



Client Development Market Strategies for Home Health Care Businesses

- Clarify specific market to target
- Create communication message for target markets
- Develop tools and actions
- Execute a market strategy that produces an on-going and consistent flow of new clients for the business

4 Target Market Groups

1] Affluent Seniors 62-75

- * Non-mobile seniors with built in need for a home health care
- * Affluent seniors who are motivated by the convenience of staying at home versus moving to a senior community
- * New senior residents who have not yet established a home healthcare relationship yet

2] Affluent Middle-Aged Children of Aging Parents Who Influence Their Parents

3] Existing Clients as a Referral Source

4] Outside Referral Sources

- * Certified Senior Real Estate agents
- * Internal medicine, geriatric, ortho and other healthcare practices that serve seniors
- * Mobility dealers, aging in place consultants and contractors
- * Senior care management professionals
- * Physical therapy rehab practices
- * Elder law attorneys
- * Church pastors who are in charge of senior members

A Few Ideas for Marketing Tactics and Activities

- 1] Send an intro letter and brochure to new residents weekly with home values above \$400k.
- 2] Contact general managers of country clubs that have a residential community component and request to put an announcement in their resident newsletter that your services are now available in their community. When you prepare the announcement include your phone number and web site. You should also ask if you can make your brochures available in their reception area.
- 3] Contact property or resident managers of high-end senior condo and apartment communities using the same “service now available in your property” angle and same requests as in the country club properties above.
- 4] Send introduction postcards to residents in 55 plus deed restricted communities. You can use the every door direct program offered by the USPS to save money by not having to buy a mailing list.
- 5] There are about 24 categories of businesses that service seniors with products or services [we can send you a list of these categories]. Research email addresses of each of these businesses in your market with the theme “Can We Help Any of Your Clients?” The email will introduce your business to 1,000 – 2,000 [depending on your size market] senior provider businesses. This large exposure of your business to the industry will allow you to work the percentages of such a large number to achieve several referrals. The close of the email will include a line such as “You are in the front line with your client and in a position to know if they might need us. If you find this to be the case with any of your clients, please let them know that we are here to help them have a quality of life at home”.
- 6] Target churches in affluent areas. Contact the associate pastor/minister in charge of the senior members [or the pastor if they do not have this position]. Offer to hold a health forum at the church where their members can ask questions about aging well at home. Consider asking two other complimentary businesses that offer services to help seniors stay at home to join you in presenting this event. At the event you can ask pre-prepared questions to get the program started before the audience asks questions. At the event ask for name and email addresses [set up a registration table] and hand out brochures. Prepare your own announcement [with your web site address] to give the churches for their use in announcing the event [so that you control the messaging]. Groups are always seeking activities that they can program for their members. And this free program for seniors that you can offer is very topical.
- 7] The easiest way to target affluent children of aging parents is through their professional contact information. Make a list of professions that have high income professionals [CPA’s, Attorneys, Engineers, Architects, financial planners, etc.]. Do a google search by category [i.e.

Attorneys in }fill in your city"] and obtain email addresses from each web site. If the web site does not have an email address but has a facebook logo, click through to the facebook page as in many or most cases they have an email address. Also, the chamber of commerce on-line directory and web sites for professional chapters of different professional categories are a good source for email addresses.

8] When you admit a new client to your service, a follow-up thank you card should be sent by the owner by mail within a day of their first appointment. Then another person should follow-up by telephone within a week to ten days after the first visit by the staff to their home with the reason being that "we are just following up to see how you are and to make sure your experience with us has been satisfactory so far". These gestures have a powerful impact and position you as a company that pays attention to their clients. This is unusual in the way businesses operate today and it will be remembered by the senior and their family. For existing clients, this can be done after their next service visit by your staff. This sets the course to establish a "community" with your clients to establish the groundwork for creating an atmosphere for on-going referrals of new clients from your existing client base. In the follow-up phone call one of the questions should be an inquiry into what hobbies or interests the client has.

There should be 5-6 additional communications with the client every year. A birthday card signed by the owner and staff should be sent. An article copied from a magazine or newspaper that relates to one of the personal interests/hobbies of the client should be sent at least once or twice a year with a handwritten sticky note "Thought this might be of interest". A client survey with 4-5 questions about their experience with you business should be emailed or mailed [with a return postage paid envelope] once a year. At the bottom of the survey should be the question: Do you have any friends that you might refer that can benefit from our services? Six months after a survey is sent, a personalized letter from the owner should be sent with the theme that they are seeking to grow their business and after thanking the senior for being a client, pose the statement that they would appreciate a referral of any friends that might benefit from your services.

And once or twice a year, a staff member should make a call to the client just to check and see how they are. This series of communications will serve to make for a closer client relationship and set the right scenario for when the owner asks for a referral, the client is inclined to try to help with that. Each of these communication gestures should be taken between 1 – 2 months apart.

9] The local real estate board can provide a list of the Realtors who are Senior Real Estate Specialists and certified as SRES®. This type of Realtor specializes in working with seniors and are a great source of referrals relationships. From that list you can go to their web sites and obtain their contact information. Send them a letter of introduction about your business plus a

brochure. State that the reason that you are writing to them is twofold. The first is to introduce yourself and how you can assist their senior clients. The second reason you are writing is to connect to them to develop a mutual referral relationship so that they can refer clients that need your services and you can refer clients who are in the market to sell or buy a property.

10] Contact mobility dealers and aging in place consultants and contractors by either email or phone calls. Make them aware of your services and ask them if you can send brochures for them to provide to clients who might need home healthcare assistance like yours. Do the same for care management professionals, medical supervisors at senior Independent communities and church pastors in charge of seniors. The key is to stay in touch at least four times a year with each and in addition to touching base always try to do something for them as well. Don't discount the value in establishing personal relationships to separate you from your competitors.

11] You can build an email database of elder law attorneys via a google search. Write an individual personal email to introduce your home healthcare services and the benefits of how your services help their clients stay at home. End the communication by asking that if they have any clients that might need or prefer in-home assistance that you would appreciate the referral to your business. This tactic meets two objectives. The first is to make the lawyer aware of your business in the first place and the second is to turn the attorney into your sales representative. Keep in mind that the elder law attorneys have clients that are seniors and skewer to the affluent market that can afford their fees for wills, trusts, etc. The same target market that you have.

12] Send personalized letters of introduction each week to healthcare industry sources of direct referrals for their patients. To be effective at least 100 letters should be sent each week and always signed [not pre-printed signature]. The practices that need to be focused on are:

- Physician practices
 - o Geriatrics
 - o Internists
 - o Family medicine
 - o Neuro surgery
 - o GI docs
 - o Oncology
 - o Plastic surgery
- Facilities
 - o Hospitals
 - o SNF

- o ALF with memory care
- o CCRCs

The titles of the roles you are looking for are:

Hospital/Doctor

- Discharge planner
- Case manager
- Social worker
- Post-op discharge planner
- Other potentials, but less likely...
 - o Office Manager
 - o Practice Manager

Facilities (SNF/ALF/CCRC)

- Social Worker
- Director of Nursing/Nurse/Clinical Nurse
- Other potentials, but less likely...
 - o Marketing manager
 - o Administrator
 - o Admissions
 - o Marketing Admissions Director

14] Church Fund Raising Program – develop and send emails and post cards to churches offering your fundraising program. You can tap into and have the inside track in gaining new clients from the thousands of families that belong to churches in your market. Essentially, you will donate a percentage of the fees that you receive from any of their members who become clients. This program can be an on-going source of cash flow for the churches and motivate them to encourage and refer members to use your services above other choices for home healthcare if they need them. This tactic also works with the families who have senior parents even if the senior does not belong to the church because the family can use the program to support their church.

The theme of the communication can be something along these lines:

We Can Help Your Church Raise Money and Help the Seniors in Your Congregation at the Same Time.

Our Fund Raising Program for Religious Organizations is a straightforward source of funds for you without risks or costs to you. With this program, any of your church members or their family members that contract our services to assist them or their loved one will see five

percent of any and all fees we receive from them paid to you in their name each time we receive a payment,

“Your Business Name” offers these services to our elderly clients and their families:

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

Please contact us if we can help your elderly members and be a continual source of funds for you with our fund-raising program.

Contact info and web site

A simple assignment of the 5 percent of fee release we think is the easiest way to offer the fund-raising program as an add-on to your regular paperwork for doing business and easy to understand by all parties.

15] Corporate Benefits Program – You can tap into the tens of thousands of employees of businesses from small to large corporations by offering you services and the discount you give on your fees to employees as a business perk. In a nutshell, you approach the business and offer a free employee benefit to their employees for any of the employee family members to use if they need home healthcare services.

The flow of how this works is: You offer the benefit [5-10% discount of fees]. The business publicizes this to their employees to use for any family member [typically parent or grandparents] and the employees are motivated to use your service because of the perceived company benefit and discount rate. The company is perceived as a good employer for offering a discount benefit to their people. And the people that use this are happy for quality service with the perceived price value.

If you execute this program consistently and sign dozens of companies, you are exposing your business to thousands of possible new client connections and the discount rate you offer is cheaper than you would spend on marketing to this large number of prospects.

For large companies or large professional organizations like law firms your contact will be the human resources department. For small businesses it will be the owner or office manager.

You might consider using the phrase “Business Benefit Program” or “Company Benefit Program” because these descriptions are already part of the language of business and will be more understandable to the businesses and their employees.

In Summary

The tactics cited above are intended to provide you with a few ideas on how to market to seniors directly as potential clients and to those that have the ability to directly influence seniors to become clients with a highly target approach. This is not by any means a comprehensive marketing plan but rather an outline of how you can market your business quickly without the need to spend large sums of money for client acquisitions.

This approach is what we like to call an oil field method. Choose a handful of target activities rather than just one or two. Execute each one consistently each week. Some weeks you will get “oil” from some of the areas you are drilling and other weeks you will get “oil” from other of these areas that you are drilling. But with this diversified approach, you are always finding new “oil” in the ground on a regular basis.

We are available for advice and coaching to further explain, advise and coach you with developing and implanting any part of the above strategy. There is no fee or obligation for this assistance any time that you might request it.

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Programs and Services Available From our Group

If you would like to outsource any part of your marketing efforts, these are the areas that we can assist you with.

1] Marketing Material and Content Development

We can create and produce your design and communications content for any brochures, postcards, letters, email templates, etc. that you may wish to utilize in your marketing activities. Fees quoted on an individual basis.

2] Speaking Engagements

We can develop public speaking opportunities or education forums at churches, independent living communities, country club communities and with other senior groups where you can make a presentation to a relevant audience.

3 Speaking Events \$435.00 (\$145 each)

- Includes a half page ad in Senior Lifestyles magazine for 5 months
- Guaranteed delivery of 3 Education Forum Speaking Engagements within 5 months)

6 Speaking Events \$750 (\$125 each)

- Includes a half page ad in Senior Lifestyles magazine for 5 months
- Guaranteed delivery of 6 Education Forum Speaking Engagements within 9 months)

10 Speaking Events \$999.00 (\$99 each)

- Includes a half page ad in Senior Lifestyles magazine for 12 months
- Guaranteed delivery of 10 Education Forum Speaking Engagements within 12 months

3] Senior Lifestyles Magazine

Digital version distribution of our magazine targeted to affluent seniors is about 8,000 per month in your market.

OPTION ONE - Full Page Ad - 1 month insert \$99.00

OPTION TWO - Full Page Ad - 3 months \$199.00

OPTION THREE - Full Page Ad - 6 months \$399.00

OPTION FOUR - Full Page Ad - 12 Months \$899.00 or Half Page Ad 12 months \$699.00

With the annual ad package you also receive these additional benefits:

[1] Profile article about you and/or your team in one of the issues

{2] The right to submit articles of advice [separate from your ad insertion] during any month

[3] One free additional month of ad insertion for a total of 13 months with this package

4] Email Campaigns to High Income Professionals

Our group will develop a database of professionals in high income categories, develop an email communication template [messaging about your services available for their family members] and send these to 3,000 professionals each month. Fee is \$299.00 per month.

5] Senior Experts and Providers Direct Mail Program

We are preparing a high impact direct mail piece to send to 10,000 affluent seniors in your market.. The full color mailer will be 11 x 17 sheets folded into an 8 ½ x 11 format [think newsletter look].

The title and theme of the piece is *Senior Experts and Providers*. Each participating business, professional or healthcare practice will have a choice of two types of insertions:

A half page profile with images and contact/link information [\$499]

Or

A full-page insertion which can include an article of advice to the senior plus a profile section [\$699].

There will only be one business participating in each business category.

Our group can develop and create the content with your feedback.

We are purchasing the 10,000 names of seniors in your area based on [1] at least one senior occupant between 62-75 years of age and [2] value of property starting at the highest value and descending down. This is to ensure that we are reaching our target market of affluent seniors.

This program will put you right at the home of your target market with the high probability that it will be read because if it's format look of being a guide featuring the leading businesses, professionals and healthcare practitioners in their field.

6] Church Fund Raising Programs

We can develop and set up fund-raising programs on your behalf [as described above] for you to offer your services via a fund-raising format for the church families. This includes contacting churches and securing the approval from the church, creating all the communications the church will need to promote the program to their congregation and facilitating your relationship with the church group to execute the on-going program.

3 Fund-Raising Programs \$597.00 (\$199.00 each)

- Includes a half page ad in Senior Lifestyles magazine for 5 months
- Guaranteed delivery of 3 church programs within 5 months)

6 Fund-Raising Programs \$894.00 (\$149.00 each)

- Includes a half page ad in Senior Lifestyles magazine for 5 months
- Guaranteed delivery of 6 church programs 9 months)

10 Fund-Raising Programs \$1250.00 (\$125.00 each)

- Includes a half page ad in Senior Lifestyles magazine for 12 months
- Guaranteed delivery of 10 church programs within 12 months

Please advise if you have any questions or if we can assist you with any of these marketing/communications services.

Our group specializes in creating media brands, communication tools and market platforms to connect businesses and professionals to their markets.

RJW | Senior Resources Network

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