

HOME CARE PULSE®

Get More From Your Scores – Part 1

Understanding & Acting on Client Feedback

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

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



Get the details at
www.homecarepulse.com/awards

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



Today's Agenda

- » Explore and discuss how you can improve Client Satisfaction Scores in 5 Categories (Caregiver Performance Questions)
 1. Caregivers Work Ethic
 2. Timeliness of Caregivers
 3. The Training & Knowledge of Caregivers
 4. Compassion of Caregivers
 5. Caregivers Appearance & Cleanliness
- » Explore and discuss how you can produce a happier Client

Let's Take a Poll – Quality Management Tenure

Now Showing
"THE CLIENT EXPERIENCE"

Starring: You and Your Care Team



Front Stage vs. Back Stage

- » **Front Stage** – Your caregivers are your front stage performers
- » **Back Stage** – “Everything that occurs Back Stage is determined, measured, and judged by how well it contributes to the results achieved on the Front Stage. The growth of the Front Stage quickly comes to a stop unless the Back Stage is continually growing.” - Strategic Coach

Front Stage vs. Back Stage

Example Activities

- | | |
|---|---|
| <p>Front Stage</p> <ul style="list-style-type: none"> » Quality of care » Impression of caregivers » Response to problems » Inquiry calls » Invoices » Coordination of schedules | <p>Back Stage</p> <ul style="list-style-type: none"> ✓ Training programs ✓ Recruitment & retention ✓ Quality Management ✓ Sales strategy ✓ Billing system & design ✓ Quality Management Meetings |
|---|---|

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](#)

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.

The Power of Client Perceptions

The Filthy Airline Tray

- » What virus am I going to catch from touching this?
- » If they don't clean the trays, what else don't they clean?
- » This airline must not pay attention to detail.
- » Are they maintaining the critical equipment that keeps this thing in the air?



Learning to Manage Client Perceptions *(Their Realities)*

- » Do the caregivers know how to keep themselves busy?
- » Is timeliness managed and communicated as a priority?
- » What level of confidence do your caregivers promote to your clients?
- » Do your clients feel safe? Do they feel cared for? Compassion should never be a "nice thing to have but not necessary requirement."
- » What level of professionalism is being communicated?
- » "The Sleeper" – Are my clients perceptions being borrowed by my caregivers?

Pay Attention to Feedback!

"Feedback is the breakfast of Champions!"
- Ken Blanchard

"A complaint is a gift!"
- Aaron Marcum ☺

Improving the "Perception" of Caregiver's Work Ethic

- » Latest Best of Home Care® Benchmark – **9.29**
- » Feedback Red Flags

- » 10 – "[The caregiver] always goes further than what is required"
- » 8 – "Betty is good but it would be nice if she had more initiative"
- » 7 – "The caregivers...sit a lot"
- » 7 – "I expected a little more interaction with my husband than we have received..."
- » 6 – "The caregiver is afraid to shower my dad..."

Improving Perceptions – Caregiver Work Ethic

- » *Detailed Assessments! Make sure you understand what the client, and their families, expect from the caregiver.*
- » *Detailed 'Client Care Plans' in every clients home. Spell out the expectations. Make sure these plans are up to date!*
- » *Consistent "Spot Checks" to ensure things being done according to the care plan*
- » *Lounging is never okay, unless you are engaged with the client in a productive activity or conversation.*
- » *Train your caregivers to look for things to do and improve. Teach them the importance of being pro-active. i.e. Dishes should never be piled up in the sink while on duty. Vacuum on every shift. Bathe [this certain client] on every shift.*

Improving the
"Perception" of
**Timeliness of
Caregivers**

- » Latest Best of Home Care@ Benchmark – **9.59**
- » Feedback Red Flags

- » 9 – *"She is usually always on time...and the office always lets us know if she is held up."*
- » 8 – *"For the most part, the caregiver is on-time..."*
- » 7 – *"Sometimes Jen can be a little late..."*
- » 7 – *"Hit & miss..."*
- » 6 – *"She usually is running 5-10 minutes late..."*

Improving Perceptions – Timeliness of Caregivers

- » **The Catalytic Mechanism – Telephony Time Systems** *(include clock-in/out times on bills)*
- » **The Timeliness Training Meeting – Establish Accountability**
 - 2 to 3 timeslots...try and get everyone there
 - Use feedback and scores to express your concerns to everyone
 - Express the negative impact tardiness has on client satisfaction
 - Offer pointers – i.e. Plan ahead, road construction, leave early
 - Call the office when running late or in emergencies!
 - Accountability – Train them on the telephony system. Dupe=Fired.
 - Put it in writing – Layout the rules and accountability and have them sign it (Position agreement)
 - Discipline Guidelines – 2 verbal warnings and a written notice. 4th offense may result in termination.

Improving the "Perception" of The Training & Knowledge of Caregivers

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

- » 10 – *"She just seems to know what to do..."*
- » 8 – *"The training has varied with each caregiver..."*
- » 7 – *"She keeps feeding my dad Macaroni & Cheese..."*
- » 7 – *"...her domestic side just isn't there yet."*
- » 6 – *"I feel like the one doing the training..."*

Improving Perceptions – Training & Knowledge

The Four Recommended Outcomes of Caregiver Training

1. *Professional Caregiver Skill-set*
2. *Expectations Clearly Understood*
3. *Promote Greater Confidence in Abilities*
4. *Focused on Client Satisfaction*

Professional Caregiver Skill-Set

» New Hire Training & Orientation

- Spend at least 10 Minutes on Each of the Following Subjects & Include in Training Manual (Quiz/Test on All):
 - Dementia Basics
 - Communicating with Dementia Clients
 - Death & Dying
 - Effective Transferring – Hands on (Provide props, such as bed, wheelchair, & transfer board, etc.)
 - Compassionate Care giving
 - Bathing & Incontinent Care
 - Fall Prevention & Recovery
 - Infection Control & Blood Borne Pathogens
 - Medication Management
 - Nutrition, Meal Prep & Food Storage/handling
 - Elder Abuse & Neglect
 - Many other options not listed

Expectations Clearly Understood

- » **Position Agreements** – What do you expect from them? Have them sign it.
- » **Client Care Plans** – What does the client/family expect them to do?
- » **Follow-up** – Remind them of your expectations often. In-service trainings, orientations, supervisory visits, etc.
- » **Accountability** – At least annual performance reviews. Keep track of their performance. Make sure you know you are paying attention!

Promote Greater Confidence in Abilities

- » **Hands on training!**
- » **Ongoing Training**
- » **Certification & Testing Programs**
- » **Training Award Programs**
- » **Private and Public Praise (More on this later)**
- » **Formalized Training using videos, props, online, etc.**
- » **Caregiver introductions**
- » **Formalized Caregiver Mentor Program**

The Benefits of an Effective Caregiver Mentoring Program

- » **Focuses your retention program on your best Caregivers**
- » **Provides a "Career Ladder" for your Caregivers**
- » **Produces better trained Caregivers**
- » **Accountability for newer Caregivers**
- » **Produces greater confidence among Team Members and Caregivers**
- » **Helps clients feel more safe and secure**
- » **Helps drive client and employee satisfaction**
- » **Helps drive client and employee referrals**
- » **Empowerment**

Did an Industry Mastery Webinar on the Mentor Program in November. If interested in purchasing this presentation, contact Cassie.

Keep Them Focused on Improving Client Satisfaction



Improving the "Perception" of The Compassion of Caregivers

- » Latest Best of Home Care® Benchmark – **9.63**
- » Feedback Red Flags

- » 10 – *"The care they put in their work shows their compassion."*
- » 8 – *"I can't complain. She works hard but rarely stops to talk with me."*
- » 7 – *"I really like her but she seems irritated at me sometimes..."*
- » 7 – *"...She is really nice but way to rough when bathing my husband."*
- » 6 – *"I feel like the one doing the training..."*

Improving Perception The Compassion of Caregivers

- » **Compassion usually comes naturally**
- » **When interviewing applicants, ask questions that get them to demonstrate their compassion**
 - "Why did/do you want to become a caregiver?"
 - "What types of volunteer work do you do?"
 - "Tell me about the last client you cared for? What did you do for him/her?"
- » **Train and re-train them to be gentle and to be engaging.**
- » **Compassion starts at the top. Treat your caregivers with as much respect as you treat your clients.**

Improving the "Perception" of The Caregivers Appearance & Cleanliness

- » Latest Best of Home Care® Benchmark – **9.68**
- » Feedback Red Flags

- » 10 – "They all look professional."
- » 8 – "They dress fine but are a bit casual."
- » 7 – "The caregiver walks around in a t-shirt, even when it is cold outside."
- » 7 – "...if they are over thirty their appearance is fine but younger than that they are sometimes sloppier."
- » 6 – "The caregiver is really nice but she wears the same uniform everyday...it sometimes smells."

Which Plumber Would You Use?



Improving Perception Appearance & Cleanliness

- » **Think of the Airline Tray** – Same holds true
- » **Establish a strict dress code** – No t-shirts, no jeans with holes, etc.
- » **Consider a Uniform Policy (Themes & Variations)**
 - Lanyards with name tags. Clean dress. Best of Home Care® pins on their way!
 - Scrubs (Same colors as your logo, etc.)
 - Polo shirts: For those whose clients don't want to be seen with someone with scrubs.
 - Uniforms identify your agency. Set yourself apart.
- » **Hygiene Code / Training**
 - If they have a problem, you must let them know. "I've noticed..."

Clients Borrowing Their Perception – From Your Caregiver

- » **Caregivers frustrations with your agency can play out in the clients home**
 - “I am only making \$ _____. That hardly takes care of my family.”
 - “I can’t believe they didn’t call you to tell you I was late. That is very inconsiderate.”
- » **Strict policy on sharing information – Position Agreement**
- » **Proper Outlet – Caregivers must feel comfortable expressing their frustrations to you and your team**
- » **A Happy Caregiver is the BEST medicine**

Producing More Happy Caregivers

- » **How do caregivers 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!

Improving Client Satisfaction Often Begins with a Strong Hiring Strategy

- » **Ideas for Your Hiring Strategy**
 - Advertise and promote recruitment everywhere you can! (See 2012 & 2013 Benchmarking Studies for top recruitment sources)
 - Detailed Hiring Ad: Weeds out mediocrity
 - Online Application: Streamline your process
 - Interview Day: Keeps applicants from wasting your time
 - Screening & background checks: Do not put someone in the field without doing this first
 - Orientation Day: Do not put someone in the field without first understanding “how you do things here.”

Interview Day Activities

- » **Online Pre-Employment Assessments:** Dedicate 1-2 computers for these assessments. Recommend Caregiver Quality Assurance®
- » **Maximum 15 Minute Interviews:** Use their application, assessment, and established interview questions
- » **Reference Check:** Have team member assigned to calling references that day.
- » **Avoid hiring on the spot:** Get input from team after interviews. Let the applicants know later that day.
- » **Background Check:** All background checks are submitted for those you decide to hire.

In Conclusion

- » **Perception is Reality for Clients**
- » **Pay Attention to Feedback**
- » **Hold Quality Management Meetings at least once a month, focused on improving client perceptions**
- » **Review and improve your Hiring Strategy. Stick with it!**
- » **Review and improve your Recognition Strategy. Train your team and your clients how to recognize and promote good performance.**

New and Improved for 2013

Offered	2012	2013
In-Depth Participation Summary	improved	✓
Historical Trends	✓	✓
Top Growth Opportunities	✓	✓
Key Performance Indicators	improved	✓
Industry Resource Directory	✓	✓
Executive Summary/ Study Highlights	✓	✓
Recruitment/ Retention Section	✓	✓
40% Discount for Participants	improved	✓
Industry Leader Highlights	improved	✓
Free Initial Personalized Report	improved	✓
State-Specific Licensing Section	✓	✓
Consumer vs. Referral Marketing Sources	✓	✓
Billable Hours and Pay Rate Comparisons	improved	✓
Findings on Affordable Health Care Act/ Employer Mandate	improved	✓
In-Depth Comparisons of Sub-Groups	improved	✓

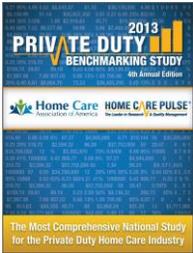
The 2013 Study

»2013 Edition coming this April

»For Survey Participants - FREE Personalized Report & 40% off the 2013 Edition (\$179) – Make sure you use the special promo code, found on your personalized report, when you order the full study.

»Didn't participate? – Still get a \$50 discount by using promo code: **pre4**, at checkout

»Pre-order now by going to privatedutybenchmarking.com.



Upcoming Mastery Webinars

- ✓ **March 21st** @ 2pm Eastern – “Financial Forecasting: Managing the Cycle of Profit and Loss” – (\$49, \$29 for customers)
- ✓ **April 16th** @ 2pm Eastern – “Getting More From Your Scores: Part 2” (Free to customers only)
- ✓ **April 25th** @ 2pm Eastern – “The 2013 Benchmarking Study: The Results Are In” (\$49, \$29 for customers)

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Questions?

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