CREATING YOUR HOME CARE AGENCY'S SALES PLAYBOOK

APPROVED SENIOR NETWORK® MARKETING
Online and In-Person Home Care Marketing

Creating Your Home Care Agency's Sales Playbook

Finally... A Genuine, Direct, and Highly Effective Strategy for Securing Home Care Services Contracts Without Lowering Prices, Gimmicky Tactics, or Excessive Persuasion.

If you're the owner of a home care agency:

- ✓ How would you feel if your sales team consistently outperformed, achieving two to three times the industry's average productivity?
- ✓ What if your new sales representatives began securing contracts and turning a profit in just a few weeks instead of months?
- ✓ And what if you never had to worry about them underperforming or lacking motivation?

"Sales representatives don't lose their spark from selling; they lose it from endless outreach that doesn't result in a sale,and the absence of promising prospects."

To truly invigorate your sales team, ensure they have a continuous stream of top tier leads. This way, they won't become exhausted or disheartened from the relentless cycle of cold outreach.

Achieving this is entirely possible.

However, it demands more than just a minor tweak in your sales strategy.

It calls for a transformative and strategic shift in MARKETING, combined with a more structured and advanced method of interacting with (and securing) potential clients.

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The Core Issues with Most Sales Training Programs

There are TWO primary shortcomings in the majority of sales training courses available today.

The FIRST is their failure to address the most glaring obstacle that hinders many home care agencies from effectively securing more clients – the challenge of clearly conveying WHY a potential client should choose their services over countless other competitors. ***(WHY ARE YOU BETTER THAN THE 1000 OTHER AGENCIES IN YOUR AREA?)***

While many sales trainers emphasize discussing the BENEFITS over FEATURES, which is indeed valuable advice, it's not the sole barrier to overcome.

Prospective clients are not short on choices for home care services.

Whenever they need to find a home care agency, a quick Google search provides them with an extensive list of agencies eager to offer their services.

Contrary to common perceptions, not all potential clients prioritize "cost" when selecting a home care agency. However, when most agencies seem to offer similar services, with comparable quality and at the same price range, using generic statements like "We genuinely care" OR "We're the top choice," clients tend to opt for a more affordable choice, as it becomes the only discernible difference. ***(YOU ARE NOW COMPETING ON PRICE. This is not where you want to be.)***

So, if YOU are grappling with challenges related to pricing or finding it tough to engage with more potential clients about providing their home care, consider these three insights:

Insight 1: Before making a decision, no one knows the quality of care you provide; they only perceive the effectiveness of your MARKETING. And no one will switch from a "satisfactory" home care agency to another that might be better. ***This underscores the importance of having a USP (Unique Selling Proposition).***

The more agencies that can offer the same services as you, the LESS value your services hold.

Reflect on this:

- ✓ "How many other home care agencies can provide the care I offer?"
- ✓ "How many other home care agencies CLAIM they can offer what I provide?"

If you can't offer care that stands out significantly from your competitors, how can you anticipate a surge of potential clients wanting to engage with you?

In the absence of a compelling and logical reason to choose otherwise, potential **clients will ALWAYS decide based on cost.**

Yet, instead of addressing these foundational issues, many sales trainers focus on teaching superficial rapport-building techniques, such as sending a thank-you note post-meeting or observing personal items in a client's home to initiate a conversation.

While these strategies might have some merit, they're merely cosmetic fixes if you can't convincingly and compellingly explain why someone should choose YOUR agency over all other options.

Insight 2: The **second significant** issue with many sales training programs is that they try to mold you into a better SALESPERSON. What's the problem with that? A lot. The LAST thing you want is to be perceived as just another salesperson.

Consider the general perception of salespeople:

Skilled Nursing Facilities, Assisted Living Communities and Independent Living Communities often display "No Soliciting" signs.

Receptionists are trained to screen out sales calls and prevent salespeople from entering.

When you enter a store, and a salesperson asks, "Can I assist you?" The typical reply is, "No thanks, just browsing," even if you intended to make a purchase.

Surveys have shown that salespeople rank lower in trustworthiness than even politicians and lawyers! The inherent skepticism towards salespeople means you're already at a disadvantage if you're seen as one.

Instead, we advise our clients to utilize marketing to establish themselves as trusted consultants and recognized experts in their field.

****TRUST AND AUTHORITY****

If you fail in this, you'll face skepticism and dismissal because you're "just another salesperson." Even well-meaning prospects might feel justified in misleading you, avoiding you, or dismissing your suggestions.

To counteract this, many sales trainers emphasize the importance of referrals – which is sound advice. However, relying solely on referrals isn't always feasible. Moreover, you're still seen as a salesperson, and while you might receive a warmer reception, you lack the clout to genuinely influence the prospect.

To truly sidestep the "salesperson" label, you need a marketing strategy that **magnetically** draws prospects who are already inclined to engage with you. This strategy should position you as an expert in addressing specific needs they have, rather than just another home care provider or salesperson.

Successfully generating such targeted INBOUND leads is the initial step. Following this, you still require a sales approach that transforms them into loyal, enthusiastic clients or referral sources – leading us to another vital aspect...

One of the Most Beneficial and Profitable Tools You Can Cultivate in Your Home Care Agency

When you possess an effective sales strategy:

- ✓ You can trust your sales approach to consistently secure clients, eliminating the unpredictability of alternating between booming periods and stagnant phases.
- ✓ Your sales team's performance is enhanced, meaning you don't need as many representatives to achieve the same outcomes.
- ✓ New sales representatives can start delivering results in just a few weeks, rather than taking half a year or longer.
- ✓ You can confidently predict your client acquisitions for the current and upcoming months, providing stability in financial planning, ensuring timely payroll, and facilitating investments for expansion.

However, when you observe many home care agencies, it's evident that they lack a structured approach or system for client acquisition.

They often improvise, and when questioned, struggle to define the strategy they use to secure clients. Even if they do have a semblance of a strategy, it's rarely implemented consistently.

What's even more concerning is the complacency that sets in due to their reliance on referrals, which are essentially the easiest clients to acquire.

With such leads, they can afford to be unprepared and still secure some clients. Imagine applying this haphazard approach to actual caregiving! It would be utter chaos.

This underscores the importance of every home care agency having a **Home Care Agency Sales Playbook.**

This playbook comprises a set of strategies aimed at consistently securing clients with less effort, overcoming competition, and achieving better profit margins.

Many competitors either don't recognize the importance of this or simply don't invest the effort required.

Such a playbook also paves the way for expanding the client acquisition team both in numbers and skill.

The following is a broad overview of what your **Home Care Agency Sales Playbook** should include. It should be a dynamic combination of information, systems, and procedures that your team adheres to.

There's an optimal approach to almost everything.

So, why should your team waste time repeating the same mistakes, missing out on potential clients, and not maximizing their efficiency? This is precisely why a **Home Care Agency Sales Playbook** is indispensable for your agency.

What Your Home Care Agency Sales Playbook Must Contain:

Agency Information:

- ✓ The vision and mission of your agency.
- ✓ The story of your agency (how and why it was founded).

Contents:

- ✓ An organizational chart illustrating the hierarchy and delineating roles and responsibilities.

- ✓ The core values of your agency; specifically, the attributes that ensure success and the behaviors that could lead to termination.

- ✓ Short-term and long-term goals for the agency, spanning quarterly, annually, and up to a decade.

- ✓ A comprehensive overview of the care services your agency offers, highlighting the unique advantages of each service, the ideal recipients, pricing structures, expected profit margins, and more.

- ✓ A clear definition of the target demographics your agency caters to, including a thorough profile of your ideal client, both demographically and psychologically.

- ✓ Your agency's Unique Selling Proposition (USP), detailing the reasons clients should choose your services over competitors. *This should also include a list of notable competitors, strategies to replace them, and insights into their strengths and weaknesses.*

Performance Metrics for Each Role:

- ✓ A document outlining the primary objectives of the role.
- ✓ The top three specific and quantifiable outcomes expected from the role (these outcomes should be unambiguous).
- ✓ An list of the tasks and duties associated with the role.
- ✓ Details about the compensation structure, including the progression path for increased earnings:
- ✓ Explicit performance goals to be achieved within set timelines.
- ✓ The baseline performance metrics (client acquisitions/profit) required to retain the position.

Team Onboarding and Training:

It's advisable to have a checklist of essential skills and knowledge areas BEYOND client acquisition. This ensures comprehensive training and confirms that they are proficient in these areas.

Examples:

- ✓ Proper phone etiquette and effective use of the telecommunication system.
- ✓ Guidelines for using agency data, IT infrastructure, email, etc. (Acceptable Use Policy training).

- ✓ Procedures for processing agreements, both for new and returning clients (ensuring no unauthorized modifications to contracts; scanning and saving contracts with a specific naming convention in the client's folder; sending contracts to clients in a PDF format for their signature, and so on).
- ✓ Procedures for collecting payments, understanding payment deadlines, and accepting payments through various methods such as checks, credit cards, and bank transfers.
- ✓ Guidelines for addressing concerns or grievances from clients or potential clients.
- ✓ Steps to create and present a service quote ensuring it's profitable.
- ✓ Instructions for adding a potential client's details into your Client Relationship Management (CRM) system, including mandatory information, data entry standards, etc.
- ✓ Comprehensive training on using the CRM, including generating reports, scheduling follow-ups, updating essential fields, etc.
- ✓ Reporting protocols for activities, secured clients, potential leads, etc.
- ✓ Duties and responsibilities post-client acquisition.

Marketing Materials:

- ✓ Service branding, including the name, logo, and description. Dedicated webpage.
- ✓ Informative brochures.
- ✓ Frequently Asked Questions (FAQ) sheet.
- ✓ Detailed breakdown of various care packages, their levels, and pricing structures.
- ✓ Presentation folder equipped with a business card holder for initial client meetings.
- ✓ Comprehensive information package.
- ✓ A templated cover letter that confirms scheduled meetings, introduces the information package, outlines its contents, provides pre-meeting instructions, and sets expectations for the consultation.
- ✓ A compilation of testimonials, ideally matching the profile of the potential client.
- ✓ Self-authored book or complimentary informative reports.

- ✓ Comparison chart showcasing the advantages of your services over competitors.
- ✓ Audio introduction or promotional material.
- ✓ Other credibility-building info (news articles, newsletters, etc.).
- ✓ Business card.
- ✓ Logo materials, such as pens, stress hammer, chocolate (winter only or, if hand-delivered, in summer), notepads or other appropriate logo items.

Comprehensive Client Acquisition Strategy:

Internal Sales (Appointment Facilitators):

Routine Tasks and Their Execution:

- ✓ Number of calls to make daily/weekly.
- ✓ Number of client interactions daily/weekly.
- ✓ Appointments scheduled daily/weekly.
- ✓ Actual appointments held daily/weekly (target).

Guidelines for Communication:

- ✓ Specific scripts for direct conversations and voicemails for every outreach type (for instance, reaching out to referrals would differ from cold calls).
- ✓ Defined follow-up frequency based on the client type or outreach method (e.g., more persistent follow-ups for referrals compared to unsolicited contacts).
- ✓ Materials to share before an appointment.
- ✓ Procedures for confirming appointments.
- ✓ Protocols for handling requests like "Remove me from your list" or "Call me back in a month."
- ✓ Steps to update client details in the CRM.

External Client Representatives (CLOSERS):

Structured Process for Each Client Acquisition Phase:

- ✓ Preliminary Assessment
- ✓ Needs Identification
- ✓ Problem Analysis
- ✓ Solution Proposal
- ✓ Finalization

Professional Standards and Behavior Guidelines:

- ✓ Dress code for client meetings.
- ✓ Phone etiquette.
- ✓ Promptness in responding to potential and existing clients (same-day responses).
- ✓ Clear boundaries for client interactions

Client Profiling and Service Explanation:

- ✓ A detailed description of the ideal client/referral source, clarifying who they should target and the reasons behind it.
- ✓ A well-defined service package that can be easily communicated and explained to potential clients.

Routine Tasks and Their Execution:

- ✓ Specific strategies for client outreach.
- ✓ A time-management blueprint to structure their day for optimal efficiency.
- ✓ Targets for calls, meetings, agreements, client acquisitions daily, weekly, monthly, quarterly, and annually.
- ✓ Guidelines for responding to service inquiries.
- ✓ A compilation of frequent concerns and a systematic approach to address or preempt them.

- ✓ A list of commonly asked questions with comprehensive answers (this should also be part of promotional materials).
- ✓ Procedures for seeking, following up on, and rewarding client referrals.
- ✓ A detailed process outlining the representative's role in integrating the client into the agency's system.

Client Relationship Coordinators: (GARDENERS)

Routine Tasks and Their Execution:

- ✓ Number of clients to contact weekly.
- ✓ Regular interactions, meetings, or other engagement methods to maintain and enhance client relationships.

Strategic Client Engagement:

- ✓ A detailed plan for managing premium or high-priority clients, if relevant to their role.

Guidelines for Communication:

- ✓ Scripts for addressing concerns or feedback from unsatisfied clients.
- ✓ Detailed scripts and procedures for promoting each care service provided by the agency, including key selling points, potential concerns, unique benefits, etc.
- ✓ Strategies to identify and capitalize on opportunities within each client's care plan.

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