CareSmartz360®
A BETTER WAY TO CARE

SENIOR CARE
SALES SOLUTIONS

Beyond Donuts & Brochures: The New Rules of Home Care Business Development

ON-DEMAND WEBINAR

Before we get started

- This webinar is being recorded
- Questions can be submitted via email
- Stay till the end for key takeaways and resources

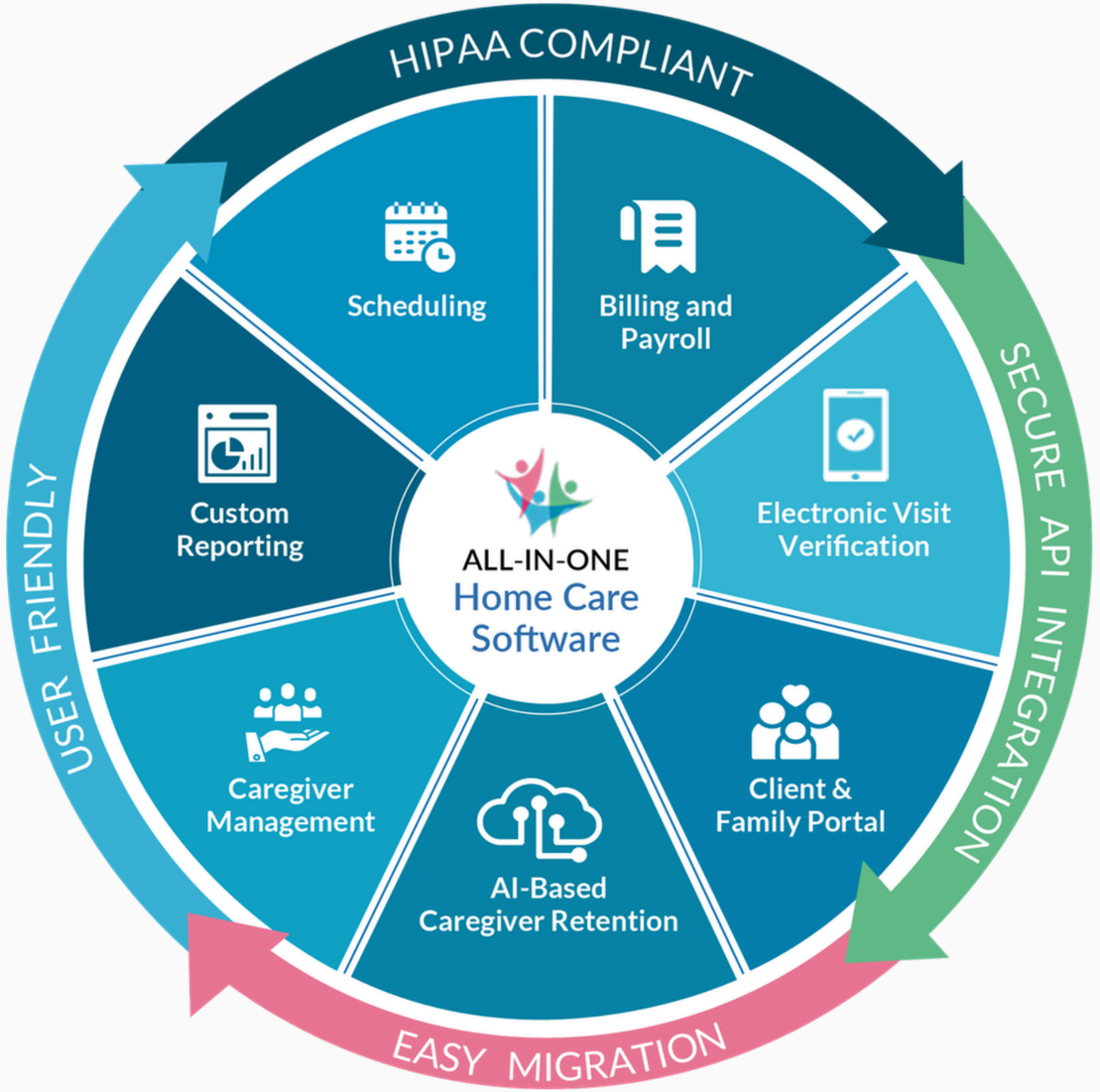
Agenda

What we're learning today

- About Caresmartz
- Introduction
- Panelists
- Panel Discussion
- Resources

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**



AI Smart Scheduler

Recommend caregiver matches for open visits, balancing skills, availability, and cost or travel priorities.



AI Care Insights

Spot trends and potential care risks in caregiver notes to support proactive oversight.



AI Voice Bot

Automate caregiver shift confirmations to reduce manual calls and save coordinator time.



AI + Voice Notes

Turn spoken or rough caregiver notes into clear, professional documentation in seconds.



AI Medication Extractor

Turn prescriptions, medication lists, and labels into editable draft entries, saving repeated typing.



AI Compliance Extractor

Fill supported profile, training, and compliance fields from uploaded documents, reducing manual entry.



AI Form Summarization

Turn spoken, typed, or recorded input into suggested answers for supported form fields.



AI Notes Summarization

Condense care, task, and family notes into one concise summary for each schedule.

Guest Speaker



Sarah Barker, CSA®

Founder

SENIOR CARE SALES SOLUTIONS

Moderator



Ruby Mehta

VP of Sales

CareSmartz360®

A BETTER WAY TO CARE

TODAY'S BIG IDEA

Stop chasing referrals. **Start creating referral gravity.**

How to move from transactional marketing to strategic relationship development and become the home care organization professionals think of first when a family needs help.

You'll leave able to:

1. Spot the old-model habits that keep BD forgettable
2. Apply 10 new rules of consultative, strategic BD
3. Run a simple operating system that connects activity to referrals

THE PROBLEM

The Old BD Playbook

Visibility without value creates recognition—not necessarily referrals.

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For years, home care business development has looked like this:

01 **Stop by an office**

02 **Bring food**

03 **Drop off brochures**

04 **Ask for referrals**

05 **Repeat next week, every other week, monthly**

The problem? Your competitors are running the exact same playbook.

Donuts aren't the problem.
Being forgettable is.

Lunch-and-learns, coffee, brochures, branded gifts, networking events and drop-ins are all fine. The mistake is believing the activity itself is business development.

THE OLD QUESTION

“Did I stop by?”

THE NEW QUESTION

“Did I create enough value to advance the relationship?”

WHAT'S DIFFERENT NOW

The Market Has Changed

Referral partners are dealing with...

- **More** complexity
- **More** choices
- **More** pressure
- **More** vendors
- **Less** time

Meanwhile, families are navigating...

Hospital-to-home transitions	**Dementia**	**Falls & functional decline**
Caregiver burnout	**Long-distance caregiving**	**Financial limitations**
Legal concerns	**Housing decisions**	**End-of-life planning**

Home care can't position itself as just another service. **We must become part of the solution infrastructure surrounding aging.**

THE SHIFT

The Old Rules vs. The New Rules

OLD RULE	→	NEW RULE
Get your name out there	→	**Become strategically relevant**
Visit as many accounts as possible	→	**Prioritize the right accounts**
Build relationships	→	**Build professional trust**
Ask for referrals	→	**Solve problems that generate referrals**
Talk about your agency	→	**Understand their world**
Sell home care	→	**Sell outcomes**
Count visits	→	**Measure movement**
Chase referrals	→	**Build referral ecosystems**

Activity isn't the objective. Advancement is.

THE ROADMAP

10 New Rules of Home Care BD

01
Stop selling hours

02
Stop making it about you

03
Understand their business

04
Expand the referral ecosystem

05
Become a force multiplier

06
Stop collecting business cards

07
Make every follow-up add value

08
Tell stories, not service lists

09
Treat speed as part of your brand

10
Measure movement, not motion

NEW RULE #1

Stop Selling Hours

Nobody wakes up thinking, “I really hope I can purchase 40 hours of home care this week.”

What they actually want:

- ✓ **Mom to stay home**
- ✓ **Dad to stop falling**
- ✓ **The discharge to work**
- ✓ **Their spouse to get relief**
- ✓ **The family to stop fighting**
- ✓ **The crisis to become manageable**

Home care hours are the mechanism.
The outcome is what people buy.



SELL OUTCOMES

What Do We Actually Sell?

- **Safety**
- **Independence**
- **Continuity**
- **Relief**
- **Confidence**
- **Lighter caregiver burden**
- **Successful transitions**
- **Peace of mind**

And to referral partners, we also sell:

Reliability.

When they refer someone to you, their professional reputation is attached to that referral.

NEW RULE #2

Stop Making It About You

THE TRADITIONAL PITCH

“We've been serving the community for 20 years.”
“Our caregivers are background-checked.”
“We're available 24/7.”
“We provide companionship, personal care and transportation.”

Important? **Yes.**
Differentiating? **Usually not.**

INSTEAD, ASK

“What problems are you seeing with older adults and families that are hardest for your team to solve?”

Now you're having a business conversation.

DISCOVERY

Curiosity Is a BD Skill

Great business developers diagnose before they prescribe.

- Where are families getting stuck?
- What causes your most difficult discharges?
- What makes you hesitant to recommend a home care company?
- What happens when families refuse the recommended level of care?
- Where do you see preventable breakdowns?
- What would make working with a home care partner easier?
- Which populations are hardest for your organization to serve?

Stop presenting long enough to discover the problem.

NEW RULE #3

Understand Their Business

You can't become strategically valuable to an organization you don't understand.

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Before pursuing an account, understand:

- **Who they serve**
- **How they make money**
- **What outcomes matter**
- **What creates risk**
- **What creates frustration**
- **Who influences decisions**
- **What problems keep recurring**

A hospital doesn't experience home care the way an elder-law attorney does. A wealth advisor doesn't experience it the way a memory care community does.

Different referral sources require different value propositions.

RULE #3 IN PRACTICE

Speak Their Language

Hospital / SNF

Safe discharge, readmissions, family readiness, speed

Home Health

Adherence, safety, complementing skilled care

Hospice

Family support, caregiver burden, continuity

Senior Living

Resident stability, aging in place, family satisfaction

Elder-Law Attorney

Helping families execute the client's care plan

Wealth Advisor / CFP

Longevity planning, care costs, protecting the plan

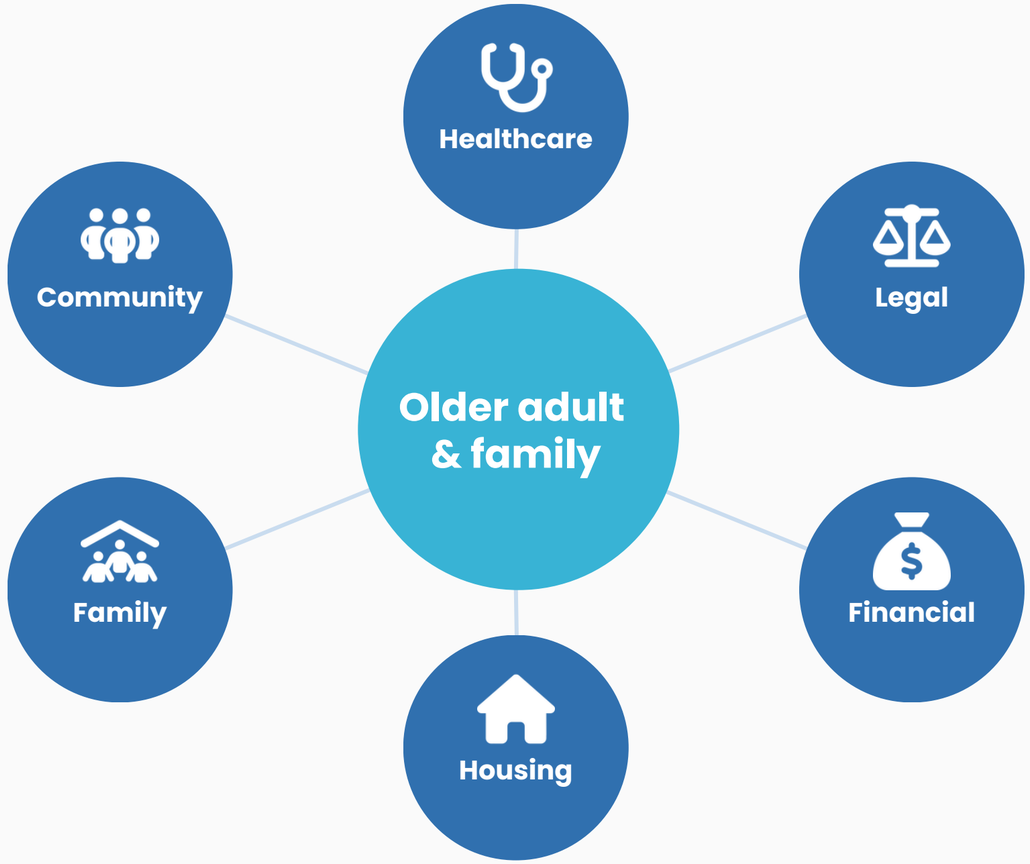
Care Manager

Reliable execution and communication

The service may be the same.
The value proposition should not be.

NEW RULE #4

Expand the Referral Ecosystem



Aging isn't only a healthcare issue.

Healthcare referrals matter tremendously—but your ecosystem should also include:

- Physicians
- Home health
- Hospice
- Hospitals & SNFs
- Senior living
- Care managers
- Senior move managers
- Elder-law attorneys
- Estate & trust attorneys
- Fiduciaries
- Trust officers
- Wealth managers
- CPAs
- LTC insurance pros

The broader your ecosystem, the less dependent you become on any single referral channel.

THE RELATIONSHIP LADDER

From Referral Source to Strategic Ally

The goal isn't more contacts.
The goal is deeper professional relationships.

LEVEL 1

Awareness

They know your company exists.

LEVEL 2

Familiarity

They know you personally.

LEVEL 3

Trust

They believe you'll take care of their referral.

LEVEL 4

Strategic Value

You actively help them solve problems.

LEVEL 5

Allyship

Both organizations intentionally create opportunities for one another.

NEW RULE #5

Become a Force Multiplier

Help solve the problem—even when you aren't the immediate solution.

“I know who can help.”

A great BD professional doesn't simply represent a home care agency. They multiply the capabilities of the professionals around them.

Maybe the family needs...

An elder-law attorney	**A fiduciary**	**A care manager**
Hospice	**Home health**	**Placement assistance**
A financial professional	**Transportation**	**Home modifications**

Helping creates trust.
Trust creates future referrals.

NEW RULE #6

Stop Collecting Business Cards

Networking is not relationship development. A stack of business cards is not a referral network.

THE TOMORROW TEST

If a family called that professional tomorrow and said, “We need help caring for Mom at home”—would your name immediately come to mind?

Recognition ≠ **Recall** ≠ **Trust** ≠ **Referral**

If your name wouldn't come to mind, the relationship isn't developed yet.

NEW RULE #7

Make Every Follow-Up Add Value

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The weakest follow-up in business development:

~~"Just checking in!"~~

Instead, bring something useful:

- Share an insight
- Make an introduction
- Offer education
- Solve a problem
- Provide a resource
- Follow up on a past conversation
- Invite collaboration

Every touch counts.

Every touch should answer:

"Why was this interaction worth their time?"

NEW RULE #8

Tell Stories, Not Service Lists

Instead of: *"We provide dementia care."* → **Tell them what dementia care changed.**

The S.T.O.R.Y.™ Storyselling Framework · people remember stories far longer than service descriptions

S	T	O	R	Y
Setup	**Tension**	**Outcome**	**Relatability**	**Your Invitation**
What was happening?	What problem existed?	What changed?	Why does this matter to this audience?	What should they do when they meet someone similar?

NEW RULE #9

Speed Is Part of Your Brand

Referral partners remember what happens after they trust you with a referral.

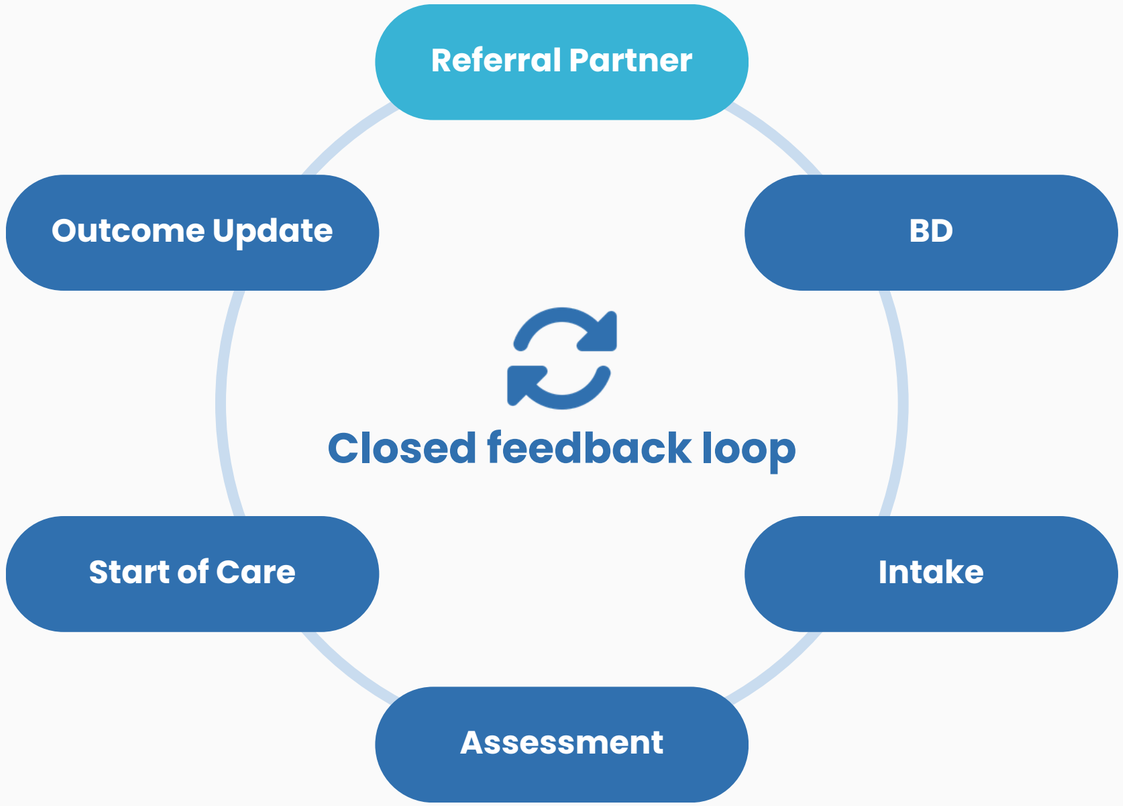


Every unnecessary delay introduces risk.
Your operational execution either strengthens or destroys your business development efforts.

Marketing cannot compensate for poor intake.

CLOSE THE LOOP

The Referral Doesn't End at Intake



One of the biggest mistakes:

BD generates the opportunity—and then disappears.

Instead, close the loop with an appropriate update to the referral partner every time.

Every successful referral should strengthen the relationship that generated it.

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NEW RULE #10

Measure Movement, Not Motion

Busy doesn't automatically mean productive.

MOTION

Visits
Calls
Emails
Events

MOVEMENT

- ✓ New strategic accounts opened
- ✓ Accounts actively referring
- ✓ Referrals by account
- ✓ Referral-to-assessment conversion
- ✓ Assessment-to-start conversion
- ✓ New weekly hours generated
- ✓ Revenue generated
- ✓ Referral-source diversification
- ✓ Dormant accounts reactivated

What gets measured should connect activity to outcomes.



PRIORITIZE

Your Accounts Are Not Equal

TIER A	**Strategic Growth Accounts**	High potential + strong alignment + recurring referral opportunity
TIER B	**Development Accounts**	Promising relationships requiring intentional cultivation
TIER C	**Maintenance Accounts**	Lower potential, but worth maintaining
PROSPECTS	**Not Yet Developed**	Relationships you haven't built yet

Stop giving every account equal time.

Your time should follow opportunity.

Revisit tiers regularly—relationships move up (and down) as you create value.

PUTTING IT TOGETHER

The New BD Operating System



Who should we intentionally pursue?

What matters to them?

How can we become useful?

What is the next meaningful step?

Did the relationship produce movement?

This changes BD from random activity into **a disciplined growth function.**

AFTER EVERY INTERACTION

What Happens Next?

Every meaningful relationship should have a next action.

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Not:

~~**“I'll stop by again sometime.”**~~

Instead:

- **“I'm sending her the dementia resource we discussed Tuesday.”**
- **“We're scheduling an education session for their social work team.”**
- **“She's introducing me to their discharge planning director.”**
- **“We're developing a process for weekend referrals.”**

THE NEW ROLE

What Modern Home Care BD Looks Like

- **Sales professional**
- **Consultant**
- **Educator**
- **Connector**
- **Strategist**
- **Storyteller**
- **Problem solver**
- **Community resource**

That's a fundamentally different role from...

~~"The person who drops off brochures."~~

From slinging hours → **solutions provider.**

THE BIG IDEA

Creating Referral Gravity

Demonstrate expertise + **Solve problems** + **Connect professionals** + **Execute well** + **Close the loop** =

REFERRAL GRAVITY

Referrals begin moving toward you—instead of your BD team constantly chasing them.

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YOUR FINAL CHALLENGE

1. Are you known— **or are you valuable?**
2. Are you visiting accounts— **or advancing relationships?**
3. Are you asking for referrals— **or creating reasons to receive them?**

“The future of home care business development belongs to organizations that stop trying to be remembered for what they sell—and start becoming indispensable because of the problems they help solve.”

Go beyond the donuts.
Go beyond the brochures.
Go beyond the referral ask.

Become the resource.
Become the connector.
Become the strategic ally.

That is the new rule of home care business development.

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THANK YOU

Let's Connect

Questions after today? I'd love to hear what you're working on.

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