

HCAB  
Home Care Agency Blueprint  
Building Successful Home Care Businesses

# **Sales & Referral Scripts**

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Proven Conversation Frameworks

Complete Script Kit

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# How to Use These Scripts

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Welcome to the Sales & Referral Scripts Bundle. These scripts are designed to be your foundation for building strong client relationships and referral partnerships. They're not meant to be read word-for-word like a telemarketer - they're frameworks to guide natural, professional conversations.

## Key Principles for Success

- **Practice out loud** - Read these scripts until they feel natural, then adapt them to your voice
- **Listen more than you speak** - Use these as guides, but follow the conversation
- **Personalize everything** - Fill in bracketed sections with specific details
- **Stay flexible** - Be ready to deviate when the conversation requires it
- **Take notes** - Document what you learn for follow-up and relationship building

# Tone, Pacing & Voice Guidelines

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## The Right Tone

Your tone should convey warmth, professionalism, and genuine care. You're not selling a product - you're offering a solution to help families during a challenging time. Every conversation should feel like talking to a knowledgeable, compassionate friend.

### Tone Checklist

- **Warm but professional** - Friendly without being overly casual
- **Confident but not pushy** - Know your value without being aggressive
- **Empathetic** - Acknowledge emotions and concerns genuinely
- **Patient** - Never rush; families need time to process
- **Knowledgeable** - Be prepared to answer questions authoritatively

## Pacing Guidelines

- **Speak at 75% of your normal speed** - Especially when discussing care needs or pricing
- **Pause after important points** - Let information sink in
- **Match their energy** - If they're anxious, slow down and reassure; if they're ready to act, match their momentum
- **Use silence strategically** - After asking a question, wait for the full answer

## Handling Common Responses

### When They Say "Let me think about it"

Don't panic. This is normal. Respond with: "Absolutely, this is an important decision. What specific questions can I help you think through?" This keeps the conversation going and identifies their real concerns.

### When They Get Emotional

Pause. Let them express their feelings. Say something like: "I can hear how much you care about [Mom/Dad/your loved one]. That's exactly why we do what we do - to support families like yours." Give them space before continuing.

### When They Ask About Pricing First

Guide them back to needs first: "I'd be happy to discuss pricing - and I want to make sure I give you accurate information. Could you tell me a bit about [your loved one's] situation first so I can give you the right quote?" This builds value before discussing cost.

# Sales Call Scripts

## Initial Inquiry Call Script

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Use this script when a potential client calls your agency for the first time. Your goals are to: (1) build rapport, (2) understand their needs, (3) position your agency as the solution, and (4) schedule an in-home assessment.

### 1 Opening & Warm Welcome

**YOU:**

"Good [morning/afternoon], thank you for calling [Agency Name]. This is [Your Name], how can I help you today?"

**TIP:** Smile when you answer - they can hear it in your voice. Let them explain their situation fully before responding.

### 2 Discovery Questions

**YOU:**

"I'd love to learn more about your situation so I can see how we might help. Could you tell me a little about [your loved one/the person who needs care]?"

**Key questions to weave into conversation:**

- "What's prompting you to look into home care right now?"
- "What kinds of activities are becoming challenging?"
- "Is [he/she] living alone, or with family?"

- "Have you had any experience with home care before?"
- "What would the ideal situation look like for your family?"

### 3 Acknowledge & Empathize

**YOU:**

"Thank you for sharing that with me. I can hear how much you care about [Mom's/Dad's/their] wellbeing. It takes a lot of love to make this call, and I want you to know we're here to make this easier for your whole family."

### 4 Position Your Agency

**YOU:**

"Based on what you've shared, I think we can definitely help. At [Agency Name], we specialize in [your specialty - e.g., companion care, personal care, dementia care]. We carefully match our caregivers with clients based on personality and needs, and we're known for our reliability and communication with families."

### 5 Bridge to Assessment

**YOU:**

"The best next step would be for me to come meet [Client Name] in person. This lets me really understand [his/her] needs, answer all your questions, and put together a personalized care plan. There's no obligation, and it's completely free. Would [day] or [day] work better for you?"

**ALWAYS:** Offer two specific options rather than an open-ended "when works for you?"

# Follow-Up Call Script

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Use this script when calling back someone who inquired but didn't schedule an assessment, or who requested time to think.

## 1 Warm Re-Introduction

**YOU:**

"Hi [Name], this is [Your Name] from [Agency Name]. We spoke [last week/a few days ago] about care for [their loved one]. I wanted to follow up and see how things are going. Is this still a good time to chat?"

## 2 Check In on Their Situation

**YOU:**

"I've been thinking about your situation with [specific detail they shared]. How has [Mom/Dad/the client] been doing since we last talked?"

**KEY:** Referencing specific details shows you listened and care. Always review your notes before calling.

## 3 Address Any New Concerns

**YOU:**

"Last time we talked, you mentioned wanting to [think about it/discuss with family/check your budget]. Have you had a chance to do that? What questions came up that I can help answer?"

## 4 Gentle Urgency

### YOU:

"I know these decisions take time, and I don't want to rush you. I did want to mention that our schedule fills up [1-2 weeks/a few weeks] in advance, so if you're thinking about starting care in [month], now would be a good time to do the assessment so we can reserve our best caregiver matches for you."

## 5 Secure Next Step

### YOU:

"Would it make sense to go ahead and schedule that free assessment? Even if you're not ready to start care right away, it gives you all the information you need to make the decision when the time is right."

# In-Home Assessment Consultation Script

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This script guides your in-person assessment visit. Your goals are to: build trust, thoroughly assess needs, present your services, address concerns, and close the sale.

## 1 Arrival & Rapport Building

### YOU:

"Hi [Family Member Name], thank you so much for having me. And you must be [Client Name] - it's wonderful to meet you. What a lovely home you have."

### Spend 5-10 minutes on small talk:

- Comment on photos, pets, decor - find connection points
- Ask about their history in the home
- Let the client share stories - this builds trust

## 2 Transition to Assessment

### YOU:

"I'd love to learn more about your daily routine, [Client Name], so we can figure out the best way to support you. Would you mind walking me through a typical day?"

### Assessment areas to cover:

- Morning routine (waking, bathing, dressing, breakfast)
- Mobility and fall risk
- Meal preparation and nutrition
- Medication management
- Social activities and hobbies
- Evening routine and sleep

- Home safety (stairs, bathroom, lighting)

### 3 Engage the Client Directly

#### TO CLIENT:

"[Client Name], what matters most to you about staying in your home? What would make your days easier or more enjoyable?"

**IMPORTANT:** Always address the client directly, not just the family member. They need to feel respected and included in their own care decisions.

### 4 Present Your Recommendation

#### YOU:

"Based on everything you've shared, here's what I'd recommend. [Client Name] would benefit from [X hours] of care, [X days] per week. Our caregiver would help with [specific tasks], and we'd focus on [their stated priorities - safety, companionship, etc.]."

#### YOU:

"For this level of care, the investment is [rate] per hour. Many families in similar situations find this gives them peace of mind knowing [Mom/Dad] is safe and well-cared for, while still maintaining their independence at home."

### 5 Address Questions

#### YOU:

"What questions do you have about how this would work?"

#### Be prepared to discuss:

- Caregiver selection and matching process
- What happens if a caregiver calls out

- Communication and updates to family
- Insurance, bonding, and background checks
- How billing works
- Flexibility to adjust hours

# Objection Handling Scripts

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Objections are opportunities to understand concerns and provide reassurance. Never argue - acknowledge, empathize, then address.

## "It's too expensive"

### WHAT THEY SAY:

"This is more than we expected. We're not sure we can afford this."

### YOUR RESPONSE:

"I completely understand - home care is an investment, and I want to make sure it makes sense for your family. Let me ask you this: what would it cost - in time, stress, and lost work - if you didn't have this support?"

Many families start with fewer hours than we recommended and adjust as needed. We could begin with [X hours] and see how it goes. Would that be more comfortable to start?"

**ALTERNATIVE APPROACH:** "Have you looked into whether [Client Name] has any long-term care insurance or veteran's benefits? We can help you navigate that - some families are surprised by what's covered."

## "We're not ready yet"

### WHAT THEY SAY:

"We want to wait and see how things go. We're not ready to start care yet."

### YOUR RESPONSE:

"I appreciate that - timing is important. Can I ask what would need to happen for you to feel ready? What would be the sign that it's time?"

[Listen to their answer, then respond:]

"That makes sense. Here's something to consider: most families tell us they wish they'd started care sooner. Waiting until there's a crisis - a fall, or caregiver burnout - often means making rushed decisions. Starting with even a few hours now lets [Client Name] build a relationship with a caregiver while things are stable."

## "We're talking to other agencies"

### WHAT THEY SAY:

"We're meeting with a couple other agencies before we decide."

### YOUR RESPONSE:

"That's smart - you should feel confident in your choice. As you compare agencies, here are some questions worth asking:

- What's their caregiver turnover rate?
- Who covers if a caregiver is sick?
- How do they handle problems or complaints?
- Can you meet the caregiver before starting?

I'd be happy to share how we handle each of these. What matters most to you in making this decision?"

## "Mom/Dad doesn't want help"

### WHAT THEY SAY:

"My mother is very independent. She insists she doesn't need anyone."

**YOUR RESPONSE:**

"That independence is actually a wonderful quality - and we want to protect it. This is really common, and here's what often works:

Instead of presenting it as 'help,' we frame it as companionship or household assistance. We could introduce the caregiver as someone to help with housekeeping or to be a companion for activities. Once they build a relationship, most clients welcome the support.

Would it help if I met with [Mom/Dad] alone first, without the family present? Sometimes that removes the pressure they might feel."

# Closing Scripts

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Closing should feel natural, not pushy. You're helping them take the next step toward peace of mind.

## **A** The Assumptive Close

**YOU:**

"It sounds like we're a great fit for what [Client Name] needs. Let's talk about getting started. Would you like to begin this week, or would next Monday work better?"

## **B** The Summary Close

**YOU:**

"So just to summarize: we'll have a caregiver here [days] from [time] to [time], helping with [specific tasks]. This gives you [stated benefits - peace of mind, time back, etc.]. The investment is [amount] per week. How does that sound?"

[Wait for response. If positive:]

**YOU:**

"Wonderful. Let me get the paperwork started so we can reserve your spot on our schedule."

## **C** The Trial Close

**YOU:**

"I know this is a big decision. What if we started with a two-week trial? This lets [Client Name] meet the caregiver, get comfortable, and you can see firsthand how it works. If it's not the right fit, there's no long-term commitment. Would that give you the confidence to move forward?"

## **D The Urgency Close**

### **YOU:**

"I want to be transparent with you - we have a caregiver right now who would be perfect for [Client Name]. She's [describe personality/experience]. She's one of our most requested caregivers, and I'd hate for her to get assigned elsewhere before you decide. If you're ready, I can reserve her for you today."

## **Upselling Additional Services Script**

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Use this script after care has been established and the family is satisfied, typically 2-4 weeks in.

### **1 Check In First**

#### **YOU:**

"Hi [Name], I wanted to check in and see how things are going with [Caregiver Name] and [Client Name]. How has the first few weeks been?"

[Let them share positive feedback, address any concerns first]

### **2 Identify the Opportunity**

#### **YOU:**

"I'm so glad to hear that. [Caregiver Name] mentioned that [Client Name] has been [observation - e.g., really enjoying their time together, mentioning they get lonely on weekends, etc.]. Have you thought about adding [additional service - more hours, weekend coverage, overnight care]?"

### **3 Present the Value**

**YOU:**

"A lot of families in your situation find that adding [X] really makes a difference. It would mean [specific benefit - you can take that weekend trip, Mom has someone there during the harder evening hours, etc.]. Would you like me to add that to your schedule?"

# Referral Source Scripts

## Cold Call Script for Discharge Planners

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Hospital discharge planners and social workers are key referral sources. They need agencies they can trust to provide reliable care for discharged patients.

### 1 Getting Past the Gatekeeper

**YOU:**

"Good morning, this is [Your Name] with [Agency Name]. I'm calling to speak with whoever handles discharge planning for patients who need home care. Who would be the best person to connect with?"

**TIP:** Sound confident and professional, like you belong. Don't ask "May I speak to..." - state your purpose directly.

### 2 Introduction to Discharge Planner

**YOU:**

"Hi [Name], this is [Your Name] with [Agency Name], a [licensed/certified] home care agency here in [City]. I know you're busy, so I'll be brief. I'm reaching out because we specialize in helping patients transition safely from hospital to home, and I'd love to be a resource for your team when you have patients needing non-medical home care. Do you have two minutes?"

### 3 Value Proposition

**YOU:**

"What sets us apart is our responsiveness. We can often start care within 24-48 hours of discharge, we communicate proactively with families, and we have a dedicated line for referral sources so you're never left wondering about a patient's status. We also provide detailed care notes that can be shared with the care team."

### 4 The Ask

**YOU:**

"I'd love to drop off some information and introduce myself in person. Would [day] or [day] work for a quick 10-minute visit? I'll bring coffee."

[If they decline a visit:]

**YOU:**

"I understand you're busy. Would it be alright if I emailed you our information? That way you have us in your resources when a patient needs non-medical care. What's the best email to reach you?"

# Cold Call Script for Physicians' Offices

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Physician practices, especially geriatricians, family medicine, and specialists treating chronic conditions, regularly encounter patients who need home care support.

## 1 Getting to the Right Person

**YOU:**

"Good morning, this is [Your Name] with [Agency Name]. I'm reaching out to practices that serve seniors. Who in your office handles community resources or care coordination for patients?"

## 2 Introduction

**YOU:**

"Hi [Name], I'm [Your Name] with [Agency Name]. We're a local home care agency, and I'm reaching out because we frequently support patients of practices like yours - helping with medication reminders, mobility, meal preparation, and daily activities so patients can stay safely at home. I'd love to be a resource Dr. [Name] can recommend when patients or families ask about home care options."

## 3 The Value to Them

**YOU:**

"What makes us a good partner for your practice is that we can help reduce missed appointments and improve medication compliance - which I know impacts patient outcomes. We provide care notes that families can share with the doctor, and we're always happy to communicate with your office about any concerns we observe."

## 4 Request a Meeting

**YOU:**

"I'd love to bring by some brochures and introduce myself. I could also bring lunch for the staff one day if that's easier. Would that be something your office is open to?"

# Cold Call Script for Senior Centers

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Senior center directors and program coordinators interact daily with seniors and their families. They're trusted resources in the community.

## 1 Introduction

**YOU:**

"Hi, this is [Your Name] with [Agency Name], a local home care agency. I'm reaching out because I know the seniors you serve often ask about resources for care at home, and I'd love to be a trusted option you can recommend. Is this a good time for a quick chat?"

## 2 Build the Connection

**YOU:**

"We serve a lot of seniors in [neighborhood/area], helping them with everything from companionship to personal care. Our goal is really to help people stay independent in their homes as long as possible - which I know aligns with what you do here at the center."

## 3 Offer Value

**YOU:**

"I'd love to support your center in some way. Would you be open to me presenting a free educational session for your members - something like 'How to Have the Home Care

Conversation with Your Family' or 'Staying Safe at Home as You Age'? It would be purely educational, and I think your members would find it valuable."

#### 4 Exchange Information

**YOU:**

"Could I drop off some brochures for your resource area? And I'd be happy to be listed as a community resource your staff can recommend when families ask. What's the best way to stay in touch?"

# Follow-Up Call After Referral

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When a referral source sends you a patient/client, always follow up to close the loop. This builds trust and encourages future referrals.

## 1 Thank and Update

**YOU:**

"Hi [Referral Source Name], this is [Your Name] from [Agency Name]. I wanted to thank you for referring [Client Name] to us and give you a quick update. We were able to start care [yesterday/this week], and things are going smoothly so far. [Client Name] is working with [Caregiver Name], and the family seems very relieved to have the support in place."

## 2 Reinforce the Relationship

**YOU:**

"We really appreciate you thinking of us. Please don't hesitate to reach out anytime you have a patient who could benefit from home care - we make it a priority to take excellent care of anyone you refer."

# Thank You Call After Placement

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After a referred client has been receiving care for 2-4 weeks and things are going well, make a thank-you call.

## 1 Express Gratitude

**YOU:**

"Hi [Name], this is [Your Name] from [Agency Name]. I just wanted to call and thank you again for referring [Client Name] to us a few weeks ago. The family has been wonderful to work with, and [Client Name] is doing really well with our caregiver."

## 2 Share a Positive Outcome

### YOU:

"I thought you'd like to know that [share a brief positive update - e.g., 'Mrs. Johnson's daughter mentioned she hasn't worried about her mom falling since we started, and she's finally able to focus on work again']. It's referrals like yours that let us help families like this."

## 3 Keep the Door Open

### YOU:

"We're always here if you have other patients who need home care support. Is there anything I can do for your team?"

# Relationship Maintenance "Check-In" Call

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Every 4-6 weeks, check in with your key referral sources even if they haven't sent a referral recently.

## 1 Friendly Check-In

### YOU:

"Hi [Name], this is [Your Name] from [Agency Name]. I was thinking about you and wanted to check in. How have things been at [Hospital/Practice/Center]?"

## 2 Offer Value

**YOU:**

"I wanted to let you know we've [share news - expanded services, hired new caregivers, added weekend availability, etc.]. I thought it might be helpful for any patients who need [specific service]. Also, I have some updated brochures if you need them for your resource area."

## 3 Make It Easy to Refer

**YOU:**

"Just a reminder - if you ever have a patient who needs home care, you can call me directly at [phone] or email [email]. I always prioritize referrals from your team and can usually have care started within 24-48 hours."

# Voicemail Scripts

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Keep voicemails brief (under 30 seconds), clear, and action-oriented.

## **A** First Outreach Voicemail

**YOU:**

"Hi [Name], this is [Your Name] with [Agency Name], a local home care agency. I'm reaching out to introduce our services and see how we might support your [patients/members/families]. I'd love to schedule a brief call or visit at your convenience. You can reach me at [phone number] - that's [repeat phone number]. Looking forward to connecting."

## **B** Follow-Up Voicemail

**YOU:**

"Hi [Name], [Your Name] from [Agency Name] again. I left you a message last week about our home care services. I know you're busy, so I'll keep trying. In the meantime, I'm emailing you some information. Feel free to reach out anytime at [phone number]. Have a great day."

## **C** Value-Add Voicemail

**YOU:**

"Hi [Name], this is [Your Name] with [Agency Name]. I wanted to share that we've just expanded our [evening/weekend/dementia care] services and can now help patients who need [specific need]. If you have anyone who might benefit, I'm here to help. My number is [phone]. Hope to connect soon."

## **D Thank You Voicemail**

### **YOU:**

"Hi [Name], [Your Name] from [Agency Name]. I just wanted to call and thank you for referring [Client Name] to us. We started care this week and everything is going smoothly. We really appreciate you thinking of us, and we're here anytime you need us. Take care."

### **Voicemail Best Practices**

- **Slow down** - Speak slower than feels natural, especially your phone number
- **Repeat your number** - Always say it twice
- **Sound upbeat** - Smile while you talk; energy carries through
- **Keep it under 30 seconds** - Respect their time
- **State the benefit** - Why should they call back?

# Email Outreach Templates

## Initial Outreach Email to Hospitals

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**Subject:** Local Home Care Resource for Your Discharge Team

Hi [Name],

I hope this message finds you well. My name is [Your Name], and I'm the [title] at [Agency Name], a licensed home care agency serving [City/Region].

I'm reaching out because I know your discharge planning team works hard to ensure patients have the support they need when they leave the hospital. We specialize in non-medical home care - helping patients with daily activities, medication reminders, mobility, and companionship - so they can recover safely at home and avoid readmissions.

**What makes us a reliable partner:**

- 24-48 hour care start time for most referrals
- Dedicated referral line: [phone] (you'll always reach a person)
- Proactive communication with families and care teams
- Fully bonded, insured, and background-checked caregivers

I'd love the opportunity to introduce myself and drop off information for your team. Would you have 10 minutes this week or next for a brief visit?

Thank you for the important work you do. I look forward to being a resource for your team.

Warm regards,

[Your Name]

[Title]

[Agency Name]

[Phone] | [Email]  
[Website]

## Initial Outreach to Physicians

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**Subject:** Home Care Resource for Your Senior Patients

Hi [Name],

I'm reaching out to introduce [Agency Name], a local home care agency serving families in [City/Region].

Many of Dr. [Physician Name]'s patients likely ask about home care options for themselves or aging family members. We'd be honored to be a resource your practice can recommend with confidence.

Our caregivers help patients with:

- Medication reminders and appointment preparation
- Mobility assistance and fall prevention
- Meal preparation and nutrition support
- Companionship and cognitive engagement
- Transportation to appointments

We're happy to keep your office informed about any concerns we observe, helping you provide better continuity of care.

Would your practice be open to a quick visit? I'd love to bring brochures and learn more about how we can support your patients.

Best regards,

[Your Name]

[Agency Name]

[Phone] | [Email]

# Follow-Up Email Sequence

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Use this sequence when you haven't heard back from your initial outreach.

**Email #1** (Send 4-5 days after initial email)

**Subject:** Following up - Home Care Resource

Hi [Name],

I wanted to follow up on my email from last week about [Agency Name], our local home care agency.

I know your schedule is demanding, so I'll keep this brief: we're here whenever you have a patient or family asking about home care. You can reach me directly at [phone] or simply reply to this email.

Would a quick 5-minute call work better than a visit? I'm happy to work around your schedule.

Best,

[Your Name]

**Email #2** (Send 7-10 days after Email #1)

**Subject:** Quick question

Hi [Name],

I've reached out a couple of times about partnering with your [hospital/practice/center] on home care referrals.

I want to respect your time, so I'll ask directly: Is home care referral something your team handles, or should I be connecting with someone else?

Either way, I appreciate any direction you can offer.

Thanks,  
[Your Name]  
[Phone]

**Email #3** (Send 2-3 weeks after Email #2)

**Subject:** One last try

Hi [Name],

I'll keep this short since I haven't been able to connect with you.

If you ever need a reliable home care agency to recommend to patients, we're here. I've attached our one-page overview for your reference.

Feel free to file this away and reach out whenever the need arises. I won't keep filling your inbox - but I'm always just a call away at [phone].

Wishing you and your team all the best,

[Your Name]

[Agency Name]

## Referral Thank You Email

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**Subject:** Thank you for referring [Client First Name]

Hi [Name],

I wanted to send a quick note to thank you for referring [Client Name] and their family to [Agency Name].

We were able to start care [yesterday/this week], and things are off to a great start. [Include brief positive detail if appropriate - e.g., "The family was so relieved to have help in place before the weekend."]

Referrals from trusted partners like you mean everything to us. Please know that we take excellent care of anyone you send our way.

If there's ever anything I can do to support your team - whether that's more brochures, an in-service presentation, or just being available for quick questions - please don't hesitate to reach out.

With gratitude,

[Your Name]

[Agency Name]

[Direct Phone]

## You're Ready to Grow

These scripts are your foundation. Practice them until they feel natural, then make them your own. Remember: authenticity and genuine care will always outperform perfect delivery.

**Every call is an opportunity to help a family. Go make a difference.**

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**Home Care Agency Blueprint(TM)**

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