



The 7 Pillars of Home Care Growth: More Billable Hours, More Revenue, Sustainable Success

Live Webinar

August 25th, 2026



Before we get started

- This webinar is being recorded
- The recording link and slide deck will be shared with all registrants
- All attendees will be muted during the session
- Handling Q&A at the end

Agenda

What we're learning today



About Caresmartz



Introduction



Panelists



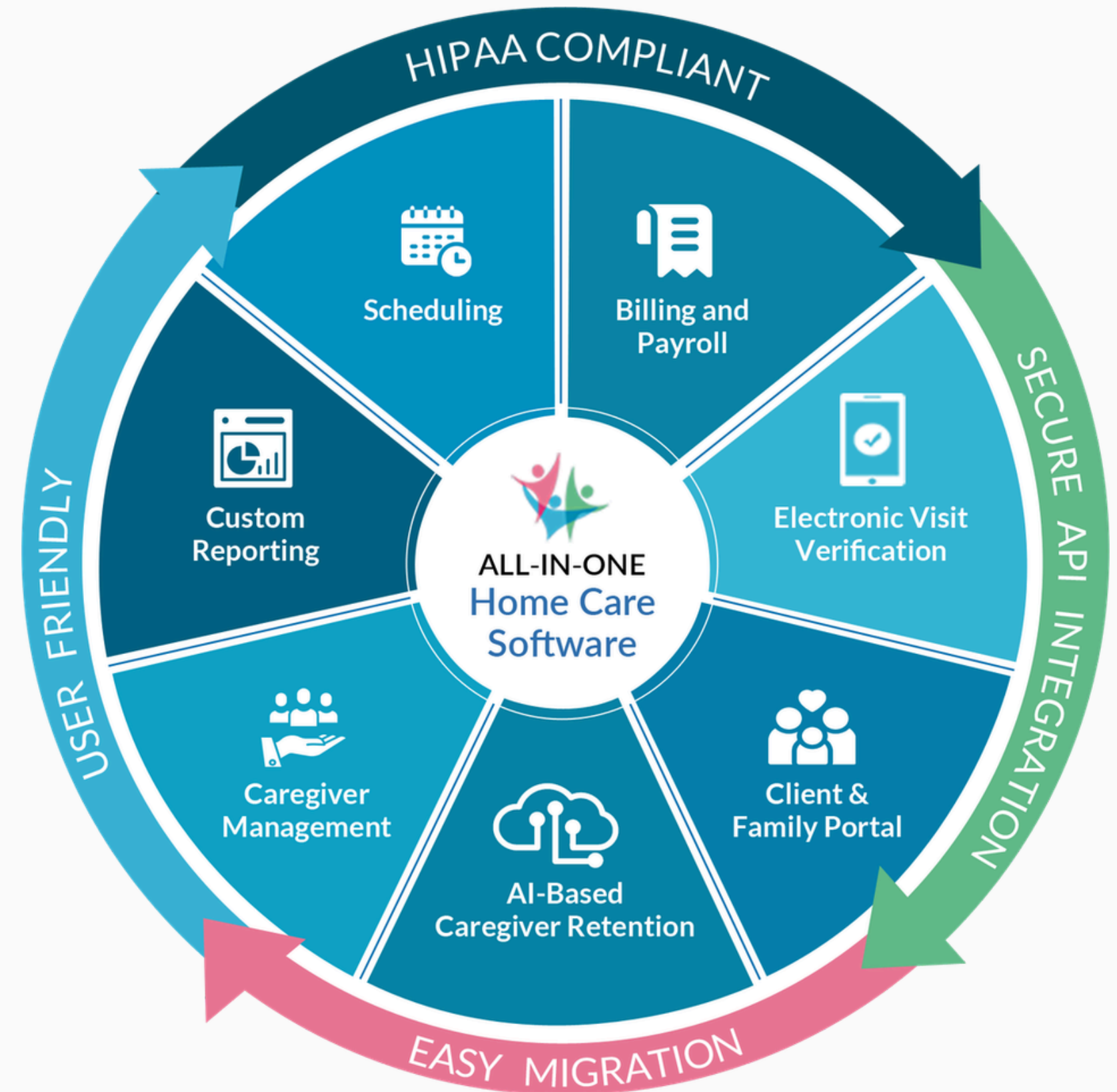
Panel Discussion



Q&A

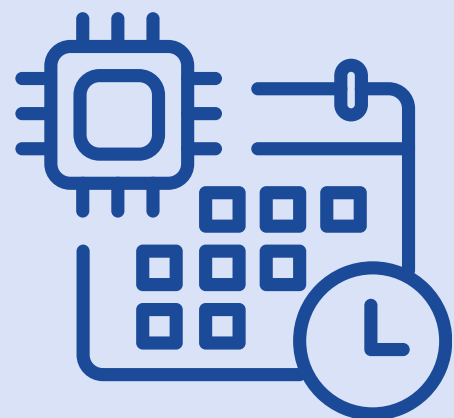
About CareSmartz360

Whether you are a home care franchisor or an independent agency, our HIPAA-compliant, AI-powered software is designed to make care easier for you through advanced features like scheduling to billing, client & family portals, and mobile apps.





How CareSmartz360 Powers Home Care Operations with



AI Smart Scheduler

Smart Scheduler analyzes caregiver availability, credentials, visit history & workload patterns in real-time to help care coordinators:



AI Care Insights

Transform caregiver notes into actionable insights by identifying trends, highlighting potential care risks, and supporting proactive oversight.



AI + Voice Notes

Convert spoken or rough caregiver notes into clear, professional, and audit-ready documentation in seconds.



AI Voice Bot

Automate caregiver shift confirmations to reduce manual calls, improve staffing reliability, and save valuable coordinator time.

Guest Speaker



Kurt Kazanowski

Founder & Managing Partner,
Hospice Advisors



Moderator



Ruby Mehta

VP of Sales



What you will take away from today



A framework for growth

A simple way to see how the pieces of your growth strategy fit together.

Seven specific steps

The seven pillars, in order, so you know what to work on first.

A few fun new ideas

Fresh, practical plays you can test in your agency right away.



It starts with creating a culture of growth

Strategy only works when the people delivering care believe growth is part of the mission.

Shared purpose

Connect growth to better client outcomes, not just to revenue targets.

Everyone sells

Caregivers, schedulers, and office staff all shape the agency's reputation.

Visible metrics

Share hours, referrals, and response times openly so progress feels real.

Recognition

Celebrate the behaviors that drive growth, not only the end results.

Leaders sustain the culture through daily habits

Culture holds when leadership behavior is consistent, visible, and repeated.



Model it

Leaders answer inquiries fast and join referral visits themselves.

Coach weekly

Short, regular conversations about behaviors beat annual reviews.

Remove friction

Fix the scheduling, staffing, and tools that make growth harder than it should be.

Hold the line

Reinforce standards consistently so the culture survives busyweeks.

Growth compounds when seven disciplines work as one

The goal is not simply more leads. It is more hours delivered reliably, profitably, and repeatedly.



- 1** | Market focus
- 2** | Billable-hour expansion
- 3** | Revenue design
- 4** | Conversion discipline
- 5** | Referral engine
- 6** | Differentiation
- 7** | Scalable operations

The biggest near-term opportunity is inside the current book

Growth can come from deeper, better-matched service—not only from adding clients.



Unmet hours

Expand schedules when needs, outcomes, and caregiver capacity support it.

Coverage recovery

Reduce unfilled shifts, late starts, and avoidable cancellations.

Service adjacency

Add respite, overnight, transportation, or companion support where appropriate.

Retention

Protect recurring hours by stabilizing caregivers and client communication.



Pillar 1: Choose opportunities the operation can fulfill

Pillar 1

Market focus

Prioritize where demand, caregiver supply, margin, and referral access overlap.

Demand

Is the need frequent and urgent?

Capacity

Can we staff the schedule reliably?

Economics

Will the hours produce healthy contribution?

Access

Can we reach buyers and influencers consistently?

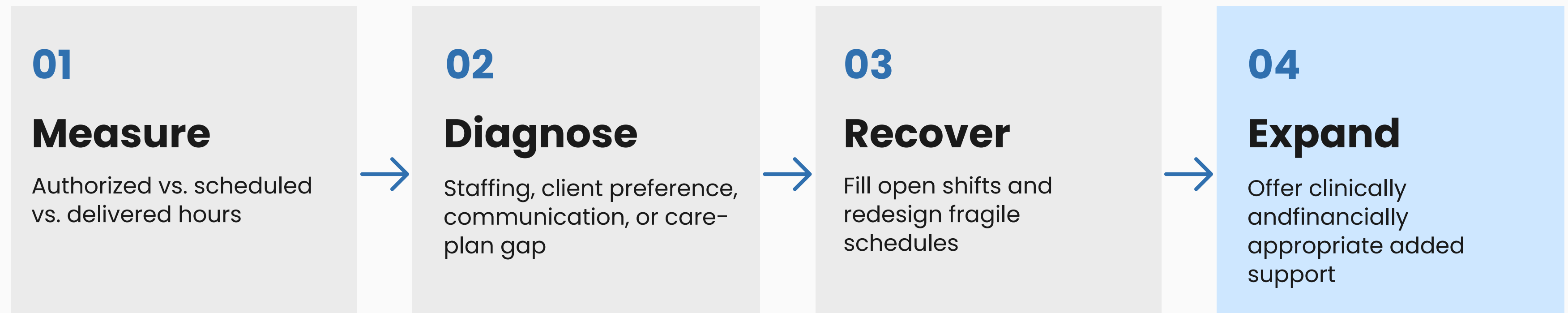
Decision rule: pursue segments you can serve exceptionally—not merely segments that look large.



Pillar 2: Close the billable-hour utilization gap

Pillar 2

Billable-hour expansion



Track recovered hours separately from new-client hours so the team sees the value of operational discipline.



Pillar 3: Turn demand into durable revenue

Pillar 3

Revenue design

- Define the right service package
- Set minimums that protect continuity
- Match price to complexity and timing
- Confirm staffing feasibility before promising

SUSTAINABLE REVENUE

Right client

× Right schedule

× Reliable delivery

× Healthy margin

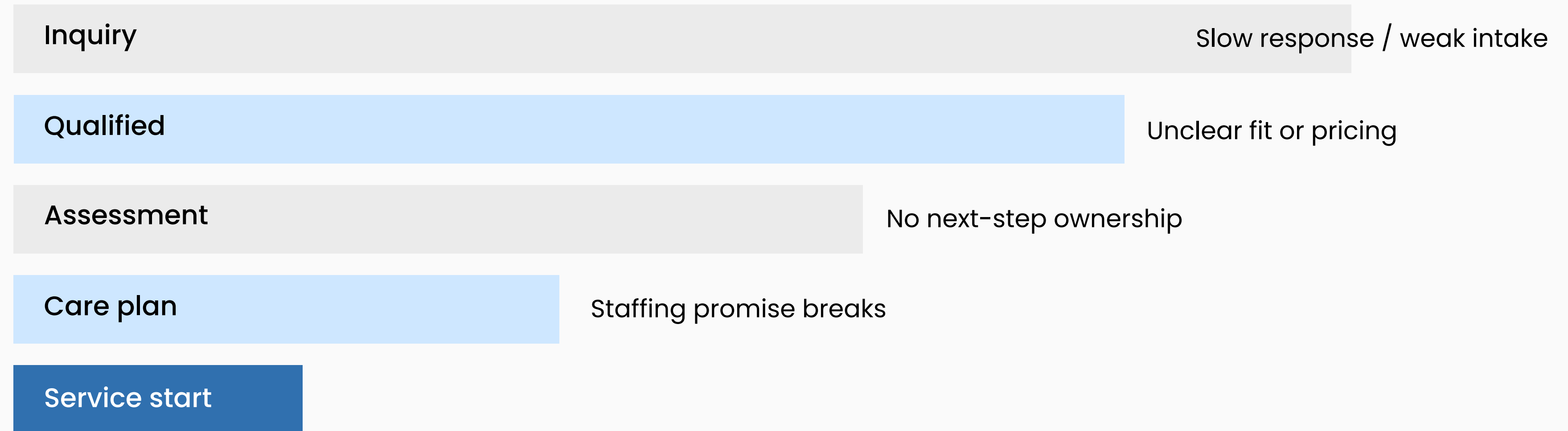
Revenue quality matters as much as revenue quantity.



Pillar 4: Acquisition leaks between inquiry and start

Pillar 4

Conversion discipline



Fix the handoffs: speed, qualification, assessment booking, follow-up cadence, and start-of-care readiness.



The invisible velvet glove on the spigot of growth

Growth is often throttled quietly by everyday habits. Three questions worth asking:

Are you capturing every inquiry?

Every call, form, and referral logged the same way, every time.

Does the phone lead to a visit?

Whoever answers should be working to schedule the assessment, not just taking a message.

Do you work a 90-day pending list?

A defined follow-up process turns not-yet inquiries into future admissions.



Pillar 5: Build a referral engine—not a contact list

Pillar 1

Referral engine

Consistency creates trust; trust creates repeat referrals.

Target

Select partners with recurring, relevant need

Earn

Make the first referral easy and safe

Update

Close the loop without oversharing

Nurture

Deliver useful follow-up on a consistent cadence



Pillar 6: Different referral sources need different proof

Checklist item	What they value	Proof your agency should provide
Hospital / health system	Safe, timely transition	Fast response, coverage readiness, clear handoff
Physician / care manager	Reliability and feedback	Consistent updates, escalation process, outcomes
Senior living community	Resident stability	Professional caregivers, responsiveness, collaboration
Elder-law / fiduciary	Risk control and transparency	Documentation, accountability, family communication
Community / faith partner	Trust and accessibility	Local presence, education, respectful service

Consistency creates trust; trust creates repeat referrals.



Differentiation must change the buying decision

“Compassionate, high-quality care” is expected. A position is a clear promise backed by an operating system.

EASILY COPIED

- Generic claim
- Broad service list
- Unproven promise

HARD TO COPY

- ✓ Defined client or need
- ✓ Distinct service experience
- ✓ Visible proof and process

Positioning formula:

We help [specific client] achieve [specific outcome] through [distinct capability].



Our true differentiators

Three capabilities families cannot get everywhere, each backed by training, process, and proof.

Dementia care

Caregivers and staff trained to support cognitive decline. We participate in the CMS GUIDE Model, which provides caregiver support, 24-hour access to assistance, and an annual benefit of up to \$2,500 toward respite care.

Long-term care insurance

We manage the process of accessing and using long-term care insurance benefits, so families can focus their time, energy, and resources on caring for their loved one.

24-hour live-in care

Families can turn a loved one's home into a customized assisted-living environment, with around-the-clock care plus help managing household routines and daily activities.



Pillar 7: Technology should remove friction

Pillar 7

Scalable operations

Technology

CRM, scheduling, telephony, analytics

Systems

Defined stages, owners, service standards

Processes

Repeatable intake, staffing, follow-up, review

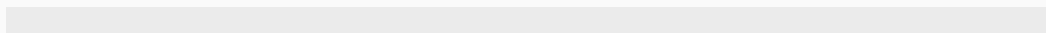
One management view

Response time • Inquiry → assessment • Assessment → start • Scheduled → delivered hours • Referral source productivity



Scale the strategy in 90 days without added complexity

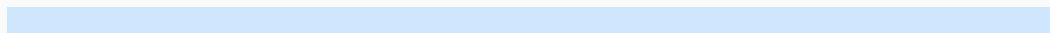
DAYS 1–30



Focus

Choose segments, map leakage, establish baseline metrics

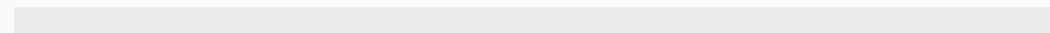
DAYS 31–60



Build

Standardize intake, hour-recovery, and referral workflows

DAYS 61–90



Scale

Coach to the process, review KPIs, double down on what converts

The scalable growth loop

Focus demand → Convert consistently → Deliver reliably → Expand hours → Earn referrals

Start with one market, one workflow, and one scorecard—then replicate.

Q&A

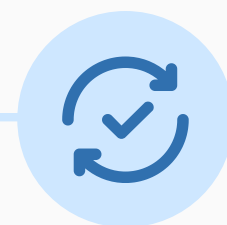




Resources & Industry Impact



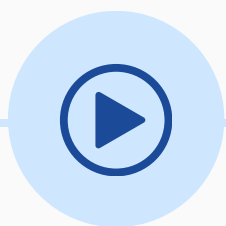
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40+ Home Care
Success Stories

Thank You!

- This webinar was recorded.
- The recording will be shared with registered attendees within 3–5 business days.

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