

**HOME CARE PULSE®**

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**Get More From Your Scores – Part 2**  
*Understanding & Acting on Client Feedback*

*A Customer Mastery Webinar Presentation by,  
Aaron Marcum, Founder of Home Care Pulse*

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**Housekeeping**

- » *Everyone is on mute*
- » **IMPORTANT** – *For the best quality audio, suggest using your telephone and not your computer’s microphone*
- » *Type your questions in the question box and we will address them at the end of the call*
- » *Please “be present” today, pretend we are in a classroom together*
- » *Please take the one question survey when leaving the presentation*

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**Get the details at**  
[www.homecarepulse.com/awards](http://www.homecarepulse.com/awards)

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**Background**

- » Aaron is a former successful private duty home care owner
- » Started Home Care Pulse in 2008. Home Care Pulse's Quality Management Program is a game changer for hundreds of agencies in North America
- » Started conducting the annual Private Duty Benchmarking Study in 2009, in partnership with the NPDA, now known as the HCAOA




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**Today's Agenda**

- » **Explore and discuss how you can improve Client Satisfaction Scores in 6 Categories** (Office Support Performance Questions)
  1. Confidence level in agency's office staff
  2. Effectiveness and frequency of the communication from agency
  3. Coordination of caregiver's schedule
  4. Agency's response to problems
  5. Receiving the service as promised
  6. Likelihood of you recommending agency to others
- » **Explore and discuss how you can produce a happier Client**

**Let's Take a Poll – Quality Management Tenure**

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**Now Showing**  
***"THE CLIENT EXPERIENCE"***

**Starring: You and Your Care Team**



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**What is Unique About The Experience You Offer Your Clients?**

- » **Professionalism** – Do your clients feel a high level of professionalism and courtesy when they call the office?
- » **Consistency** – Do your clients receive the same high level of care on every shift...from every caregiver? Are the schedules consistently staffed with the same people?
- » **Integrity** – Do your clients trust you and your team?
- » **Compassion** – Do your clients feel the depth of compassion from you, your office team, and your caregivers?
- » **Knowledgeable Staff** – Do your clients look to you and your team for counsel on everything senior care related?
- » **Safety** – Do your clients feel safe and secure when they are under your care?

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**What Are Some Client "Touch Points" That Help Create The Client Experience?**

- » Inquiry Calls
- » Assessments
- » Website
- » Home Care Pulse / Quality Management Program
- » Best of Home Care®
- » Any advertising/marketing
- » Invoices/Billing
- » After Hours Support
- » Scheduling
- » Field Supervisor Interaction
- » Executive Interaction
- » Office Communication
- » Care Plan Book
- » Caregiver Interaction

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### The Quality Management Meeting

- » Hold at least once a month
- » Include all members of your support team!
- » Take time to plan!
- » Focus on the feedback
- » Sandwich the negative between the positives
- » Make an action list
- » Sample agenda posted soon in the "Resource Tab"

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### The Meaning Behind The Scores

- ✓9-10 = Promoters – are loyal enthusiasts who will keep buying and refer others, fueling growth.
- ✓7-8 = Passives – are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- ✓1-6 = Detractors - are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

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### The Power of Client Perceptions

#### The Restaurant Cockroach

- » "If there is one, there are thousands..."
- » Are the roaches getting into the food?
- » This restaurant must be really dirty
- » I will get sick eating here
- » I'm calling the health inspectors!
- » I will never eat here again!



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### Learning to Manage Client Perceptions (Their Realities)

- » Do our clients and family members feel confident their problems will be resolved when they call us?
- » How often are we checking in with our clients?
- » Do we call our clients immediately when there is a schedule change?
- » Do we offer on-call after hours support?
- » When problems arise, do we have an effective process in place to resolve them quickly and efficiently?
- » Have we kept all of our promises we made in our initial assessment with each client/family members?
- » Are our clients referring their friends and neighbors on a regular basis?

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### Improving the "Perception" of Confidence Level in Office Staff

- » Latest Best of Home Care® Benchmark – **9.17**
- » Feedback Red Flags

- » 10 – "The office is always very responsive...they are very quick to correct any missteps."
- » 8 – "There needs to be more frequent communication between the office staff and workers...they get a lot of the information mixed up."
- » 7 – "...they told me they would email me the schedules but never have..."
- » 6 – "They never call...thank goodness for my caregivers who fill me in on what is going on."

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### Improving Perceptions – Confidence Level in Office Staff

- » Create and automate positive client "touch points" where you and your team intentionally reach out to your clients/responsible (i.e. Birthdays, gratitude, etc.)
- » Consider emailing your clients their schedules every week
- » Educate your clients on your "Unique Process." Document this process for them (i.e. How do they get a hold of you after hours, etc.)
- » You and your team must be seen as the experts, when it comes to senior care. Send out regular education pieces and even provide bi-monthly training courses for your clients.
- » Focus on your back stage performance by creating effective processes for billing, scheduling, care plans, etc.

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**Improving the "Perception" of Effective & Frequency of the Communication**

- » Latest Best of Home Care® Benchmark – **9.19**
- » Feedback Red Flags

- » 9 – "...they are always available...but they could drop in and check on the care more often."
- » 8 – "Their communication is good...but I am usually the one who has to reach out if there is a problem with a schedule."
- » 7 – "They are very difficult, if not impossible, to get a hold of on the weekends...which is when they care for my mom."
- » 6 – "For the amount of money we have invested in my Dad's care, I think they should be in closer contact with me."

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**Improving Perceptions – Communication**

- » Friday phone calls
- » Emailing schedules
- » Offer 24/7 Support...but make sure your clients/responsible parties know how to use it...make sure your "on-call" team are committed and compensated
- » NEVER keep anyone on hold more than 10 seconds...voicemail should be the last resort!
- » Create pro-active communication systems...rather than reactive.

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**Improving the "Perception" of Coordination of Schedules**

- » Latest Best of Home Care® Benchmark – **9.46**
- » Feedback Red Flags

- » 10 – "I love the new online schedule system..."
- » 8 – "Usually they are good about calling me when something changes, but..."
- » 7 – "We received a new caregiver yesterday without any heads up."
- » 5 – "It seems like we get a new care worker every week...we may need to look for a different provider."

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**Improving Perceptions – Coordination of Schedules**

- » **Friday phone calls**
- » **Post care schedules online**
- » **Email schedules**
- » **Educate your clients on the expectations and how schedule changes work** (i.e. They will get a different caregiver if they need care outside of the normal schedule, what happens when the caregiver calls in sick, what happens when there is a schedule change, etc.)
- » **One point of contact – Staffing Coordinators**
- » **Ensure your Staffing Coordinators** and other team members are well trained on how scheduling works at your agency and what your expectations are. Document it and laminate it!

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**Improving the “Perception” of Response to Problems**

- » Latest Best of Home Care® Benchmark – **9.31**
- » Feedback Red Flags

- » **10** – “They have solved problems and done so within minutes. They do not waste time...”
- » **8** – “I think if they were a little more timely to respond...I would probably give them a 10”
- » **6** – “They know I have cats...but twice they have recently sent caregivers allergic to cats.”
- » **5** – “We have complained about our caregiver and her roughness with Dad...but that was two weeks ago and nothing has changed.”

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**Improving Perception - Response to Problems**

- » **One point of contact at agency**
- » **Avoid Flippancy** - Team should understand that every complaint or problem is treated seriously...do not tolerate “flippant” behavior from team members.
- » **Executive updates** – Executive team should be updated at least weekly regarding problems and their resolution
- » **Update Clients!** - Use the phone, or whenever possible, personal visits to follow-up to see if problems were resolved to their satisfaction
- » **Educate and train clients** on how to communicate problems with your agency...who do they call and how quickly should they expect an answer back?
- » **24/7 On-call Support** – Problems don’t just occur from 9-5. The longer it takes them to reach you, the bigger the problem becomes in their minds...

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**Improving the "Perception" of Receive Services as Promised**

- » Latest Best of Home Care® Benchmark – **9.50**
- » Feedback Red Flags

- » 10 – *"The caregivers do what the agency said they would do."*
- » 7 – *"The type of care we receive largely depends on who they send us...it is not consistent."*
- » 6 – *"Usually...but I asked for a non-smoker and got a chain smoker."*
- » 5 – *"We told them no more than 20 hours a week but they keep going over and never clear it through me."*

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**Improving Perception Receiving Services as Promised**

- » **"Under promise and over deliver"** – Train all team members to live by this creed.
- » **Well executed assessment process** – Make sure expectations are clearly defined and documented for clients/other parties upfront! No surprises.
- » **"There will be problems..."** – Let clients know there will be problems but reassure and educate them on your "unique process" of handling those problems.
- » **Promises advertised should always be kept** – Set the precedence with your team that promises, even unintentional ones, are always kept

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**"We will take care of your mom 24/7."**

- » Client has severe Parkinson's and needs 24/7 in-home care.
- » First week of care, main caregiver calls "on-call" at 2am citing a personal emergency...on-call team member arrives 20 minutes later.
- » On-call team member spends the next several hours with the client until a replacement is sent in around noon that day.
- » It was a great opportunity for me to teach my team that we keep our promises!

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**Improving the "Perception" of Recommend Agency to Others**

- » Latest Best of Home Care® Benchmark – **9.50**
- » Feedback Red Flags

- » 10 – *"I would absolutely recommend them to others!"*
- » 8– *"I would probably recommend them to someone if I had the chance."*
- » 7 – *"Due to some recent issues, I would recommend them but not highly."*
- » 6 – *"Until they resolve the issue with our current caregiver, I cannot recommend them. However, I have already recommended 2 of my neighbors in the past..."*

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**Improving Perceptions -Recommend Agency-**

- » **Educate entire team on Net Promoter Score...see earlier slide.**
- » **Monthly Quality Satisfaction Meetings!** Identify your Promoters, Passives, and Detractors...take action! (Resource Tab – Sample agenda)
- » **Every complaint is a gift and opportunity** to turn a dissatisfied customer into a raving fan!
- » Make improving the **"Client Experience"** a #1 job responsibility for all team members, especially caregivers.
- » Reward and incentivize team members!
- » **Publicly and privately recognize** team members mentioned in feedback!

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**Producing More Happy Team Members**

- » **How do team members like to be recognized?**
  - Competitive pay
  - Formalized Recognition Program
    - HCP Feedback Reports – Recognize/reward when their names are mentioned in a positive light
    - Employee(s) of the month
    - Spotlights, newsletters
    - Send thank you cards to 10% of your caregivers every month!!!
    - Call and express gratitude to 5% of your caregivers every month!
    - **Empower your clients/families to join in on the recognition!**

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## In Summary

- » Perception is Reality for Clients
- » Pay Attention to Feedback
- » Hold Quality Management Meetings at least once a month, focused on improving client perceptions
- » Make it easy for your clients to communicate with you and your team
- » Create pro-active communication systems rather than reactive and disorganized ones
- » Document and educate clients on your "unique process" and what they can expect
- » "Under promise and over deliver"
- » Review and improve your Recognition Strategy. Train your team and your clients how to recognize and promote good performance.

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## New and Improved for 2013

Item	2013	2012
Overall		
In-Depth Participation Summary	Available	Available
Historical Trends	Available	Available
Top Growth Opportunities	Available	Available
Key Performance Indicators	Available	Available
Industry Resource Directory	Available	Available
Executive Summary/ Study Highlights	Available	Available
Recruitment/ Retention Section	Available	Available
40% Discount for Participants	Available	Available
Industry Leader Highlights	Available	Available
Five Star Personal Report	Available	Available
State-Specific Licensing Section	Available	Available
Consumer vs. National Marketing Sources	Available	Available
Relative Hours and Pay Rate Comparisons	Available	Available
Findings on Affordable Health Care Act Employer Mandate	Available	Available
In-State Comparisons of Sub-Sectors	Available	Available

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## The 2013 Study

» 2013 Edition NOW AVAILABLE!

» Order now by going to [privatedutybenchmarking.com](http://privatedutybenchmarking.com).

» Participants can still get it for \$229 and should have received an email with those details

» Non-participants – Look for an email regarding a special bundle package that includes our upcoming webinar on April 25th




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**Upcoming  
Mastery  
Webinars**

- ✓ **April 25<sup>th</sup> @ 2pm Eastern** – “The 2013 Benchmarking Study: The Results Are In” (\$49, \$29 for customers)
- ✓ **Taking Action Series** – See next slide

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**Special 4-Part Webinar Series:  
Taking Action on the 2013 Study**

*Dive deep down into the results of the 2013 Study with me to discover key strategies for growing and building your home care business!*

**Register & Get the 2013 Study for \$399  
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- » May 16<sup>th</sup> – Part 1: Finance
- » May 23<sup>rd</sup> – Part 2: Sales & Marketing
- » May 30<sup>th</sup> – Part 3: Operations & Quality Management
- » June 6<sup>th</sup> – Part 4: Recruitment & Retention

**\*Webinar Participants Must Own the 2013 Study.**

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**HOME CARE PULSE®**

**Questions?**

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