

Caring.com Workshop: How to Craft Effective Communications for Internet Referrals

Following up with prospects you receive from online referral sources isn't very different than following up for other referrals. We've compiled key scenarios within the consumer decision process where you have the chance to show credibility, establish rapport, and leave a great impression with each prospect. These scenarios were originally presented during a 2014 Caring.com educational webinar. The responses were written by our industry expert panelists who gave us permission to share their information as is.

New referral: How to confirm/keep a tour scheduled for a new prospect, "Susan Smith"

Expert approach #1 from Jeanine Aspen, DEI Sales (www.Dei-Central.com)

Background: An online referral company sends you a referral with a tour that's already been scheduled for the near future.

Objective: Keep the tour as scheduled (there is always a risk of any conversation derailing the appointment.)

[Introduce yourself]

Good morning, Susan.

This is _____ (Jeanine) from _____ (Maple Ridge Retirement Community), we are an Independent Living community here, _____ (in the Chicago area). I'm not sure if you recall, but your family advisor from Caring.com mentioned our community when she spoke with you recently?

Purpose:

And so the purpose of my call, Susan, is to confirm your visit for August 28th at 1:00 pm. I'm planning to give you a tour and sit down and answer any questions you might have.

Appointment:

- **Response:** Yes, that's correct.
- **Response:** something else (that can derail the scheduled visit if you aren't careful):
- I'm glad you called. I need to know how much you cost?

[Answer the question]

Our smallest units start at \$2500 and range upward from there depending on size of the apartment and the selection of various amenities and services.

Scenario 1: I'm just curious, have you ever visited a senior community such as ours?

"No, I haven't."

Then it will be good that you are coming in. It is so helpful to actually see what is offered and meet the people. It really helps you with your decision making process.

OR

Scenario 2: “Yes, I’ve been touring.”

Then it is really good that you are coming in. It is so helpful to actually see how different various communities are from one another. It will really help with your decision.

I’ll look forward to seeing you on the 28th, then?

Scenario 3: Another common response from prospects -- “You know, I don’t know if it makes sense to visit until my mother is here to come with me. I may be wasting your time.”

Typically when folks are looking at options such as you are it can be very helpful for them to actually visit the community. And of course you’ll bring your mother in. I always expect that families may need to visit multiple times. I’m fine with it. It’s how you can make sure you are making a good decision. And my job is to help you make a good decision, whether or not we are the right place for your mother.

Will the 28th at 1:00 pm be OK for you?

Scenario 4: Another common Response: You know, I don’t know if we are ready yet! Most of our residents, when they started looking, did so before they were ready to actually make a move. We just moved in a new resident last week who first visited our community over a year ago. But when she was ready she knew what she was going to do. I don’t expect you to make a quick decision if you aren’t ready. But I’m happy to help you research our options.

Is the 28th a bad day for you?

Expert approach #2 from Brennan Hughes, Caring.com:

[Leave a voicemail]

Hello Susan...my name is Brennan and I’m calling with Palm City Living. We have you scheduled on August 28th at 1pm to come and visit our beautiful community for your mom, Evelyn. I wanted to make sure you had good directions and the time still worked good for you. I’m looking forward to meeting you Saturday and learning more about your mom and her interests.

Please give me a call back at 500-661-1111 to let me know you received this and directions. In the meantime, I am going to send you an email with a link to our community as well. Have a great day! Goodbye.

[Have a phone conversation]

Hello Susan? This is Brennan with Palm City Living, how are you?

I am calling to confirm your visit with us on August 28th at 1 pm to gain information for your mom Evelyn. Do you have a few minutes so I can ask you some questions?

1. I understand your mom is living independently now. Can you tell me more about her current situation and what's changing?
2. Tell me more about your mom and what she likes to do? What did she like to do prior to her knee injury?
3. How does she feel about making this move?
4. In a perfect world, what is your timing for your mom to move?
5. Anything else you can tell me about your mom to help me learn more about her and her needs?

Please feel free to call me with any questions, but I am looking forward to speaking with you at 1pm august 28th. Do you have directions or do you need me to email them to you?

Thanks and have a great day!

New referral: How to confirm/schedule a home care consultation for a new prospect, "Sharon Burns"

Expert approach #1 from Vishal Shroff, Caring.com:

[Leave a voicemail]

Hi Sharon, this is Vishal Shroff calling from ABC Home Care. I see that you spoke with Margo Lee from Caring.com to arrange for care for your Brother-in-law. We have been helping families in the Winter Park area for the past 4 years and would love to come out and meet with you and your Brother-in-law to better understand his situation and see if Home Care is the right option. We can provide various levels of care right in your Brother-in-law's home. Please feel free to call me at (505)-550-5050 so I can answer any questions you might have. Again, my direct line is (505)-550-5050. I look forward to meeting you soon.

[Questions to ask if you get Sharon on the phone]

Hi Sharon, this is Vishal Shroff calling from ABC Home Care. I see that you spoke with Margo Lee at Caring.com to arrange for care for your Brother-in-law. I wanted to make sure you understood how home care agencies like ours can help you.

We can arrange for a professional caregiver to come and take care of your Brother-in law right in his home, making it a great way for him to be as independent as he wants to and you have the peace of mind knowing that a professional is there if he needs help. If it is ok, I would like to ask you a few questions to understand the situation better.

1. Let's start with your Brother-in-law's name? (Let's assume his name is Elvis)
2. How old is Elvis?
3. Margo from Caring.com mentioned that Elvis lives with family, who is he currently living with?
4. Why are you looking for care now? Has something changed in his living situation?
5. How is his mobility?
6. Does he bathe and groom himself?
7. What about grocery shopping?
8. Is he still pretty social? Goes out and meets with friends?
9. What kind of care were you looking for? What does Elvis need help with?

Ok, this gives me a good basic idea of his situation and I am sure we can help.

A Home Care agency such as ours can provide almost all the non-medical help a person might need including things like bathing, grooming, grocery shopping, cleaning, medication reminders, or just plain and simple companionship, depending on what Elvis needs. Let's schedule an initial consultation where we can come and meet Elvis to better determine his situation and needs. This is obviously a completely free consultation requiring no commitment on your behalf. Is this week good?

How to follow up: Expert approach #2 from Bonnie Daneker of Write Advisors
(www.writeadvisors.com)

[Discuss home care, verify information, plan time for a care consult.]

Voicemail scenario: Leave slow message with Name, Company, Caring.com reference. Tell them you understand the need and will try to help you with that. You will call back later, but if they want to call you here is the contact information.

Live conversation:

[Greet and explain connection, background]

- Company: Hello. May I speak with Ms. Sharon Burns?
- Ms. Burns: Speaking.
- Company: Hi Ms. Burns. This is _____ from Winter Park Home Care Company.
- How are you doing today?
- Ms. Burns: Fine, thanks. How did you get my name?
- Company: Glad to hear it. Well, we work with Caring.com, and we hear from Margo Lee, the Family Advisor there, that you've asked to talk with someone about your brother-in-law's care. Is that right?
- Ms. Burns: Yes, yes it is. Oh now I remember.

[Show credibility and establish rapport, speak in the speed they need you too. Too slow is off-putting, too fast is hard to follow.]

- Company: Good. Our company does this _____, right here in Winter Park, and we've been doing this for ____ years. And, like I mentioned, we also work with families through Caring.com to help them identify some good options for taking care of loved ones. We're calling to see if we can help. It says here your brother-in-law is living with you right now, is that right?
- Ms. Burns: Yes, and I'm afraid I won't be able to care for him much longer.
- Company: Okay, so his needs are changing?
- Ms. Burns: Yes, and I'm just not that skilled as a nurse. I need help. Maybe I need to move him.

[Commiserate, be compassionate, and verify information.]

- Company: I understand. Tell me a little more about him. We can figure out some possible solutions once I know some details here.
 - What's his name?
 - About how old is he?
 - How long has he been living with you? How does he like it?
 - Tell me a little bit more about his medical needs. What has he been to the doctor recently? For what? How about other things on his medical history?

- What kind of medication does he need?
 - How's his mental clarity? Memory?
 - Does he move around OK? Does he have a walker or cane?
 - How about eating, can he feed himself?
 - Does he need assistance with dressing, washing, or toileting?
 - How much time during the day or night do you think that he would need assistance? Would that be every day? How soon would he need it?
- Ms. Burns: [Answers all the questions]

[Repeat]

- Company: Let me repeat all this quickly back to you to make sure I got this right.
- Ms. Burns: That's right. I got some questions too.

[Answer questions. Explain a few of the differences and give a little more information. Ask for next meeting. Offer to provide references.]

Company: Here's the difference _____. Here are the benefits, here are things that you have to think about _____. Here are the costs _____. We would recommend _____ for you because of this _____. I know it can be unsettling to have someone new in your home. I'd like to give you some references, maybe have you meet some of our care professionals. You can meet and interview them wherever it's comfortable for you. Can we set something up?

[Ask if they have other questions.]

What other questions can I answer for you?

[Thank them.]

Thank you for your time.

New referral: CONTACT THIS PROSPECT NOW! (for senior housing)

Expert approach #1 from Megan Fletcher, Caring.com

Good afternoon Jane,

My name is Megan Fletcher and I am the Community Relations Director at Willow Glen Heights. Our community is centrally located in San Jose. We offer both Independent Living and Assisted Living. We are a smaller community that is all on 1 floor making it a very safe environment. We offer a great and active senior living environment. I would love to have you come in and tour our community, have lunch, or whatever is most convenient for you. I have also included an online brochure for your review.

I truly look forward to the opportunity to meet you and your mother Claire. Please let me know if there is anything I can do to assist you in your search.

Please feel free to contact me via this email address or by phone at 123-456-7891.

Wishing you and Claire our best.

Sincerely,

Megan Fletcher

Community Relations Director

Expert approach #2 from Jeanine Aspen, DEI Sales (www.Dei-Central.com)

Objective: Engage the prospect via email and move the relationship to the next level with a phone with a phone conversation and ultimately to schedule a face-to-face (tour).

Contact via email

These emails have a specific purpose, and so their subject lines should be specific as well.

Subject: The information you requested about Independent Living Communities

Alternative Subject: Lucy King

Email:

Dear Jane,

I am the Executive Director here at _____ Retirement Community. At the request of Lucy King, the family advisor from Caring.com I am sending some information for your research. I have attached our Reliable Resources for the Family Caregiver booklet as well as our rate schedule. Below is also a link to our digital brochure that provides additional information about our community and services.

As the executive director of our community, Jane, I frequently help families who are working through what can be a confusing time as they sort through all the information from the various providers they are researching. My job specifically is to help anyone I'm working with to make the right decision for their situation.

My limited understanding of your mother's situation is that she is essentially independent but uses a cane and needs some help with cleaning and cooking. It appears she fits the profile of many of the residents who reside happily in our lovely community.

In order to give you a better assessment of the likelihood that _____ Retirement would be a good solution for your mother, I suggest that we set up a phone meeting at your convenience, when you feel you are ready. And eventually you'll want to come in and visit the community and meet the staff. It is the best way to really see what's offered.

In the meantime, let me know if I can help you with any other questions you may have.

Sincerely,

Executive Director

_____ Retirement

Phone:

Email:

Web site, ***digital brochure***

Picture (if available)

Expert approach #3 from Bonnie Daneker, Write Advisors (www.writeadvisors.com):

[Same suggestions on VOICEMAIL]

Purposes: Discuss home care, verify information, plan follow-up (visit?)

- Company: Hello. May I speak with Mr. Jim Crickett?
- Mr. Crickett: Speaking.

[Greet and explain connection, background]

- Company: Hi Mr. Crickett. This is _____ from _____ . As you know, we work with Caring.com, and we hear from Margo Lee, the Family Advisor there, that you've asked to talk with someone about your wife Rachel's care.
- How are you doing today?
- Mr. Crickett: Fine, thanks. I was expecting your call.

[Show credibility and establish rapport, speak in the speed they need you too. Too slow is off-putting, too fast is hard to follow.]

- Company: Glad to hear it. You're starting to look at Assisted Living Communities for her. Is that right?
- Mr. Crickett: Yes, yes it is.
- Company: Good. Our company does this _____, right here in Winter Park, and we've been doing this for _____ years. And, like I mentioned, we also work with families through Caring.com to help them identify some good options for taking care of loved ones. We're calling to see if we can help. It says here that your lovely wife fell recently and broke her hip, is that true?
- Mr. Crickett: Yes, yes it is.
- Company: You must be very concerned. She must have had a tough go of it lately. How's she doing now?

[Give Mr. Crickett time to talk, confirm information on the form.]

- From the sounds of it, you'd like to look at moving her in 3-6 months?

[Have a detailed plan ready to talk with him about. He's got specifics in mind, you should have too. Also, have a contact for him to talk with of a person with similar needs that he can contact if possible.]

- Mr. Crickett: Yes, and I don't know what my options are or what the move might entail. I just know I can't take care of her anymore.

[Give them several options and your recommendation, but help them feel empowered to make the right choice. Caregivers often feel powerless but when you arm them with information, they can make good choices.]

- Company: It sounds like we have a couple of options: _____ and _____. Based on how soon you're looking for help and what your budget is, your best option is likely this _____.

Our company does this and I can mail you or email you more information. Do you have our website? It is: _____. We can certainly provide you with references and reviews.

[Give him a chance to think it over.]

- I know this is a lot of information. Why don't I give you some time to read it, and we can talk more next week? I know you want to make good decisions quickly, but it's important to have good information first.

[Next steps – tour, home meeting, whatever their intake process is.]

- Thank you - good talking with you.
-

How to follow up: Expert approach #5 from Brennan Hughes, Caring.com:

Voicemail message:

Hello, Jim...This is Brennan from Palm City Assisted Living. I received your information Margo at Caring.com and that you are wanting some information. I would love to speak with you further. Please contact me at your earliest convenience at 772-233-8775. In the meantime, I am going to send you and email with some information about Palm City Assisted Living. Thanks and have a great day.

Conversation:

Hello Jim? This is Brennan from Palm City Assisted Living, how are you? I received your name and information from Margo at Caring.com. She said you are wanting some information on options for your wife, Rachel?

Do you mind if I ask you some questions?

- I understand Rachel recently returned home from rehab after a fall? Can you tell me more about how she is doing now vs. prior to the fall?
- What specifically is the aide helping her with currently?
- What other types of assistance do you think she will need?
- Tell me more about what Rachel enjoyed doing prior to her fall?
- How is she feeling about the possibility of making a move?
- How are you feeling about it?
- What time frame are you looking at to make this decision?
- Do you have anyone else in your family or support network to help you make this decision?
- I would love the opportunity to meet you in person as well as Rachel to answer any questions you may have as well as show you our community and discuss how we can help you both in this situation.
- Are you free to come in to visit with us, either today or tomorrow?

[Proceed to narrow down time, offering directions, etc.]

New Referral: Home Care for Melinda Blake

Expert approach #1 from Bonnie Daneker, Write Advisors (www.writeadvisors.com):

Purposes: Contact via email. Introduce you, your company, set a next meeting or conversation

Subject: Follow-up from Caring.com [They may not know your name or your company, and likely caring.com has allowed access if they are working with email a lot, so it won't go into a spam folder].

Hello Melinda,

[Greet and explain connection, background]

I'm ____ from _____ Company. Our company does this _____, and we've been helping families care for loved ones in their homes for ____ years. We also work with families through Caring.com to help them identify some good options for their caring needs. We're emailing to follow up on your request to Margo Lee, the Family Advisor there. She mentioned that you've asked to receive more information about taking care of your mother-in-law, Lucille.

[Be compassionate]

This can be a tough time, and the information out there can be confusing.

[Provide information in multiple, non-threatening ways. They will do what is easiest for them. Give them a chance to hear from other people who have used your service. That is what this generation trusts.]

Our website has facts you need to know and testimonials from people we serve, as well as information on our caregivers. Here is the link:

We've attached a brochure as well.

We'd like to help you find the perfect senior living solution for Lucille. I know she must be important to you, and it might be better if we talk with you directly to better understand her needs and yours. We can certainly provide you with references and reviews.

[Call to action.]

Would you like to set that up? What day would you like to talk next week? We can call you at your convenience. Or, feel free to call me at any time with questions.

Thank you.

Sincerely, _____

[Numbers too]

****What not to say and other recommendations:**

- Don't use absolutes: "We are the only solution, we are the best, only we can give you the care options your loved one needs." It's not true, and they know it.
- Don't assume your recipient has knowledge of technical/ medical terms, or care services names. Instead say/write "what we mean by that is..." or "that includes..."
- Be careful about inviting yourself to their home, especially if you suspect they live alone (or only with the patient/loved one).
- Don't try to upsell unless you really feel that you can explain that they need it!
- Be very careful about formerly gender-specific language or topics. For example, don't assume males know the finances & women don't; or males don't know household situations & women do; that they know intimate details of the other's personal anatomy, etc. They may or may not, so ask! Every person is different.

- Be aware of generational differences. Younger folks may not get as annoyed or embarrassed as older folks.
- Even if they say they've been researching a topic, don't skip over main points. Say something like "Because you've been on the internet, you've probably seen that this condition will likely _____. We can help you with that."
- Be a guide, a resource, a lifeline.

Expert approach #1 from Bonnie Daneker, Write Advisors (www.writeadvisors.com):
Hi Melinda,

I see that you contacted Margo Lee at Caring.com to get a caregiver for your Mother-in-law, Lucile. I understand that the best way to communicate with you is via email.

We have been helping families in the Winter Park area for the past 4 years and would love to come out and meet with you and your Brother-in-law to better understand his situation and his needs. I wanted you to know that we can provide almost all the non-medical help a person might need such as:

Companionship

- Transportation to appointments, meetings, lectures, classes, bingo, worship services
- Planning for outings & visits
- Medication reminders
- Morning wake-up calls & evening bedtimes
- Mail letters, correspondence, & bill paying
- Crafts & hobbies
- Gardening
- Grocery list preparation & shopping
- Assistance with meal choice for particular dietary needs

Home Services

- Light housekeeping
- Plan, prepare & clean up after meals
- Laundry assistance & ironing
- Clothing selection & care
- Morning wake-up calls & evening bedtimes
- Changing linens & bedclothes
- Drop off & pick up dry cleaning
- Assist with shopping & errands
- Pet care

Personal Care

- Grooming
- Bathing
- Hygiene assistance
- Feeding assistance

Our prices range from \$18-20 an hour. Please feel free to reply back to this email, or call me at (505)-550-5050 so I can answer any initial questions you might have.

New Referral: Home Care for Bill Green

[Background] Below, the notification email you'll receive from Caring.com:

Hello,

Bill Green wants to hear from you! He lives in Pasadena and is seeking help a few hours a week for his father, Ed Green, who lives in San Diego County, up near Cuyamaca College. Contact Bill at (500) 500-5000. Let's work together to find the perfect senior living solution for Bill.

Thank you! Margo Lee – Family Advisor, Caring.com

Contact: Bill Green
Relationship: Son
Phone Number: (500) 500-5000
Email address: Wgreen@email.com
Care Recipient Information
Inquiry on behalf of (name): Edward Green
Seeking: In-Home Care
Requires Care: 30-days
Living situation: Alone, San Diego, CA

Your Task: Write a call script for contacting Bill about his father's home care needs.

Expert approach #1 from Megan Fletcher, Caring.com

[Call Script] Hi Bill, this is Mauricio Smith with the Best Homecare Agency. I received your information from Caring.com, in regards to your inquiry for homecare services for your father Ed. We would love to be the solution for you and your father. Do you have time this week for us to meet to further discuss how we can help with your father's care needs? Thank you for taking the time to talk with me and I look forward to meeting you and Ed later this week.

[Voicemail script]

Hi Bill, this is Mauricio Smith with the Best Homecare Agency. I received your information from Caring.com, in regards to your inquiry for homecare services for your father Ed. We would love to be the solution for you and your father. It would be great for us to connect this week to further discuss how we can assist you and your father. Please feel free to contact me at 123-456-7890.

Expert approach #2 from Jeanine Aspen, DEI Sales (www.Dei-Central.com)

Objective: Get an appointment for a care consultation

Attention:

Hello, Mrs. Green.

Identification:

My name is _____ from ___Community__Home Care. Bill, you may recall that your family advisor from Caring.Com, Margo Lee mentioned Community Home Care when she was speaking with you about your father's situation? Well, she asked that I reach out to you to discuss our services and how they may be helpful for you. Essentially we provide non-medical home care services that can range from just a few hours a week, helping with some cooking or shopping, companionship...to a much more comprehensive plan providing many more services.

Purpose: schedule a time to interview

But so the purpose of my call is to schedule some time for a phone conversation so that I can learn a bit more about your father, his situation – and answer any questions you have. Or is now an OK time?

ANSWER: Yes, I can talk now.

[Interview]

- **YOUR QUESTION:** Can you tell me about your father's situation? I understand that he is quite independent but you thought he could use a few hours of in-home care a week?
- **ANSWER:** Yes. My mother died 6 months ago. And I think he just needs a little help with groceries and maybe his clothes and laundry. Mom took care of all that and I think he is a little lost.
- **YOUR ANSWER:** Absolutely, those are the types of services we can certainly provide. Typically what we do, Bill, is start with an in-home Care Consultation. During this consult in your father' home we would visit with your father and any other family members that would like to attend. We would discuss his needs and get to know him. And then we can give you a service plan. And we'd want to match him with a caregiver that we think would fit his personality.

Purpose: Schedule a face-to-face meeting

Would you be with your father during a consultation, Bill?

- **ANSWER:** Yes, I'd like to be. But first I'd like to understand the cost of your services.
- **YOUR ANSWER:** Sure. Our average cost is \$22/hour with a minimum of 3 hours per week. But some of our clients actually pay less than that out-of-pocket if they have a LTC insurance plan that applies benefits to some of these activities of daily living. Does your father have a LTC insurance plan?
- **ANSWER:** He does. But I don't know if it would cover this.
- **YOUR ANSWER:** It would be good for you to review the plan. I can help you read through it if you can bring it to our consult.

- **Appointment:** I don't know when you plan to be at our father's next? But my first available opportunity to be in San Diego County would be this Thursday at 10:00 am. Would that work for you, Bill?