Turning Inquiry Calls into Client Intake Calls

Indiana Association for Home & Hospice Care

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Expert Business Marketing Strategist
Founder, Owner and Managing Director of corecubed.
Pioneer in the home care industry with a care managed non-medical private duty business which she started in 1981.
Received Ernst and Young Entrepreneur-of-the-Year award for her success in the business.
Serves as Chief Strategic Officer for the National Association for Home Care and Hospice (NAHC) for Private Duty. Immediate past chair of the Private Duty Homecare Association of America.
Serves on the Editorial Board of the Home Healthcare Management and Practice Journal, and is a regular author contributing to CARING Magazine.
Known as the expert in Internet marketing services, backed with a powerful design team for web and print.

Overview
► Who answers the phone and how well they know how to handle an inquiry is of utmost importance.
► Other than matching the right caregiver with the client and providing excellent service, this is the most important thing to make the business successful. Inquiry follow-up process included.
Objectives
At the end of the webinar, participants should:
► Be able to identify who is best to have as the “first line defense”.
► Have learned how to ask questions that identify client needs.
► Have learned answers to overcome common objections— including price.

Steps for Success

Basics for success
► Actively listen to caller
► Have a knowledgeable person answer the phone
► Use an inquiry tracking form to get all information needed for communication
► Answer questions honestly
► Make it personal
► Sell on value and avoid quoting price
► Follow up
► Follow through
The call

The inquirer will most likely start with one of three approaches:

► “What do you charge for home care?” or
► “I have a parent/friend/neighbor who needs help, and I’d like to know how you can help me.” or
► “What services do you offer?”

The response

► First say, “Thank you so much for calling. Before I answer your question, specifically, let me get some more information so I can be accurate in my response.”
► Then ask, “Are you calling about service in MY AGENCY location?” (Because of the Internet, many people call locations that are not where the potential client lives.)

Actively listen to caller: Clarify Needs

“Now, specifically what kind of services are you looking for?”

► In their response, coach them to find out the necessary information:
► For whom are they seeking assistance?
► What are the reasons for home care?
► What is the timeframe in which they need to start care?
Actively listen to caller: Clarify Payment Possibilities

What it is they are looking for:
► Home care for which they pay a fee.
► Home care reimbursed on a sliding scale (for someone on a fixed income).
► Help with decisions regarding care.
► Help with other things relating to long-term care of a loved one or friend.

Actively listen to caller: Clarify Your Agency’s Services

For private pay, next ask pertinent questions to determine if the care/case is appropriate:
► If the caller says that the client is getting out of the hospital, find out why the hospitalization was necessary.
► If the caller says someone else needs help at home, ask:
  ► “What happened that caused the need to arise?” and
  ► “Who was providing care before now?”

Actively listen to caller: Clarify Your Agency’s Services

► Listen to the information they are giving to determine appropriateness of MY AGENCY service versus
  ► Medical service—clues to medical are IVs, tube feedings, injections (invasive procedures).
  ► Location and hours and specific needs
Actively listen to caller: Clarify Your Agency’s Value Adds

- If the case is appropriate, before giving prices, explain that all caregivers (direct care staff) are employed AND:
  - They are pre-screened with background checks (and any other screenings).
  - They are monitored, trained and supervised by our office staff.
  - The employees are covered by liability insurance, both professional and general.

Actively listen to caller: Clarify Your Agency’s Value Adds

- The employees are covered by Workers’ Compensation Insurance so that if they are injured in the client’s home, our insurance will take care of everything.
- How MY AGENCY bills. (Example: We bill weekly, bi-weekly or monthly, whatever the client wants, and all employee expenses are taken out and paid by us. We accept all major credit cards.)

Actively listen to caller: Clarify Your Agency’s Differences

We are different from other services in that (examples to be added for your specific agency):
- We match caregiver and client so that the client is satisfied.
- We guarantee satisfaction and staffing for our twenty-four hour cases.
- We are actually open twenty-four hours a day, seven days a week and staffed to handle emergencies and routine questions.
Try to get an in-home assessment

- IF the situation is appropriate for your agency,
- Before you give prices over the phone, ask if you can do a free in-home assessment.

If no in-home assessment can be secured

Price based on the information you have received

- Location
- One person or two
- Level of care needed
- Hours that may be needed

Have a knowledgeable person answer the phone

- Any call can be an inquiry
- If no one there is knowledgeable about services, get the number and have someone call back ASAP
Use an inquiry tracking form to get all information needed for communication

► Do not “read” from the form
► Ask questions in a conversational tone

Use an inquiry tracking form to get all information needed for communication

► Make certain that all important questions are asked
► Who is calling, with contact info in case disconnected
► Who needs service, and what is the relationship with the caller
► General information about services—dates, hours, etc.
► Payment information—who to bill
► What made them call your agency?
► How did they hear about you?

Overall approach

► Answer questions honestly
► Make it personal
► Sell on value and avoid quoting price
Follow up (if no assessment secured)

► Send a personal letter
► Price sheet
► Explanation of services
► Information on specifics relating to caller

Follow through

► Schedule in-home assessment
► Follow up with any information requested, referrals, etc.
► Make it a point to call back whether or not service is scheduled
► If service is not scheduled, follow up again several times, at regular intervals

Inquiry book at every desk

► Inquiry forms
► Resource listings for referring when appropriate
► Frequently called numbers
► Price sheet with service descriptions
### Overcoming objections

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<thead>
<tr>
<th>Objection</th>
<th>Solution</th>
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<tbody>
<tr>
<td>Too expensive or more than another agency.</td>
<td>Make sure the price comparison is apples to apples. Competitors' lower rates may not include items your agency covers. (Sitter versus aide, registry versus agency, workers' comp coverage.) Help them find alternative solutions within their budget—less hours, live-in versus hourly.</td>
</tr>
<tr>
<td>Minimum hours of service, i.e. Amour minimum.</td>
<td>Physically getting a qualified, caring person to the destination is the hardest part. So paying for gas (especially with today’s prices) or to add into a schedule as a long wage is earned. A minimum is necessary. Create a 2-hour service that can pay as much as a 4-hour but is a few dollars short. Or add a hefty gas allowance to even the 4-hour shifts.</td>
</tr>
<tr>
<td>In-home assessment/conference prior to starting service.</td>
<td>Explain the importance of developing an individualized plan of care and the ability to match suitable caregiving skills. Plus this is a safety factor for the client as it ensures the agency is going to provide the appropriate service staffed with the appropriate person.</td>
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<tr>
<td>A stranger in my home.</td>
<td>Over time the caregiver will become a trusted companion. Like any relationship it has to start with an introduction.</td>
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<tr>
<td>Places a discriminatory request.</td>
<td>Discuss that you send the most qualified caregivers based on abilities. Do not accept case if they insist on discriminating.</td>
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### Frequently asked questions

- Where do you get your caregivers? Who are they, etc.?
- Are your caregivers reliable?
- Can I get the same caregiver all the time?
- Can I interview my employee before start of care?
- What if I don’t like the caregiver you send?
- Are you a corporation?
- Do you accept Medicare?
- Why doesn’t Medicare cover my care?
- Does long-term care insurance cover your services?
For More Information

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