

October 2020

**HOME CARE PROVIDERS:**

# How to build your business with more referrals



# SPEAKERS



## **Donna Appel** **Veterans Home Care Marketing VP**

- Member of the Veterans Council of Broward County
- Advisor of the Aging and Disability Resource Center of Broward County's Senior Advisory Council
- Decades of experience in sales management, marketing and sales training

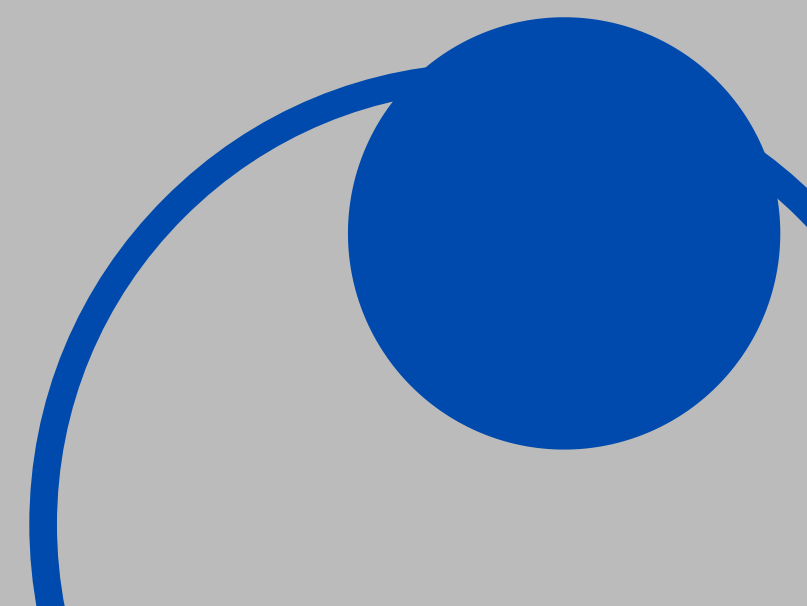


## **Evan Kaltman-** **Veterans Home Care Partner & Exec. Sales VP**

- Certified CEU Speaker National Association of Social Workers – New Jersey Chapter (NASW-NJ)
- Member of the New Jersey Association of Veterans Service Officers (NJAVSO).
- Board member for Welcome Home Vets of NJ.

# TODAY'S TOPICS

- 1 **Latest Research** from Home Care Pulse
- 2 How to get **more appointments** with referral sources
- 3 Using **VetAssist** to increase census
- 4 **Next webinar topic: digital marketing**





# OUR GUEST SPEAKER



## **Kire Madsen**

### **Home Care Pulse - Vice President of Customer Success**

After leading a regional sales division for a global consumer products company, Kire joined Home Care Pulse to head their Customer Success department. He brings over two decades of experience in sales and customer success.

Kire and his team have worked with more than 4,000 home care agencies to help them solve business problems and keep growing.

Kire has consulted with the executive teams of many of the leading brands in home care to help them implement data and improve operations.

When he's not working, you'll find him with his family.

# Part 1) Latest Research

What you should know to get more referrals

# ABOUT HOME CARE PULSE



For years, Home Care Pulse has been the industry leader in collecting and analyzing data to help agencies understand how to improve their businesses.

Our vision is to build on that foundation by offering not just the insight on what needs to be done, but also the tools to help them do it.

# HOME CARE PULSE STUDY



## Only 3 Ways to Increase Revenue

1. Get more clients
2. Make more money per client
3. Retain clients longer

**Client retention and client lifetime value are key profit drivers.**

# HOME CARE PULSE STUDY



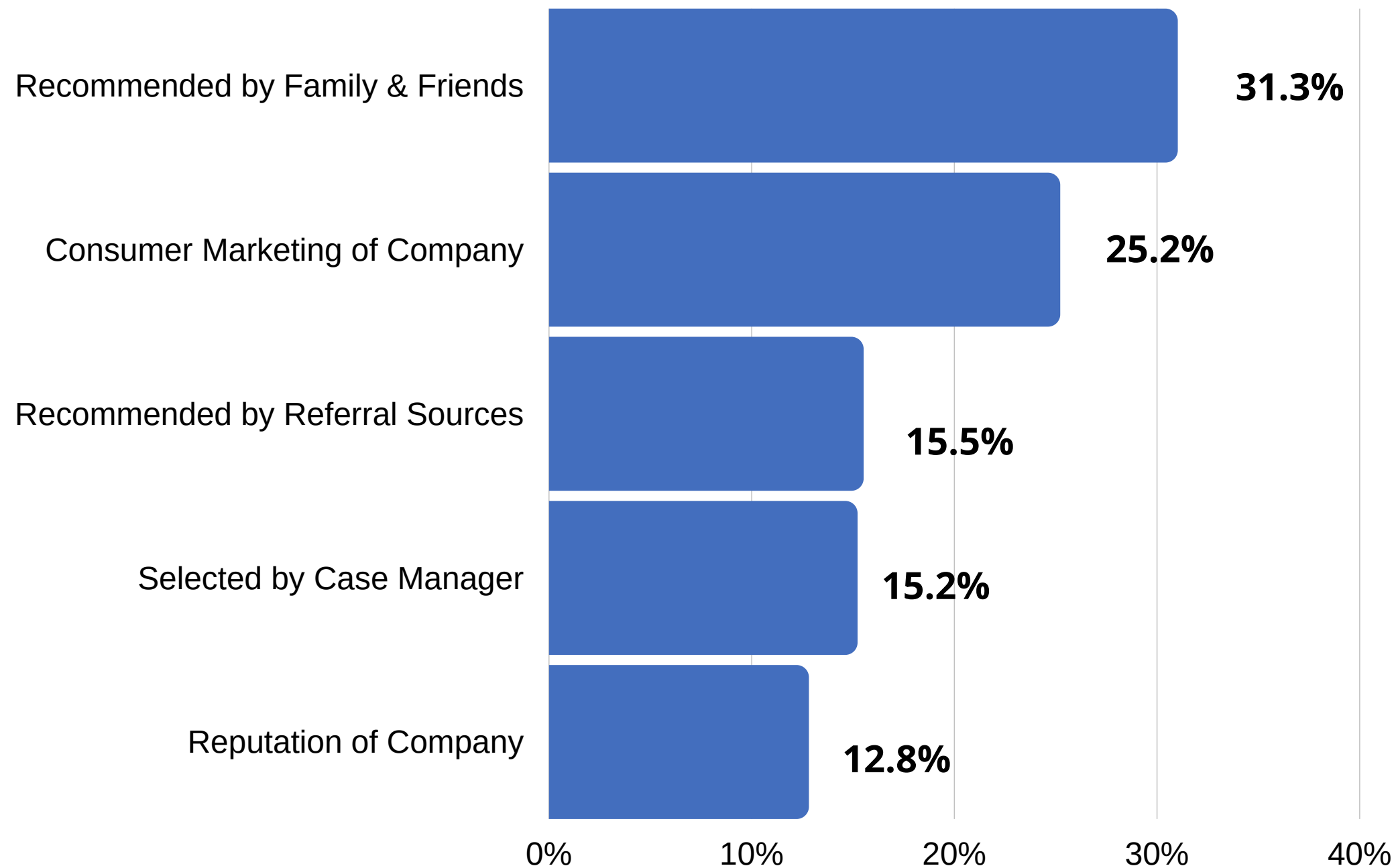
Rank	Top Growth Opportunities
1	Strengthen relationships with referral sources
2	Caregiver recruitment and retention program
3	Increasing client referrals by improving client satisfaction
4	Company expansion into new market(s)
5	Contracts with continuing care retirement communities (CCRCs), independent and assisted living communities



# HOME CARE PULSE STUDY



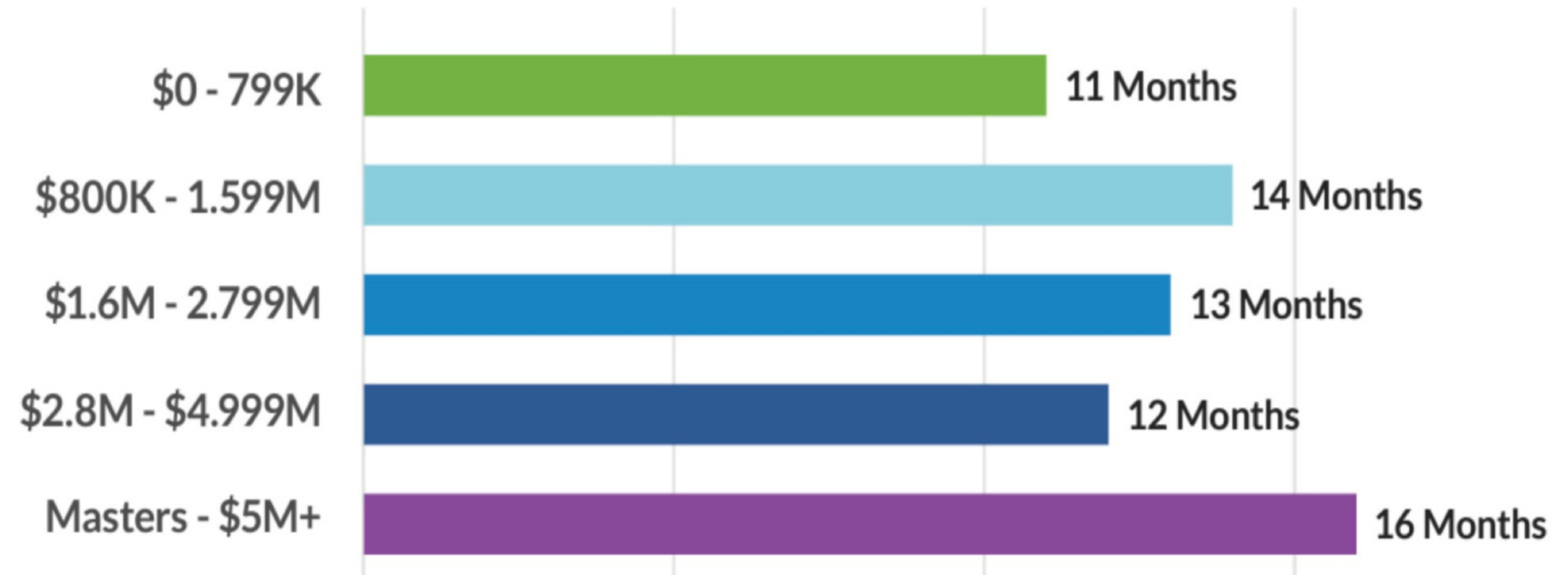
## Top 5 Reasons Why Consumers Choose a Home Care Provider



- From 2016 Survey released in 2017 Home Care Pulse Benchmarking Study

# HOME CARE PULSE STUDY

## Client Average Length of Service for 2019 - Revenue Ranges



- Clients are a mix of both private pay (36%) and other funding sources including Medicaid
- From 2019 Survey released in 2020 Home Care Pulse Benchmarking Study

# HOME CARE PULSE STUDY

## Top 10 Referral Marketing Sources

Source/Method	Percent of Participants Top Source	Median Percent of 2019 Revenue
<b>Clients</b> - Past and current clients and their loved ones	22.0%	73%
<b>Healthcare Professionals</b> - Home Health Agencies (Medicare Certified)	7.9%	22%
<b>Healthcare Professionals</b> - Hospital discharge planners	6.8%	28%
<b>Healthcare Professionals</b> - Assisted Living Facilities	6.2%	23%
<b>Healthcare Professionals</b> - Hospices	5.4%	26%
<b>Government</b> - State Medicaid Waiver Programs	5.4%	37%
<b>Healthcare Professionals</b> - Skilled nursing facilities	4.0%	29%
<b>Government</b> - Area Agency on Aging Case Managers	4.0%	40%
<b>Government</b> - Veterans Administration Programs	3.9%	29%
<b>Healthcare Professionals</b> - Physician offices	3.7%	22%

The following was asked of survey participants: "Please input your top two revenue-generating referral sources in 2019. Then select the percentage of 2019 annual revenue each top method was responsible for."

As such, Median Percent of 2019 Revenue shown here represents the percentage of revenue that came from a given source for the agencies who listed it as one of their top sources.



# HOME CARE PULSE STUDY

## Top 5 Consumer Marketing Sources - from Master providers who billed \$5M+ in annual revenue 2019

Source	Percent of Participants Top Source	Median Percent of 2019 Revenue
Internet - Search Engine Optimization (consumers can find you online)	31.6%	13%
Internet - Google Ad Words/Pay Per Click	20.3%	9%
Internet - Facebook	5.1%	5%
Internet Lead Sites - Caring.com	5.1%	5%
Internet - Corporate Web Leads (i.e. Franchisors Website, etc.)	3.8%	20%



# HOME CARE PULSE STUDY

## Top 10 Consumer Marketing Sources

Source	Percent of Participants Top Source	Median Percent of 2019 Revenue
<b>Internet</b> - Search Engine Optimization (consumers can find you online)	17.6%	20%
<b>Internet</b> - Google Ad Words/Pay Per Click	13.8%	18%
<b>Internet</b> - Corporate Web Leads (i.e. Franchisors Website, etc.)	9.0%	21%
<b>Internet</b> - Facebook	8.4%	28%
<b>Internet</b> - Google+	4.9%	15%
<b>Ads</b> - Senior Directories	4.4%	17%
<b>Consumer Events</b> - Public Speaking at churches, senior centers, etc.	3.9%	20%
<b>Ads</b> - Newspaper	3.7%	24%
<b>Ads</b> - Television	3.5%	19%
<b>Internet Lead Sites</b> - Caring.com	3.0%	21%

Survey participants were asked, "Please select your top two revenue-generating consumer marketing sources in 2019. Then select the percentage of 2019 annual revenue each top method was responsible for."

As such, Median Percent of 2019 Revenue shown here represents the percentage of revenue that came from a given source for the agencies who listed it as one of their top sources.





# Part 2) Building Your Referral Network & Getting More Appointments

# CREATE A "REFERRAL NETWORK"



- What is a referral network?
  - Strategic partnerships: a group of related professionals who target similar audiences
  - Also known as "power partners" or "business networks"
  - They refer to you and you to them.
  - Marketing happens when you're not there
- Meet regularly
  - Set a standing meeting on your calendar
- Use technology to organize & conduct virtual meetings
  - Don't wait for Covid to be over. Start now!
  - TEAMS, Zoom, Go-to-Meeting, Google Meet, etc.
  - MeetUp.com, Eventbrite.com
- Create meeting agendas
  - Guest speakers, elevator speeches
  - Swap brochures and business cards
- Recruit leaders and top performers
  - Use LinkedIn or ask your clients for recommendations



# INVITE THESE PROS TO YOUR NETWORK





# How to get appointments with health care professionals

## **Pro Tip:**

- **When a family contacts you about a client in a rehab facility/inpatient setting, you have an opportunity to visit the client or gain access with staff at that facility.**
- **Make an appointment with the social worker/discharge planner/activities director to provide a safe discharge.**

## **Pro Tip:**

- **When a network partner has a relationship with a facility, ask to go along so you can gain access.**

# How to get appointments with health care professionals

## STEP 1: GET SET

- **Check your schedule.**  
Be prepared to jot down names, notes, and schedule an appointment

## STEP 2: CALL

- **Rehab Facility**  
Typically a skilled nursing facility (SNF) that offers sub-acute rehabilitation (SAR) in an inpatient setting
- **Home health care company**  
that offers physical therapy (PT), occupational therapy (OT) and/or speech therapy
- **Nonprofit organization**  
Catholic Charities, Jewish Family Services, etc.
- **County senior services**  
Area Agency on Aging, etc.





# How to get appointments with health care professionals



## STEP 3: ASK

- Ask to speak to their director of social services

## STEP 4: THEN SAY

- “Hello, this is (your name) from (your agency name) here in “city your agency is located.” I am calling to let you know that we (your agency name) are a VetAssist Program provider.

The **VetAssist Program** is a unique tool that helps wartime veterans and widows of wartime veterans obtain our home care services at no out-of-pocket cost if they qualify.”

“I would like to meet with you for about 15 minutes to let you know how it works and how you can use it help the veterans and widows of veterans at your facility/area.”

“Which day next week will work best for you?”

“I only need 15 minutes, what time is best for you?”

Book the appointment while you have the social worker on the phone.

# How to get appointments with health care professionals

## STEP 5: INVITE US!

- Invite your VetAssist regional manager to come with you to the appointment or join the conference call.

If he/she is not available, have him/her send you the “Social Worker Presentation” and review with you prior to your appointment.



## **Part 3) Using the VetAssist Program to increase your census.**



# ADVANTAGES OF A VETASSIST PROVIDER

Instead of referrals, you get clients!

- starts of care notices
- home care clients with reliable, steady funding



## VETERANS

Up to \$1,911 per mo



## MARRIED VETERANS

Up to \$2,266 per mo



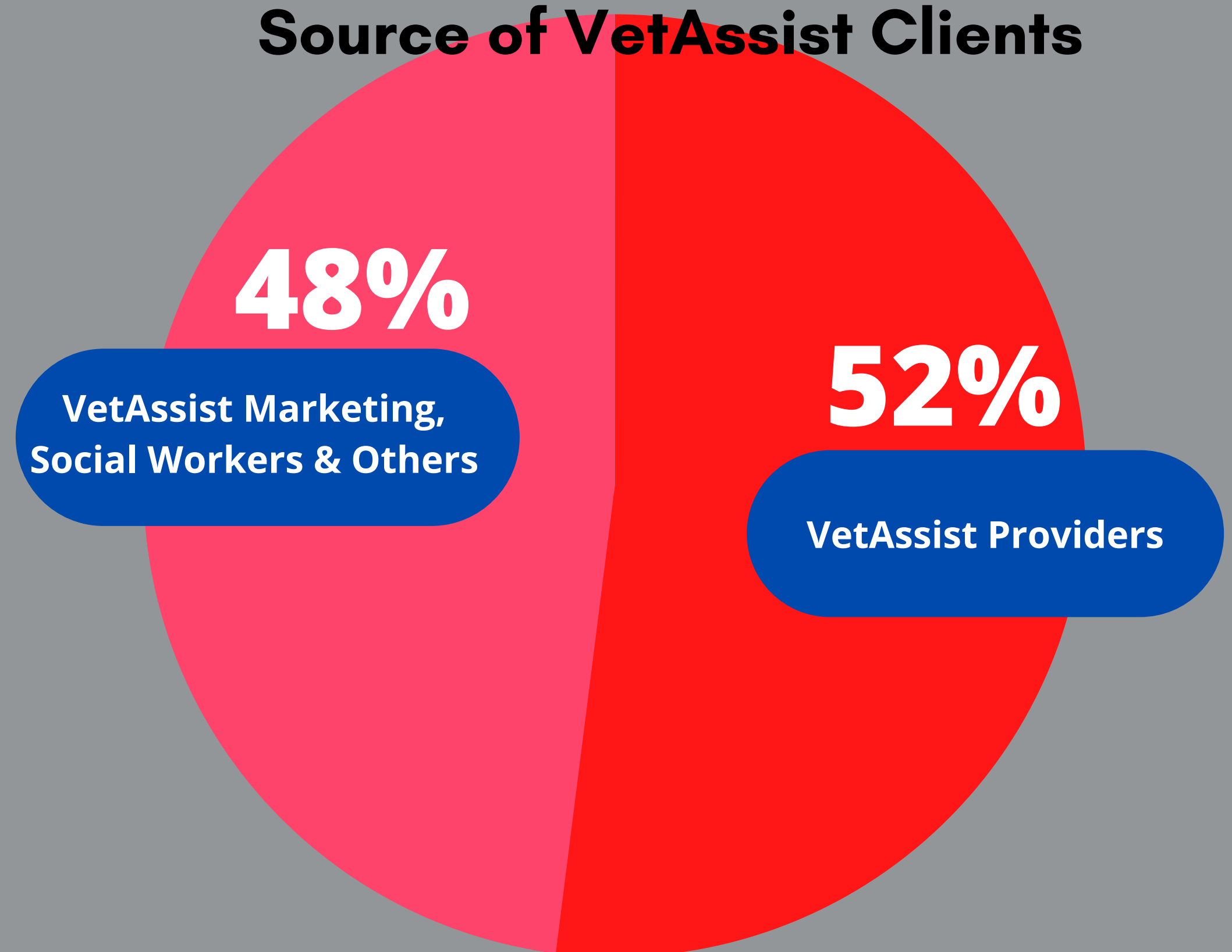
## SURVIVING SPOUSES

Up to \$1,228 per mo

# WE HAVE CLIENTS WHO NEED PROVIDERS

- Our website & digital marketing is increasing leads directly from consumers
- About 1/2 of VetAssist clients need a provider

**Source of VetAssist Clients**





# VETASSIST DIFFERENTIATES YOUR COMPANY STAND OUT AMONG THE COMPETITION

Home Care  
Agency

**VetAssist**<sup>®</sup>  
Home Care  
Agency

Home Care  
Agency

Home Care  
Agency

Home Care  
Agency

Home Care  
Agency

Home Care  
Agency

Home Care  
Agency

# VETASSIST CLIENTS STAY LONGER

reducing your client turnover costs!

Increasing customer retention rates by 5% increases profits by 25% to 95%.

\*Harvard Business School Research

\*Harvard Business School: 7.2020  
<https://hbswk.hbs.edu/archive/the-economics-of-e-loyalty>

- The length of stay of a VetAssist client is longer than the industry average.
- Perhaps this is because our client service team stays in touch and VetAssist clients have a reliable funding source to pay for their home care.
- The VA Aid and Attendance benefit is a lifetime benefit, as long as the beneficiary remains in compliance with VA regulations.

	Average Length of Stay
VetAssist Clients	35 months
Home Care Industry Avg. Client	11-16 months

# WE CAN HELP TRAIN YOUR TEAM



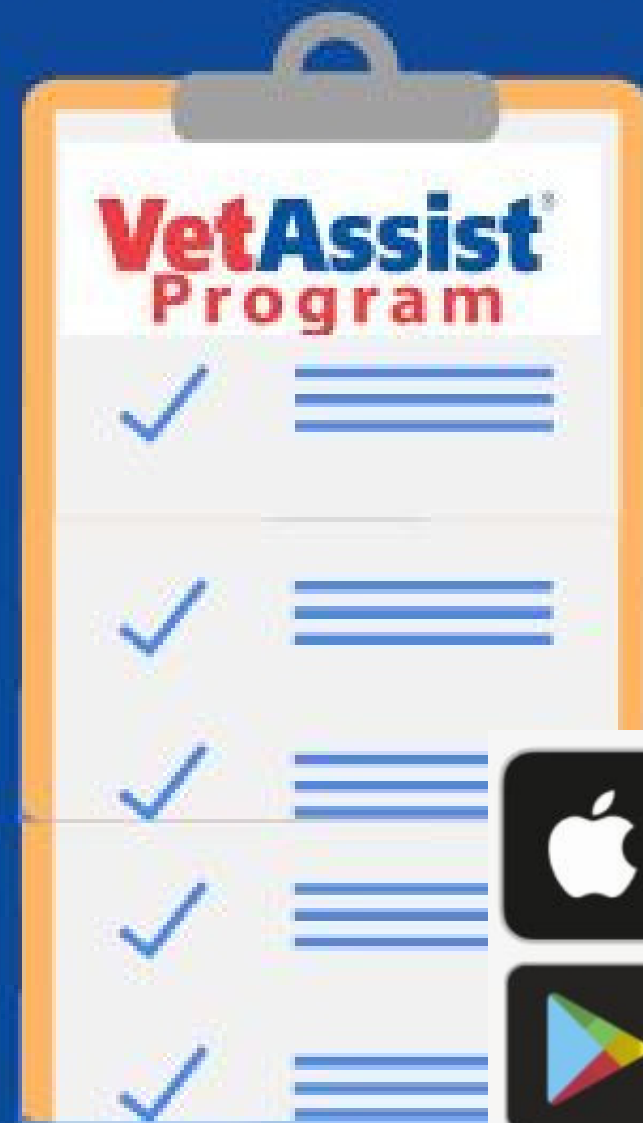
Schedule an in-service with your team and a VetAssist regional manager

Be sure your intake staff...

- **KNOWS ABOUT VA BENEFITS & THE VETASSIST PROGRAM**
  - The VetAssist® Program helps veterans, or their surviving spouses, apply for a little-known Department of Veterans Affairs benefit.
  - This benefit pays for assistance with activities of daily living.
  - VetAssist clients can get home care started right away before the processes the claim and VA funds arrive.
- **KNOWS WIDOWS OF VETERANS MAY QUALIFY**
  - A surviving spouse of an eligible veteran can receive up to **\$1,228** per month.
  - The spouse must have been married to the veteran at the time of his death.
- **ASK CLIENTS, "ARE YOU A VETERAN?"**
  - Combat duty and overseas service is not required.

We provide easy to use

# ONLINE ELIGIBILITY CHECKLIST



VA Aid & Attendance rules are complicated. We make it simple.

<https://veteranshomecare.com/check-your-eligibility-for-the-vetassist-program/>

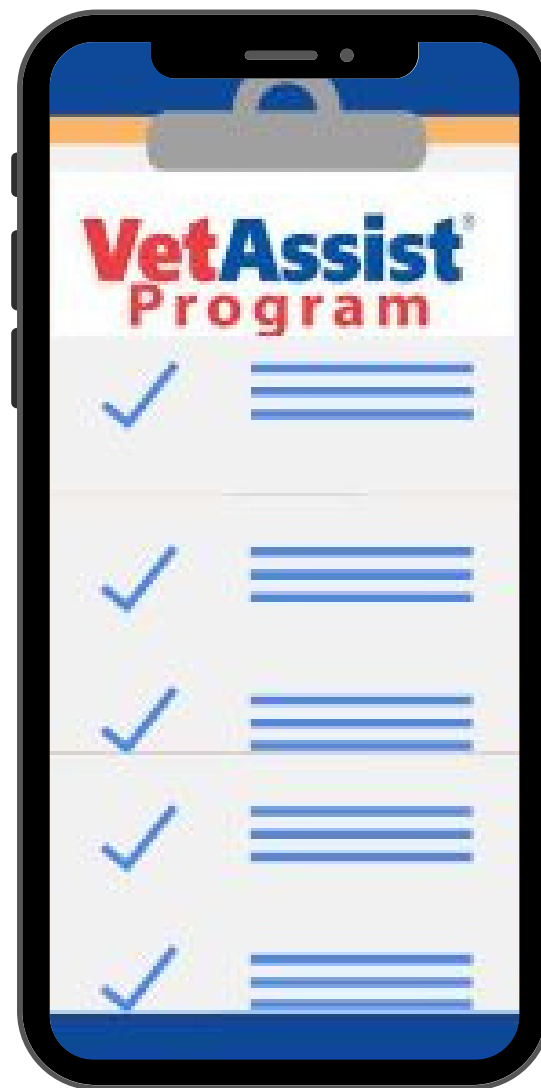
- Quick way to screen for eligibility
- Perfect training tool for your intake staff
- Available on our mobile app or our website
- If client answers "YES," to all questions, they should apply for VetAssist and the VA's Aid and Attendance benefit.



# You don't have to be an expert-- just use this tool!

# SCREEN YOUR CLIENTS FOR ELIGIBILITY

When client answers "YES," to all questions, he or she should apply for VetAssist and the VA's Aid and Attendance benefit.



<https://veteranshomecare.com/check-your-eligibility-for-the-vetassist-program/>



## ELIGIBILITY CHECKLIST



# We simplify Aid & Attendance & VetAssist Eligibility

**Ask about 3 Ms:**



**1. Military**



**2. Medical**



**3. Monetary**

# ELIGIBILITY CHECKLIST



## 1. Military

### Military Screening Questions

- 1) Are you a veteran or the **surviving spouse** of a deceased **wartime veteran** who needs help to live safely at home?
  - **Surviving spouse** must have been married to the veteran at least 1 year and at time of veteran's death.
  - **Married couples** are only eligible if the veteran is disabled and meets the guidelines.
- 2) Did you receive an honorable discharge?
- 3) Did you serve at least 1 day during wartime?

**World War II:** December 7, 1941 – December 31, 1946

**Korean Conflict:** June 27, 1950 – January 31, 1955

**Vietnam Era:** August 5, 1964 – May 7, 1975 Or served in the country of Vietnam February 28, 1961 – August 5, 1964

**Persian Gulf War:** August 2, 1990 – until date to be determined

## ELIGIBILITY CHECKLIST



## 2. Medical

### Medical Screening Questions

1) Do you have a **medical condition** causing the **need for assistance with activities** of daily living?

- Do you need help with bathing, dressing, grooming, using the bathroom, moving about safely, meal preparation, light housekeeping, transportation and more?
- If under age 65, a letter from Social Security must verify the disability.

2) Do you want to spend your VA Aid and Attendance funds **primarily for in-home care?**

For VetAssist  
Program

# 3. Money

## ELIGIBILITY CHECKLIST



### Monetary Screening Questions

1) Do you have a net worth (income & assets) at or less than **\$129,094**?

- A primary residence and auto are not counted as part of net worth.
- Ongoing non-reimbursable medical and custodial care expenses may reduce your annual countable income.

# Part 4) Next webinar topic: Best Digital Marketing Practices--

What's working for us at Veterans Home Care

# DIGITAL MARKETING HOMEWORK

Learn more by watching these Netflix documentaries

## **The Social Dilemma –**

Former Silicon Valley execs from Facebook, Twitter, Google and more take you behind the curtain so you can understand how digital ads really work.





# DIGITAL MARKETING HOMEWORK

Learn more by watching these Netflix documentaries

## **The Great Hack –**

Who has seen a digital ad that has convinced you that your smart phone is listening to your conversations? You'll learn the power of digital advertising with case studies from around the globe.



# TALK TO US!

## EMAIL

info@veteranshomecare.com

## PHONE

877-390-6377

## OUR TEAM DIRECTORY

1[https://veteranshomecare.com/region  
alcontacts/](https://veteranshomecare.com/regionalcontacts/)

# REFER A CLIENT!

## ONLINE FORM

<https://veteranshomecare.com/refer-veteran-family-us/>

## EMAIL

referrals@veteranshomecare.com

## PHONE

888-314-6075

## FAX

888-639-4180

**VetAssist<sup>®</sup>**

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National Headquarters | 11861 Westline Industrial Dr. | Suite 750 | St. Louis, Missouri 63146

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