

A close-up photograph of a caregiver in a grey sweater holding the hands of an elderly person with white hair. The elderly person is wearing a blue shirt and a plaid blanket. The caregiver is looking down at the hands with a gentle expression.

How to Set and Conduct Client Assessments that Convert Home Care Leads into High Value Clients

Caring.com Digital Marketing Academy | February 11th, 2021

Welcome to Our Webinar



This presentation will be shared within a few business days.

Please ask questions – we'll have Q&A at the end.

2021



Today's Presenter: Peter Droubay

- Renowned corporate trainer
- Helped build The Senior's Choice and Hallmark Homecare
- Joined Caring in April 2017
- Led Caring's hiring and training of Family Advisors; now leads Directory Sales



Peter Droubay



What We'll Cover Today



- A Winning Sales Process
- The Advantages of Conducting Assessments
- Sales Psychology that Leads to Success
- Tips for Outstanding Assessments
- How to Propose a Care Plan
- The 7 Biggest Mistakes
- Q & A





A Winning Sales Process

This is not a “one-call close”.



The Wrong Way to Handle Online Leads

- Unfortunately, many homecare agencies have no sales system.
- Because there is no defined process, they wind up calling and trying to close every sale over the telephone.
- This is not an effective way to convert leads to clients. Most won't buy.
- Those that do become clients, will bill very few hours.

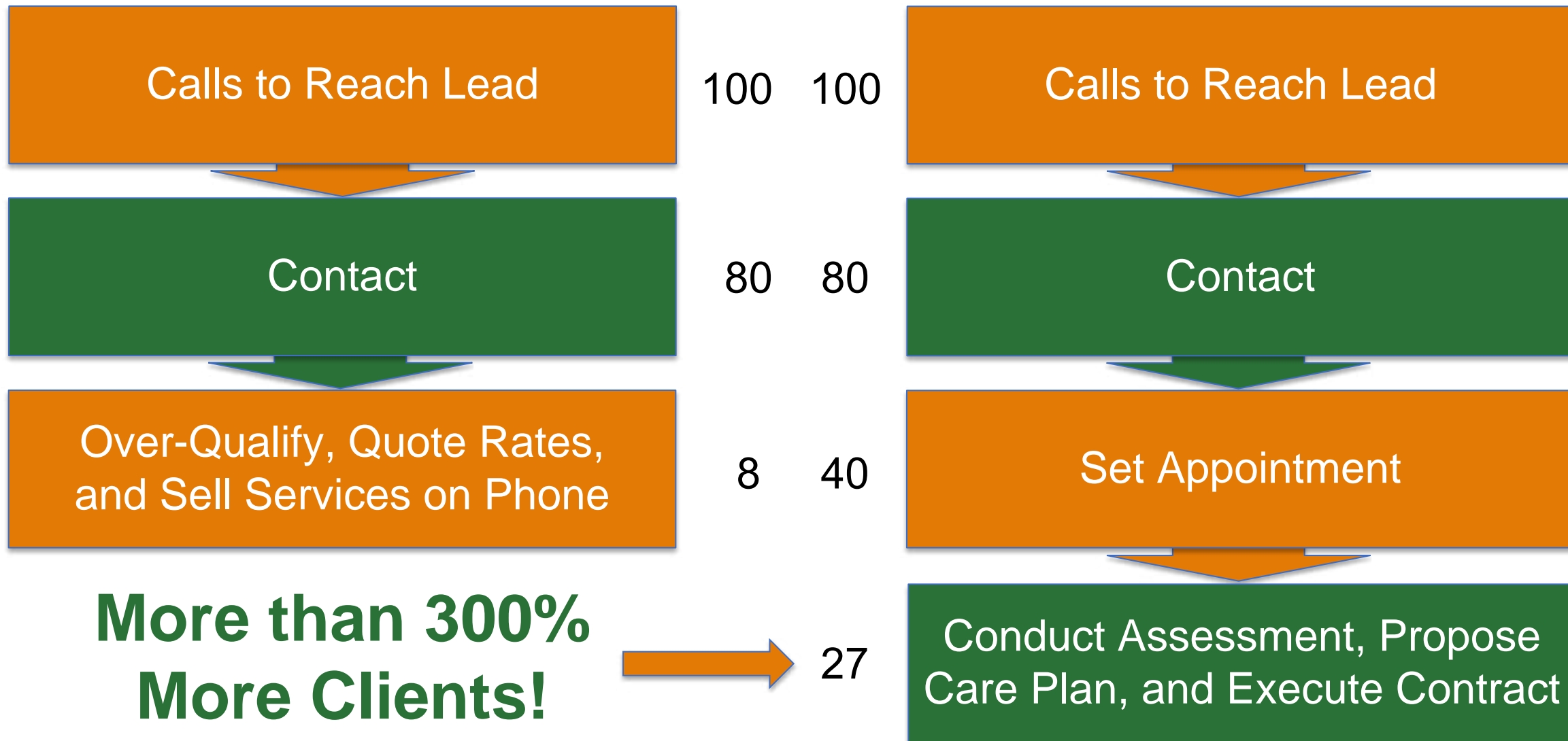


The Most Successful Agencies

- Dedicated administrator who handles the phones
 - Provides for greatest speed to lead
 - Specialization: Improvement from experience and repetition
- Multiple calls to consumer
- Phone coordinator effective at scheduling home visits for assessments
- Agency does assessment and gets signed contract in single visit



The Comparison for 100 Leads



2021



Benefits of a Great Assessments

- More Clients
- More Hours
- Better Ability to Serve the Client
- Better Ability to Assign Caregivers
- Rapport and Connection with Clients
- Better Reputation



Why Don't Many Conduct Assessments?



- We've Gotten Lazy with Professional Referrals
- No Clear Assessment Process
- Worry About the Time Needed to Carry-Out Good Visits
- Fear of Rejection that Leads to Over-Qualifying
- Ignorance





How to Set Appointments

Key Script Points



Key Points for Setting Up Visits

- Ask “What prompted your search for care?”
- Listen to answers and ask more about their situation.
- Do not talk about yourself or “sell” your agency right away.
- Offer information as a gift (report, video, checklists, etc.)
- Offer an in-home assessment as a way to plan their care.
- Use alternate choice close to set time.
- Once time is set, get all decision-makers to the visit.
- Do not quote rates, just ranges if asked.
- Do not over-qualify, and whatever qualification is done, do it after the appointment is set.
- Watch recording of previous webinar conducted on 4/23/2020



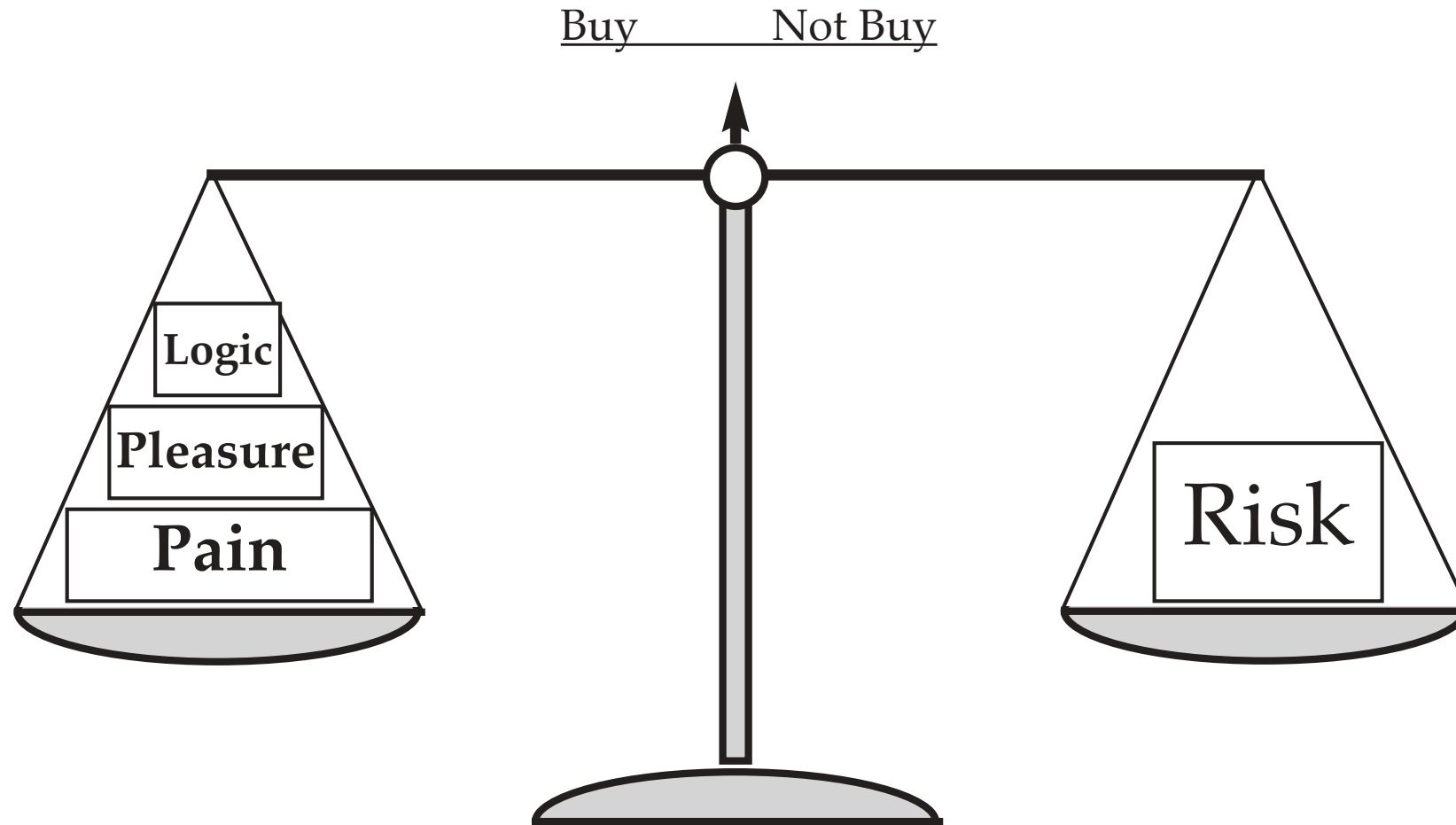


Fundamentals of Sales Psychology

How to Influence and Persuade.



Sales Skills 101



People “Buy” Because...



- They are in a “buying state”.
- They associate pain to their present situation.
- They see a pleasurable alternative.
- The alternative “makes sense”.
- The risk is not overwhelming.



It's Our Job To...

- Manage the client's state.
- Help them feel the pain in their present situation.
- Paint a picture of a pleasurable alternative.
- Help them justify the alternative.
- Minimize the risk.

How do we accomplish this?



Questions Are the Key!

Learn to ask effective questions and you will be very successful.



Tellin Ain't Sellin!



Three Types of Questions

➤ Information Gathering

- Get the facts

➤ Pleasure Accessing

- What do you love/enjoy/desire?
- What do you like most about that?
- What's the best ____? What's your favorite ____?

➤ Pain Accessing

- What's not going well?
- How does that make you feel?
- What scares you / worries you about that?



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The Assessment Visit

Not Every Visit / Assessment is Equally Impactful.



Tips for Successful Assessments

- Arrive on-time.
- Build rapport.
- Tour the home when possible.
- Repeat the main motivation for their search.
- Get permission to ask a series of questions.
- Get permission to take notes.
- Pull out your form and ask the questions on the form.
- Ask additional emotion-inducing questions.
- Note possible service hours on form.
- Don't talk about your services until it's time.



What's on the Form?

- Avoid being “clinical”! You must elicit emotion.
- Start with their history and living situation:
 - How long have they lived there?
 - Married? Family in the area?
 - What do they like to do? Hobbies? Interests?
- Go through the Activities of Daily Living (ADLs):
 - Cooking, Cleaning, Laundry, Mobility, Transportation, Bathing, etc.
 - Ask who's doing and how. Dig for the pain, include the family.
- Ask about disease and chronic conditions.
 - Diabetes? Loss of senses? Alzheimer's or Dementia? Arthritis?
 - What does that prevent you from doing?
- Ask about biggest fears and concerns.
- Save details about medications, emergency procedures, insurance, and more for the decision.



CLIENT ASSESSMENT FORM
(This form should be updated regularly to reflect any changes in client status. File the original in the Care Plan Book and a copy in the client's confidential file.)

Date of Assessment	Person Conducting Assessment
Circumstances of Interview	
Name	
Address	
Phone Number(s)	Date of Birth
Current Living Conditions	
Brief History	
How long of current residence?	When from
Why moved?	Where?
Who with?	Personal circumstances?
Other significant events	
History of alcohol use or other drugs (Alleging?)	



Elicit Emotion

Listen for pain and pleasure and ask follow up questions to get them to talk about it.



Ring
the
Bell!



During the Assessment: R.A.P.P.

- Rapport
- Ask Questions / Access Emotion
- Propose Care Plan
- Pricing and Payment



How to Propose a Care Plan

Remember: Point, Tell, & Paint...Then Test Close

Point: “So, from what you’ve told me, you could really benefit from _____. Is that true?”

Tell: “Well, I can _____ for you, which means that rather than _____, you can have/do _____, _____, and _____.”

Paint: “In other words, you’ll experience _____.”
Or “Can you imagine how you’ll feel when _____ is happening?”

Test Close: “If we were going to do this for you, ...”



Pricing: Plain and Simple Talk

- Add up hours on your form.
- Multiply by your hourly rate.
- Quote a total for the hours proposed.
- Ask them, “Will that take care of everything or are there things we missed?”
- Let them either accept price or object.
- If they say they can’t afford it, ask, “What is your price point for the care you need?”
- Then work to tailor your plan to their price point.





Biggest Mistakes

What not to do.



Biggest Mistakes

- ✘ Not intending to visit and assess before selling.
- ✘ Over-qualifying before setting appointments.
- ✘ Not having a scripted assessment form.
- ✘ Getting too clinical and not eliciting emotion.
- ✘ Being afraid of the emotion or talking over it.
- ✘ Hedging on care plan in fear of quoting too much.
- ✘ Avoiding plain talk about money.



Biggest Mistakes

✘ Not partnering with Caring!

To get really good at converting leads into clients, you need more leads. We can provide you with:

- A listing on high-ranking sites
- Tools to gather reviews and manage your online reputation.
- Screened leads
- Education and best practices.



Q & A



Key Takeaways



Results are much better when your sales process includes an in-home assessment before selling your services.



To influence and persuade, you must access emotion – pleasure and pain. The best way to do this is through questions. Done well, assessments accomplish this.



Develop scripts and processes for every part of your business. You should have a standardized assessment form to work from.



Trust the system: Ask the questions, elicit emotion, point out what you can do for them, build a care plan, quote a price, and ask for the business.

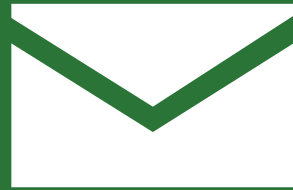


Thank You!

We Welcome Your Feedback and Suggestions



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