.

Note: It is very important to get the leads mailing address when they call so you can implement the strategy.



Good Luck!