

HCAB

Home Care Agency Blueprint

Building Successful Home Care Businesses

Marketing

Playbook

Growth Strategies for Home Care Agencies

Complete Playbook

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Welcome to the Home Care Marketing Playbook

Congratulations on taking this important step toward building a successful home care agency. Whether you're just starting out or looking to grow an existing business, this playbook will give you the proven strategies, scripts, and systems you need to attract clients and build sustainable referral relationships.

The home care industry is built on trust. Families are making one of the most important decisions of their lives when they choose a care provider for their loved ones. Your marketing isn't about selling - it's about demonstrating your commitment to quality care and building relationships with the people who can refer clients to you.

What Makes This Playbook Different

This isn't theory. Every strategy, script, and template in this playbook comes from real-world experience helping home care agencies grow from zero to profitable. We've tested what works and eliminated what doesn't.

How to Use This Playbook

This playbook is designed to be both a learning tool and an action guide. Here's how to get the most from it:

- **Read it through once** to understand the complete picture of home care marketing
- **Focus on one chapter at a time** as you implement each strategy
- **Use the 30-60-90 day plan** as your roadmap - don't try to do everything at once
- **Customize the scripts and templates** to match your agency's voice and services
- **Track your results** using the metrics we provide so you know what's working

Pro Tip

The agencies that succeed are the ones that take consistent, focused action. Don't try to implement everything at once. Pick the strategy that makes the most sense for your current situation and master it before moving on.

The Foundation of Home Care Marketing

Before we dive into specific tactics, let's establish the principles that will guide everything you do:

1. **Relationships First:** In home care, your reputation is your most valuable asset. Every interaction is an opportunity to build trust.
2. **Consistency Wins:** Marketing isn't a one-time event. Success comes from showing up consistently, week after week.
3. **Value Before Ask:** Always lead with how you can help, not what you want to sell.
4. **Track Everything:** What gets measured gets improved. Know your numbers.
5. **Patient Persistence:** Referral relationships take time to develop. Stay the course.

Let's get started building your home care marketing machine.

Building Your Brand Foundation

Creating a memorable identity that attracts clients and referral partners

Understanding Your Market Position

Before you can effectively market your home care agency, you need to understand where you fit in your local market. This isn't about being all things to all people - it's about finding your niche and owning it.

Competitive Analysis

Start by mapping your local competition. Search online for home care agencies in your service area and document:

- How many agencies operate in your area?
- What services do they offer?
- How do they position themselves (luxury, affordable, specialized)?
- What do their online reviews say?
- What makes them successful or unsuccessful?

Competitive Analysis Worksheet

Competitor Name	Services Offered	Positioning	Strengths	Weaknesses

Identifying Market Gaps

As you analyze your competition, look for gaps in the market - needs that aren't being fully met. Common opportunities include:

- **Specialized care:** Dementia, Parkinson's, post-surgical recovery
- **Cultural competency:** Caregivers who speak specific languages or understand cultural traditions
- **Schedule flexibility:** Agencies that offer overnight, weekend, or last-minute care
- **Geographic coverage:** Areas currently underserved by existing agencies
- **Service quality:** Markets where existing agencies have poor reviews

Defining Your Unique Value Proposition

Your Unique Value Proposition (UVP) is the clear statement that describes the benefit you offer, who you serve, and why you're different. A strong UVP answers the question: "Why should someone choose your agency over all others?"

UVP Formula

[Your Agency] helps **[target audience]** achieve **[desired outcome]** through **[your unique approach]**, unlike **[alternatives]** that **[common problem]**.

Example UVPs

- "We provide consistent caregiver matching so your loved one sees the same familiar face every visit."
- "Our bilingual caregivers help Spanish-speaking seniors receive care in the language they're most comfortable with."
- "We specialize in memory care, with all caregivers trained in the latest dementia support techniques."
- "Family-owned and locally operated, we treat every client like our own family member."

Build Your UVP

Step 1: What specific problem do you solve better than anyone else?

Step 2: Who is your ideal client? (Be specific)

Step 3: What outcome do you deliver that matters most to them?

Step 4: What makes your approach unique?

Creating Your Brand Identity

Your brand identity is how your agency presents itself to the world. It includes your visual elements (logo, colors, imagery) and your verbal elements (tone, messaging, key phrases).

Visual Brand Elements

Element	Purpose	Best Practices
Logo	Instant recognition	Simple, professional, works at any size
Colors	Emotional connection	Blue/green (trust), warm colors (compassion)
Typography	Personality	Clean, readable fonts; avoid overly decorative
Imagery	Show your care	Real people, warm settings, diverse representation

Color Psychology in Home Care

Colors evoke emotions. Choose colors that align with the feelings you want to create:

- **Blue:** Trust, reliability, professionalism
- **Green:** Health, growth, peace
- **Purple:** Dignity, wisdom, quality
- **Orange/Warm tones:** Energy, warmth, friendliness

Avoid These Branding Mistakes

- Using clip art or generic stock photos
- Choosing colors that are hard to read or unprofessional
- Having an inconsistent look across materials
- Using jargon that families don't understand

Messaging That Resonates

Your messaging should speak directly to the emotional needs of families making care decisions. Remember: they're not buying hours of care - they're buying peace of mind, safety, and quality of life for someone they love.

Emotional vs. Functional Benefits

Functional Benefit	Emotional Benefit
24/7 availability	Peace of mind knowing help is always there
Background-checked caregivers	Confidence that your loved one is safe
Personalized care plans	Feeling understood and valued as an individual
Medication reminders	Freedom from worry about missed doses

Key Messaging Themes

Weave these themes throughout all your marketing communications:

1. **Independence:** "Helping seniors live life on their own terms"
2. **Dignity:** "Care that honors who they are"
3. **Peace of Mind:** "So you can focus on being family"
4. **Quality:** "The care you'd want for your own family"
5. **Trust:** "A partner you can count on"

The "So That" Test

For every feature you mention, add "so that..." to get to the real benefit. Example: "We provide consistent caregiver scheduling so that your mother can build a real relationship with her caregiver so that she feels comfortable and you have peace of mind."

Referral Source Strategy

Building relationships that drive consistent client referrals

The Referral Source Landscape

In home care, the vast majority of your clients will come through referrals. While online marketing has its place, building strong referral relationships is the foundation of a sustainable home care business. Let's explore each key referral source and how to build relationships with them.

Understanding Referral Source Priorities

Each referral source has different motivations. Understanding what matters to them is key to building effective relationships:

Referral Source	Their Primary Concern	How You Help
Hospital Discharge Planners	Safe, timely discharges	Quick response, reliable care setup
Physicians	Patient compliance and outcomes	Care coordination, updates on patient status
Senior Centers	Member wellbeing and resources	Educational content, trusted referral option
Elder Law Attorneys	Client advocacy and planning	Quality care partner for their clients
SNF/Rehab Facilities	Smooth transitions, reduced readmissions	Continuity of care post-discharge

Hospital Discharge Planners

Hospital discharge planners (also called case managers or social workers) are often your most valuable referral source. They're responsible for ensuring patients have appropriate care in place before leaving the hospital.

What Discharge Planners Need From You

- **Reliability:** When you say you'll have a caregiver there, they need to trust that it will happen
- **Speed:** They often need care arranged within 24-48 hours
- **Communication:** They want to know the care is in place and going well
- **Problem-solving:** Flexibility when situations change
- **Professionalism:** Materials they're proud to share with patients

How to Connect With Discharge Planners

● Step 1: Research

Identify all hospitals in your service area. Find the social work or case management department contact information.

● Step 2: Prepare Materials

Create a professional folder with your brochure, business cards, service summary, and referral pad.

● Step 3: Make Initial Contact

Call to introduce yourself and ask if you can stop by to drop off information about your services.

● Step 4: In-Person Visit

Keep it brief (5-10 minutes). Introduce yourself, leave materials, and ask about their referral process.

● Step 5: Follow Up

Send a thank-you note. Return every 2-4 weeks with treats or updated materials.

Phone Script: Initial Contact with Discharge Planner

You: "Hi, this is [Name] with [Agency Name]. We're a home care agency serving the [City/Region] area. I'm reaching out because we'd love to be a resource for your patients who need non-medical care when they're discharged. Would it be okay if I stopped by briefly to introduce myself and leave some information about our services?"

If they say yes: "That's great! What day and time works best? I know you're busy, so I'll keep it very brief."

If they're hesitant: "I completely understand - I know how busy you are. I could also just drop off materials at the front desk if that's easier. Is there a specific contact person I should address them to?"

Maintaining the Relationship

Getting in the door is just the beginning. Here's how to stay top of mind:

- Visit every 2-4 weeks with coffee, treats, or seasonal goodies
- Send holiday cards and small gifts (check facility gift policies)
- Provide feedback after receiving referrals: "Mrs. Johnson is doing great with us"
- Offer to do in-service training on home care topics

Be responsive and solve problems quickly when they arise

Send a monthly email newsletter with helpful resources

The "Treats Strategy"

Never underestimate the power of bringing food. Hospital staff work long hours and often skip meals. A box of donuts, fresh fruit, or even just good coffee creates goodwill and makes you memorable. Just be sure to check facility policies first.

Physician Offices

Physicians see patients who need home care but may not know where to refer them. Building relationships with primary care doctors, geriatricians, and specialists (cardiologists, neurologists, oncologists) can create a steady referral stream.

Understanding the Physician's Perspective

Doctors are extremely busy and protective of their time. They also care deeply about their patients' outcomes. Your approach should respect their time while demonstrating how you can help their patients.

Who to Target

- **Primary Care Physicians** - See the broadest range of patients
- **Geriatricians** - Specialize in senior care
- **Cardiologists** - Patients often need post-procedure support
- **Oncologists** - Cancer patients frequently need in-home assistance
- **Neurologists** - Patients with Parkinson's, dementia, stroke recovery
- **Orthopedic Surgeons** - Joint replacement patients need recovery support

Getting Past the Gatekeeper

In most physician offices, you'll first encounter office staff who protect the doctor's time. Build relationships with them - they often influence which resources get recommended to patients.

Script: Approaching the Office Manager

You: "Hi, I'm [Name] with [Agency Name]. We provide non-medical home care services, and I was hoping to learn about how your office handles patients who need help at home. I know Dr. [Name] is busy, so I wondered if I could start by speaking with the office manager or whoever coordinates patient resources?"

If they ask what you want: "We help patients with things like medication reminders, meal preparation, transportation to appointments, and companionship. Many doctors tell us they wish they had a reliable resource to recommend when patients or families ask about home care options. I'd love to leave some information and see if we might be a good fit as a referral resource."

What to Leave Behind

Create a physician-specific packet that includes:

- One-page overview of your services (not a full brochure)
- Business cards
- Referral pads with your contact information
- Brief explanation of what home care covers (many confuse it with home health)

Physician Office One-Pager Template

[YOUR AGENCY NAME]

Non-Medical Home Care Services

When to Refer a Patient:

- Patient reports difficulty with daily activities (bathing, dressing, meals)
- Family expresses concern about patient safety at home
- Patient is non-compliant with medications or medical instructions
- Patient is isolated and would benefit from companionship
- Post-surgical or post-hospitalization recovery support needed

Our Services Include:

- Personal care assistance
- Medication reminders
- Meal preparation and nutrition support
- Light housekeeping
- Transportation to appointments
- Companionship and cognitive engagement

To Refer a Patient: Call [Phone] or fax to [Fax]

Senior Centers and Community Organizations

Senior centers, Area Agencies on Aging, and community organizations serve large populations of seniors and their families. These organizations are excellent referral sources because they interact with seniors before they're in crisis.

Types of Organizations to Target

- Senior centers and adult day programs
- Area Agency on Aging
- Churches and faith-based organizations
- Veterans organizations
- Alzheimer's Association local chapters

- Parkinson's Foundation support groups
- Libraries with senior programs
- Rotary, Kiwanis, and other civic groups

Strategies for Engagement

Offer to Speak

Present on topics like "Aging in Place Successfully" or "How to Have the Care Conversation with Your Parents"

Sponsor Events

Support health fairs, holiday parties, or educational programs with your time or resources

Provide Resources

Create helpful handouts or guides they can share with their members

Volunteer

Offer your time for events - this builds relationships naturally

Script: Approaching a Senior Center Director

You: "Hi, I'm [Name] with [Agency Name]. We provide home care services for seniors in the area, and I'm reaching out because I'd love to be a resource for your center. I'm not here to do a hard sell - I'm just wondering if there are ways we might be able to support your members. For example, I could offer to do a free educational presentation on topics like fall prevention or staying safe at home, or I could simply leave some brochures for families who have questions about care options."

Presentation Topics That Work

- "10 Tips for Aging in Place Successfully"
- "Fall Prevention: Simple Changes That Save Lives"
- "How to Have the Care Conversation with Your Parents"

- "Understanding Your Options: Home Care vs. Assisted Living"
- "Caregiver Burnout: Signs and Solutions"
- "Technology for Seniors: Apps and Devices That Help"

Skilled Nursing and Rehabilitation Facilities

Patients leaving skilled nursing facilities (SNFs) or rehabilitation centers often need continued care at home. Building relationships with these facilities' discharge coordinators can create a steady referral pipeline.

How SNF Referrals Work

When a patient is ready to be discharged from a SNF or rehab facility, the discharge coordinator works with the family to ensure appropriate care is in place. If non-medical home care is needed, they'll recommend agencies they trust.

What SNF Coordinators Value

- **Reliability:** Care must be in place when promised
- **Communication:** Updates on how the transition is going
- **Flexibility:** Ability to adjust care as patient improves
- **Quality:** Caregivers who understand post-acute needs
- **Partnership:** Being a resource, not just a vendor

Reduce Rehospitalizations

SNFs are heavily penalized for patients who are readmitted to the hospital within 30 days. Position your agency as a partner in preventing readmissions through consistent care, medication reminders, and early warning sign monitoring. This makes you valuable to the facility, not just the patient.

Scripts and Email Templates

Cold Email Template: Discharge Planner

Email Template

Subject: Home Care Resource for Your Patients - [Agency Name]

Dear [Name],

I'm reaching out to introduce [Agency Name], a licensed home care agency serving the [City/Region] area. I know discharge planners are often looking for reliable non-medical care options for patients transitioning home.

We specialize in:

- Quick response times (often within 24 hours)
- Consistent caregiver matching
- Clear communication with families and care teams
- Flexible scheduling from a few hours to 24/7 care

I'd love to drop off some information and introduce myself briefly. I know your time is valuable, so I'll keep it to 5 minutes.

Would [Day] or [Day] work for a quick visit?

Best regards,

[Your Name]

[Agency Name]

[Phone] | [Email]

Follow-Up Email After First Referral

Email Template

Subject: Thank You - Update on [Patient Name if appropriate]

Hi [Name],

I wanted to thank you for referring [Patient/the Smith family] to us. We were able to get care started [same day/the next day], and things are going smoothly.

[Optional specific detail: "Mrs. Smith and her caregiver Maria are getting along wonderfully, and the family is relieved to have support in place."]

Please don't hesitate to reach out if you have any questions or if there's anything else we can help with. We're always happy to be a resource.

Thank you again for trusting us with your patient's care.

Best,

[Your Name]

Phone Script: Following Up on a Left Message

Follow-Up Call Script

You: "Hi [Name], this is [Your Name] with [Agency Name]. I stopped by a couple weeks ago and left some information about our home care services. I wanted to follow up and see if you had any questions, or if there's anything specific I can help with. I'm also happy to bring by some fresh materials and [treats/coffee/snacks] for your team if that would be welcome."

If they say they haven't needed you yet: "That's totally fine - I just wanted to make sure you have my contact information handy for when you do. Is there anything about our services I can clarify? And please know I'm always just a phone call away if something urgent comes up."

Script: Asking for Feedback

Feedback Request Script

You: "Hi [Name], I wanted to check in and see how things have been going with the clients you've referred to us. We're always looking to improve, and your feedback is really valuable. Is there anything we could be doing better or differently to make your job easier?"

If they give positive feedback: "That's wonderful to hear - thank you! We really appreciate the trust you place in us. If you ever hear of colleagues at other facilities who might benefit from a reliable home care partner, we'd be grateful for an introduction."

Digital Marketing Basics

Establishing your online presence to attract and convert families

Your Website as a Marketing Tool

Your website is often the first impression families have of your agency. Even if they were referred by a discharge planner or physician, most people will look you up online before calling. Your website needs to build trust and make it easy to take the next step.

Essential Website Pages

Page	Purpose	Key Elements
Home	First impression, quick overview	Clear headline, services summary, CTA, phone number
Services	Explain what you offer	Service descriptions, who each helps, benefits
About Us	Build trust and connection	Your story, values, team photos, credentials
Service Areas	Local SEO, show where you work	List of cities/zip codes, map if possible
Testimonials	Social proof	Client reviews, family stories (with permission)
Contact	Make it easy to reach you	Phone, email, form, hours of operation

Website Must-Haves

- Phone number visible on every page (header)

Mobile-responsive design (most visitors use phones)

Fast loading speed (under 3 seconds)

Clear calls-to-action ("Call Now," "Get Started")

SSL certificate (https://) for security

Professional photos (avoid generic stock images)

Easy-to-read fonts and sufficient contrast

Contact form that works and notifies you immediately

Common Website Mistakes

- Phone number buried or missing
- No clear next step for visitors
- Outdated content or "coming soon" sections
- Slow loading (kills conversions)
- Not mobile-friendly
- Generic content that could be any agency

Content That Converts

Your website copy should speak directly to the emotions and concerns of families. Here's a framework:

1. **Acknowledge the situation:** "Caring for an aging parent can feel overwhelming"
2. **Show you understand:** "You want the best for them, but you can't do it all alone"
3. **Present the solution:** "Our compassionate caregivers provide the support your family needs"

4. **Prove your credibility:** "Licensed, bonded, and trusted by 100+ families"
5. **Remove risk:** "Free consultation, no obligation"
6. **Call to action:** "Call us today at [phone] to learn more"

Google Business Profile Optimization

Your Google Business Profile (formerly Google My Business) is one of the most important free marketing tools available. When families search "home care near me," your profile determines whether you show up - and whether they click.

Setting Up Your Profile

1. Go to business.google.com and sign in with a Google account
2. Search for your business or click "Add your business"
3. Follow the verification process (usually a postcard mailed to your address)
4. Complete every section of your profile

Optimization Checklist

- Business name exactly matches your legal name (no keyword stuffing)
- Correct address and service area defined
- Phone number matches your website
- Hours of operation set (consider 24/7 if you offer it)
- Category set to "Home Health Care Service" or similar
- Complete business description with keywords
- High-quality photos uploaded (office, team, logo)

Services listed with descriptions

Q&A section populated with common questions

Posts published weekly with updates or tips

Getting Google Reviews

Reviews are critical for local search rankings and trust-building. Here's how to systematically collect them:

● Timing Is Everything

Ask for reviews when families express gratitude - after a caregiver goes above and beyond, after a positive check-in call, or after successfully completing a care plan.

● Make It Easy

Create a direct link to your review page and share it via text or email. Include step-by-step instructions for those unfamiliar with the process.

● Follow Up

If they agree to leave a review, send a friendly reminder within 24 hours with the direct link.

Script: Asking for a Review

You: "Mrs. Johnson, I'm so glad to hear that Maria has been such a great fit for your mother. It really means a lot to us to hear that kind of feedback. If you have a moment, would you mind sharing that experience in a Google review? It helps other families find us, and it really means a lot to our team. I can text you a link that makes it super easy - it only takes a minute."

Responding to Reviews

Positive reviews: Thank them personally, mention specifics from their review, express your commitment to continued quality care.

Negative reviews: Respond professionally and promptly. Acknowledge their concern, avoid being defensive, offer to discuss offline. Remember, your response is for future readers as much as the reviewer.

Social Media for Home Care

Social media can help you stay top of mind with referral sources and build trust with families. However, it's important to focus your efforts on platforms that actually matter for home care.

Platform Priorities

Platform	Priority	Best Use
Facebook	High	Community building, local groups, family education
LinkedIn	Medium	Professional networking, B2B referral sources
Instagram	Low-Medium	Humanizing your brand, caregiver recruitment
TikTok	Low	Caregiver recruitment (if targeting younger caregivers)
Twitter/X	Low	Industry news (not client-facing)

Facebook Strategy

Facebook remains the most important social platform for home care marketing because that's where adult children (your decision-makers) spend time, and there are active community groups where you can build presence.

Content Types That Work

- **Educational posts:** Tips for caregivers, aging in place advice

- **Caregiver spotlights:** Introduce your team (with permission)
- **Client stories:** Share success stories (with permission)
- **Community involvement:** Photos from events, sponsorships
- **Behind-the-scenes:** Training sessions, team celebrations
- **Resource shares:** Link to helpful articles or organizations

Sample Social Media Content Calendar (1 Week)

Day	Content Type	Example Topic
Monday	Educational Tip	"5 signs your parent may need extra help at home"
Tuesday	Caregiver Spotlight	Meet Maria, who has been with us for 3 years
Wednesday	Resource Share	Link to Alzheimer's Association resource
Thursday	Engagement Question	"What's the best advice you've received about caring for a loved one?"
Friday	Feel-Good Story	Client/family thank-you note (with permission)

Online Reviews and Reputation Management

In addition to Google, families may check other review sites before choosing an agency. Manage your presence on these platforms:

- **Caring.com** - Major senior care directory
- **A Place for Mom** - Popular resource for families
- **Yelp** - General business reviews
- **Facebook** - Reviews/recommendations on your page
- **Better Business Bureau** - Trust signal for some families

Reputation Management System

1. Claim your profiles on all major review sites
2. Set up Google Alerts for your business name
3. Check reviews weekly across all platforms
4. Respond to all reviews within 48 hours
5. Address negative reviews immediately and professionally
6. Systematically request reviews from satisfied clients

The Review Response Formula

For positive reviews: Thank + Personalize + Reinforce commitment

"Thank you so much, [Name]! We're thrilled that [specific thing they mentioned]. Our whole team is committed to providing the best possible care for your family."

For negative reviews: Acknowledge + Apologize + Take offline

"We're sorry to hear about your experience, [Name]. This isn't the standard we hold ourselves to. Please reach out to me directly at [phone/email] so we can discuss this and make it right."

Networking and Community Outreach

Building relationships that extend your reach and reputation

Building Your Professional Network

Your professional network extends beyond direct referral sources. Building relationships with other professionals who serve the same population creates a web of mutual referrals and collaboration.

Key Networking Partners

Partner Type	Why They Matter	How to Connect
Elder Law Attorneys	Advise families on long-term care planning	Offer to be a care resource for their clients
Financial Advisors	Help families plan for care costs	Educational partnerships, co-hosted events
Home Health Agencies	Provide medical care, need non-medical partners	Cross-referral relationships
Hospice Organizations	Patients need non-medical support	Complementary care partnerships
Senior Move Managers	Help with downsizing, often identify care needs	Mutual referrals
Geriatric Care Managers	Coordinate care for families	Be a trusted provider on their list

Networking Organizations to Join

- **Local Chamber of Commerce** - General business networking
- **BNI (Business Network International)** - Structured referral groups
- **Aging Life Care Association** - Geriatric care professionals
- **Home Care Association of America** - Industry organization
- **State Home Care Association** - Local industry group
- **Rotary, Kiwanis, Lions Club** - Civic organizations

The "Givers Gain" Philosophy

The most successful networkers focus on giving referrals first. When you consistently help others grow their businesses, they naturally want to return the favor. Track the referrals you give and follow up to ensure they went well.

Community Events and Sponsorships

Being visible in your community builds brand awareness and trust. Families are more likely to choose an agency they've seen supporting local causes.

Event Opportunities

- **Health Fairs:** Set up a booth, offer blood pressure checks, provide information
- **Senior Expos:** Connect directly with seniors and families
- **Walk/Run Events:** Sponsor Alzheimer's Walk, Heart Walk, etc.
- **Educational Workshops:** Host your own events on caregiving topics
- **Community Festivals:** General visibility in your service area

Sponsorship Ideas

- Senior center holiday party or monthly birthday celebration

- Church senior ministry events
- Little League or youth sports teams (shows community commitment)
- Local hospital foundation events
- Meals on Wheels or food bank programs

Health Fair Booth Checklist

- Professional table banner or backdrop with logo
- Brochures and business cards
- Giveaway items (pens, magnets, stress balls with your logo)
- Sign-up sheet for newsletter or free consultation
- Interactive element (spin wheel, quiz, blood pressure checks)
- Candy or treats to draw people in
- iPad/tablet for capturing leads digitally
- Pop-up tent if outdoors

Strategic Partnerships

Strategic partnerships go beyond networking to create formal relationships that benefit both parties. These can be powerful growth drivers.

Partnership Models

Referral Agreements

Formal agreement to refer clients to each other when appropriate. Example: You refer to a home health agency; they refer non-medical needs to you.

Co-Marketing

Joint marketing efforts that benefit both parties. Example: Co-host a workshop with an elder law attorney on "Planning for Home Care."

Preferred Provider

Become the recommended provider for another organization. Example: A senior living community recommends you for residents who need extra support.

Educational Partnership

Provide ongoing education in exchange for exposure. Example: Monthly lunch-and-learn at a physician's office.

Building a Partnership

1. **Identify the opportunity:** Who serves your clients before or after you do?
2. **Research the organization:** Understand their business and needs
3. **Develop a value proposition:** What's in it for them?
4. **Make the approach:** Request a meeting to discuss mutual benefit
5. **Propose a trial:** Start small to prove the concept works
6. **Measure and adjust:** Track results and refine the partnership
7. **Formalize if successful:** Create a written agreement if appropriate

Script: Proposing a Partnership

You: "I've been thinking about how we might be able to help each other. You serve families who are planning for long-term care, and we provide the care they eventually need. What if we created a referral relationship where you introduce families to us when they're ready for care, and we refer families to you when they need help with legal or financial planning? I

think we could both benefit, and more importantly, it would make things easier for the families we serve."

Client Acquisition Funnel

Converting inquiries into long-term clients

Understanding the Client Journey

Every client goes through a journey from first awareness of your agency to becoming a loyal customer. Understanding this journey helps you optimize each touchpoint.

The Home Care Client Journey



Awareness

Family realizes they need help. They may search online, ask their doctor, or hear about you from a friend.

Research

They visit your website, read reviews, compare options. They're looking for trust signals.

Inquiry

They call or fill out a form. This is your first real conversation with them.

Consultation

In-home assessment where you meet the client and family, understand needs, build relationship.

Decision

Family chooses whether to start care. Price, trust, and fit all factor in.

● Onboarding

Care begins. First impressions with the caregiver are critical.

● Retention

Ongoing care. Quality, communication, and consistency keep them with you.

Converting Inquiries to Clients

The inquiry call is often your first real interaction with a potential client. How you handle this call dramatically impacts your conversion rate.

The Inquiry Call Framework

1. **Warm welcome:** Answer quickly, be friendly, show you care
2. **Listen first:** Understand their situation before talking about yourself
3. **Show empathy:** Acknowledge that this is difficult for them
4. **Ask questions:** Gather information about needs, timeline, concerns
5. **Provide information:** Explain how you can help (specific to their needs)
6. **Address concerns:** Anticipate and answer common questions
7. **Set next step:** Schedule the in-home consultation

Inquiry Call Script

Answer: "Thank you for calling [Agency Name], this is [Name]. How can I help you today?"

Listen: Let them explain their situation. Don't interrupt.

Empathize: "Thank you for sharing that with me. I can hear how much you care about [Mom/Dad/your spouse]. Making sure they have the right support is so important."

Ask: "To make sure I understand your needs, can I ask a few questions?"

- "What kind of help are you looking for?" (personal care, companionship, etc.)
- "How many hours per week are you thinking?"
- "When are you hoping to start?"
- "Is your [family member] living at home, or in a facility?"

Explain: "Based on what you've described, I think we can definitely help. [Briefly explain relevant services]. The next step would be for us to come meet [client's name] and do a free in-home assessment. There's no obligation - it just helps us understand exactly what's needed and give you accurate information."

Schedule: "What day would work best for you? We have availability on [Day] and [Day]."

Common Objections and Responses

Objection	Response
"How much does it cost?"	"Our rates depend on the level of care needed and how many hours per week. Most clients pay between \$X-\$Y per hour. The in-home assessment helps us give you an exact quote."
"We're just looking around"	"That's completely understandable - this is an important decision. Would it help to schedule a free assessment so you have all the information you need when you're ready to decide?"
"My parent doesn't want help"	"That's very common. Many seniors are hesitant at first. We find that starting with companionship - someone to talk to, play cards with, go for walks - often makes the transition easier."
"We can't afford it"	"I understand cost is a concern. Are you aware that long-term care insurance, VA benefits, or Medicaid may help cover the cost? We can also discuss different care levels to find something that fits your budget."

The Intake Process

The in-home consultation is your opportunity to build trust, demonstrate expertise, and close the sale. This is where relationships are made.

Consultation Best Practices

- Arrive on time and professionally dressed
- Bring materials: brochure, care plan template, business cards
- Spend time with the client, not just the family
- Walk through the home and note safety concerns
- Ask about routines, preferences, interests
- Discuss caregiver matching and what makes a good fit
- Review pricing clearly with no hidden fees
- Ask for the business: "Would you like to get started?"
- If they need time, set a follow-up date

Post-Consultation Follow-Up

If the family doesn't sign up immediately:

1. Send a thank-you email within 24 hours
2. Call within 48-72 hours to check in
3. Continue following up weekly until they decide
4. Add to your email newsletter for ongoing nurturing

Post-Consultation Email Template

Subject: Great meeting you today - Next steps for [Client's Name]

Dear [Family Contact Name],

It was wonderful meeting you and [Client's Name] today. Thank you for inviting us into your home and sharing your family's story with us.

Based on our conversation, I've attached a proposed care plan that includes [brief summary of recommended services]. The total weekly cost would be approximately [amount] based on [hours] per week.

I know this is an important decision, and I want you to take whatever time you need. I'm here to answer any questions that come up. I'll give you a call in a few days to check in, but please don't hesitate to reach out before then.

[Your Name]

[Agency Name]

[Phone]

The Fortune Is in the Follow-Up

Studies show that 80% of sales require five or more follow-ups, but most salespeople stop after one or two. Don't be pushy, but do be persistent. Each touchpoint is an opportunity to build trust and be there when they're ready.

30-60-90 Day Marketing Plan

Your action roadmap for the first three months

Days 1-30: Foundation Building

The first 30 days are about getting your foundation in place. Don't rush to make sales calls before you have the basics ready.

Week 1: Brand and Materials

- Finalize your Unique Value Proposition
- Create or refine your logo and brand colors
- Design and print business cards
- Create a professional brochure
- Design a one-page service overview for referral sources
- Create referral pads with your contact information

Week 2: Digital Presence

- Launch or update your website
- Claim and optimize your Google Business Profile

Set up Facebook business page

Claim profiles on Caring.com, A Place for Mom

Set up a professional email signature

Create a CRM or tracking system for leads and referrals

Week 3: Referral Source Research

List all hospitals in your service area

Identify discharge planner contacts for each

List skilled nursing/rehab facilities in your area

Identify geriatricians and relevant physician practices

Research senior centers and community organizations

Create a target list of 50 referral sources

Week 4: Initial Outreach

Call 5 discharge planners to introduce yourself

Visit 3 hospitals to drop off materials

Connect with 2 senior centers

Attend one networking event

Ask 3 past clients for Google reviews

Post 3x on social media

50

REFERRAL SOURCES
IDENTIFIED

10

INITIAL CONTACTS
MADE

3

IN-PERSON VISITS

Days 31-60: Active Outreach

With your foundation in place, it's time to actively build relationships. This month is about consistent, daily outreach.

Weekly Rhythm

Day	Activity	Time
Monday	Plan week, review leads, follow-up calls	2 hours
Tuesday	Referral source visits (hospitals)	3-4 hours
Wednesday	Phone calls and emails to referral sources	2 hours
Thursday	Referral source visits (SNFs, physicians)	3-4 hours
Friday	Community outreach, social media, review week	2 hours

Month 2 Goals

Visit each hospital discharge department 2x

- Make contact with 20 new referral sources
- Attend 2 networking events
- Give 1 presentation at a senior center or community group
- Collect 5 more Google reviews
- Post on social media 3x per week
- Send monthly email newsletter to contacts
- Track all activities in your CRM

The "Pop-By" Strategy

Keep a box of treats (donuts, cookies, fruit) in your car. When you're in an area, do a quick pop-by to a referral source. "I was in the neighborhood and thought I'd drop these off and say hi." These small touches build relationships over time.

Days 61-90: Scaling Success

By month three, you should be seeing some referrals coming in. Now it's about doubling down on what works and refining your approach.

Analyze and Optimize

Review your first 60 days:

- Which referral sources have sent clients?
- Which activities have produced the best results?
- Where are you spending time with little return?

- What objections are you hearing most often?
- What's your inquiry-to-client conversion rate?

Month 3 Focus Areas

- Double down on your top 10 referral sources
- Create a formal referral partnership with at least one organization
- Host or co-host an educational event
- Implement a systematic review collection process
- Create a client referral program (ask happy families for referrals)
- Consider paid advertising if budget allows (Google Ads, Facebook)
- Hire or train staff on inquiry handling if volume is increasing

100+

REFERRAL SOURCE
TOUCHES

15+

ACTIVE REFERRAL
RELATIONSHIPS

10+

CLIENT INQUIRIES

90-Day Marketing Calendar Template

Weekly Activity Tracker

Activity	Week 1	Week 2	Week 3	Week 4	Monthly Total
In-person visits					

Phone calls made

Emails sent

Networking events

Social media posts

Client inquiries received

Consultations scheduled

New clients started

Budget Templates and Tracking Metrics

Managing your marketing investment for maximum ROI

Marketing Budget Framework

How much should you spend on marketing? While there's no one-size-fits-all answer, here's a framework to help you allocate your resources effectively.

Budget Guidelines by Stage

Stage	Revenue	Marketing Budget	Focus Areas
Startup (Year 1)	\$0-\$250K	10-15% of revenue goal	Brand, website, referral outreach
Growth (Year 2-3)	\$250K-\$1M	7-10% of revenue	Scaling referrals, digital presence
Established (Year 4+)	\$1M+	5-7% of revenue	Maintaining presence, expansion

Startup Marketing Budget (Sample: \$15,000/year)

Year 1 Marketing Budget Template				
Category	Item	One-Time	Monthly	Annual
Brand/Print	Logo design	\$500	-	\$500
	Business cards (1000)	\$100	-	\$100

	Brochures (500)	\$400	-	\$400
	Referral pads (500)	\$200	-	\$200
Digital	Website design	\$2,000	-	\$2,000
	Website hosting	-	\$30	\$360
	Email marketing tool	-	\$30	\$360
Outreach	Treats/gifts for referral sources	-	\$150	\$1,800
	Networking memberships	\$500	-	\$500
	Event sponsorships	-	\$200	\$2,400
Advertising	Google Ads	-	\$300	\$3,600
	Facebook Ads	-	\$150	\$1,800
Miscellaneous	Travel, supplies, contingency	-	\$100	\$1,200
TOTAL			\$960	\$15,220

Start Lean

You don't need to spend all this money right away. Many successful agencies started with just business cards, a simple website, and lots of shoe leather. Invest in relationships first - the paid advertising can come later when you have cash flow.

Key Performance Indicators (KPIs)

You can't improve what you don't measure. Track these metrics to understand what's working and where to focus your efforts.

Marketing KPIs

Metric	What It Tells You	Target
Referral source visits/month	Your outreach activity level	20+ visits/month
New referral relationships	Pipeline growth	5-10 new/month
Inquiries received	Marketing effectiveness	Varies by market
Inquiry source breakdown	Which channels work	Track all sources
Consultation rate	Inquiry quality/handling	70%+ of inquiries
Close rate	Sales effectiveness	50%+ of consultations
Cost per inquiry	Marketing efficiency	Track and improve
Cost per new client	Customer acquisition cost	\$200-500 typical

Referral Source Tracking

Track every referral source to understand which relationships are producing results:

Referral Source Tracker Template

Source Name	Type	Contact	Last Visit	Referrals YTD	Clients Started
Memorial Hospital	Hospital	Jane Smith			
Sunrise SNF	SNF	John Doe			
Dr. Johnson	Physician	Office Manager			

Tracking Spreadsheet Templates

Marketing Activity Log

Track your daily marketing activities to ensure consistency and identify patterns:

Daily Activity Log

Date	Activity Type	Contact/Organization	Notes	Follow-Up Needed
	Visit / Call / Email			

Lead Tracking

Lead Tracker

Date	Client Name	Source	Services Needed	Consult Date	Status	Start Date
					New / Consult / Won / Lost	

Monthly Marketing Dashboard

Monthly Dashboard						
Metric	Jan	Feb	Mar	Apr	May	Jun
Referral source visits						
New relationships						
Inquiries received						
Consultations held						
New clients started						
Marketing spend						
Cost per new client						

Review Metrics Weekly

Set aside 30 minutes every Friday to review your numbers. Ask yourself: What worked this week? What didn't? What will I do differently next week? Consistent review and adjustment is what separates top performers from average ones.

Putting It All Together

Your path to marketing success

Your Marketing Success Checklist

You now have everything you need to build a successful home care marketing program. Here's a final checklist to ensure you're ready:

- Defined your Unique Value Proposition
- Created professional brand materials
- Launched your website and Google Business Profile
- Built your referral source target list
- Memorized your key scripts
- Set up your tracking systems
- Committed to your 30-60-90 day plan
- Blocked time in your calendar for marketing activities

Remember These Principles

Relationships First

Consistency Wins

Marketing in home care is about building trust over time. Invest in relationships, not just transactions.

Show up every week, every month. Marketing is a marathon, not a sprint.

Track Everything

Know your numbers. Double down on what works, fix or eliminate what doesn't.

Deliver Excellence

The best marketing is exceptional care. Happy clients and families are your best ambassadors.

Need More Help?

This playbook gives you the foundation for home care marketing success. But if you want personalized guidance, we're here to help.

Home Care Agency Blueprint(TM)

Our comprehensive program includes everything you need to start and grow a successful home care agency - from licensing to marketing to operations. Visit **homecareagencyblueprint.com** to learn more about how we can help you build the business of your dreams.

Home Care Agency Blueprint(TM)

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