

2024



Activated Insights Benchmarking Report

Home-Based Care: Home Care, Home Health, & Hospice

Endorsed By:



Activated Insights
Formerly HCP

Home Care Pulse is now **Activated Insights**. Formerly the **HCP Benchmarking Report**, the Activated Insights Benchmarking Report marks 15 years of providing data and insights for the home-based care industry.

How to Reference the 2024 Activated Insights Benchmarking Report for Home Care, Home Health, and Hospice

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Thank you to all of our 2024 participating organizations for promoting national participation and furthering the purposes of this Report.

We also appreciate the support of many other industry leaders and, of course, all those who dedicated their time to participate in the national survey. Your support made this Report a success!

A Note About Survey Participation

Whether you are new to participating in the Benchmarking Report survey, or have been helping make the Report possible for years, we value your answers. As survey respondents come and go from year to year, please note that the data can be affected, and individual performance may vary. We are proud to have high participation in our survey; however, not every respondent answers each question, which can cause variations in the results throughout the report. Thank you for your continued support and valuable contributions.

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Glossary



Lines of Business

This year's Benchmarking Report contains data from home care, home health, and hospice providers. Each figure has a label (as shown below) denoting whether the data refers to home care, home health, hospice, or a combination of the three.

Home Care Home Health Hospice Overall

Some participants may provide multiple types of service across two or more of the lines of business covered by this report.

Median data on points marked "Overall" include the entire participation sample regardless of lines of business. For this reason, an Overall Median would be different than the median of the median numbers for each line of business.

Roles

The Benchmarking Report uses umbrella terminology to refer to related roles across lines of business.

Care Professional – Refers to any direct care worker role, including professional caregivers, companions/homemakers, personal care attendants, Certified Nursing Assistants (CNAs), and Home Health Aides.

Clinician – Refers to a licensed medical care staff member, including registered nurses (RNs), Licensed Practical Nurses (LPNs), Licensed Vocational Nurses (LVNs), social workers, and therapists.

Office Staff – Refers to employees who do not provide direct care for customers, such as schedulers, care coordinators, and other administrative staff.

Professional Caregiver – Refers to non-medical employees within home care specifically. Data referring to professional caregivers does not include data on HHAs and CNAs.

Clarifications

Customer Growth Rates – Customer growth rates are median growth rates from December 31, 2022 to December 31, 2023. It is important to understand that the smaller the agency, the easier it is to increase the percentage of client growth. For example, if an agency has 20 customers and grows to 30 in a year, they have achieved a 50% client growth rate. However, if an agency has 200 clients and grows to 210 clients (adding the same number of customers as the smaller organization), their growth rate is just 5%.

Financial Data – Financial data was only collected for home care organizations; any median financial data refers to home care only, rather than the industry as a whole.

Overall Satisfaction (OSAT) – Overall Satisfaction (OSAT) takes the average score of all rated questions in the Activated Insights Experience Survey. This metric is particularly useful for measuring satisfaction after a specific change or event.

Percentiles – Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

Weighted Data – In certain data points, data from a large franchise with a high number of participants was weighted to provide a more accurate picture of the post-acute care industry. The following data points were affected by this weighted data: Customer Growth, Revenue, and Professional Caregiver Turnover rates.

Calculations

Assessment to Admission Close Ratio – The percentage of performed assessments that became actual clients. (This number is found by dividing the number of admissions by the number of performed assessments.)

Inquiry to Assessment Close Ratio – The percentage of prospective inquiry calls that turn into a performed assessment. (This number is found by dividing the number of performed assessments by the number of inquiries.)



Inquiry to Admission Close Ratio – The percentage of service inquiries that became actual clients. (This number is found by dividing the number of admissions by the number of inquiries.)

Professional Caregiver Turnover Calculation – Professional caregiver turnover represents the percent of care professionals who quit or were terminated in 2023. Providers had to have been in business for at least one full year. Basic care professional turnover is calculated by taking the number of employees who quit or were terminated in the year and dividing that number by the average number of employees employed in the same time period.

Revenue per Professional Caregiver Employee Calculation (HC-specific) – To calculate the Revenue per Professional Caregiver Employee, divide your annual revenue by the number of care professionals employed in the same year.

Sales per Office Staff Employee Calculation – Sales per Office Staff Employee is calculated by dividing your annual revenue (or 12-month trailing revenue) by the number of office staff you employ, excluding caregivers, but including active owners. Part time employees count as .5 or 1/2.

Other Terms

Admissions – New customers who started services.

Assessments – Formal meetings to discuss the needs of the potential customer and the business's capabilities in meeting those needs.

Inquiries – Individuals who called in for services and provided some kind of contact information, such as a phone number, address, and/or e-mail.

Masters – Masters are home care businesses that generated more than \$5m in revenue in 2023.

NPS/eNPS – Net Promoter Score® is based on one question: “How likely are you to recommend [company name] to others?” It is rated on a scale of 1-10, 10 being “highly likely to recommend.” Based upon the answer customers provide, they are categorized into three groups: 1. Promoters (score 9-10) are loyal enthusiasts who will keep using your services and refer others, fueling growth. 2. Passives (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings. 3. Detractors (score 1-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

Key Profit & Loss Notes

Profit & Loss statements display median values rounded to the nearest tenth. To find the dollar amount associated with each category, multiply the median revenue by the percentage of that category.

Direct Care Expenses – These are expenses directly related to caring for clients (not to be confused with the term “Variable Expenses,” which is a common accounting term used for expenses that fluctuate based on revenue). Though many Direct Expenses, such as Professional Caregiver Wages, are also “Variable Expenses,” we use the term “Direct Care Expenses” in order to make the financial data easy to understand and specific to the private duty home care industry.

Professional Caregiver Wages – These are strictly professional caregiver wages and do not include other employer expenses, such as payroll fees.

Other Direct Care Expenses – This includes any expense related to the direct care of clients that is not covered by the other main direct care categories, such as Professional Caregiver Training, Recruitment, Background/Screening Checks, Professional Caregiver Bonuses, and Client Supplies (such as gloves, etc.).

Professional Caregiver Recruitment & Retention – Includes all expenses related to acquiring professional caregivers including job ads, postings, and networking. Also included are team wages associated with recruiting professional caregivers, background checks, and screenings. Professional Caregiver retention expenses include recognition programs, bonuses, and efforts to retain professional caregivers.

Gross Profit Margin (GPM) – Percent of revenue left after Direct Care Expenses.

Indirect Care Expenses – Also known as Fixed Expenses, this includes all overhead expenses.

Other Marketing Expenses – Consulting and other expenses not captured in the main marketing categories.

Office Support Wages – Includes all office support staff (office managers, payroll, billing, schedulers, etc.).

Executive Team (Non-Owner) Wages – This category represents top management who are non-owners.

Other Operating Expenses – Includes miscellaneous software, travel, franchise fees (if applicable), staff benefits, etc.

Other Taxes – All other taxes that are non-employee related but related to the operation of the business. Usually these are taxes against profits earned by the business.

Net Profit or Net Ordinary Income – Net income is the profit after all expenses have been deducted from revenues. Net Ordinary Income refers to the ordinary income of the fund reduced by the expenses of operating the fund. These are not shown in the key profit and loss comparisons, as only key expenses are represented, rather than all expenses.



SUMMARY

Executive Summary

Arguably the most comprehensive section, the Executive Summary introduces the 2024 Activated Insights Benchmarking Report by giving a high-level overview of major trends in this year's Report. Bud Meadows, Activated Insights' Chief Executive Officer, reflects on the effect 15 years of benchmarking data has had on shaping the post-acute care community. Jason Lee, Chief Executive Officer of the Home Care Association of America, and Kristen Wheeler, Executive Director of Private Duty at the National Association for Home Care & Hospice, share their industry insights in this section.



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KEY FINDINGS FROM THE 2024 REPORT

6 Key Industry Findings to Turn Benchmarking Data into Business Decisions

Before the Benchmarking Report, a comprehensive home care industry study was unheard of. Home care providers were tasked with navigating the complex and ever-evolving post-acute care landscape by themselves.

Now, for 15 years, Activated Insights (formerly HCP) has been collecting crucial business insights from long-term and post-acute care providers across the nation to create an industry standard for business owners to benchmark their performance and learn from experts.

As customer and employee satisfaction rises, training strategies are tested, and industry median revenue reaches the highest increase in five years, the 2024 Activated Insights Benchmarking Report is forecasting the patterns, trends, opportunities, and threats facing the long-term and post-acute care industry in 2024.

Benchmark your performance against the industry with compelling new data points across home care, home health, and hospice. Use these top findings on sales and marketing, recruitment and retention, training, finance, operations, and customer and employee experience to make data-driven business decisions.

Sales & Marketing

Finding #1: Providers are putting their energy towards creating and strengthening their relationship with referral sources—a strategy that is reaping its rewards with the highest customer growth rate in five years.

Priorities for long-term and post-acute care providers have primarily remained centered on employee recruitment and retention—until this year.

Now, providers are putting their focus more towards creating and strengthening their relationships with referral sources. This may be because **word-of-mouth referrals ranks as the top marketing source** for providers in home care, home health, and hospice, generating almost one third of all revenue.

As a result, **home health and hospice saw a 12.2% median customer growth rate** in the last year.

Home-based care's median customer growth rate increased by 4.4% to reach a **staggering total of 10.5%** 10.5%, making it the highest growth rate within the last five years.

But at what cost? Customer acquisition costs are also the highest they've been in five years, rising by \$208 in the last year to a total of \$800 per customer.

However, those who tracked every inquiry made about their services saw almost a million dollar increase in revenue compared to those who only tracked some or most inquiries.

It's never been more important to build up and manage your reputation in the industry.

In 2022, only one third of providers were taking advantage of reputation management software to solicit and collect positive reviews. Now, only one third of providers aren't taking advantage of reputation and recognition management!

Recruitment & Retention

Finding #2: A rise in care staff turnover stems from inefficiencies in the recruitment process.

In the long-term and post-acute care industry, R&R doesn't stand for rest and relaxation; instead, providers are still finding themselves caught in the revolving doors of recruitment and retention.

Over the last two years, the **home-based care turnover rate has increased by over 12% to reach a total of 79.2%**



KEY FINDINGS FROM THE 2024 REPORT



That's almost four in every five employees who will turnover within their first 100 days on the job.

And compared to home care and hospice, home health is having to consistently turn down new customers the most, due to a lack of employees. Which is a shame because customers turn over the least in home health with a 26.8% turnover rate, half of the rate in home-based care and hospice.

This industry-wide retention issue may begin with recruitment, as only 16.4% of home health and hospice nurses and 12.8% of home-based care applicants were hired. For home health and hospice, that's a 25% decrease in applicant to hire ratio compared to last year.

This may be because although Indeed continues to be the most popular recruitment source, it produces the highest turnover rate of 88%, ultimately producing a short-lived “quick win” for recruitment numbers but a devastating retention rate.

Because revenue per employee has increased by almost \$1,000 in the last year, the highest it's been in four years, using automated recruitment tools like Recruit would be a worthwhile investment to start hiring staff who stay.

Training

Finding #3: Professional training programs produce the highest ROI and cost the least in the long run.

As only 43.8% of home-based care staff and 55% home health and hospice staff feel completely prepared to take care of new clients, providers need to cater their training programs to their employees' needs.

While establishing a clear career path is one of the top strategies to retaining long-term employees, only 39.3% of providers have one.

Which is a shame because although in-person training initially costs the highest in employee acquisition expenses, **it produces the most revenue per care employee at \$17,071**. Proving training to be a benefit for employee retention, customer satisfaction, and revenue rates.

But it's not just your employees who benefit from quality training, customers reported highest satisfaction in the ability of their care staff. **83.1% of businesses now offer specialty training with 96.4% offering dementia training.**

With positive feedback like this, providers should start tracking hospital readmission rates to prove their quality care outcomes—a crucial industry KPI that only 24.1% of providers are doing.

Finally, the average home-based care employee receives five hours of orientation training and eight hours of ongoing. However, **adding just seven more hours of training per employee would increase your revenue by over a million dollars.**

See an increase of **\$1,103,291 in revenue** by offering at least eight orientation hours and 12 hours of ongoing training.

Finance

Finding #4: Although the industry's median revenue is the highest it's been in five years, a one-size-fits-all billing approach is limiting potential earnings—revealing an untapped market for additional growth.

Providers are doing better financially than they have been **\$292,723** for half a decade as **median revenue rose by \$292,723 in the last year, marking the largest annual increase in the past five years.**

This may be attributed to the 23% increase in weekly billable hours for hourly care in the last year which comprised 87.6% of all service offerings—making it imperative for providers to recruit and retain hourly care staff to keep up with the demand.

However, **revenue from hourly care is also the lowest it's been in the last three years, dropping by almost 10% in the last year.** Which may be why providers are also diversifying their top five payer sources: private pay, long-term insurance, Veteran Administration programs, Medicaid Waiver programs, and direct Medicaid billing.

To make up the difference, an untapped market lies in billing based on skill level needed as **61.6% of providers are billing solely on length of visit, while only 29% of providers are billing for duration combined with level of skill.**

Benchmarking your performance against the industry-standard outlined in this Benchmarking Report will help you uncover found-money opportunities like this and more.



KEY FINDINGS FROM THE 2024 REPORT

Operations

Finding #5: *Over half of all customers can be attributed to requests made by family members, but less than a third of care plans are meeting the family's goals for their loved one.*

In the long-term and post-acute care industry, reputation is everything.

That's because as only one in ten customers request their own long-term and post-acute care, over half of all business comes from family members requesting care for their loved ones. This is proving to be positive because the customer length of service increased by two

\$1,465 months and the **median customer lifetime value increased by \$1,465 in the last year, the highest it's been in the last four years.**

Providers who invested in enhancing the care experience to increase customer satisfaction, like through Activated Insights, saw three times the average customer lifetime value.

However, **although 94.9% of providers involve their customer's family in their care plan, only 26.7% completely met the family's care goals.** This may be why 15% of customers found themselves stopping services to look for another provider who could offer them a higher level of care.

As a result, the reputation of your company within the long-term and post-acute care market affects both your employees, customers, and their loved ones.

Ensure you're living up to your customers' and employees' expectations. Find out what else your customers and employees wish you would start, or stop, doing by conducting satisfaction surveys to become the company that employees recommend to their friends and customers recommend to their loved ones.

Customer & Employee Experience

Finding #6: *Providers who gather and act on employee and customer feedback recruited 90% more employees.*

Your dedication to providing quality care and employment is apparent, and it's paying off.

Net Promoter Scores® (NPS) and Employee Net Promoter Scores® (eNPS) are back to pre-pandemic satisfaction levels! **Customers are more satisfied than they have been in the last three years, while overall employee satisfaction is the highest it's been in five years.**

Lack of adequate training was a top complaint from both customers and employees for years. Which is why this year's highest satisfaction scores are worth celebrating over! Customers reported being most satisfied with their caregiver's ability, and likewise, employees are most satisfied with their customer/client's care plan matching.

The relationship between your customers and employees has never been stronger.

Unfortunately, both can attest to feeling the least satisfied in their relationship with their provider/employer.

In this year's report, customers admitted they're least satisfied with the level of communication they receive from their provider to the point where they would not recommend their provider to friends. Likewise, employees are least satisfied with the recognition they receive for their work.

Increase your credibility with referral sources by gaining a globally recognized and research-backed verification of a great employee experience. Great Place to Work Certification helps job seekers identify which companies genuinely offer the company culture everyone is talking about.

New Name, Same Focus:

Where 15 Years of Benchmarking Data Has Brought Us



Bud Meadows

Chief Executive Officer
Activated Insights



For the last 15 years, Home Care Pulse (HCP) has been evolving with the industry to better support long-term and post-acute care providers through better understanding and delivery of experiences. One of the ways we have done that is through our Annual HCP Benchmarking Report.

In 2023, we united the leading post-acute and long-term care technology companies to deliver mission critical applications and analytics to enable better care. These companies were aligned in a shared mission to help improve experiences for our customers, employees, and for the people in their care.

Now operating as a single entity, we are unifying under a single brand that demonstrates the breadth of our capabilities and aligns to each of the markets we serve in home care, home health, hospice, and senior living. Which is why it is my pleasure to announce that HCP will now be called **Activated Insights**.

As a result, the HCP Benchmarking Report will now be known as the *Activated Insights Benchmarking Report*!

Along with our unified name, this milestone Benchmarking Report brings dozens of new home-based data points such as staffing challenges, employee satisfaction and retention, and top business threats.

I'd like to personally extend my appreciation to you for not only supporting the Benchmarking Report, but for dedicating your time toward improving experiences and the quality of life for the people in your care.

We dedicate this milestone to you, and the thousands of providers like you, who have shared their data, strategies, and best practices over the years to make one of the largest reports in the industry possible.

Here's to many, many more milestones with you as we **make the most of every interaction.**

Bud Meadows
Chief Executive Officer, Activated Insights (formerly HCP)

ARTICLE

Looking Ahead:

Forging Our Path from 2024 to 2050

**Jason Lee**

Chief Executive Officer
**Home Care Association
of America**



“More data will help us better understand important trends and enhance our ability to tell the story of the value of home care.”

We are at a pivotal moment in our industry. The family to caregiver ratio is poised to drop from 7:1 today to 3:1 in 2050. Individuals over the age of 65 will grow from 56 million (2020) to 84 million in 2050, while those over the age of 85 will grow from 7 million (2020) to 19 million in 2050. Here at the Home Care Association of America (HCAOA), we are intensely focused on this key question—how will we address the widening chasm between diminishing family caregivers and an exponential increase in the older population, as well as the other demographics served by home care, as we approach 2050?

Part of the reason for this coming challenge is due to advances in modern medicine and a focus on healthier lifestyles, which as a result, have increased the average U.S. life expectancy dramatically. People are living longer than ever before. In fact, America will soon have more older people than young. By 2040, nearly 81 million people in the U.S. will be 65 years or older, compared with 77 million under the age of 18. We also know that someone turning 65 today has nearly a 70% chance of needing long-term care and support, likely for five or more years, and Baby Boomers want this type of care at home! A 2018 AARP survey showed that three out of four adults ages 50 and older want to stay in their own homes and communities as they age.



3 Step Plan to Advocate for In-Home Care

How can we respond to the staggering number of people who want to stay in their homes, particularly as we approach the year 2050?

Start by implementing these 3 strategies:

1. The answer is the professional caregiver. Millions of caregivers bring care and support into people's homes, by providing an additional set of eyes and ears to track changes in health conditions, detect potential safety hazards at home, and monitor basic needs like a healthy diet and regular medication management. The caregiver workforce shortage has reached crisis proportions in the U.S., and the steady growth of the U.S. senior population only exacerbates the current shortage. HCAOA is working with other industry leaders to invest in caregiver training and support, to develop a viable career path to attract more people to the caregiving profession, and to explore other avenues for workforce growth; including immigration reform that would provide an avenue for qualified foreign-born individuals while attracting more qualified workers to the industry.
2. Another key part of the solution to address today's needs and tomorrow's challenges is technology. Home care has always been a tech-forward industry, utilizing tools like remote patient monitoring, GPS-enabled caregiver support, and predictive scheduling. As with most industries, home care is grappling with what impact emerging technologies like artificial intelligence (AI) will have on how we manage our agencies, the patients and clients we serve, and the caregivers working in homes. AI can optimize the scheduling and routing of caregivers while providing data-driven decision-making that is agency-specific and aids in streamlining operations.

AI can also provide real-time insights and enable agencies and caregivers in the field to make informed decisions, leading to greater client and caregiver satisfaction.

3. The third piece of the puzzle is data with greater attention focused on the home care industry. Providers are developing methods to demonstrate and quantify the impact of home care. An overwhelming amount of studies show how hours of personal care delivered in people's homes can result in health care savings by reducing hospitalizations. Yet, there is sparse research on the overall impact of home care in this country's healthcare system. In 2024, HCAOA will reinstate our Data and Research Committee, with a main goal of leading the charge to rigorously collect and analyze real data to demonstrate the cost savings associated with home-based care. More data will help us better understand important trends and enhance our ability to tell the story of the value of home care. This message is critical to potential caregivers, to those we serve, and to the governments who can implement policies to both bolster the workforce and increase access to care.

HCAOA's Role in the Care Continuum

In the four years since the COVID-19 pandemic, HCAOA doubled its membership which reflects the greater emphasis and importance placed on providing care in the home and the clear preference of most individuals to receive care in the comfort of their own homes. Not only did the HCAOA membership grow as more and more home care providers realized there is strength in numbers, but the entire healthcare continuum also stood up and finally took notice of the value of care in the home, especially for older Americans at risk of worsening physical health and social isolation.

This critical growth gives us the foundation to prepare for the year 2050. In collaboration with our membership, we have strengthened our focus on building a robust workforce and providing data-driven, innovative, quality care and services at home for all, including children with complex medical conditions, people with disabilities, and, most especially, the growing population of older Americans. ■

Jason Lee
Chief Executive Officer, HCAOA

ABOUT THE AUTHOR

Jason Lee brings more than 20 years of experience in advocacy and nonprofit management. His background includes tenures as Chief of Staff and Senior Advisor to the President at the American Dental Education Association (ADEA) and Chief Advocacy and Strategy Officer at the Association of Fundraising Professionals (AFP). Lee holds a Juris Doctor degree from The George Washington University Law School, a Master of Arts in English Literature from Binghamton University, and a Bachelor of Arts in English Honors and Plan II Honors from The University of Texas at Austin.

Visit: www.hcaoa.org



Early Bird registration discount ends **August 9, 2024**. Register today and save \$150 on your registration!

THE CONFERENCE FOR HOME CARE LEADERS. HCAOA.ORG

Protecting Home Care Providers:

Advocating for Legislation Amidst Critical Workforce Shortage



Kristen Wheeler

Executive Director of Private Duty
**National Association for Home
Care & Hospice**



“Home care providers play a crucial role in delivering essential medical and personal care services to people in the comfort of their own homes.”

In the wake of the senseless murder of home care nurse Joyce Grayson in the course of her duties, the National Association for Home Care & Hospice (NAHC) fully supports legislation and regulatory measures aimed at ensuring the safety and protection of home care providers. This tragedy underscores the urgent need for comprehensive safeguards in an industry already grappling with a critical shortage of nurses, home care aides, and caregivers.

The shortage of qualified healthcare professionals, particularly in home care, has reached a critical level. As the population of older Americans continues to expand,

the demand for home-based healthcare services has surged. However, the supply of skilled and dedicated home care providers has not kept pace, leaving the industry stretched thin.

Home care providers play a crucial role in delivering essential medical and personal care services to people in the comfort of their own homes. The worker shortage places an immense burden on the existing workforce, leading to increased workloads, longer hours, and heightened stress levels for those on the front lines. In such an environment, risks to the safety of home care providers are amplified.

3 Steps to Address Industry Safety Concerns

Recognizing the urgency of addressing the safety concerns faced by home care providers, policymakers must advocate for legislative and regulatory actions that prioritize their protection. Comprehensive measures that encompass training, support systems, and legal safeguards to create a secure environment for those delivering care in private residences are just a start.

1. Enhanced [training programs](#) would equip home care providers with the skills and knowledge needed to navigate potentially challenging situations. This could include training in conflict resolution, de-escalation techniques, and self-defense where appropriate. Education is a key component in empowering home care providers to recognize and mitigate potential risks.
2. Robust support systems for home care providers would help address the emotional toll of their work. This involves access to counseling services, peer support networks, and regular check-ins to monitor their well-being. Recognizing the mental health challenges faced by those in the profession, these support systems aim to create a safety net for home care providers.
3. Potential legislation that explicitly addresses violence against home care providers should be considered. This includes stricter penalties for perpetrators, increased collaboration with law enforcement, and measures to ensure swift investigation and prosecution of crimes. Legal safeguards are essential to sending a strong message that violence against home care providers will not be tolerated.



“Projections foretell an imminent surge in demand, with the home care industry slated to create over **1.2 million jobs by 2028**, catapulting it into one of the nation’s fastest-growing sectors.”

Forecasted Projections for the Industry’s Top Challenges

Concerns over safety aren’t the only reason for worker shortages, however. Since 2020, the number of available aides has declined by a distressing 23 percent. This alarming trend, coupled with an annual turnover rate of more than half of these caregivers, paints a bleak picture, where care providers report reluctantly turning down a whopping 50 percent of care seekers.

Projections foretell an imminent surge in demand, with the home care industry slated to create over 1.2 million jobs by 2028, catapulting it into one of the nation’s fastest-growing sectors. However, this burgeoning demand starkly contrasts with the acute shortage of skilled professionals within the field, a challenge that requires immediate and sustained attention.

NAHC’s ongoing partnership with MissionCare Collective took a significant stride forward in 2023 with the release of “[One Voice, Many Stories](#),” which delved deeper into the lives of home care workers, featuring

candid interviews and a new report that provides poignant insights into the experiences and challenges faced by those on the front lines of home care.

Congress can address this crisis by prioritizing measures ensuring the availability of home care personnel, particularly in underserved areas, revisiting Medicaid reimbursement rates, and considering bills that support incentives and support for home care business owners that foster innovation and diversity in services. Reevaluating and streamlining immigration policies that facilitate the entry of qualified nurses, home care aides, and caregivers also remains paramount.

Moreover, acknowledging the monumental contribution of family caregivers, often overlooked, remains pivotal. Acts such as the *Credit for Caring Act* propose tax credits for expenses incurred by family caregivers, recognizing their significant contributions to the care ecosystem.



The Comprehensive Approach to Care

In the ever-changing landscape of care, the pressing issue of a workforce deficit demands collective attention and action. As the shortage of nurses, home care aides, and caregivers in home care intensifies, the need for comprehensive protective measures has come to the forefront. This shortage not only jeopardizes the quality of care individuals receive in the comfort of their homes but also underscores the importance of safeguarding the well-being of home care providers.

As the home care industry grapples with workforce challenges, addressing safety concerns emerges not only as a moral imperative but also as a strategic necessity. Implementing protective measures is essential not just to uphold the well-being of care providers but also to [attract and retain skilled professionals](#) in the field of home care. Ultimately, ensuring the safety of those on the frontline becomes an integral part of the broader mission to provide individuals with the comprehensive care they need and deserve in the familiar and comforting environment of their homes. 📌

Kristen Wheeler
Executive Director of Private Duty, NAHC

ABOUT THE AUTHOR

In the healthcare industry since 1990, Kristen Wheeler is now the Executive Director of Private Duty at the National Association for Home Care and Hospice (NAHC). Her journey into private duty home care commenced in 2004 when she was tasked with establishing a private duty program for a Medicare-certified home care and hospice agency. Recognizing the need for private duty home care to operate autonomously, Kristen co-founded and co-owned an independent private duty agency for several years before transitioning into the realm of professional associations.

During her tenure at the Home Care Association of Florida (HCAF), which spanned nearly six years, Kristen played a pivotal role in the cultivation of a thriving, specialized private duty membership within the organization. In early 2022, Kristen embarked on a new chapter in her career by joining the esteemed team at NAHC.

Currently residing in Savannah, Georgia, Kristen shares her life with her husband and a very pampered feline companion.

Visit: www.nahc.org

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“Dynamic, Innovative, Inspiring! The conference provided excellent networking opportunities. All sessions were very informative. More importantly, I can apply what I learned immediately to my business. It's an honor and privilege to support an organization that is a voice for the home health and hospice industry.”

– Manjeet Kaur, Amedisys, Inc.,
Vice President Regulatory
Affairs & Clinical Risk

Registration now open.
nahc.org/NAHC2024



SUMMARY

Sales & Marketing

The Sales & Marketing section dissects the variety of strategies and channels currently being used by post-acute care businesses to help you evaluate the best approach for your own organization. This section encompasses data about customer and employee acquisition and retention, including the top channels for consumer and referral marketing, conversion rates, and acquisition costs. These findings will help you determine whether your sales and marketing programs measure up to other businesses within your region and revenue range.



Section Contents

- 22** Marketing Sources
- 26** Inquiry Tracking
- 28** Median Sales Close Ratios & Numbers
- 30** Annual Number of Inquiries
- 31** Growth Opportunities
- 32** Top Threats
- 33** Customer Growth Rates
- 35** Customer Acquisition Costs

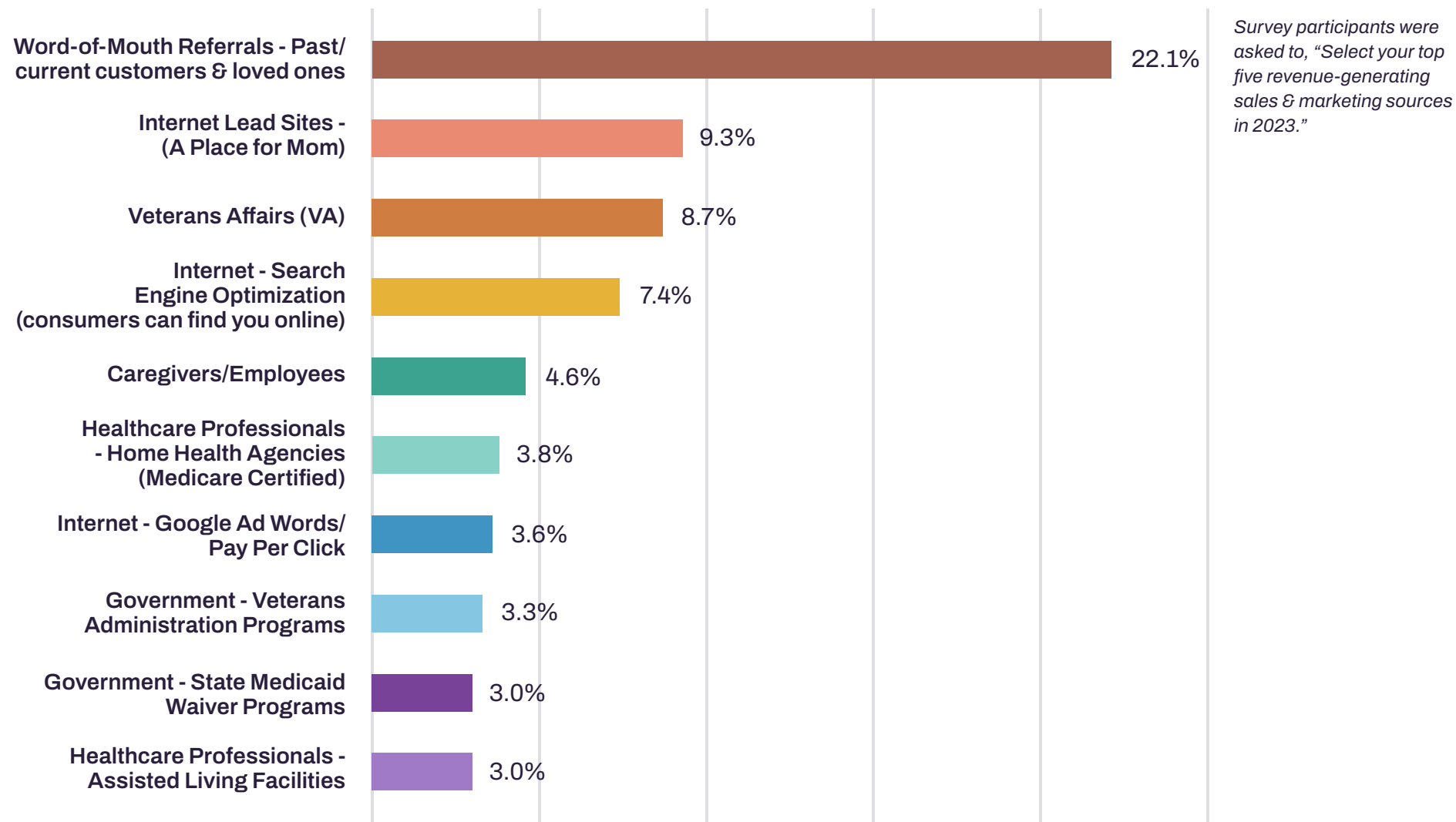
ARTICLES

- 38** *How to Leverage Consumer-Driven Data Points to Increase Your Digital Advertising ROI*
- 41** *15 Ways Online Reviews Boost Sales & Marketing*



MARKETING SOURCES

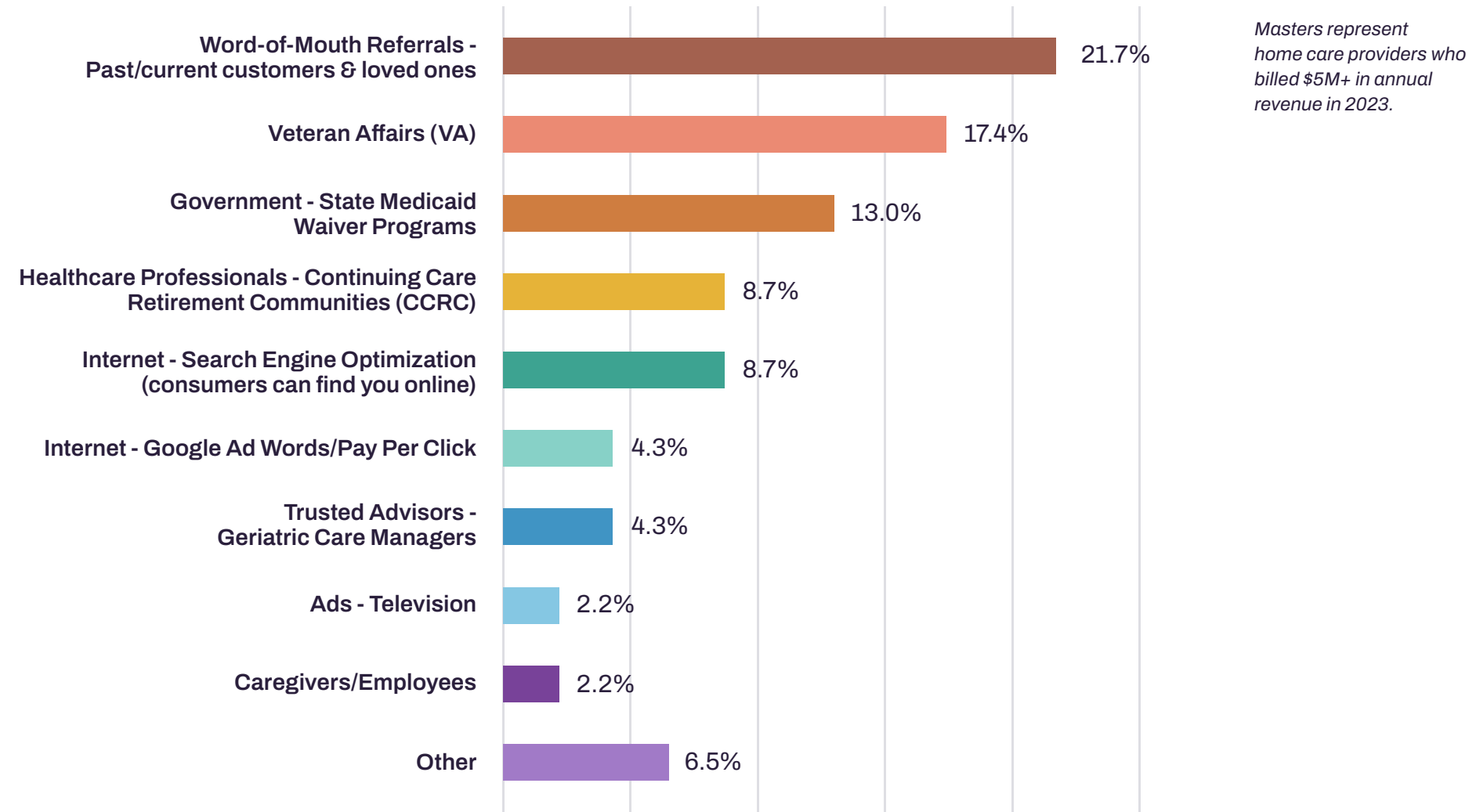
1.1 Home Care 2023 Top 10 Marketing Sources





MARKETING SOURCES

1.2 **Home Care** 2023 Top 10 Marketing Sources - Percent of Participants' Top Source - **Masters**





MARKETING SOURCES

1.3 Home Care 2023 Top 20 Marketing Sources

Source	% of Participants	Median % of 2023 Revenue*	Median Revenue**	Median Customer Acquisition Costs**	Inquiry-to-Admission Ratio**
Overall Home Care Industry - 2023	—	—	\$2,009,771	\$800	30.2%
Word-of-Mouth Referrals - Past/current customers & loved ones	19.7%	81.02%	\$2,009,771	\$787	31.7%
Internet - Search Engine Optimization (consumers can find you online)	6.5%	32.85%	\$2,162,940	\$688	27.7%
Care Professionals/Employees	5.5%	16.06%	\$1,648,194	\$881	33.3%
Veterans Affairs (VA)	5.0%	25.18%	\$2,300,000	\$777	30.6%
Internet - Google Ad Words/Pay Per Click	4.8%	21.53%	\$2,119,523	\$968	26.0%
Healthcare Professionals - Hospital Discharge Planners	4.5%	20.44%	\$3,331,750	\$1,109	28.1%
Internet Lead Sites - A Place for Mom	4.3%	20.07%	\$1,250,000	\$693	17.8%
Healthcare Professionals - Hospices	3.9%	20.80%	\$1,900,000	\$740	33.3%
Healthcare Professionals - Home Health Agencies (Medicare Certified)	3.7%	16.06%	\$2,286,678	\$758	33.8%
Healthcare Professionals - Assisted Living Facilities	3.7%	16.79%	\$1,989,000	\$1,079	34.4%
Internet - Corporate Web Leads (e.g. Franchisors Website, etc.)	2.7%	12.77%	\$2,119,523	Survey participants were asked, "Select your top five revenue-generating marketing sources in 2023. Then select the percentage of 2023 annual revenue for which each top method was responsible." * Median Percent of 2023 Revenue shown here represents the percentage of revenue that came from a given source. ** These data points represent the median revenue, customer acquisition costs, and inquiry-to-admission ratio for agencies who listed each given source as a top revenue-generating source.	
Competitors	2.3%	9.85%	\$1,263,000		
Healthcare Professionals - Skilled Nursing Facilities	2.3%	10.22%	\$2,069,593		
Healthcare Professionals - Independent Living Facilities	2.2%	12.04%	\$2,450,000		
Government - Veterans Administration Programs	2.0%	7.30%	\$2,059,762		
Healthcare Professionals - Rehabilitation Hospitals (inpatient)	1.9%	8.39%	\$2,111,000		
Trusted Advisors - Geriatric Care Managers	1.8%	8.76%	\$2,707,500		
Government - State Medicaid Waiver Programs	1.7%	7.66%	\$3,500,000		
Internet Lead Sites - Caring.com	1.7%	7.30%	\$1,197,400		
Other	4.1%	17.52%	\$2,077,909		



MARKETING SOURCES

Other Marketing Sources

This list provides some additional and lesser-known sources of new home care customers that you may like to review. The sources listed in red were mentioned in this year's survey. **Options submitted under “Other” for the 2023 survey are highlighted in red.**

ADVERTISING

- Ads - Church Bulletins
- Billboards
- Brochures (local restaurants, mailbox drops)
- **Direct Mail**
- Local Newspaper/Magazines
- Mailers
- **Office Sign/Walk-ins**
- **Radio/Local Radio Advertising**
- Senior Directories
- Television
- **Wrapped Vehicle**

COMMUNITY RESOURCES

- Adult Day Care
- Church Bulletin
- **County-level Respite Program**
- Exhibiting at Health Fairs
- Indigenous Tribes
- Information & Referral/ Assistance (I&R)
- Jewish Social Service Community
- Local Alzheimer's Support
- Local Church
- Local Senior Center
- **MSSP Programs/Foundation**
- **Networking Group Member**

Networking in Local Business Community

- **Non-Profits**
- Support Group Participation
- Transportation Center

CONSUMER EVENTS

- Exhibiting at Health Fairs
- Participating in Support Groups
- Public Speaking at Churches, Senior Centers, etc.

HEALTHCARE

PROFESSIONALS

- ALCA (Aging Life Care Assn) Certified Care Managers
- ALS Association
- Auto Case Managers
- Care Managers
- **Developmentally Disabled Community**
- Doctor's Offices
- **Elder Care Placement Agency**
- Hospice
- Hospitals
- Hospital Discharge Offices
- Independent Physical/ Occupational Therapists
- Intellectual or Developmental Disability (IDD) Services

Johns Hopkins Health System

- Long-Term Care Insurance
- Medicaid MCO Case Managers
- **Networking Groups (Senior Niche groups, Referral Partners)**
- Nursing Center
- Other Case Managers
- **Palliative Care Provider**
- **Parent Hospital**
- Parish Nurse
- **Placement Agency**
- Physician Offices
- **Power Partners**
- Rehabilitation Centers (Outpatient)
- Rehabilitation Hospitals (Inpatient)
- Skilled Nursing Facilities
- Workers' Compensation Case Managers

INTERNET

- **Care.com**
- CareAvailability.com
- Caringforasenior.com
- CareInHomes.com
- Carepathways.com
- Google My Business
- **Indeed**

- LinkedIn
- NextDoor: Online Word-of-Mouth
- NextDoor Recommendations (not ads)
- Paid Banner Ads on Other Websites
- 5 Star Reviews
- Trusted Hands Network
- Website
- **Website (no SEO)**
- **Yelp**

OTHER

- **Aid & Attendance Pension**
- ARC-Respite Program
- **Business Group**
- Competitors
- **Contract such as SCAN Health Plan**
- Corporate
- Employees
- **Hire Family Caregiver**
- **Managed Long Term Care Plans**
- Neighboring Franchise Offices
- **Networking**
- **Other Franchises or Franchisor**
- Personal Family & Friends Network
- Private Customers

- Rackcard Holders
- **Retail/Fast Food**
- SCAN
- Senior Placement Agencies

STATE SERVICES

- PACE
- Social Service Organizations
- State Service Coordinator
- Workers' Comp Case Managers

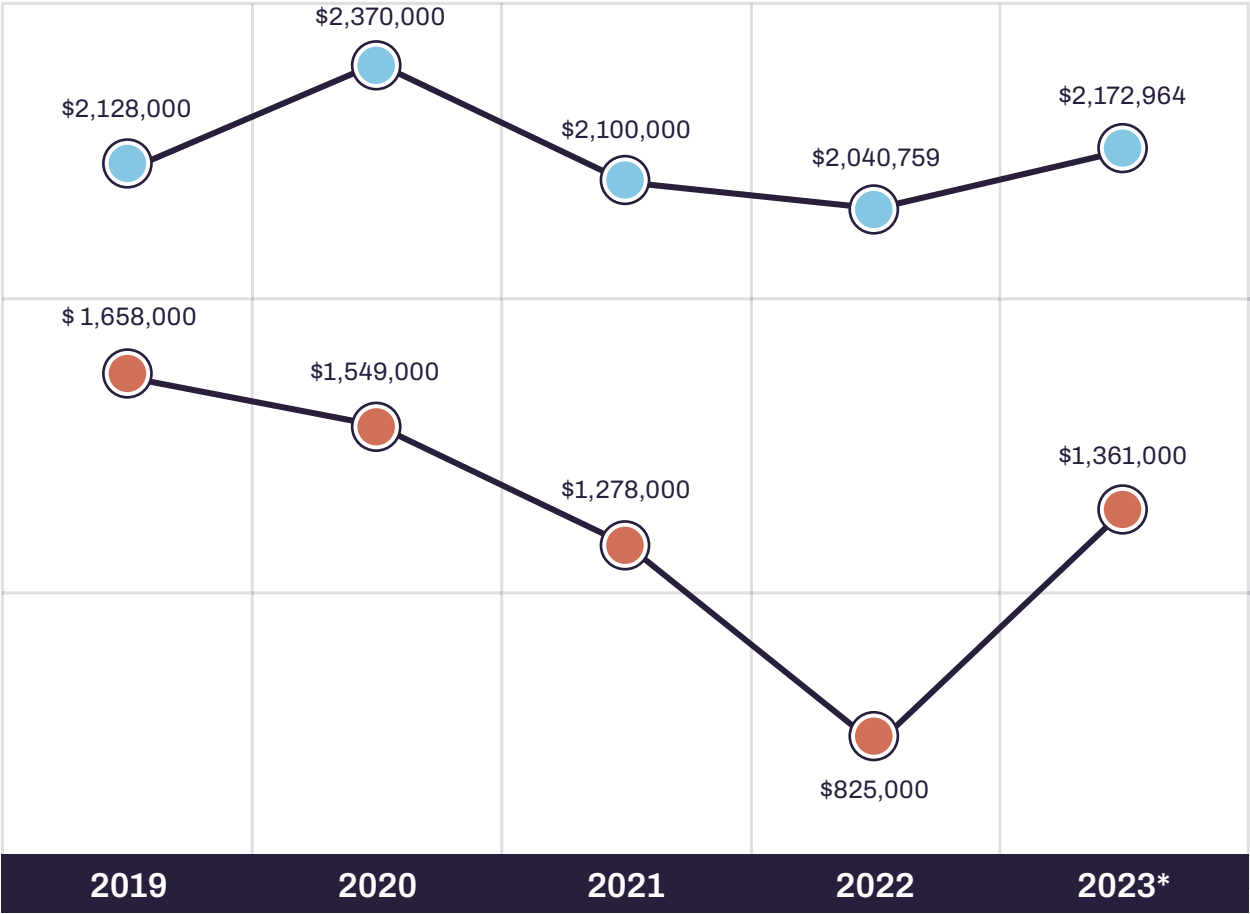
TRUSTED ADVISORS

- Bank Trust Officers
- Certified Senior Advisors (CSA's)
- Clergy
- **Elder Law Attorney**
- **Estate Planning Attorneys**
- Financial Managers & Legal Advisors
- Geriatric Care Managers
- Guardians/Conservators
- **Insurance Agents/Companies**
- **LTCI Companies**



INQUIRY TRACKING

1.4 Home Care Historical Inquiry Tracking Comparison - Median Revenue



- Track Every Inquiry
- Do Not Track Every Inquiry

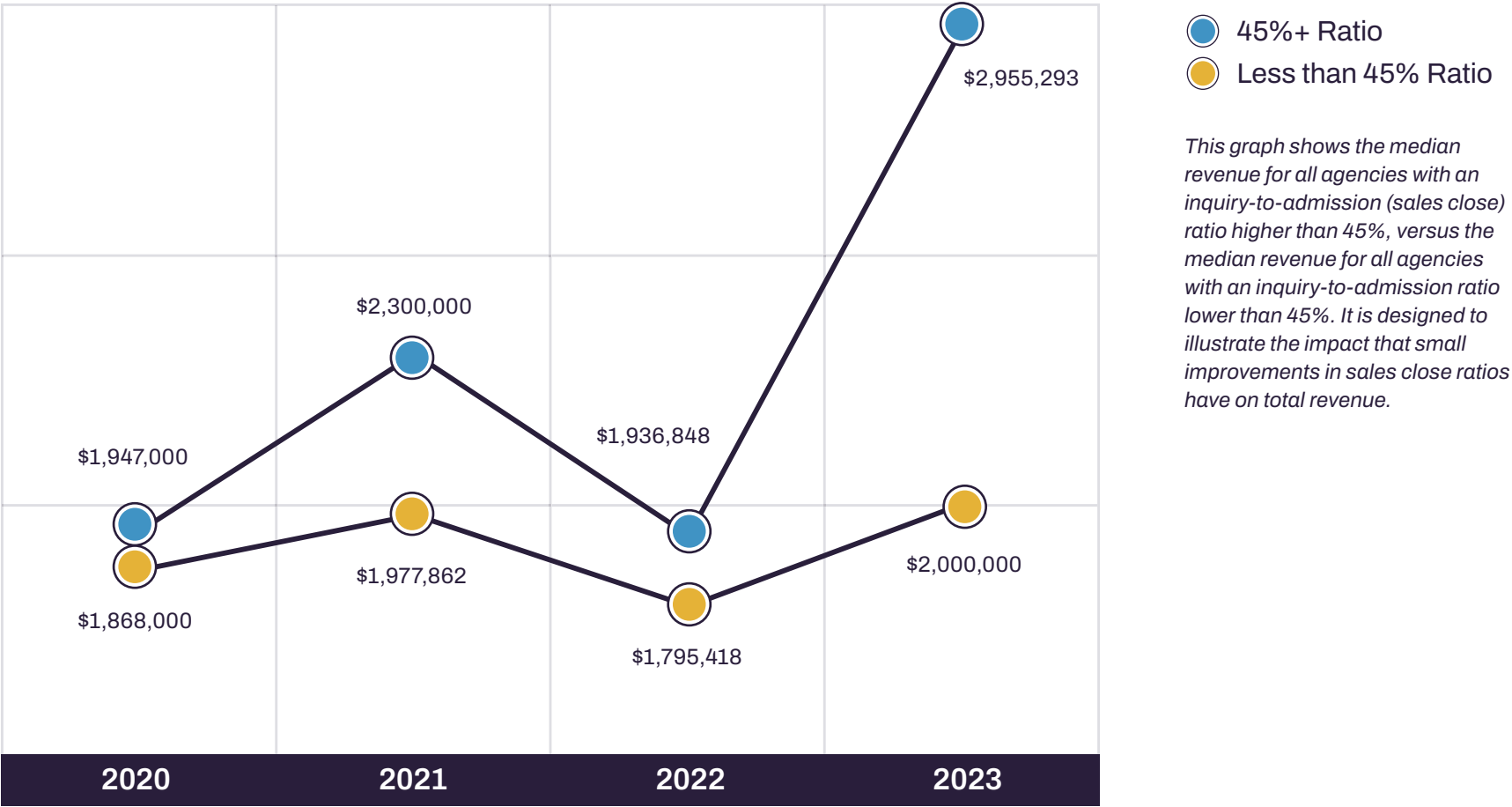
This graph shows the median revenue for those providers who track every inquiry about services versus those providers who do not track every inquiry about services.

*Previous years' data appears differently than in prior reports due to the inclusion of more accurately segmented historical data in this year's report.



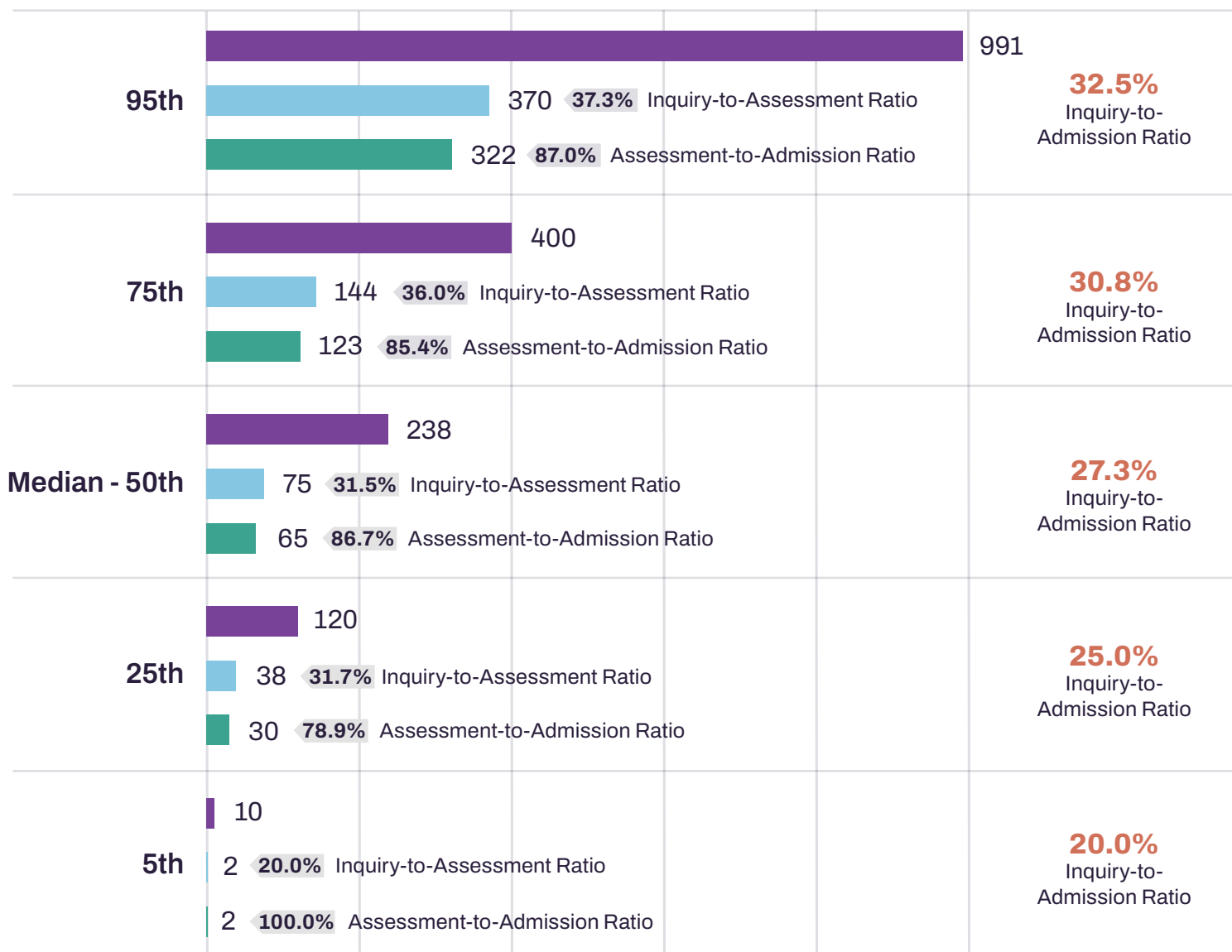
INQUIRY TRACKING

1.5 **Home Care** Historical High vs Low Inquiry-to-Admission Ratio - Median Revenue





MEDIAN SALES CLOSE RATIOS & NUMBERS

1.6 **Home Care** Median Sales Conversions for 2023 - Percentile Ranking

- Annual Inquiries
- Annual Assessments
- Annual Admissions

Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

See next page for ratio definitions.

Inquiries – Individuals who called in for services and provided some kind of contact information, such as a phone number, address, and/or email.

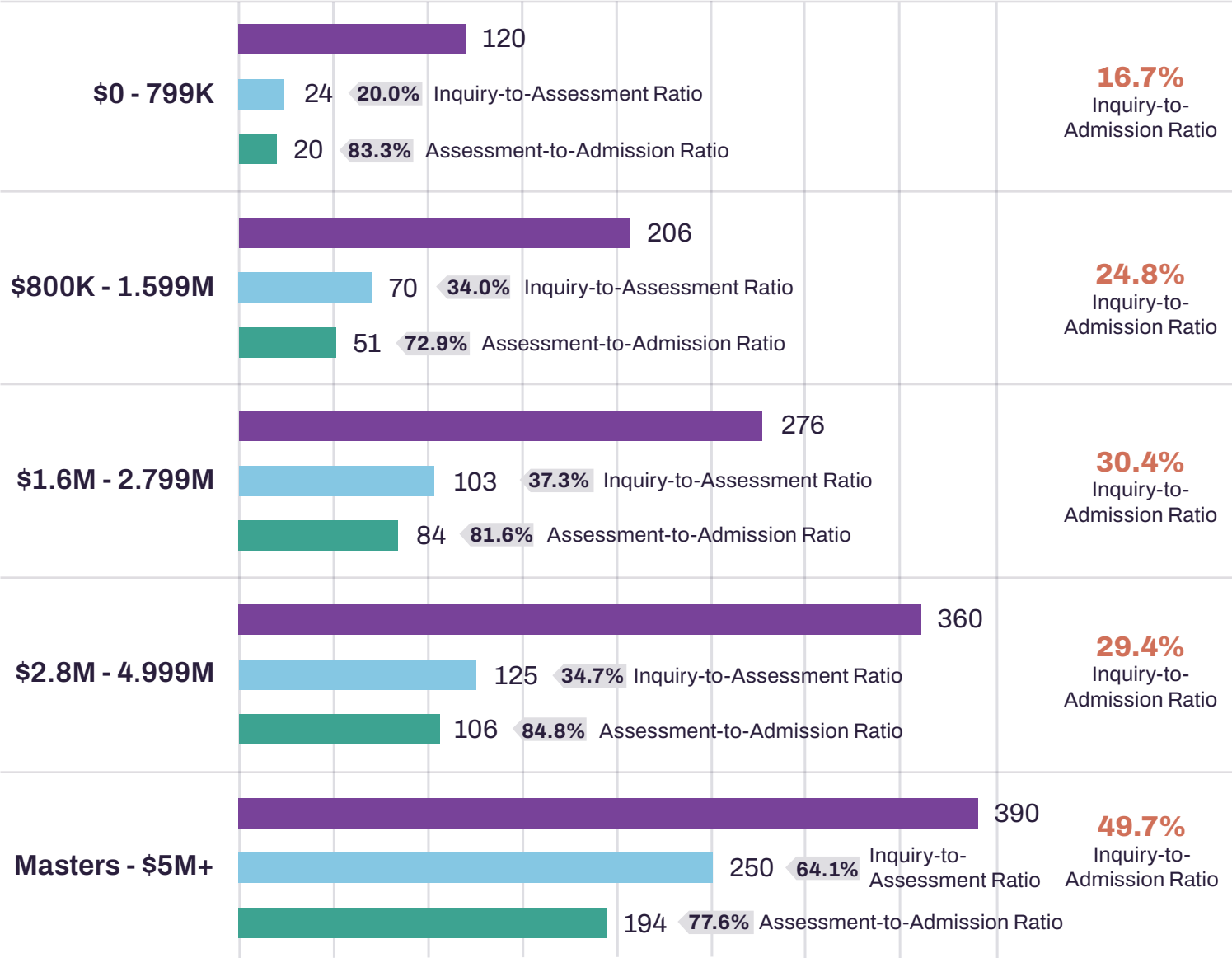
Assessments – Formal meetings to discuss the needs of the potential customer and the business's capabilities in meeting those needs.

Admissions – New customers who started services.



MEDIAN SALES CLOSE RATIOS & NUMBERS

1.7 **Home Care** Median Sales Conversions for 2023 - Revenue Ranges



- Annual Inquiries
- Annual Assessments
- Annual Admissions

Inquiry-to-Assessment Close Ratio – The percentage of prospective inquiry calls that turn into a performed assessment. (This number is found by dividing the number of performed assessments by the number of inquiries.)

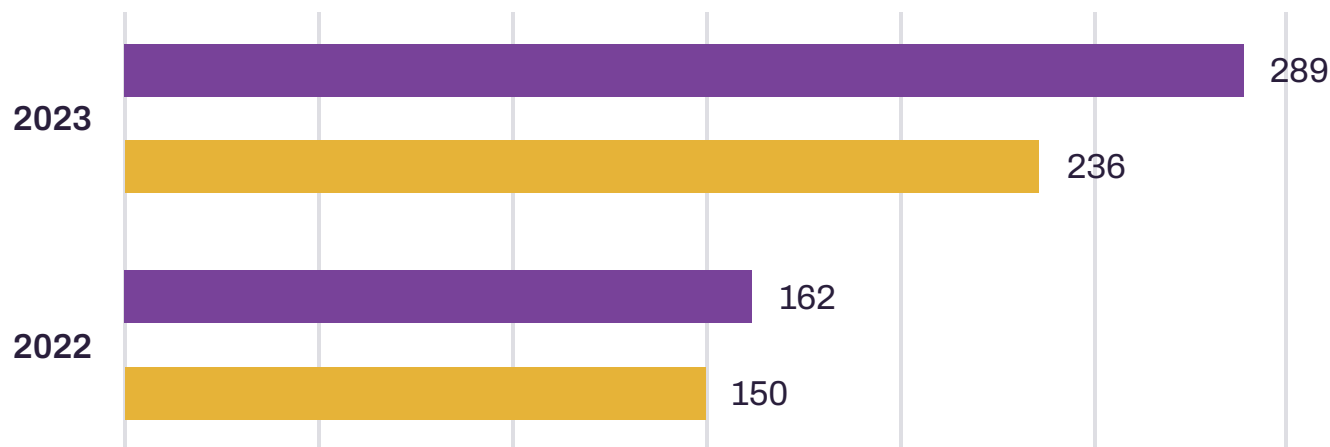
Assessment-to-Admission Close Ratio – The percentage of performed assessments that became actual customers. (This number is found by dividing the number of admissions by the number of performed assessments.)

Inquiry-to-Admission Close Ratio – The percentage of service inquiries that became actual customers. (This number is found by dividing the number of admissions by the number of inquiries.)



ANNUAL NUMBER OF INQUIRIES

1.8 Overall Annual Number of Inquiries - Businesses Using Activated Insights Products



- Use Activated Insights Products
- Do Not Use Activated Insights Products

Activated Insights equips businesses with valuable tools to help them improve both customer and employee satisfaction, manage their online reputation, and provide employees with training to deliver the highest quality care.

To learn more about how Activated Insights can help your business grow, visit us at activatedinsights.com or contact us at (877) 307-8537.

Understanding the Data

While there are many ways to interpret this data, at least part of the gap shown here is due to the ways that Activated Insights can help generate more inquiries. Businesses using Activated Insights have the tools to help them efficiently manage their online reputation. Additionally, platform users are encouraged to utilize their customer and employee satisfaction scores in meetings with referral partners. Those that do so often report that this provides a clear competitive edge in securing partnerships.

Explaining the Gap

Businesses using Activated Insights are using their results as proof of quality care to attract and earn more business and enhance their reputation, including more and better online reviews, more word-of-mouth from loyal customers, and increased interest due to recognitions and awards like Great Place to Work and Best of Home Care.



GROWTH OPPORTUNITIES

1.9 Home Care Top 5 Growth Opportunities for 2024

Rank	Top Growth Opportunities	Percentage	Change from Previous Year
1	Strengthening relationships with referral sources	33.1%	▲ 6.3%
2	Care professional recruitment and retention program	18.3%	▼ 14.6%
3	Company expansion into a new market(s)	10.0%	▲ 3.5%
4	Strategic partnerships with continuum of care related companies	6.4%	▲ 1.8%
5	Increasing customer referrals by improving customer satisfaction	5.0%	▼ 1.5%

Survey participants were asked, “What do you see as your number one growth opportunity in 2024?”

GROWTH OPPORTUNITIES

1.10 Home Health Hospice Top 5 Growth Opportunities for 2024

Rank	Top Growth Opportunities	Percentage	Change from Previous Year
1	New Referral Sources	22.1%	N/A*
2	Strengthening Relationships	16.8%	▲ 1.9%
3	Recruitment/Retention	15.9%	▼ 5.7%
4	Client/Family Referrals	11.5%	N/A*
5	New Partnerships	9.7%	▼ 0.4%

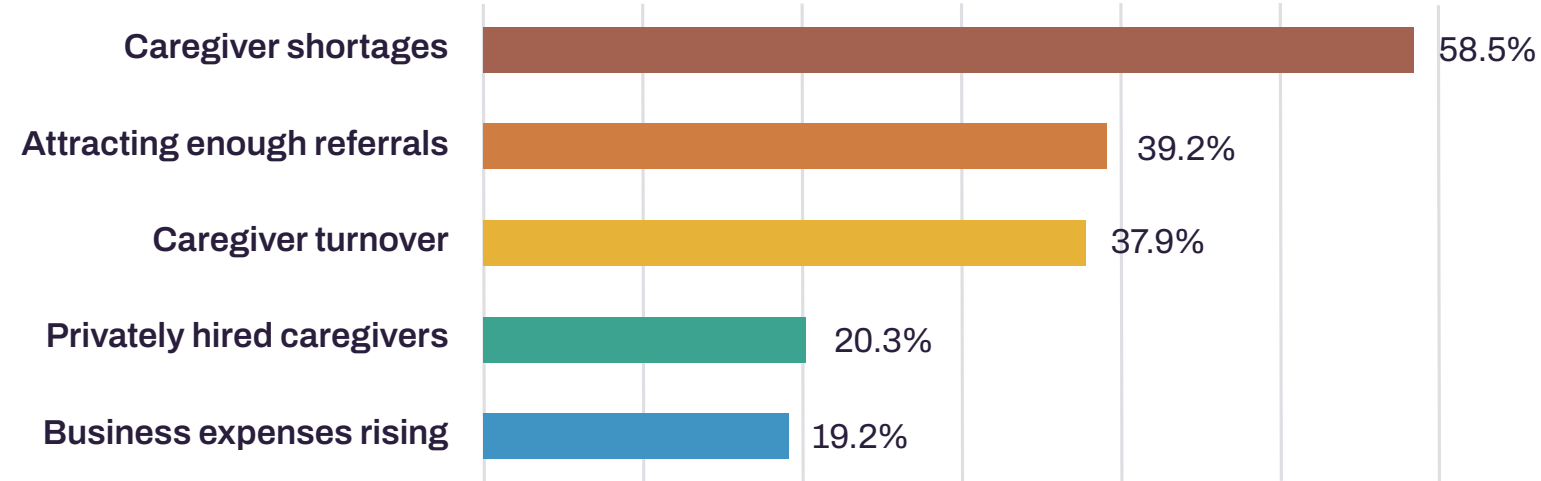
Survey participants were asked, “What do you see as your #1 growth opportunity in 2024 for your home health/hospice line of business?”

*Category didn’t rank in the top 5 in 2023.



TOP THREATS

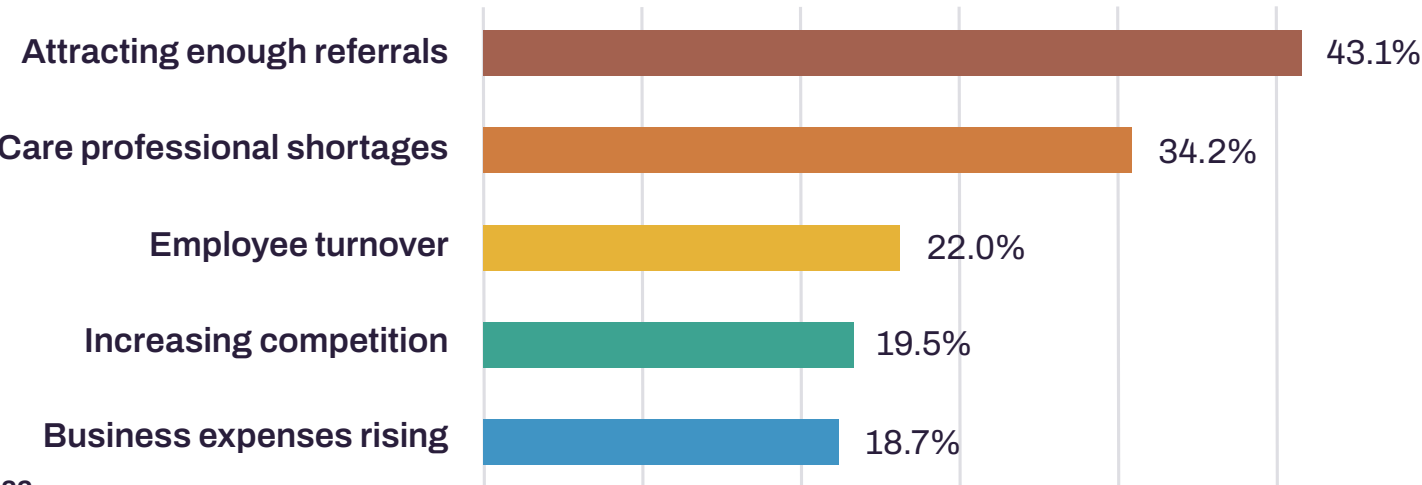
1.11 **Home Care** Top 5 Threats Facing Home Care Providers in 2024



Survey participants were asked, "What do you see as your top three threats to the future growth of your business in 2024?"

TOP THREATS

1.12 **Home Health Hospice** Top 5 Threats Facing Home Health & Hospice Providers in 2024

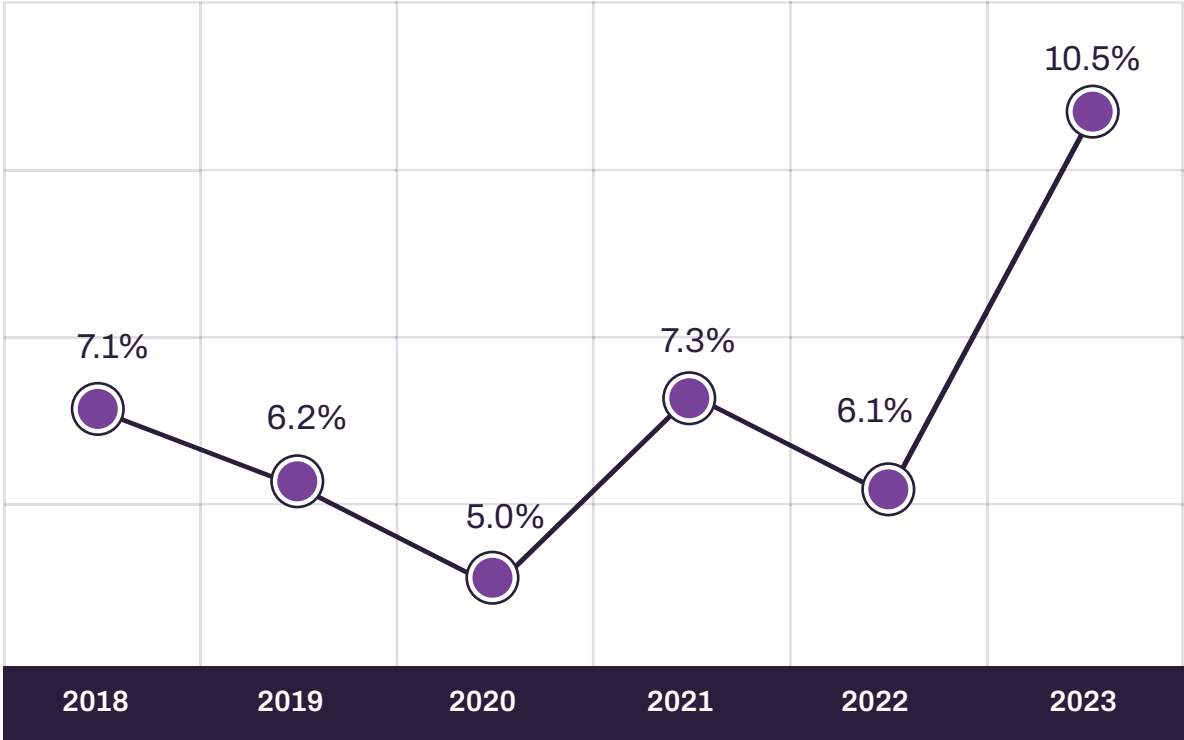


Survey participants were asked, "What do you see as your top three threats to the future growth of your business in 2024?"



CUSTOMER GROWTH RATES

1.13 **Home Care** Historical Median Customer Growth Rates



Customer Growth Rates are median growth rates from December 31, 2022 to December 31, 2023. It is important to understand that the smaller the agency, the easier it is to increase the percentage of customer growth. For example, if an agency has 20 customers and grows to 30 in a year, they have achieved a 50% customer growth rate. However, if an agency has 200 customers and grows to 210 customers (*adding the same number of customers as the smaller agency*) their growth rate is just 5%.

CUSTOMER GROWTH RATES

1.14 **Home Health** **Hospice** Median Customer Growth Rate for 2023

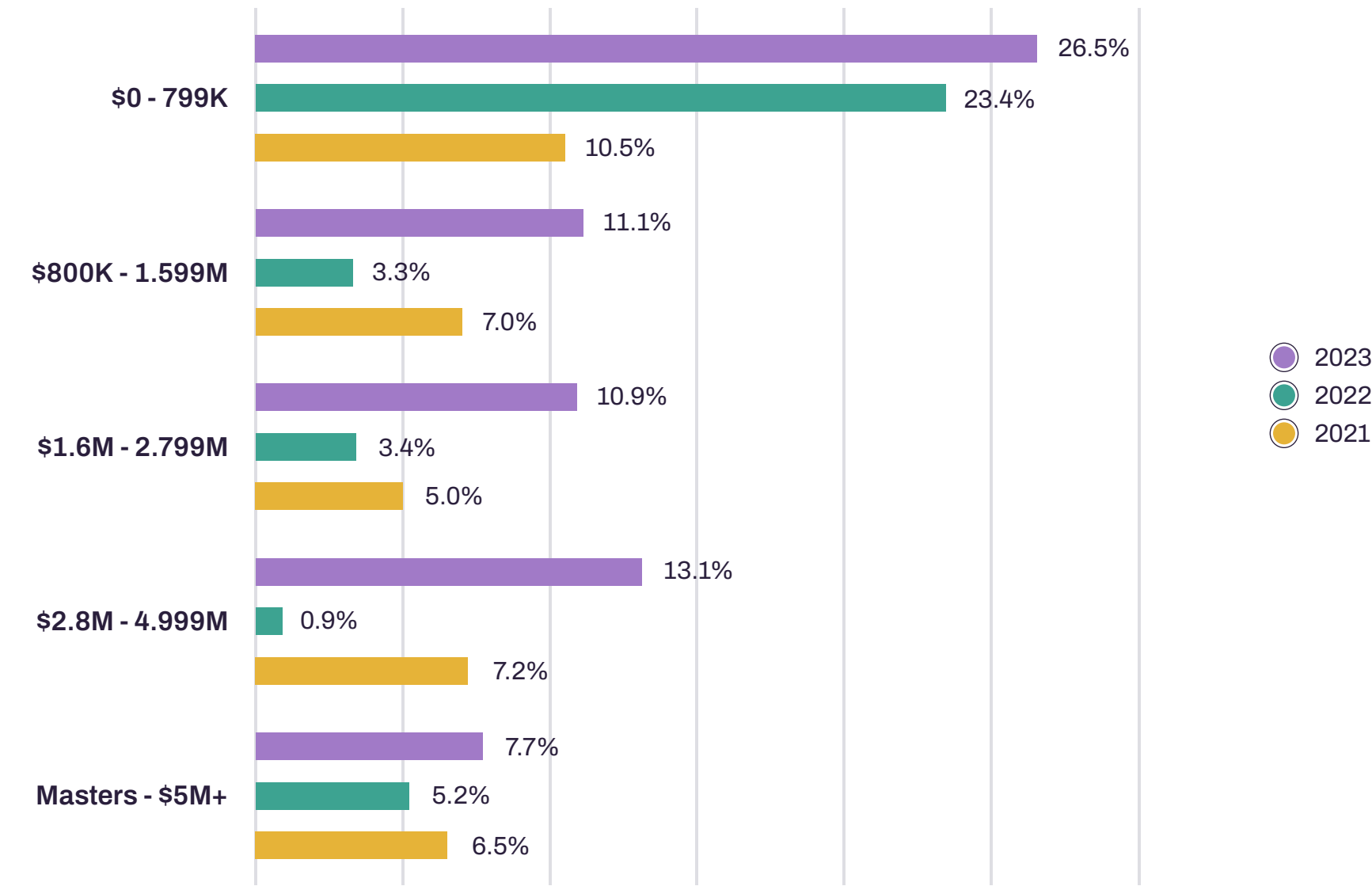
2023 Median Customer Growth Rate

12.2% ↑



CUSTOMER GROWTH RATES

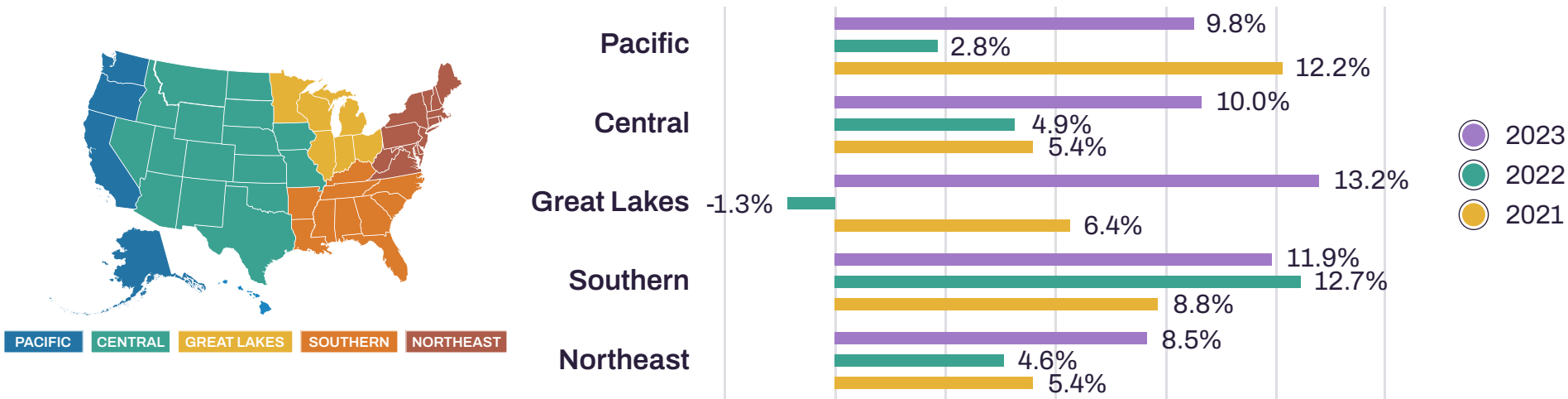
1.15 **Home Care** Historical Customer Growth Rates - Revenue Ranges





CUSTOMER GROWTH RATES

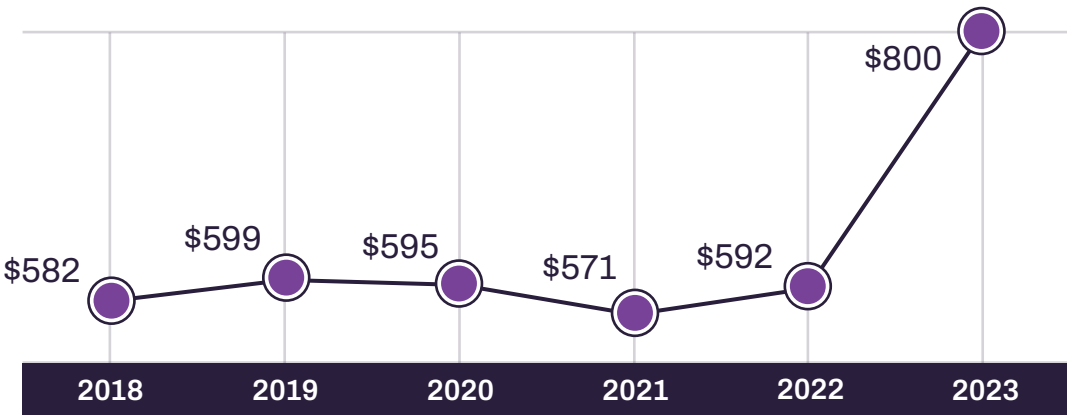
1.16 Home Care Historical Customer Growth Rates - Geographic Region



CUSTOMER ACQUISITION COSTS

Median Customer Acquisition Costs displays the cost of acquiring new customers in 2023. To calculate your customer acquisition costs, add up your total sales and marketing expenses (including salaries and commissions associated with sales and marketing). Then, divide this total dollar amount by the number of new customers (admissions) you began servicing the same year. When considering different sales and marketing strategies, it is important to consider the impact these strategies will have on your average acquisition costs compared to this benchmark.

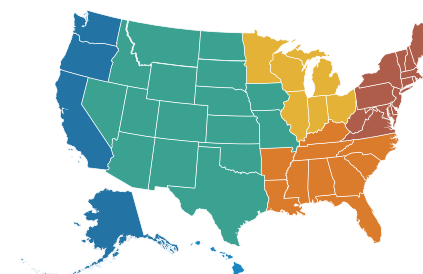
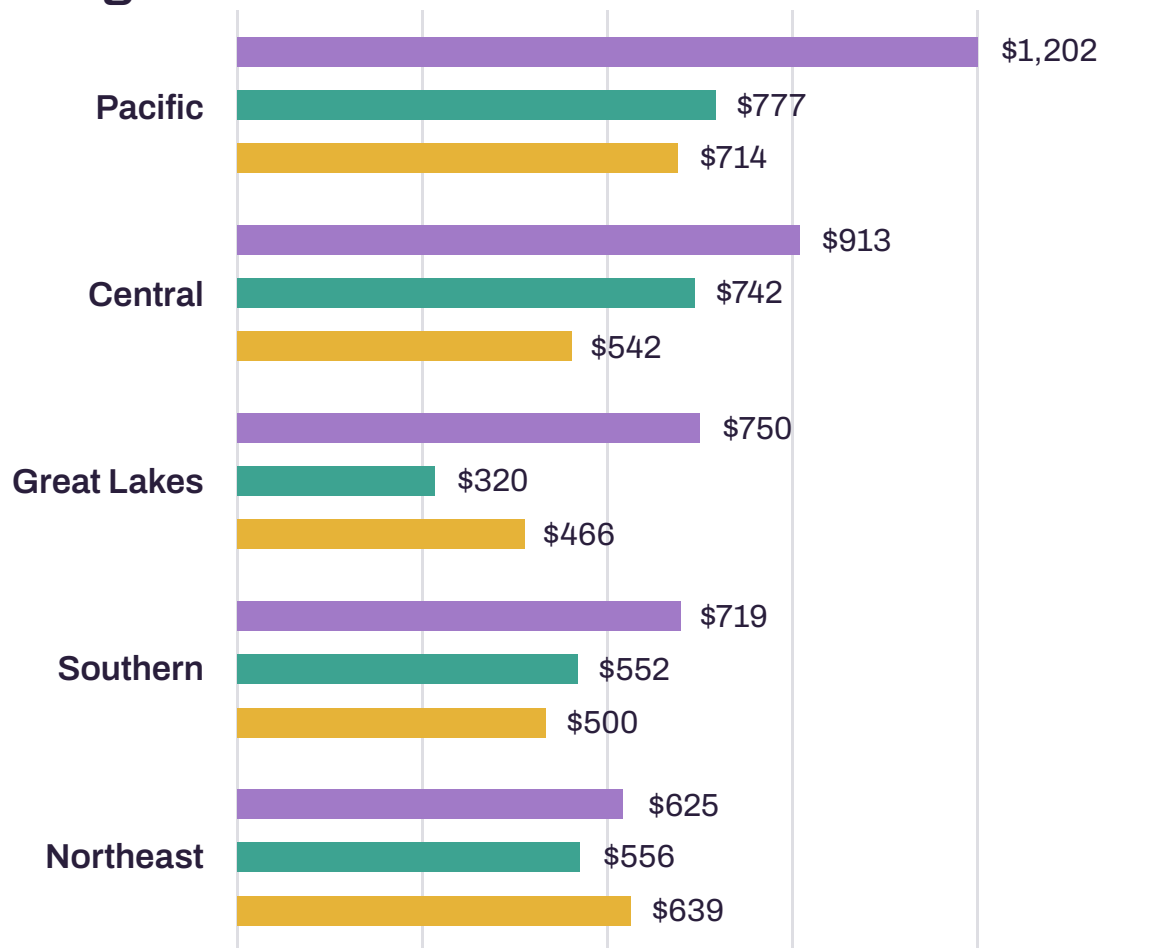
1.17 Home Care Historical Median Customer Acquisition Costs





CUSTOMER ACQUISITION COSTS

1.18 **Home Care** Historical Median Customer Acquisition Costs - Geographic Region



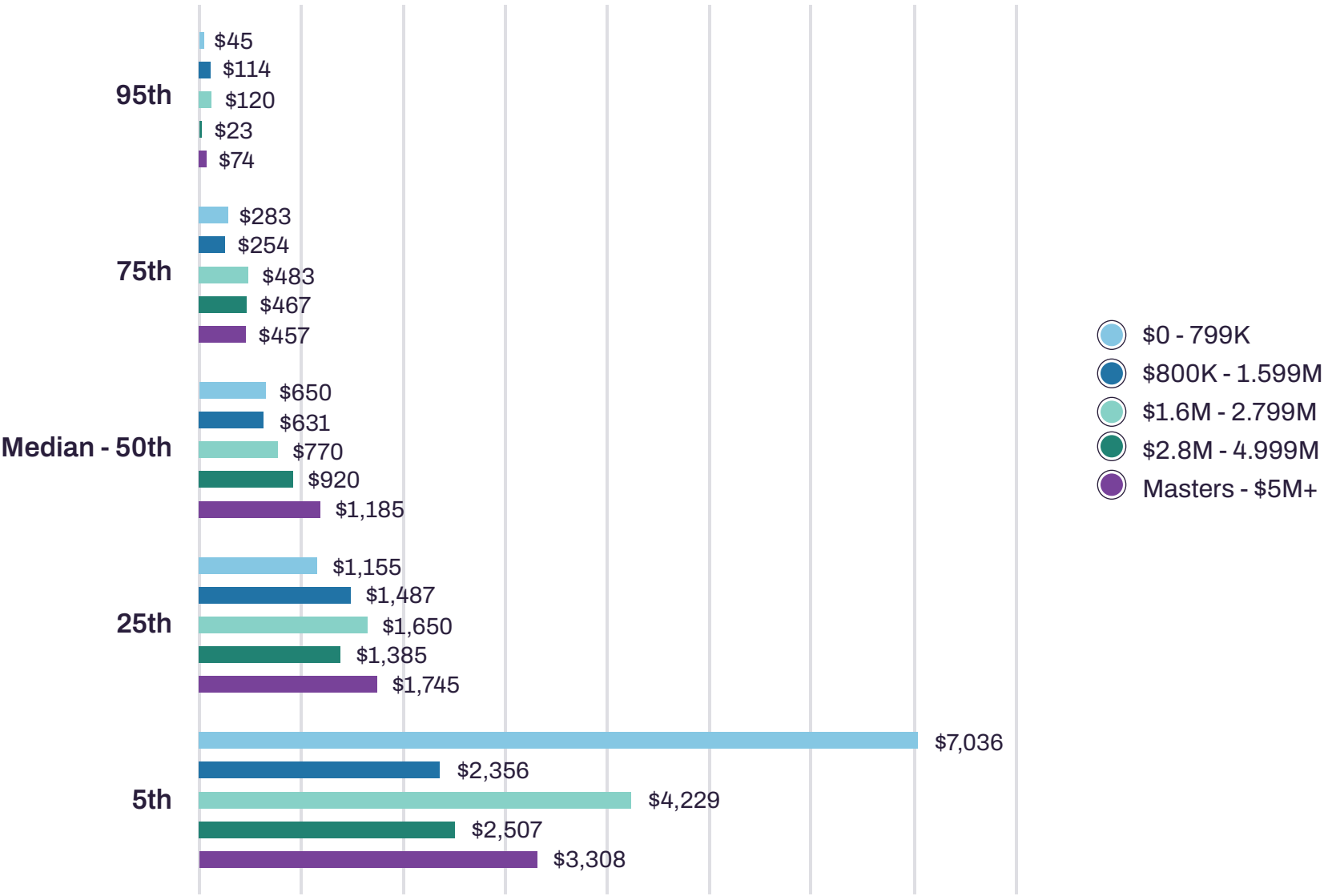
PACIFIC CENTRAL GREAT LAKES SOUTHERN NORTHEAST

Note: The significant increase in Median Customer Acquisition Costs for the Pacific region may be contributing to the increase in cost for 2023.



CUSTOMER ACQUISITION COSTS

1.19 **Home Care** Customer Acquisition Costs for 2023 - Revenue Ranges



How to Leverage Consumer-Driven Data Points to Increase Your Digital Advertising ROI



Marissa Snook

President/CEO
corecubed

corecubed
Care Marketing Solutions

“While the prospect of diving into data may seem daunting, it is essential for refining and maximizing advertising strategies.”

Digital advertising is an essential tool for today’s care marketers, and achieving sustained success requires a data-driven approach.

According to a [McKinsey & Company survey](#):

Data-driven companies are:

- 23 times more likely to outperform competitors in customer acquisition
- 19 times more likely to have above-average profits
- 2.6 times more likely to see a higher ROI

Leveraging consumer-driven data points is vital for care companies seeking to optimize the return on their digital advertising investment (ROI).

Understanding the Strategic Importance of Data

Care marketers must understand that digital advertising success is not achieved through implementation alone. Instead, success can only be achieved through continuous refinement of digital advertising efforts using data insights. For care companies, embracing the strategic significance of data is paramount to growth. While the prospect of diving into data may seem daunting, it is essential for refining and maximizing advertising strategies.



Understanding consumer behavior is the cornerstone of effective digital marketing, and this knowledge is best gleaned from analyzing data. Attention to reviews and satisfaction feedback offers invaluable guidance on customer expectations. Additionally, delving into digital advertising analytics reveals crucial details such as campaign performance, engagement metrics, and the impact of specific marketing initiatives on conversions.

Furthermore, keeping a pulse on competitor advertising provides valuable benchmarks and inspiration for refining strategies. By harnessing consumer insights and advertising performance metrics, care companies can craft targeted campaigns that resonate deeply with their audience segments, driving higher engagement and conversions.

Researching and Understanding Care Consumer Behavior

To reach your target audience (and achieve desired results), you must first understand who they are and how they act as consumers. Consumer research allows care companies to identify care consumer preferences, pain points, and trends within the industry. This research is the basis for crafting compelling advertising messages that resonate with the audience.

A good jumping-off point for consumer research is Google Reviews. Eighty-one percent of consumers use Google to evaluate local businesses, and 93% of online users say online reviews impact their buying decisions. Online reviews offer valuable insights from real customers which reveal preferences and pain points to address in digital advertising campaigns.

Look at your own agency's online reviews. Then, take it a step further and use a satisfaction survey company like [Activated Insights](#) for deeper insights into clients' and employees' thoughts about your company. What are current and former clients saying about your services? Do you notice recurring themes, such as clients needing caregivers in areas you don't currently service, more round-the-clock care, etc.?

Also, look at competitors' reviews to gauge any trending problems that your agency might be able to solve for unhappy clients or if there are ways you can improve to meet consumers' needs in your market area better.

Monitoring Key Data Points

The sheer amount of data available to you can feel overwhelming. However, to gauge the success of digital advertising efforts and increase return on ad spend (ROAS), care companies must also monitor and

measure various vital data points. The following are some crucial metrics for care companies to focus on:

Google Ads

• **Google Pay-Per-Click (PPC) Advertising:** Analyzing the performance of PPC campaigns provides valuable insights into the effectiveness of your paid advertising efforts. Agencies should keep a close eye on the following metrics:

- Click-through rates
- Cost per conversion
- Cost per click
- Lead attribution
- Overall ROAS

Search Engine Optimization (SEO)

- **Organic Search Visibility:** While paid ads are an important aspect of marketing, improving organic search rankings is essential for long-term success. Monitoring keyword performance and optimizing content accordingly helps boost visibility on search engine results pages.
- **Organic Website Traffic:** Tracking organic website traffic provides insights into the effectiveness of your SEO strategies. Increased organic traffic typically correlates with improved search engine rankings.
- **Conversion Actions:** Tracking conversion actions is integral to any digital marketing strategy as it offers a valuable understanding of the effectiveness of various marketing efforts and helps businesses optimize their campaigns for maximum impact. Conversion actions represent how users act after viewing your website, such as calling your company, submitting a contact form, or signing up for a newsletter. Be sure to track clicks to call, form submissions, chat interactions, newsletter sign-ups, and content downloads.



Analyzing Content Performance and Leads

- **Content Resonance:** Analyzing content performance across various channels, including social media sites, blogs, and email marketing campaigns, is essential for understanding what resonates with your audience. By examining metrics specific to each channel, such as likes, shares, comments, and engagement rates on social media sites; page views, time on page, and bounce rates on blogs; and open rates, click-through rates, and conversion rates in email marketing, you can gain valuable insights into audience preferences and behaviors. These insights tell you what content resonates, what you should do more, and what can be effectively repurposed.
- **Lead Attribution:** Monitoring lead attribution is crucial for data-driven marketing decisions. It involves assigning verifiable credit to specific ads, campaigns, or channels that generate leads, such as Google ads, search optimization efforts, social channels, etc. By accurately attributing leads to their campaign sources, marketers can identify which campaigns drive the most inquiries and optimize or adjust their strategies accordingly. Several lead attribution services and applications take the guesswork out of which ads are funneling callers to your agency, and they can help you make vital decisions about your campaigns. For example, if you get high-quality leads from a particular ad, you may want to increase the budget or reach for that ad. Alternatively, if you receive multiple calls from an ad, but callers think they are contacting a medical equipment company, this suggests that the ad needs adjustments.
- **Lead Quality:** Getting more calls and website visits is a significant step, but the quality of those leads is what counts. Monitor how many callers are reaching out due to your digital marketing content. How many of those leads are you speaking to on the phone?

Also, track how many of these inquiries are converting to actual clients.

- **Lead Follow-up:** How well your team follows up with leads significantly impacts client acquisition. Follow the customer's journey through Customer Relationship Management (CRM) software. How quickly is the team responding, and are they hitting the follow-up deadlines?

Adjusting Course Based on Data Insights

The real power of consumer-driven data lies in the ability to adapt and refine strategies based on insights gained from monitoring. Care companies should be prepared to adjust their digital advertising tactics to ensure maximum effectiveness.

- **Adapting Ad Copy:** Analyzing consumer-driven data allows care companies to identify which ad copy resonates most with the target audience. By monitoring metrics such as click-through rates, conversion rates, and engagement levels, companies can determine which messaging is most effective and refine ad copy accordingly. This might involve testing different headlines, calls-to-action, or value propositions to optimize performance.
- **Reallocating Budget:** Data should be used to reallocate advertising budget to channels generating the highest return on investment (ROI). For example, if advertising on Google drives significantly more conversions than social media ads, reallocating the budget from social media to Google Ads can maximize overall effectiveness and ROI.
- **Testing and Experimentation:** Consumer-driven data empowers care companies to conduct A/B testing and experimentation to optimize digital advertising strategies. By testing different ad formats, creative elements, targeting options, and campaign settings, care companies can identify which variables impact performance most and make data-driven

decisions to refine their strategies accordingly. This iterative approach to testing and experimentation allows care companies to continually optimize their digital advertising efforts and stay ahead of the competition.

Adopting a data-driven marketing approach provides agencies with a more focused approach to digital advertising, allowing them to hone in on the right audience and improve ROI. By analyzing consumer-driven data, care companies can adapt and refine their strategies in real-time, optimize ad copy, reallocate budget to high-performing channels, refine targeting parameters, and conduct testing and experimentation to improve performance and drive better results continually. This data-driven approach enables care companies to stay agile, responsive, and competitive regardless of the marketing climate. ■

ABOUT THE AUTHOR

Marisa Snook, President/CEO of corecubed, has worked in public relations and marketing for over 20 years, focusing on care marketing since 2005. She was instrumental in developing corecubed's award-winning care marketing program, MOSTSM. Specializing in digital and content marketing for care companies in all stages of growth, she leads an extraordinarily talented team whose bench strength includes decades of care marketing experience, digital marketing expertise, and content writing and search marketing certifications.

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Visit: www.corecubed.com

ARTICLE

15 Ways Online Reviews Boost Sales & Marketing



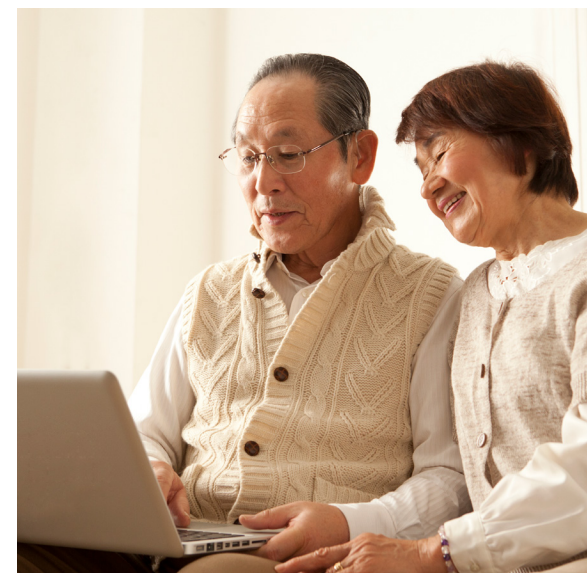
Denise Graab

Director of Reviews
and Marketing
caring.com



Online reviews play an incredibly important role when seniors and their families are researching and selecting in-home care agencies. There are more than 15,500 online searches per hour for senior care and senior living, and online reviews are highly sought by care seekers. Last year, [98% of Americans read online reviews](#) when researching local companies, with healthcare and service business reviews among the most important.

To help agencies seize this opportunity, and in celebration of Activated Insights' 15th annual Benchmarking Report, here are 15 ways to boost sales and marketing through online reviews:



“Having an exceptional online reputation requires a culture that sincerely values and actively seeks customer feedback. It’s not a one-off task; **it’s an ongoing endeavor.**”

1. Increase Agency Visibility and Reach

Given their popularity, reviews contribute to improved rankings on search engines and local directories. Agencies with greater review volume appear higher and more prominently, increasing their visibility and reach to potential clients.

Caring.com data analysts have studied the minimum volume of reviews that senior care agencies need for care seekers’ online attention and inquiries. At least seven reviews are required for optimizing digital marketing success, with reviews thereafter continuing to add value.

2. Differentiate Agencies From Competitors

In a crowded market, reviews highlighting unique selling points and detailing client experiences help agencies stand out from competitors and attract new clients.

As a care seeker considering several agencies with similar services and prices: are you more inclined to choose the agency with few reviews, no recent feedback, and a low overall rating, or the one with many high-quality reviews, recent feedback, and a great overall rating?

3. Attract Prospective Clients

The influence of reviews is clear:

- Podium found reviews are two times more likely to be [an important factor](#) when choosing a local business than loyalty, and 7.4 times more likely than traditional marketing.
- A Caring.com analysis found that a home care organization with [100+ listings averaged 150% more leads](#) for agencies with 15+ reviews than those with 1-2 reviews.
- PowerReviews says that [9 in 10 people consider reviews](#) when making purchasing decisions, and nearly half won’t make the purchase without reviews.

If your agency isn’t getting enough leads or callbacks, you may need more or better reviews.

4. Enhance Credibility and Trust

Online reviews are now [trusted as much as personal recommendations](#)—especially when researching care for a loved one in another state or without local contacts. While some review sites are more trustworthy than others (such as those proactively protecting against fake reviews and conflicts of interest), online reviews can convey service quality and support trust in marketing. Reviews make the pitch more believable.



5. Build Service Reputation

Having an exceptional online reputation requires a culture that sincerely values and actively seeks customer feedback. It’s not a one-off task; it’s an ongoing endeavor.

Make it easy for satisfied clients to share their experiences in online reviews without feeling pressured or burdened. Provide a link to the review submission form or the number for the reviews-by-phone service. And don’t be afraid to send a few friendly reminders to less proactive clients.



6. Provide “Social Proof” for Closing Sales

Online reviews provide authentic, relatable content conveying the real-world impact of an agency’s services. Having positive review snippets in agency handouts, social media posts, and email signatures provides compelling testimonials, especially when linked and viewable on a third-party site.

This “social proof” increases prospects’ [likelihood to convert](#). When done well, sharing reviews and client-experience narratives evokes positive emotions and resonates in ways that drive sales.

7. Identify Brand Advocates and Bolster Referrals

Satisfied clients who’ve posted online reviews can be effective brand advocates for agencies. Nurturing these relationships and acknowledging client feedback can foster long-term loyalty and advocacy to attract more great customers. Thank clients who post positive online reviews. Online reviews also show those making word-of-mouth referrals that what they’re saying is a perspective shared by others.



8. Enhance or Improve Services

Online reviews illuminate what’s working well in existing services and operations, inspire ideas for enhancing or expanding the offering, and identify improvement opportunities. Agencies can use the constructive feedback to explore and address service deficiencies, improving the quality of the companionship and care provided. The business changes made from monitoring and learning from online reputation can help to better market and grow the agency.

9. Demonstrate a Commitment to Excellence

Review responses foster trust and transparency, showing the agency is listening and cares. Responding to reviews can also increase ratings and review volume thereafter.

To demonstrate client satisfaction commitment: stay professional and empathetic; be grateful; and avoid being defensive, combative, or dismissive. Never disclose private details, especially protected health information. Have a growth mindset and leave a positive impression with potential clients.

No business is flawless. Having a few negative reviews can provide a balanced perspective and support positive review credibility.

10. Protect Agency Reputation

Implementing tools and processes to monitor online reviews enables agencies to promptly address feedback or concerns. Proactive reputation management is essential for mitigating potential damage to agency reputation and preserving client trust.

And in the rare event of an unfortunate PR crisis: having positive reviews on multiple review websites can help establish and defend your agency’s reputation or serve as counterbalance to public critique (such as in negative news media coverage).

11. Earn Agency Awards

Great reviews can lead to service excellence awards. Activated Insights’ (formerly Home Care Pulse’s) [“Best of Home Care” awards](#), or the [Caring Stars award](#) from Caring.com, recognize agencies for review volume, recent feedback, and high ratings. These awards enhance sales and marketing when displayed on websites, social media profiles, and printed materials — providing tangible evidence of quality services and customer satisfaction. This valuable marketing can help attract prospects and drive sales—connecting customer feedback, industry recognition, and business success.

12. Celebrate and Attract Top Talent

Positive online reviews can motivate staff, by highlighting the importance of their efforts. Incorporating positive client feedback into staff training and company meetings can boost morale and reinforce a culture of excellence. Positive reviews can also attract talented candidates in high demand, seeking to work for the best agencies. Building and fostering a great team of happy caregivers ultimately leads to quality service in clients’ homes and more satisfied customers.

13. Strengthen Marketing

By monitoring and analyzing reviews, marketers can extract insights to evaluate reputation strategies and tactics. How often is the agency getting reviews? Are senior clients adding more five-star reviews or higher



“Proactive **reputation management** is essential for mitigating potential damage to agency reputation and preserving client trust.”

quality reviews than their families? How do the agency’s reviews compare to those of local competitors? Which review-ask campaign drove the highest volume? The answers can help identify the best potential reviewers, times for asking, methods for asking, and additional insights to drive success.

14. Inform Content Strategy

Online reviews can inspire marketing content creation. By analyzing topics and themes in reviews, agencies can identify common concerns, questions, and interests among seniors and their families. This can lead to blog posts, social media posts, and newsletter articles that uphold the agency as a senior care expert. This content can nurture potential clients, keeping them engaged before they’re ready to hire the agency.

15. Generate More Reviews

A good volume of online reviews, when hosted on trusted websites and promoted across marketing channels, can inspire more people to share their feedback. A happy customer seeing an undeserved negative review may then give a 5-star review.

As the saying goes, “the crowd attracts the crowd,” stemming from a desire for community involvement and belonging. Each customer’s perspective is unique and valuable, and online reviews provide a platform for individuals to express opinions and experiences and feel heard and valued.

This interconnected process underscores the pivotal role of customer reviews in shaping perceptions and driving sales success in competitive market landscapes. ■

ABOUT THE AUTHOR

[Denise Graab](#) is Director of Reviews and Marketing at Caring.com, a leading senior care referral service and top site for consumer reviews. She has three decades of marketing communications experience, with a focus on social media and online reviews for the past 17 years. Since joining Caring in 2010, she’s helped establish and manage the longest-running, highest-integrity senior care reviews program on the web, and oversees the Caring Stars award.

To receive more online reputation guidance from her, and grow your reviews profile on [Caring.com](#): please contact reviews@caring.com or (650) 762-8190.



SUMMARY

Recruitment & Retention

As the industry continues to combat the historic staffing shortage, care staff recruitment and retention remains the highest concern for all post-acute care organizations. The Recruitment & Retention section takes a look at the most common hiring and staff retention practices, evaluates the effectiveness of these methods, and breaks down which turnover challenges are most relevant to your geographic region. This section also analyzes what constitutes a competitive compensation, benefits, and training package for your region to help you create your own unique strategy for improving the employee experience.



Section Contents

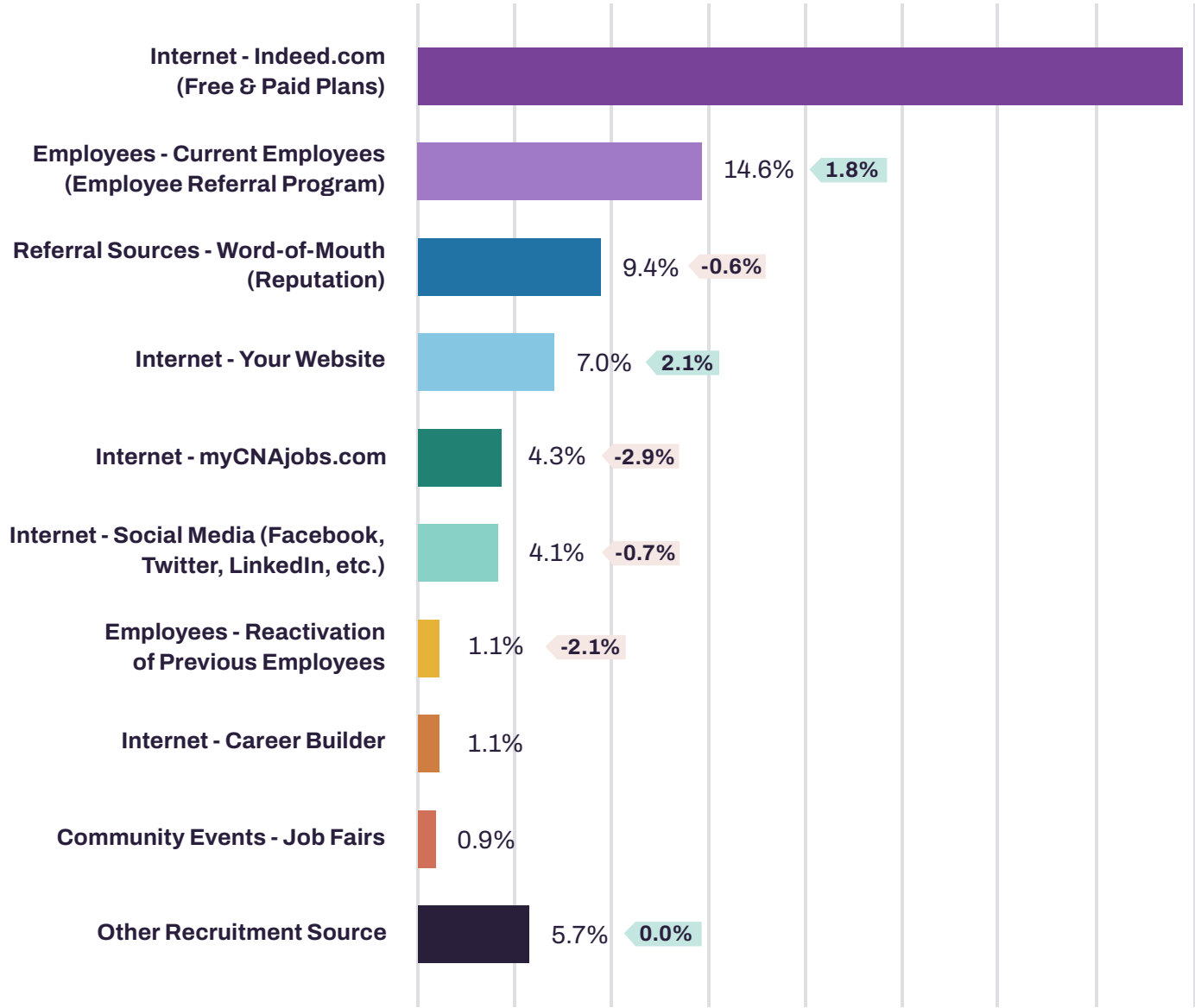
- 46** Recruitment Sources
- 53** Staffing Shortages
- 62** Nurse Hiring Conversions
- 63** Professional Caregiver Hiring Conversions
- 65** Professional Caregiver Turnover Rates
- 71** Revenue Per Professional Caregiver Employee
- 74** Care Staff Wages
- 77** Wages Comparison
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- 86** *Growth Without Overwhelm: Turning Chaos Into Your Competitive Advantage*
- 89** *Differentiating Your Business by Boosting Satisfaction: 5 Ways to Pull it Off in Long-Term & Post-Acute Care*

RECRUITMENT SOURCES

2.1 **Home Care** Top 10 Professional Caregiver Recruitment Sources/Methods for 2023



From a list provided, survey participants were asked to select their top two **most effective** professional caregiver recruitment sources and methods used in 2023.

Highlighted percentages represent the change year-over-year.
See **page 49** for a complete list of other recruitment sources/methods.

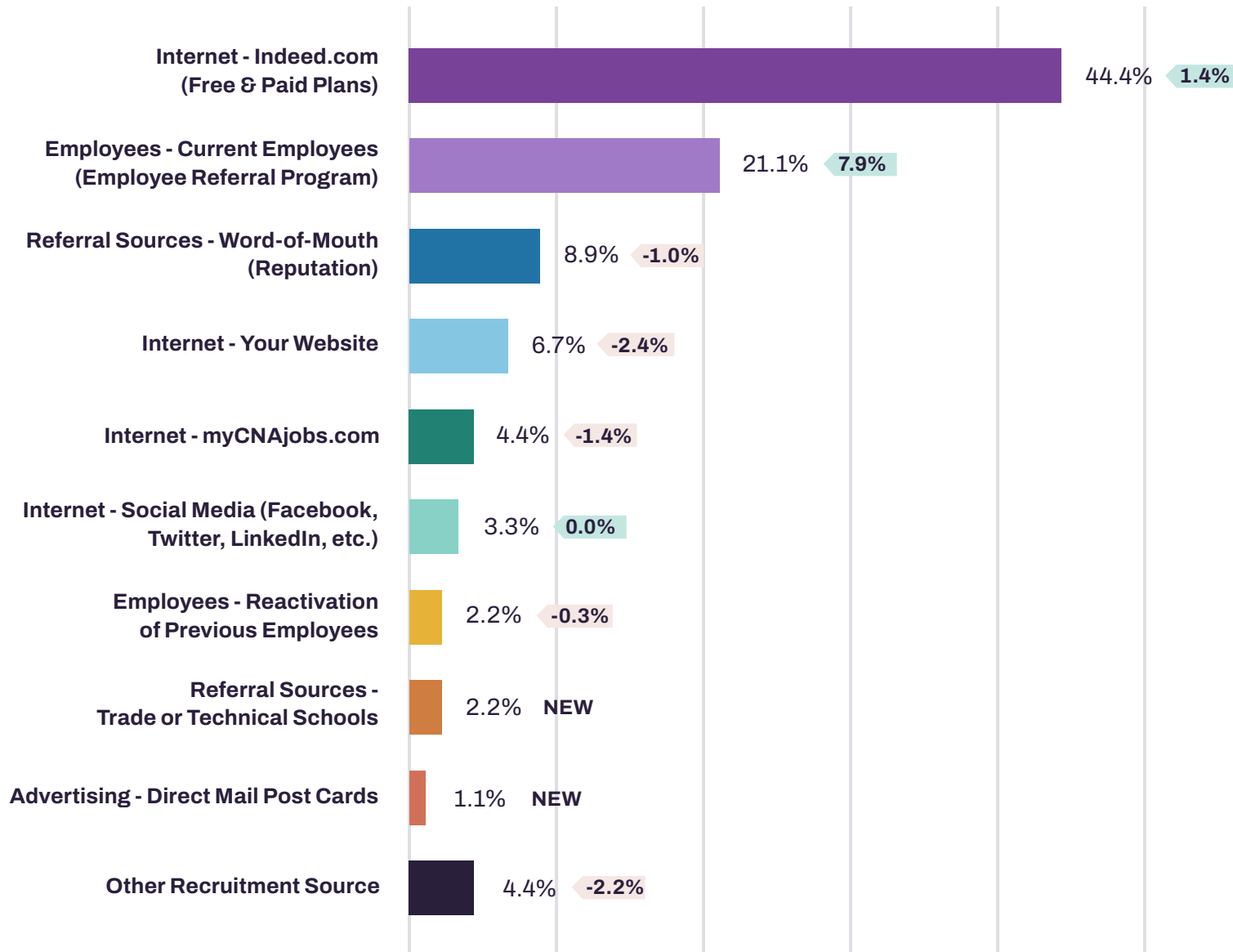
**Attract Top Professional Caregivers**

The best employees want to work for quality organizations. Use client and employee testimonials, satisfaction scores, awards and recognitions, and other resources to attract top employees to work for you. Learn more on **page 188**.



RECRUITMENT SOURCES

2.2 Home Care Top 10 Professional Caregiver Recruitment Sources/Methods for 2023 - Masters



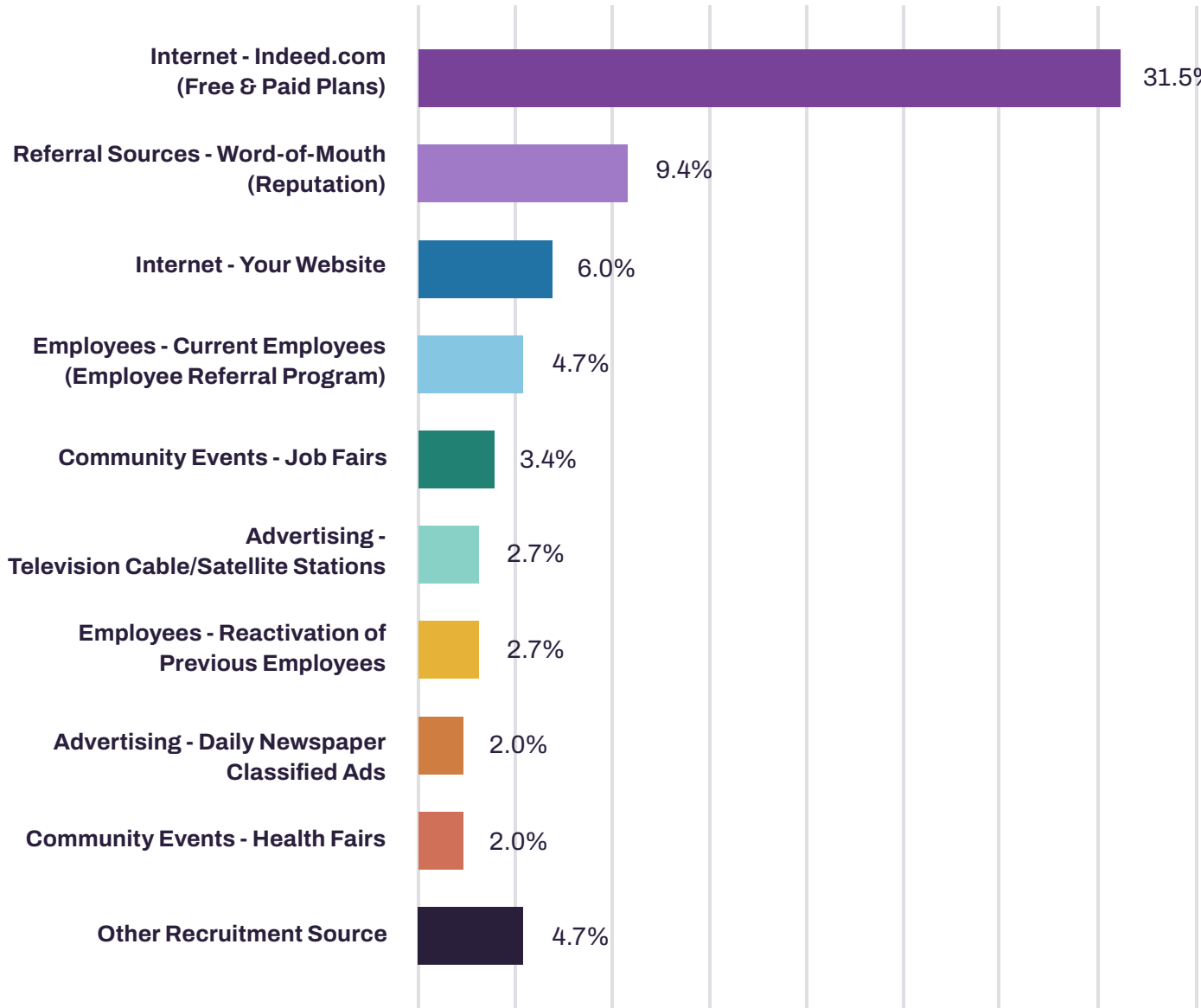
From a list provided, survey participants were asked to select their top two **most effective** professional caregiver recruitment sources and methods used in 2023. Masters represent those home care providers who billed \$5M+ in annual revenue in 2023.

Highlighted percentages represent the change year over year.

See **page 49** for a complete list of other recruitment sources/methods.

RECRUITMENT SOURCES

2.3 **Home Health** **Hospice** Top 10 Care Professional Recruitment Sources/Methods for 2023



From a list provided, survey participants were asked to select their top two **most effective** recruitment sources and methods used to hire care professionals in 2023.

See **page 49** for a complete list of other recruitment sources/methods.

**Attract Top Professional Caregivers**

The best employees want to work for quality organizations. Use client and employee testimonials, satisfaction scores, awards and recognitions, and other resources to attract top employees to work for you. Learn more on **page 188**.



RECRUITMENT SOURCES

Recruitment Sources/Methods

This list is a compilation of the other great professional caregiver recruitment sources that providers have indicated they use. It can be a great resource if you're looking for other ideas of where you might try and recruit additional professional caregivers. **Options submitted under "Other" for 2023 are highlighted in red.**

ADVERTISING

- Church or Faith-Based Newspaper
- Corporate TV Ads
- College Job Boards
- Daily Newspaper Classified Ads
- Direct Mail Flyers
- Direct Mail Post Cards
- Ethnic/Foreign Newspapers
- Flyers - Leave at local businesses/ Bus stops
- **Geofencing (mobile ads)**
- Library Job Boards
- Newspaper - The Royal Gazette
- Outdoor (billboards, benches, signs, etc.)
- Penny Saver/Thrifty Nickel (or other free local paper)
- Radio - Christian or Faith-Based Stations
- Radio - Music Stations
- Radio - Talk Stations
- Regional Newspapers
- Senior Directory Ads
- Signs or Banners on Your Building
- Television - Cable/Satellite Stations
- Television - Primary Network Stations (ABC, NBC, CBS, FOX)
- Television - Public Broadcasting Station (PBS)

EMPLOYEES

- Texting Program
- Text Message Blast
- Weekly Newspaper Classified Ads
- Yard Signs Placed at Intersections
- Yellow Pages - Online

COMMUNITY

- Chamber of Commerce
- Church Clergy and Administrators
- Community Articles, etc.
- Community Professional Caregiver Training
- Four-Year Universities
- Hair Dressers and Beauty Salons
- Health Fairs
- **Internal Contacts**
- Job Fairs
- Junior or Community Colleges
- Local Schools
- **Own Personal Network**
- Speaking Engagements
- Sponsorships (e.g. Alzheimer's Walk)
- Vocational, Technical, or Trade Schools
- WIN Job Center
- Work Force Services Local Office

INTERNET

- **Current Employees (Employee Referral Program)**
- **Current/Past Staff**
- **Employee Referrals**
- Reactivation of Previously Employed Care Professionals
- **Adzuna**
- **Agency Website (Johns Hopkins Health System)**
- A Place For Mom
- BetterTeam
- **BSL Site**
- Care.com
- Career Builder
- Careerguru.com
- **CareerPlug**
- CaregiverHR.com
- Caregiverlist.com
- **CareinHomes.com**
- Choice Local
- Company Blog
- Craigslist.org Job Ads
- Email Campaigns to Referral Sources
- **Engyj/Saba SEO**
- GenerationsUnite.com

- GetHired.com
- Glassdoor
- Google Ad Words/Pay-per-Click
- Handshake
- Healthcare Source/Vikus
- Hireology
- Hotjobs.com
- Indeed.com
- JazzHR
- Jobing.com
- Jobs.com
- Jobsinme.com
- Jobs-to-careers.com
- Jobtarget.com
- LDS Employment Services
- Local Career Websites
- Local TV Station Website Board
- Monster.com
- myCNAjobs.com
- OnShift Platform
- **SEO**
- Snagajob.com
- Social Media (Facebook, Twitter, LinkedIn, etc.)
- Talroo
- Werkberry
- Workforce Services Website
- Workstream

RECRUITMENT SOURCES

- Yahoo! Jobs
- Your Website
- ZipRecruiter

JOB BOARDS

- College Job Boards
- Community Center Boards
- Grocery Store Job Boards
- Library Job Boards
- Workforce Services Job Board

OTHER

- AidQuest
- Apploi
- CHHA = Certified Home Health Aide Corporate Office
- Full-Time Recruiter
- Job Target
- Personal Visits to Patients in Facilities
- Reactivation of Previously Employed Professional Caregivers
- Walk-Ins

REFERRAL SOURCES

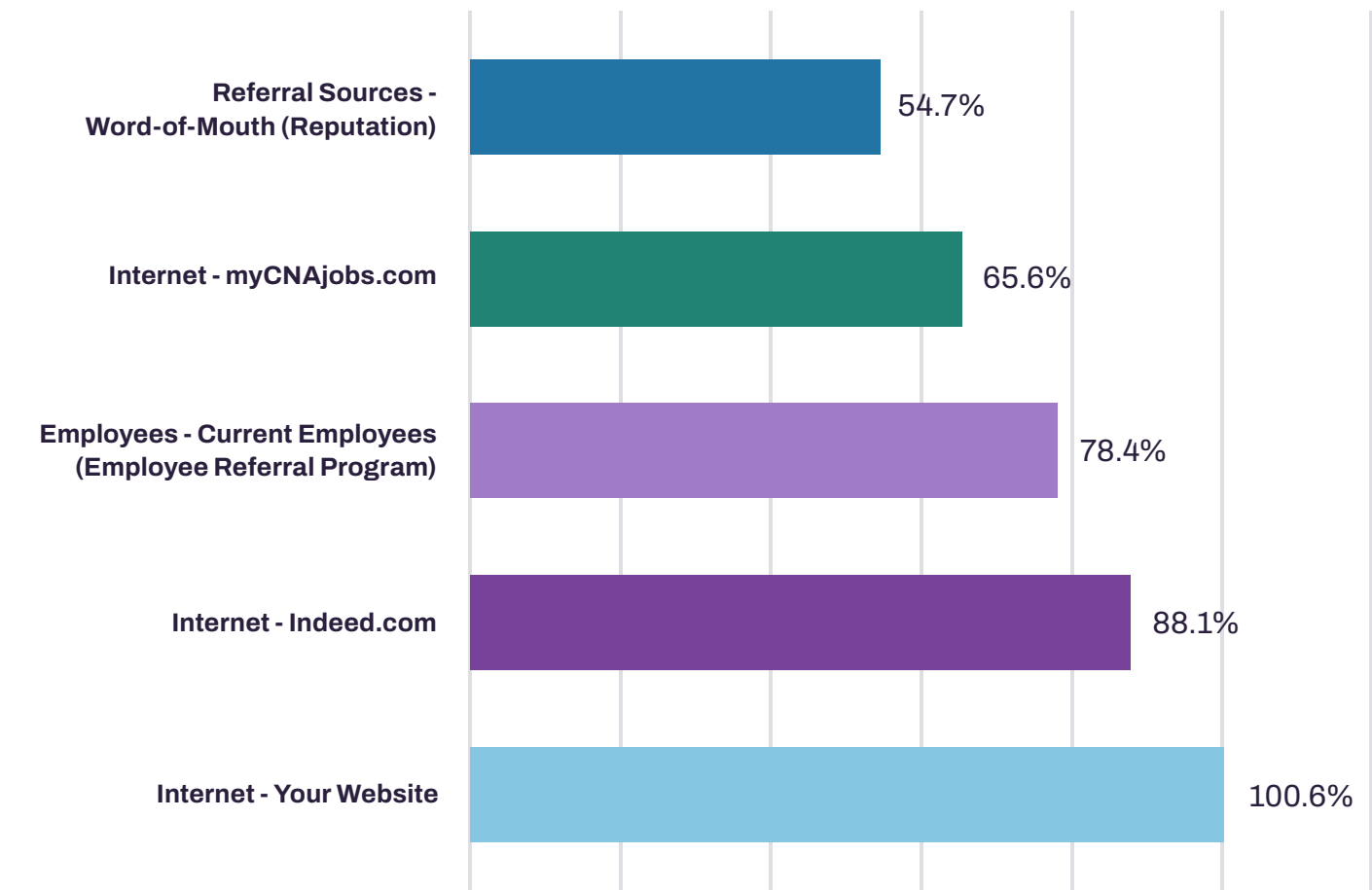
- AARP
- American Red Cross
- Assisted Living Facilities
- CNA or Home Health Aide Training Schools/Programs
- Current/Past Clients and Their Families
- Current/Past Employees

- Employment Agencies
- Franchisor
- Home Health Agencies (Medicare Certified)
- Hospice Agencies
- Hospitals
- Independent Living Facilities
- Other Franchise Offices
- Recruitment Agency
- Referral from Friends
- Referral from Current Caregivers
- Referral from Other Caregivers
- Schools of Nursing
- Senior Centers
- Skilled Nursing Facilities
- State Home Care Association
- Trade or Technical Schools
- Word-of-Mouth (Reputation)
- Work Force Services Local Office



RECRUITMENT SOURCES

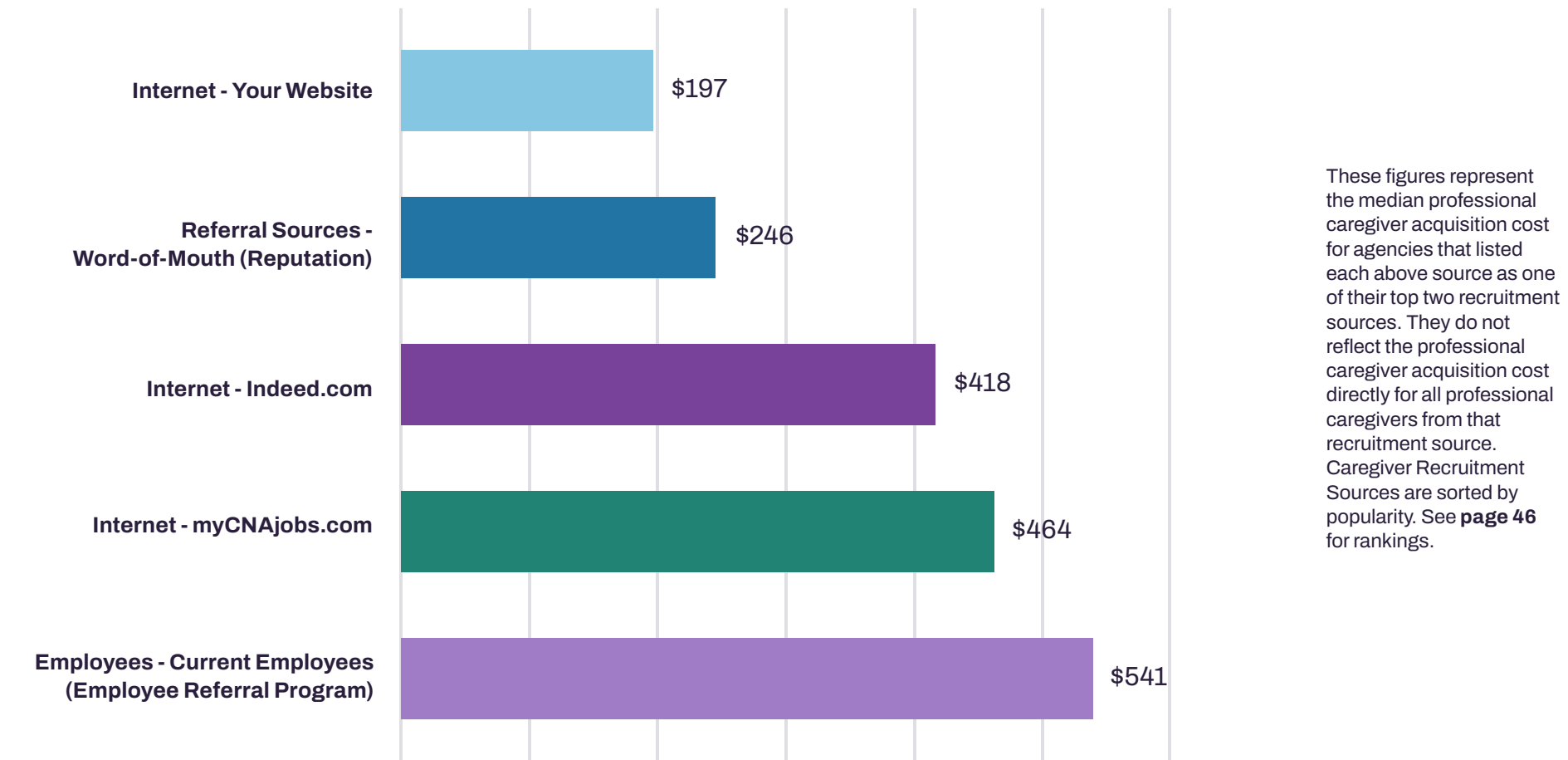
2.4 **Home Care** Top 5 Professional Caregiver Recruitment Sources for 2023 - Median Professional Caregiver Turnover



These figures represent the median professional caregiver turnover rate for agencies that listed each above source as one of their top two recruitment sources. They do not reflect the professional caregiver turnover rate directly for all professional caregivers from that recruitment source. Caregiver Recruitment Sources are sorted by popularity. See **page 46** for rankings.

RECRUITMENT SOURCES

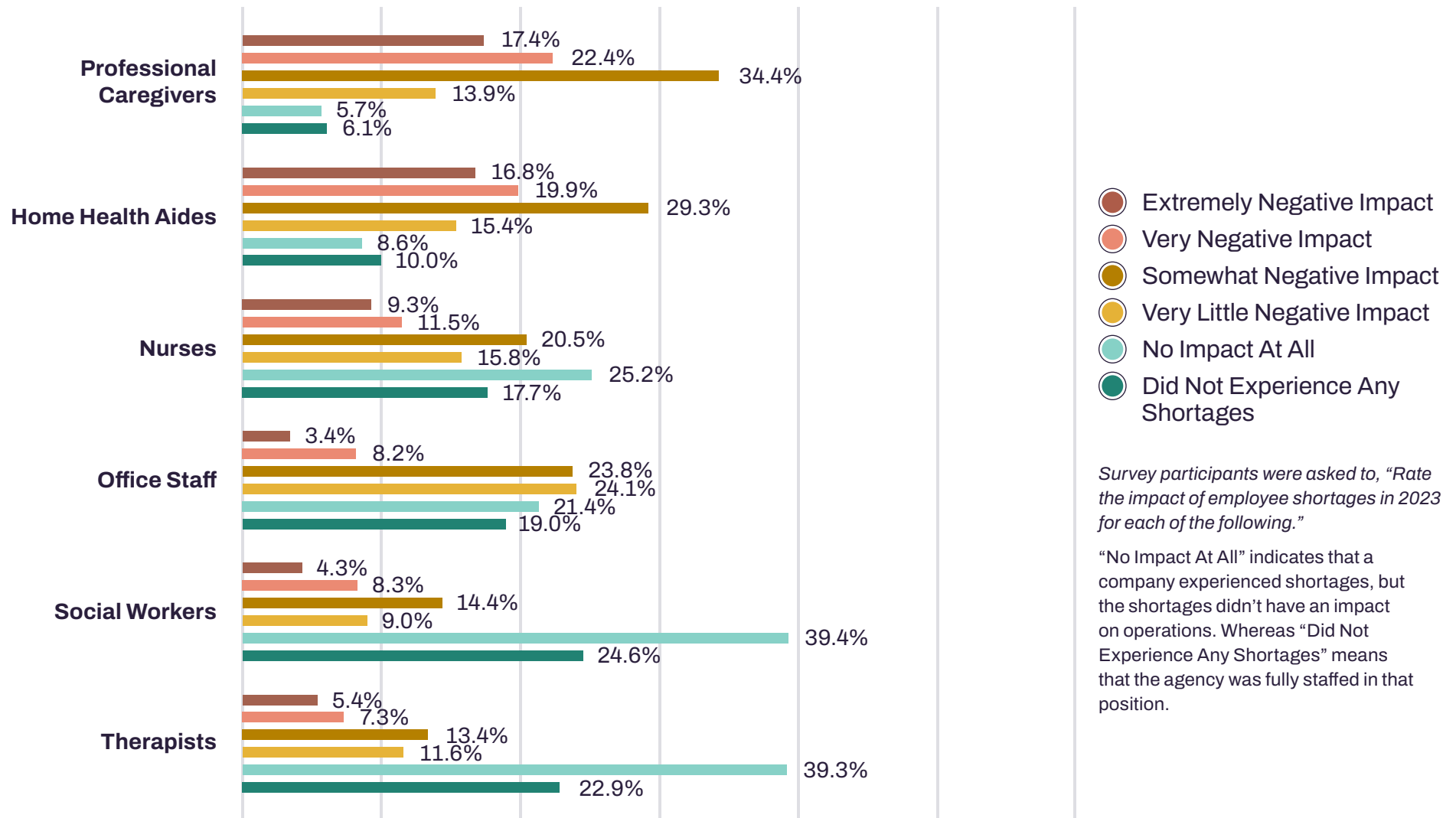
2.5 **Home Care** Top 5 Professional Caregiver Recruitment Sources for 2023 - Mean Professional Caregiver Acquisition Cost





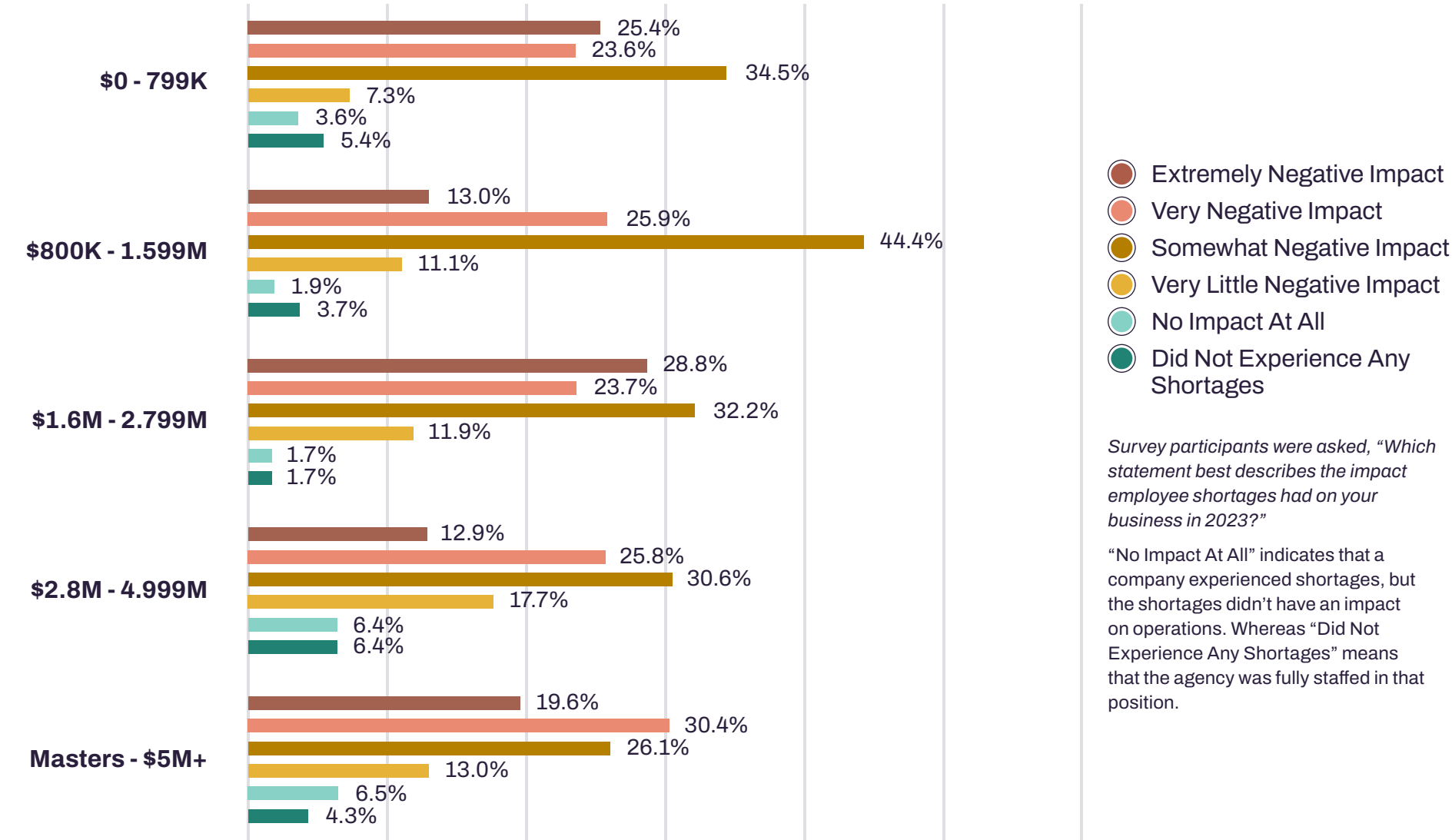
STAFFING SHORTAGES

2.6 Overall Impact of Shortages by Role



STAFFING SHORTAGES

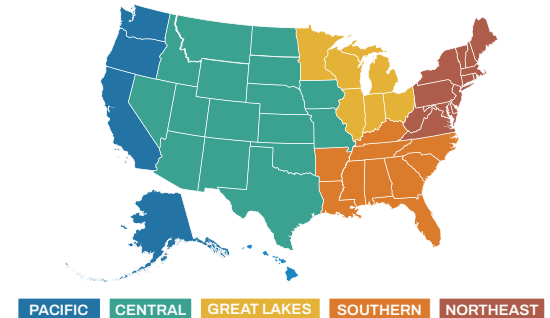
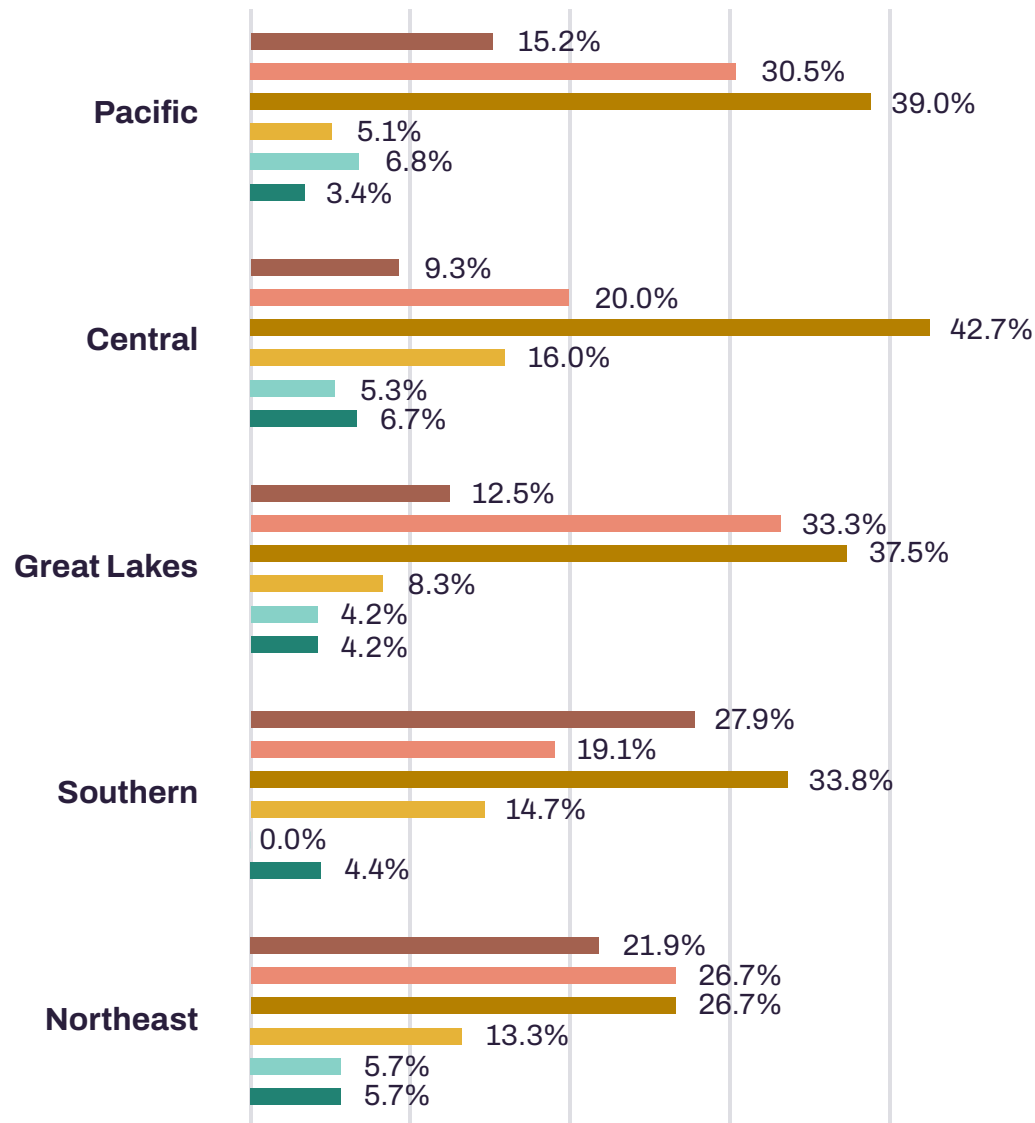
2.7 **Home Care** Impact of Professional Caregiver Shortages for 2023 - Revenue Range





STAFFING SHORTAGES

2.8 Home Care Impact of Professional Caregiver Shortages for 2023 - Geographic Regions



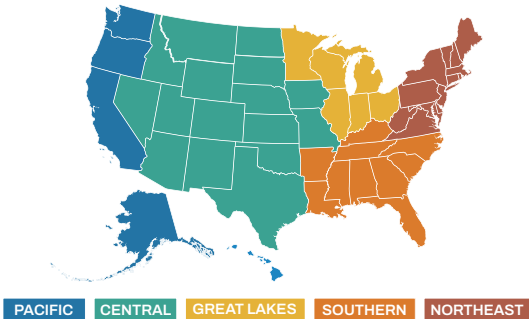
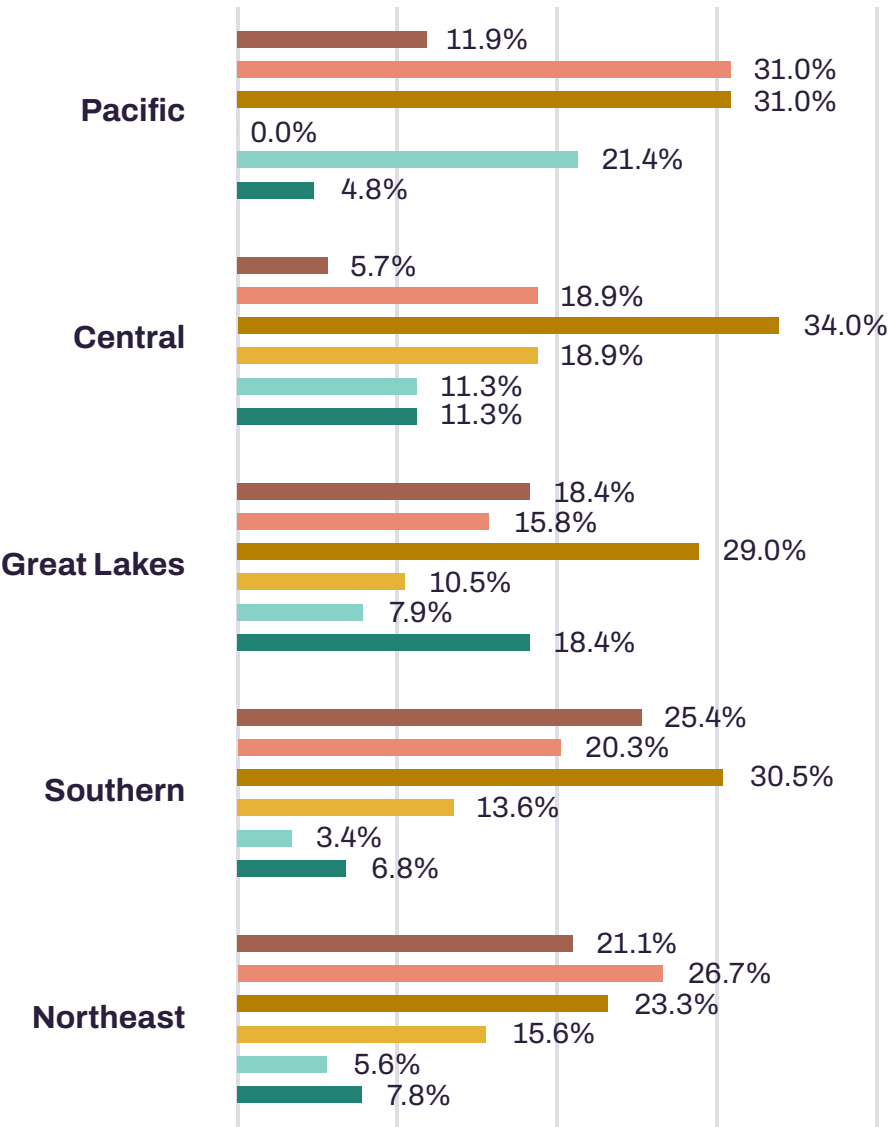
- Extremely Negative Impact
- Very Negative Impact
- Somewhat Negative Impact
- Very Little Negative Impact
- No Impact At All
- Did Not Experience Any Shortages

Survey participants were asked, "Which statement best describes the impact employee shortages had on your business in 2023?"

"No Impact At All" indicates that a company experienced shortages, but the shortages didn't have an impact on operations. Whereas "Did Not Experience Any Shortages" means that the agency was fully staffed in that position.

STAFFING SHORTAGES

2.9 **Home Health** **Hospice** Impact of Home Health Aide Shortages for 2023 - Geographic Regions



- Extremely Negative Impact
- Very Negative Impact
- Somewhat Negative Impact
- Very Little Negative Impact
- No Impact At All
- Did Not Experience Any Shortages

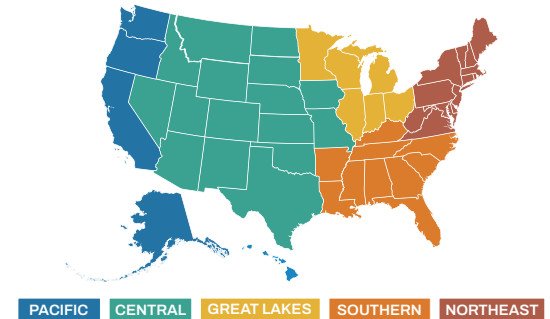
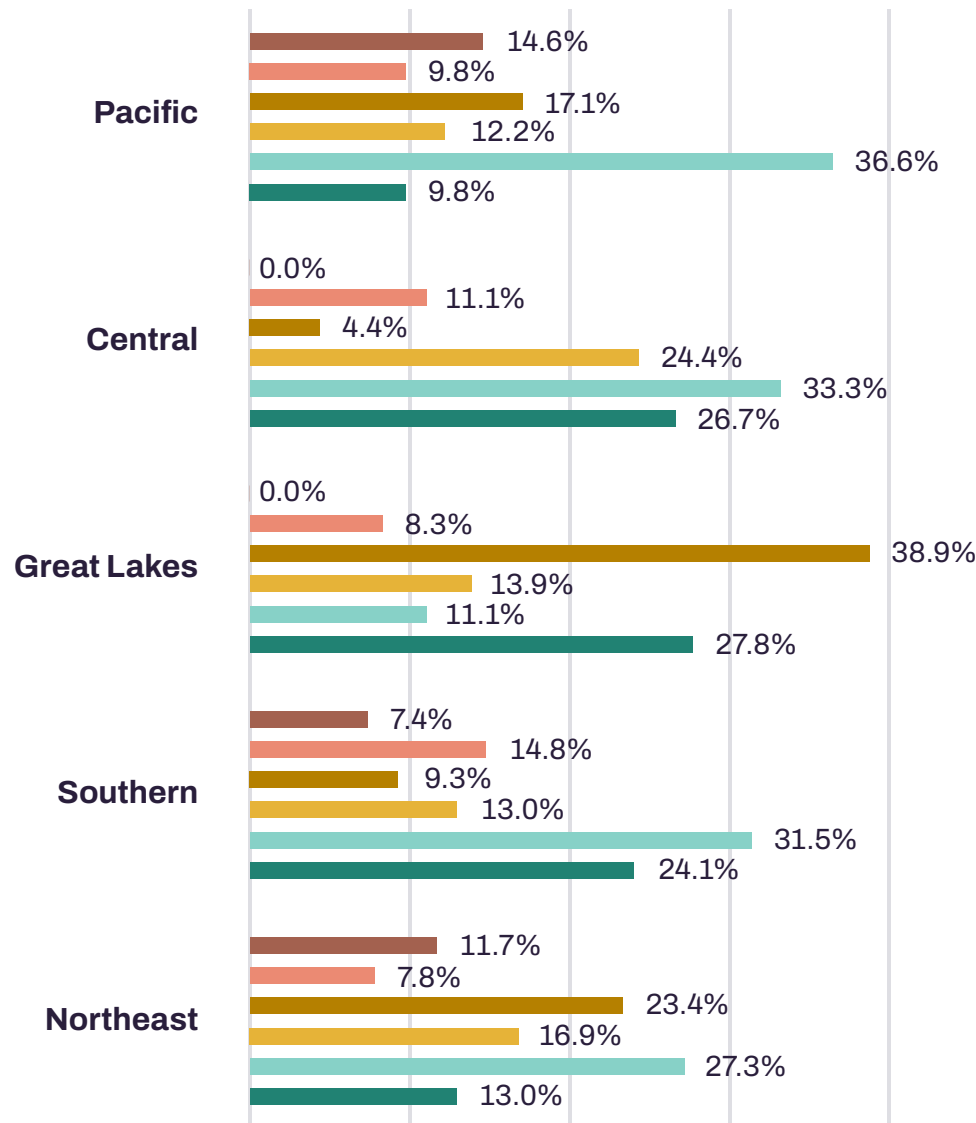
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STAFFING SHORTAGES

2.10 Home Health Hospice Impact of Nurse Shortages for 2023 - Geographic Regions



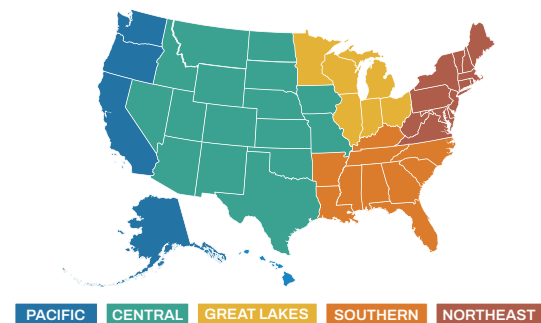
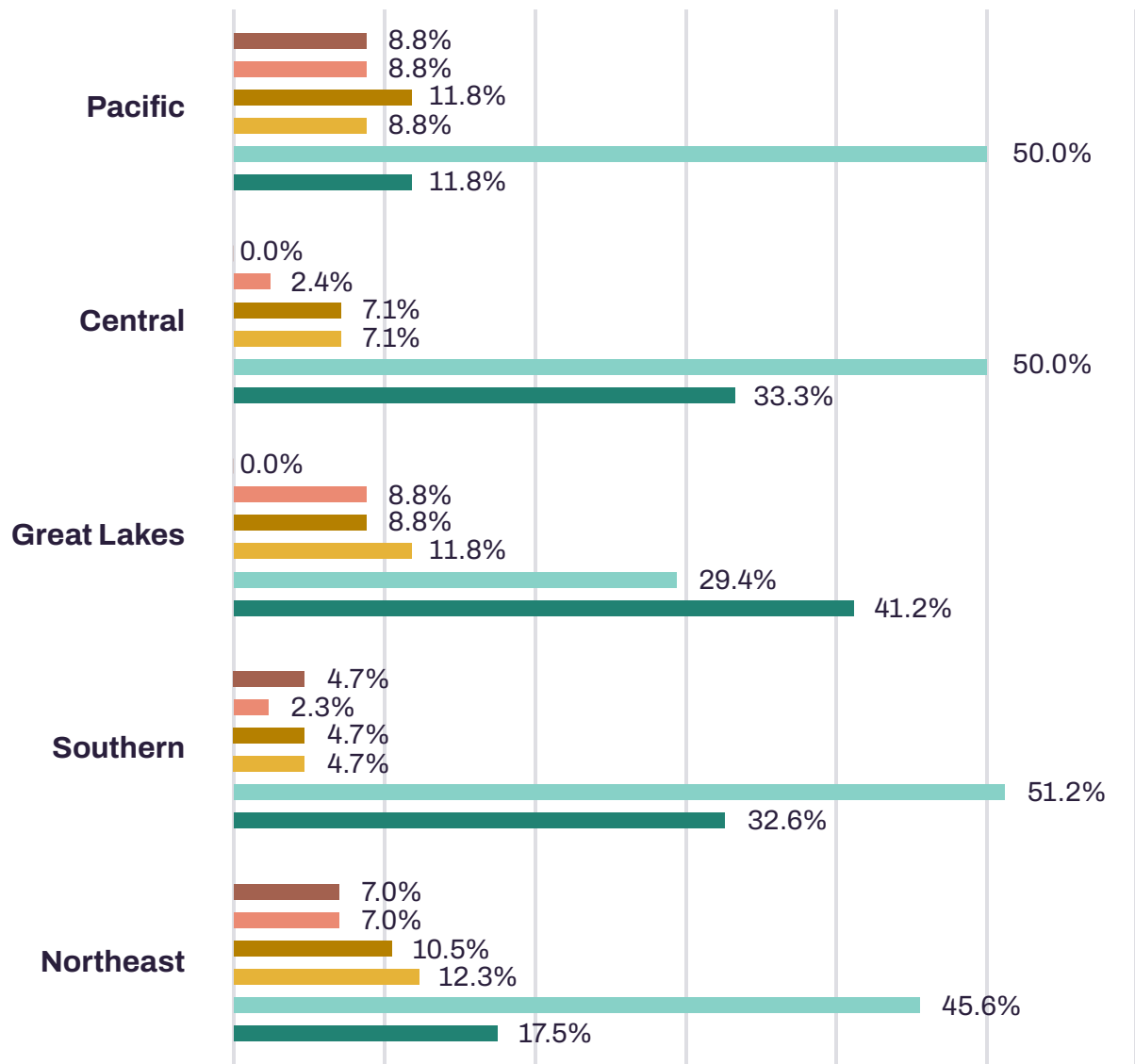
- Extremely Negative Impact
- Very Negative Impact
- Somewhat Negative Impact
- Very Little Negative Impact
- No Impact At All
- Did Not Experience Any Shortages

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STAFFING SHORTAGES

2.11 **Home Health** **Hospice** Impact of Therapist Shortages for 2023 -
Geographic Regions



- Extremely Negative Impact
- Very Negative Impact
- Somewhat Negative Impact
- Very Little Negative Impact
- No Impact At All
- Did Not Experience Any Shortages

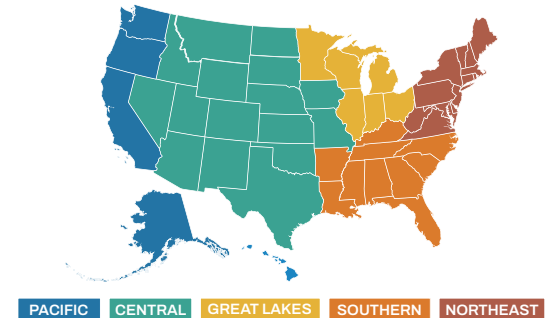
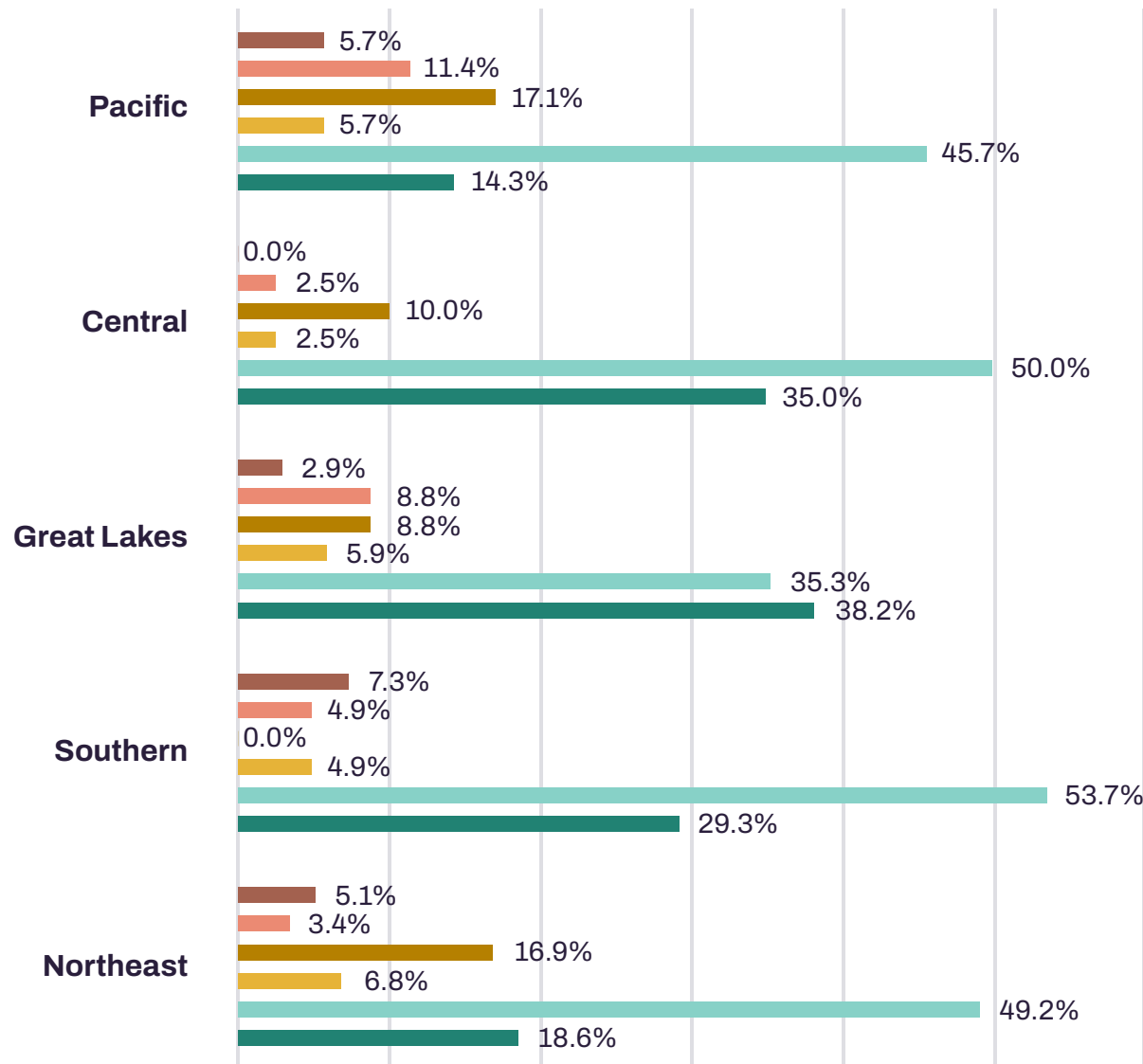
Survey participants were asked, “Which statement best describes the impact employee shortages had on your business in 2023?”

“No Impact At All” indicates that a company experienced shortages, but the shortages didn’t have an impact on operations. Whereas “Did Not Experience Any Shortages” means that the agency was fully staffed in that position.



STAFFING SHORTAGES

2.12 Home Health Hospice Impact of Social Worker Shortages for 2023 - Geographic Regions



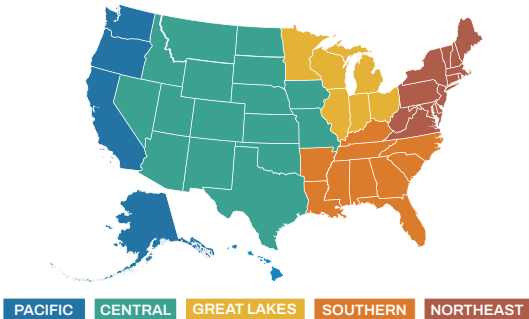
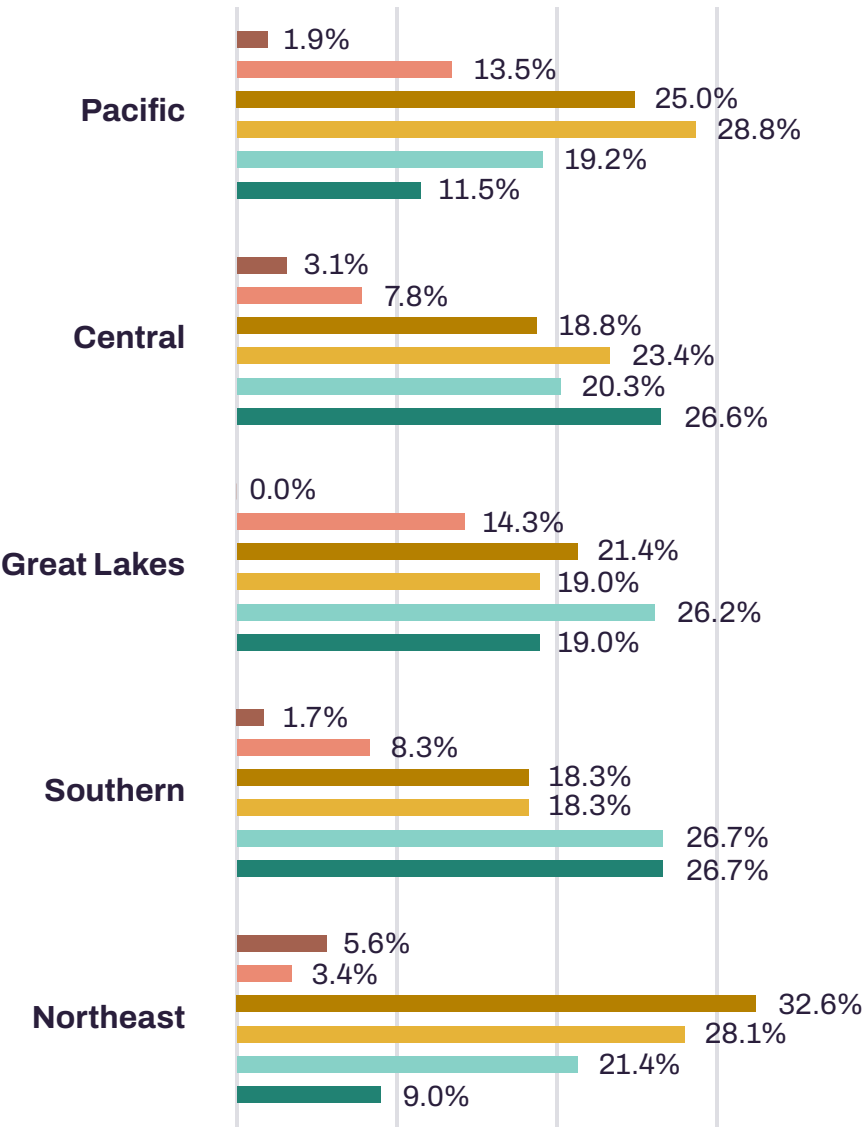
- Extremely Negative Impact
- Very Negative Impact
- Somewhat Negative Impact
- Very Little Negative Impact
- No Impact At All
- Did Not Experience Any Shortages

Survey participants were asked, "Which statement best describes the impact employee shortages had on your business in 2023?"

"No Impact At All" indicates that a company experienced shortages, but the shortages didn't have an impact on operations. Whereas "Did Not Experience Any Shortages" means that the agency was fully staffed in that position.

STAFFING SHORTAGES

2.13 Overall Impact of Office Staff Shortages for 2023 - Geographic Regions



- Extremely Negative Impact
- Very Negative Impact
- Somewhat Negative Impact
- Very Little Negative Impact
- No Impact At All
- Did Not Experience Any Shortages

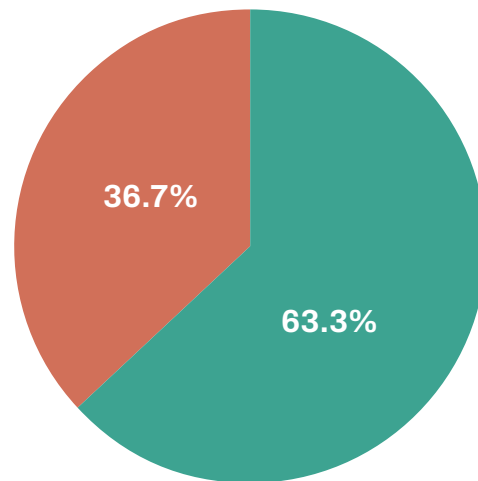
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STAFFING SHORTAGES

2.14 Overall Percentage of Agencies That Turned Down Cases At Any Point in 2023 Due to Professional Caregiver Shortage

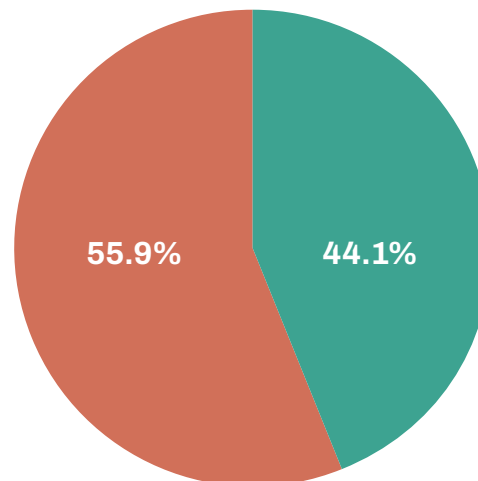


- Yes, Cases Were Turned Down At Any Point in 2023
- No, Cases Were Not Turned Down in 2023

Compared to 2022, there was a **16.2%** decrease in those that said, "Yes, Cases Were Turned Down at Any Point in 2023."

STAFFING SHORTAGES

2.15 Overall Percentage of Agencies That Consistently Turned Down Cases Due to Professional Caregiver Shortages As of January 2024

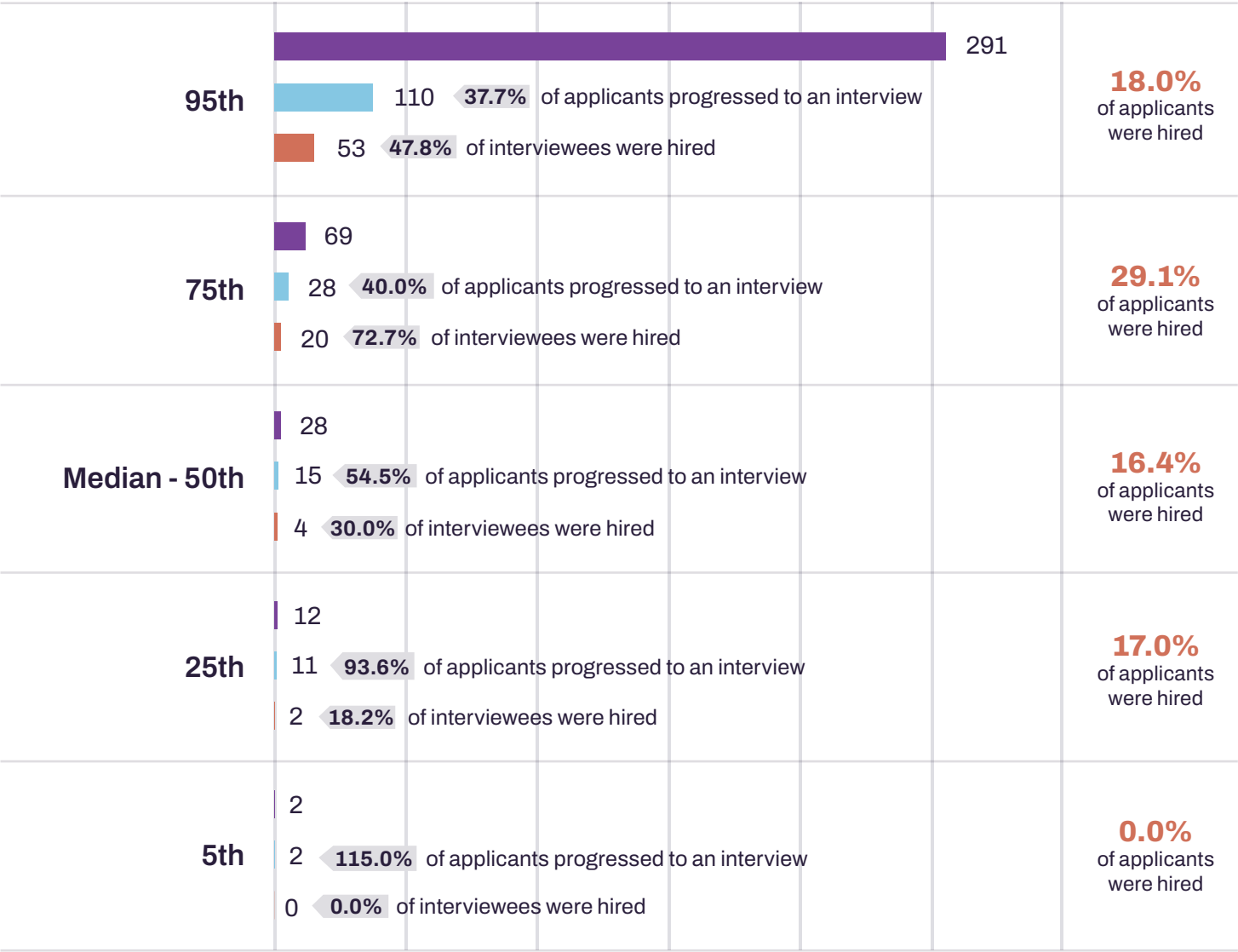


- Yes, Cases Were Consistently Turned Down Due to Professional Caregiver Shortages
- No, Cases Were Not Consistently Turned Down Due to Professional Caregiver Shortages

Compared to 2022, there was an **18.0%** decrease in those that said, "Yes, Cases Were Consistently Turned Down Due to Professional Caregiver Shortages as of January 2024."

NURSE HIRING CONVERSIONS

2.16 Home Health Hospice Median Nurse Hiring Conversions for 2023 - Percentile Ranking



- Applicants
- Interviews
- New Hires

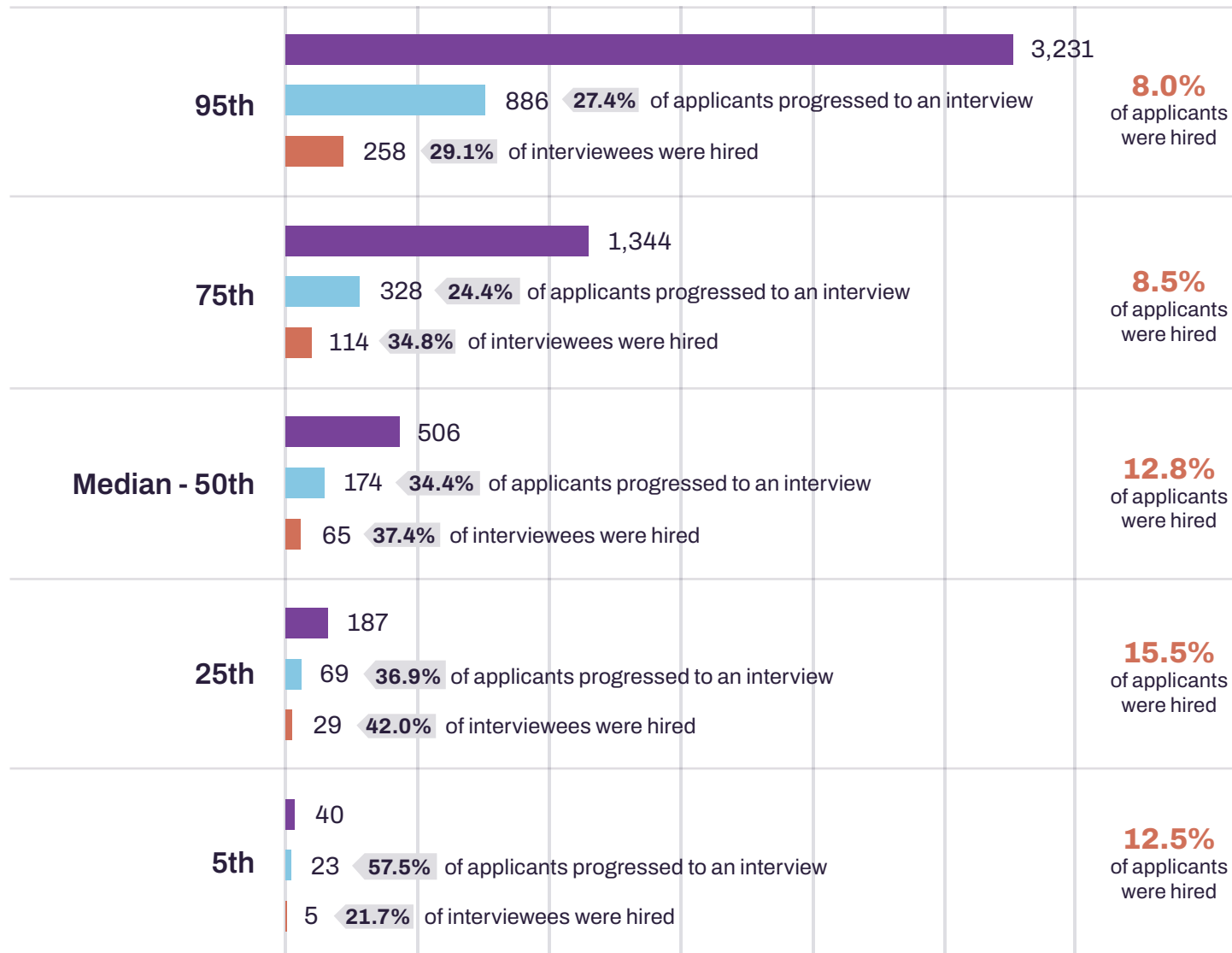
Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

This graph indicates that a higher number of applicants does not always correspond to a higher percentage of applicants hired. This may be due to organizations needing a finite number of new hires, but could also indicate that, at a certain volume, quality of applicants or ability to handle application volume decreases. For more information on recruitment sources, go to page 48.



PROFESSIONAL CAREGIVER HIRING CONVERSIONS

2.17 Home Care Median Professional Caregiver Hiring Conversions for 2023 - Percentile Ranking



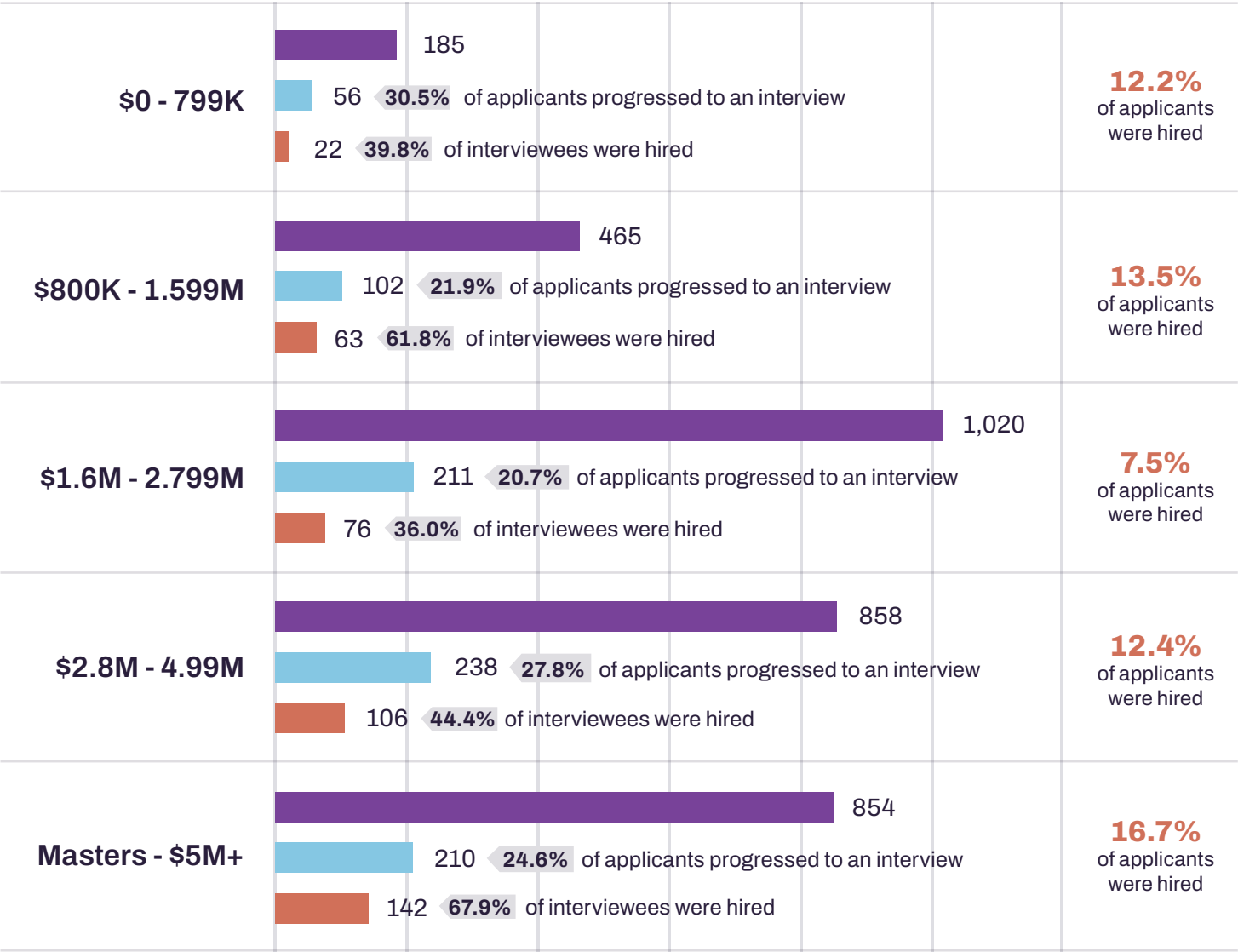
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Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

*This graph indicates that a higher number of applicants does not always correspond to a higher percentage of applicants hired. This may be due to organizations needing a finite number of new hires, but could also indicate that, at a certain volume, quality of applicants or ability to handle application volume decreases. For more information on recruitment sources, go to **page 46**.*

PROFESSIONAL CAREGIVER HIRING CONVERSIONS

2.18 **Home Care** Median Professional Caregiver Hiring Conversions for 2023 - Revenue Range



● Applicants
● Interviews
● New Hires

Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.



PROFESSIONAL CAREGIVER TURNOVER RATES

2.19 **Home Health** **Hospice** Historical Median Professional Caregiver Turnover Rate



Professional Caregiver Turnover Calculation

Professional Caregiver Turnover represents the percent of professional caregivers who quit or were terminated in 2023. Providers had to have been in business for at least one full year. Basic professional caregiver turnover is calculated by taking the **number of professional caregivers who quit or were terminated** in the year and dividing that number by the **average number of professional caregivers employed** in the same time period.

of Professional Caregivers Quit/Terminated

÷

Avg. # of Professional Caregivers Employed*

=

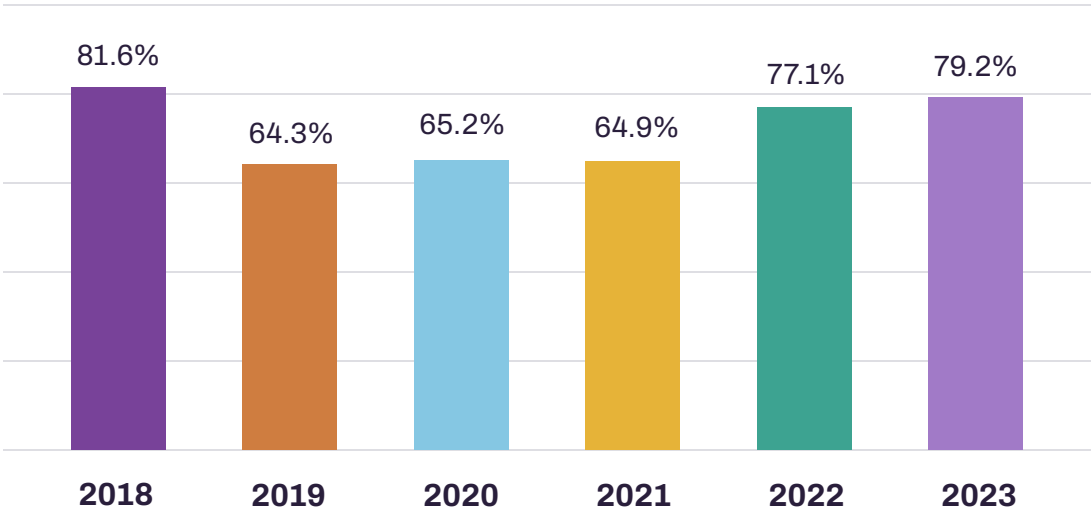
Professional Caregiver Turnover Rate

**To calculate your average number of professional caregivers employed during a year, take the sum of the number of professional caregivers employed at the end of one year (e.g. Dec. 2022) and at the end of the next year (e.g. Dec. 2023) and divide that number by 2.*

of Professional Caregivers employed (Dec. 2022) + # of Professional Caregivers employed (Dec. 2023) ÷ 2 = Avg. # of Professional Caregivers Employed

PROFESSIONAL CAREGIVER TURNOVER RATES

2.20 **Home Care** Historical Median Professional Caregiver Turnover Rate



Professional Caregiver Turnover Calculation

Professional Caregiver Turnover represents the percent of professional caregivers who quit or were terminated in 2023. Providers had to have been in business for at least one full year. Basic professional caregiver turnover is calculated by taking the **number of professional caregivers who quit or were terminated** in the year and dividing that number by the **average number of professional caregivers employed** in the same time period.

of Professional Caregivers Quit/Terminated

÷

Avg. # of Professional Caregivers Employed*

=

Professional Caregiver Turnover Rate

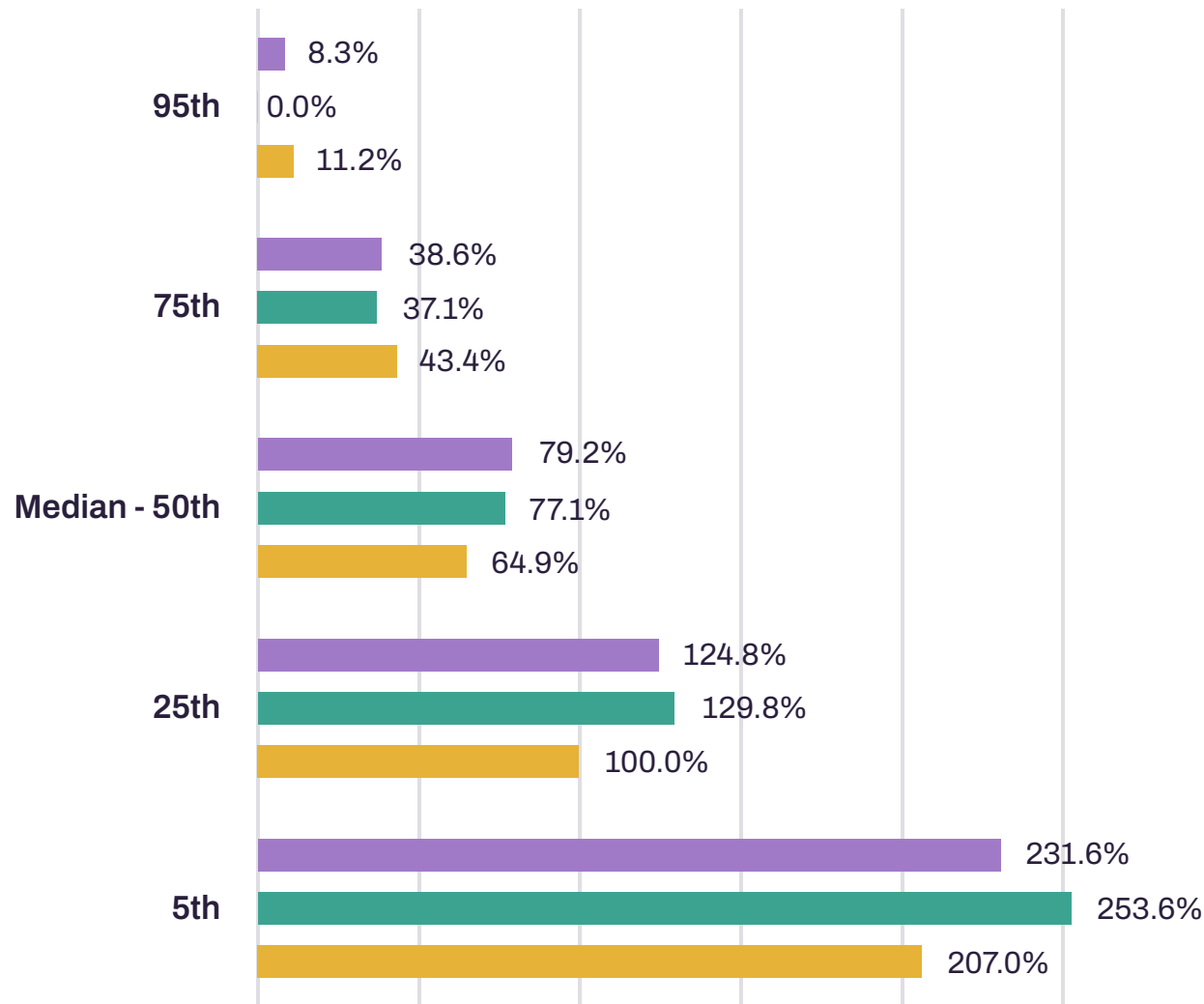
**To calculate your average number of professional caregivers employed during a year, take the sum of the number of professional caregivers employed at the end of one year (e.g. Dec. 2022) and at the end of the next year (e.g. Dec. 2023) and divide that number by 2.*

of Professional Caregivers employed (Dec. 2022) + # of Professional Caregivers employed (Dec. 2023) ÷ 2 = Avg. # of Professional Caregivers Employed



PROFESSIONAL CAREGIVER TURNOVER RATES

2.21 **Home Care** Historical Professional Caregiver Turnover Rate - Percentile Ranking



2023

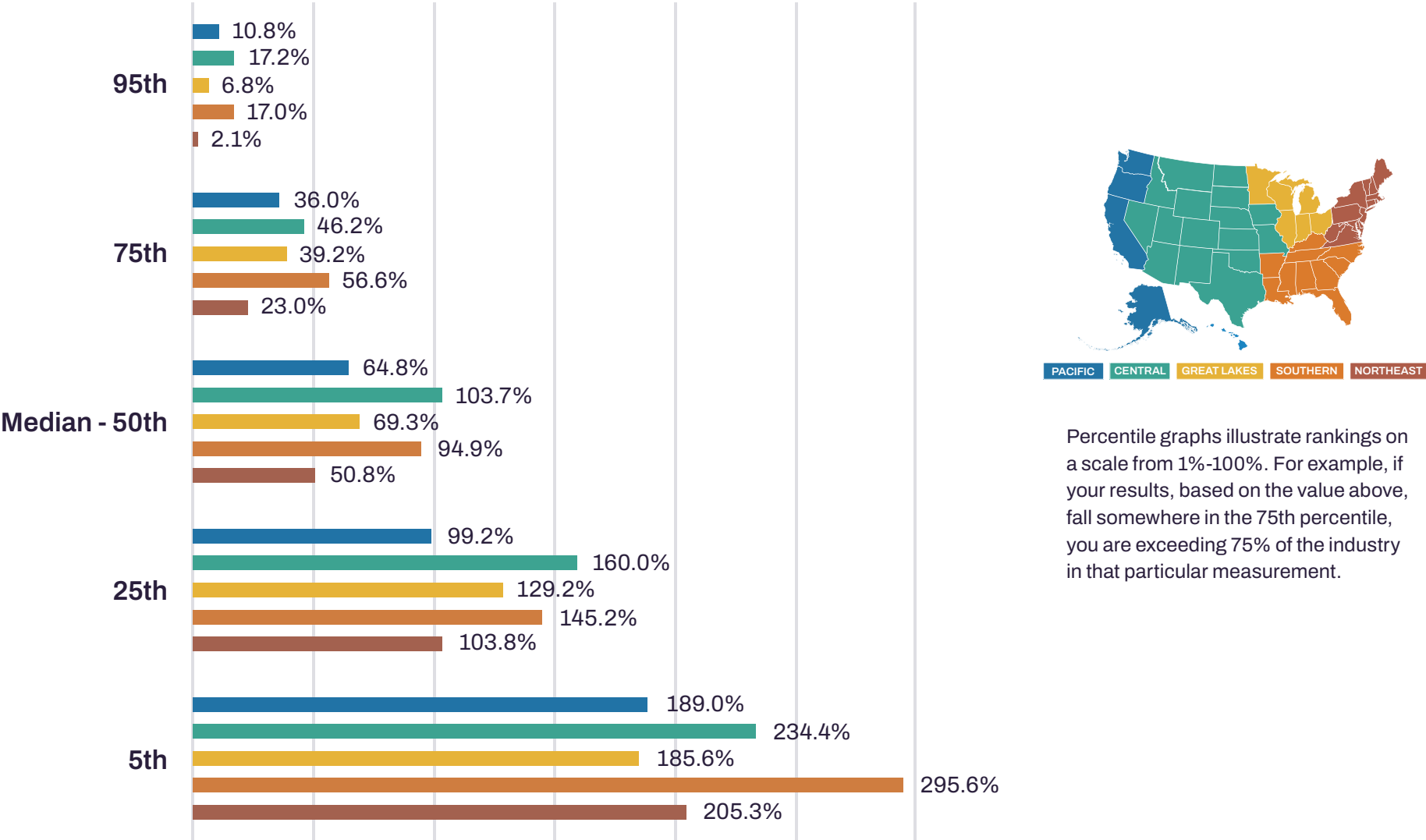
2022

2021

Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value on the right, fall somewhere in the 75th percentile, you are outperforming 75% of the industry in that particular measurement.

PROFESSIONAL CAREGIVER TURNOVER RATES

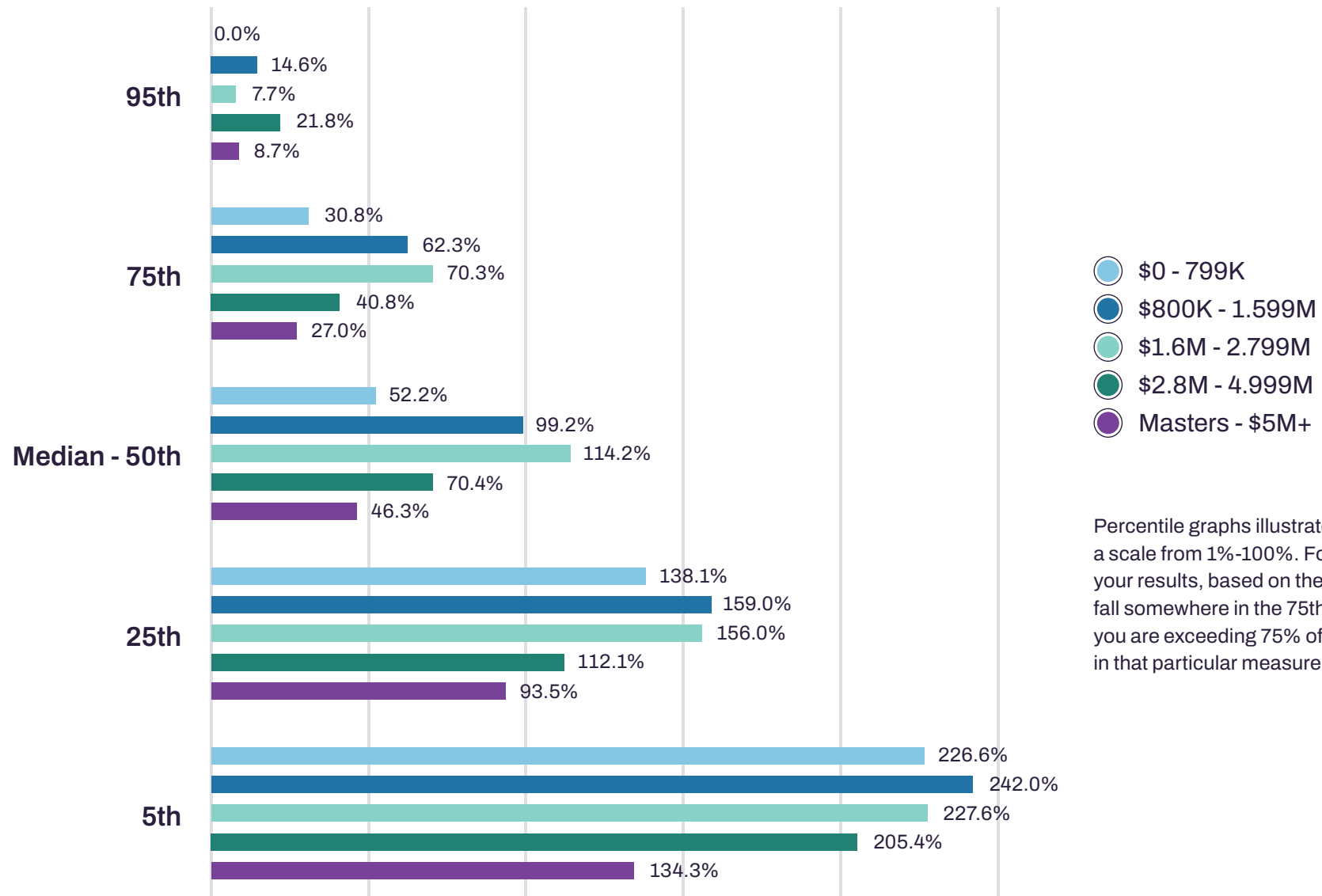
2.22 **Home Care** Professional Caregiver Turnover Rate by Percentile Ranking for 2023 - Geographic Region





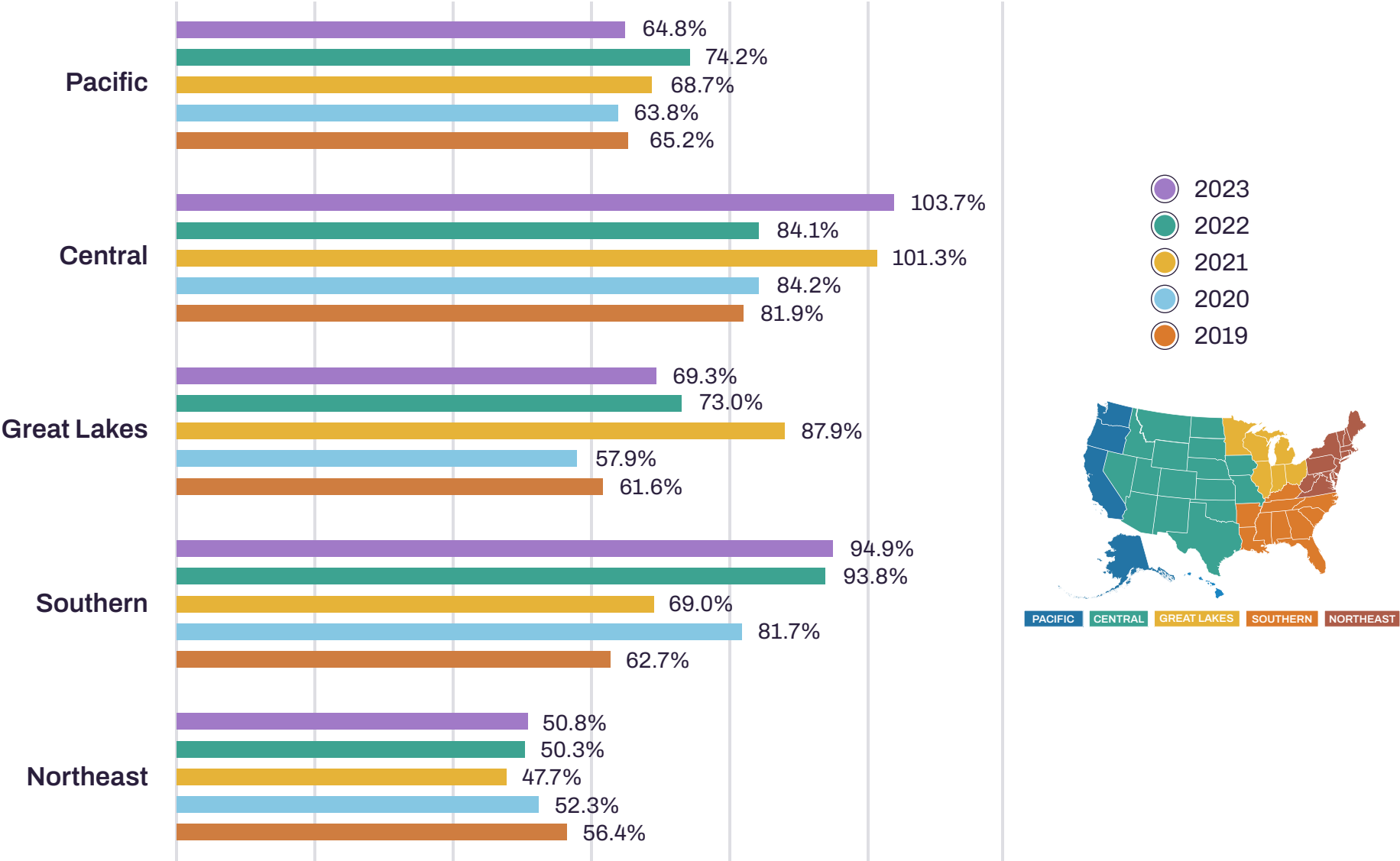
PROFESSIONAL CAREGIVER TURNOVER RATES

2.23 Home Care Professional Caregiver Turnover Rate for 2023 - Revenue Range



PROFESSIONAL CAREGIVER TURNOVER RATES

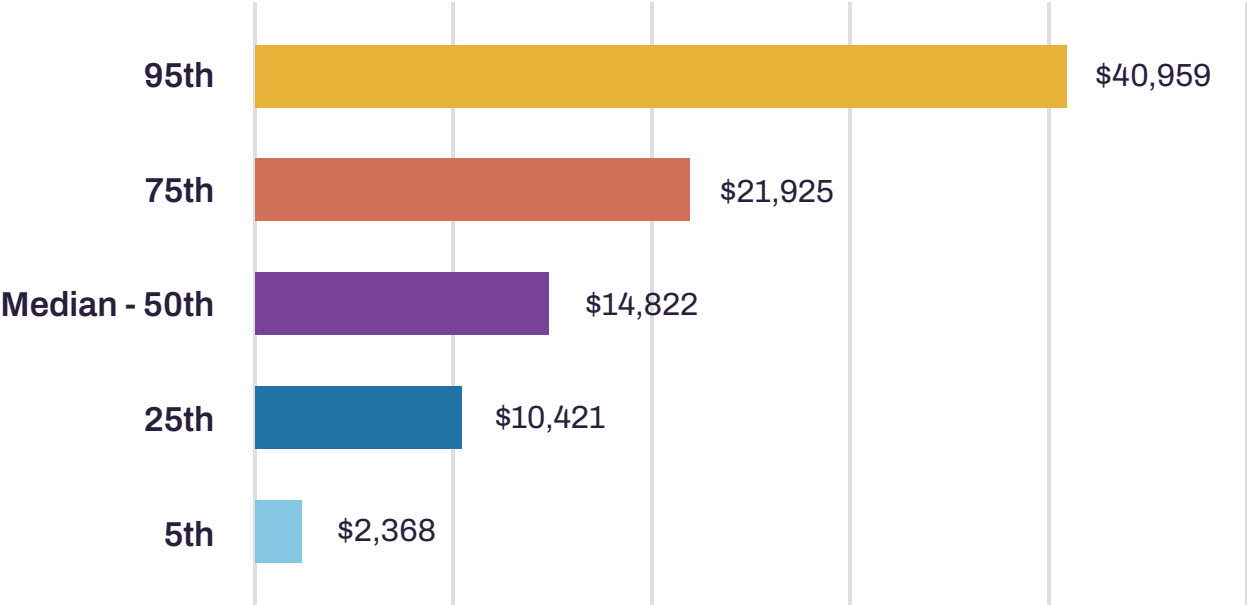
2.24 **Home Care** Historical Median Professional Caregiver Turnover Rate - Geographic Region





REVENUE PER PROFESSIONAL CAREGIVER EMPLOYEE

2.25 **Home Care** Revenue Per Professional Caregiver Employee for 2023 - Percentile Ranking



Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

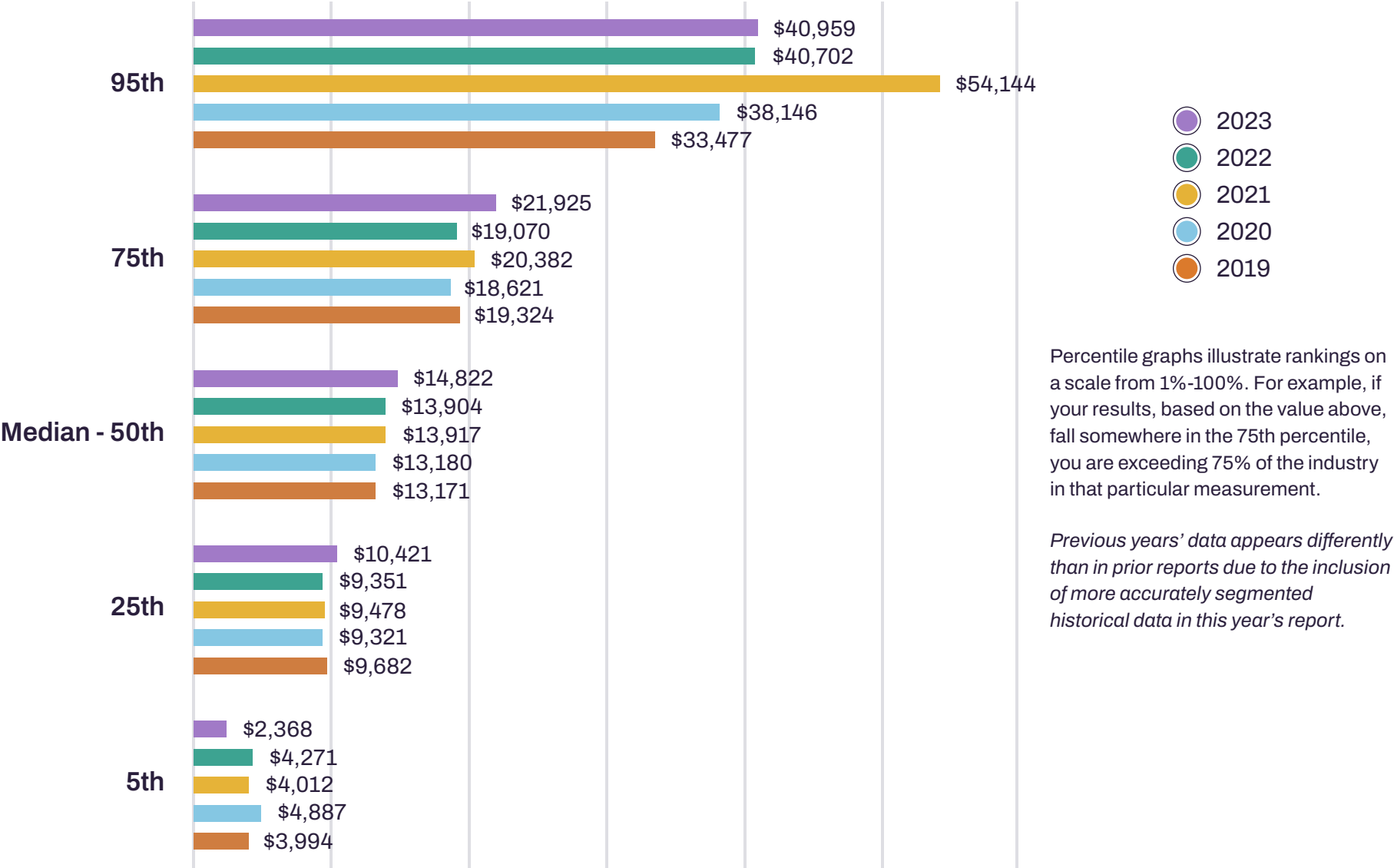
Revenue Per Professional Caregiver Employee Calculation

To calculate the Revenue Per Professional Caregiver Employee, divide your **annual revenue** by the **number of professional caregivers employed** in the same year.



REVENUE PER PROFESSIONAL CAREGIVER EMPLOYEE

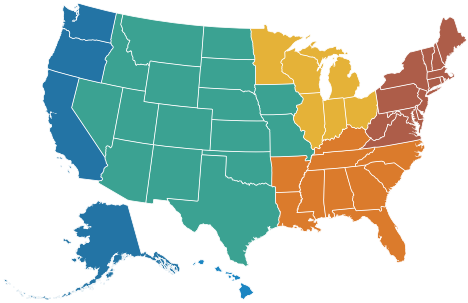
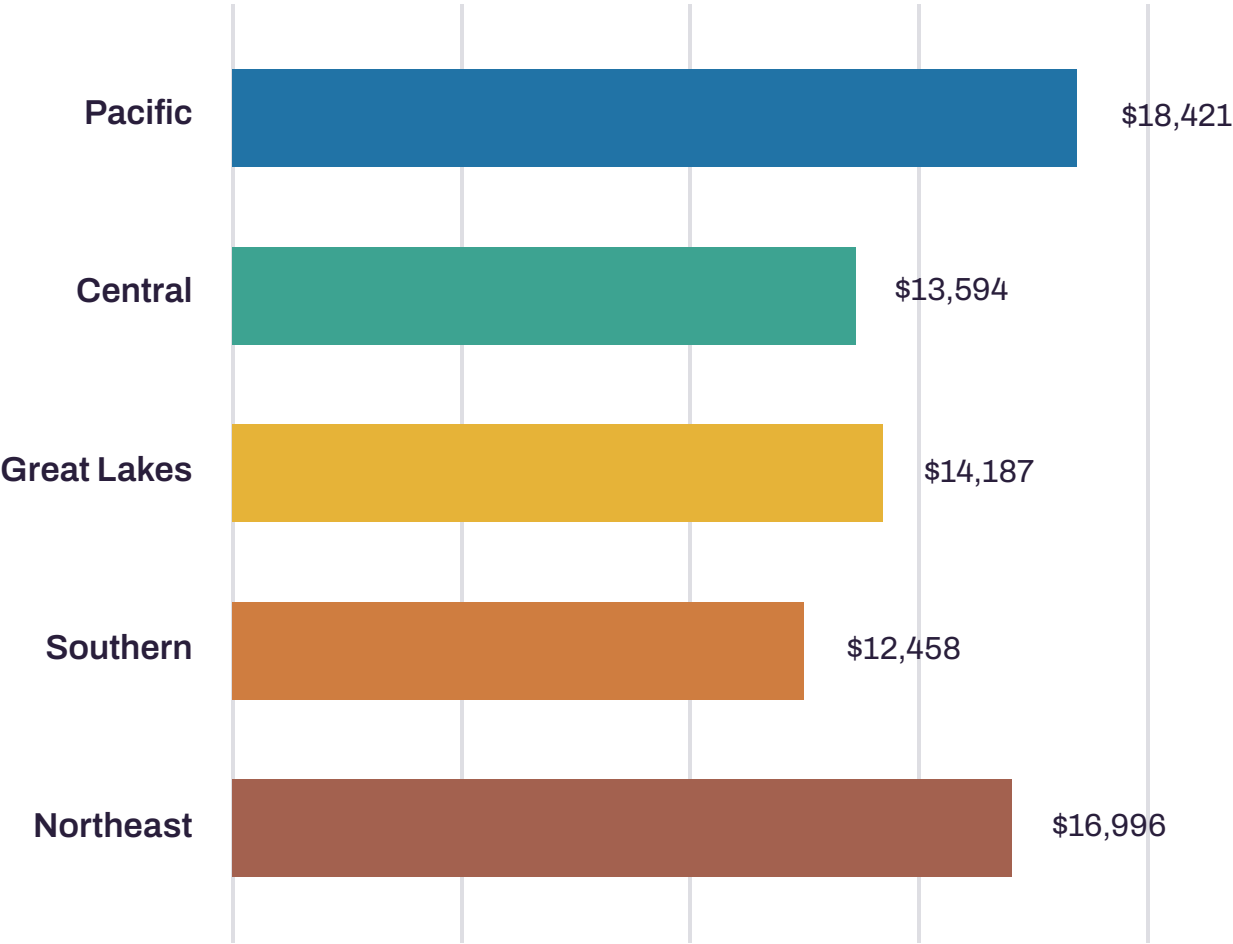
2.26 **Home Care** Historical Revenue Per Professional Caregiver Employee - Percentile Ranking





REVENUE PER PROFESSIONAL CAREGIVER EMPLOYEE

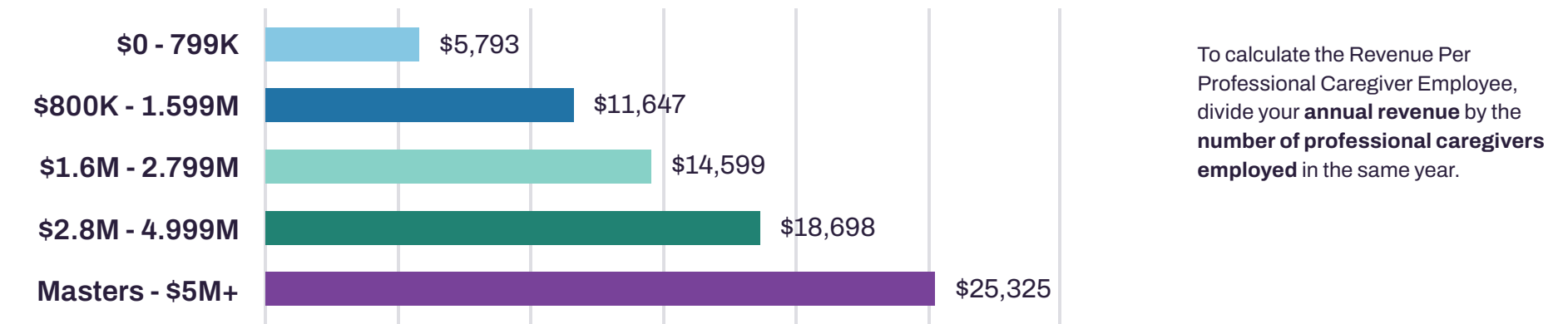
2.27 **Home Care** Median Revenue Per Professional Caregiver Employee for 2023 - Geographic Region



To calculate the Revenue Per Professional Caregiver Employee, divide your **annual revenue** by the **number of professional caregivers employed** in the same year.

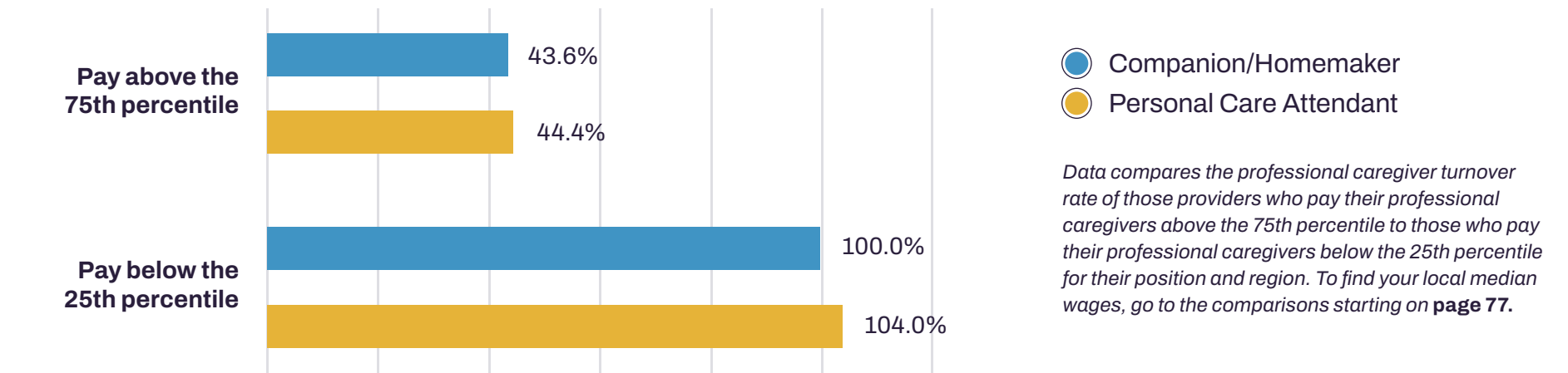
REVENUE PER PROFESSIONAL CAREGIVER EMPLOYEE

2.28 Home Care Median Revenue Per Professional Caregiver Employee for 2023 - Revenue Ranges



CARE STAFF WAGES

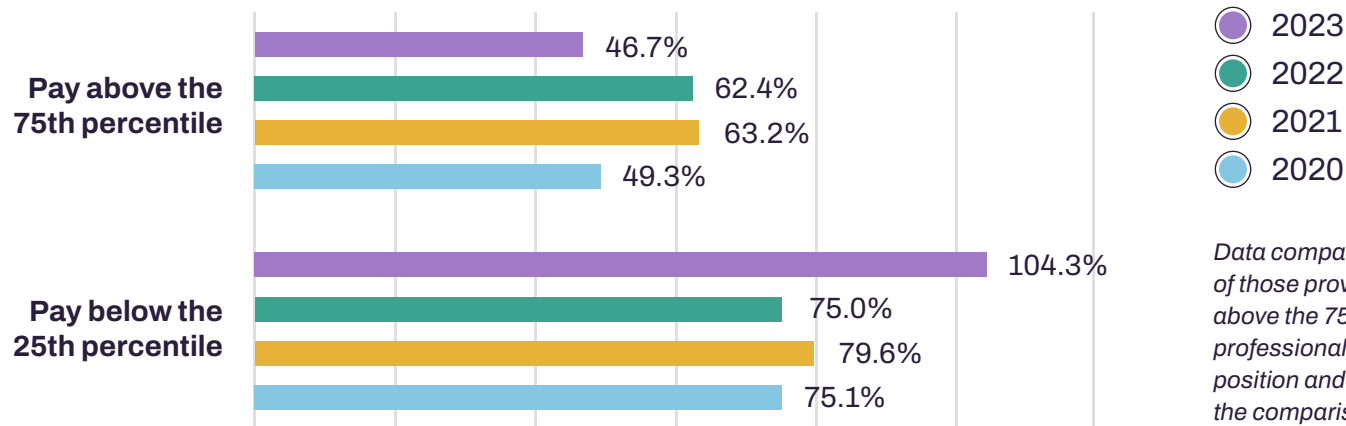
2.29 Home Care Median Turnover - Professional Caregiver Wages Comparison





CARE STAFF WAGES

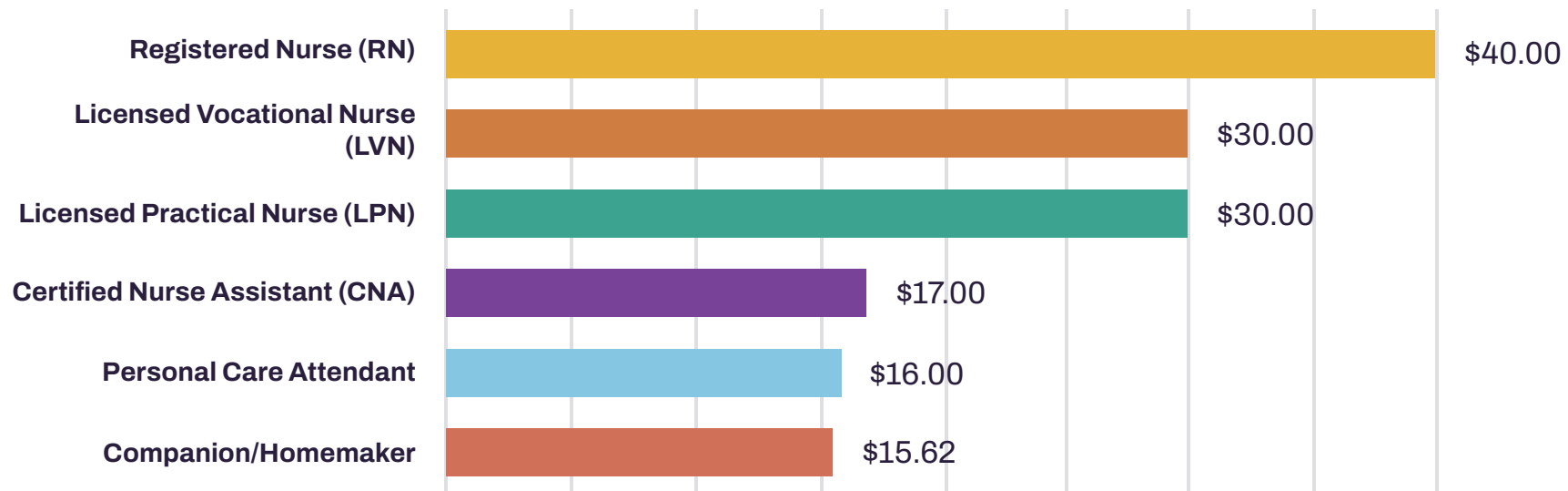
2.30 **Home Care** Historical Median Professional Caregiver Turnover - Professional Caregiver Wages Comparison



Data compares the professional caregiver turnover rate of those providers who pay their professional caregivers above the 75th percentile to those who pay their professional caregivers below the 25th percentile for their position and region. To find your local median wages, go to the comparisons starting on **page 77**.

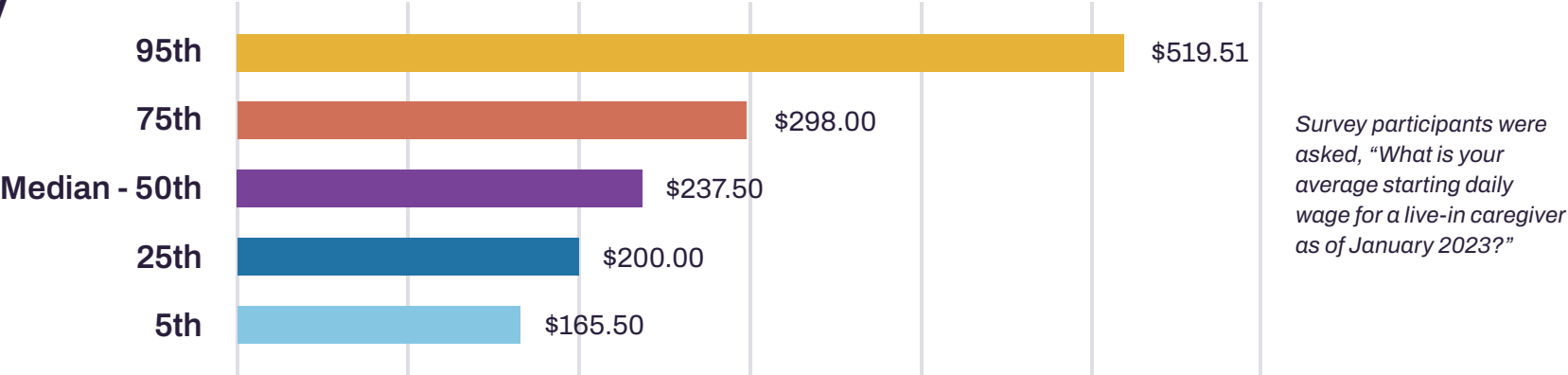
CARE STAFF WAGES

2.31 **Overall** Median Hourly Care Staff Wages by Role



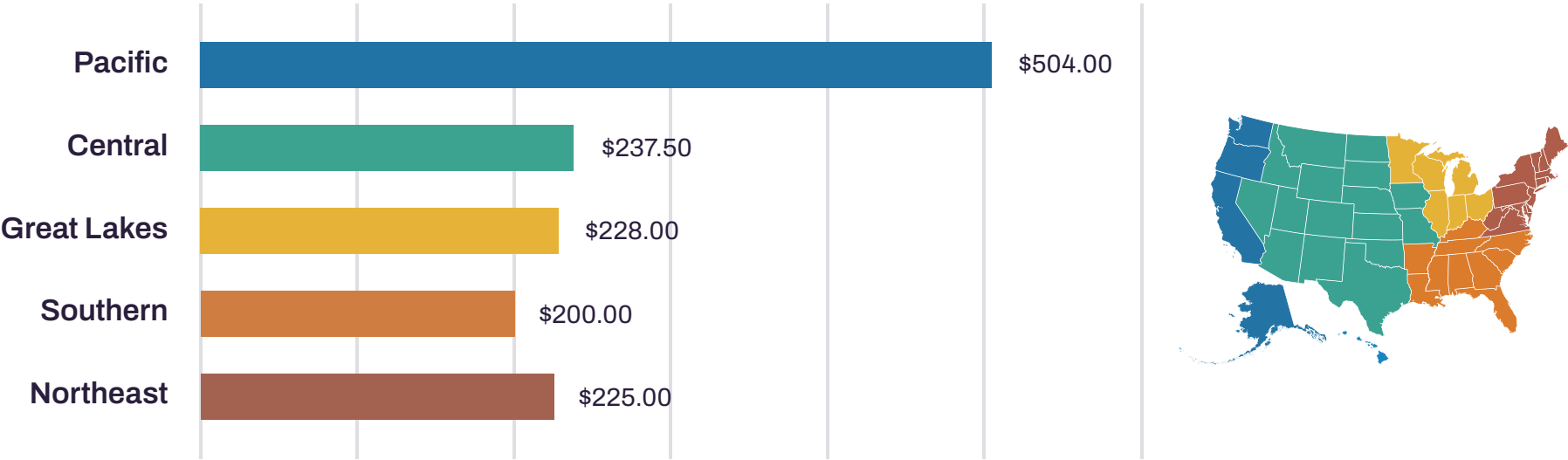
CARE STAFF WAGES

2.32 **Home Care** Live-In Professional Caregiver Wages per 24-Hour Shift for 2023 - Daily



CARE STAFF WAGES

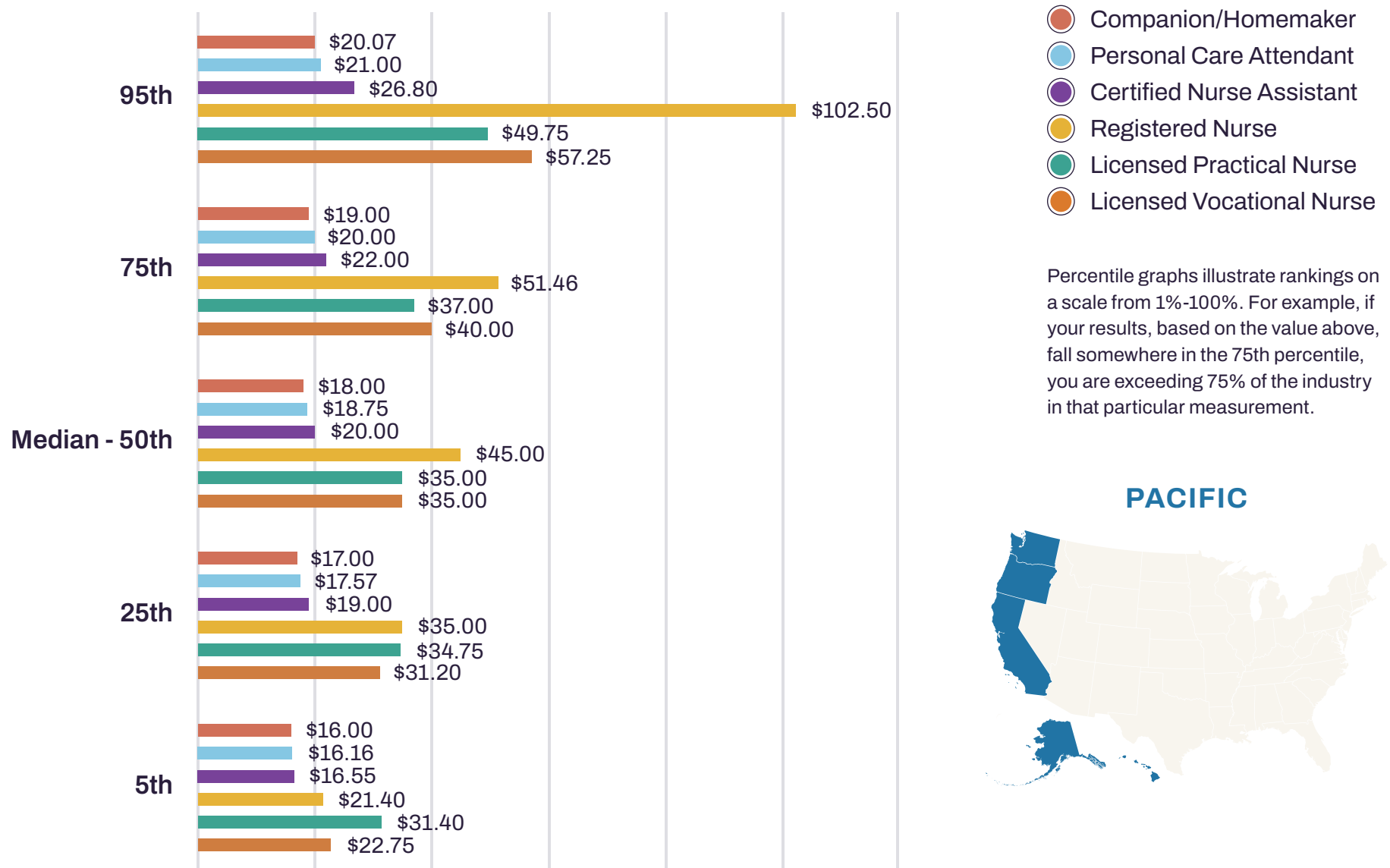
2.33 **Home Care** Live-In Professional Caregiver Wages per 24-Hour Shift for 2023 - Geographic Regions - Daily





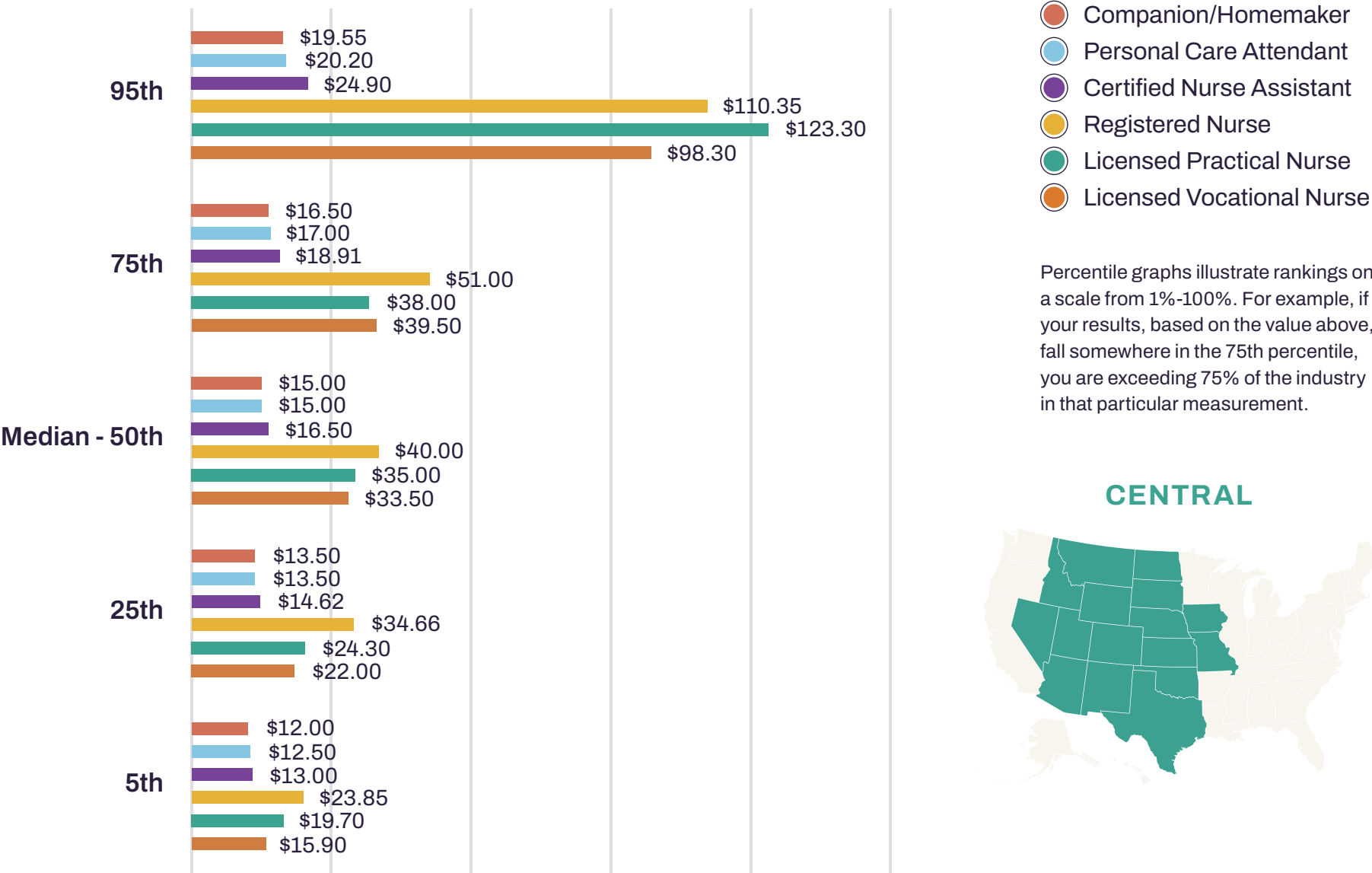
WAGES COMPARISON

2.34 Overall Wages by Geographical Region for 2023 - Pacific



WAGES COMPARISON

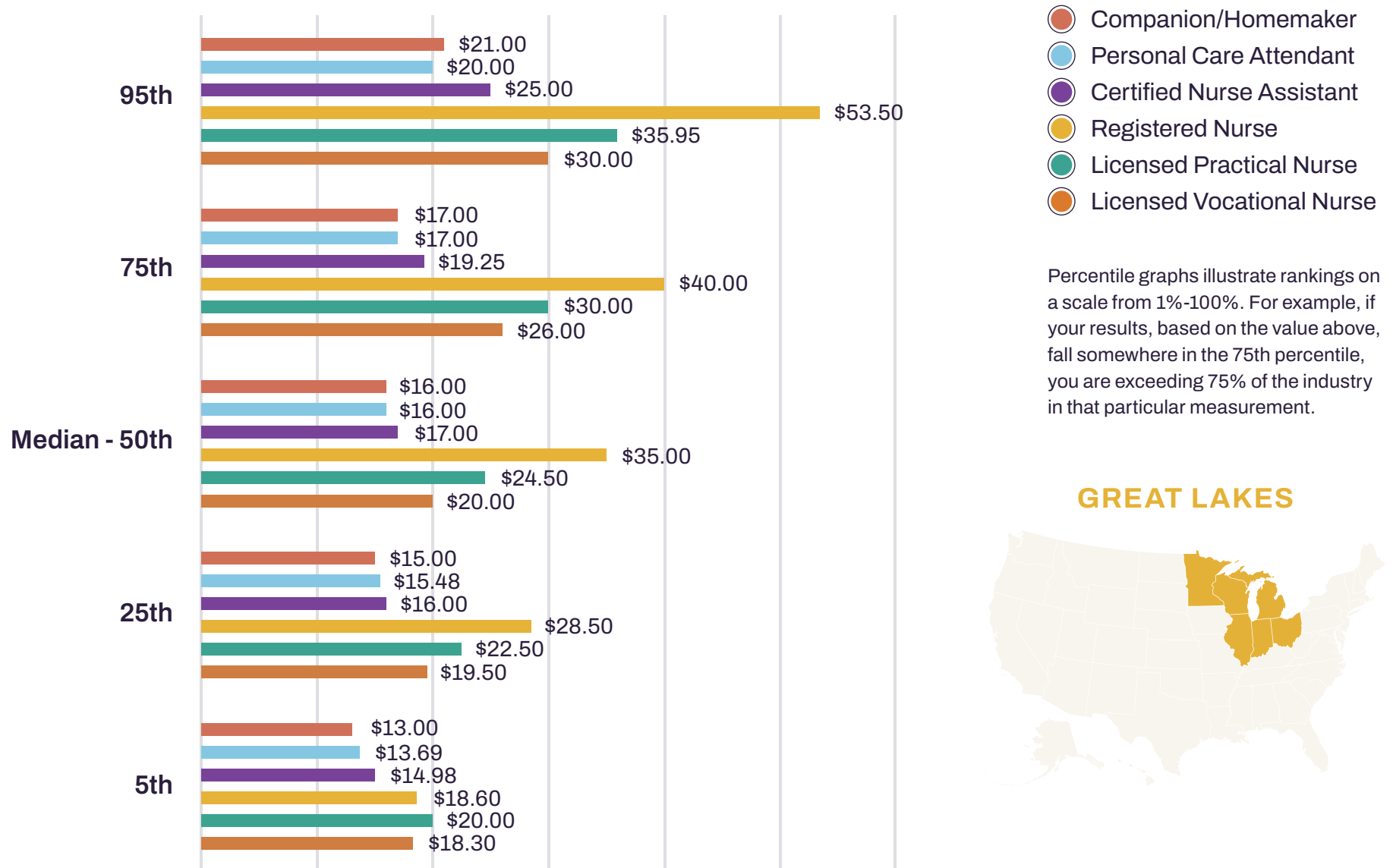
2.35 Overall Wages by Geographical Region for 2023 - Central





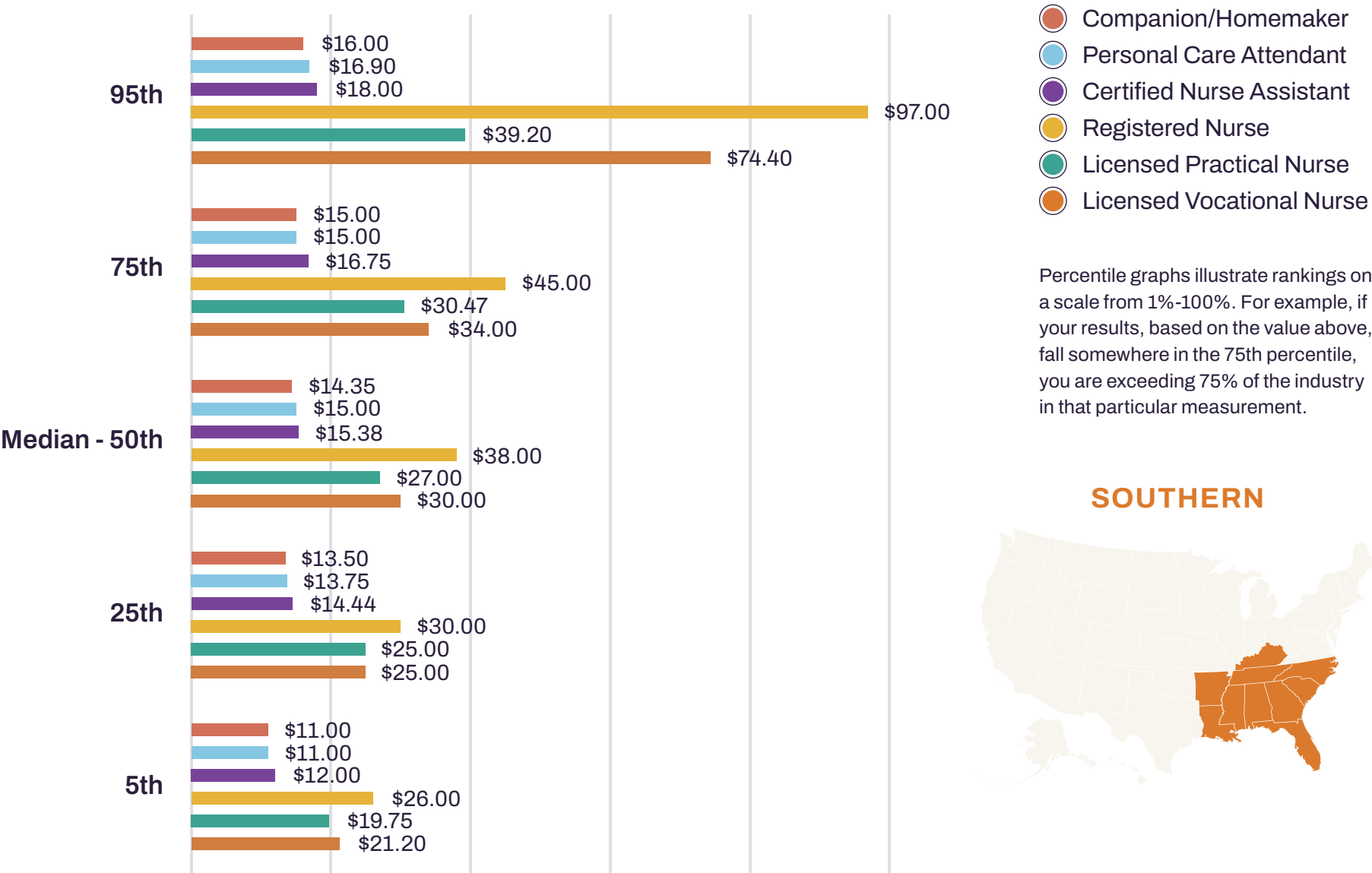
WAGES COMPARISON

2.36 Overall Wages by Geographical Region for 2023 - Great Lakes



WAGES COMPARISON

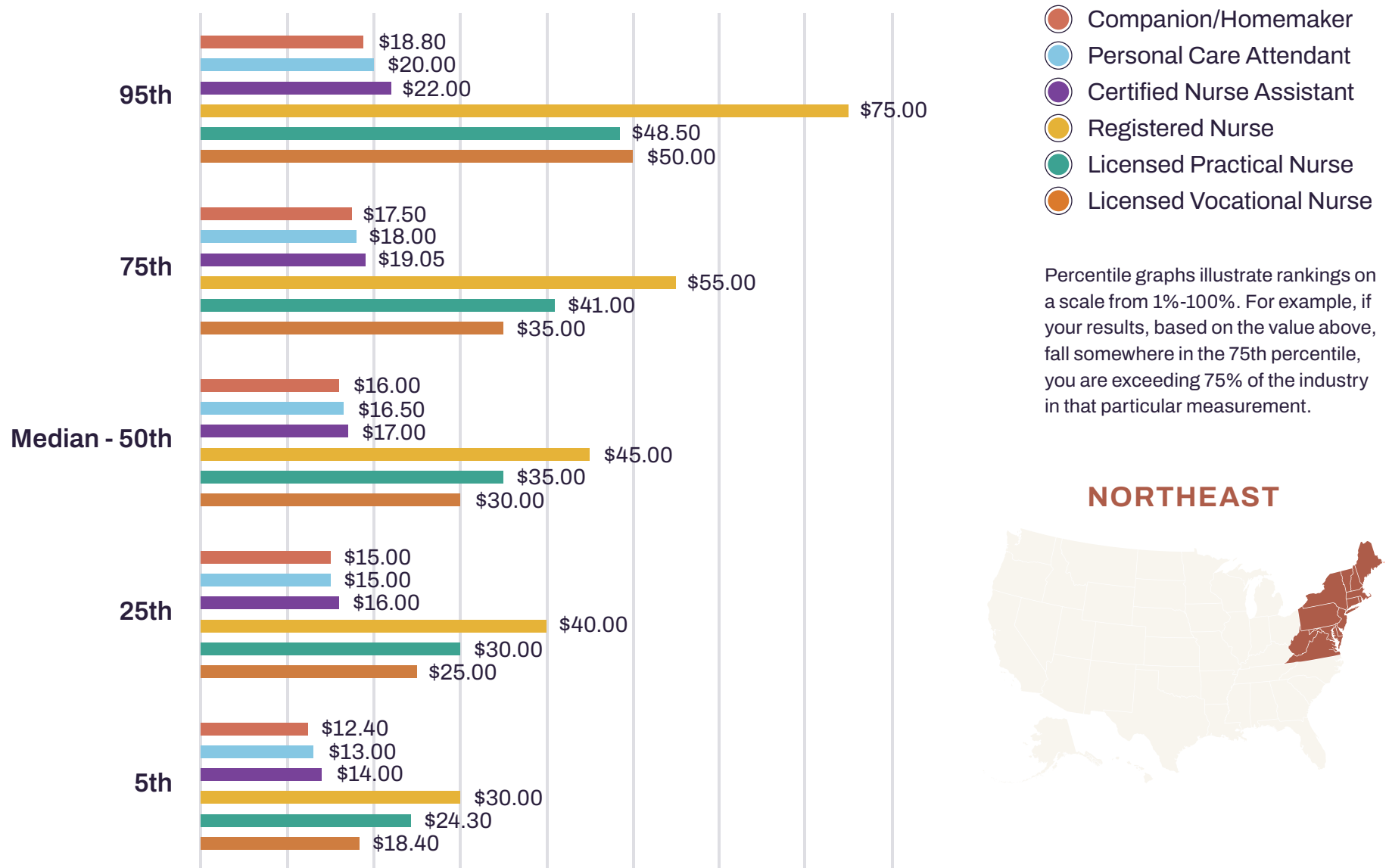
2.37 Overall Wages by Geographical Region for 2023 - Southern





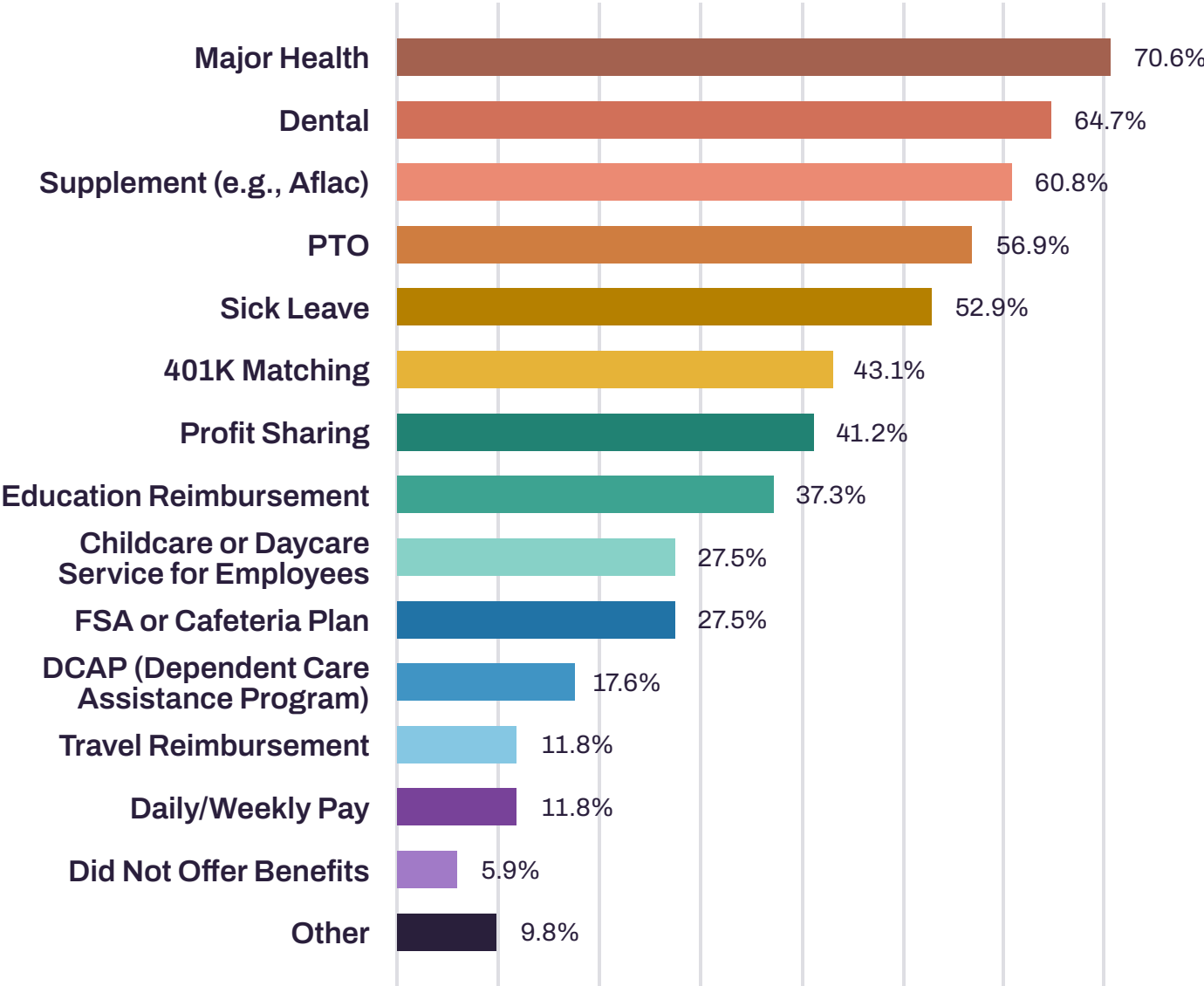
WAGES COMPARISON

2.38 Overall Wages by Geographical Region for 2023 - Northeast



CLINICIAN BENEFITS

2.39 **Home Health** **Hospice** Clinician Benefits Provided for 2023

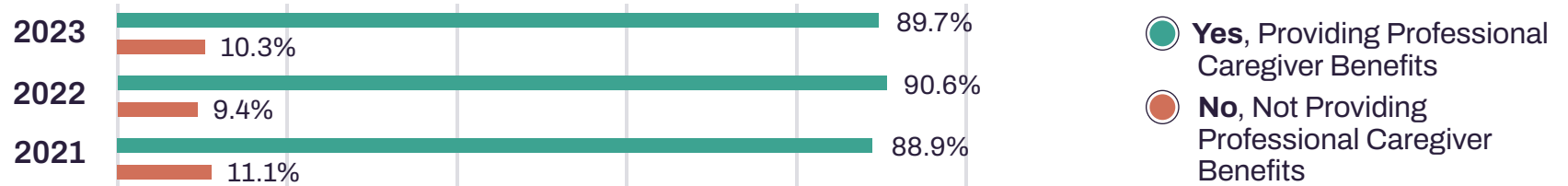


Survey participants were asked, "What types of benefits do you offer your full-time care professionals and office staff?"



PROFESSIONAL CAREGIVER BENEFITS

2.40 Home Care Historical Percentage of Agencies Providing Professional Caregiver Benefits



PROFESSIONAL CAREGIVER BENEFITS

2.41 Home Care Professional Caregiver Benefits Provided for 2023 - Overall & Revenue Ranges

Type of Benefit	\$0 - 799K	\$800K - 1.599M	\$1.6M - 2.799M	Leaders - \$2.8M - 4.999M	Masters - \$5M+	2023 Overall
Daily/Weekly Pay	30.5%	51.7%	56.9%	51.9%	63.8%	50.5%
PTO	39.0%	46.7%	52.3%	42.6%	59.6%	47.7%
Travel Reimbursement	37.3%	35.0%	49.2%	59.3%	55.3%	46.7%
Dental	18.6%	38.3%	38.5%	51.9%	74.5%	42.8%
Major Health	18.6%	25.0%	40.0%	53.7%	83.0%	42.1%
Supplement (i.e., Aflac)	15.3%	38.3%	38.5%	44.4%	57.4%	37.9%
401K Matching	18.6%	23.3%	40.0%	51.9%	53.2%	36.5%
Sick Leave	23.7%	28.3%	40.0%	38.9%	48.9%	35.4%
Education Reimbursement	16.9%	20.0%	18.5%	22.2%	29.8%	21.1%
Profit Sharing	8.5%	6.7%	1.5%	14.8%	6.4%	7.4%
FSA or Cafeteria Plan	10.2%	0.0%	6.2%	3.7%	8.5%	5.6%
Childcare or Daycare Service for Employee Benefits	8.5%	3.3%	1.5%	0.0%	0.0%	2.8%
DCAP (Depend Care Assistance Program)	5.1%	0.0%	1.5%	0.0%	2.1%	1.8%
Other	8.5%	11.7%	10.8%	9.3%	14.9%	10.9%

NUMBER OF PROFESSIONAL CAREGIVERS EMPLOYED

2.42

Home Care

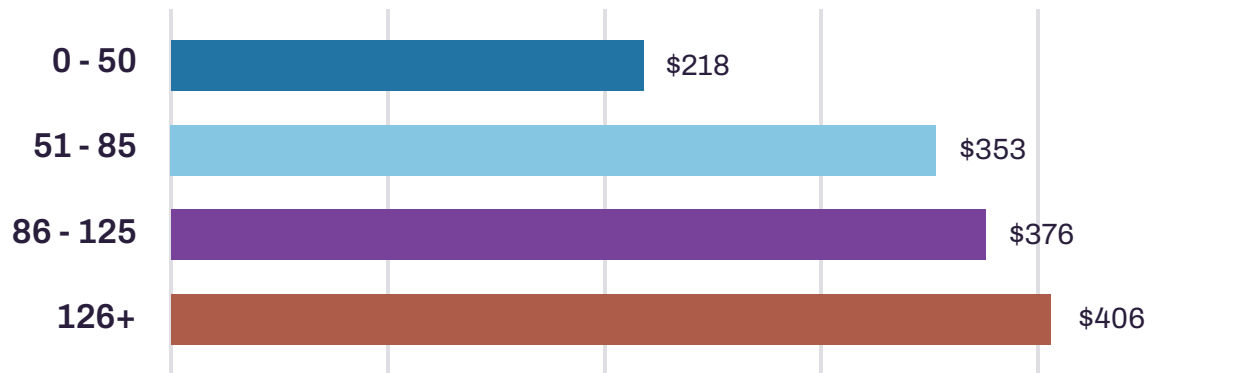
Professional Caregiver Benefits Provided for 2023 - Number of Professional Caregivers Employed

Type of Benefit	0 - 50	51 - 85	86 - 125	126+
Major Health	20.5%	42.0%	56.0%	6.7%
Dental	25.2%	45.7%	54.0%	6.8%
Supplement (i.e., Aflac)	26.0%	37.0%	38.0%	5.1%
PTO	41.7%	43.2%	50.0%	5.8%
Sick Leave	33.1%	38.3%	52.0%	3.9%
401K Matching	22.8%	33.3%	44.0%	5.7%
Profit Sharing	5.5%	4.9%	12.0%	1.2%
Education Reimbursement	21.3%	12.3%	24.0%	3.4%
Childcare or Daycare Service for Employee Benefits	3.9%	2.5%	2.0%	0.9%
FSA or Cafeteria Plan	3.9%	6.2%	6.0%	1.2%
DCAP (Depend Care Assistance Program)	3.1%	2.5%	2.0%	0.6%
Travel Reimbursement	41.7%	48.1%	50.0%	5.5%
Daily/Weekly Pay	38.6%	55.6%	56.0%	5.7%
Other	11.8%	8.6%	14.0%	1.8%



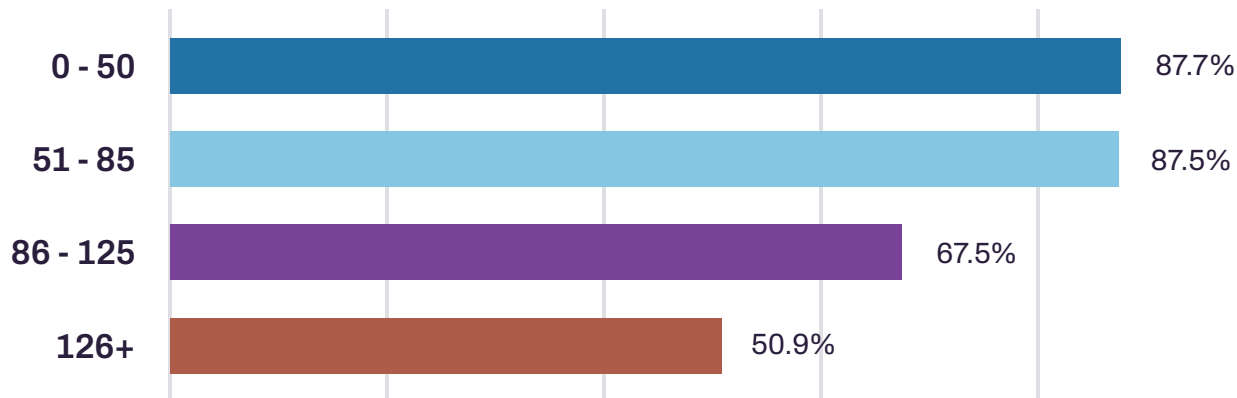
NUMBER OF PROFESSIONAL CAREGIVERS EMPLOYED

2.43 **Home Care** Median Professional Caregiver Acquisition Cost for 2023 - Number of Professional Caregivers Employed



NUMBER OF PROFESSIONAL CAREGIVERS EMPLOYED

2.44 **Home Care** Median Professional Caregiver Turnover Rate - Number of Care Professionals Employed



ARTICLE

Growth Without Overwhelm:

Turning Chaos Into Your Competitive Advantage



Clint and Jessica Nobles

Founder and CEO
Home Care Ops



“At the end of the day, being successful is about doing more of what is working and less of what isn’t.”

Have you ever had a goal that was really important to you and your business, yet despite its importance, the chaos of the day kept getting in the way? Home care owners frequently ask me how they can grow their business, develop their teams, and have a business that supports their lives without sacrificing everything they care about to make it happen.

The answers and strategies I share with them come from years of learning and decades of working with high-performing owners and operators at every level of growth. Achieving growth without overwhelm is not only possible; it’s predictable with the right formula.

Understanding the Rules of the Game

Winning at business isn’t just about who has the biggest budget, the legacy of a brand, or who you know. Winning, no matter the sport, is always decided by who leverages the time played better than the competition. It’s about being the champion of the seconds that matter most by being prepared, practiced, and committed to strategic actions for sustainable, repeatable success.



“The truth is you cannot make a right or wrong decision... you can only make the decision. The choice isn’t good or bad, **it’s the actions you take next that determine the outcome.**”

The Next Steps to Growth Without Overwhelm

Growth without overwhelm means knowing the next steps to take, which removes the mask of uncertainty often confused for overwhelm. Remember this: “Overwhelm is a mask for uncertainty.”

I remember the first time our business grew seven figures in nine months. Sure, we were happy, excited, and proud... but none of that was our first thought. When we ran the numbers at 12:01 a.m. on January 1st, Jessica looked up at me with teary eyes and sighed, “Was it worth it?”

If you just read that statement and instantly remembered your “was it worth it” moment and felt the same flush of exhaustion, then you are exactly where you need to be right now. Because I am about to share with you the proven framework I have honed in our business and have helped hundreds of owners and operators, just like you, build a business by design and create growth without overwhelm.

The Chaos Funnel

In three simple steps, you can gain more clarity and confidence in your next steps.

Step 1: Identify Your End Result

Outcomes are results, not achievements. The outcomes happening in your business right now are the result of systems and processes. Now, they might not be outcomes you like, but they are still the result of systems and processes. When you understand the power of

intentional outcomes, your business takes on a new life. Gone are the days of waking up having no idea what is going to happen. Instead, you know that regardless of what happens, your intentional outcome will be the driving force.

You might be asking yourself right now, “What makes an outcome intentional?” The answer can be summed up in two words: “End Results.”

When I teach owners to create intentional outcomes, it starts by first identifying what their end result is. What is the one thing that they have control over that simply must occur at the end of this project, day, quarter, etc.? Not something that relies on someone else’s choice or favor. That one unmovable outcome that takes skill, work, effort, or knowledge to make happen.

Step 2: Leverage the Known Variables

If I called you on the phone and gave you a 24/7 client, what is the first thing you would do? What if I called right

when you got everyone scheduled and gave you another one? Then another... then... are you feeling overwhelmed yet? Why? Is it because you “can’t handle it” or because you are out of people to call?

At the end of the day, being successful is about doing more of what is working and less of what isn’t. When you and your team are focused on an end result, it is important to ask: “What is helping us achieve...” and “what is hurting us from achieving...”

Once you have identified what in your business is helping you achieve the end result, you can leverage those things to align (or realign) your actions and support your business in being successful.

Step 3: Commit to Action

What are the skills, resources, training, daily actions, and habits that drive you toward your end result? This step is more about the leader than the team. As the owner or operator of your post-acute care business, how are you supporting your support staff in doing more of what’s working? Are you investing in technology, are you creating a culture of learning, are you a champion of quick-wins that build confidence in the person and the process?



At a recent two-day, in-person training event we host for members of our coaching program, The Action Leader Experience, one owner asked me: “How do I know the decision I am making is the right one?”

My answer was simple: “You know it’s the right one because it’s the one you made.”

So often we make decisions and then instantly question if they were right or wrong. The truth is you cannot make a right or wrong decision... you can only make the decision. The choice isn’t good or bad, it’s the actions you take next that determine the outcome.

Have you ever made a decision that seemed like it was wrong at the moment, but then, out of nowhere, you pulled victory from the mouth of defeat and achieved more than you ever thought possible?



That is why understanding this framework is so important in the life and legacy of a post-acute care owner. This framework helps you make intelligent decisions based on fact not faith. It helps you turn chaos into a catalyst and leverage what is working in your business to help you achieve your intentional outcomes. The more intentional outcomes you achieve, the more your business can grow.

Transforming Chaos Into Your Competitive Advantage

Remember, chaos isn’t the enemy of growth. With the right framework, like the Chaos Funnel, chaos becomes a powerful force to leverage towards achieving your outcomes. It’s about turning potential overwhelm into a structured path to success.

And the Next Step Is...

You now have a framework for growth without overwhelm to transform your operational chaos into a competitive advantage. The next step feels natural: applying what you’ve learned to address areas of overwhelm in your business.

Earlier, we talked about winning the seconds that matter most. The Chaos Funnel gives you power to make decisions based on intentional outcomes, and you can leverage this power to drive the five gears of operations in your business. This is how wins turn into streaks, and streaks turn into dynasties. To download The Chaos Funnel Workbook, simply go to www.homecareops.com and start turning chaos into your competitive advantage today. 

ABOUT THE AUTHORS

Recognized as the Power-Couple of Home Care, Clint and Jessica Nobles are the industry’s leading business operations coaches and growth experts for home care owners. They have created one of the largest networks of home care owners and operators in the industry.

As experienced home care owners themselves, Clint and Jessica drew from their decades of expertise as entrepreneurs and executive leadership to bootstrap their own agency from the ground up into a multi-state, multi-million dollar business.

Now, as the founders of Home Care Ops, Clint and Jessica help home care owners to simplify their operations so they can increase profit, reduce their workload, and grow their business without overwhelm.

Connect with them directly or get plugged into their home care owner’s network at HomeCareOps.com.

ARTICLE

Differentiating Your Business by Boosting Satisfaction:

5 Ways To Pull It Off in Long-Term & Post-Acute Care



Paul Janes

Content Marketing Manager
Activated Insights



Differentiation is the name of the game when it comes to business success. But how do you differentiate your long-term and post-acute care business from a very crowded field? Marketing campaigns, social media presence, and even facility upkeep can drive short-term wins. But for lasting separation that drives sustained growth and success, customer and employee satisfaction are linchpins.

High satisfaction ensures you retain the customers and employees you currently have, generate referrals for new ones, and put you on the path to award-winning performance—all of which set you apart as a provider.

But what are the keys to unlocking these doors to differentiation? We reviewed data from more than 18,000 monthly surveys and came up with five data-driven

best practices to boost employee and/or customer satisfaction while simultaneously helping you stand out from the crowd.

5 Ways to Improve Satisfaction and Differentiate Your Long-Term and Post-Acute Care Business

1. Focus on the first 100 days

Why the first 100 days?

Activated Insights research shows that nearly 40% of all new hires leave within the first 100 days on the job. And that number isn't showing signs of improving. In fact, according to the 2023 HCP Benchmarking Report



(BMR), turnover spiked 12% to a staggering 77.1% annual rate in the last year after staying steady for the previous three.

This is why it's critical to immediately gather, evaluate, and act on employee feedback, then continue doing so through their first 100 days. We recommend 15 days, 30 days, 60 days, and 90 days.

Opening the lines of communication, encouraging employees to provide feedback, actively listening to or monitoring that feedback, and quickly acting on it are major satisfaction drivers. Doing this at the beginning of a person's tenure with your company tells them they can expect to continue enjoying the same satisfactory experience, thus distinguishing you as an employer of choice.

2. Pave a path to career success with compliance and specialty training

Reciprocity is extremely powerful. A large portion of the public are driven by a need (or at least a desire) to repay a good deed. Putting your employees on a path to greater success through career advancement is a lever you can pull to trigger this desire to reciprocate by staying with the employer that made it possible.

Compliance and specialty training both enable employees to advance their careers and improve current performance.

While training for compliance is the first step, data from the 2023 HCP Benchmarking Report also shows that those who offer five additional hours of training (orientation & ongoing) in home care, or eight additional hours for home health and hospice, differentiate the providers who aren't impacted by staffing shortages from those who are extremely impacted.

On average, home-based care agencies that offer at least eight orientation hours and 12 ongoing hours of training, increased revenue by \$681,672. So, ask your employees what they wish they knew and get them the training to make their wishes come true. They'll likely repay you in kind by remaining on your staff and encouraging their peers to join them.

“There’s arguably **no greater sign of satisfaction** than for your employees to direct their peers to seek out your openings, or for patients and family members to recommend you to others in need of care.”

3. Earn referrals from employees and customers

There's arguably no greater sign of satisfaction than for your employees to direct their peers to seek out your openings, or for patients and family members to recommend you to others in need of care.

According to the 2023 HCP Benchmarking Report, past and current customer referrals are the top marketing source with the lowest turnover rate for home care, home health, and hospice. Referral marketing generates more than 1/3 of all revenue.

Generating positive reviews—especially online where they're highly visible—is a must for your [differentiation strategy](#). Word-of-mouth referrals may be the crème de la crème for trustworthiness, but online reviews and ratings are often the first source a potential customer or job candidate turns to when seeking out a product, service, or employer.

According to research from [Zippia](#), 93% of people say reading online reviews has affected their buying decisions and 81% of people read online reviews before visiting a business in person.

[LinkedIn data](#) shows that nearly 3/4 of all candidates research a company before applying.

Needless to say, a [strong online reputation](#) carries a lot of weight when people compare you to the competition.



4. Collect, inspect, and respond to feedback

Poor or inadequate communication from providers has been a top complaint among employees and customers for years.

Great communication (and resulting satisfaction) starts with listening, and soars when you respond. Survey your employees and customers, put their feedback under the microscope, and respond quickly to enhance engagement and build a stronger relationship.

Activated Insights research shows that responding to just one comment in an employee survey reduces the likelihood of turnover by 65%. And, according to the 2023 HCP Benchmarking Report, providers who gather and act on customer feedback retain those customers 20% longer.

Better communication leads to happier employees and customers. Happier employees and customers lead to differentiation through positive reviews, more referrals, and award-worthy performance.



5. Set award-winning standards

If automobile manufacturers have taught us anything, it's that awards influence the masses. Try to find a car or truck commercial that doesn't tout a JD Power award or similar accolade. The long-term and post-acute care industry isn't any different when it comes to the power of awards. But that power extends beyond its positive impact on a patient, resident, or family member shopping for care providers.

Going after industry accolades creates a sense of purpose among employees that supercharges their engagement levels. Even when additional work is required to qualify for, or achieve the recognition, the sense of purpose and satisfaction derived from operating at an award-winning level often outweighs the extra output required to do so.

A study by AHCA and Pinnacle Quality Insight on the correlation between awards and satisfaction levels revealed that employee satisfaction and engagement spikes significantly in the year leading up to winning a National Quality Award when extra work and higher performance would typically be required.

Once an award is achieved, it's essential to recognize the people who made it possible and celebrate the success. Staff recognition and appreciation received the lowest satisfaction score among employees in the 2023 HCP Benchmarking Report. Celebrate your staff publicly to make them feel appreciated and watch their satisfaction levels skyrocket.

Finally, don't be modest about your accomplishment. Spread the word to the public via advertising, social media

channels, and in press releases to assert your company as the best of the best; doing so can sway uncertain customers and job candidates in your direction.

Where to start?

The first step towards differentiating your business through higher customer and employee satisfaction is knowing where you currently stand. Measure your satisfaction survey data to establish a baseline and use one or all the aforementioned tactics to start climbing from there. If you need a tool to help with either, [reach out to an Activated Insights Solutions Specialist](#) who can recommend the perfect product. 📌

ABOUT THE AUTHOR

Paul Janes is Content Marketing Manager at Activated Insights. He has more than 15 years of experience in copywriting, marketing, and journalism. Paul has spearheaded highly successful marketing and communications campaigns for nationally recognized brands, including Vision Service Plan, Trifecta Nutrition, Pinnacle Quality Insight, and Activated Insights. His writing has been published by USA Today, ABC News, and Yahoo, as well as various industry publications.



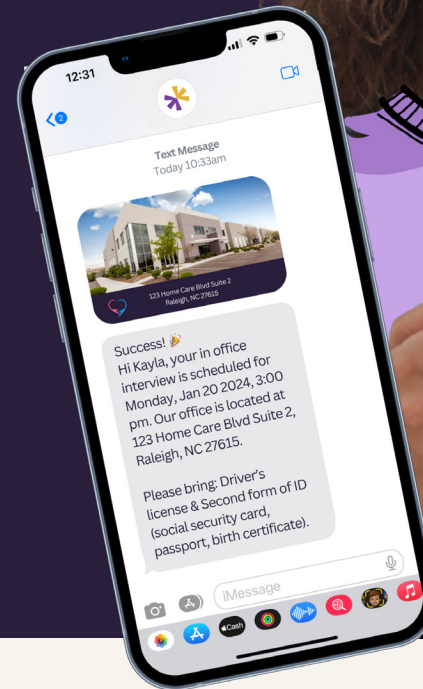
Accelerate Your Hiring Process & Boost Caregiver Retention

A two-pronged approach for staffing success.

The post-acute care industry ranks among the five worst for employee turnover. Fortunately, you have two tools to turn the tide in your favor. **Recruit** allows you to connect, qualify, and interview top candidates faster than humanly possible, and **Retain** keeps your finger on their pulse to ensure they stick around for the long haul.

Explore Recruit

Explore Retain



Take the first step on your path to staffing success and sustainability today.

Explore Recruit (activatedinsights.com/recruit) and Retain (activatedinsights.com/retain)

SUMMARY

Training

Inadequate training continues to be one of the most frequent complaints from employees who work in the long-term and post-acute care industry. With that in mind, this section is designed to help you evaluate your training program compared to your peers as you uncover areas for improvement. The following information is catered to help you drive compliance, reverse turnover, and improve overall care outcomes.

Section Contents

- 94** Training Type Used
- 100** Professional Training Programs
- 102** Training Hours
- 109** Training Topics
- 111** Continuing Education
- 111** Patient-Centered Care
- 112** Training Plan
- 112** Career Ladder
- 113** Care Staff Preparation

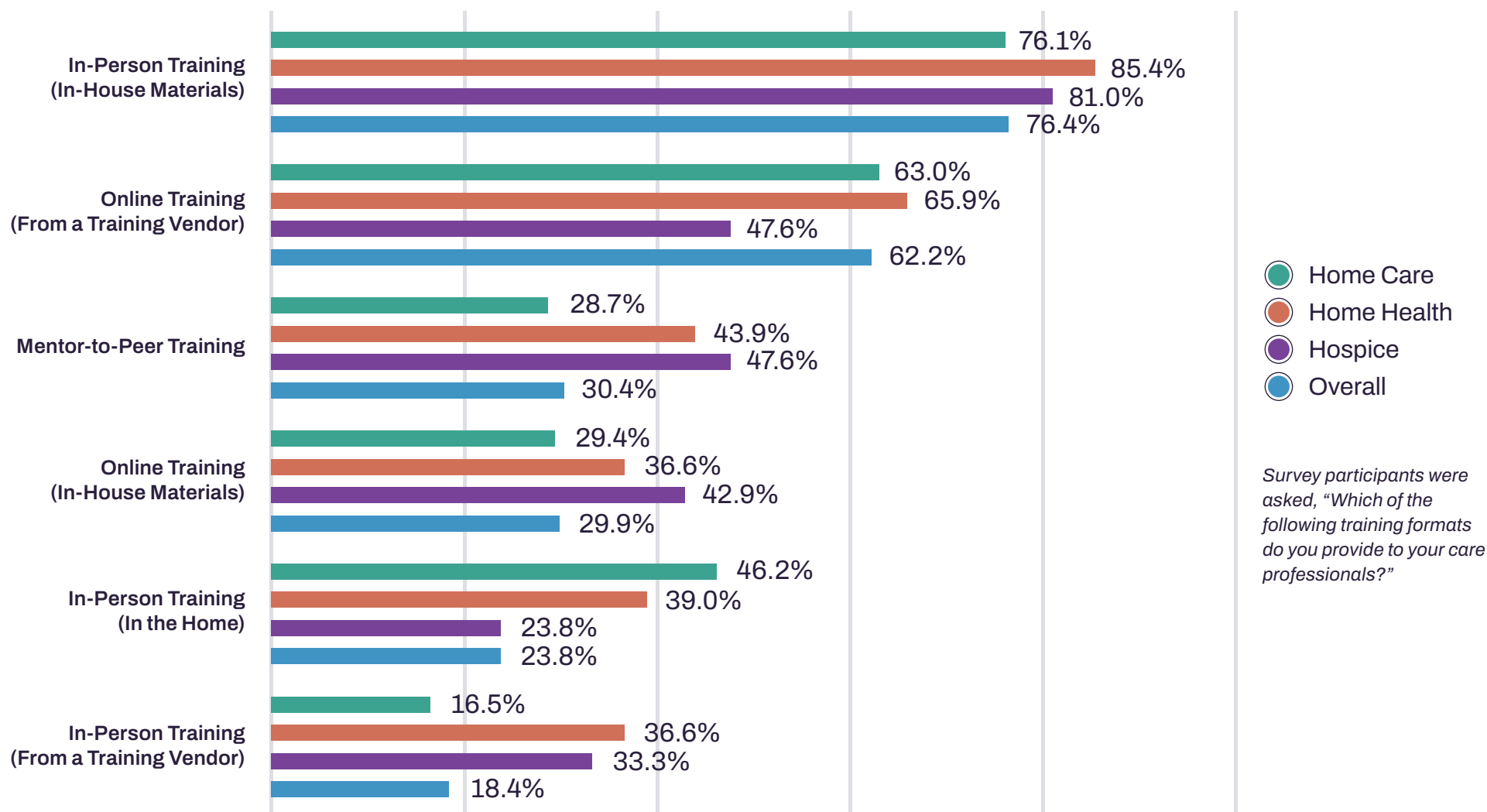
ARTICLES

- 115** *End-of-Life Training is Essential To Every Employee—Even Office Staff*
- 117** *Why ADLs Aren't Enough—How To Pave Enhanced Career Pathways That Lead Your Employees Toward Success*



TRAINING TYPE USED

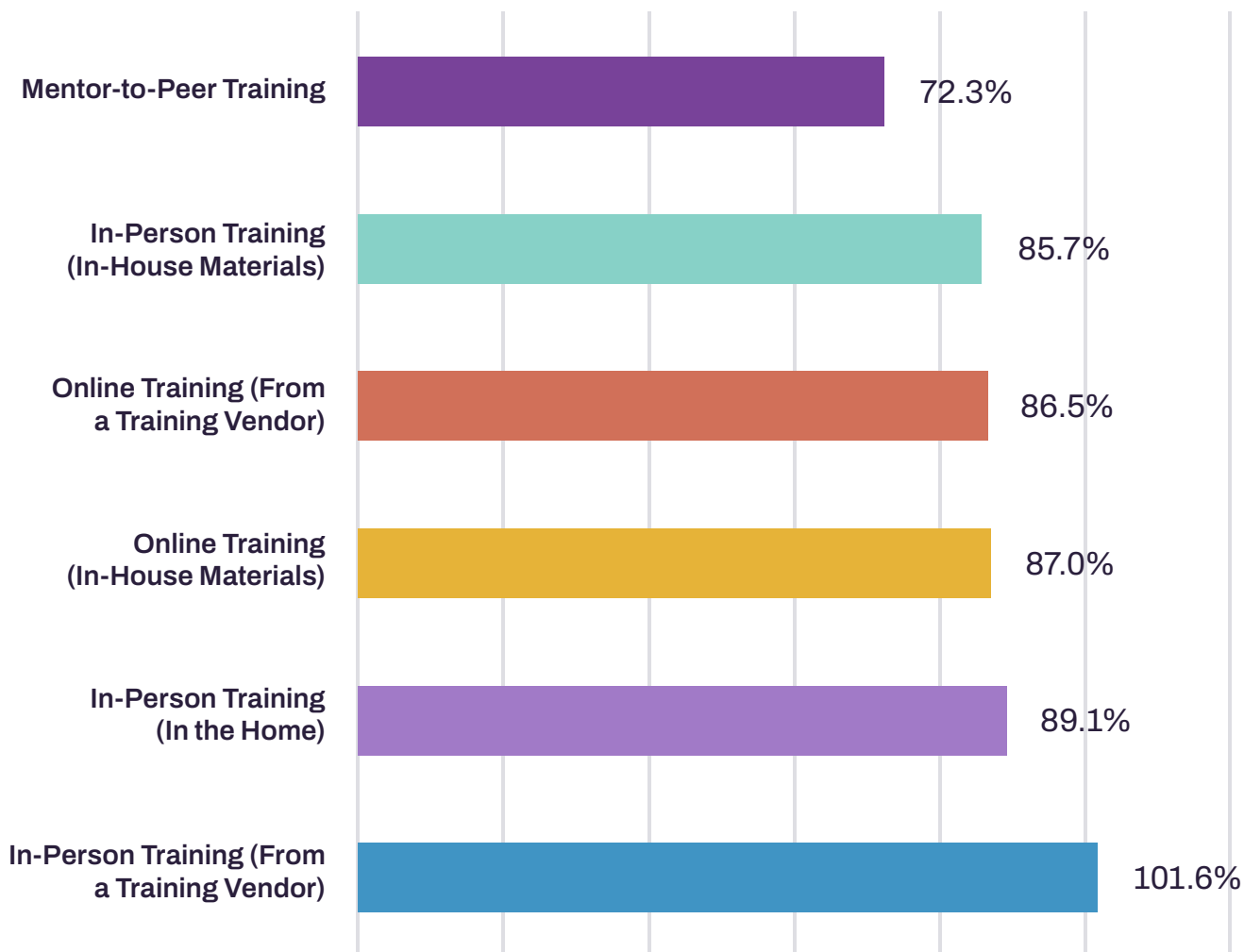
3.1 Overall Training Type Used in 2023 - Line of Business





TRAINING TYPE USED

3.2 **Home Care** Median Professional Caregiver Turnover Rate - Training Type Used in 2023



Online learning has revolutionized professional caregiver training, but there will always be times when instructor-led training is the way to go. With blended learning, you're prepared to offer both.

Blended learning includes options for both online and in-service training and is:

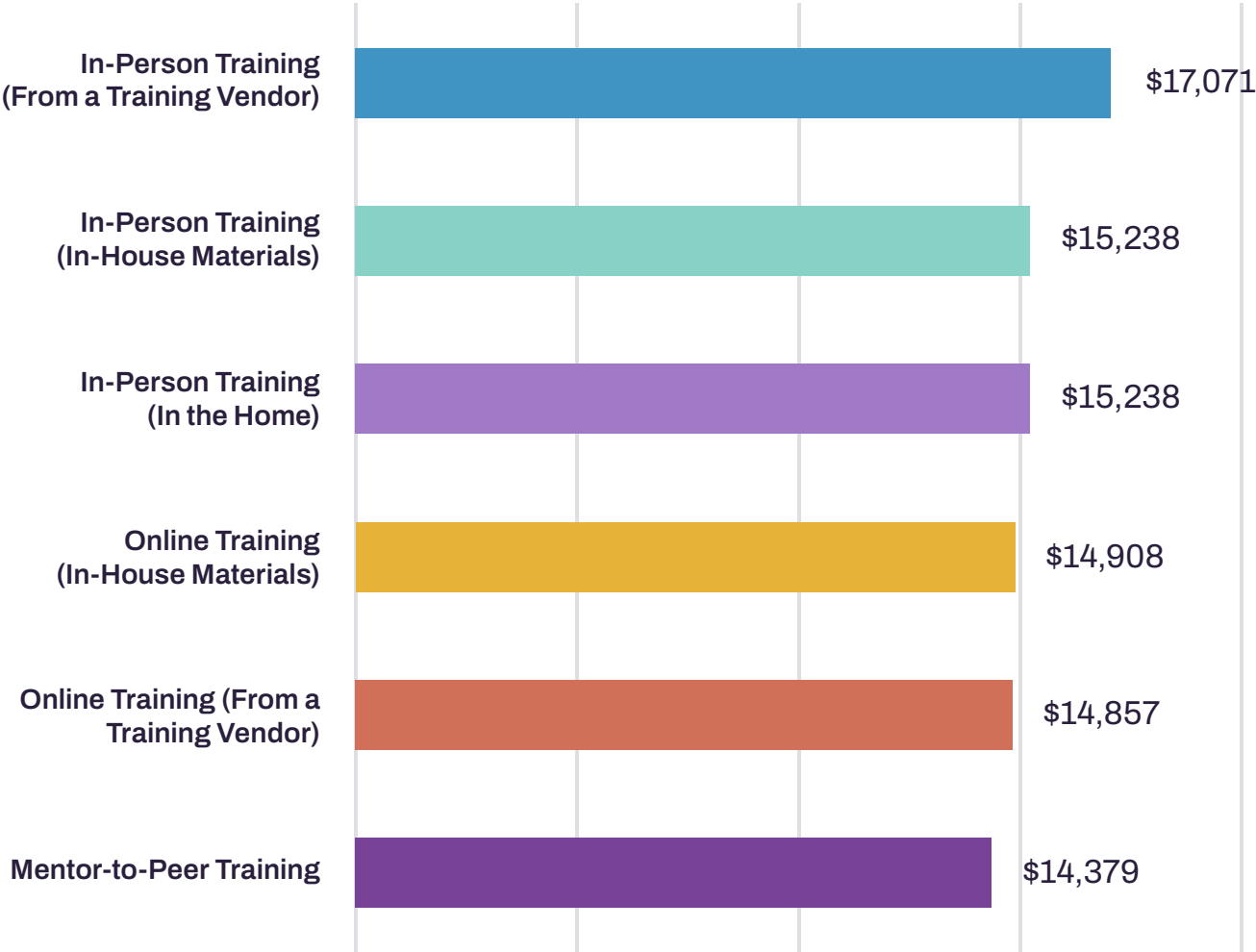
- More engaging for learners
- Preferred by professional caregivers and CNAs
- Proven by research to be more effective
- Only available through Activated Insights

See **page 119** to learn more about blended learning with Activated Insights Training.



TRAINING TYPE USED

3.3 **Home Care** Median Revenue Per Professional Caregiver Employee - Training Type Used in 2023



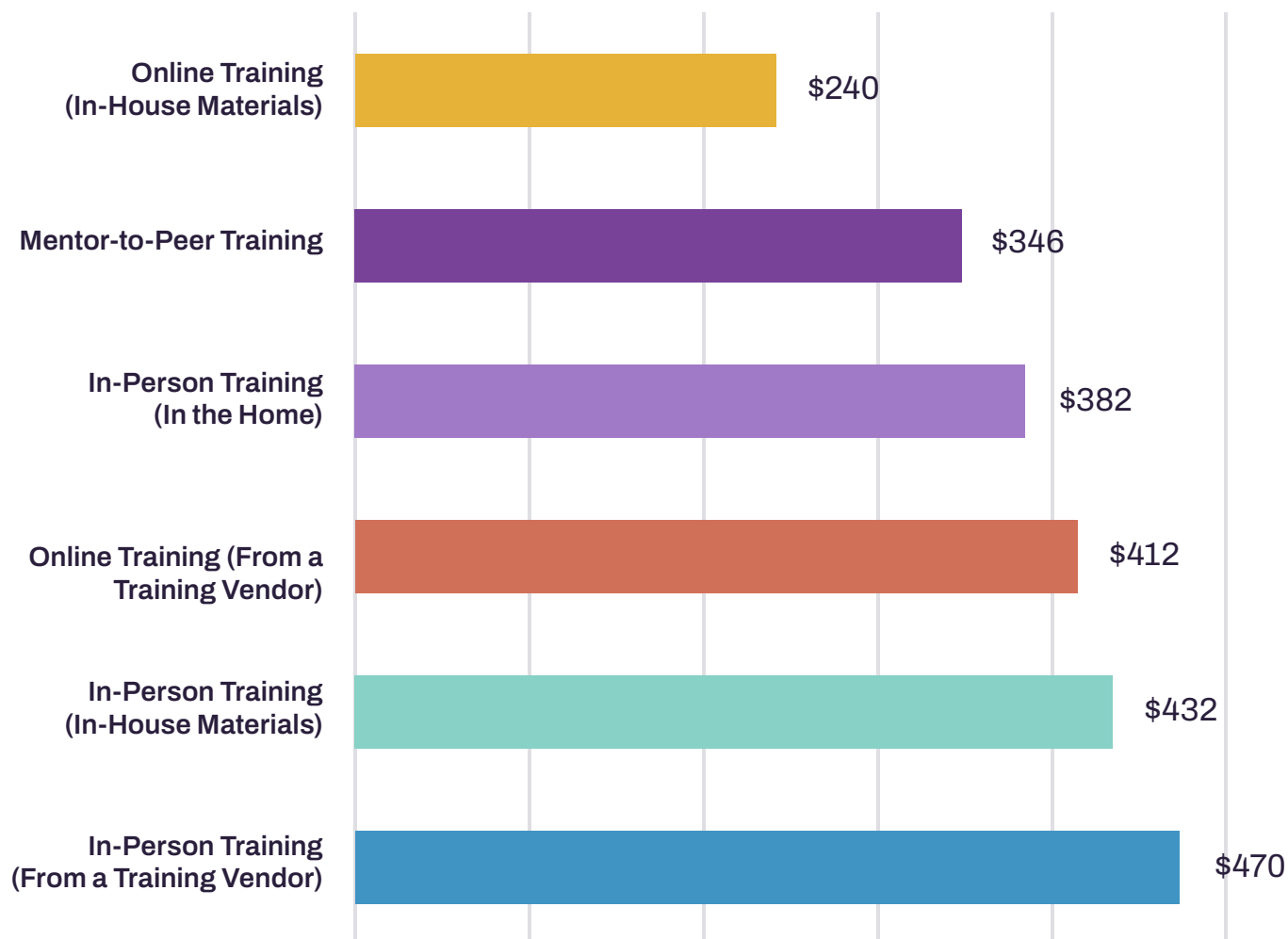
To calculate the Revenue Per Professional Caregiver, divide your **annual revenue** by the **number of care professionals employed** in the same year.

See **page 8** for a definition of Revenue Per Professional Caregiver Employee Calculation.



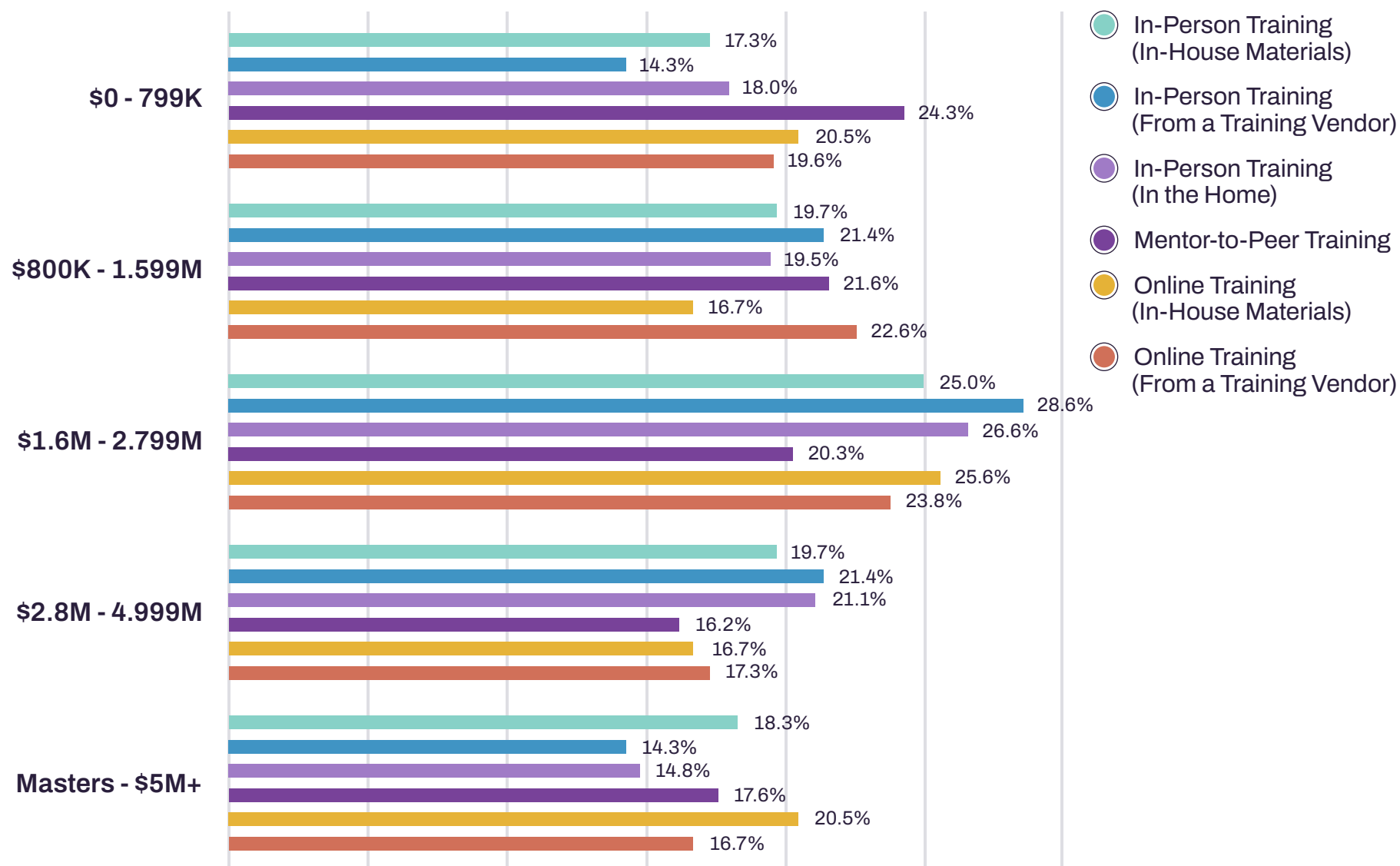
TRAINING TYPE USED

3.4 **Home Care** Median Professional Caregiver Acquisition Cost - Training Type Used in 2023





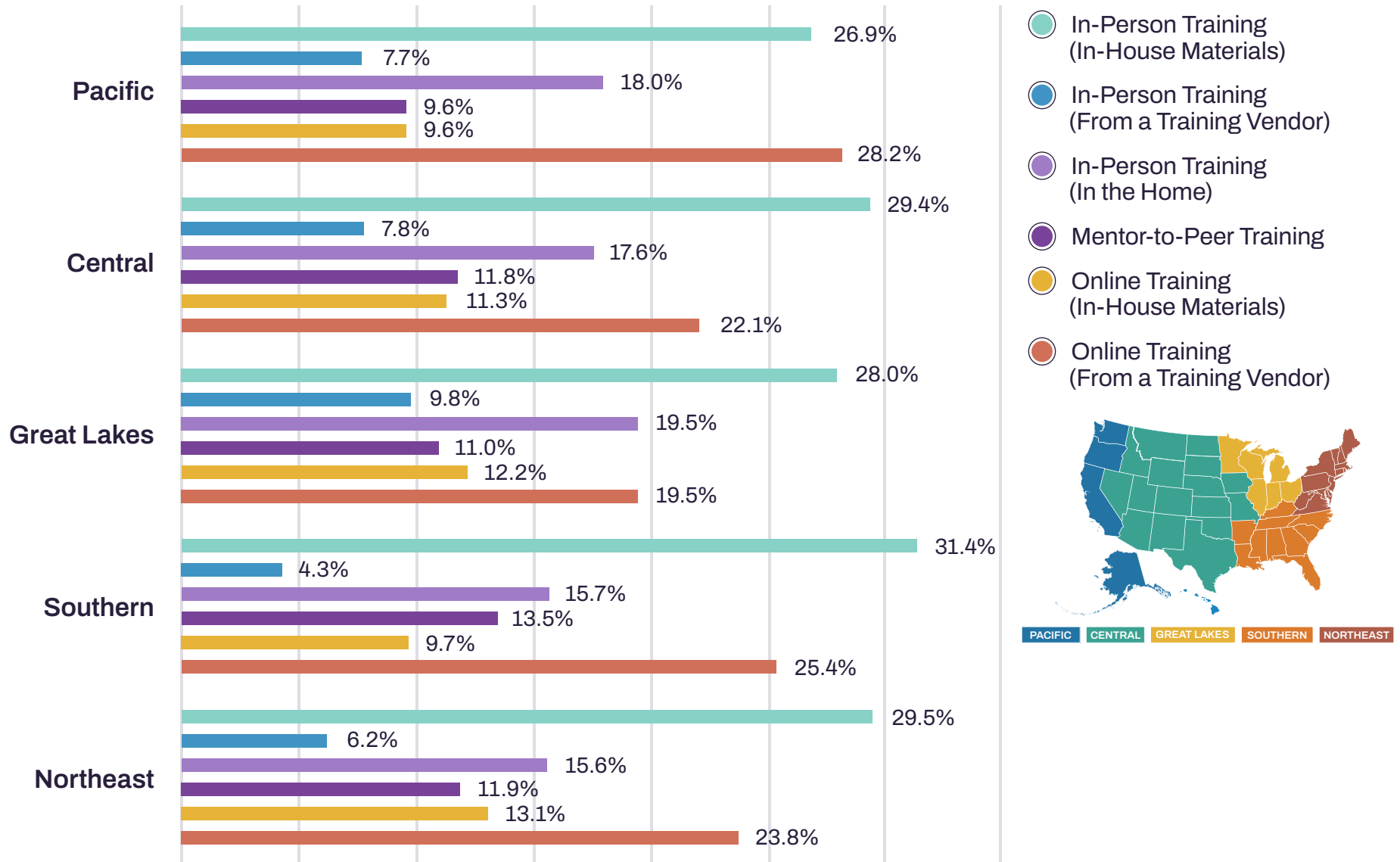
TRAINING TYPE USED

3.5 **Home Care** Training Type Used in 2023 - Revenue Range



TRAINING TYPE USED

3.6 Overall Training Type Used in 2023 - Geographic Regions





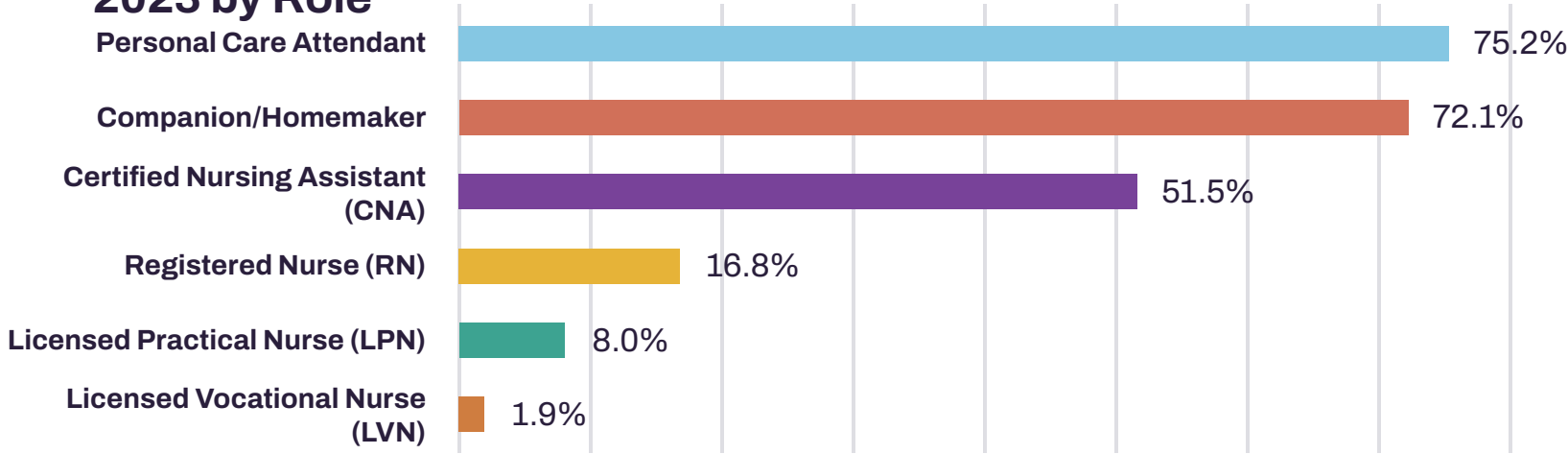
PROFESSIONAL TRAINING PROGRAMS

3.7 **Overall** Percentage of Agencies Who Used a Professional Training Program in 2023 - Line of Business



PROFESSIONAL TRAINING PROGRAMS

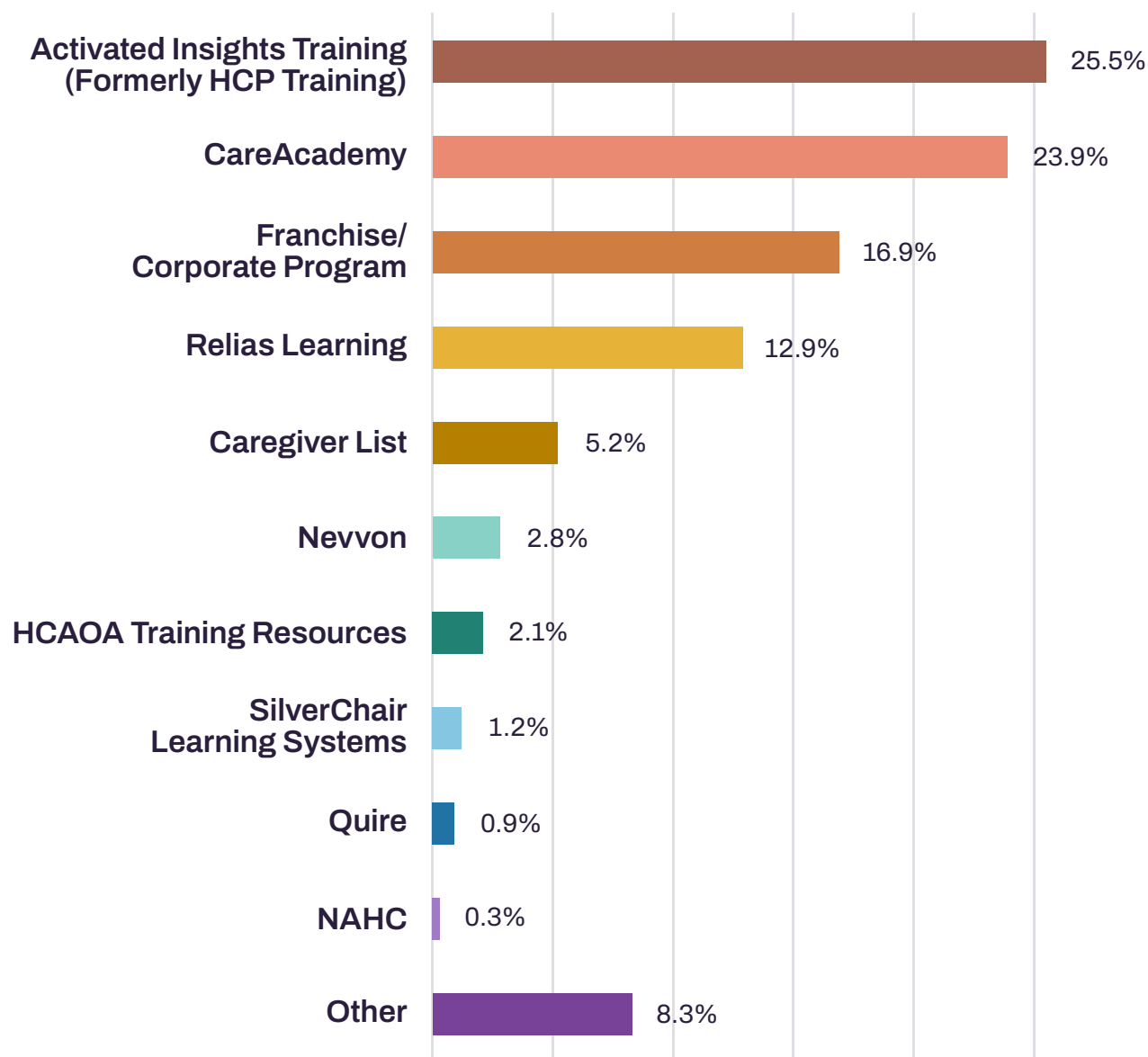
3.8 **Overall** Percentage of Agencies Who Used a Professional Training Program in 2023 by Role





PROFESSIONAL TRAINING PROGRAMS

3.9 Overall Top 10 Professional Training Programs



2023 Training Program Usage

70.5%

of providers use a professional training program.

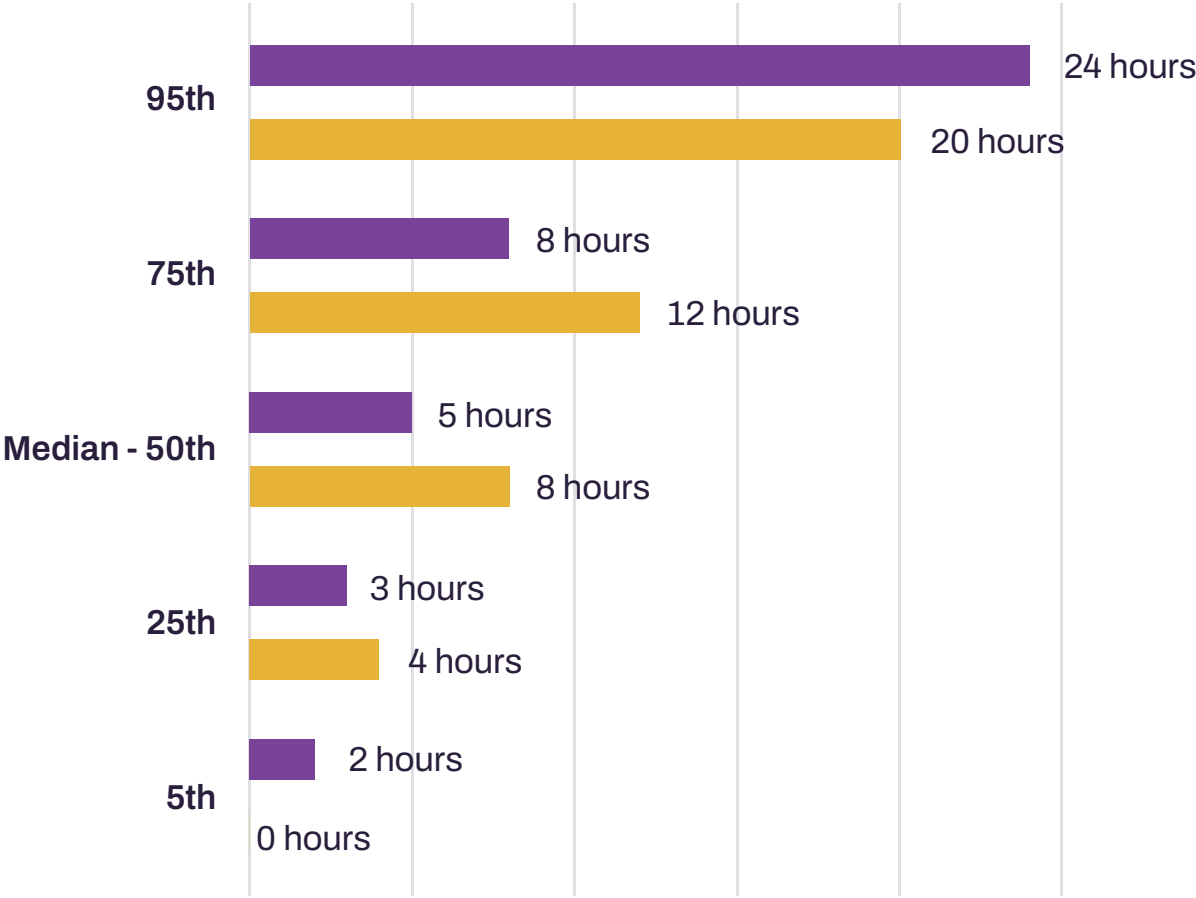
For more information regarding training options for your care professionals, visit activatedinsights.com/training.

Survey participants were asked, "Which of the following professional and online training programs does your business use?"



TRAINING HOURS

3.10 **Home Care** Number of Professional Caregiver Training Hours for 2023 - Percentile Ranking



- Orientation
- Ongoing

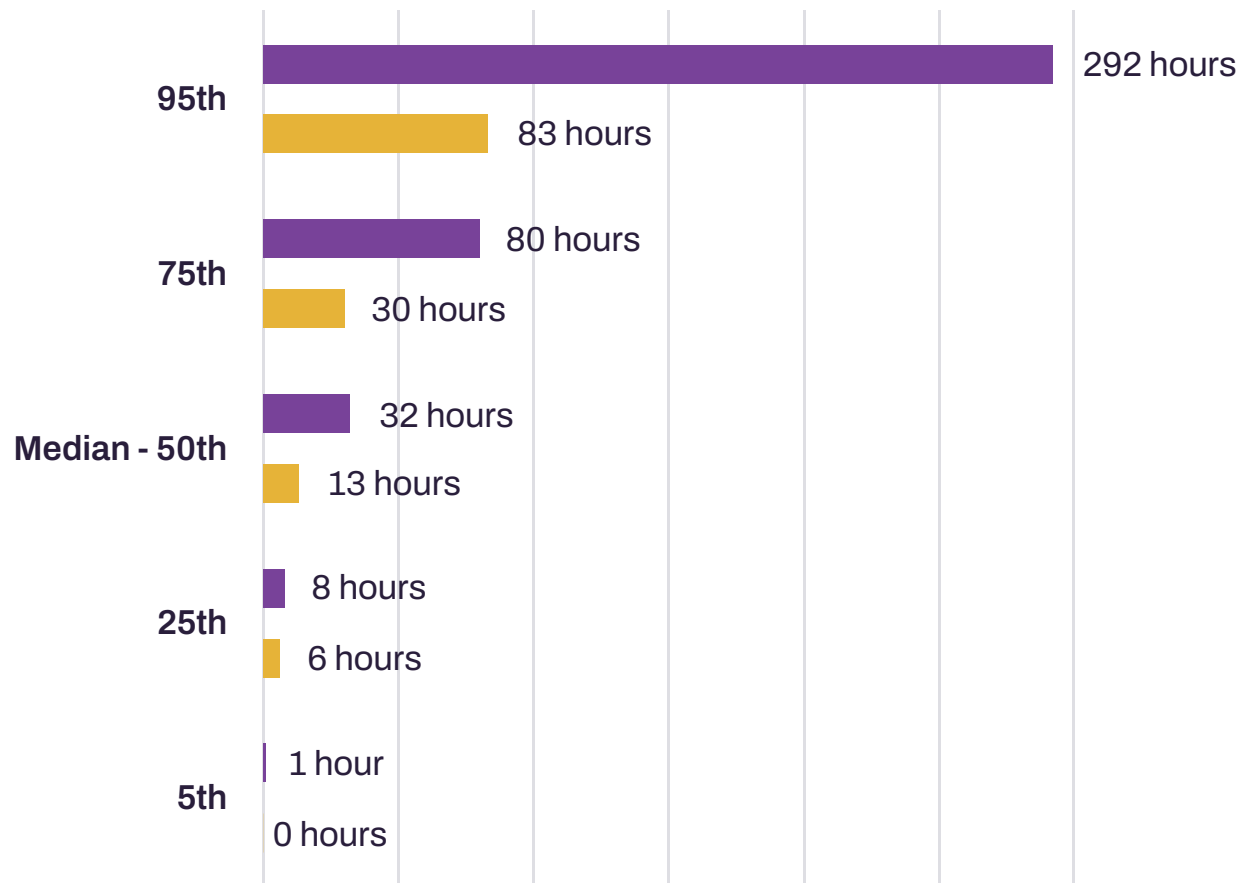
Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

Survey participants were asked, “Approximately how many hours are your initial caregiver trainings/orientations for your newly hired caregivers?” and “How many hours of ongoing training do you require caregivers to complete within their first 12 months of employment?”



TRAINING HOURS

3.11 **Home Health** **Hospice** Number of Clinician Training Hours for 2023 - Percentile Ranking



Orientation

Ongoing

Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

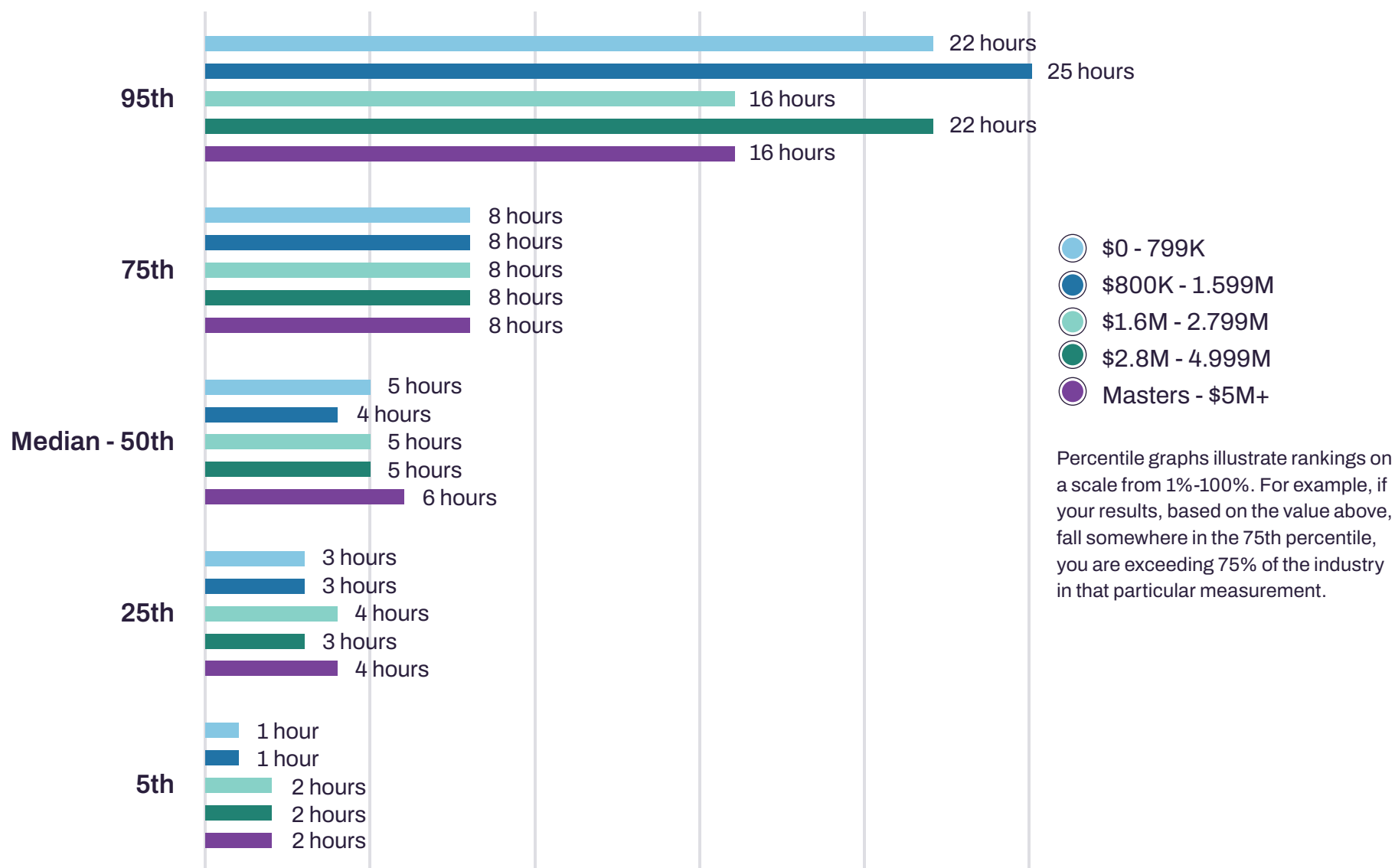
Note: It is common for home health and hospice agencies to require newly hired clinicians to complete a preceptorship. These structured orientation programs may last 60 to 90 days.

Survey participants were asked, "Approximately how many hours are your initial trainings/orientations for your newly hired clinicians?" and "How many hours of ongoing training do you require clinicians to complete within their first 12 months of employment?"



TRAINING HOURS

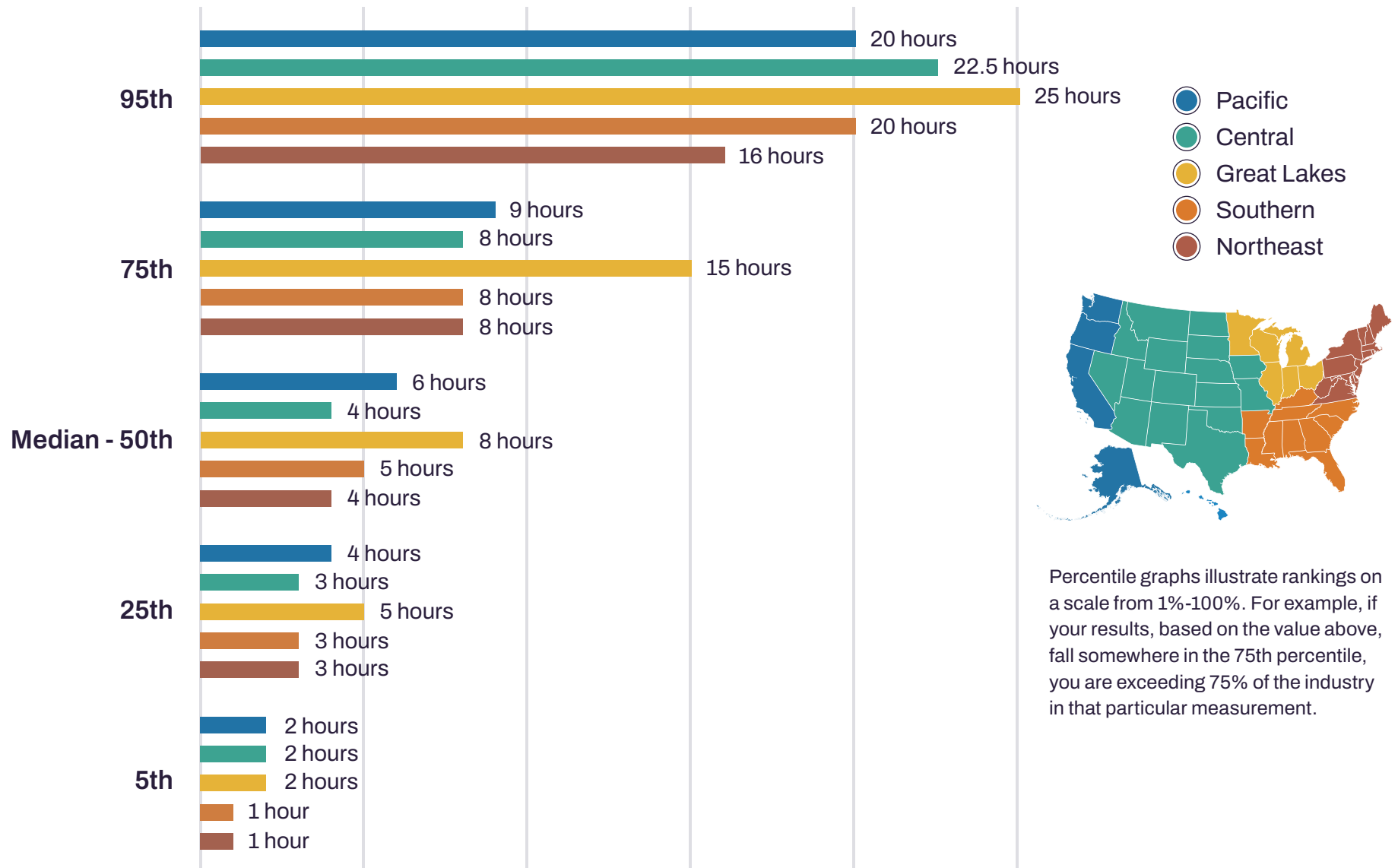
3.12 Home Care Number of Professional Caregiver Orientation Training Hours for 2023 - Revenue Range





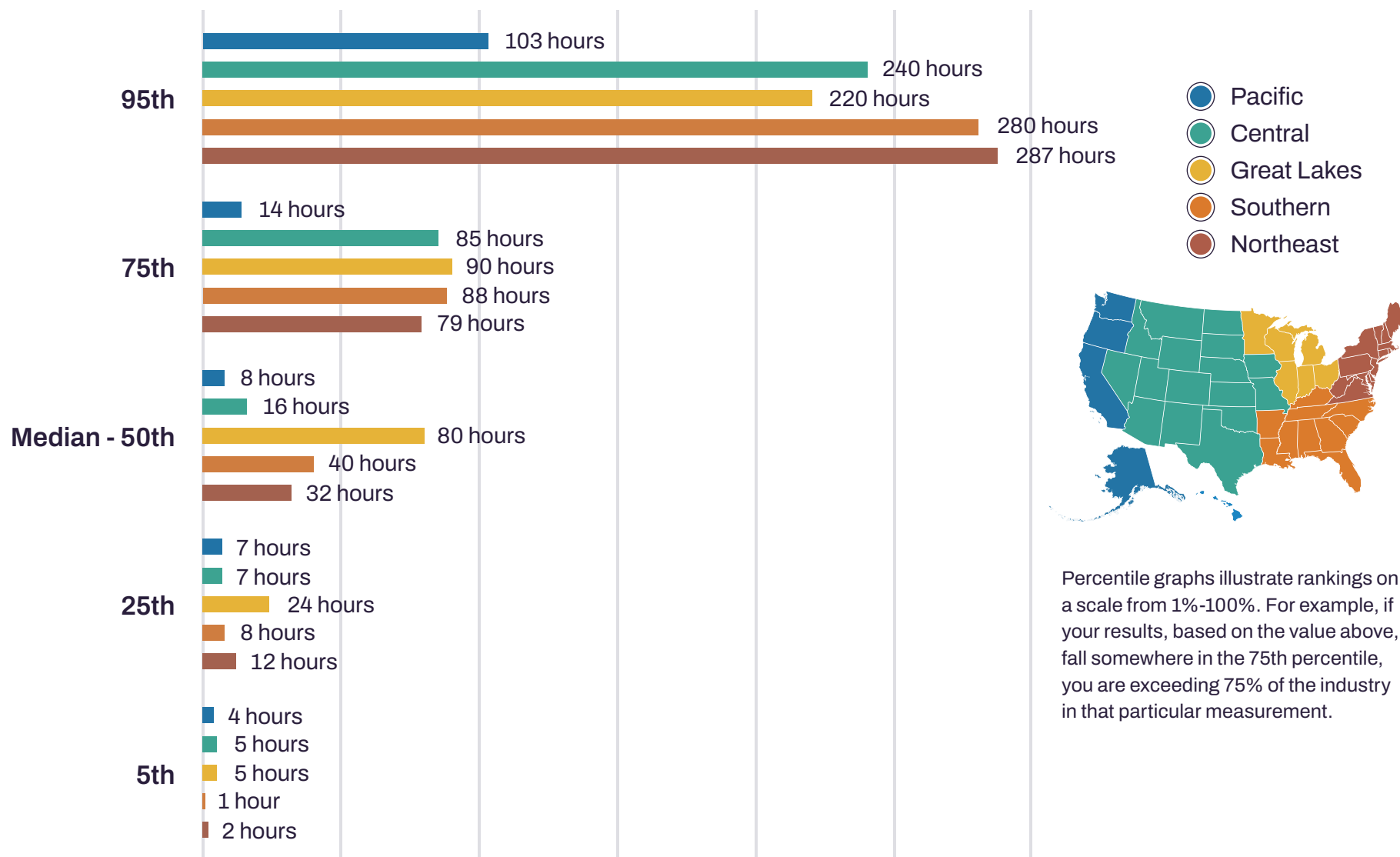
TRAINING HOURS

3.13 Home Care Number of Professional Caregiver Orientation Training Hours for 2023 - Geographic Regions



TRAINING HOURS

3.14 **Home Health** **Hospice** Number of Clinician Orientation Training Hours for 2023 - Geographic Regions





TRAINING HOURS

3.15 Home Care Median Number of Ongoing Professional Caregiver Training Hours for 2023 - Revenue Range

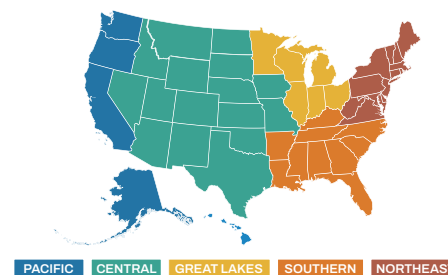
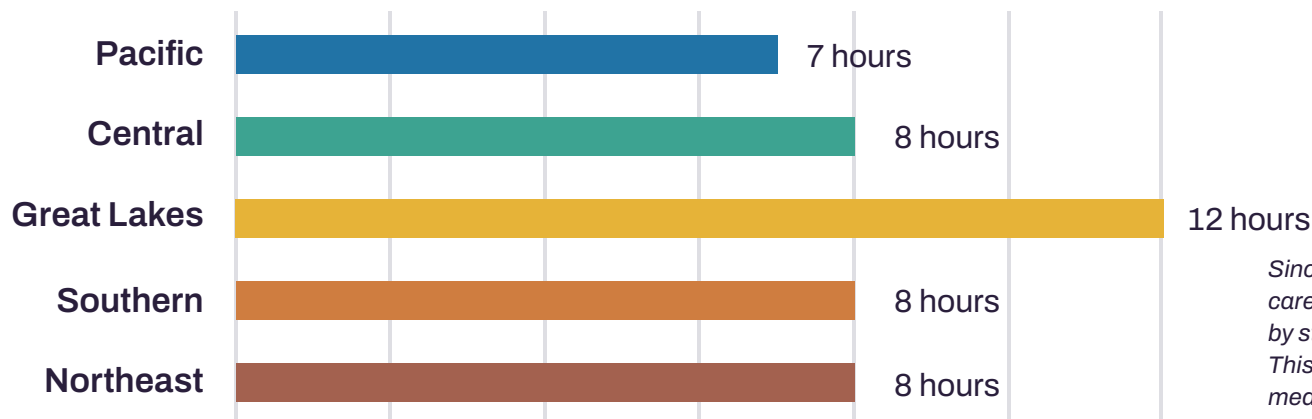


Beyond the Data

Each home care agency has a unique combination of training requirements based on state, federal, accrediting body, and payor source regulations. Activated Insights Training monitors these regulations continuously and builds each agency a highly customized training curriculum. You can [download your state regulations report](#) and discuss any additional training needs with your Activated Insights Training advisor.

TRAINING HOURS

3.16 Home Care Median Number of Ongoing Professional Caregiver Training Hours for 2023 - Geographic Region

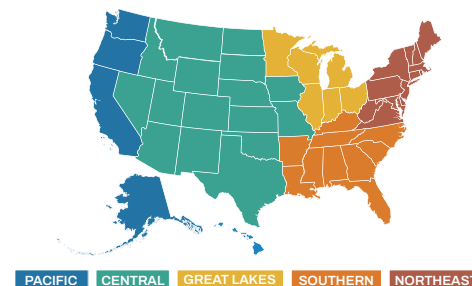
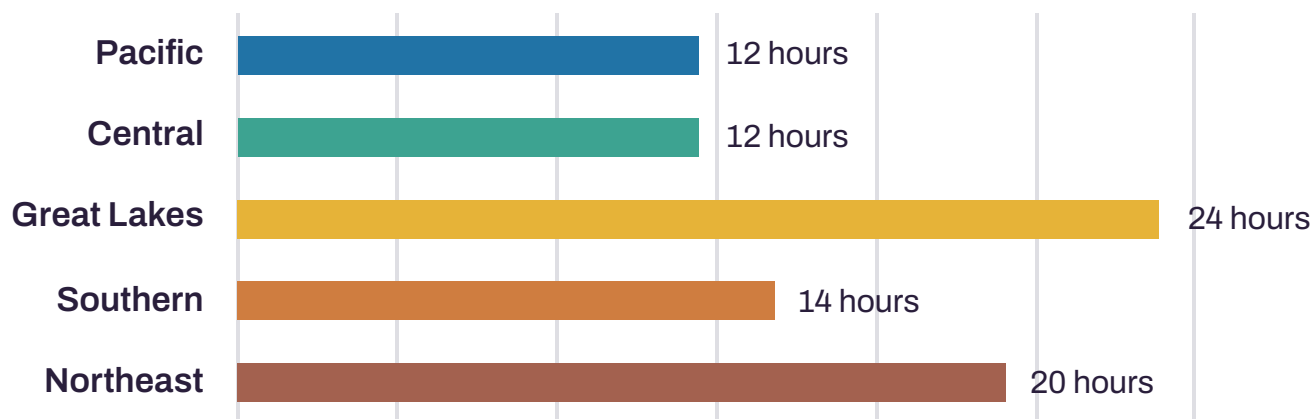


Since there is no federal requirement for professional caregiver training, training requirements vary widely by state, from no requirement at all up to 75 hours. This wide variance in requirements likely affects the median orientation and ongoing training hours for each region.



TRAINING HOURS

3.17 **Home Health Hospice** Median Number of Ongoing Clinician Training Hours for 2023 - Geographic Region

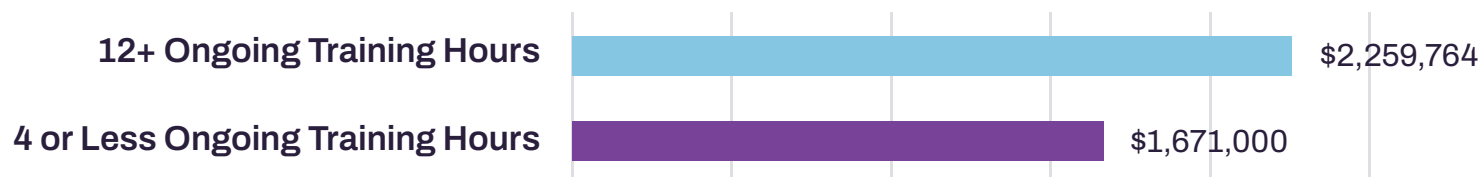


TRAINING HOURS

3.18 **Home Care** Median Revenue by Orientation Training Hours for 2023



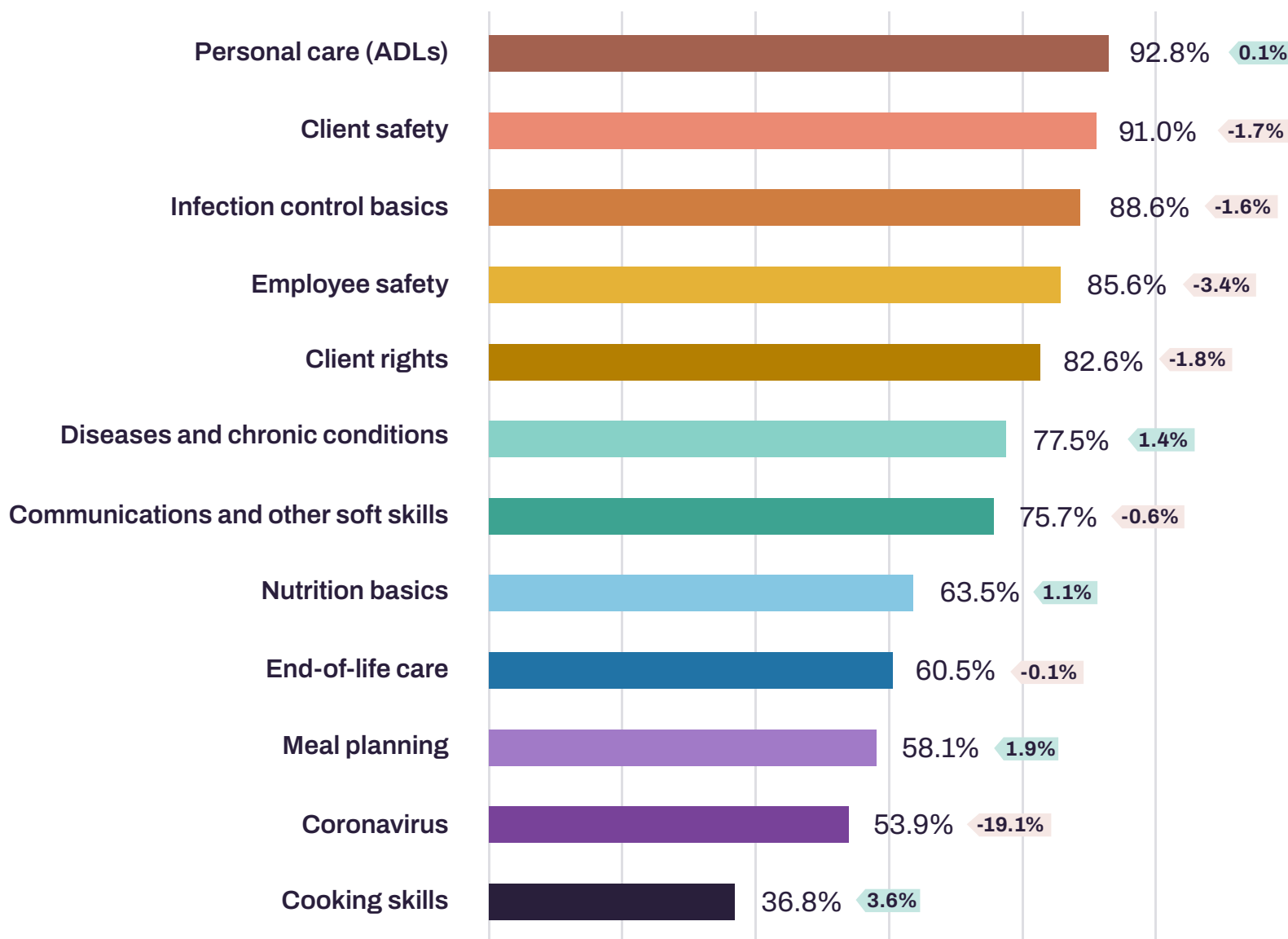
3.19 **Home Care** Median Revenue by Ongoing Training Hours for 2023





TRAINING TOPICS

3.20 Home Care Percentage of Agencies That Provide Training By Topic



Survey participants were asked, "Which of the following areas do you currently provide training on to your caregivers?"

Highlighted percentages represent the change year-over-year.

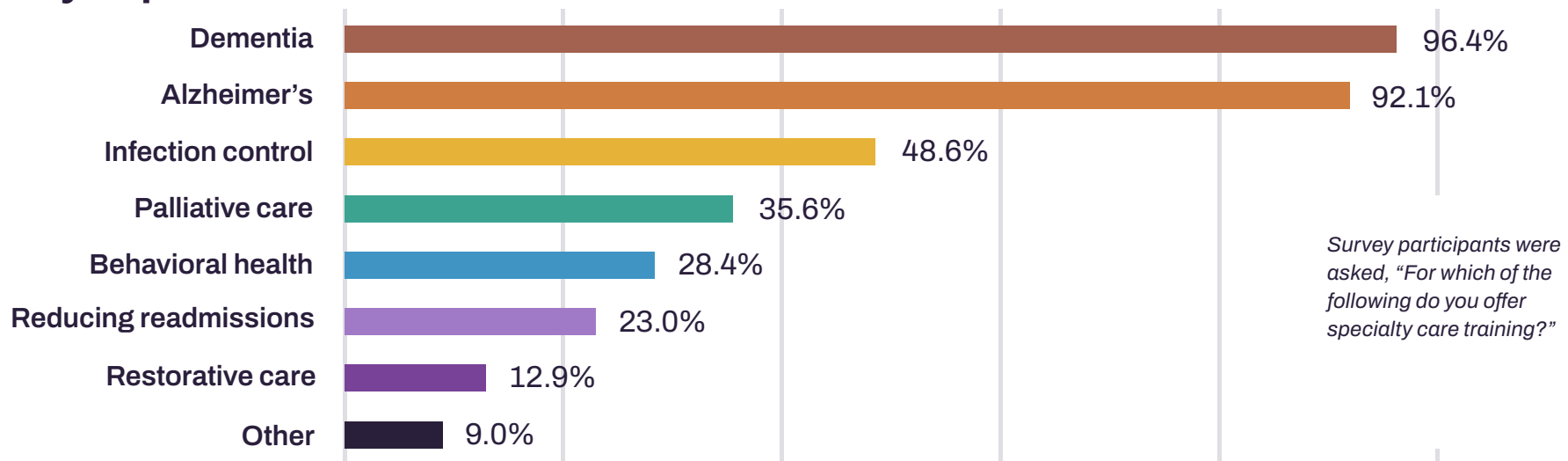
TRAINING TOPICS

3.21 Home Care Percentage of Agencies That Provided Specialty Care Training in 2023



TRAINING TOPICS

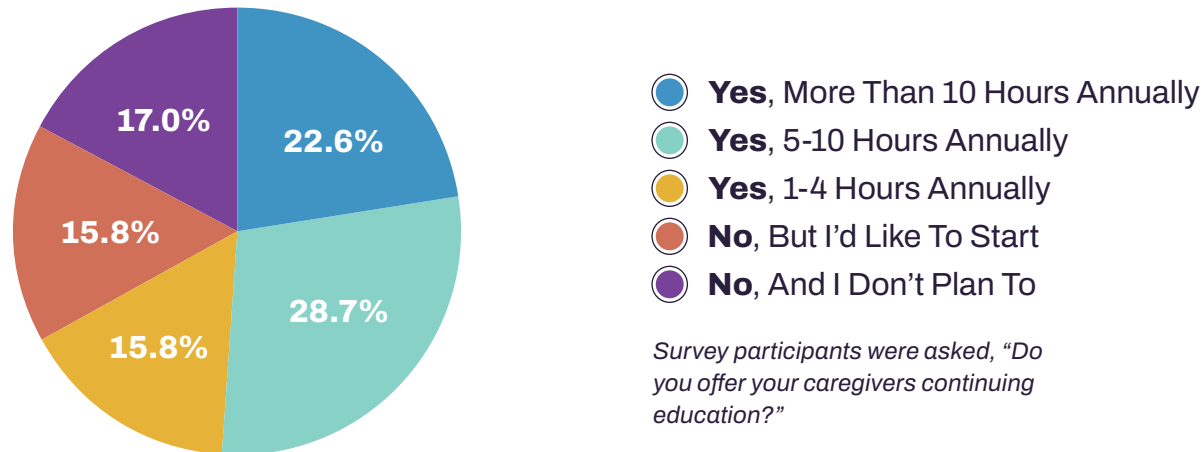
3.22 Home Care Percentage of Agencies That Provide Specialty Care Training By Topic





CONTINUING EDUCATION

3.23 Home Care Percentage of Agencies That Provided Continuing Education in 2023

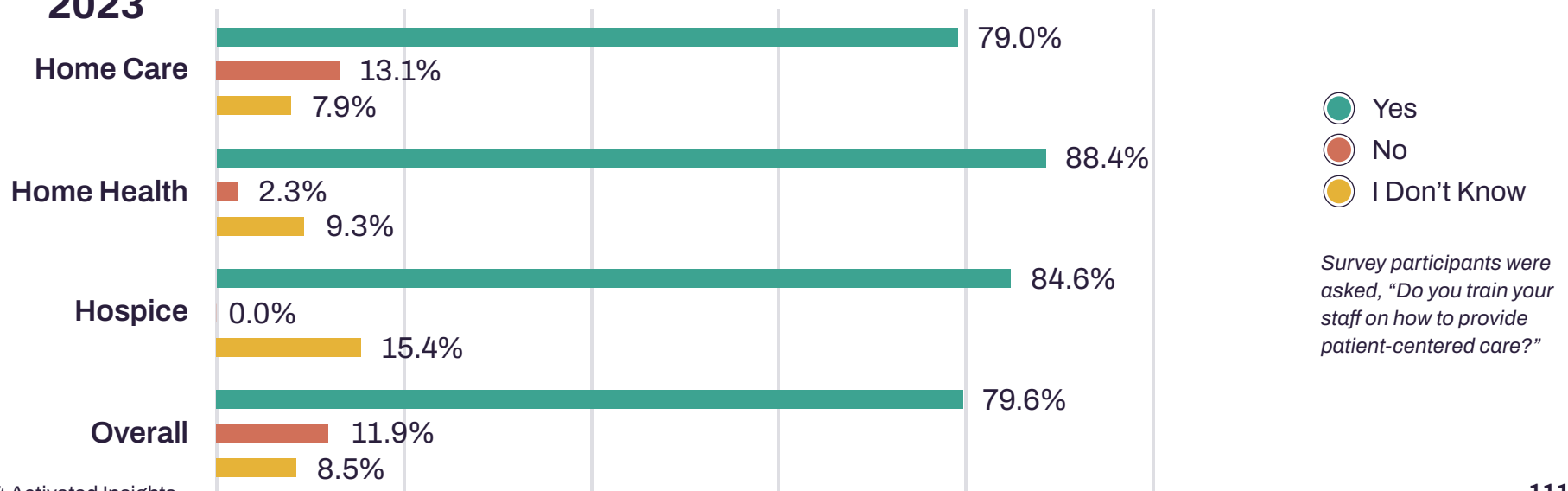


67.1%

of agencies provide some continuing education annually.

PATIENT-CENTERED CARE

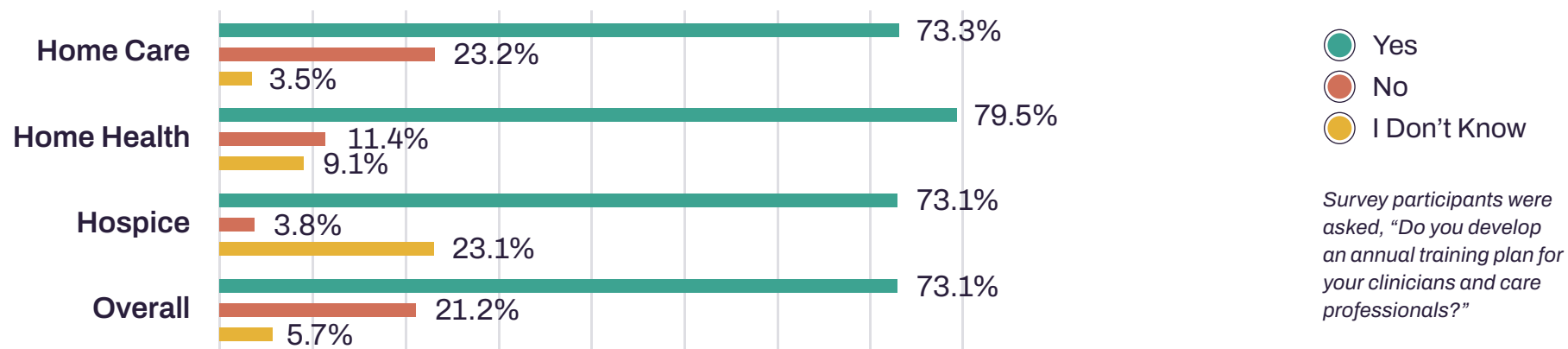
3.24 Overall Percentage of Organizations That Train on Patient-Centered Care in 2023





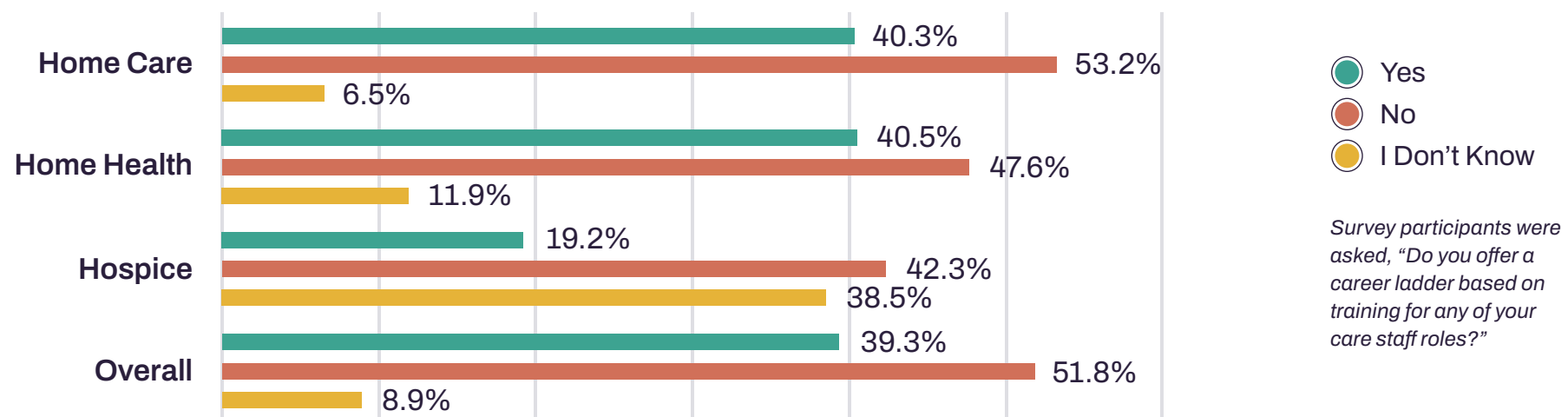
TRAINING PLAN

3.25 **Overall** Percentage of Organizations that Develop an Annual Training Plan in 2023 - Line of Business



CAREER LADDER

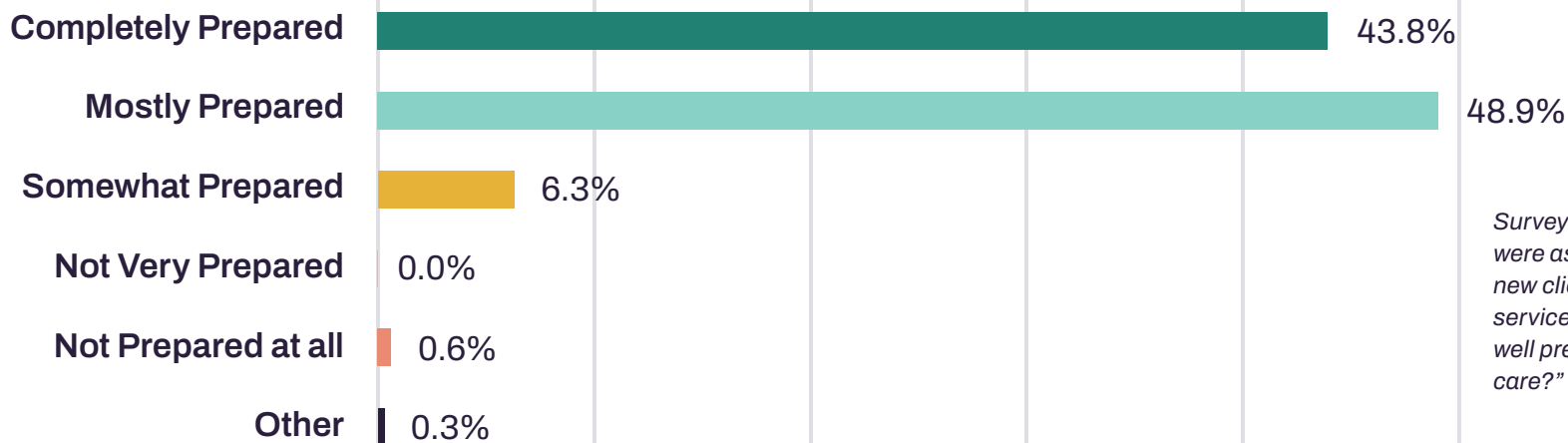
3.26 **Overall** Percentage of Organizations that Offer Career Ladder Based on Training in 2023 - Line of Business





CARE STAFF PREPARATION

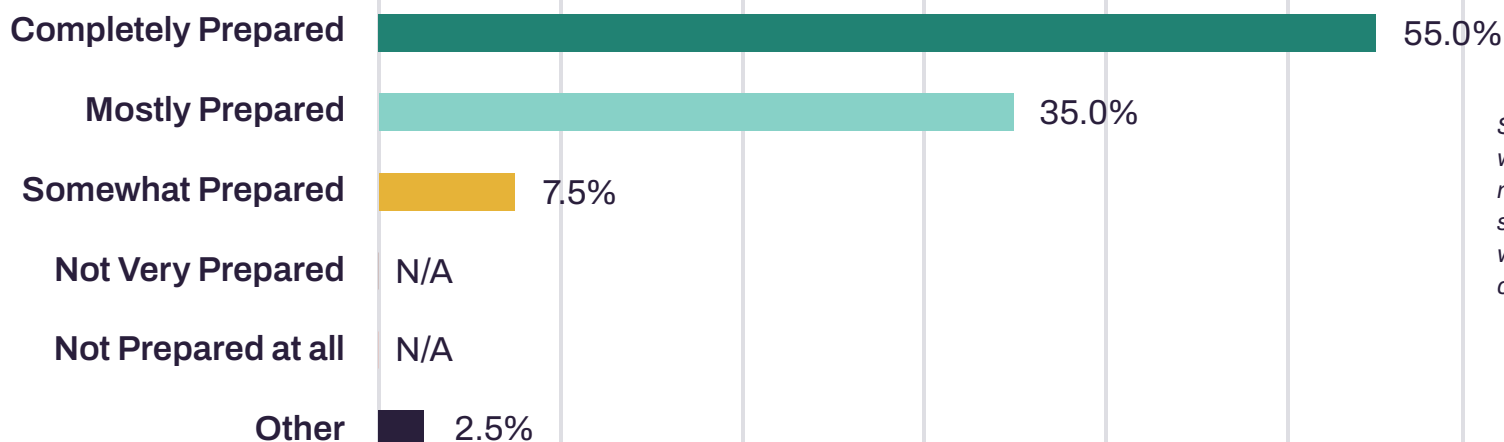
3.27 Home Care Care Staff Preparation



Survey participants were asked, "When a new client/patient begins services, is your care staff well prepared to perform care?"

CARE STAFF PREPARATION

3.28 Home Health Care Staff Preparation

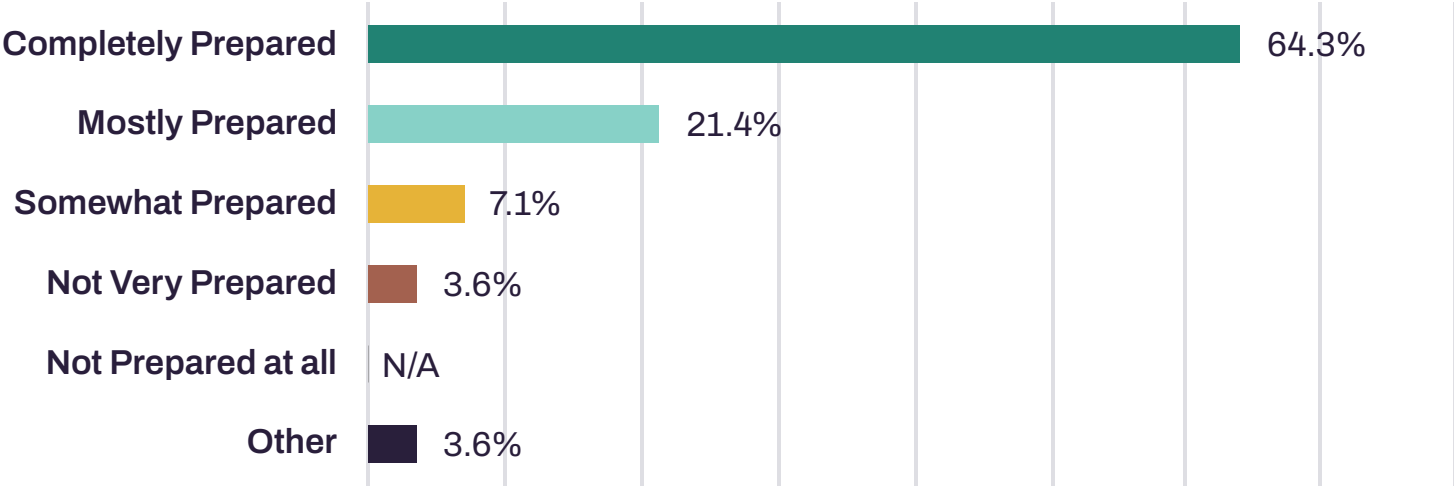


Survey participants were asked, "When a new client/patient begins services, is your care staff well prepared to perform care?"



CARE STAFF PREPARATION

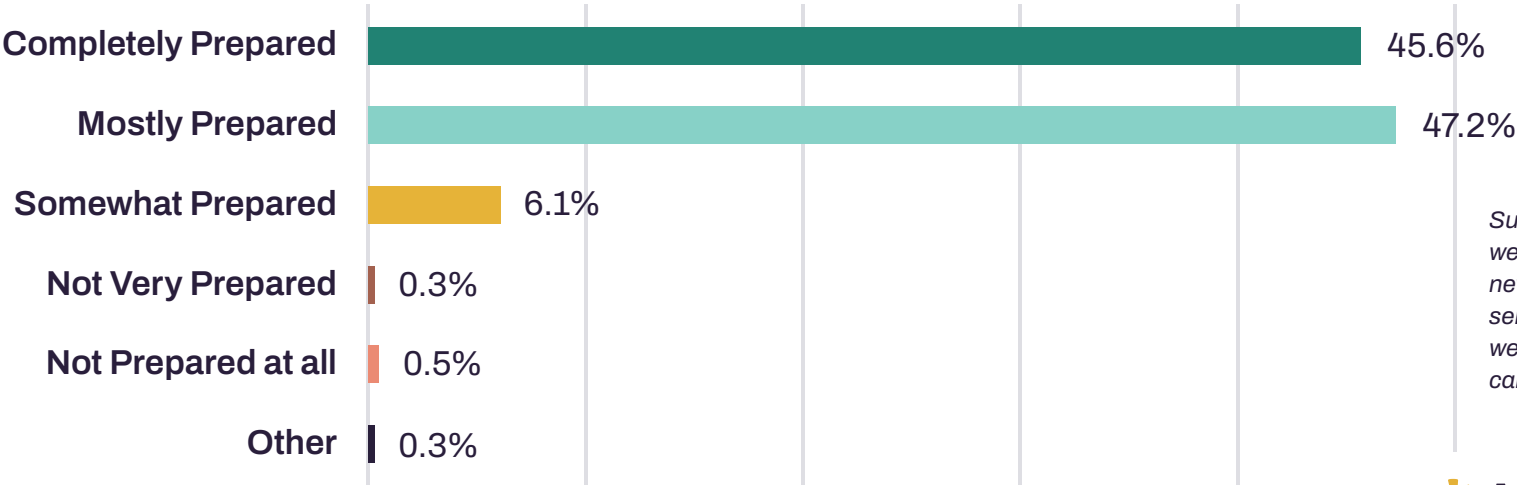
3.29 Hospice Care Staff Preparation



Survey participants were asked, “When a new client/patient begins services, is your care staff well prepared to perform care?”

CARE STAFF PREPARATION

3.30 Overall Care Staff Preparation



Survey participants were asked, “When a new client/patient begins services, is your care staff well prepared to perform care?”

ARTICLE

End-of-Life Training is Essential To Every Employee—Even Office Staff

**Barbara Karnes, RN**

End-of-Life Author & Educator
Barbara Karnes Books Inc.

BARBARA KARNES RN
end of life education materials
for families & professionals
BK

Everybody dies. It used to be that grandma lived with us and died in the upstairs bedroom. We were there. We watched death come. We learned how people die.

Today, grandma lives in a senior citizen community, then moves to assisted living, and finally to a nursing facility. That is where she dies. If she is lucky, family will be there, but for most they probably won't.

We don't have the contact, personal association, or knowledge of how death comes. We haven't learned how dying happens.

People don't die like they do in the movies. There are no profound last words or closing of the eyes. Dying can be untidy, noisy, long, and scary if we don't know what is normal and not normal.

Enter end-of-life training. If done well, end-of-life education explains gently, in simple terms, not just what happens when death is near but what a person looks like, as well as what they will probably do in the months to minutes before death.

There are only two ways to die: fast or gradual. Fast is sudden; a person is alive one minute and dead the next. Gradual death occurs either because of disease or simply old age. Gradual death takes longer. There is a process, and there are patterns to look for that help you gauge where you are in the timeline. These patterns can also help you distinguish between normal and pathological processes.

Noticing the Patterns of Approaching Death

Our healthcare system tends to concentrate on keeping people alive. It teaches us how to keep a body going even when it can't be fixed or is just wearing out from living a long life.

Our healthcare system doesn't spend much attention on what to do when a person can't be fixed. It doesn't address how to help a person live the best they can until they can't.

When healthcare professionals are educated in signs of approaching death and what to do as death is approaching, everyone will be on the same page of care. The list of "healthcare professionals" who should be educated on end-of-life care is extensive. It includes those in expected roles, such as physicians, nurses, nurse aides, social workers, and counselors. It even includes physical, speech, and occupational therapists. And yes, office workers, receptionists, and cleaning and kitchen staff should also be educated.

With proper training, everyone will understand that food is not needed as it once was, that sleep increases, and that socialization diminishes. When everyone understands what dying and death look like, there will be continuity of services that address all patient and family needs.

Many eyes will observe and understand when and how to shift care. Most importantly, proper end-of-life training also alleviates fear. I should mention fear regarding dying and death. Because of our lack of knowledge of

what dying and death looks like, no matter our role in healthcare, we may, and probably will, bring fear to the bedside in the care we give.

End-of-life knowledge:

- Reduces that fear for everyone involved in the dying process.
- Assists healthcare employees grieve the patients they lose.
- Enables healthcare workers to serve their patients and families in a more comprehensive and supportive manner.

5 End-of-Life Areas to Address When Training Employees:

To be sure your employees receive quality training about death and dying, here are five things to consider:

1. End-of-life care is different than "getting better" care.
2. Signs of approaching death. What to look for that says that a person has entered the dying process. Months, weeks, days, and hours.
3. What to do now that you have determined the dying process has begun.
4. What to say and not say in offering support and guidance.
5. By educating staff on how people die and what to do while it is happening, they will provide better care for patients and be more assured in the care they provide. 



ABOUT THE AUTHOR

Barbara Karnes is an award-winning end-of-life educator, award-winning nurse, who won the NHPCO Hospice Innovator Award in 2018, and was the 2015 International Humanitarian Woman of the Year!

*While at the bedside of hundreds of people during the dying process, Hospice Pioneer Barbara Karnes noticed that each death was following a near-identical script. Each person was going through the stages of death in almost the same manner, and most families came to her with similar questions. These realizations led Barbara to sit down and write *Gone From My Sight*, "The Little Blue Book" that changed the hospice industry.*

“Because of our lack of knowledge of what dying and death looks like, no matter our role in healthcare, **we may, and probably will, bring fear to the bedside in the care we give.**”

Why ADLs Aren't Enough —

How To Pave Enhanced Career Pathways That Lead Your Employees Toward Success



Mia Haney

Chief Executive Officer
The Pennsylvania Homecare Association



If you've had to rely on home health, home care, or hospice services for you or a loved one, you are deeply aware of the critical role that our home health care workforce plays in the well-being of patients across the nation. They often enter your life during a period of uncertainty and confusion. They can become like family, a valued and integral part of your loved one's health story. But when they arrive and when they leave you, it is during those times when you and your family are vulnerable, and you depend on them—and the system they work in—to support you.

Throughout the pandemic, we saw an improved appreciation of the value of home health care workers in our healthcare system. Yet, we still find their value and their challenges overlooked.

Accessing funding for home health care can often be a multi-week or multi-month process in which home environments and health status decline, leaving the

workforce to solve the repercussions of system delays. This workforce often finds itself stuck in the middle of an overly complex healthcare system, trying to navigate approvals and benefits to properly advocate for patients.

Imagine arriving at your patient's home to find they have no wound care supplies, no cleaning supplies, and no money for food. There's more we can do to support this workforce, and the time is now.

At its core, bolstering this essential workforce necessitates investing in training and fostering enhanced career pathways. Training is indispensable for care staff to deliver assistance with activities of daily living in a manner that is safe, compassionate, and of the highest quality, thereby safeguarding the well-being and dignity of those under their care.

Training Beyond Compliance

Although training on activities of daily living (ADL) may encompass routine tasks, comprehensive training significantly elevates the capabilities of professional caregivers across several crucial dimensions:

- **Safety:** Proper training ensures that care staff understand how to assist individuals with ADLs safely, minimizing the risk of accidents, injuries, or harm to both the caregiver and the individual receiving care. This should include techniques for lifting, transferring, and positioning individuals safely, as well as protocols for managing medical equipment and administering medications.
- **Dignity and Respect:** Training helps care staff learn how to assist with ADLs in a manner that preserves the individual's dignity, privacy, and independence. Caregivers need to be taught to approach each task with empathy, patience, and sensitivity to the individual's preferences and cultural beliefs.



- **Quality of Care:** Training equips care staff with the knowledge and skills needed to deliver high-quality care that meets the physical, emotional, and social needs of the individual. Your training program should ensure an understanding of the principles of person-centered care, effective communication techniques, and strategies for promoting comfort and well-being.
- **Understanding of Conditions:** To be competent, care staff must receive training on common medical conditions, disabilities, and age-related changes that may impact an individual's ability to perform ADLs. This knowledge helps caregivers anticipate and respond to the unique needs and challenges faced by each individual, such as mobility limitations, cognitive impairments, or sensory deficits.
- **Problem-Solving:** Training that goes beyond the basics empowers care staff to identify potential barriers or challenges in assisting with ADLs and develop creative solutions to overcome them. This may involve adapting techniques, using assistive devices, or collaborating with other members of the care team to address complex care needs effectively.
- **Legal and Ethical Considerations:** It is essential that care staff learn about their legal and ethical responsibilities in providing care, including maintaining confidentiality, respecting the individual's rights and preferences, and adhering to professional standards of conduct. This training helps care staff navigate complex ethical dilemmas and make informed decisions in the best interest of the individual.
- **Professional Development:** It is crucial to provide guidance beyond basic compliance training. Ongoing training and education opportunities allow care staff to enhance their knowledge, skills, and competencies over time, improving their effectiveness as caregivers and promoting career advancement within the field of caregiving.

Effective training programs empower diligent direct care workforce with the latest care practices and technologies, broadening their skillsets across diverse care environments. Retention rates often improve with advanced training, alongside an increase in word-of-mouth referrals, thereby strengthening the workforce and elevating the professionalism of the care they provide.

The broader economic impact of providing comprehensive and effective training to the professional caregiver population has a ripple effect, enhancing both patient care quality and employee satisfaction. By investing in skill development, we invest in the future of our healthcare system and the health of our communities. 

ABOUT THE AUTHOR

Mia Haney, CEO of the Pennsylvania Homecare Association, has over 15 years of expertise in home-based care spanning advocacy, policy development, leadership, and operations. Haney previously was Chief Operating Officer for Modivcare's 7 state personal care business. Haney's leadership, roles have significantly shaped policies with a focus on quality, social determinants of health, and improving outcomes. Holding an MBA from the University of Scranton and a BBA from the University of Miami, Mia's expertise and passion continue to drive advancements in home health care in Pennsylvania.

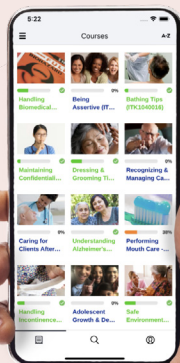
www.pahomecare.org

Training

Clinical & Non-Clinical Training

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Activated Insights Training is an immersive eLearning product with on-demand courses, tools, and technology that enable your care team to go beyond basic care to consistently deliver positive outcomes.



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- ✓ Extensive course catalog spanning the care continuum
- ✓ Training for home care, home health, hospice, & senior living
- ✓ Specialist and customized learning paths
- ✓ Available CNE, CEU, & ANCC credit
- ✓ Multilingual courses

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Explore everything Activated Insights Training has to offer today!

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5 Reasons You SHOULD JOIN THE HOME CARE ASSOCIATION OF AMERICA

1. *Advocacy—*
YOU HAVE A VOICE

2. *Networking—*
EXPAND YOUR PROFESSIONAL NETWORK

3. *Member Discounts—*
SAVE YOUR BUSINESS MONEY

4. *Education—*
SHARPEN YOUR COMPETITIVE EDGE

5. *Industry Updates—*
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**\$888 ANNUAL DUES =
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SUMMARY

Finance

The Finance section offers you a look into the average balance sheet of other businesses within your region, revenue range, and the industry as a whole. You'll also find crucial data about post-acute care organizations' revenue, expenses, payer sources, and profit and loss comparisons. Using this information, you can compare your business expenses to others in the industry and identify areas where you may be overspending. The Finance section also covers median billing rates by region to help you keep your pricing competitive.



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- 122** Median Revenue
- 125** Revenue Percentile Rankings
- 130** Profit & Loss Comparisons
- 133** Other Expenses
- 135** Revenue Generated by Service Offerings
- 136** Payer Source Percentages
- 137** Billing Methods
- 138** Billing Rates

ARTICLES

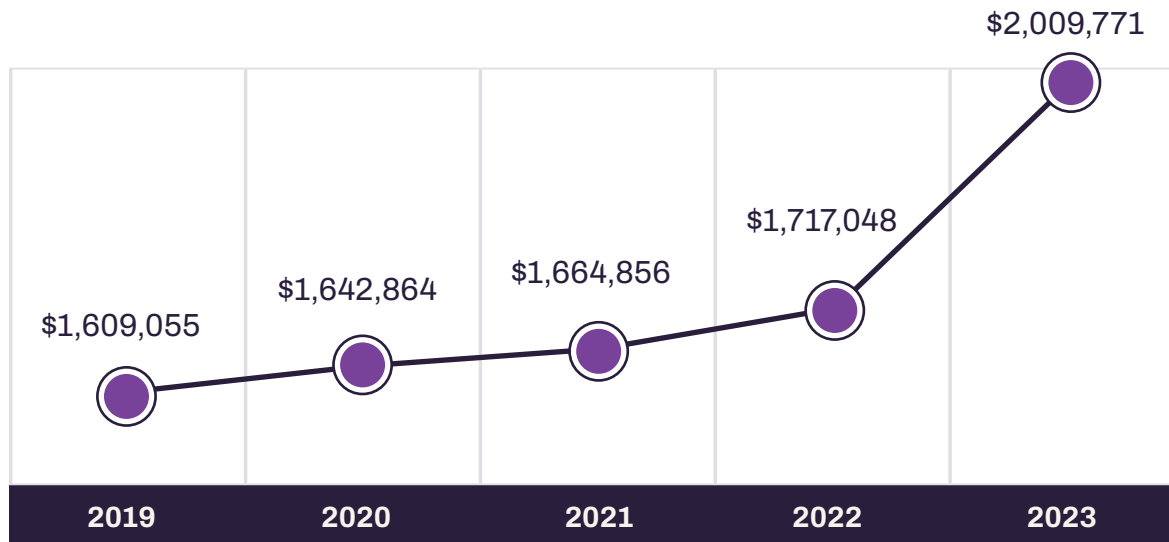
- 142** *4 Tips to Erase Shrinking Profit Margins*
- 145** *The How and Why of Payer Diversification in Home Care*
- 148** *How Griswold Uses Activated Insights Data for Franchise Success*

MEDIAN REVENUE

4.1 Home Care Historical Median Revenue

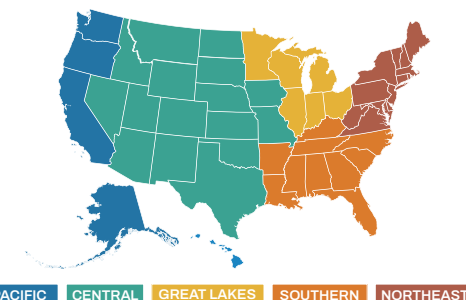
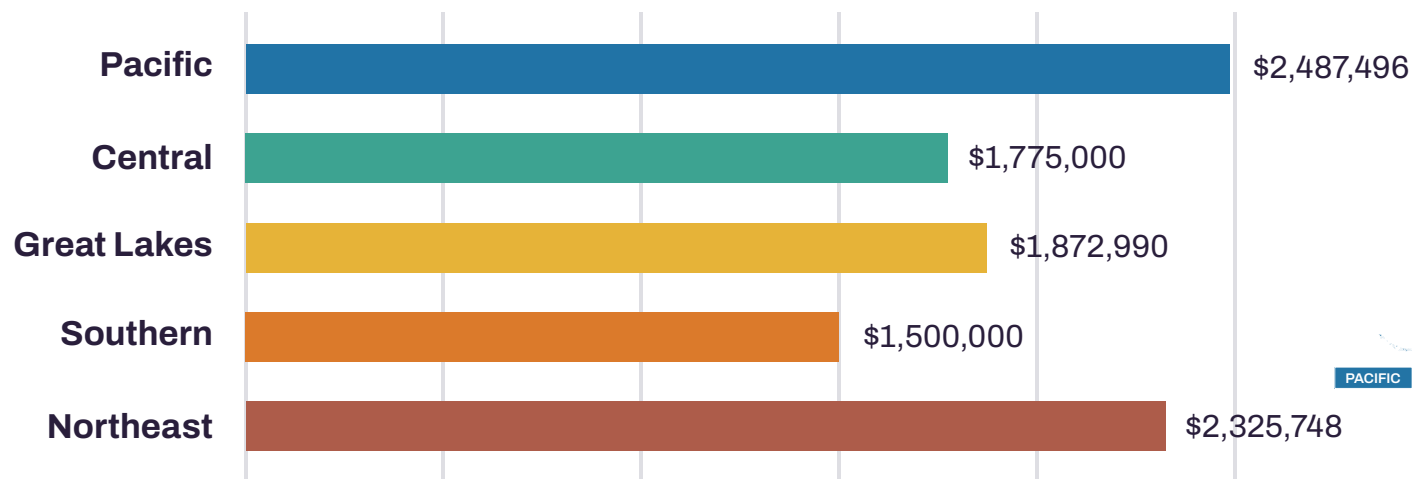
Median Revenue for the industry has grown by **24.9%** over the past 5 years.

Previous years' data appears differently than in prior reports due to the inclusion of more accurately segmented historical data in this year's report.



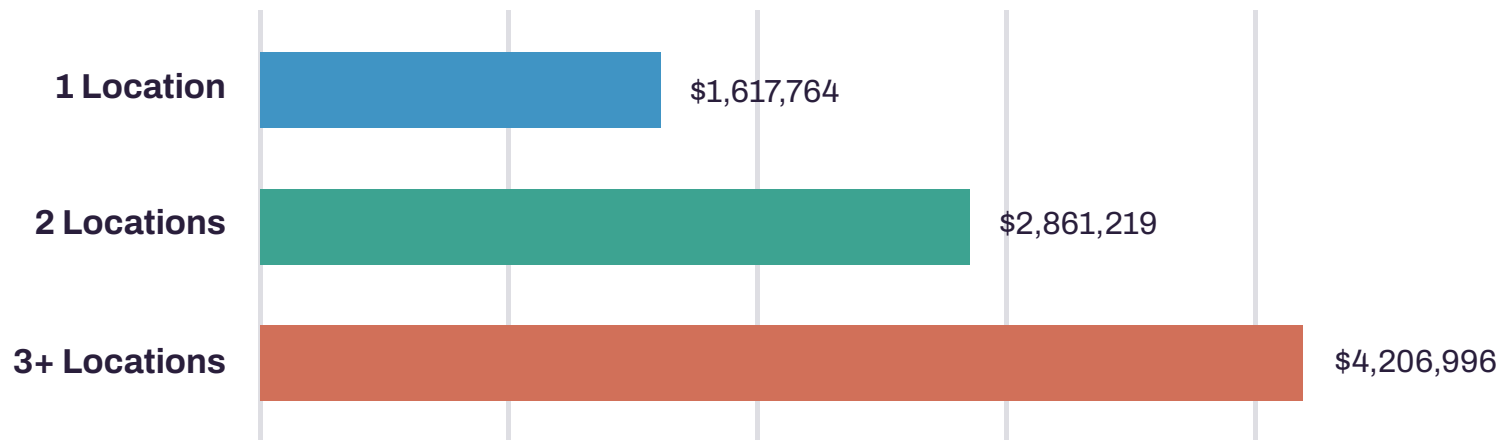
MEDIAN REVENUE

4.2 Home Care Median Revenue for 2023 - Geographic Region

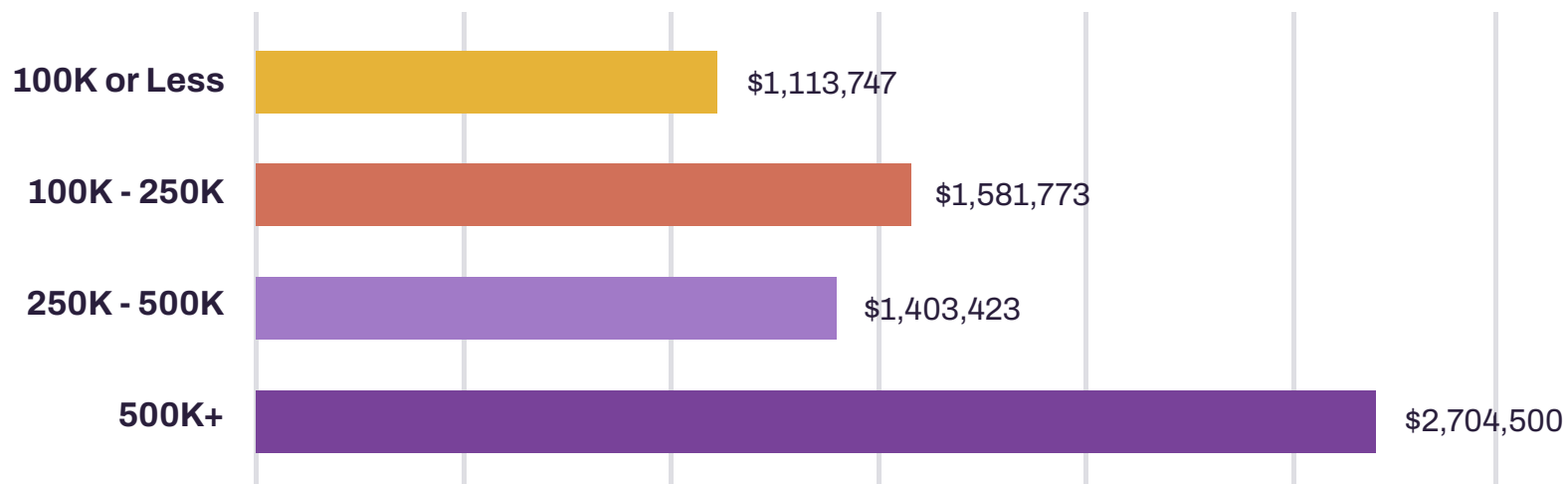




MEDIAN REVENUE

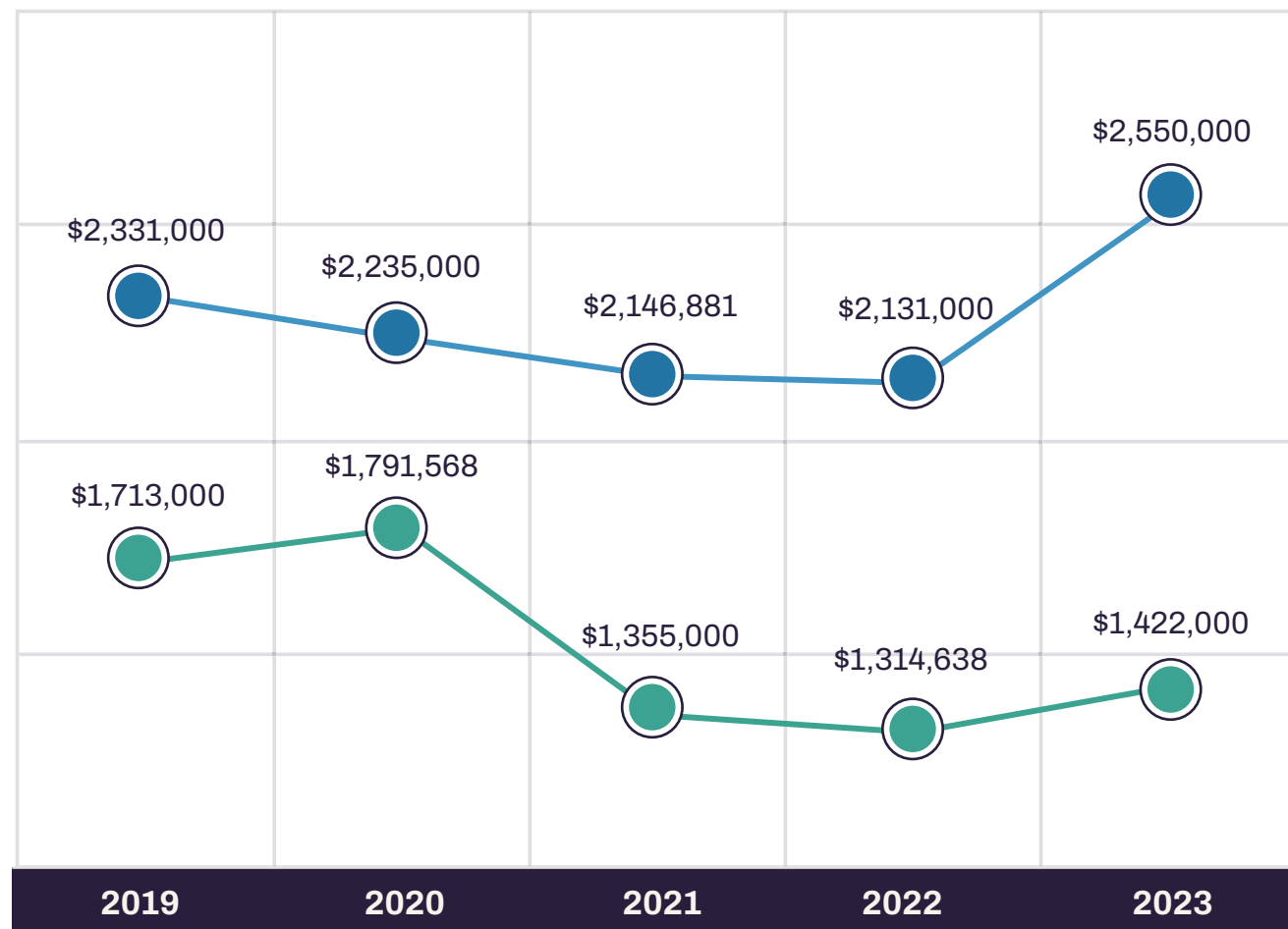
4.3 **Home Care** Median Revenue for 2023 - Number of Locations

MEDIAN REVENUE

4.4 **Home Care** Median Revenue for 2023 - Population Served

MEDIAN REVENUE

4.5 Home Care Historical Median Revenue - HCAOA Members vs. Non-Members



- HCAOA Members
- Non-HCAOA Members

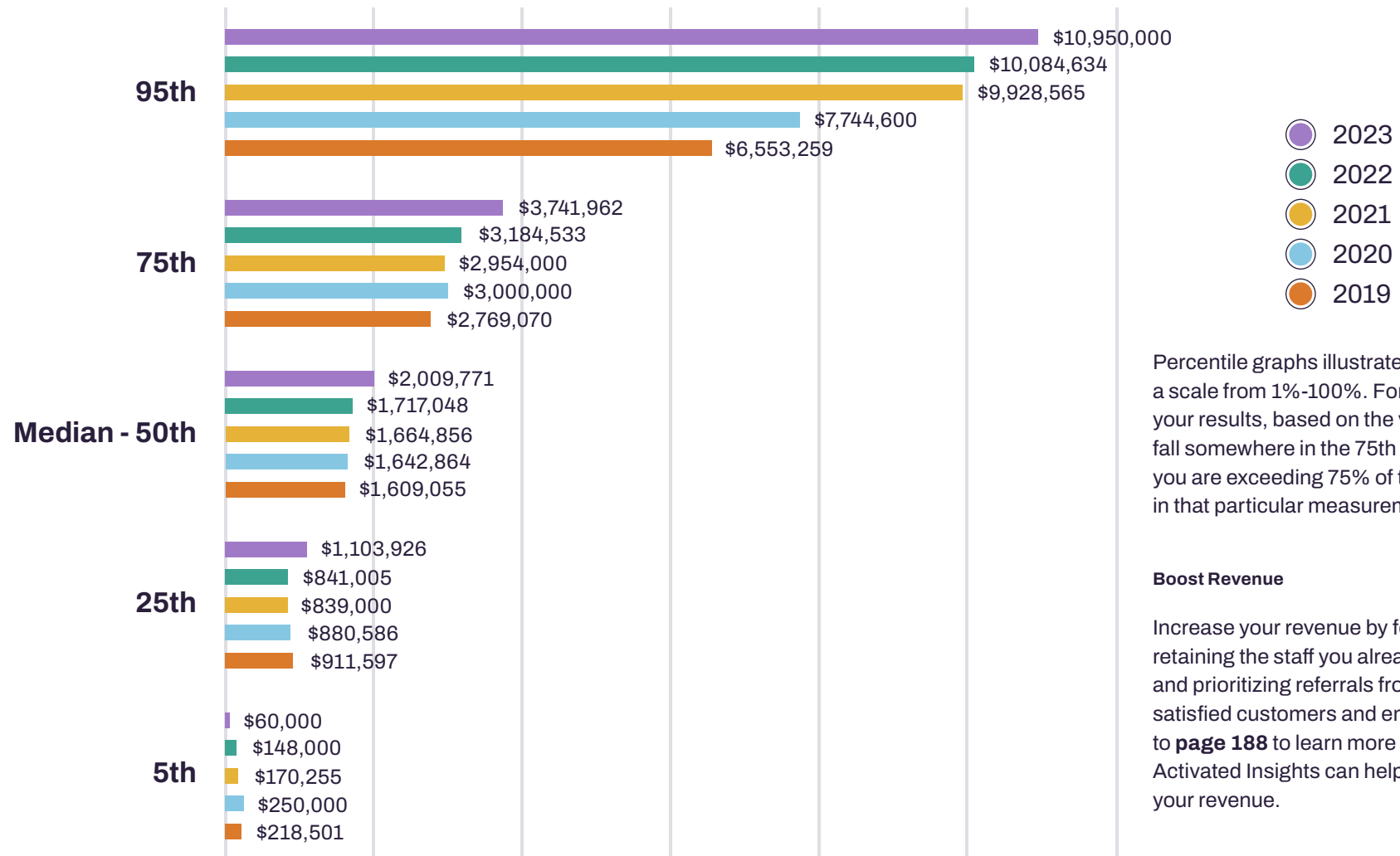
Non-HCAOA Members includes all industry revenue except that of HCAOA members.

For more information about the HCAOA, refer to Jason Lee's article, "**Looking Ahead: Forging Our Path from 2024 to 2050**" on page 14.



REVENUE PERCENTILE RANKINGS

4.6 Home Care Historical Revenue Percentile Rankings



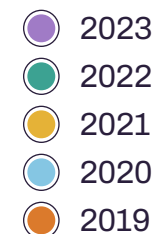
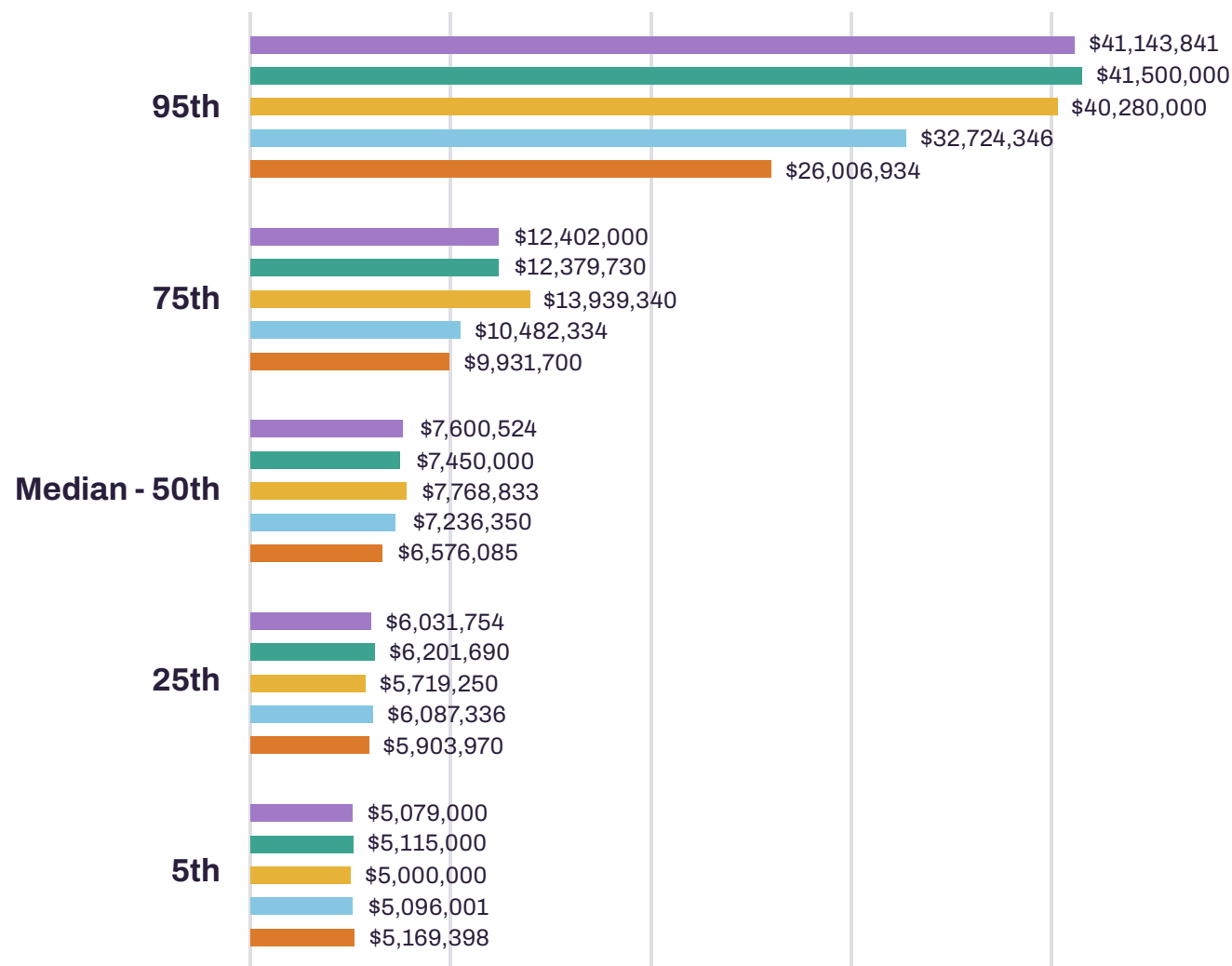
Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

Boost Revenue

Increase your revenue by focusing on retaining the staff you already have and prioritizing referrals from those satisfied customers and employees. Go to **page 188** to learn more about how Activated Insights can help you boost your revenue.



REVENUE PERCENTILE RANKINGS

4.7 **Home Care** Historical Revenue Percentile Rankings - Masters

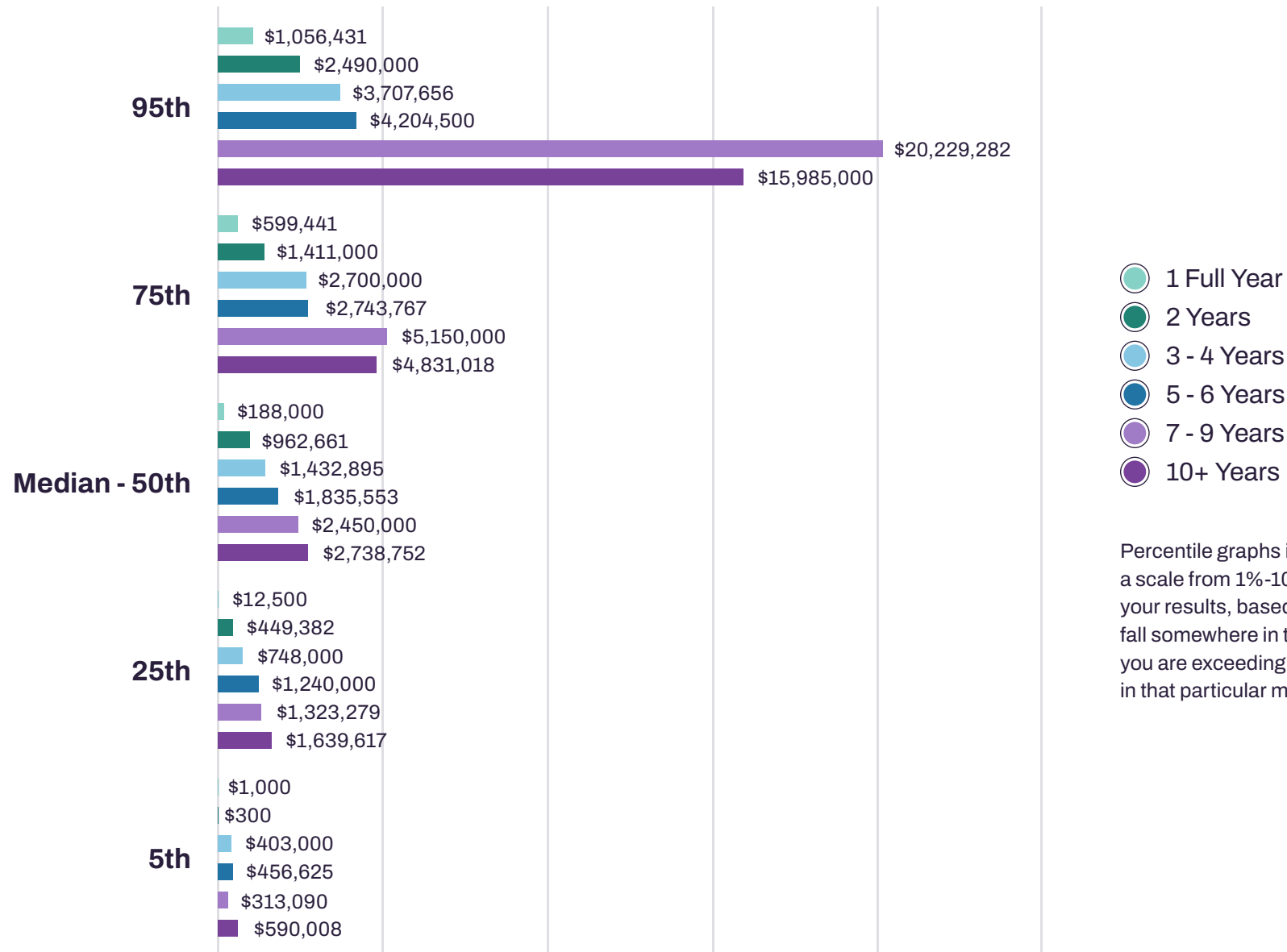
Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

Masters represent those home care providers who billed \$5M+ in annual revenue.



REVENUE PERCENTILE RANKINGS

4.8 Home Care Revenue Percentile Rankings for 2023 - Years in Business

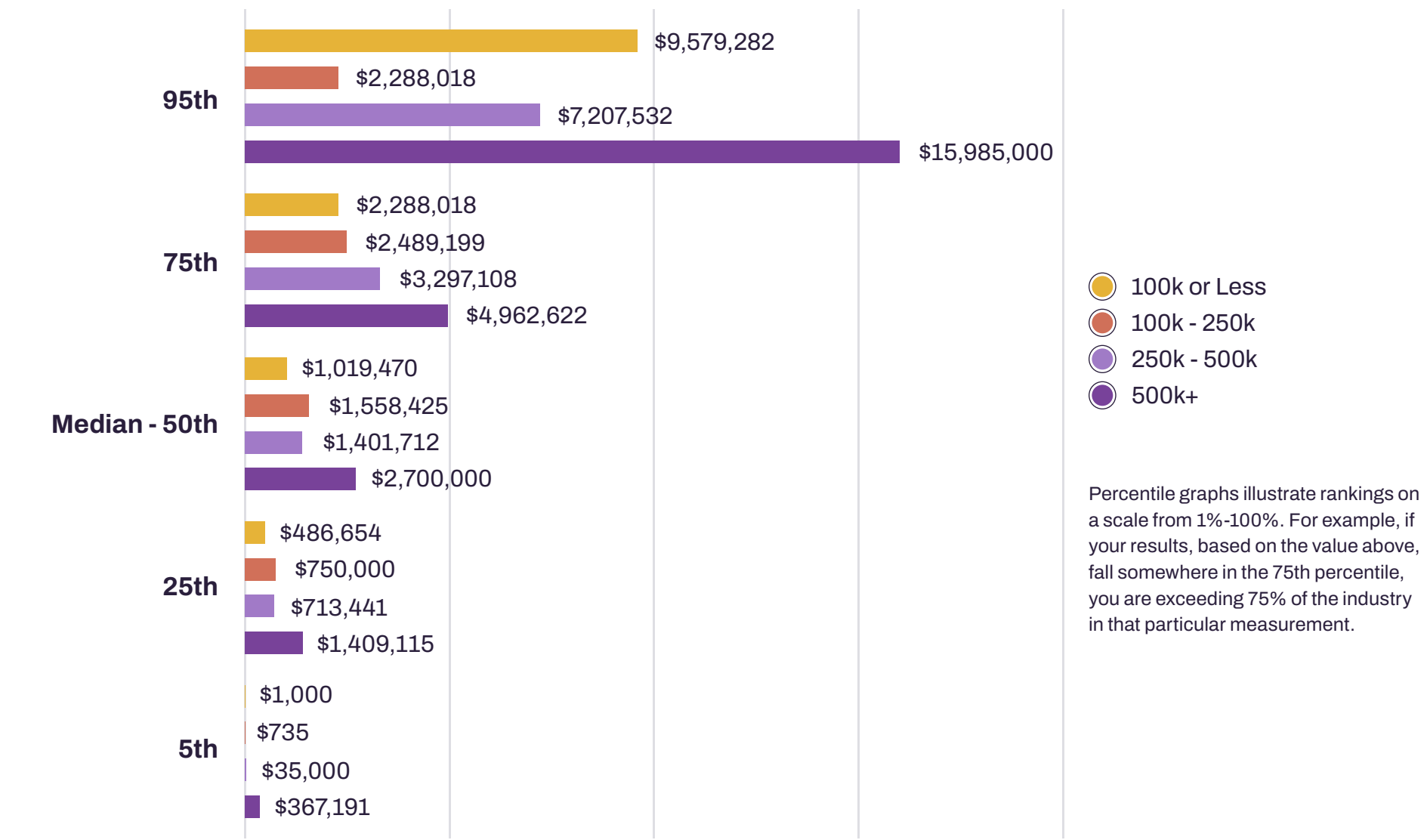


Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.



REVENUE PERCENTILE RANKINGS

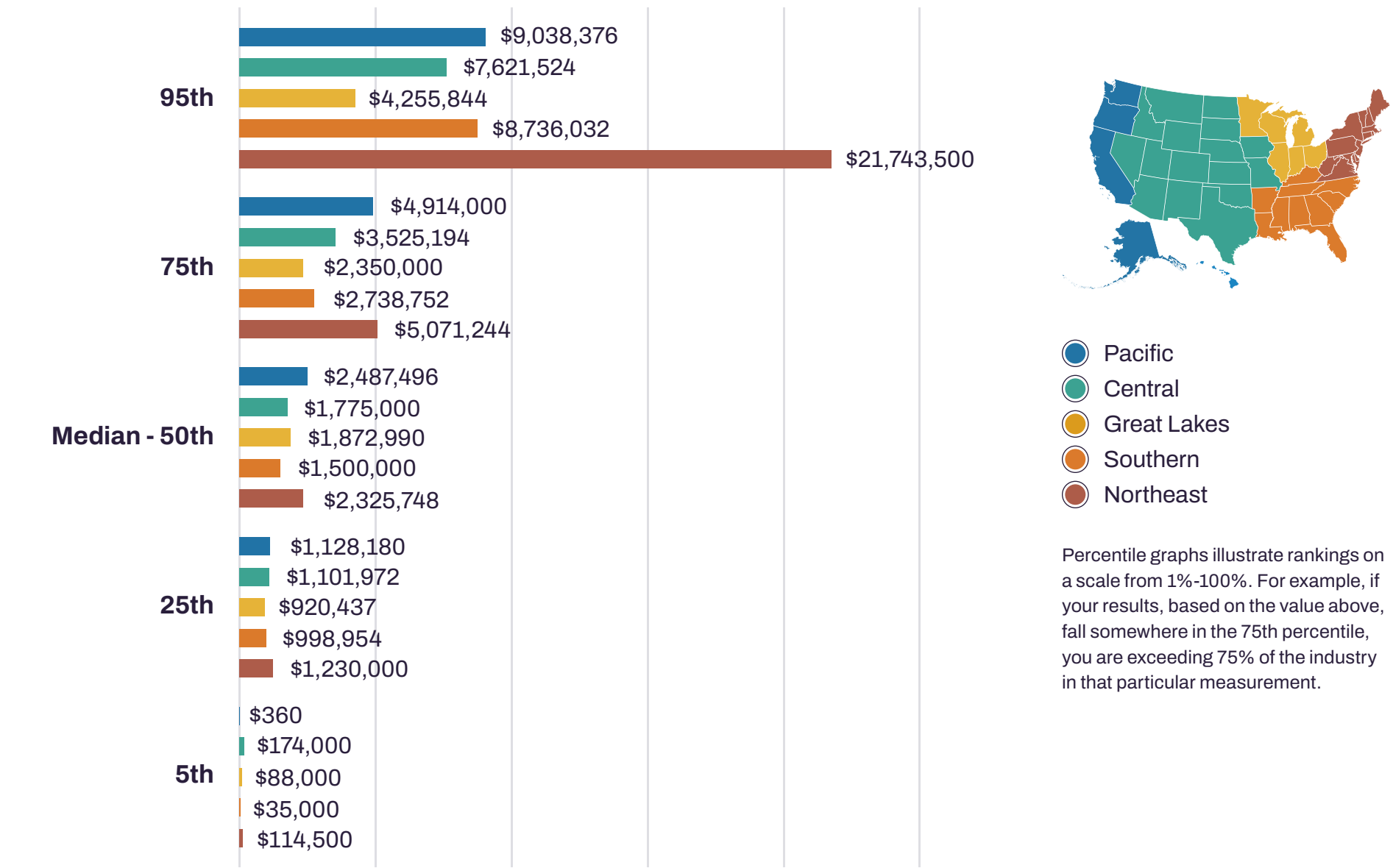
4.9 Home Care Revenue Percentile Rankings for 2023 - Population Served





REVENUE PERCENTILE RANKINGS

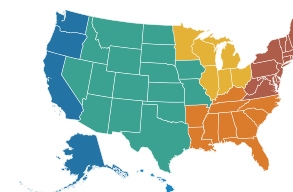
4.10 Home Care Revenue Percentile Rankings for 2023 - Geographic Region





4.11 Home Care Profit & Loss Comparison for 2023 - Geographic Region

Geographic Region (U.S.)	Pacific	Central	Great Lakes	Southern	Northeast
Median Annual Revenue	\$2,487,496	\$1,775,000	\$1,872,990	\$1,500,000	\$2,325,748
Direct Care Expenses					
Professional Caregiver wages	54.2%	50.0%	50.8%	52.6%	57.2%
Workers' Comp insurance	1.8%	0.7%	1.1%	1.0%	0.9%
Professional Caregiver benefits (health, 401k, supplemental, etc.)	1.0%	0.4%	1.2%	0.9%	0.7%
Professional Caregiver payroll taxes (employer taxes, etc.)	6.1%	4.8%	5.0%	4.6%	5.5%
Professional Caregiver reimbursements (mileage, meals, etc.)	0.5%	0.5%	0.5%	0.4%	0.4%
Professional Caregiver ongoing training (not initial training)	0.2%	0.3%	0.4%	0.3%	0.2%
*Other direct care expenses not listed	0.2%	0.4%	0.3%	0.2%	0.2%
Total Direct Care Expenses	63.9%	56.9%	59.3%	60.1%	65.1%
Professional Caregiver Recruitment & Retention Expenses					
Professional Caregiver job ads, online recruitment sites, postings, etc.	0.3%	0.4%	0.6%	0.4%	0.3%
Professional Caregiver background checks and screenings	0.1%	0.2%	0.1%	0.2%	0.1%
Professional Caregiver retention (bonuses, recognition program, etc.)	0.3%	0.2%	0.2%	0.3%	0.2%
Professional Caregiver onboarding and initial training	0.2%	0.2%	0.4%	0.2%	0.3%
Team wages associated w/ recruiting/retaining professional caregivers	1.6%	1.0%	1.7%	1.9%	1.5%
Pre-employment assessments	0.1%	0.2%	0.1%	0.4%	0.1%
All other expenses related to recruiting/retaining professional caregivers	0.3%	0.1%	0.3%	0.1%	0.1%
Total Caregiver Recruitment & Retention Expenses	2.9%	2.4%	3.4%	3.6%	2.6%
Sales & Marketing Expenses					
Traditional advertising (radio, print, etc.)	0.3%	0.4%	0.5%	0.2%	0.1%
Internet advertising (Google Ads, paid ads on Facebook, etc.)	0.4%	0.5%	0.5%	0.3%	0.3%
Networking and events (community, gifts, etc.)	0.2%	0.2%	0.3%	0.2%	0.1%
Search Engine Optimization (SEO)	0.3%	0.4%	0.5%	0.6%	0.2%
Sales rep salaries	1.8%	3.1%	2.7%	2.6%	1.8%
Sales rep bonuses and perks	0.2%	0.5%	0.1%	0.4%	0.4%
Lead Generation websites (Caring.com, etc.)	0.3%	0.4%	0.6%	0.5%	0.2%
All other marketing-related expenses (consulting, etc.)	0.2%	0.7%	0.5%	0.4%	0.2%
Total Sales & Marketing Expenses	3.6%	6.3%	5.7%	5.2%	3.4%
Operating Expenses					
Rent, maintenance, and utilities	1.7%	1.8%	2.1%	1.7%	1.4%
Office support wages (admins, schedulers, HR staff, nurses)	8.5%	8.3%	8.6%	6.8%	7.9%
Executive team wages (exclude all owners)	3.5%	3.3%	3.8%	5.7%	3.6%
Scheduling software, including telephony	0.4%	0.4%	0.5%	0.4%	0.3%
Franchise royalty fees (if applicable)	5.2%	4.8%	4.7%	5.0%	4.3%
Association/membership dues (if applicable)	0.1%	0.1%	0.1%	0.1%	0.1%
Travel/meals/entertainment expenses	0.3%	0.3%	0.6%	0.3%	0.4%
*Other operating expenses (exclude owners' salary and benefits)	2.2%	2.9%	6.1%	5.0%	3.2%
Total Operating Expenses	21.7%	21.9%	26.4%	25.0%	21.1%



For definitions, please refer to "Key Profit & Loss Notes" on page 8.

The percentages in the table represent a percent of revenue for each income and expense category. Also, these are median percentages (taking the middle number of the group), and therefore, if an expense says 0.0%, this doesn't necessarily mean that the value is 0.0%. 0.0% was simply the median number of the group being represented.

Net Profit or Net Ordinary Income is not shown in the key profit and loss comparisons, as only key expenses are represented, rather than all expenses incurred.

*Expense Examples

Professional Caregiver payroll taxes - *employer taxes, unemployment insurance, etc.*

Professional Caregiver retention - *bonuses, recognition program, satisfaction management, etc.*

Networking and events - *community, gifts, conventions, trade shows/marketing to clients, etc.*



4.12 Home Care Profit & Loss Comparison for 2023 - Number of Locations

For definitions, please refer to “Key Profit & Loss Notes” on page 8.

The percentages in the table represent a percent of revenue for each income and expense category. Also, these are median percentages (taking the middle number of the group), and therefore, if an expense says 0.0%, this doesn't necessarily mean that the value is 0.0%. 0.0% was simply the median number of the group being represented.

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*Expense Examples

Professional Caregiver payroll taxes - *employer taxes, unemployment insurance, etc.*

Professional Caregiver retention - *bonuses, recognition program, satisfaction management, etc.*

Networking and events - *community, gifts, conventions, trade shows/marketing to clients, etc.*

Number of Locations	1 Location	2 Locations	3+ Locations
Median Annual Revenue	\$1,608,882	\$2,768,503	\$4,083,992
Direct Care Expenses			
Professional Caregiver wages	53.0%	55.9%	51.3%
Workers' Comp insurance	1.0%	1.3%	0.8%
Professional Caregiver benefits (health, 401k, supplemental, etc.)	0.7%	0.9%	1.0%
Professional Caregiver payroll taxes (employer taxes, unemployment insurance, etc.)	5.2%	5.8%	5.0%
Professional Caregiver reimbursements (mileage, meals, etc.)	0.5%	0.4%	0.4%
Professional Caregiver ongoing training (not initial training)	0.2%	0.2%	0.3%
*Other direct care expenses not listed	0.3%	0.2%	0.2%
Total Direct Care Expenses	60.9%	64.7%	59.0%
Professional Caregiver Recruitment & Retention Expenses			
Professional Caregiver job ads and networking	0.4%	0.3%	0.3%
Professional Caregiver background checks and screenings	0.2%	0.2%	0.1%
Professional Caregiver retention (bonuses, recognition program, satisfaction mgmt)	0.3%	0.2%	0.1%
Professional Caregiver onboarding and initial training	0.3%	0.2%	0.2%
Team wages associated with recruiting and retaining professional caregivers	1.7%	1.7%	1.3%
Pre-employment assessments	0.1%	0.1%	0.1%
All other expenses related to recruiting and retaining professional caregivers	0.2%	0.1%	0.2%
Total Professional Caregiver Recruitment & Retention Expenses	3.1%	2.7%	2.3%
Sales & Marketing Expenses			
Traditional advertising (radio, print, etc.)	0.3%	0.3%	0.1%
Internet advertising (Google Ads, paid ads on Facebook, etc.)	0.5%	0.2%	0.4%
Networking and events (community, gifts, conventions, etc.) clients, etc.	0.2%	0.2%	0.2%
Search Engine Optimization (SEO)	0.5%	0.4%	0.2%
Sales rep salaries	2.5%	2.5%	2.2%
Sales rep bonuses and perks	0.3%	0.5%	0.4%
Lead generation websites (Caring.com, etc.)	0.4%	0.3%	0.1%
All other marketing-related expenses (consulting, etc.)	0.5%	0.3%	0.4%
Total Sales & Marketing Expenses	5.1%	4.6%	3.9%
Operating Expenses			
Rent, maintenance, and utilities	1.7%	1.7%	1.4%
Office support wages (admins, schedulers, HR staff, nurses)	8.1%	8.0%	8.4%
Executive team wages (exclude all owners)	4.3%	3.8%	3.0%
Scheduling software, including telephony	0.4%	0.4%	0.4%
Franchise royalty fees (if applicable)	4.9%	5.0%	4.8%
Association/membership dues (if applicable)	0.1%	0.1%	0.1%
Travel/meals/entertainment expenses	0.4%	0.3%	0.2%
*Other operating expenses (exclude owners' salary and benefits)	3.3%	3.3%	3.3%
Total Operating Expenses	23.1%	22.5%	21.6%



4.13 Home Care Profit & Loss Comparison for 2023 - Revenue Ranges

*See previous page for expense examples.

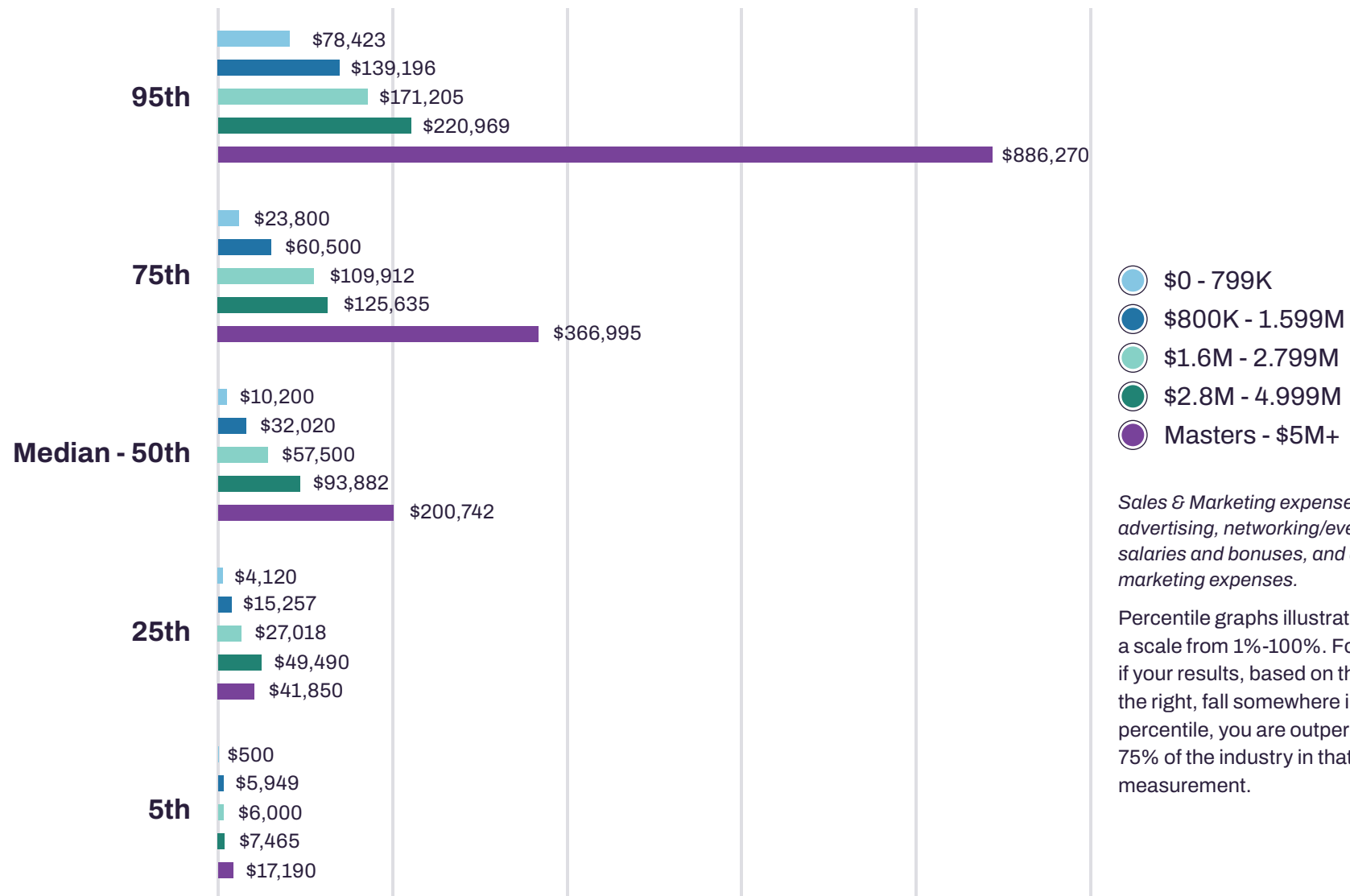
Masters

Revenue Range	\$0 - \$799K	\$800K - \$1.599M	\$1.6M - \$2.799M	\$2.8M-\$4.999M	\$5M+
Median Annual Revenue	\$306,180	\$1,160,000	\$2,067,909	\$3,560,000	\$7,600,524
Direct Care Expenses					
Professional Caregiver wages	55.3%	53.2%	52.6%	52.2%	55.3%
Workers' Comp insurance	1.7%	1.0%	1.2%	0.8%	1.0%
Professional Caregiver benefits (health, 401k, supplemental, etc.)	0.8%	0.7%	0.7%	1.1%	0.9%
Professional Caregiver payroll taxes (employer taxes, insurance, etc.)	6.2%	4.8%	5.6%	4.6%	5.2%
Professional Caregiver reimbursements (mileage, meals, etc.)	0.6%	0.6%	0.3%	0.3%	0.4%
Professional Caregiver ongoing training (not initial training)	0.4%	0.3%	0.2%	0.2%	0.1%
*Other direct care expenses not listed	0.8%	0.4%	0.4%	0.2%	0.2%
Total Direct Care Expenses	65.8%	60.9%	61.1%	59.5%	63.1%
Professional Caregiver Recruitment & Retention Expenses					
Professional Caregiver job ads, online recruitment sites, postings, etc.	1.3%	0.5%	0.4%	0.3%	0.2%
Professional Caregiver background checks and screenings	0.3%	0.2%	0.2%	0.1%	0.1%
Professional Caregiver retention (bonuses, recognition program, etc.)	0.3%	0.3%	0.2%	0.2%	0.2%
Professional Caregiver onboarding and initial training	0.8%	0.2%	0.2%	0.2%	0.1%
Team wages associated w/ recruiting/retaining professional caregivers	2.4%	2.3%	1.7%	1.3%	1.0%
Pre-employment assessments	0.4%	0.2%	0.1%	0.2%	0.0%
All other expenses related to recruiting/retaining professional caregivers	0.3%	0.3%	0.1%	0.1%	0.1%
Total Professional Caregiver Recruitment & Retention Expenses	5.8%	4.0%	2.9%	2.4%	1.7%
Sales & Marketing Expenses					
Traditional advertising (radio, print, etc.)	0.4%	0.5%	0.3%	0.1%	0.1%
Internet advertising (Google Ads, paid ads on Facebook, etc.)	1.2%	0.6%	0.4%	0.2%	0.2%
Networking and events (community, gifts, conventions, etc.)	0.5%	0.2%	0.2%	0.2%	0.1%
Search Engine Optimization (SEO)	2.5%	0.6%	0.6%	0.2%	0.1%
Sales rep salaries	9.0%	4.1%	2.8%	1.8%	1.4%
Sales rep bonuses and perks	0.2%	0.9%	0.3%	0.3%	0.3%
Lead generation websites (Caring.com, etc.)	1.8%	0.5%	0.3%	0.2%	0.0%
All other marketing-related expenses (consulting, etc.)	1.4%	0.5%	0.5%	0.3%	0.2%
Total Sales & Marketing Expenses	17.1%	7.8%	5.4%	3.2%	2.5%
Operating Expenses					
Rent, maintenance, and utilities	3.4%	2.1%	1.5%	1.5%	1.1%
Office support wages (admins, schedulers, HR staff, nurses)	11.9%	8.1%	8.1%	7.5%	6.0%
Executive team wages (exclude all owners)	5.8%	7.1%	4.1%	3.2%	2.9%
Scheduling software, including telephony	1.2%	0.4%	0.4%	0.3%	0.3%
Franchise royalty fees (if applicable)	5.7%	5.0%	4.9%	4.8%	3.5%
Association/membership dues (if applicable)	0.3%	0.1%	0.1%	0.1%	0.1%
Travel/meals/entertainment expenses	0.8%	0.5%	0.4%	0.3%	0.1%
*Other operating expenses (exclude owners' salary and benefits)	4.7%	2.6%	4.6%	3.9%	3.2%
Total Operating Expenses	33.8%	25.8%	23.9%	21.5%	17.1%



OTHER EXPENSES

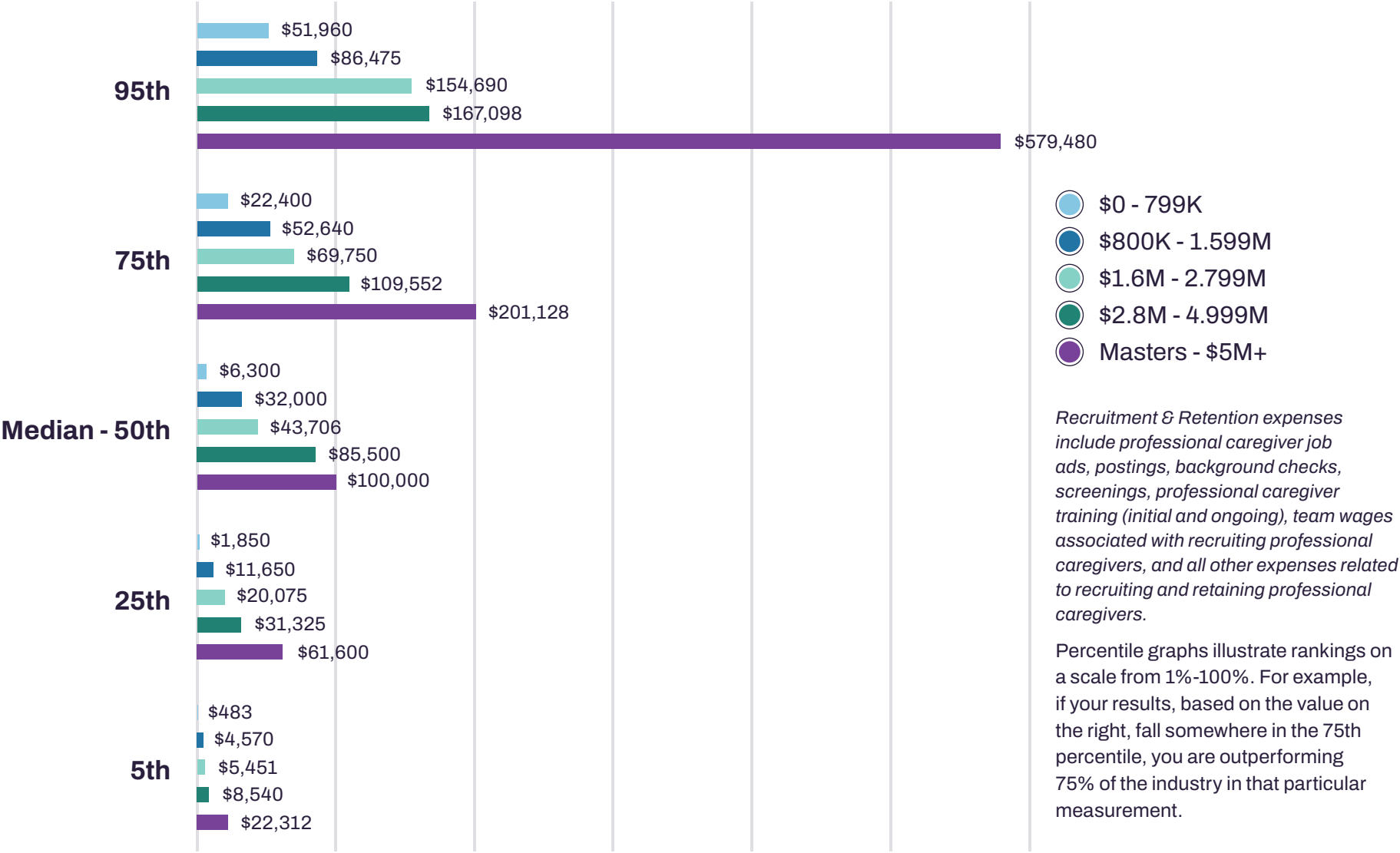
4.14 Home Care Sales & Marketing Expenses Percentile Ranking for 2023 - Revenue Ranges





OTHER EXPENSES

4.15 **Home Care** Recruitment & Retention Expenses Percentile Ranking for 2023 - Revenue Ranges





REVENUE GENERATED BY SERVICE OFFERINGS

4.16 **Home Care** Historical Revenue Generated by Service Offerings

Service Offerings	2023	2022	2021	2020
Hourly Care	85.6%	86.3%	86.9%	85.9%
Live-In Care	8.3%	7.4%	7.1%	8.5%
Skilled Nursing	1.4%	1.5%	2.1%	2.0%
Health Care Staffing Services	0.7%	1.3%	1.3%	1.3%
Geriatric Care	0.2%	0.5%	0.9%	0.4%
Alert Monitoring Services	0.3%	0.1%	0.3%	0.4%
Medicare Home Health	0.5%	1.3%	0.3%	0.3%
Other Services	1.2%	1.6%	0.9%	1.2%

Survey participants were asked, "What percent of your annual revenue came from the following service offerings?"

Other Service Offerings Mentioned:

- Adult Foster Care
- Child Care
- CNA Classes
- Placement Services
- Skilled Nursing
- Task-Based Care
- Transportation
- VA Billed Hourly

PAYER SOURCE PERCENTAGES

4.17 **Home Care** Historical Payer Source Percentage of Revenue

Service Offerings	2023	2022	2021	2020
Private pay	59.6%	64.3%	64.6%	65.3%
Long-term care insurance	10.0%	10.9%	11.6%	11.7%
Medicaid Waiver program	3.9%	7.1%	6.8%	8.1%
Veterans Administration programs	9.7%	7.1%	6.1%	4.9%
Billed Medicaid directly	1.5%	2.6%	3.3%	2.5%
Area Agencies on Aging (AAA)	0.9%	1.5%	1.6%	1.6%
Managed Care Organization (MCO)	0.8%	1.7%	1.2%	2.1%
Workers' Compensation	0.6%	0.7%	1.1%	0.4%
Trusts/banks	0.3%	0.4%	0.6%	0.7%
Other Insurance	0.3%	0.7%	0.5%	0.5%
Medicare reimbursement	0.5%	0.1%	0.4%	0.6%
Billed hospitals directly	0.5%	0.2%	0.3%	0.1%
Medicare Advantage reimbursement	0.2%	0.1%	0.2%	0.0%
Accountable Care Organization (ACO)	0.2%	0.5%	0.1%	0.5%
Other	1.1%	2.2%	1.3%	1.4%

Survey participants were asked, "What percent of your annual revenue came from the following payer sources?"

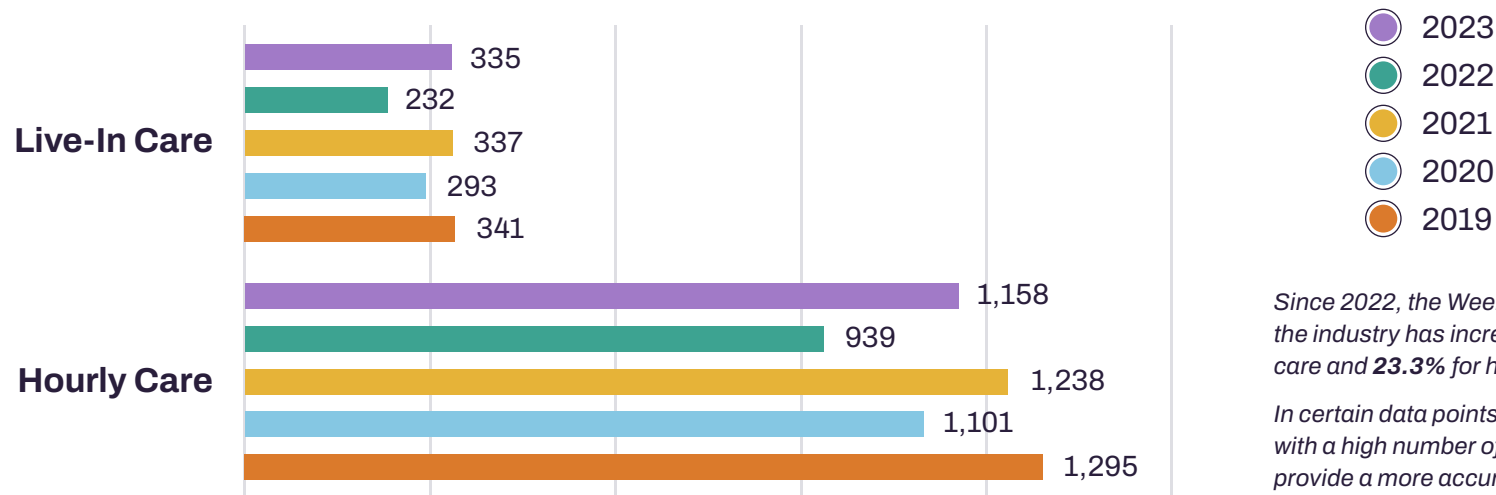
Other Payer Sources Mentioned:

- Bright Horizons
- Charity Care
- Employer Employee Assistance Program
- Family Caregiver Resource Centers (CA)
- Hospice
- Local County-level Respite Program
- Medical Staffing Businesses
- Non-Profit Support Groups
- Other State Programs
- PACE
- PDN Services
- Respite Vouchers
- Transportation



BILLING METHODS

4.18 Home Care Historical Median Weekly Billable Hours

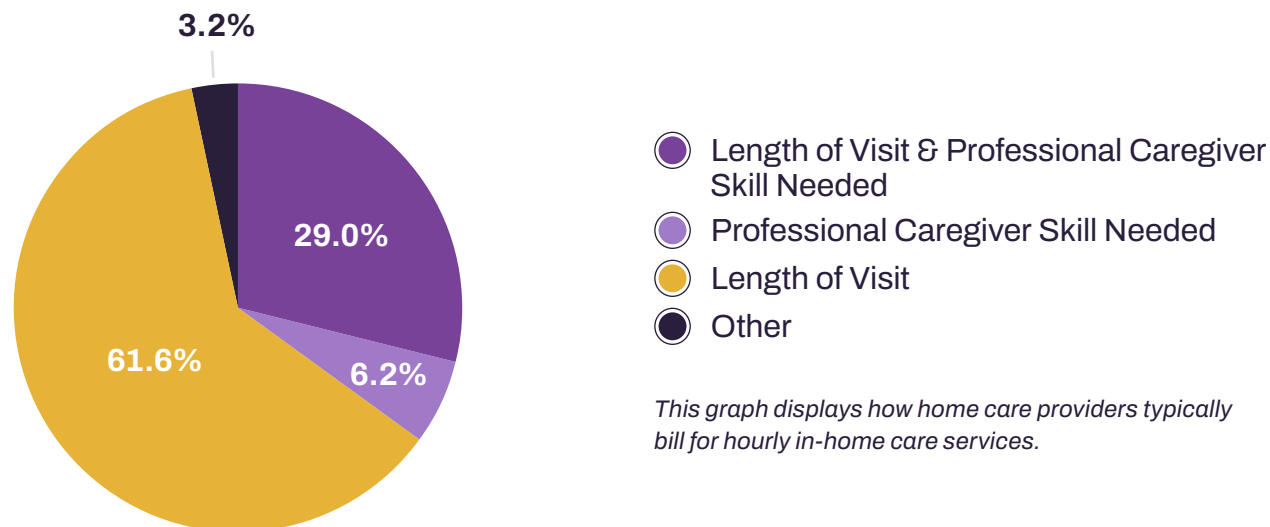


Since 2022, the Weekly Median Billable hours for the industry has increased by **44.4%** for live-in care and **23.3%** for hourly care.

In certain data points, data from a large franchise with a high number of participants was weighted to provide a more accurate picture of the post-acute care industry. Historical data was not updated.

BILLING METHODS

4.19 Home Care Service Billing Methods for 2023



This graph displays how home care providers typically bill for hourly in-home care services.



BILLING RATES

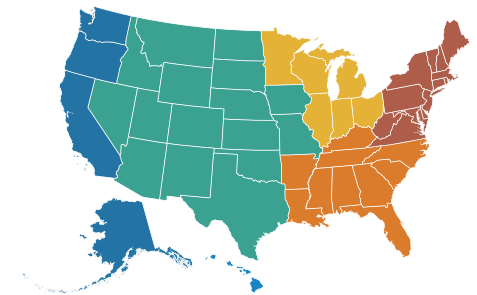
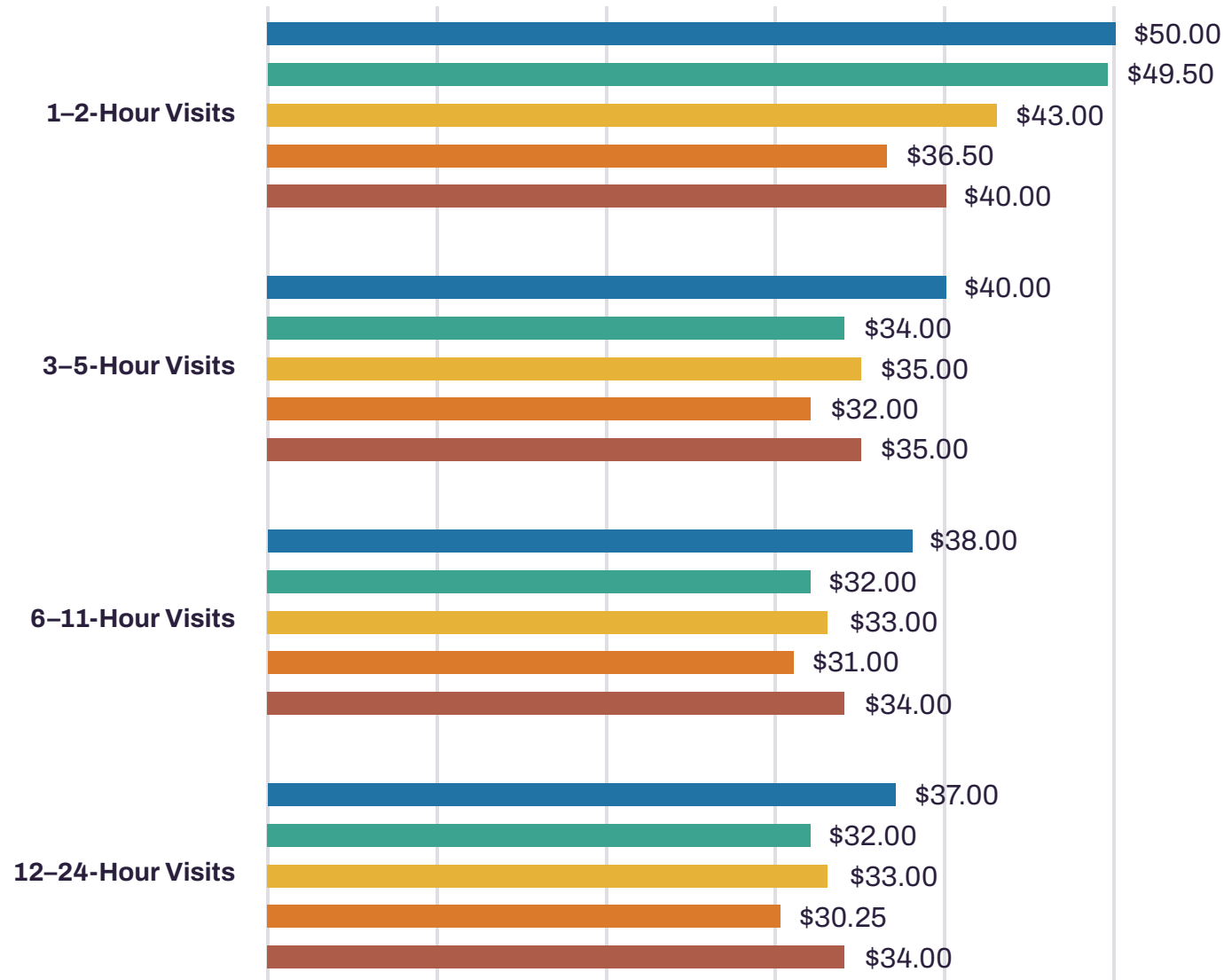
4.20 **Home Care** Historical Median Billing Rates by Length of Visit





BILLING RATES

4.21 Home Care Median Billing Rates by Length of Visit for 2023 - Geographic Region



- Pacific
- Central
- Great Lakes
- Southern
- Northeast



BILLING RATES

4.22 Home Care Median Billing Rates by Care Professional Skill Level for 2023 - Percentile Ranking





BILLING RATES

4.23 Home Care Care Professional Skill Level Billing Rates for 2023 - Geographic Region



4 Tips to Erase Shrinking Profit Margins



Steve “The Hurricane” Weiss

Founder and CEO
Home Care Evolution



“Retaining your care staff is **the number one way to increase your profits** without adjusting anything else to your organization.”

The biggest takeaway from the 2023 HCP Benchmarking Report was that the median profit margin for all agencies was just shy of 10% at 9.7%. While this number is higher than it was last year, it still shows the sign of an industry where its agencies are one mistake away from going out of business. If you studied small business economics in college, you know that a small business should profit between 18 and 22% in order to grow and thrive. These resources are far greater than just money in the business owner’s pocket.

Rather, these resources can be used:

- to increase salaries of hard-working staff.
- expand to open multiple locations to serve more patients.
- as retention pieces to keep our care staff working for us.

It is imperative that the trend continues to grow. As a result, here are four tips that you can do to help increase your profit margin this year.



1. Charge More for Service

This sounds obvious, but I also know this is the most unpopular decision of them all. Our patients need us. We don't like charging more money. Most people don't like charging what they currently are charging. In addition to this, we also understand that rising costs diminish the number of people who can afford our services.

I understand. However, with the economy being what it is, everything has gone up significantly. Airfare, food, utilities, rent and housing, etc. You name it. The cost of goods has increased. The cost of services has increased. Therefore, the quick fix here is to increase what we're charging so that we can make up the difference.

This can be accomplished in two ways. First, *Urgent Start Situations*. When someone contacts you to start up care immediately (within 72 hours) this requires an "all-hands-on-deck" scenario, where everyone in your organization must stop their day-to-day responsibilities and work on staffing this case. There is a huge cost associated with the loss in productivity when this happens. Charge a startup fee in this instance to cover that cost (\$100–\$500 depending on your market).

Second, *Sliding Scale*. This mirrors what assisted living communities have always done. They charge a fee that is relative to the level of care required to manage their resident. The same applies here. There is a huge difference in the care needs of a "companion-level" patient versus a "medically complex" patient. We should be charging the difference (and compensating the assigned caregiver for their expertise).

These two small changes will make an immediate impact to both the bottom-line and your ability to staff those cases with ease.



2. Increase Billable Hours Per Client

In last year's report, the median agency surveyed had 1 scheduler for every 731 billable hours per agency. This is a very, very low number from what my clients experience. Agencies really should be closer to 1,200, 1,500, maybe even 2,000 hours per scheduler. Another stat showed how many office staff members there were for the revenue generated. This statistic showed that agencies with less than \$3M in annual revenue were overstaffed, by my standards, having 3 staff members for every million in total revenue.

Why do these stats matter? Because it shows that most agencies surveyed have a low number of hours per week per client. (I would guesstimate around 20 hours/client/week.) If you have 50 patients on your census, it requires a certain number of office staff members to manage. However, if you have 50 patients that are getting 15 hours of care, this comes to only 750 hours per week. Conversely, when you have the same 50 patients but averaging 40 hours of care, this comes to 2,000 hours billed, which is significantly more revenue. Most of my clients that I work with now average 40 hours per week per patient, which is significantly higher than the industry-standard. In order to accomplish this, you must have a strong sales and marketing department.

3. Manage Care Staff Turnover

One of the statistics in the report showed the revenue generated per professional caregiver. Across the industry, in 2023, revenue generated per care professional declined from what it was the year before, especially in the Masters subcategory (those who make over \$5M in revenue). In 2022, Masters had an average employee generating \$28,000. However, last year in 2023 the report shows that the Masters caregivers generated closer to \$20,000 which is an \$8,000 reduction. This is because of the increase in overall caregiver turnover as the industry rose by almost 8%, now to 77%.

The goal that I have for all of my clients is to be able to retain an employee so that they service 3 patients during their tenure with the company. If your patients are averaging 40 hours per week as mentioned in the previous tip and your care staff are able to service 3 patients, meaning they transition from their first patient to their second and then eventually from their second to their third, this will significantly increase the revenue generated per employee, making your business much more efficient because of your ability to retain care staff.

Retaining your care staff is the number one way to increase your profits without adjusting anything else to your organization. Simple operational adjustments, such as: have a longer cancellation period, making sure that you retain the caregiver's salaries between cases, offering shift work, and obviously having a steady flow of referrals coming in makes it easier to reassign care staff.

4. Take Responsibility Over Your KPIs

In many of the courses I teach my clients, I always start with knowing your KPIs, those Key Performance Indicators. When you manage your efficiencies and check your statistics on a quarterly basis, you can easily identify where you're leaving money on the table. For example, in sales and marketing, when people are spending money on Google AdWords but aren't checking their inquiries and conversions, this leaves almost an additional 50% of revenue on the table. Tracking your inquiries will go a long way to make your sales and marketing KPIs much more efficient.

In recruitment and retention, providers are throwing money at every possible way to get employees without tracking to see just how much money they spend on employee acquisition or what the efficiencies of those

employees are once they start working. Are you hiring care staff from places that cost a lot of money, only to continue producing a high turnover rate? Allocate those funds into sources with proven higher retention rates to make sure you're getting the most bang for your buck.

Finally, check to see if you're spending your money efficiently within all areas of your business. Are you spending too much money on our software? Are you spending too much money on things that overlap? Is your software working to its fullest capabilities to ensure you don't need to add other service providers to be able to operate business? Are you checking our merchant service fees? I had a client who was able to save \$20,000 by making a switch to a different merchant services provider simply because they charged a much lower fee for generating their sales revenue. All of these things add up at the end of the day. And if you're able to add 2% or 3% back to that bottomline without charging more because of these changes, it will have a huge impact on the overall profitability of your business.

With each tip you should be able to increase your profit by 2.5%, which will give you an extra 10% additional profit as your business operates profitably.

If you want help with how to do the things discussed here, check out our website homecareevolution.com.

ABOUT THE AUTHOR

Steve "The Hurricane" Weiss is a dynamic and entertaining public speaker, known for his expert knowledge in all things sales and marketing. From a young age, Steve has been driven to succeed and excelled across vastly different industries. Steve founded Hurricane Marketing Enterprises in 2012 with a goal to help other business owners around the globe.

Steve's passion is to lead business owners on the path to find people in need of their services and convert these prospects into clients. His company's mission statement is to help business owners increase their census, revenue, and profits. Through his programs and presentations, he has guided thousands of individuals to grow their organizations and continues to help them blow away the competition.

With his dedication and hard work, Steve has developed a foolproof program that enables start-up companies to quickly get ahead of the competition while helping existing businesses experience an explosive transformation. Many of his clients double and even triple annual revenue in as little as 6 months.

homecareevolution.com



ARTICLE

The How and Why of Payer Diversification in Home Care



Greg Bean, MHA

Vice President of Business Development
Paradigm Senior Services



“Expanding payer lines is **not just a strategic move; it is a necessity** for home care providers in today’s ever-changing home care space.”

For years, home care providers have relied heavily on one primary payer source, such as private pay. This was evident in the 2023 HCP Benchmarking Report with 64.3% of home care agency’s revenue stemming from private pay.

Relying solely on one payer source may simplify administrative processes and billing procedures; however, it’s a risky practice as it limits the provider’s ability to take advantage of evolving reimbursement structures and restricts their adaptability to changing regulatory landscapes.

Payer diversification has become an increasingly important strategy for home care providers. But what exactly is payer diversification and why is it necessary?

Payer diversification refers to the process of expanding a home care agency’s payer mix to include a variety of different payers, such as private-pay clients and government programs (i.e. Veterans Affairs, Medicaid, etc.).

Expanding payer lines is not just a strategic move; it is a necessity for home care providers in today’s ever-changing home care space.

Why Should You Diversify Your Payer Lines?

There are several benefits to diversifying your payer lines:

- 1. Risk Mitigation:** Diversifying payer sources is crucial for minimizing risk in home care agencies. Dependence on a single payer exposes your business to potential financial instability in the face of rate cuts, benefit reductions, or contract termination.
- 2. Competitive Advantage:** Working with payers that competitors may not be engaging with gives a competitive edge as an effective business strategy.
- 3. Higher Profitability:** Government payers such as Medicaid and the VA sometimes offer higher reimbursement rates.
- 4. Caregiver Retention:** Caregiver satisfaction and retention are enhanced through better compensation and increased hours.
- 5. Increased Referrals:** Government payers open avenues for increased revenue, referrals, and client acquisition.
- 6. Community Impact:** Government programs allow agencies to contribute to community welfare by providing essential services to Veterans and the underprivileged.

Let's look at a scenario:

Home care agencies relying solely on private-pay clients are vulnerable to economic downturns, potentially leading to a significant drop in clients who can no longer afford private-pay services. By securing a contract with the VA, providers adopt a more resilient approach, benefiting from the stability of fixed annual rates offered by government payers.

Accepting Veteran clients can bring increased profitability through the potential of higher reimbursement rates, which could open doors to more referrals and client acquisition. This, in turn, allows providers to improve caregiver recruitment and retention by offering fair compensation. Serving Veterans is not only an honor but also enhances the agency's reputation, making a positive impact on the community.

This scenario is a reality for many providers who have decided to expand their payer mix. So, how can home care providers diversify their payer lines, and what are the programs available to you?

There are [several programs available](#), and each runs differently with its own unique processes. In this article, we will provide a high-level overview of the Veterans Affairs (VA) and Medicaid programs.

Lucrative Payer Lines: Veterans Affairs (VA) and Medicaid

Lucrative payer lines such as Veterans Affairs (VA) and Medicaid can greatly benefit home care providers. Not only do they offer financial stability, they also play a pivotal role in facilitating access to vital home care services, ensuring providers can deliver quality care to those in need.

The Veterans Affairs (VA) Opportunity

The Department of Veterans Affairs (VA) offers various home care options for eligible Veterans, with two primary programs: the Aid & Attendance benefit and the VA Community Care Network's services, including Homemaker, Home Health Aide (HHA), and Respite services.

Aid & Attendance is a pension benefit for eligible wartime Veterans and their spouses, while the Community Care Network extends healthcare services to eligible Veterans outside the VA system.

The VA's Homemaker/HHA services encompass support with Activities of Daily Living (ADLs), and these in-home care services are delivered by VA community providers directly in the Veterans' homes. There are over [9 million Veterans](#) above the age of 65 enrolled in the VA healthcare system, which is a large pool of potential clients for home care agencies. Adding to the appeal of catering to Veterans, the VA offers highly attractive reimbursement rates in select states. Such competitive rates position the CCN as one of the most lucrative payer lines in the home care industry.

As care staff shortages continue to be one of the top threats facing home care providers, these potentially high rates could enable providers to provide fair compensation to their caregivers and improve retention rates. Making this an exceptional opportunity for home care providers that shouldn't be ignored.

How To Get Involved

The first step is to get credentialed. Depending on your state, you will fall into one of five regions, and the enrollment process varies depending on your location. If you are a post-acute care agency in regions 1, 2, or 3, you need to join the VA through Optum. For agencies in regions 4 and 5, the process goes through TriWest.

To begin with Optum, simply contact their call center to open a case. For TriWest, visit their website and fill out a form. The enrollment process typically takes 6–12 months, with the duration influenced by different factors like the urgency of provider requirements in a specific area or the prioritization of enrollment in other locations due to saturation.



The Medicaid Opportunity

Medicaid, a joint federal and state program, provides tailored home care coverage for qualifying low-income individuals and families. Eligibility is based on meeting specific criteria related to income, assets, and health.

The program varies by state and incorporates Home- and Community-Based Services (HCBS) waivers designed to address long-term care needs with a focus on cost-effectiveness, individual well-being, and personalized care plans. Additionally, many Medicaid beneficiaries are enrolled in Managed Care Organizations (MCOs), which deliver health benefits and supplementary services through contractual agreements.

Medicaid dominates the provision of Long-Term Supportive Services (LTSS) for adults at home, accounting for a massive 57% nationwide. With over [80 million U.S. citizens](#) benefiting from this public health program, its reach continues to grow.

Leveraging Medicaid presents a golden opportunity to diversify your payer lines and minimize risks by tapping into state, federal, and private payers. This move will not only boost your cash flow but also provide a much-needed dose of variety in the home care sector, which has traditionally been underserved.

Moreover, embracing Medicaid can work wonders for caregiver retention, thanks to the substantial number of authorized hours it brings to the table. Medicaid funding varies across states, but its appealing rates and large client base make it a significant payer source in the home care services landscape.

How To Get Involved

To get started with Medicaid, providers must submit an application to their state Medicaid agency. Medicaid credentialing requirements and processes differ from state to state, so make sure to communicate with your state's Medicaid agency or relevant Managed Care Organization (MCO).

The agency reviews the application and checks the provider's credentials. This includes their licenses, certifications, experience, education, and training. This ensures that providers are qualified to offer the services they want to provide under Medicaid.

Background checks are conducted, and some states may even require on-site visits as part of the process. Once credentials are verified and approved, providers are enrolled as Medicaid providers. They can now offer services to beneficiaries and get reimbursed for their services.

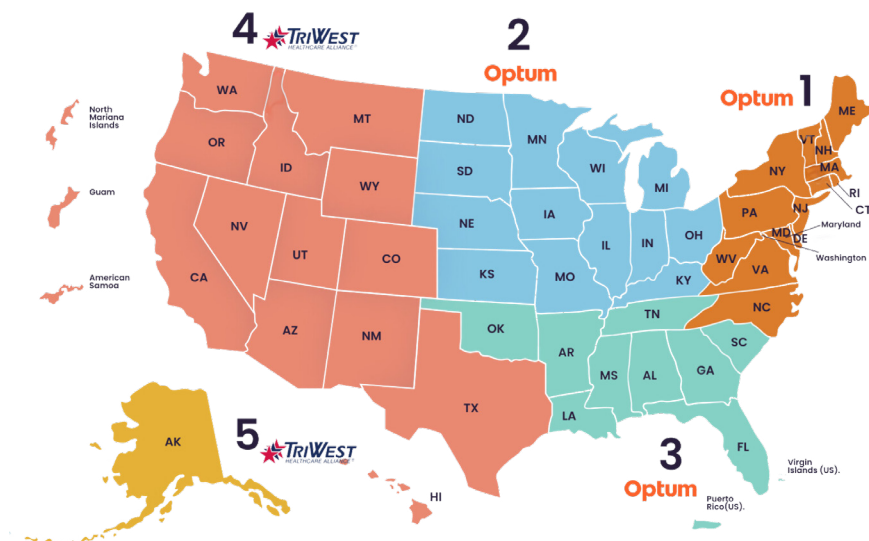
Empowering Home Care Providers

By diversifying payer lines through Veterans Affairs and Medicaid, home care providers can unlock a world of stability and growth. It's not just about the financial benefits, but also about expanding your client base and offering a more comprehensive range of services.

This strategic approach not only safeguards against financial vulnerabilities but also positions home care agencies to adapt to evolving industry demands, fostering resilience and ensuring a sustained positive impact on both the healthcare landscape and the well-being of the communities they serve. 🏡

ABOUT THE AUTHOR

Greg Bean began his career in health care at the young age of seventeen as a Hospital Corpsman in the United States Navy. After the Navy, he spent the next twelve years as a paramedic and critical care nurse. Greg has spent the last twenty-five years working in both skilled and private duty home care, including opening two private duty companies. Greg's positions include stints as a Director, Regional Director, and National Director of Operations for homecare and community-based operations such as Bayada, PSA and Butterfly Effect, and Visiting Angels. Greg currently lives in Central Pennsylvania and is the Vice President of Business Development at Paradigm.



How Griswold Uses Activated Insights Data for Franchise Success



Matt Ericksen

Senior Director of Sales
and Operations
Griswold Home Care



Since 2020, many new challenges have presented themselves to home care agencies. The stress of margin compression with rising labor costs coupled and private pay bill rate reaching their market caps, created stressful operating conditions for many agency owners. The importance of making well-informed business decisions to preserve a strong net profit becomes even more of a priority for many franchises and independent home care providers with the onset of these new market challenges. The question is, how do we make sense of the data and extract our insights while also managing a home care agency?

At Griswold, we've simplified data trends for our agencies by utilizing Activated Insights' benchmarking standards. Over the years, we have used data from the benchmarking report in creative ways to help our franchise owners.

Some of the ways we utilize data are as follows:

- We integrate the benchmarking data into internal dashboards and embed the P&L insights into forecasting models.
- We layer Activated Insights' Profit and Loss Comparison data over the profit and loss statement (P&L) for our agencies via forecasting models. This integration allows owners to understand their real-time financial health relative to historical industry performance starting on their first day of operation.
- We layer Activated Insights' benchmarking data into our P&L to unlock more accurate forecasting for our franchise owners. Owners can spend less time on business planning and more time on activities that drive revenue growth. This newfound value impacts daily operational processes significantly.



“As we look to the future, it is clear that **data will continue to play a pivotal role** in shaping the success of home care providers.”

- We provide data dashboards where owners can compare their bill rate versus industry and Griswold averages when deciding whether or not to adjust bill rates. With this data, they can immediately decide on a rate adjustment and implement a plan.
- We equip larger owners with modeling tools to accurately forecast their future performance based on master's level (\$5M+ in annual revenue). These tools are of great value to owners who operate larger agencies and perhaps have become more risk averse than a brand-new owner might be.
- We help owners quickly identify areas for improvement in various parts of the sales process by allowing them to benchmark their sales conversion rates against Activated Insights' data on Median Sales Conversions. Adjusting workflows or staff habits based on these insights has proven pivotal in helping new owners reach profitability far faster than previously experienced.

- We correlate the volume of inquiries versus the conversion rates of those inquiries then compare it to the average weekly revenue per client, per week against the performance of an individual owner. This allows our Franchise Business Coaches to quickly assess and prescribe strategies to support an owner's goals.

The role of data in the home care industry, as in many others, is becoming increasingly crucial for success. As we look to the future, it is clear that data will continue to play a pivotal role in shaping the success of home care providers. Griswold's approach highlights the importance of benchmarking and analytics in today's competitive landscape. For franchise owners within the Griswold network, this commitment to data-driven strategies ensures they are well-equipped to meet challenges on a daily basis with real-time data to capitalize on opportunities within the ever-evolving home care market. 

ABOUT THE AUTHOR

Matt Ericksen is a seasoned professional in the home healthcare industry, serving as the Director of Sales & Operations at Griswold since October 2020. His role includes managing talent acquisition and operations and driving franchisee growth. With over 14 years in customer service, sales, and operations, Matt has been instrumental in directing the development and aggressive growth of home health and home care businesses throughout the Northeast.

Before joining Griswold, Matt led a new BrightStar Care franchise to national recognition through a strong focus on unit profitability, client satisfaction, and community engagement. As Director of Operations, he led their start-up growth and created new service lines, significantly enhancing the franchise's market presence and revenue growth. Matt is a family man outside of his professional endeavors, spending time with his wife and daughters. His personal interests include home renovations, camping, and motorsports.

www.griswoldhomecare.com



The NAHC Advantage

FROM MEMBERS TO ADVOCATES

When you join the National Association for Home Care and Hospice (NAHC), your membership supports our advocacy efforts from Capitol Hill to your community — and connects you to member benefits designed to help you succeed.

We have consulted with our members and partners, who have identified three fundamental attributes distinguishing NAHC as a premier organization and a valuable industry resource.



ADVOCACY IN ACTION

We are the leading authority tracking and shaping legislative, regulatory, and policy issues affecting our members. We provide all the information, resources, and support you need.



DYNAMIC INDUSTRY COLLABORATION

Our members value real-time interaction with NAHC experts to solve their unique challenges and answer urgent questions—experience resources, news, and education designed to meet your needs and current trends.



BENEFITS DRIVING GROWTH

We aim to ensure you're leading your organization well in all areas, like finance, compliance, legal, workforce, regulations, etc. Discover countless ways to advance your organization with our help.

Renew Your NAHC Membership or Join Today!
NAHC.ORG/Join





SUMMARY

Operations

The Operations section reveals the largest threats facing your business in the coming year, according to the data, and what you need to do to prepare. It contains key data points to help you evaluate your day-to-day operations, identify opportunities for refinement, and build strategies to improve. In this section, you can evaluate the internal management of your company with information on turnover rates, staffing numbers, salaries and benefits, and readmission rates.



Section Contents

- 152** Service Offerings
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- 157** Customer Turnover Rates
- 161** Customer Average Length of Service
- 162** Customer Average Lifetime Value
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- 165** Sales Per Office Staff Employee
- 167** Weekly Billable Hours
- 168** Staffing Summary
- 173** Office Staff Turnover
- 175** Customer Reasons
- 176** Office Staff Benefits
- 177** Turning Down Customers
- 178** Business Accreditations
- 178** Live-In Care
- 179** Scheduling Softwares
- 180** Reputation Management

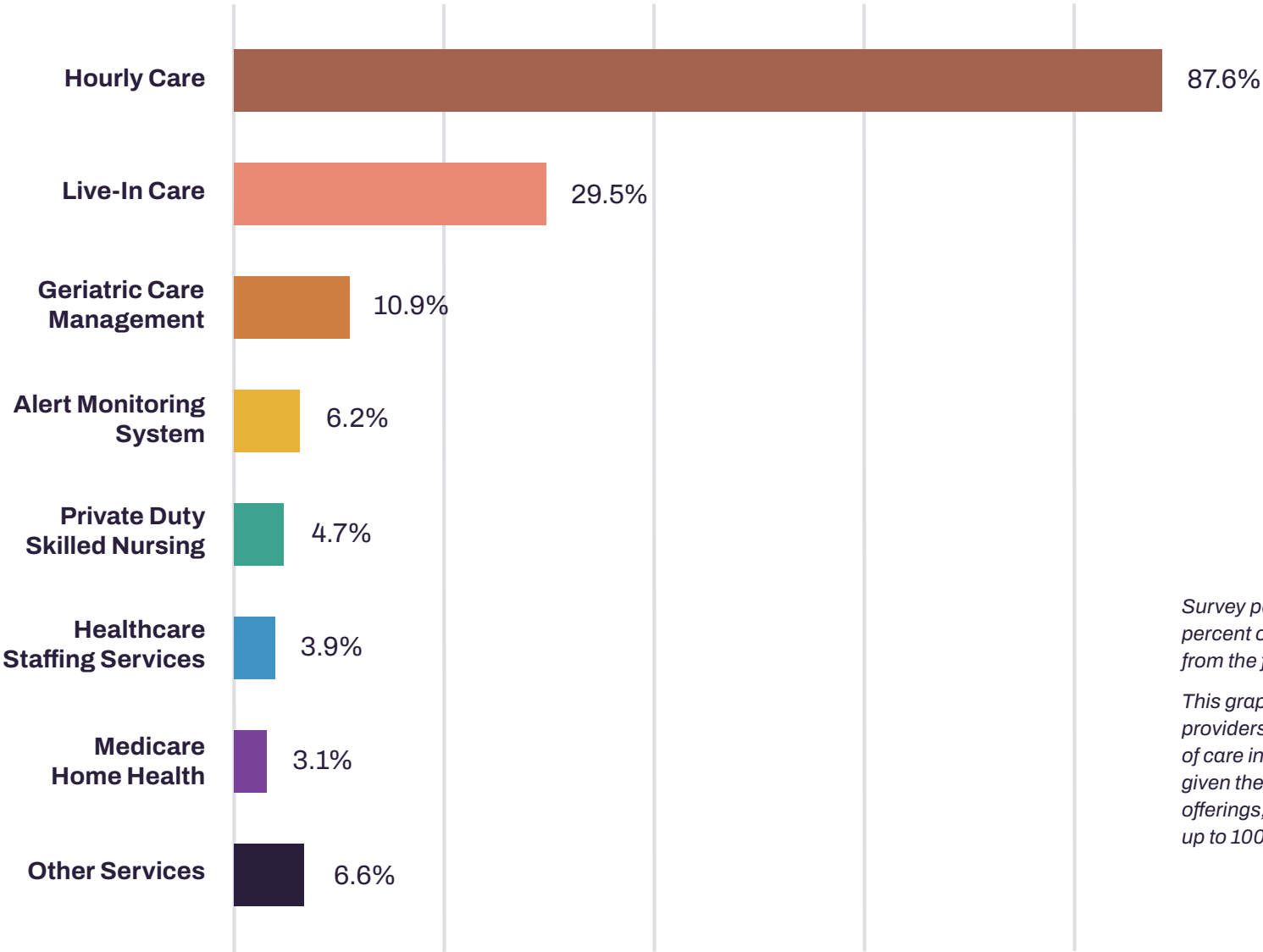
ARTICLES

- 181** *Mergers and Acquisitions (M&A) for Post-Acute Care Business Owners*
- 184** *The Challenges of Technology in Post-Acute Care: Managing Data, Compliance, and Changing Business Goals*



SERVICE OFFERINGS

5.1 Home Care Service Offerings for 2023



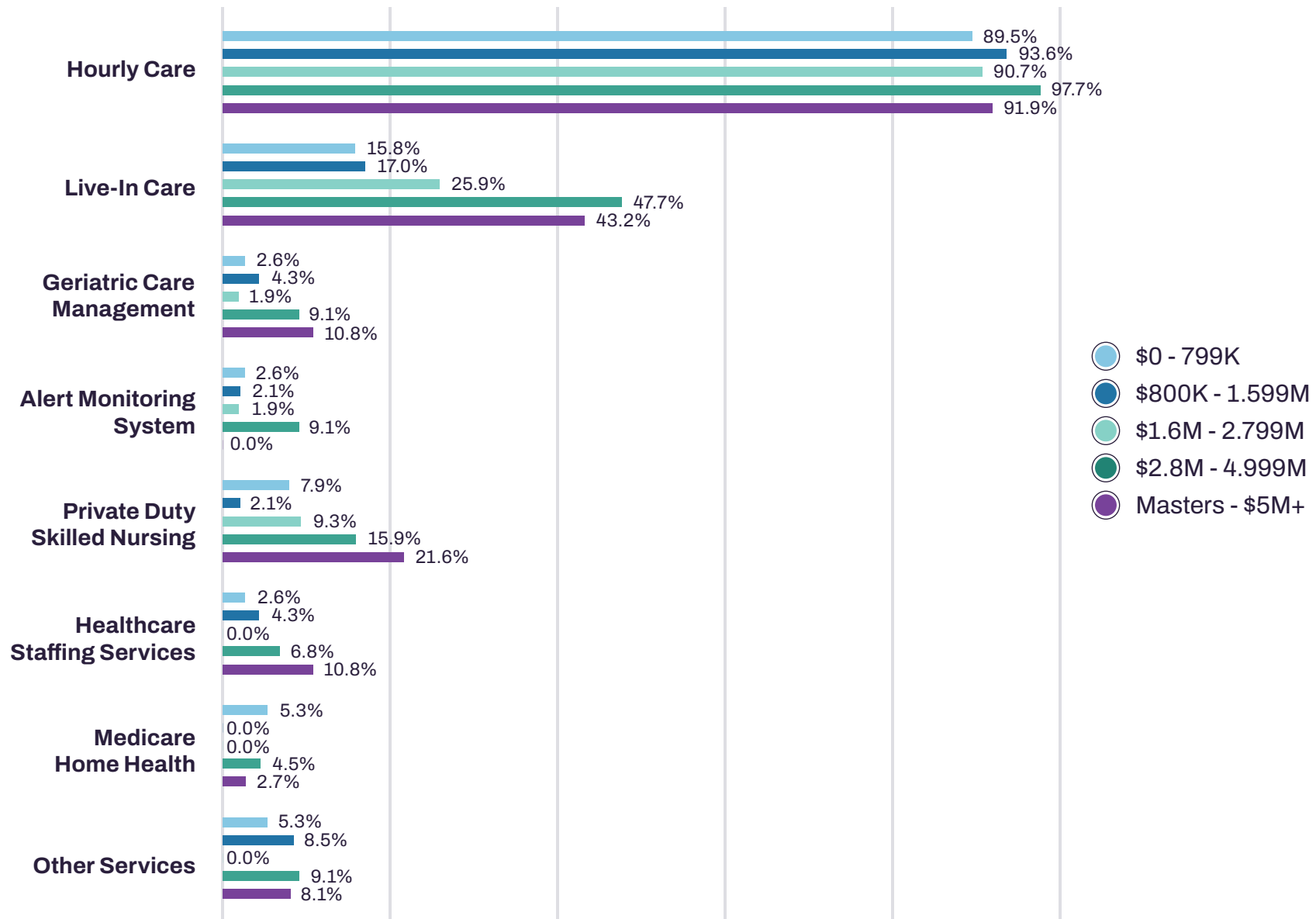
Survey participants were asked, “What percent of your revenue in 2023 came from the following services?”

This graph represents the percentages of providers who reported offering each type of care in 2023. Because providers were given the option to list multiple service offerings, these percentages may not add up to 100%.



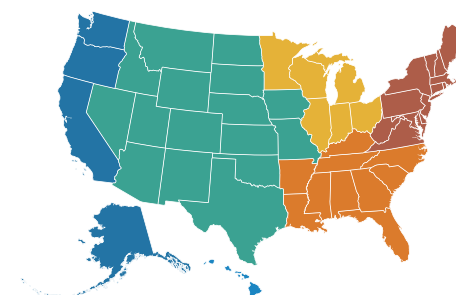
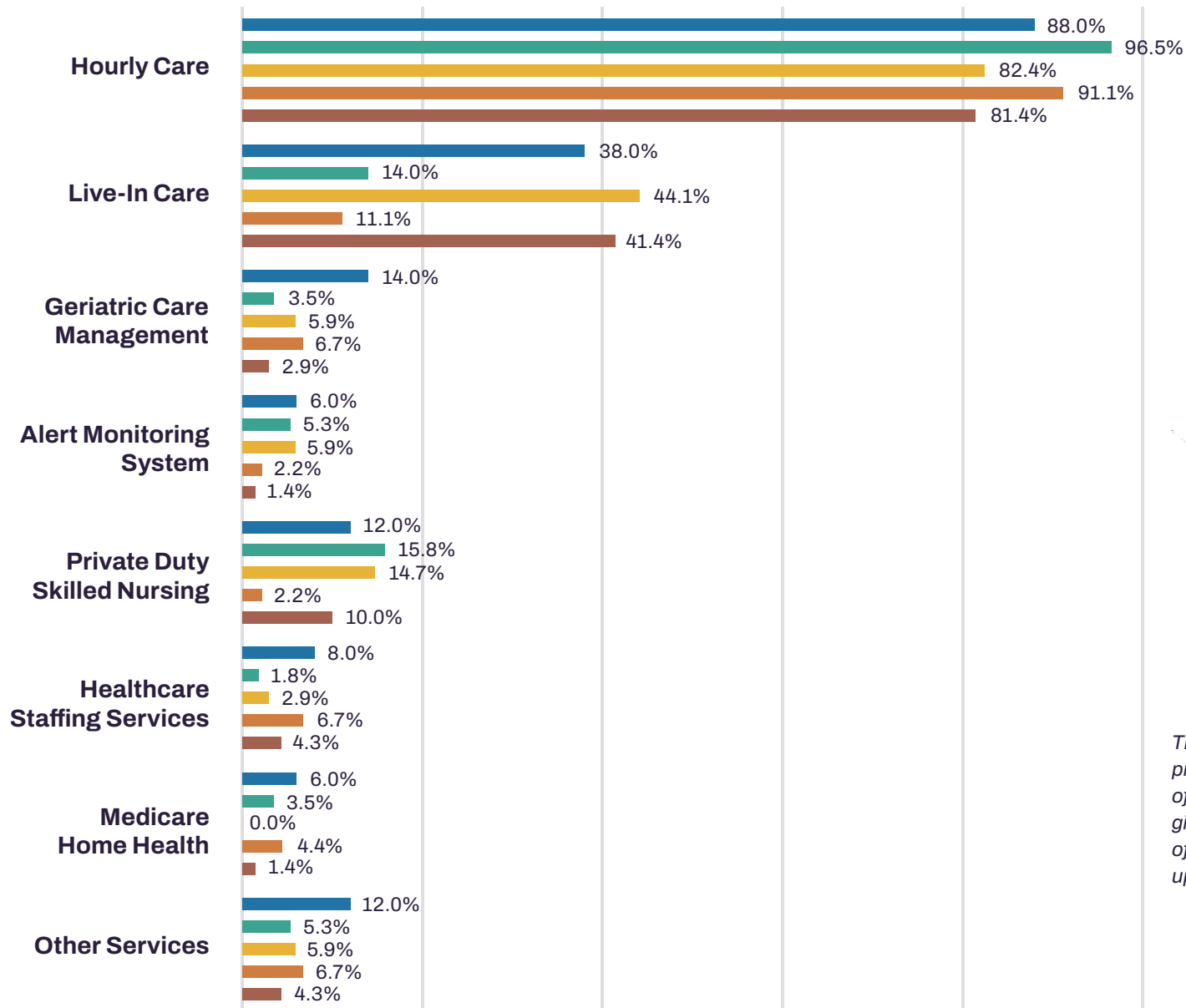
SERVICE OFFERINGS

5.2 Home Care Service Offerings for 2023 - Revenue Ranges



SERVICE OFFERINGS

5.3 Home Care Service Offerings for 2023 - Geographic Regions



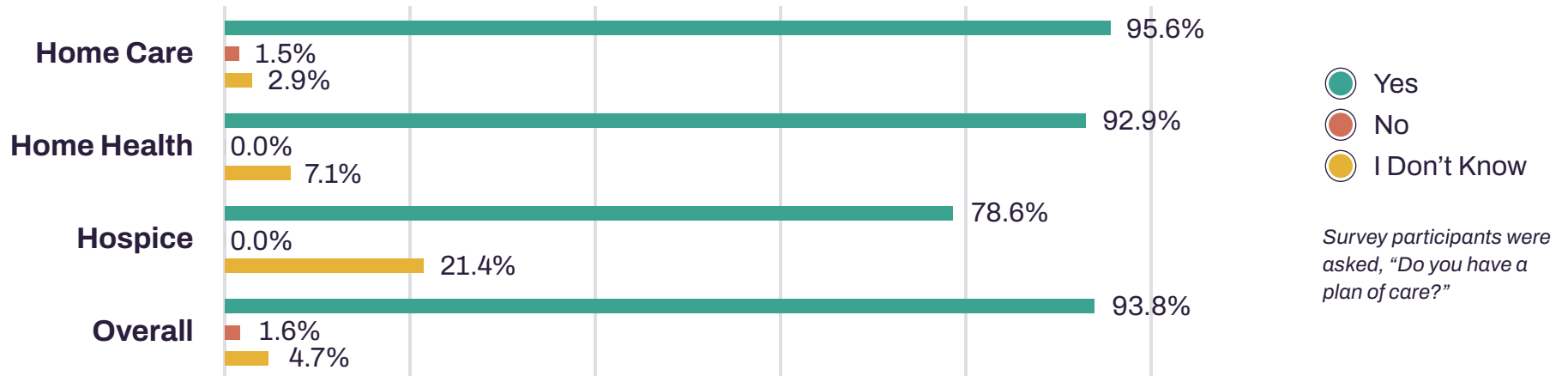
- Pacific
- Central
- Great Lakes
- Southern
- Northeast

This graph represents the percentages of providers who reported offering each type of care in 2023. Because providers were given the option to list multiple service offerings, these percentages may not add up to 100%.



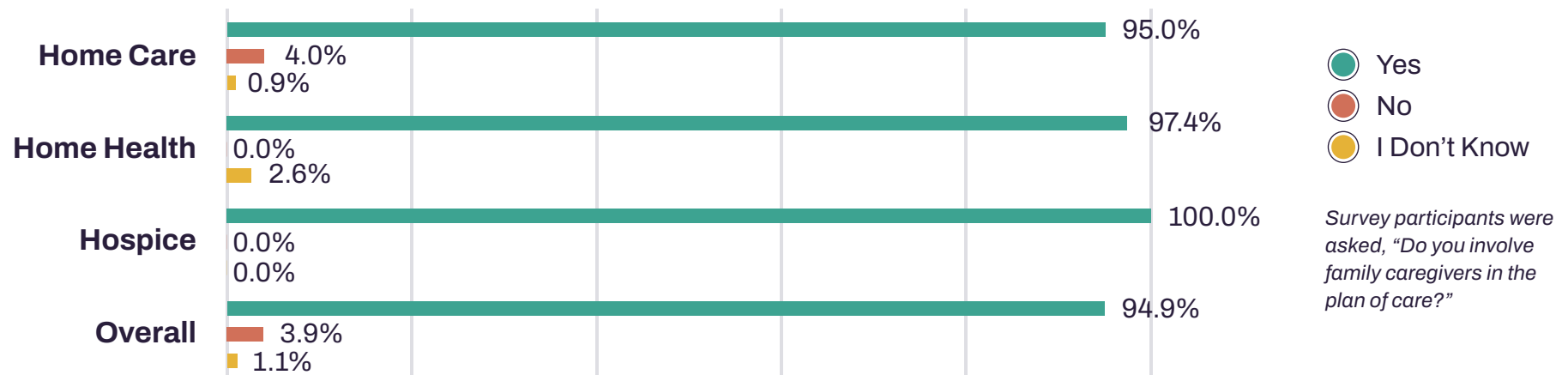
CARE PLANS

5.4 Overall Percent of Providers Having a Plan of Care - Line of Business



CARE PLANS

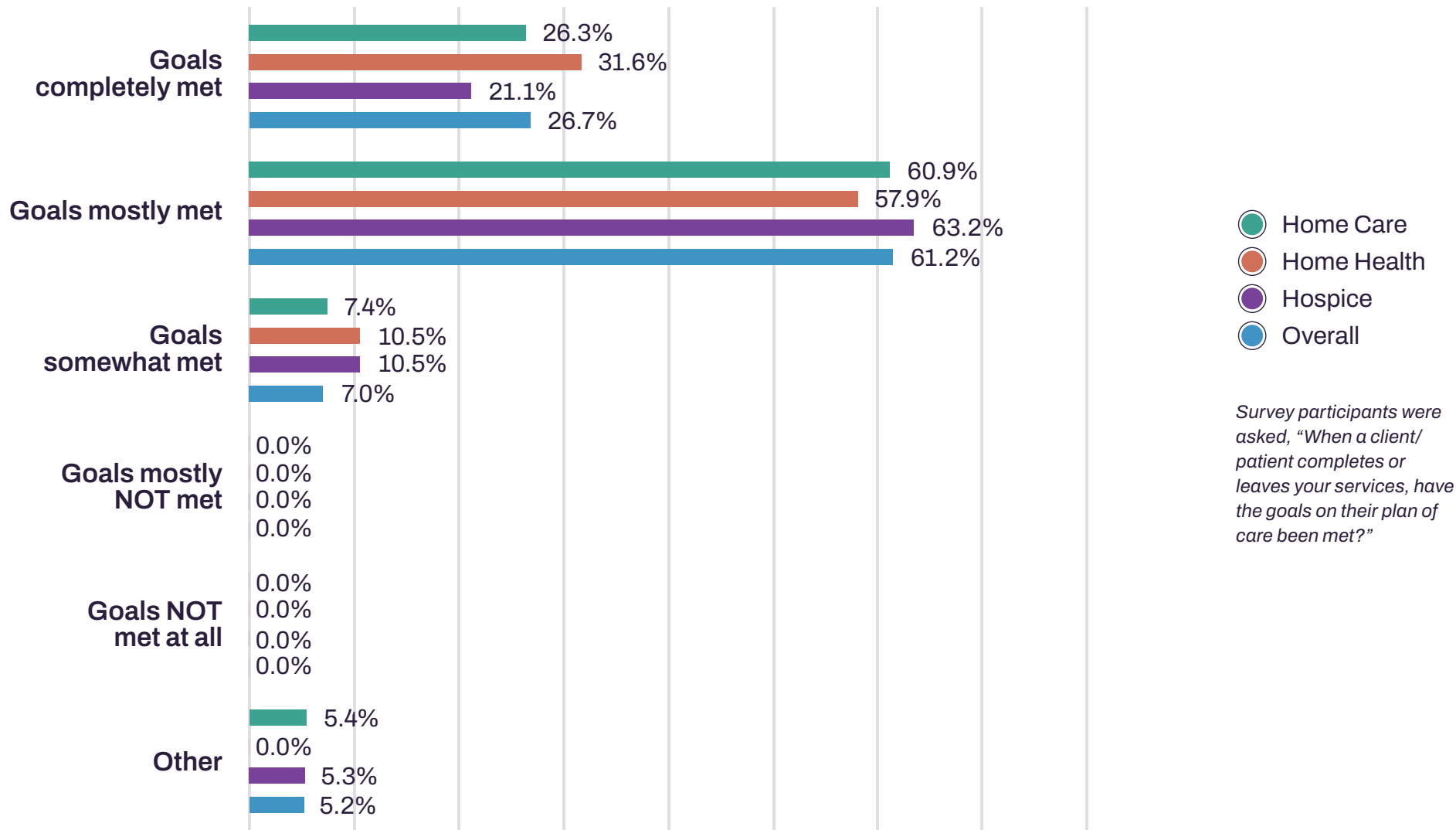
5.5 Overall Percent of Providers Having a Plan of Care - Family Involvement - Line of Business





CARE PLANS

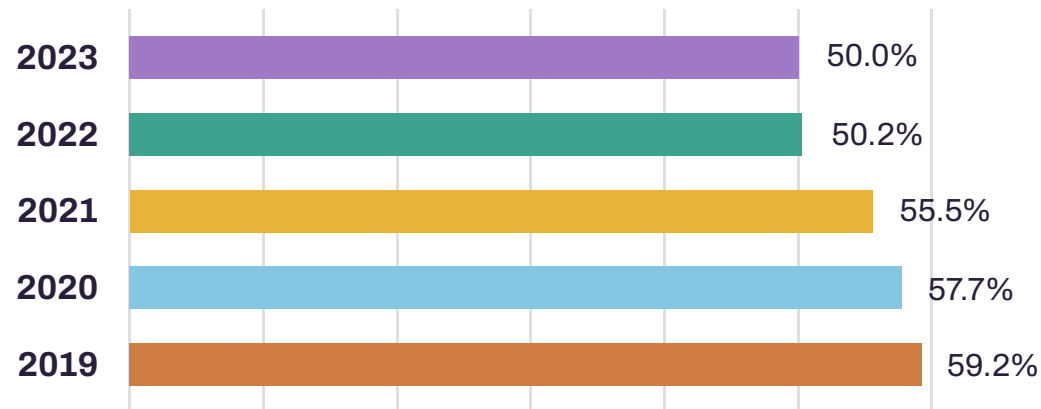
5.6 Overall Percent of Providers Having a Plan of Care - Goals Met - Line of Business





CUSTOMER TURNOVER RATES

5.7 Home Care Historical Median Customer Turnover Rate



Customer Turnover Calculation

A provider has to be in business for one full calendar year to be included in the turnover calculations. Basic customer turnover is calculated by taking the **number of customers who stopped services** in 2023 and dividing it by the **average number of customers serviced** in 2023.

$$\frac{\text{\# of Customers Stopped Services}}{\text{Avg. \# of Customers Serviced*}} = \text{Customer Turnover Rate}$$

*To calculate your average number of customers serviced during a year, take the sum of the number of customers serviced at the end of one year (e.g. Dec. 2022) and at the end of the next year (e.g. Dec. 2023) and divide that number by 2.

$\# \text{ of customers serviced (Dec. 2022)} + \# \text{ of customers serviced (Dec. 2023)} \div 2 = \text{Avg. \# of Customers Serviced}$

CUSTOMER TURNOVER RATES

5.8 Overall Median Customer Turnover Rate - Line of Business

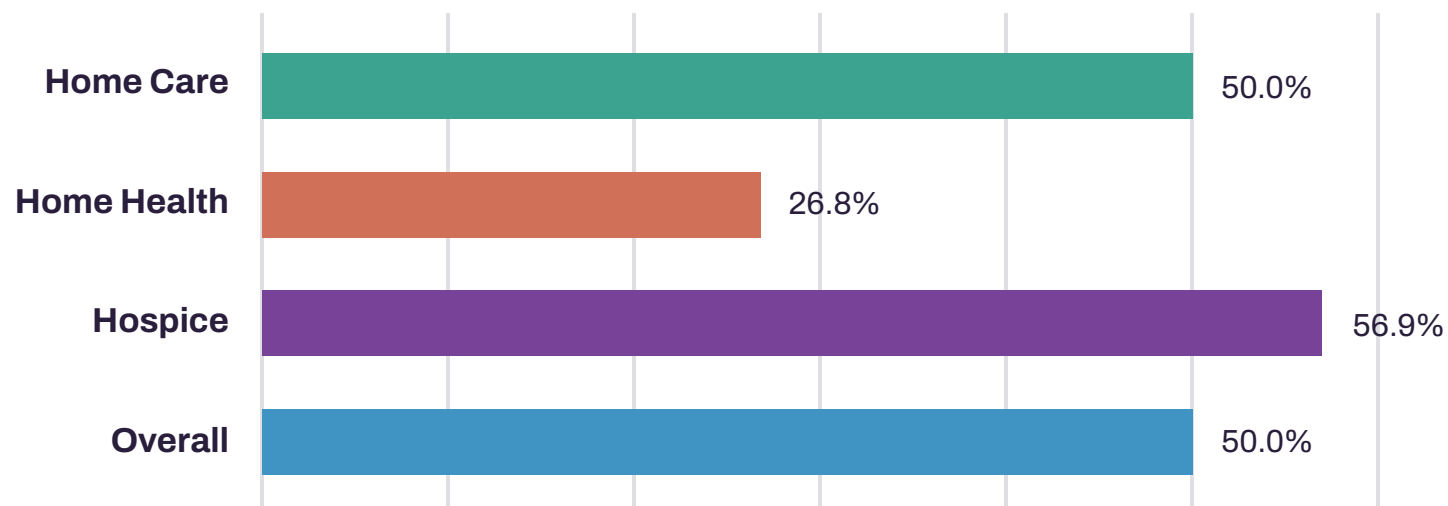


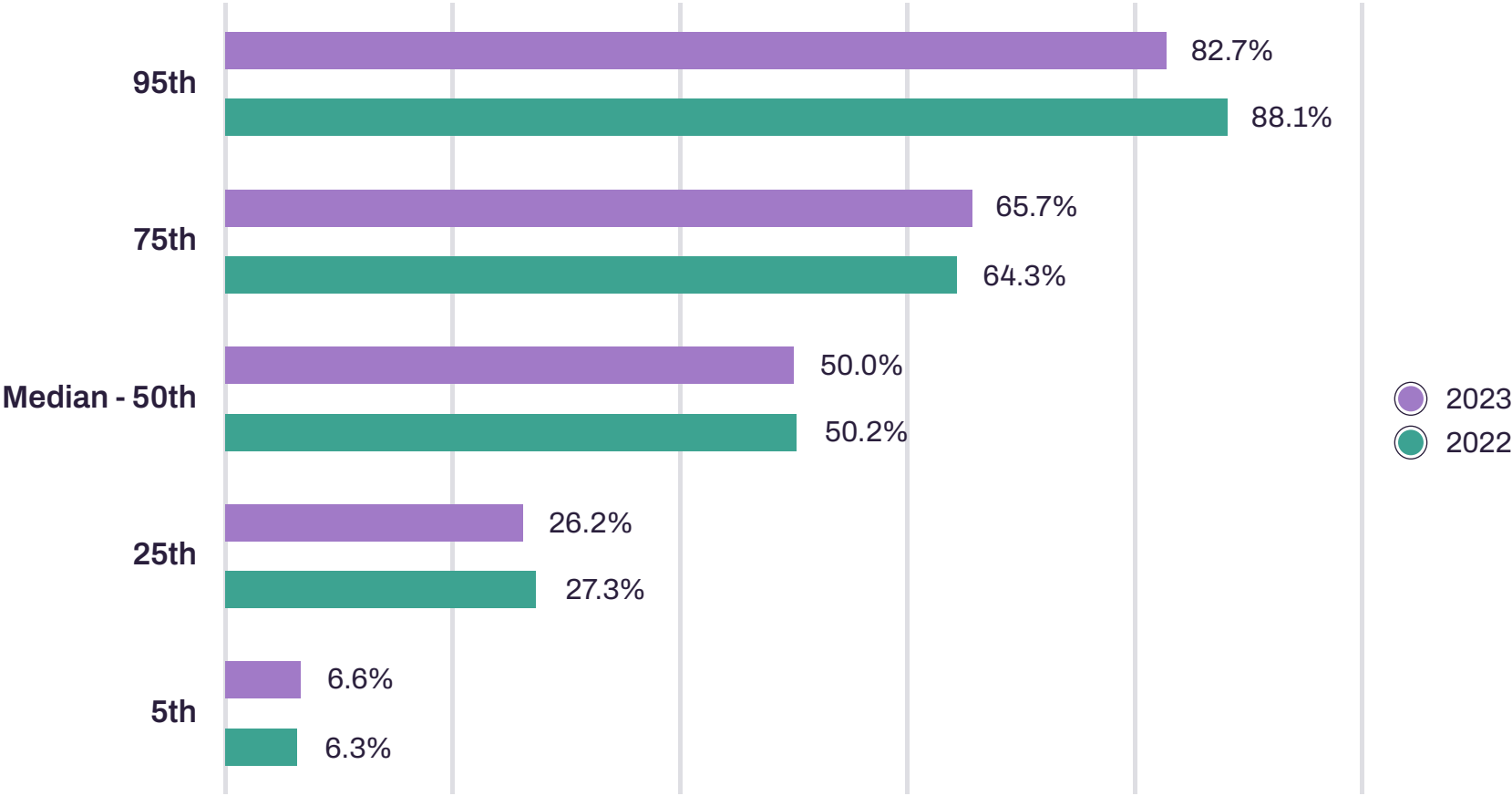
Figure 5.8 refers to customers who voluntarily chose services elsewhere.

Median data on points marked "Overall" include the entire participation sample regardless of lines of business. For this reason, an Overall Median would be different than the median of the median numbers for each line of business.



CUSTOMER TURNOVER RATES

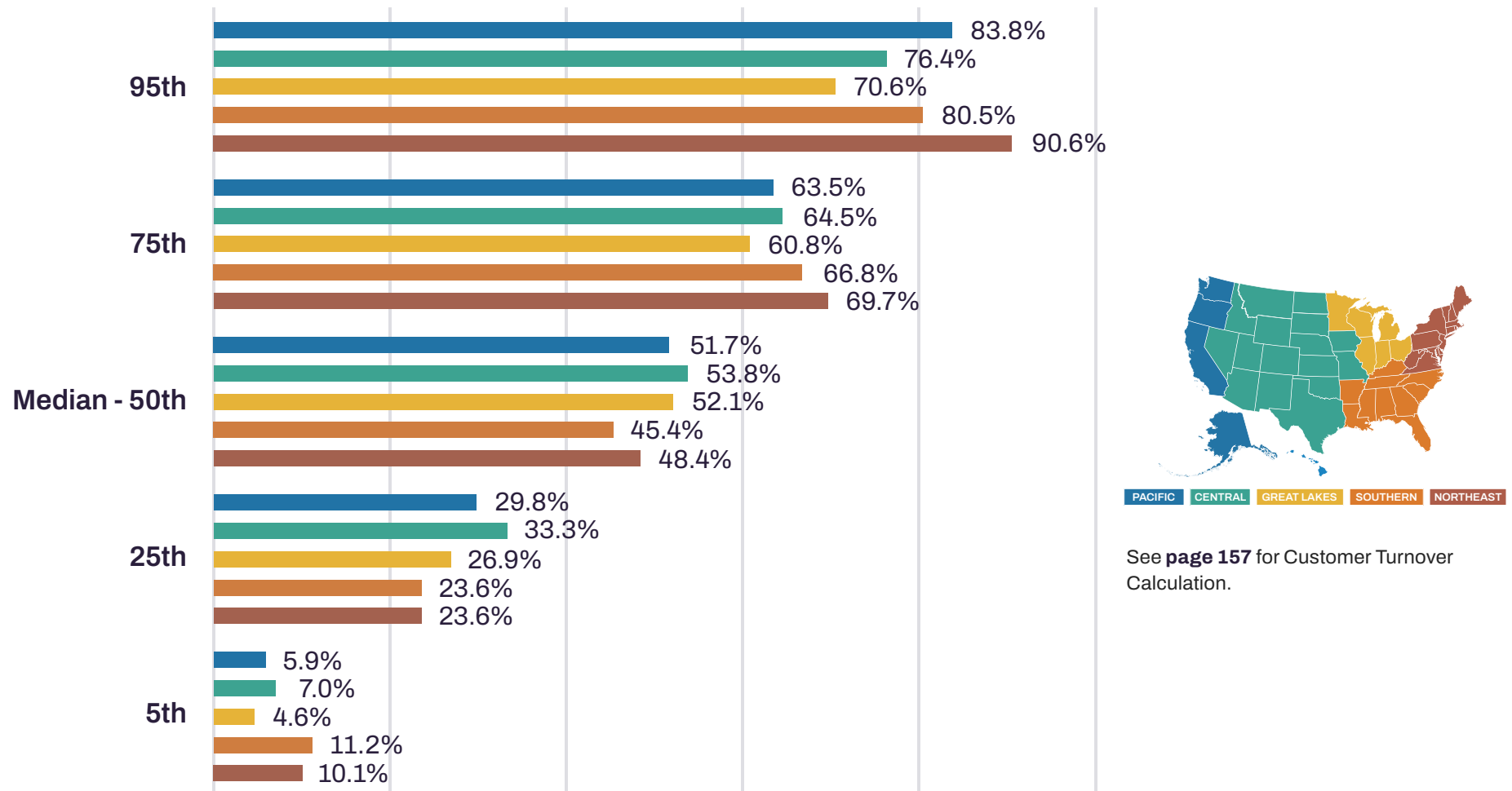
5.9 Overall Historical Customer Turnover Rate - Percentile Ranking





CUSTOMER TURNOVER RATES

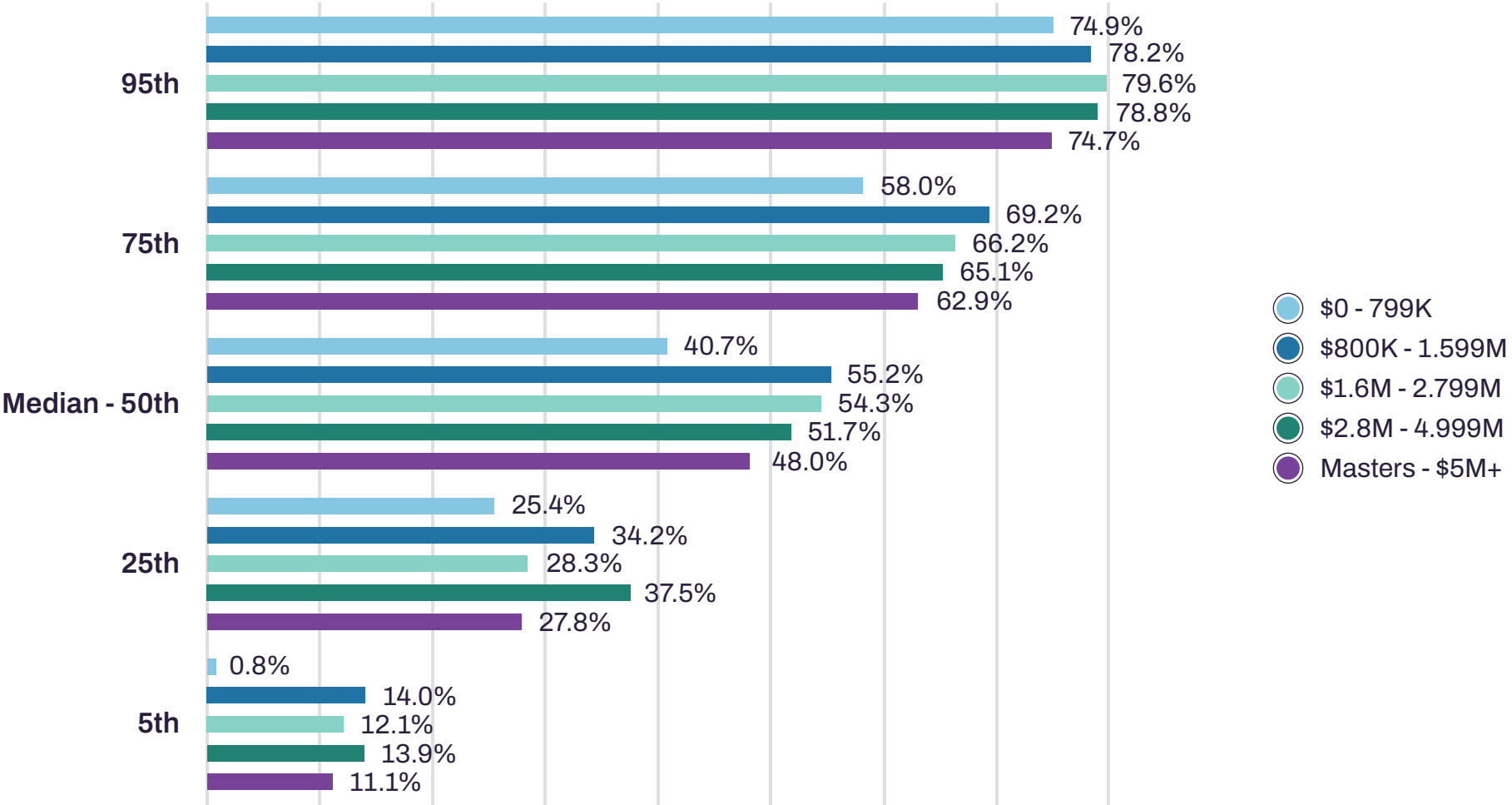
5.10 Overall Customer Turnover Rate for 2023 - Geographic Region by Percentile Rankings





CUSTOMER TURNOVER RATES

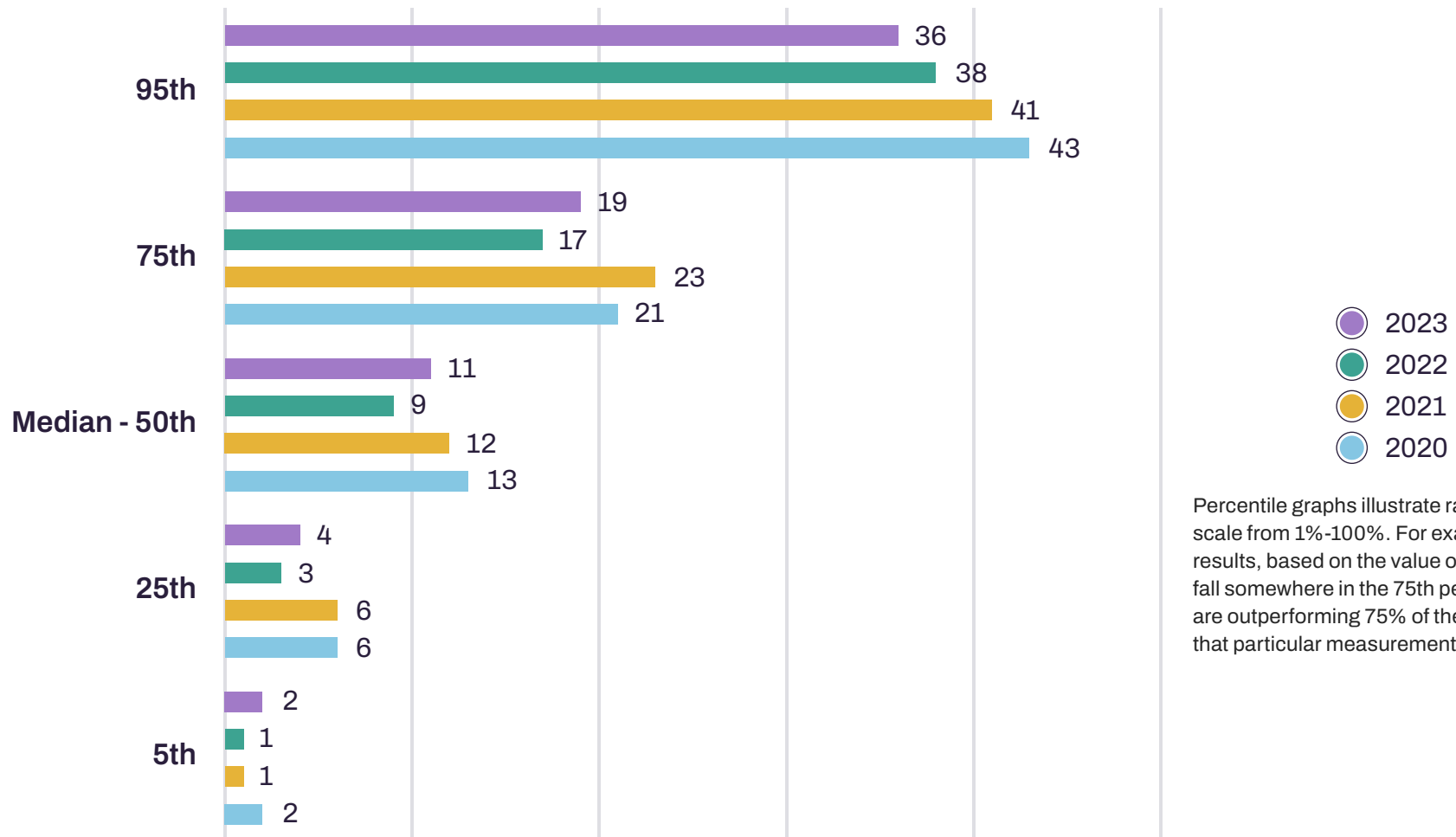
5.11 Home Care Customer Turnover Rate for 2023 - Revenue Ranges by Percentile Rankings





CUSTOMER AVERAGE LENGTH OF SERVICE

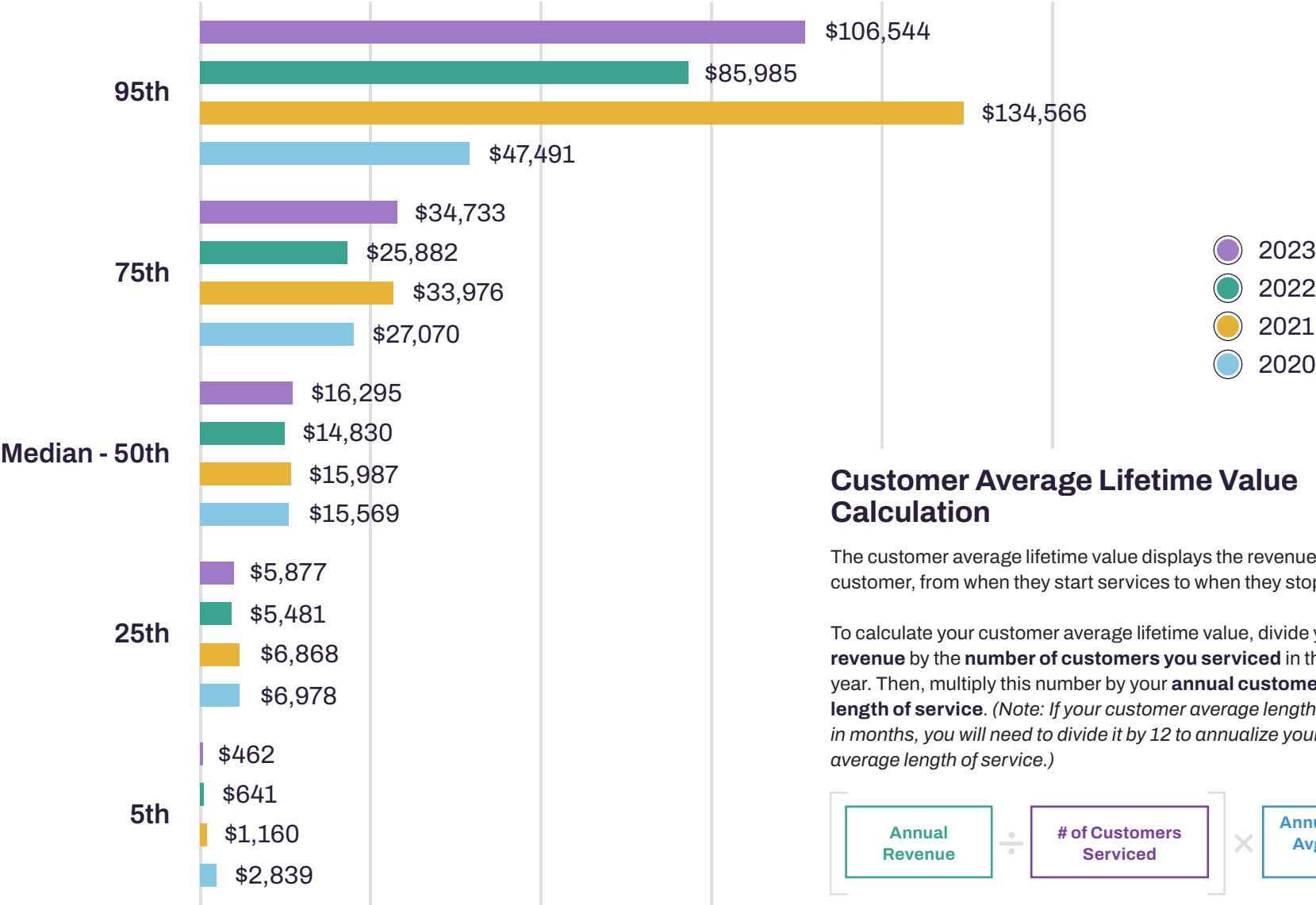
5.12 **Home Care** Historical Customer Average Length of Service (In Months) - Percentile Ranking





CUSTOMER AVERAGE LIFETIME VALUE

5.13 Home Care Historical Customer Average Lifetime Value - Percentile Ranking



Customer Average Lifetime Value Calculation

The customer average lifetime value displays the revenue generated per customer, from when they start services to when they stop services.

To calculate your customer average lifetime value, divide your **annual revenue** by the **number of customers you serviced** in the same year. Then, multiply this number by your **annual customer average length of service**. (Note: If your customer average length of service is in months, you will need to divide it by 12 to annualize your customer average length of service.)

Annual Revenue

÷

of Customers Serviced

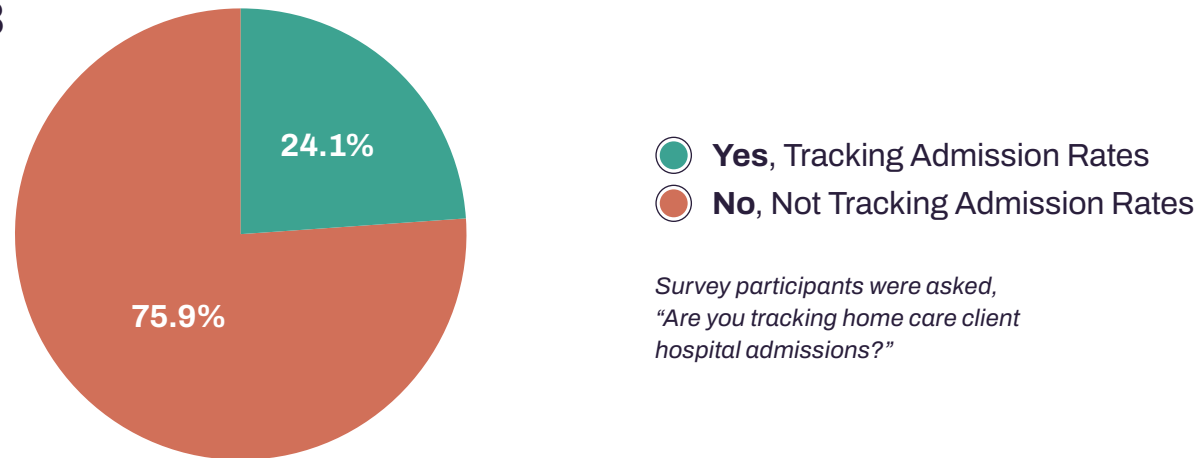
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Annual Customer Avg. Length of Service



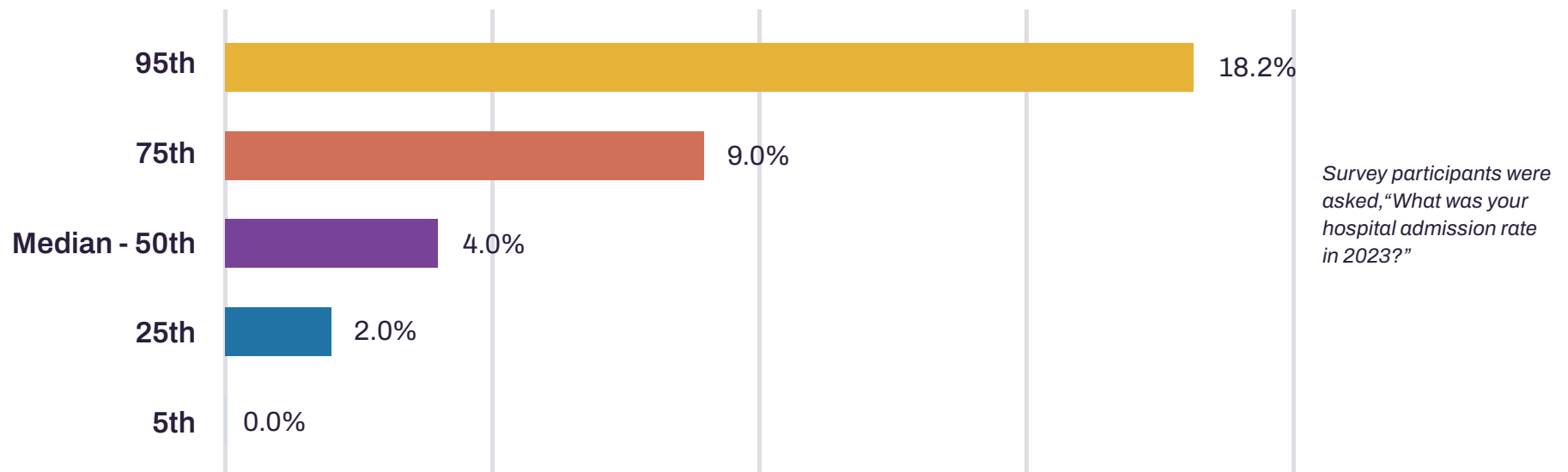
ADMISSION RATES

5.14 Home Care Percentage of Providers Tracking Hospital Admission Rates for 2023



ADMISSION RATES

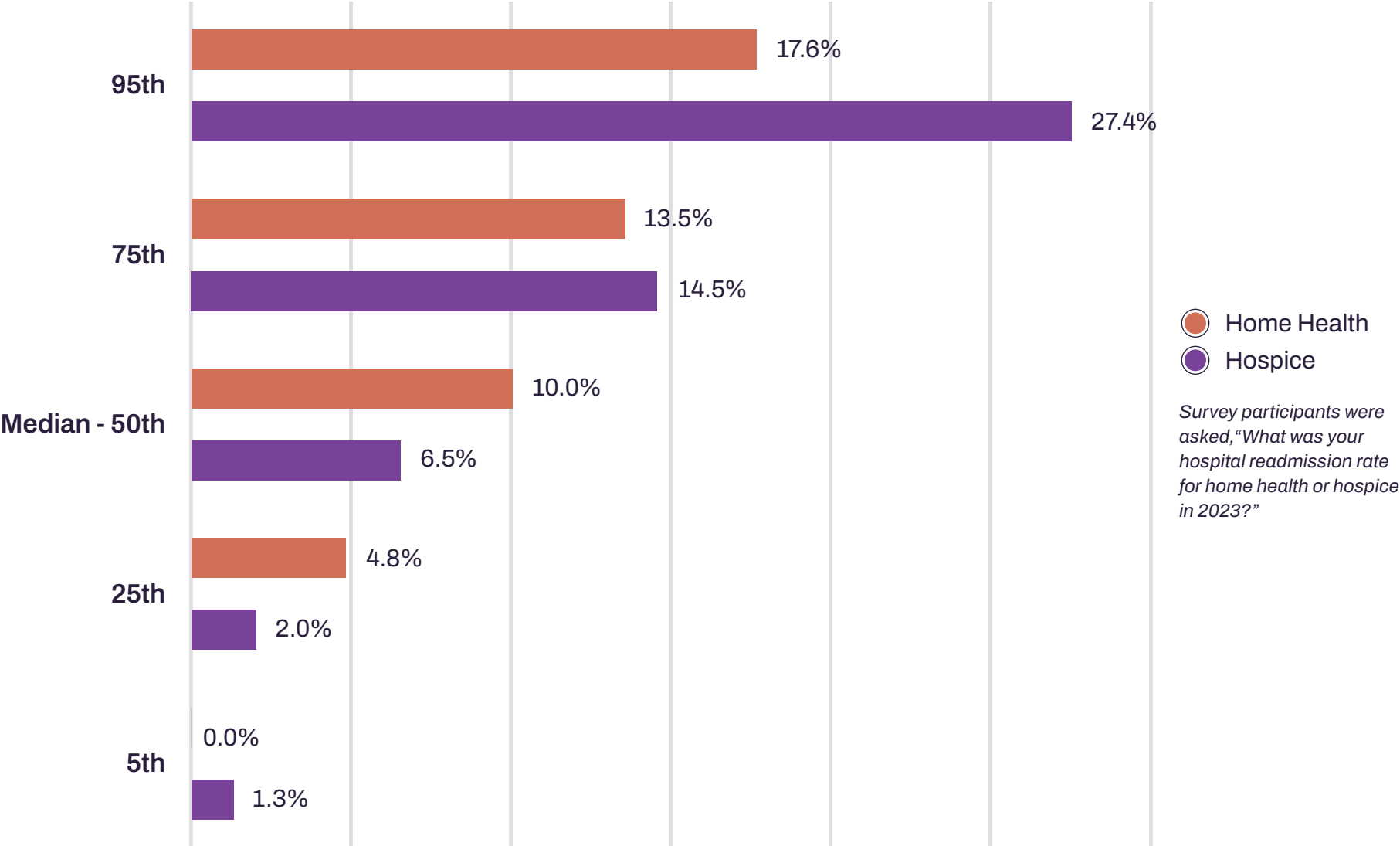
5.15 Home Care Hospital Admission Rate for 2023 - Percentile Ranking





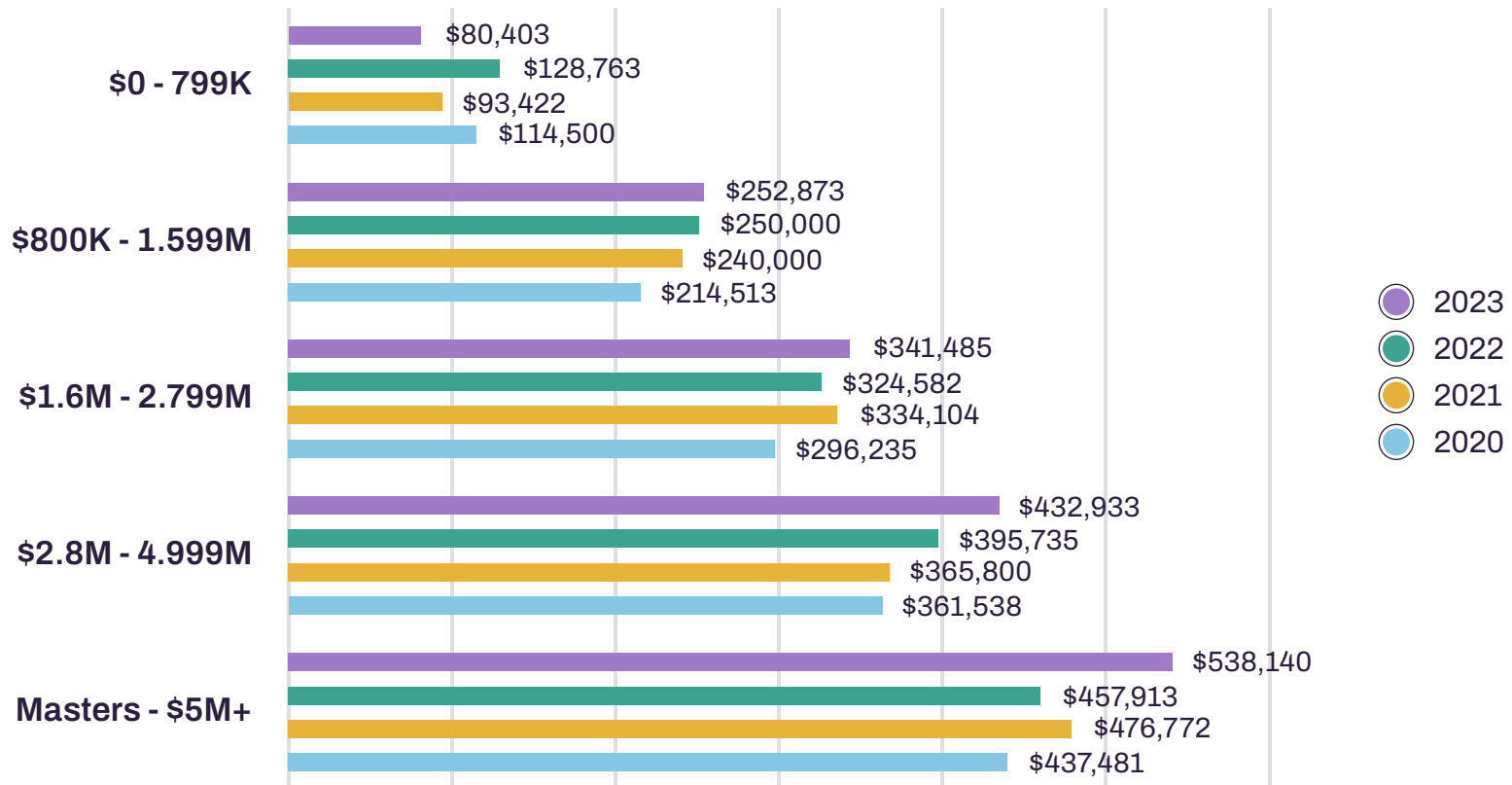
READMISSION RATES

5.16 **Home Health** **Hospice** Hospital Readmission Rate for 2023 - Percentile Ranking - Line of Business





SALES PER OFFICE STAFF EMPLOYEE

5.17 **Home Care** Historical Sales per Office Staff Employee - Revenue Ranges

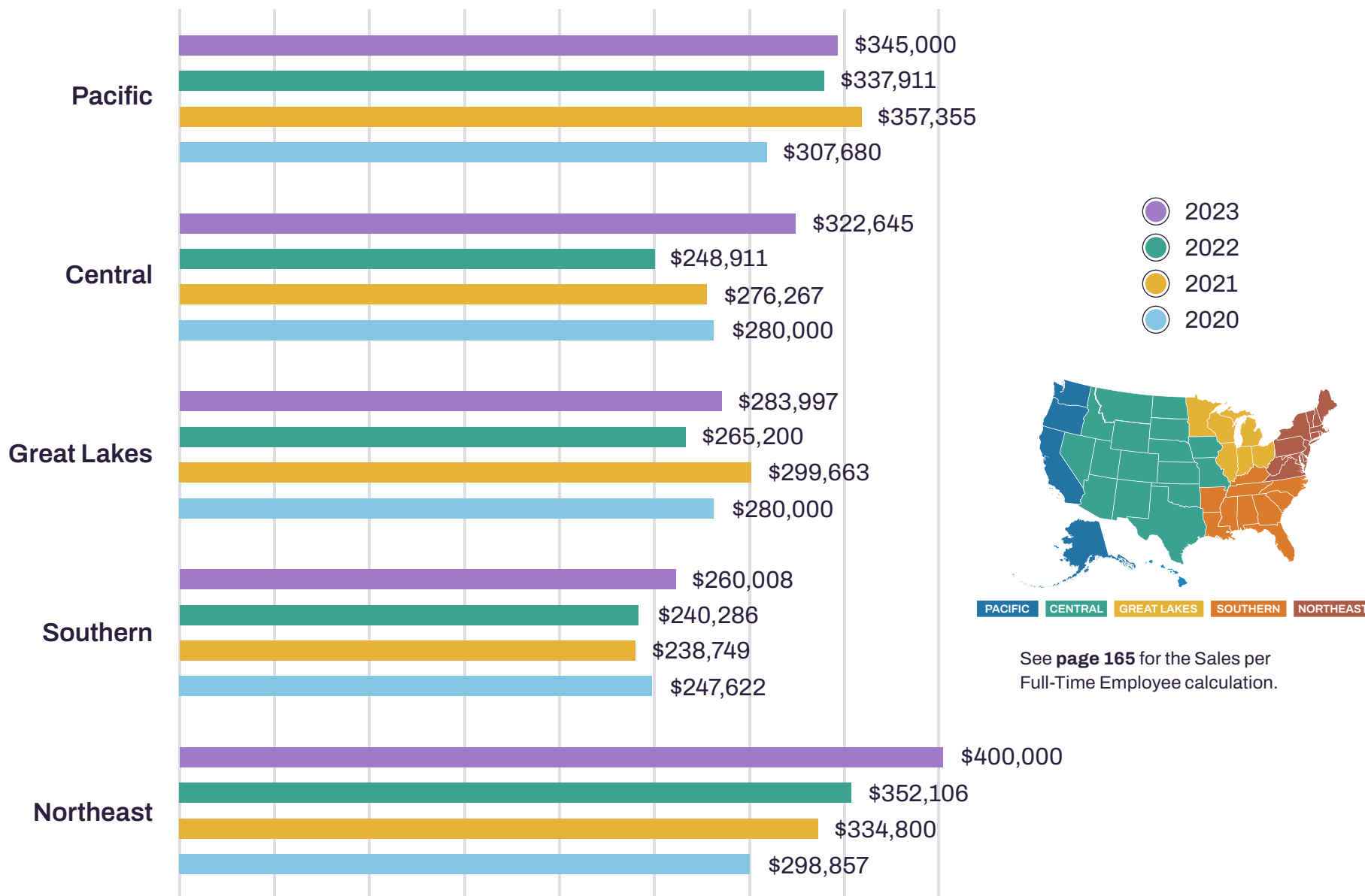
Sales per Office Staff Employee

This benchmark emphasizes getting the most out of each employee. Leaders tend to have higher Sales per Office Staff Employee as they learn to run more efficiently on less overhead. However, if sales per office staff employee is too high, your business may be sacrificing quality to save money. This figure represents a benchmark to compare your company against. Sales per Office Staff Employee is calculated by dividing your **annual revenue** (or 12-month trailing revenue) by **the number of office staff** you employ, excluding caregivers, but including active owners. Part-time employees count as .5 or 1/2.

$$\boxed{\text{Annual Revenue}} \div \boxed{\text{\# of Office Staff}} = \boxed{\text{Sales per Office Staff Employee}}$$



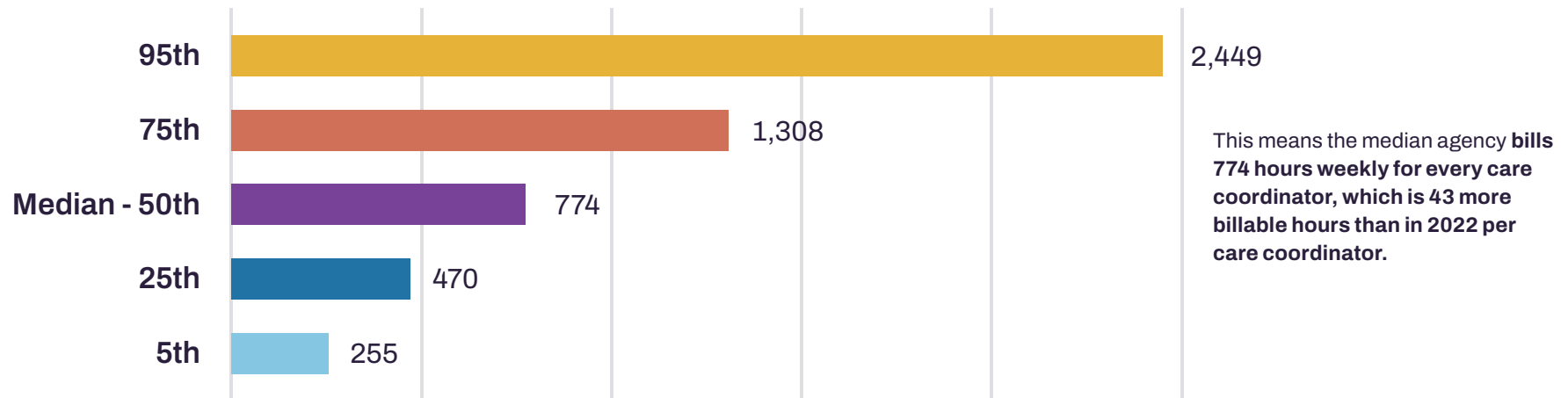
SALES PER OFFICE STAFF EMPLOYEE

5.18 **Home Care** Historical Sales per Office Staff Employee - Geographic Region



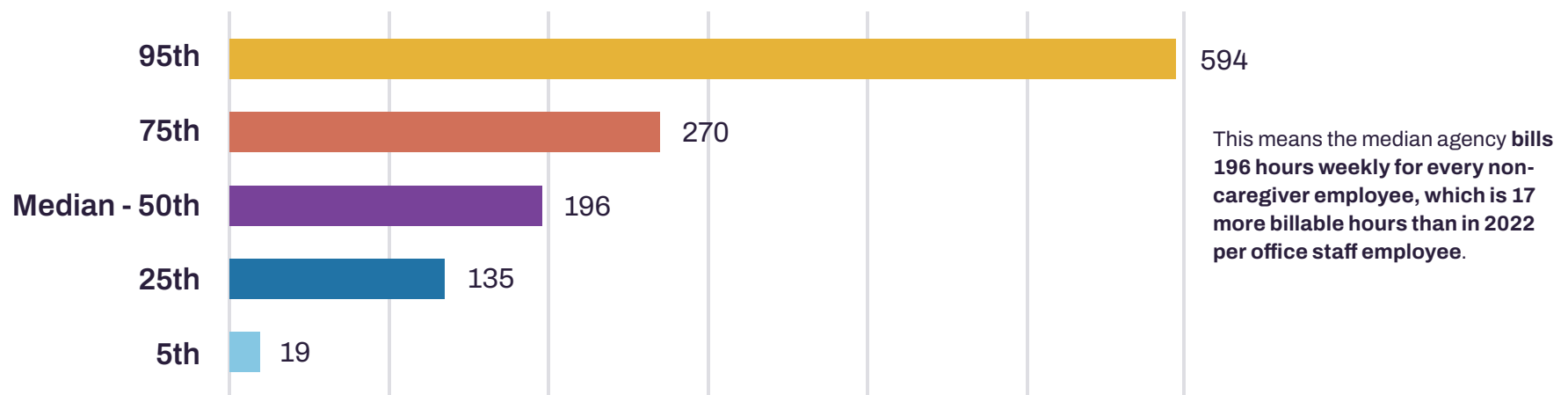
WEEKLY BILLABLE HOURS

5.19 Home Care Weekly Billable Hours per Care Coordinator for 2023



WEEKLY BILLABLE HOURS

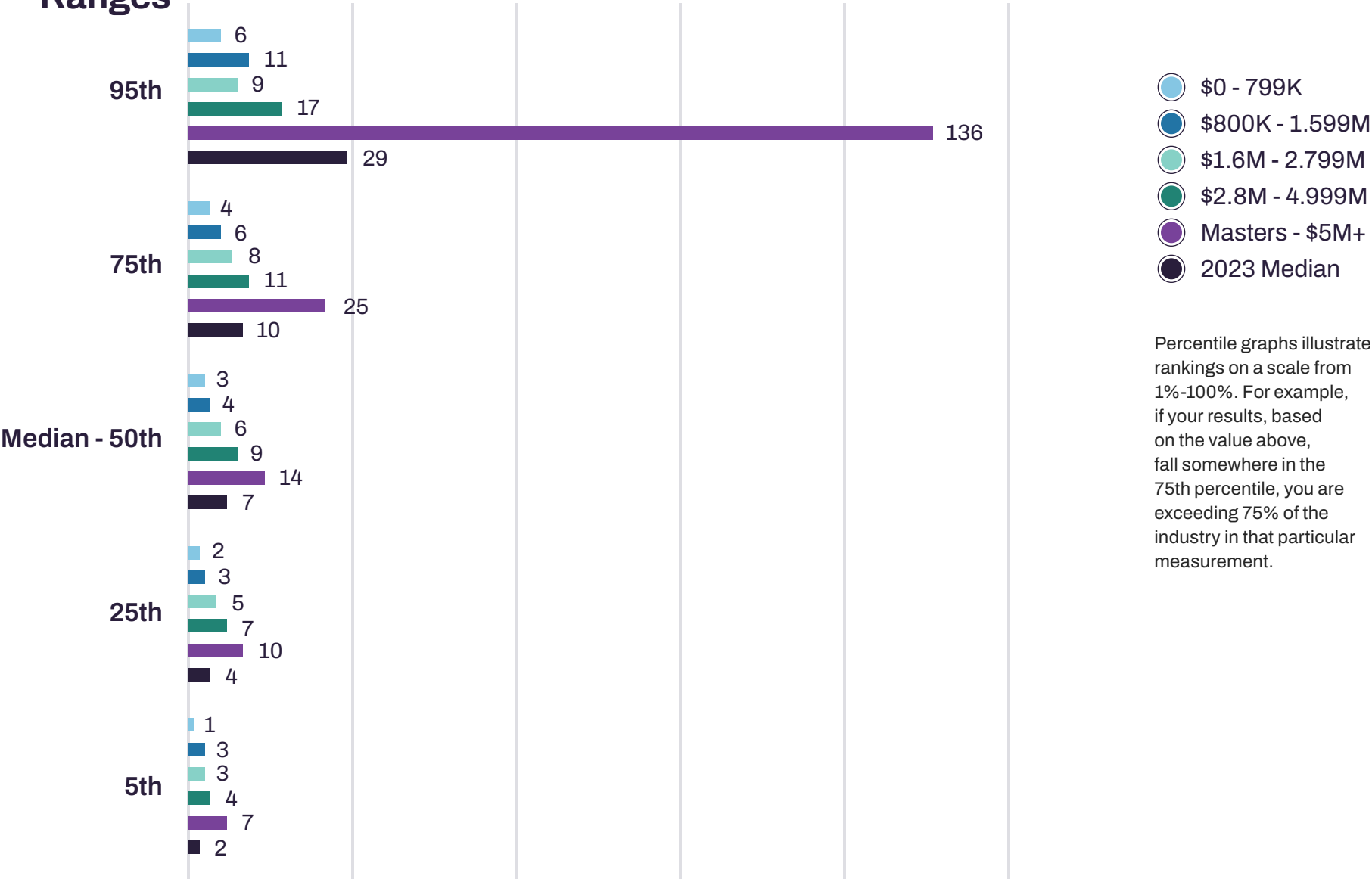
5.20 Home Care Weekly Billable Hours per Office Staff Employee for 2023





STAFFING SUMMARY

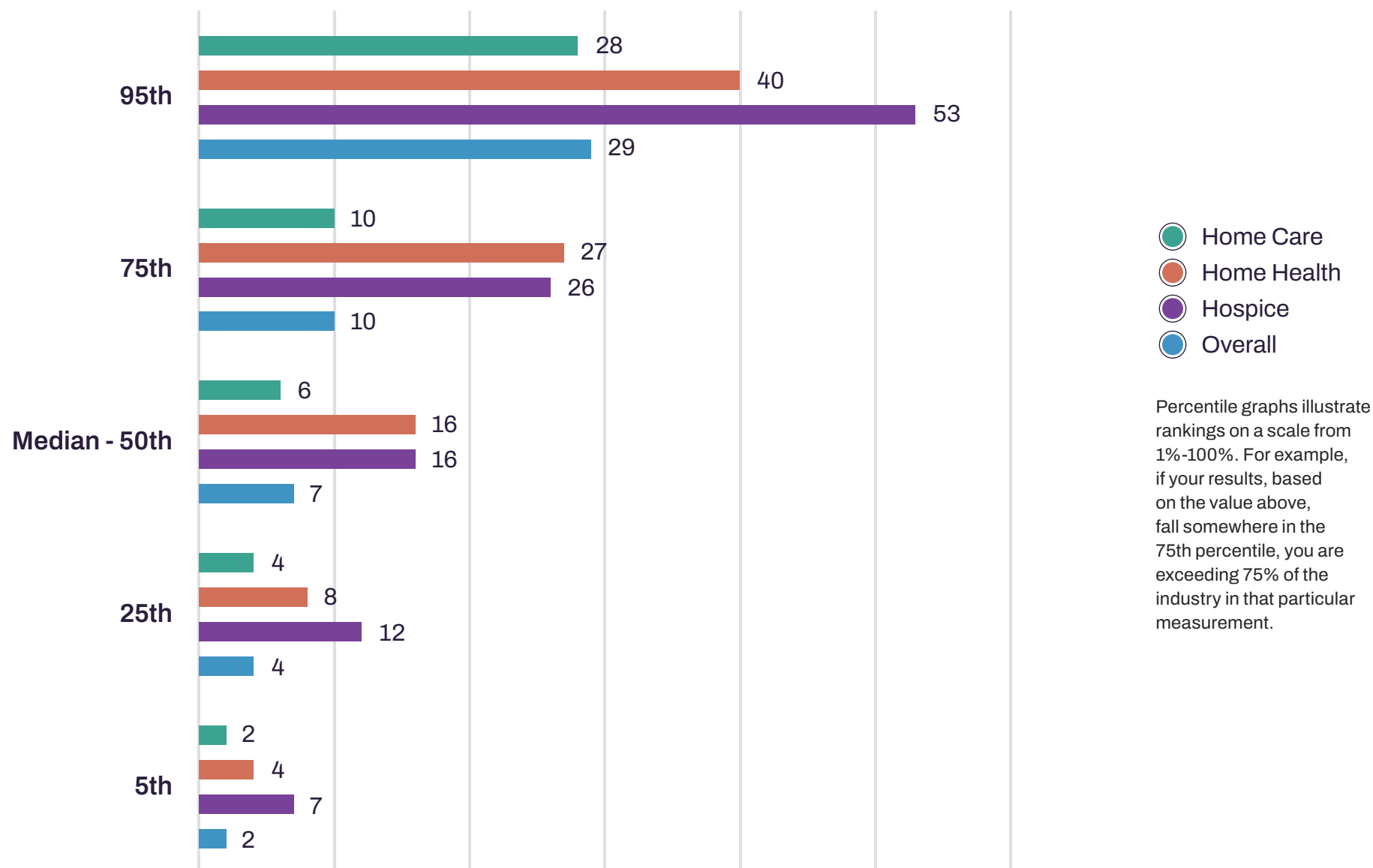
5.21 **Home Care** Median Number of Office Staff Employed for 2023 - Revenue Ranges





STAFFING SUMMARY

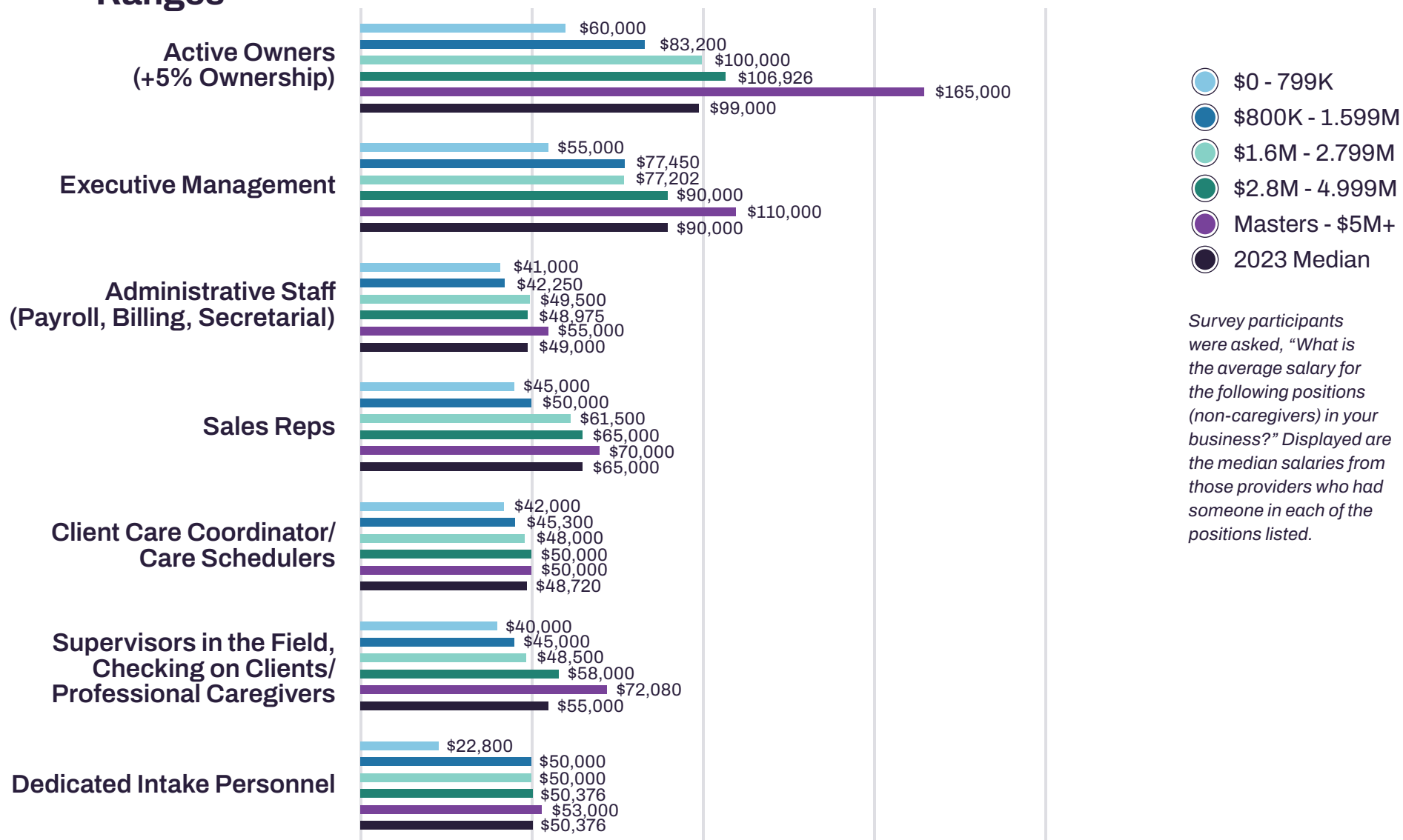
5.22 Overall Median Number of Office Staff Employed for 2023 - Line of Business





STAFFING SUMMARY

5.23 Home Care Median Office Staff Annual Salaries for 2023 - Overall & Revenue Ranges





STAFFING SUMMARY

5.24 Overall Median Office Staff Annual Salaries for 2023 - Line of Business

Position	Home Care	Home Health	Hospice	Overall
Active Owners (+5% Ownership)	\$98,000	\$140,000	\$237,500	\$99,000
Executive Management	\$85,000	\$100,000	\$95,000	\$90,000
Administrative Staff (Payroll, Billing, Secretarial)	\$49,000	\$50,000	\$60,000	\$49,000
Sales Reps	\$65,000	\$65,000	\$77,500	\$65,000
Customer Care Coordinator/Care Schedulers	\$48,700	\$45,000	\$45,500	\$48,720
Supervisors in the Field, Checking on Clients/Professional Caregivers	\$52,000	\$80,500	\$87,500	\$55,000
Dedicated Intake Personnel	\$50,000	\$51,000	\$61,500	\$50,376

Survey participants were asked, "What is the average annual salary for the following office staff positions (non-care professionals) in your business?"

STAFFING SUMMARY

5.25 Home Care Median Staffing Summary for 2023 - Overall & Revenue Ranges

Position	\$0 - 799K	\$800K - 1.599M	\$1.6M - 2.799M	\$2.8M - 4.999M	Masters - \$5M+	2023 Median
Active Owners (+5% Ownership)	1	1	1	1	1	1
Executive Management	1	1	1	1	2	1
Administrative Staff (Payroll, Billing, Secretarial)	1	1	1	2	3	2
Sales Reps	1	1	1	1	1.2	1
Customer Care Coordinator/Care Schedulers	1	1	1	2	4	2
Supervisors in the Field, Checking on Clients/Professional Caregivers	1	1	1	1.8	3	1
Dedicated Intake Personnel	1	1	1	1	1	1

Survey participants were asked, "How many office staff members (non-care professionals) occupied each of the following positions in your business as of December 31, 2023?"



STAFFING SUMMARY

5.26 **Overall** Median Staffing Summary for 2023 - Line of Business

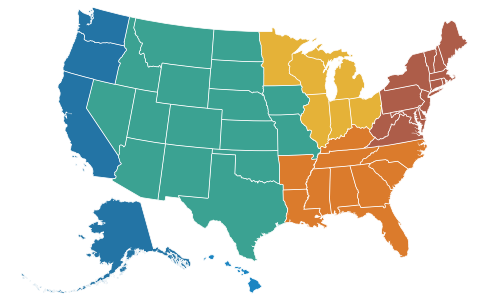
Position	Home Care	Home Health	Hospice	Overall
Active Owners (+5% Ownership)	1	2	2	1
Executive Management	1	3	3	1
Administrative Staff (Payroll, Billing, Secretarial)	1.5	3	3.5	2
Sales Reps	1	1	2.5	1
Customer Care Coordinator/Care Schedulers	2	2	2	2
Supervisors in the Field, Checking on Clients/Professional Caregivers	1	2	3	1
Dedicated Intake Personnel	1	1	3	1

Survey participants were asked, "How many office staff members (non-care professionals) occupied each of the following positions in your business as of December 31, 2023?"

STAFFING SUMMARY

5.27 **Overall** Median Staffing Summary for 2023 - Geographic Regions

Position	Pacific	Central	Great Lakes	Southern	Northeast
Active Owners (+5% Ownership)	1	1	1	1	1
Executive Management	1	1	1	1	1
Administrative Staff (Payroll, Billing, Secretarial)	2	1.5	1.5	1	2
Sales Reps	1	1	1	1	1
Customer Care Coordinator/Care Schedulers	2	2	1.5	1.8	2
Supervisors in the Field, Checking on Clients/Professional Caregivers	2	1	1.5	1	2
Dedicated Intake Personnel	1	1	1	1	1

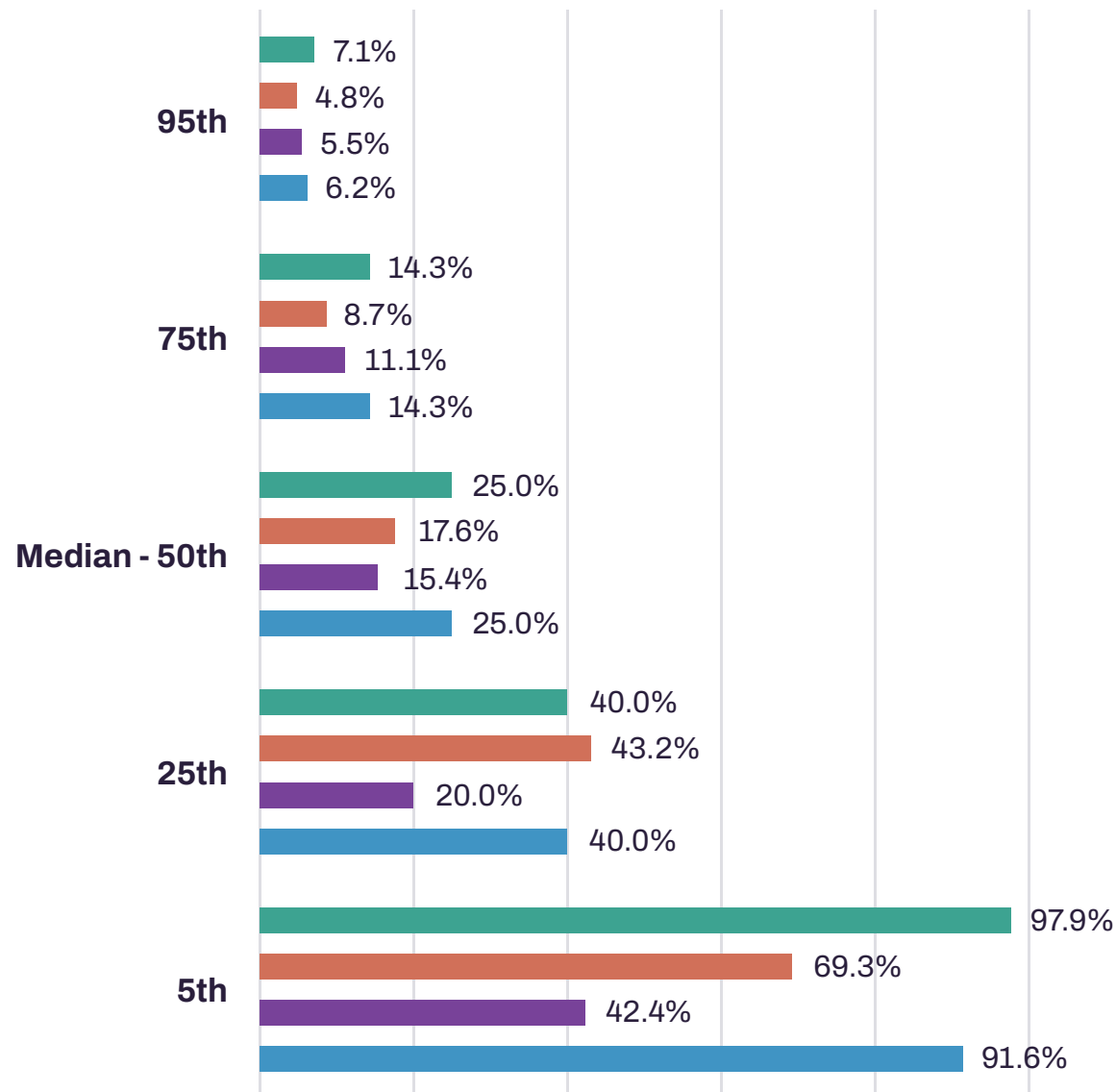


Survey participants were asked, "How many office staff members (non-care professionals) occupied each of the following positions in your business as of December 31, 2023?"



OFFICE STAFF TURNOVER

5.28 Overall Office Staff Turnover for 2023 - Line of Business



- Home Care
- Home Health
- Hospice
- Overall

Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

Office Staff Turnover Calculation

Office Staff Turnover represents the percent of office staff who quit or were terminated in 2023. Providers had to have been in business for at least one full year. Basic office staff turnover is calculated by taking the **number of office staff who quit or were terminated** in the year and dividing that number by the **average number of office staff employed** in the same time period.

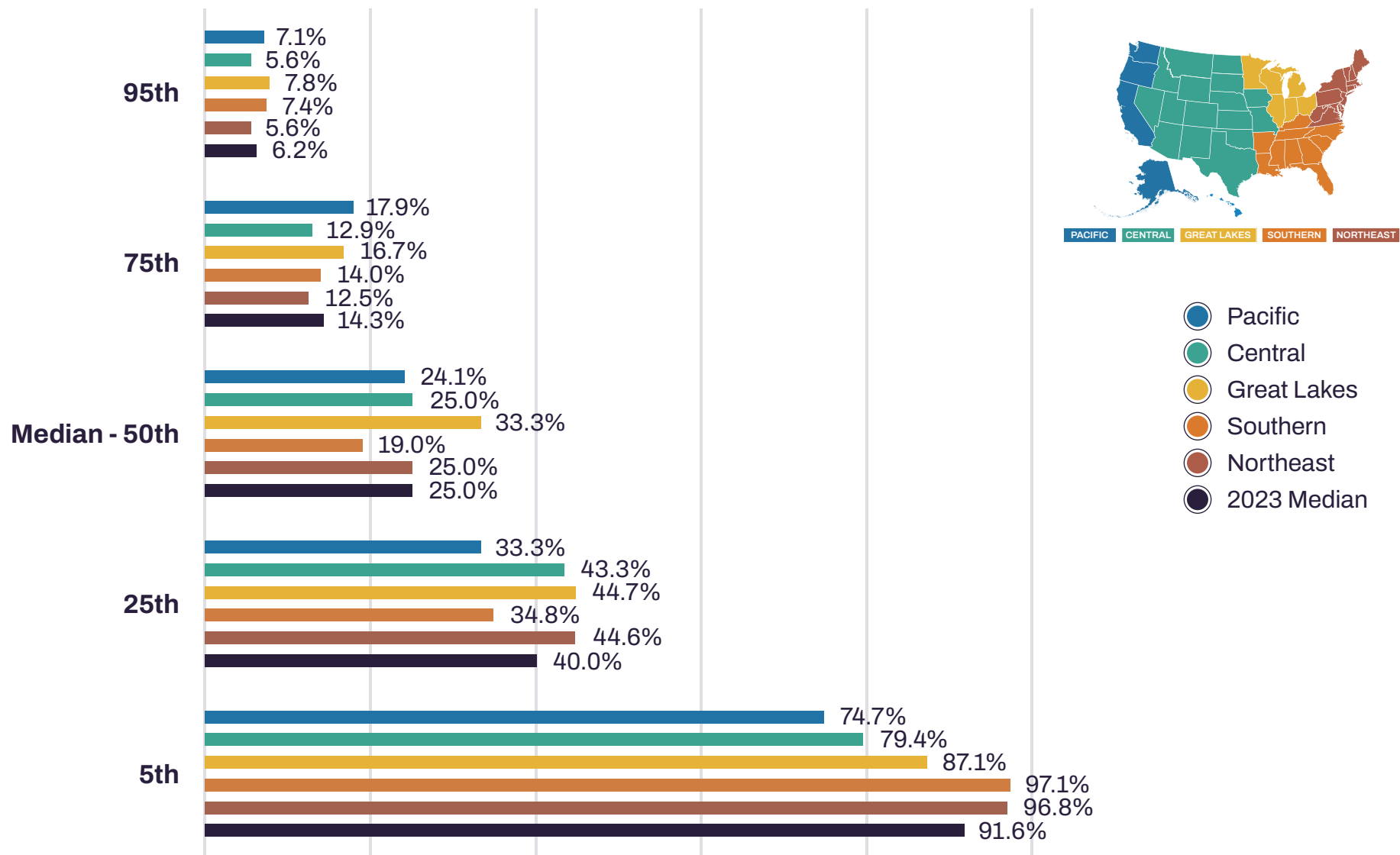
$$\frac{\text{\# of Office Staff Quit/Terminated}}{\text{Avg. \# of Office Staff Employed*}} = \text{Office Staff Turnover Rate}$$

**To calculate your average number of office staff employed during a year, take the sum of the number of staff employed at the end of one year (e.g. Dec. 2022) and at the end of the next year (e.g. Dec. 2023) and divide that number by 2.*

$\frac{\text{\# of office staff employed (Dec. 2022)} + \text{\# of office staff employed (Dec. 2023)}}{2} = \text{Avg. \# of Office Staff Employed}$

OFFICE STAFF TURNOVER

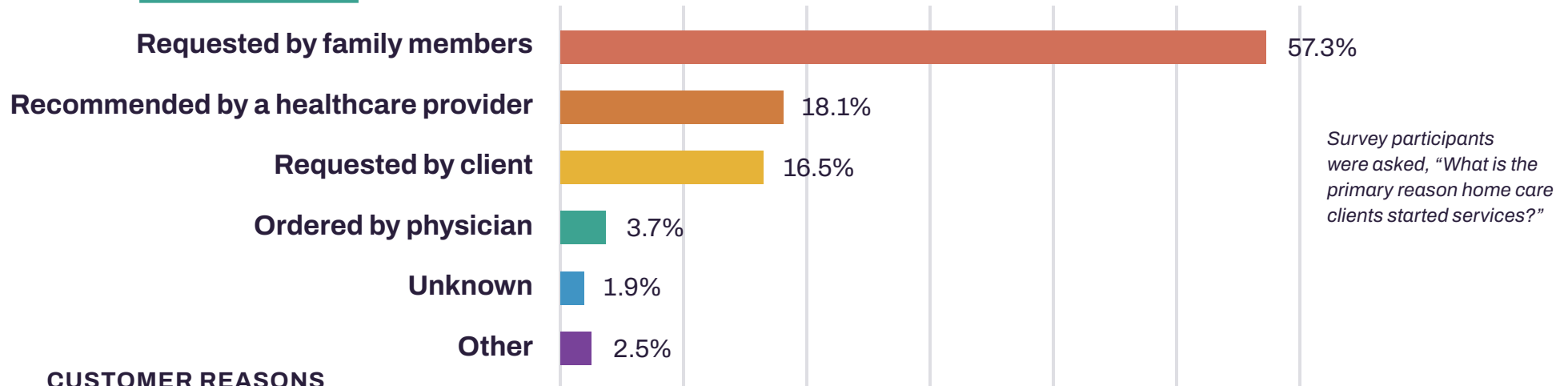
5.29 **Overall** Median Office Staff Turnover - Geographic Regions and Percentile Ranking





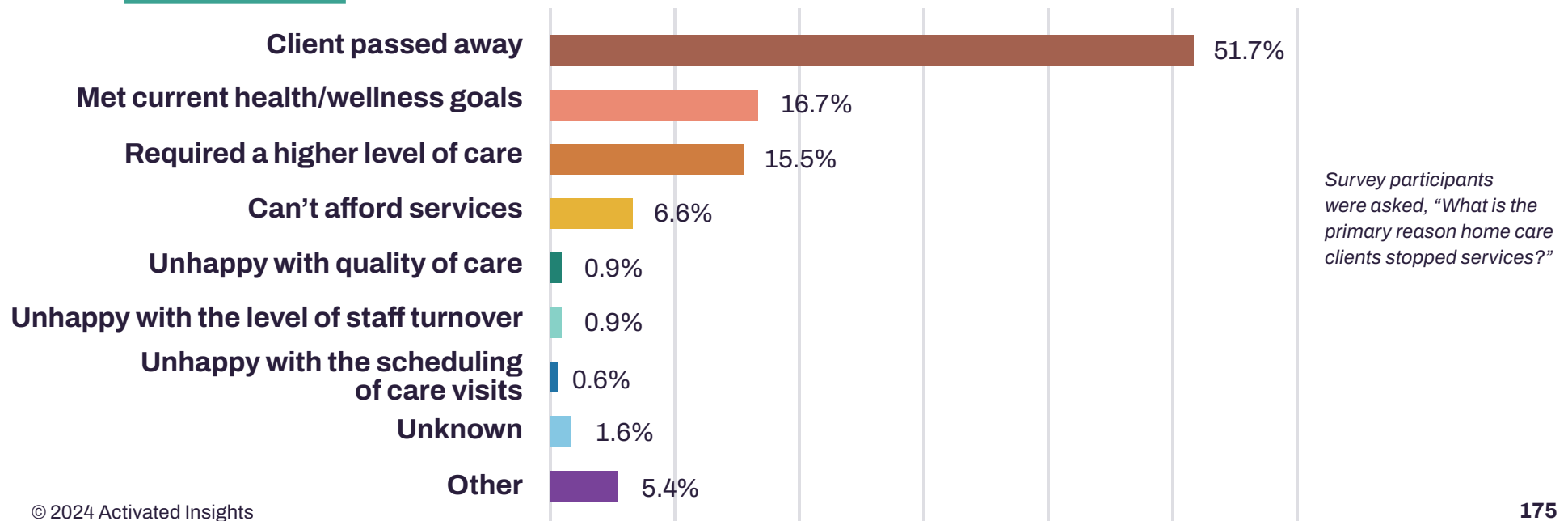
CUSTOMER REASONS

5.30 Home Care Primary Reason for Customers Starting Services



CUSTOMER REASONS

5.31 Home Care Primary Reason for Customers Stopping Services





OFFICE STAFF BENEFITS

5.32 Overall Provided Office Staff Benefits in 2023



OFFICE STAFF BENEFITS

5.33 Overall Office Staff Benefits Provided in 2023 - Line of Business

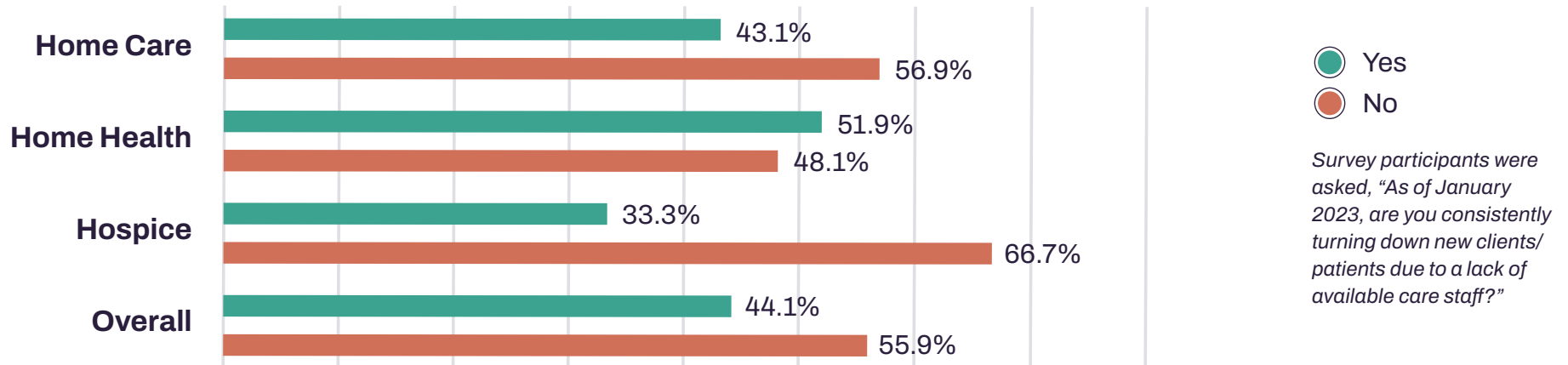
Benefits	Home Care	Home Health	Hospice	Overall
PTO	85.8%	86.8%	96.0%	86.3%
Major Health	59.1%	86.8%	88.0%	63.2%
Dental	57.3%	76.3%	88.0%	60.3%
Sick Leave	55.5%	57.9%	56.0%	56.2%
401K Matching	46.0%	71.1%	72.0%	48.6%
Travel Reimbursement	49.3%	55.3%	44.0%	48.6%
Supplement (e.g., Aflac)	44.9%	44.7%	52.0%	44.1%
Daily/Weekly Pay	42.7%	28.9%	28.0%	41.3%
Education Reimbursement	21.5%	39.5%	40.0%	23.5%
Profit Sharing	13.1%	18.4%	12.0%	14.0%
FSA or Cafeteria Plan	9.1%	28.9%	44.0%	12.1%
DCAP (Dependent Care Assistance Plan)	4.0%	21.1%	8.0%	5.4%
Childcare or Daycare Service for Caregivers	3.3%	10.5%	4.0%	4.1%
Other	8.4%	13.2%	12.0%	8.6%

Survey participants were asked, “What types of benefits do you offer to the following full-time employee types? [Office Staff (including Administrative RNs, supervisors, etc.)]”



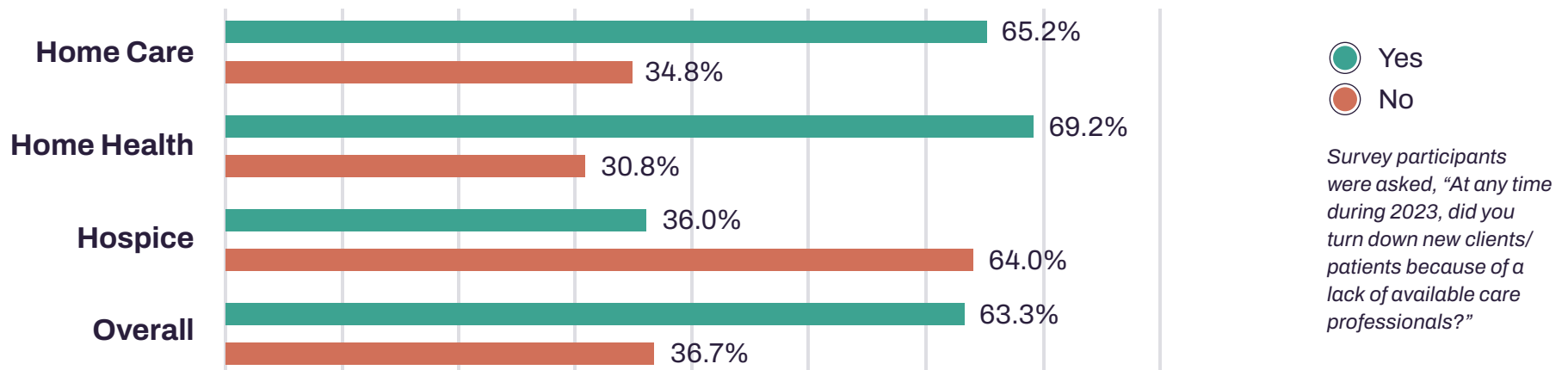
TURNING DOWN CUSTOMERS

5.34 **Overall** Consistently Turning Down New Customers Due to a Lack of Care Professionals - Line of Business



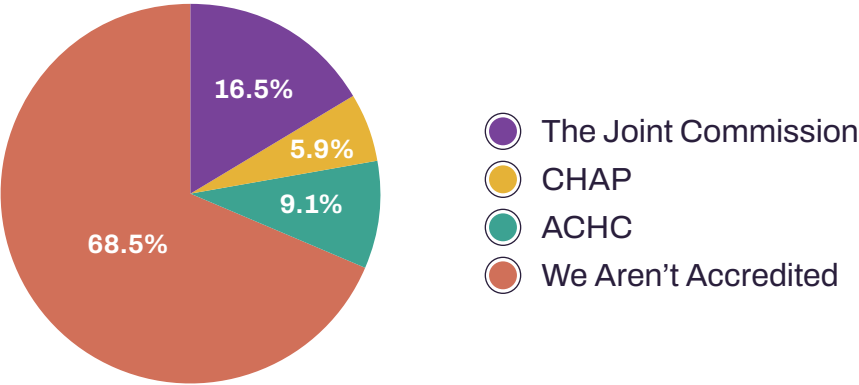
TURNING DOWN CUSTOMERS

5.35 **Overall** Turning Down New Customers at Any Time Due to a Lack of Care Professionals - Line of Business



BUSINESS ACCREDITATIONS

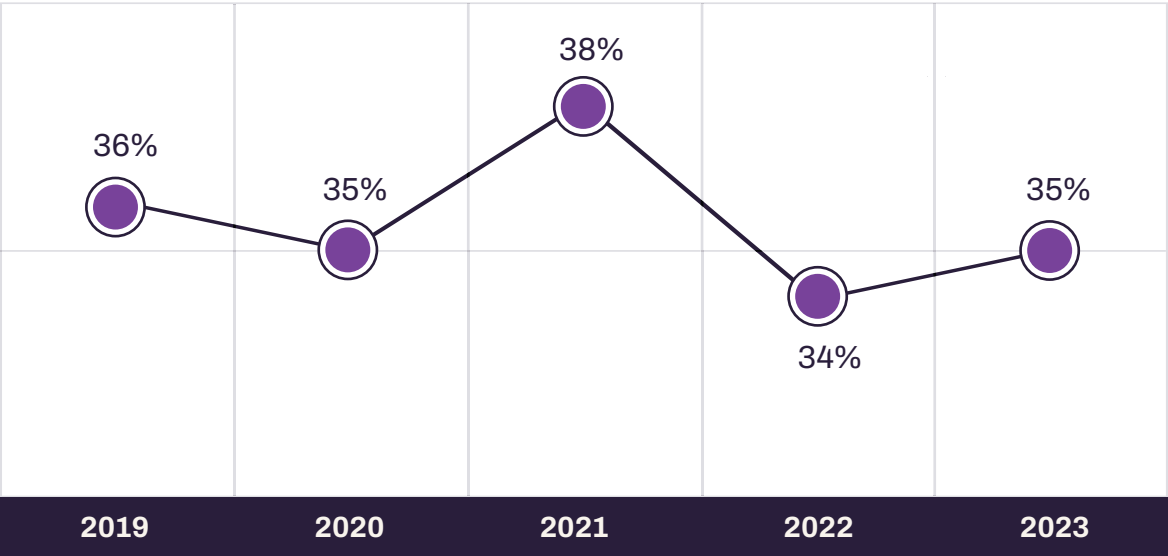
5.36 Overall Business Accreditations for 2023 Report



Survey participants were asked, "Is your business accredited by any of the following?"

LIVE-IN CARE

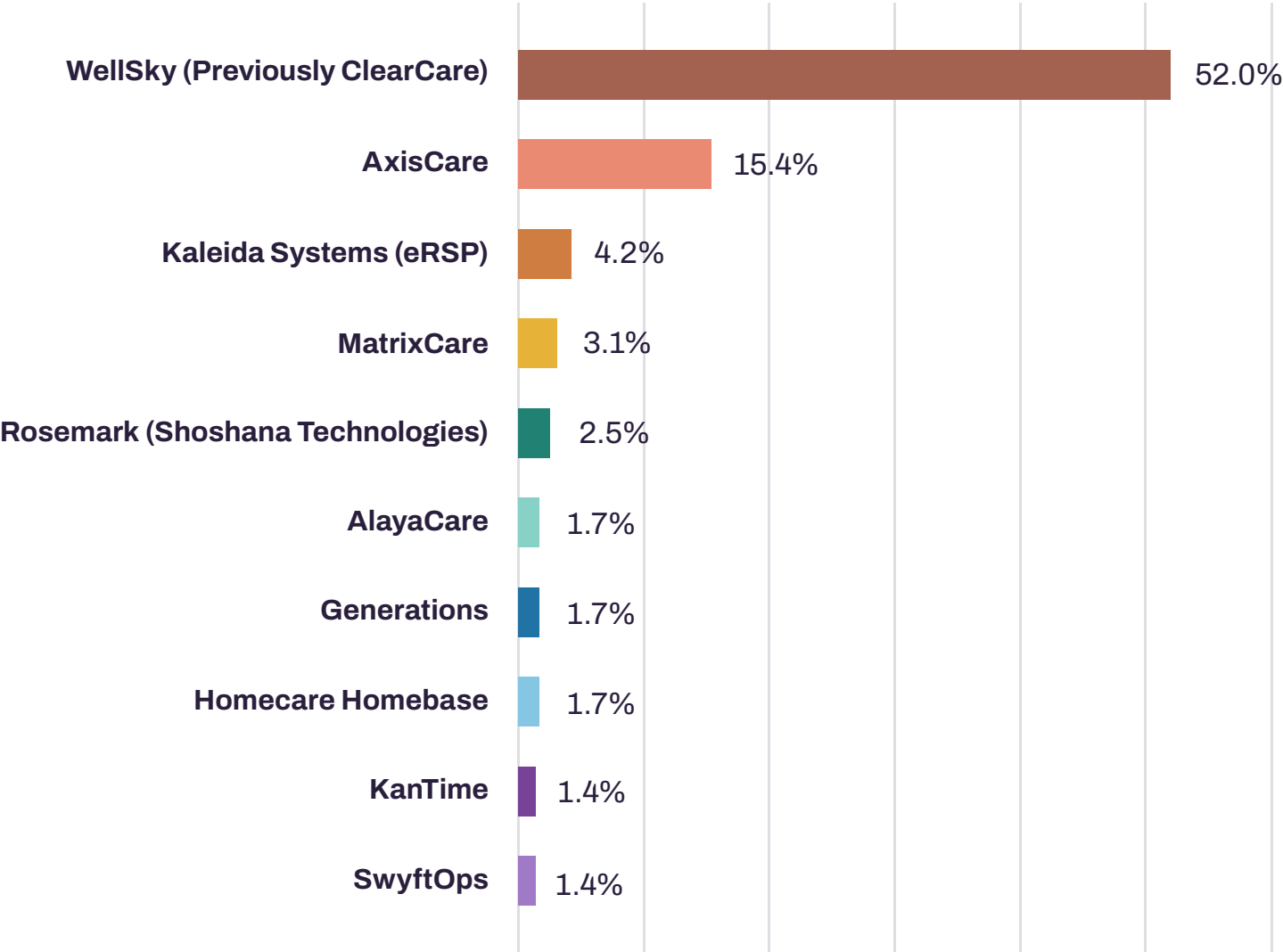
5.37 Home Care Historical Percent of Providers Offering Live-In Care





SCHEDULING SOFTWARES

5.38 Overall Top 10 Scheduling Softwares Used by Providers in 2023



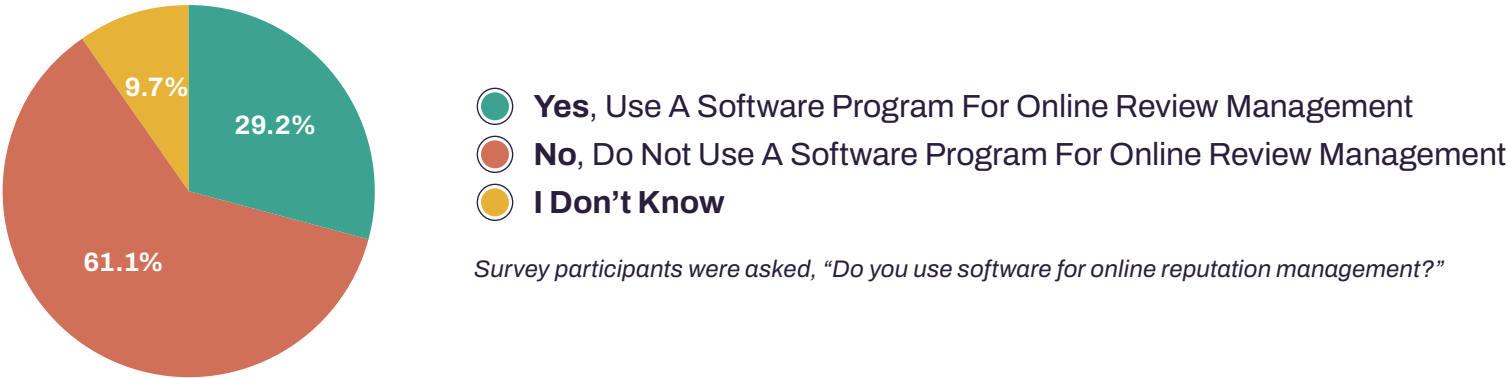
Survey participants were asked, “Which scheduling software do you use?”

OTHER SCHEDULING SOFTWARES:

- Allscripts
- AppointMate
- CareSmartz360
- Epic
- Franchise scheduling software
- MediTech
- NetSmart
- Spectrum Teletrak

REPUTATION MANAGEMENT

5.39 **Overall** Providers Who Use A Software Program for Online Reputation Management



REPUTATION MANAGEMENT

5.40 **Overall** Reputation Management Software Programs Used by Provider in 2023



ARTICLE

Mergers and Acquisitions (M&A) for Post-Acute Care Business Owners



Jennifer J. Ramos

Business Broker
M&A Business Advisors



Mergers and acquisitions have become increasingly common in the post-acute care industry. As the demand for post-acute care services continues to grow, many businesses are exploring opportunities to expand their reach and enhance their service offerings through strategic partnerships.

Why More and More Providers are Considering M&A

One of the main reasons why businesses in this industry consider mergers and acquisitions is to gain a competitive advantage. By joining forces with another company, they can pool their resources, expertise, and client base to create a stronger and more comprehensive service offering. This can result in increased market share and improved profitability.

Additionally, mergers and acquisitions can provide businesses with access to new markets and geographic locations. By acquiring a company that operates in a different region, a post-acute care business can quickly establish a presence in that area and tap into a new customer base. This expansion can lead to increased revenue and business growth.

Furthermore, M&A can also enable providers to diversify their service offerings. For example, a company specializing in personal care services may acquire a company that offers specialized medical care. This allows the merged entity to provide a broader range of services, catering to a wider range of client needs.

However, it is important for businesses to approach this kind of growth strategy with careful planning and consideration. The integration of two companies can be complex and challenging, requiring effective

communication, cultural alignment, and strategic decision-making. It is crucial to conduct thorough due diligence and seek professional advice to ensure a successful and seamless transition.

Steps To Get Started

To position themselves for successful mergers and acquisitions (M&A) opportunities, providers can take the following steps:

1. **Define Strategic Objectives:** Clearly define the business's strategic objectives and identify how M&A aligns with those goals. Determine the specific reasons for pursuing M&A, such as expanding into new markets, diversifying service offerings, or gaining a competitive advantage.
2. **Conduct Market Research:** Conduct thorough market research to identify potential M&A targets that align with the strategic objectives. Assess the target company's financial health, market position, client base, and service offerings to ensure compatibility and synergy.

3. **Evaluate Cultural Fit:** Assess the cultural fit between the post-acute care business and the potential M&A target. Consider factors such as values, mission, leadership style, and corporate culture. A strong cultural fit can enhance post-merger integration and collaboration.
4. **Perform Due Diligence:** Conduct comprehensive due diligence on the potential M&A target. Evaluate financial records, legal contracts, operational processes, and any potential risks or liabilities. Seek professional advice to ensure a thorough assessment.
5. **Develop an Integration Plan:** Develop a detailed integration plan that outlines how the two companies will merge their operations, systems, and teams. Address key areas such as organizational structure, IT infrastructure, human resources, and client/patient transition. Effective communication and management strategies are crucial during this phase.
6. **Secure Financing:** Evaluate the financial implications and secure appropriate

financing. Consider the costs associated with the transaction, integration, and potential synergies. Explore funding options such as equity investments, debt financing, or strategic partnerships.

7. **Engage Stakeholders:** Engage key stakeholders throughout the M&A process, including employees, clients, investors, and regulatory bodies. Maintain transparent communication to address concerns, build trust, and ensure a smooth transition.
8. **Monitor Post-Merger Integration:** Continuously monitor the progress of post-merger integration and address any challenges or issues that arise. Regularly evaluate the success of the transition and make necessary adjustments to optimize the combined entity's performance.

By following these steps, post-acute care providers can position themselves for successful M&A opportunities and maximize the benefits of strategic partnerships in the dynamic landscape of the industry.



“The integration of two companies can be complex and challenging, requiring **effective communication, cultural alignment, and strategic decision-making.**”



Pitfalls of Mergers and Acquisitions in the Post-Acute Care Industry

While mergers and acquisitions can offer numerous benefits to post-acute care businesses, it is important to also highlight potential pitfalls to be aware of. These include:

1. **Cultural Clash:** When merging two organizations with different cultures, there can be challenges in aligning values, work styles, and communication methods. It is important to address cultural differences and foster a collaborative and unified culture to ensure successful integration.
2. **Integration Challenges:** Integrating two companies requires careful planning and execution. Challenges may arise in merging operational processes, IT systems, and teams. Poor integration can lead to inefficiencies, disruptions in service delivery, and decreased employee morale.
3. **Loss of Talent:** During the M&A process, there is a risk of losing key talent. Employees may feel uncertain about their roles, job security, or cultural fit. Retention strategies and clear communication can help mitigate this risk.
4. **Regulatory and Compliance Issues:** Home care businesses operate in a highly regulated industry in most states. Merging or acquiring another company may introduce new regulatory and compliance challenges. It is crucial to conduct thorough due diligence and ensure compliance with all applicable laws and regulations.
5. **Customer Disruption:** Mergers and acquisitions can cause disruptions in service delivery and client relationships. It is important to communicate changes to clients and maintain a high level of service during the transition to minimize client dissatisfaction.



6. **Financial Risks:** Merging or acquiring another company involves financial risks, such as overpaying for the acquisition or underestimating integration costs. Careful financial analysis and due diligence are necessary to avoid financial pitfalls.
7. **Loss of Focus:** The process of mergers and acquisitions can be time-consuming and divert resources and attention away from core operations. It is important to maintain focus on delivering quality care and service to clients throughout the M&A process.

By being aware of these potential pitfalls and addressing them proactively, providers can navigate the challenges of mergers and acquisitions to increase the likelihood of a successful integration.

Mergers and acquisitions present significant opportunities for post-acute care businesses to expand their reach, enhance their service offerings, and gain a competitive advantage. By carefully evaluating potential partnerships and executing well-planned integration strategies, providers can position themselves for long-term success in the ever-evolving healthcare industry. 

ABOUT THE AUTHOR

Jennifer Ramos is a California Licensed Business Broker with M&A Business Advisors, the Leader in Business Sales & Acquisitions. Jennifer has earned the designation of Certified Exit Planning Advisor (CEPA) from the Exit Planning Institute (EPI). Jennifer has also been a successful business owner with over 20 years of ownership and experience in the Health Care and Senior Care Industry having owned and operated Home Care agencies in both California and Colorado.

Jennifer states, “The ownership experience is an intimate one. Whether your business is a main street or a middle market enterprise, I understand your business is an extension of you. I appreciate the energy and years of hard work you put into your business and feel you deserve the freedom and reward that come with ownership well after you have transitioned from it.” In 2017, Jennifer launched JR3 Consulting Group, a consulting group that gives businesses a market advantage, promotes creative service development, and offers viable ways to achieve and sustain organizational and fiscal success for the purpose of driving value to the business. Her vast knowledge and understanding from the entrepreneur perspective are undeniable.

The Challenges of Technology in Post-Acute Care:

Managing Data, Compliance, and Changing Business Goals



Robin Tuck

Senior Product Owner
Rosemark System



Software is crucial to running a successful post-acute care business. Every organization will eventually deal with issues related to compliance requirements and changing industry trends.

Knowing that these challenges are imminent, or have possibly already landed at your agency's doorstep, the question becomes: where to start when talking about agency management software?

Post-Acute Care Complexity

Let's focus on a few common challenges specific to this industry and how you can overcome them.

Challenge #1: Legislation

If you provide Medicaid services, you know there are many rules to follow. However, these rules have recently

changed rapidly, and they vary by state. Rules from the Department of Labor also change frequently, presenting a huge challenge for post-acute care operators to responsively manage care staff.

The most important first step is understanding your business's compliance requirements so you can be sure you're recording the right data. These compliance requirements are different for each state and for each payor source like Long-Term Care Insurance or Veterans Administration. Once you have a firm understanding of what requirements your business must meet, the next crucial step is Data Quality and Consistency.

This is where the quality of your data is key. If you need to manage state requirements and changing labor laws, you need to know your key reports are providing accurate information so your agency can stay compliant with confidence.



Whether it's an established agency transitioning to software or a new organization that doesn't know what data to collect, we strongly recommend filling out all the information the home care management software asks for. This will cover a broad range of important details like Medicaid IDs and authorized hours for billing.

Data entry consistency can go a long way to making sure your information is accurate and up to date. Each user should know exactly what details need to go where.

Ask yourself these fundamental questions:

- Do you have a process for how staff should be adding or removing data from your software?
- How many staff know these processes?
- When was the last time someone reviewed what data was entered and where?

Remember, software can automate many processes, but it can't know if a client has moved unless a person updates that information. Make sure you have a process for data quality assurance. This can be as simple as quarterly spot checks on things like birth dates and addresses.



“Use software to help **reach goals and create more efficient workflow processes**, but don't expect it to work like magic.”

Challenge #2: Changes in Technology

Technology has changed dramatically over the past few decades. In just 25 years, the world has evolved from using paper and binders to using smartphones, WiFi, and online banking.

Customer and employee expectations have also changed in this industry. Clients want to pay online, families want to review care notes from states far away, and care staff expect to have real-time updates on their clients and schedules.

Clearly identify business goals to help you choose the right software. What does an agency want to achieve or accomplish? Is the goal to serve a specific community, increase market share, or just get off the ground? Answering these foundational questions will help an agency determine what software or technology may be needed to reach set goals.

If an agency is just getting started it may need simple software, something quick to learn and easy to use that helps organize the day-to-day basics.

As an agency grows, automation can help staff stay efficient while scaling up. At this stage, enterprise-level software with partnership integrations and exports can help differentiate an agency from its competitors.

Remember, software can be extremely beneficial, but most software, no matter its purpose, usually fixes 80% of the problem. If it does more, that's great!

Use software to help reach goals and create more efficient workflow processes, but don't expect it to work like magic. Just like one has to be taught how to swing a hammer to drive a nail in straight, software is a tool that needs to be learned to be used effectively.

Instead of looking at a giant pile of everything, let the software show what needs human attention. For example, administrators don't need an alert every time a caregiver clocks in successfully. Knowing if they don't clock in is much more important because it could mean something is wrong.

In an industry of care, software should automate repetitive tasks so agency staff and caregivers are free to add human touch where it's needed most.



Challenge #3: Changing Payer Landscape

One of the most well-attended breakout sessions at the 2023 HCAOA conference was: “Scaling Private Pay in the Age of Consolidation.”

With standing room only, agency owners and administrators listened to leaders in the industry discuss the importance of diversification. With private pay hours decreasing year-over-year, it’s more important than ever for agencies to look seriously at adapting to new payor sources.

Start by exploring options and asking these questions:

- Would expanding to Veterans Administration or Long-Term Care insurance offer more clients with better margins?
- Is the agency at a place where applying for Medicaid certification makes sense?
- What types of payors exist in the community of clients you care for?

Software solutions for billing and revenue cycle management can streamline the process of submitting claims and managing reimbursements. By centralizing payer information and automating billing workflows, agencies can efficiently adapt to new payer sources and diversify revenue streams without sacrificing efficiency.

KPI reporting tools can provide insights into the return on investment for various payer types as well as potential margins, enabling agencies to tailor their services and innovate effectively.

Software solutions are instrumental in empowering post-acute care businesses to adapt, grow, and excel in a rapidly changing industry landscape. By leveraging software for compliance and payer management, post-acute care agencies can elevate the quality of care they provide while driving business growth and sustainability. As the post-acute care industry continues to evolve, embracing software as a strategic asset will be the key to success.

ABOUT THE AUTHOR

Robin Tuck is the Senior Product Owner at the [Rosemark System](#), a home care management software provider. A seasoned veteran in the home care technology space, Robin is passionate about finding creative solutions to help her customers get the most out of their software, so they can focus more on their caregivers and clients. When she’s not working, she’s probably writing, taking walks, or stripping 800 layers of paint off every inch of her 140-year-old house.



SUMMARY

Customer & Employee Experience

With over 750 thousand customer and employee satisfaction surveys performed in the last year alone, Activated Insights has a thorough understanding of the customer and employee experience. Much of this section is directly informed by data from our surveys.

This section walks you through key measures of customer and employee experience, including satisfaction, Net Promoter Scores® (NPS), and Employee Net Promoter Scores® (eNPS), providing tips for improving each along the way.



Section Contents

- 188** Impact on Customer & Employee Experience with Activated Insights
- 189** Activated Insights Recruit Case Study
- 191** Customer Satisfaction
- 194** Employee Satisfaction
- 197** Diversity, Equity, Inclusion, & Belonging
- 199** Key Statistics from the 2024 Best of Home Care® Awards



IMPACT ON CUSTOMER & EMPLOYEE EXPERIENCE WITH ACTIVATED INSIGHTS

Organizations that manage their customer and employee experience using Activated Insights...

30%

generate 30% more
in annual revenue

90%

hire 90% more care
professionals in 2023

78%

receive 78% more
annual inquiries

3.2x

experience 3.2x greater
lifetime value per client

Businesses that actively manage their customer and employee experience, staff training, and employer brand are seeing long-term business growth.

Our customers receive more referrals and generate more revenue because they compete on value, not price. They also attract more applicants and retain their staff longer.

**These numbers were calculated by comparing agencies using 2 or more of our products to agencies not using any Activated Insights product.*

Drive Long-Term Growth and Become the Business Where Employees Want to Work.

Improving your customer and employee experience affects every part of your organization. Get the tools you need to actively manage customer and employee experience, turn good care teams into great care teams, take control of your online reputation, and accomplish your business goals.

Request a Demo:

activatedinsights.com/demo



877.307.8573

info@activatedinsights.com



ACTIVATED INSIGHTS RECRUIT CASE STUDY

From No-Shows to Reschedules: How Automated Recruitment Grew Klipsch Senior Care, a Home Instead Franchise, Interview Show Rate by 40%



Klipsch Senior Care
Indiana

It's a vicious cycle all too familiar for providers in post-acute care.

A candidate applies and an interview is booked, only to result in a no-show—leaving post-acute care providers overwhelmed, overworked, and out of staff in the never-ending revolving doors of recruitment and retention.

For Klipsch Senior Care, a Home Instead franchise, this scenario happened in one out of every five interviews.

That is, until Recruit's automated reengagement and nurturing drip campaigns.

Automated Reengagement & Nurturing Campaigns: Performing Recruitment CPR

The phrase, “Right person, wrong time,” doesn't just pertain to relationship advice—it also applies to recruiting care staff.



In 2021, Klipsch Senior Care in Indiana implemented Recruit—an automated outreach and engagement platform designed to help them connect, qualify, interview, and hire top talent faster than they could on their own.

One day, a candidate from Evansville, Indiana applied to work at Klipsch Senior Care, only to end up choosing to work for another company, and thus continued the vicious cycle of recruitment and retention.

For a company without Recruit, this rejection would have been a dead end. The likelihood of seeing that candidate again would have been slim to none.

But because Klipsch Senior Care was using Recruit, this missed opportunity was only the beginning.

Six months after the candidate from Evansville initially turned Klipsch Senior Care down, Recruit sent an automated follow-up message from Klipsch Senior Care assuring the applicant that they would love to have them back for an interview if they were still interested.

The hook was set. With the help of Recruit's automated reengagement and nurturing campaign, Klipsch Senior

Care's Recruitment Lead, Roy Robertson, found himself onboarding candidates who had applied long before he was hired to recruit them.

Applicant profiles that would normally be lost along the recruitment pipeline were being resurrected at the right time for them. Robertson said, ***“To me, that is the value of Recruit.”***

Speed, Convenience, & Ease: From Three Days to One Hour

Research shows that your best candidates are off the market in 48 hours.

This proved to be problematic for Klipsch Senior Care, which, like most in the post-acute care industry, took two to three days (at best) to respond to applicants prior to implementing Recruit.

Recruit's integration with HR software enabled Robertson to send out an automated response to each applicant within an hour of their application, decreasing response time by 97%.

“[Recruit's] integration with HR software enabled Robertson to send out an automated response to each applicant within an hour of application—**decreasing response time by 97%.**”



ACTIVATED INSIGHTS RECRUIT CASE STUDY

“It’s invaluable for a recruiter, at an individual office level, to be able to engage with 15 to 20 candidates and make it personal but not be constantly tied to a phone.”

This was a recruitment “game-changer” for Robertson because not only did these automations drastically improve response times, but they were also improving their show rates.

“[Recruit] helps keep employees engaged from the time they schedule that interview to the day before, where they get a reminder an hour before. As a result, we’re getting less no-shows and more reschedules. To me, that’s still a win... because we’re keeping the candidate engaged.”

Upon gathering feedback from his new hires, Robertson understood the value in personalizing his automated outgoing text messages. New hires credited the GIFs and emojis in his messages to be the difference between Klipsch Senior Care’s text messages sounding automated versus acting as a testament to the company’s unparalleled response time.

“Because we have to wait for background checks to come back, there is sometimes a week gap between an offer and [an employee’s] first day. Being able to stay engaged with them and to follow up on their onboarding paperwork in the meantime is terrific.”

“For traditional franchises like us, **having partners like [Recruit] is invaluable** because it gives us access to that technology without having to change our entire business model.”

While Klipsch Senior Care began onboarding candidates faster, they didn’t have to sacrifice their quality of candidates for quantity of hires. In fact, the opposite happened.

Optimizing the Staff You Have: Using Advanced Recruitment as a Retention Tool

As Klipsch Senior Care consists of five Home Instead franchise locations, Robertson’s recruitment role covers a lot of ground.

But with a 77% annual employee turnover rate and interview no-shows on the rise, many home-based care providers have depleted their resources to the point where there aren’t enough care employees to go around.

This means you must refine your hiring process to attract high-quality, long-term candidates through data-driven recruitment and retention.

Recruit’s customizable pre-screening process allows Robertson to do just that.

“I really appreciate the automations, the triggers, and just frankly, the ease of use of [Recruit]... I have the visibility to say, ‘Hey, this person’s actually a little bit closer to this office. Let’s reallocate their application over here,’ and with Recruit, that communication is seamless.”

By using Recruit to identify and place candidates where they would be most successful, Klipsch Senior Care was able to tackle two major industry challenges at the same time.

“Recruitment and retention used to be two separate roles, whereas now, I can combine that role into one.”

Recruit equipped Klipsch Senior Care to transform their recruitment experience from staff resignation to employee retention, all while allowing them to focus on what they do best—care for their clients.

With recruitment well underway, Robertson is now looking into Activated Insights Retain to keep his new employees engaged and happy working for Klipsch Senior Care for years to come. 



CUSTOMER SATISFACTION

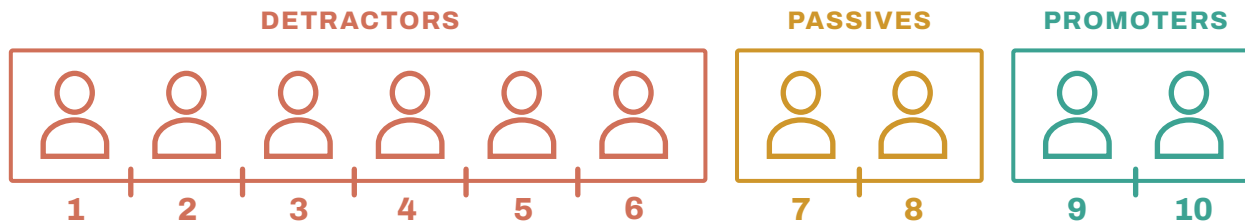
6.1 Net Promoter Score® (NPS) Calculations

Net Promoter Score is based on one question:

“How likely are you to recommend [company name] to others?”

It is rated on a scale of 1-10, 10 being “highly likely to recommend.”

Based upon the answer customers provide, they are categorized into three groups:



1. Promoters (score 9-10) are loyal enthusiasts who will keep using your services and refer others, fueling growth.

2. Passives (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.

3. Detractors (score 1-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

How do I use Net Promoter Score?

A Net Promoter Score isn't the end goal in and of itself—customer growth and satisfaction are. Using NPS to track your progress helps you identify whether you're truly making progress at improving the experience you provide your customers.

NPS won't help you much if you only occasionally check it. You need to track it closely, gather feedback as to why customers give the answers they do, and use it to power decisions. The most successful agencies are those that track trends over time and use this data to influence decisions, including compensating their care professionals based on customer satisfaction scores.

If you would like to see how your Net Promoter Score® compares to that of the industry, contact Activated Insights at info@activatedinsights.com or 877.307.8573.

® Net Promoter Score and NPS are Registered Trademarks for Bain & Company, Fred Reichheld and Satmetrix Systems, Inc.

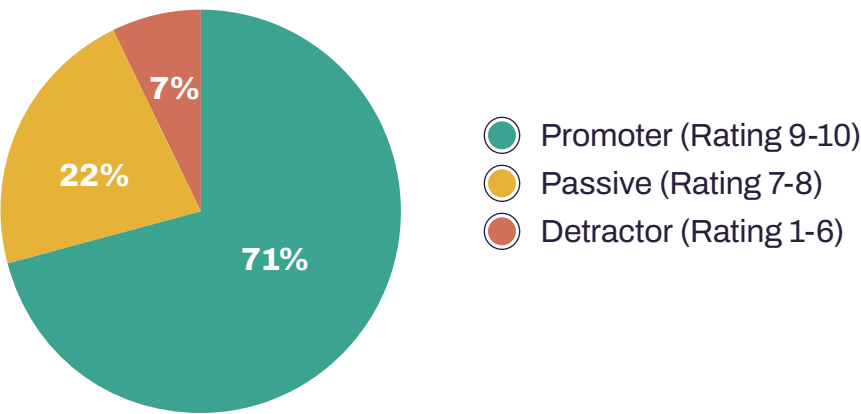
NPS Calculation

To calculate your Net Promoter Score, take the percentage of customers who are promoters and subtract the percentage who are detractors.



CUSTOMER SATISFACTION

6.2 Home Care Customer Net Promoter Score® (NPS) Breakdown



2023 Net Promoter Score

6.4

This data is taken from over 116,000 Activated Insights Experience Surveys with home care customers in 2023.

Why is Net Promoter Score important?

Companies with high Net Promoter Scores grow at more than twice the rate of their competitors on average. Achieving and maintaining a high NPS can help you turn your customers into your marketing department by ensuring they're promoters. It also helps you keep your services top-notch and facilitate growth and referrals.

Using NPS allows you to segment your customers into promoters, passives, and detractors so you know who to approach for referrals, who needs a little extra "wow" factor, and who is vulnerable to leaving your services.

See how your Net Promoter Score® compares to the industry. Talk with a client/care professional experience expert at info@activatedinsights.com or 877.307.8573.

<http://www.netpromotersystem.com/about/how-is-nps-related-to-growth.aspx>

CUSTOMER SATISFACTION

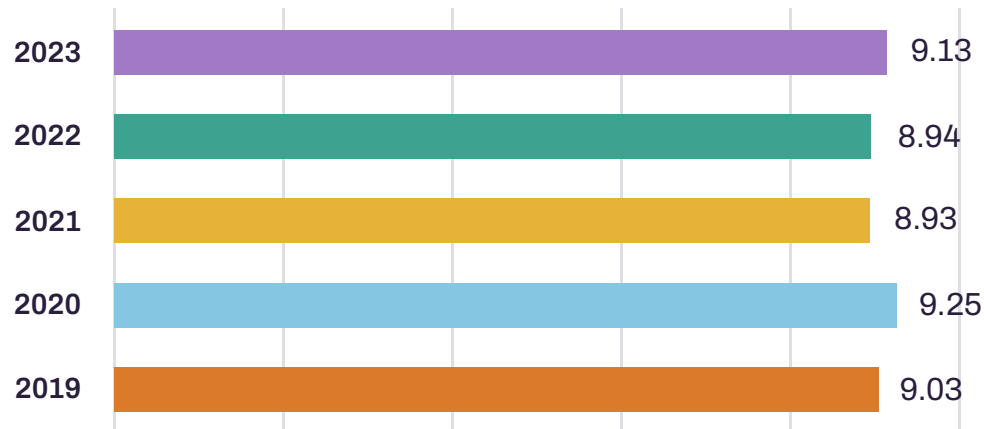
6.3 Home Care Historical Customer Net Promoter Score® (NPS)



This data is taken from over 116,000 Activated Insights Experience Surveys with home care customers in 2023.



CUSTOMER SATISFACTION

6.4 **Home Care** Overall Customer Satisfaction - Historical

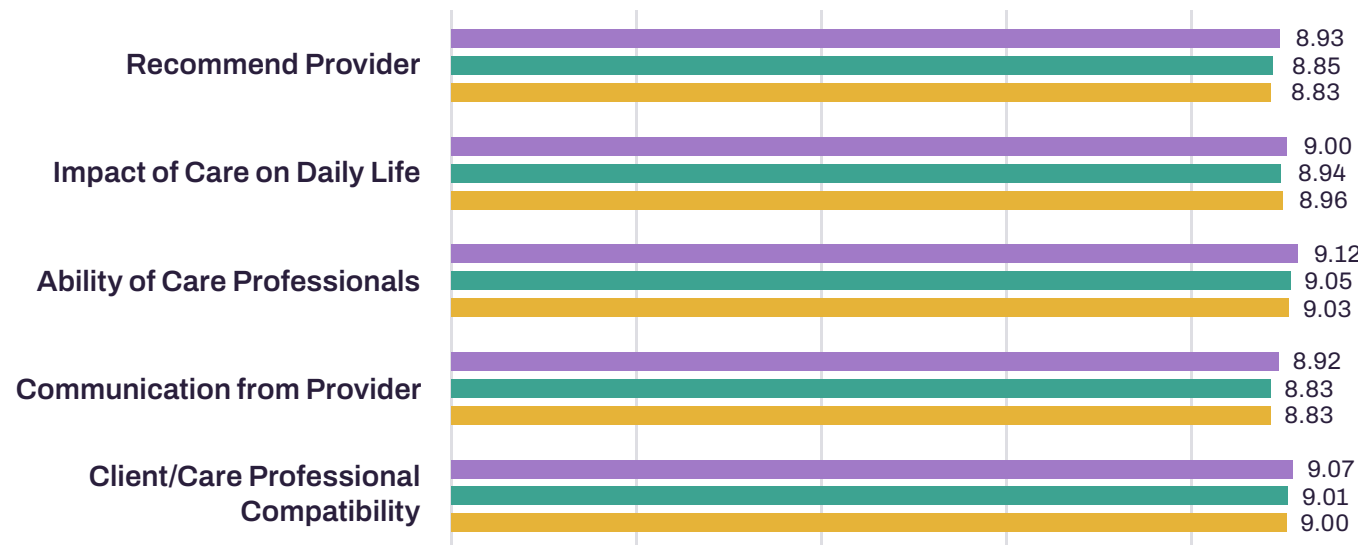
2023 Overall Customer Satisfaction

9.13

Overall Customer Satisfaction (OSAT) takes the average score of all rated questions in the Activated Insights Experience Survey. This metric is particularly useful for measuring satisfaction after a specific change or event.

This data is taken from over 116,000 Activated Insights Experience Surveys with home care customers in 2023.

CUSTOMER SATISFACTION

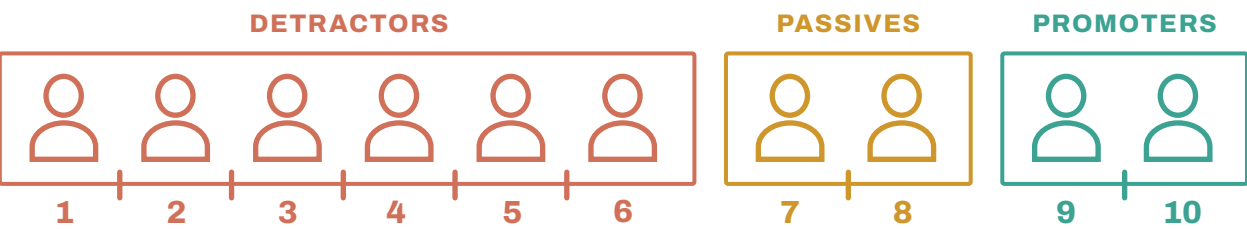
6.5 **Home Care** Historical Industry Average Customer Satisfaction Scores - Category

The 2023 data is taken from over 116,000 Activated Insights Experience Surveys with home care customers. Displayed are the average satisfaction scores for the rated categories.

EMPLOYEE SATISFACTION

6.6 Employee Net Promoter Score® (eNPS) Calculations

Employee Net Promoter Score is based on one question:
“How likely are you to recommend [company name] to others?”
It is rated on a scale of 1-10, 10 being “highly likely to recommend.”
Based upon the answer customers provide, they are categorized into three groups:



- 1. Promoters (score 9-10)** are loyal enthusiasts who will keep using your services and refer others, fueling growth.
- 2. Passives (score 7-8)** are satisfied but unenthusiastic employees who are vulnerable to competitive offerings.
- 3. Detractors (score 1-6)** are unhappy employees who can damage your brand and impede growth through negative word-of-mouth.

Why is Employee Net Promoter Score (eNPS) important?

As long as the staffing shortage continues, eNPS will be particularly important because it can help you measure and improve your ability to recruit new care professionals through referrals from existing employees.

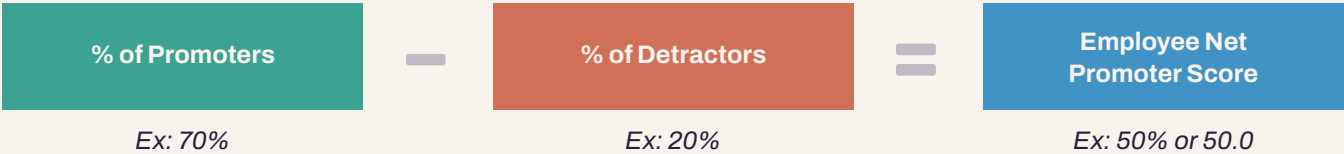
Employee Net Promoter Score helps you generate more employee referrals by tracking how your current efforts and new initiatives are influencing the likelihood of your workforce recommending you to others.

Care professionals recruited through employee referrals typically have the lowest turnover rates of any recruitment source.

If you would like to find out how your Employee Net Promoter Score® compares to that of the industry, contact Activated Insights at info@activatedinsights.com or 877.307.8573.

eNPS Calculation

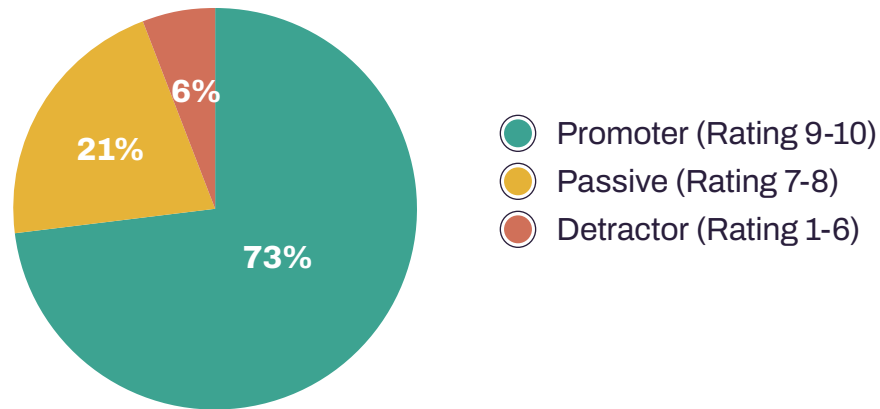
To calculate your Employee Net Promoter Score, take the percentage of care professionals who are promoters and subtract the percentage who are detractors.





EMPLOYEE SATISFACTION

6.7 Home Care Employee Net Promoter Score® (eNPS) Breakdown



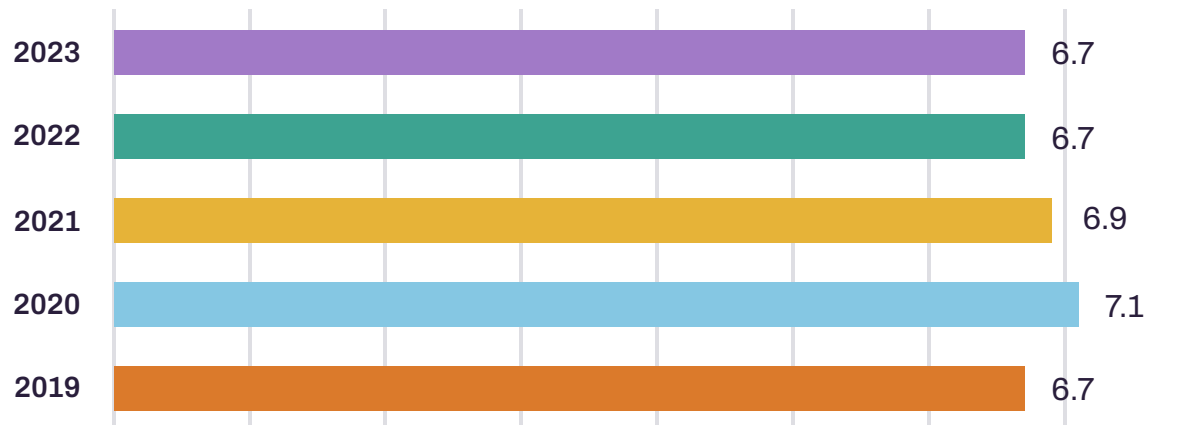
2023 Employee Net Promoter Score

6.7

This data is taken from over 96,000 Activated Insights Experience Surveys with home care customers in 2023.

EMPLOYEE SATISFACTION

6.8 Home Care Historical Employee Net Promoter Score® (eNPS)

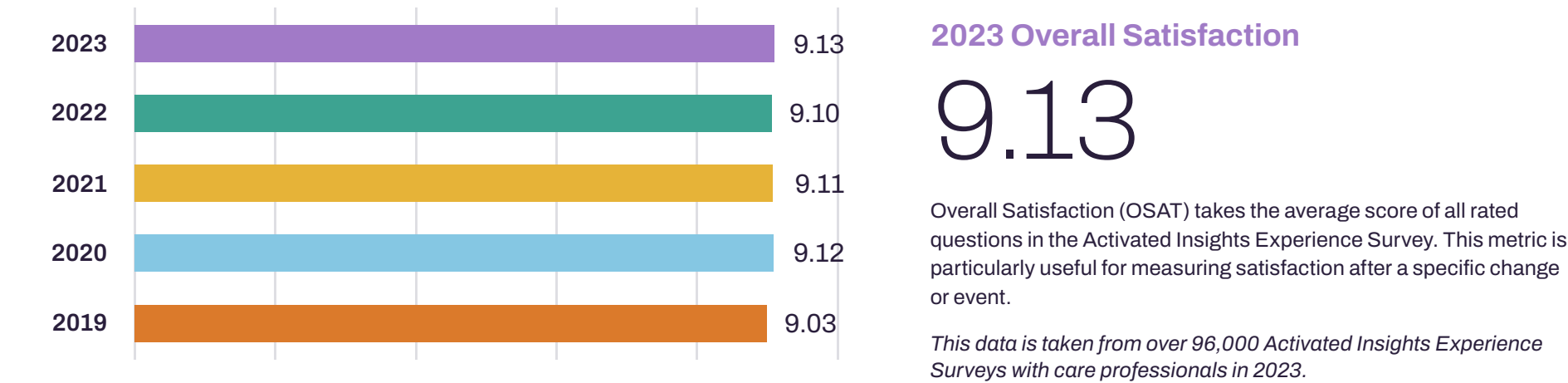


This data is taken from over 96,000 Activated Insights Experience Surveys with care professionals in 2023.

If you would like to see how your Employee Net Promoter Score compares to that of the industry, contact Activated Insights at info@activatedinsights.com or 877.307.8573.

EMPLOYEE SATISFACTION

6.9 Home Care Overall Care Professional Satisfaction - Historical



EMPLOYEE SATISFACTION

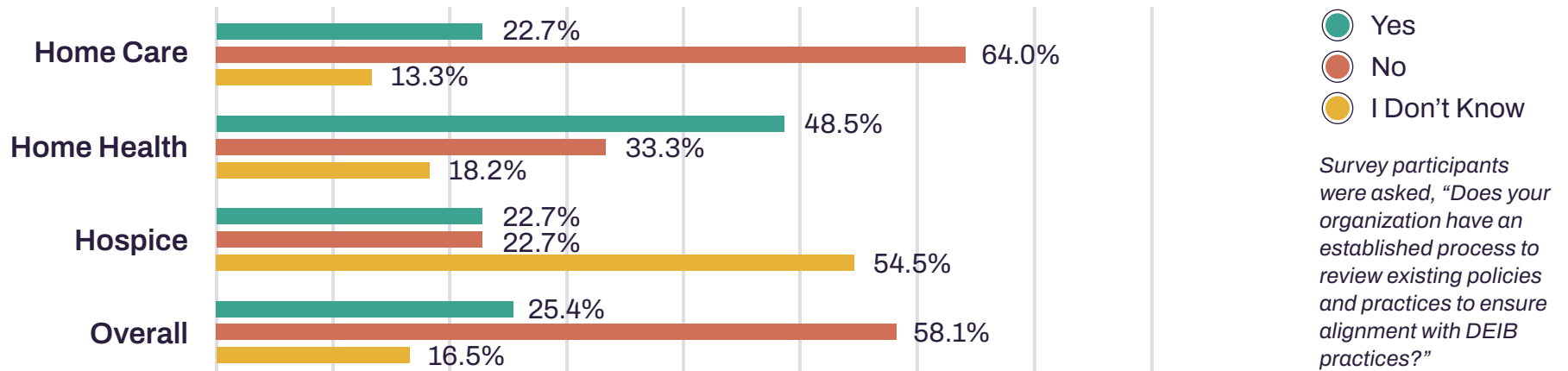
6.10 Home Care Historical Industry Average Care Professional Satisfaction Scores - Category





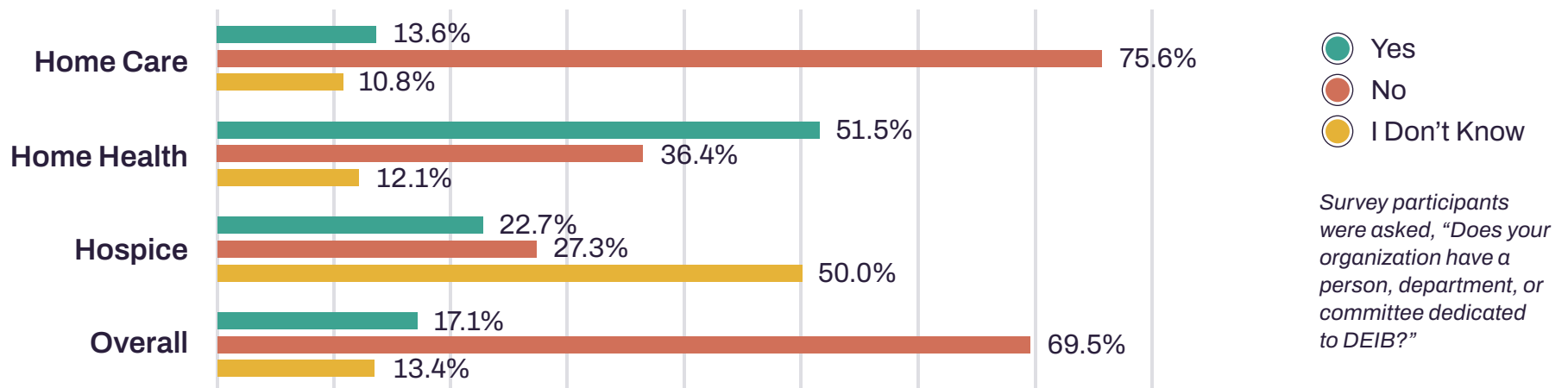
DIVERSITY, EQUITY, INCLUSION, & BELONGING

6.11 Overall Organizations With an Established Process for Diversity, Equity, Inclusion, & Belonging (DEIB) Practices



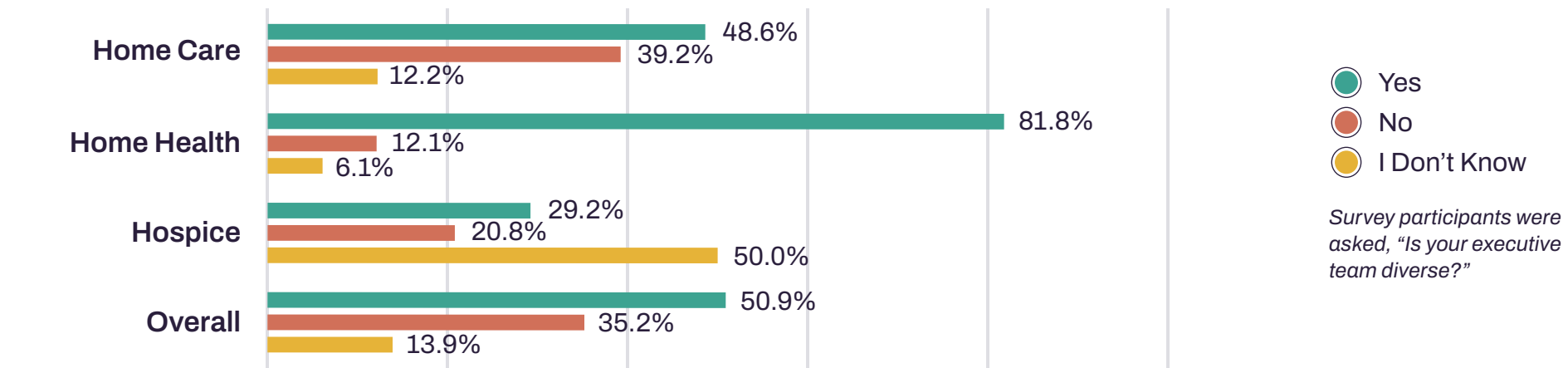
DIVERSITY, EQUITY, INCLUSION, & BELONGING

6.12 Overall Organizations With a DEIB Department



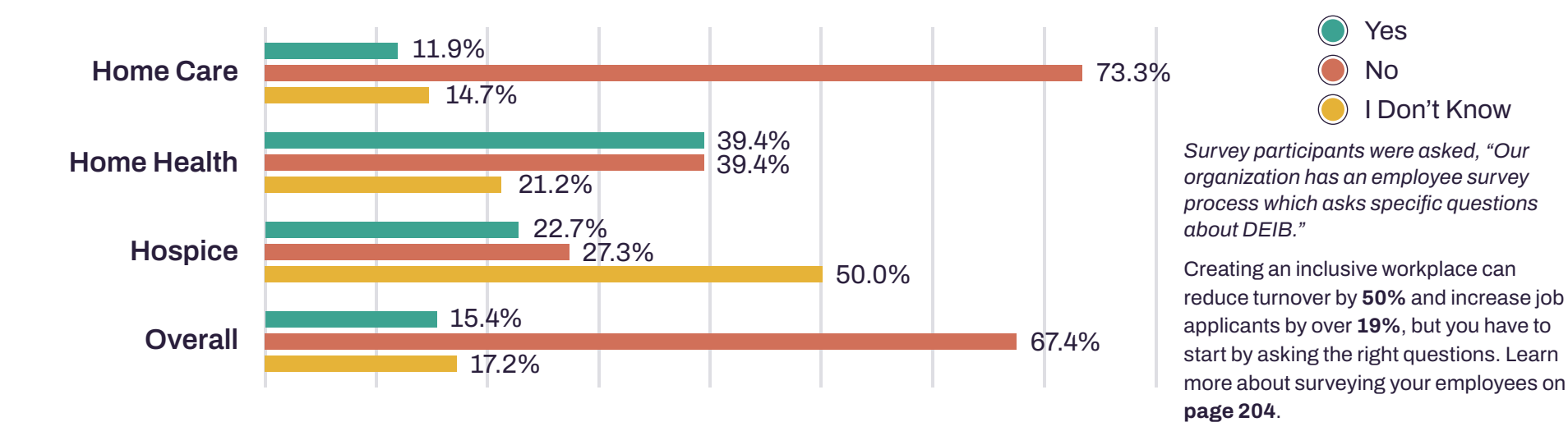
DIVERSITY, EQUITY, INCLUSION, & BELONGING

6.13 Overall Organizations With a Diverse Executive Team



DIVERSITY, EQUITY, INCLUSION, & BELONGING

6.14 Overall Organizations That Ask DEIB Questions in Their Survey Process





Key Statistics from the
2024 Best of Home Care®
Top 100 in Experience Award



Total Leader in Experience award-winning locations: 100	States with the most Top 100 in Experience award-winning providers: Texas 19 Award-Winning Locations Top 5 States Texas: 19 Georgia: 7 Illinois: 6 New Jersey: 6 Virginia, Pennsylvania, California: 5	Region with the most Top 100 in Experience award-winning providers: Northeast 32 Award-Winning Locations Region Ranks Northeast: 32 Central: 29 Southern: 18 Great Lakes: 15 Pacific: 6
Out of the Top 100, the Average OSAT score in 2023 was: 9.44	First-time award-winning locations in 2023: 45	Number of repeat award-winning locations: (from last year) 20

Key Statistics from the

2024 Best of Home Care® Leader in Training Award



Total Leader in Training
award-winners:

392



Highest course completion
by learner in 2023:

42

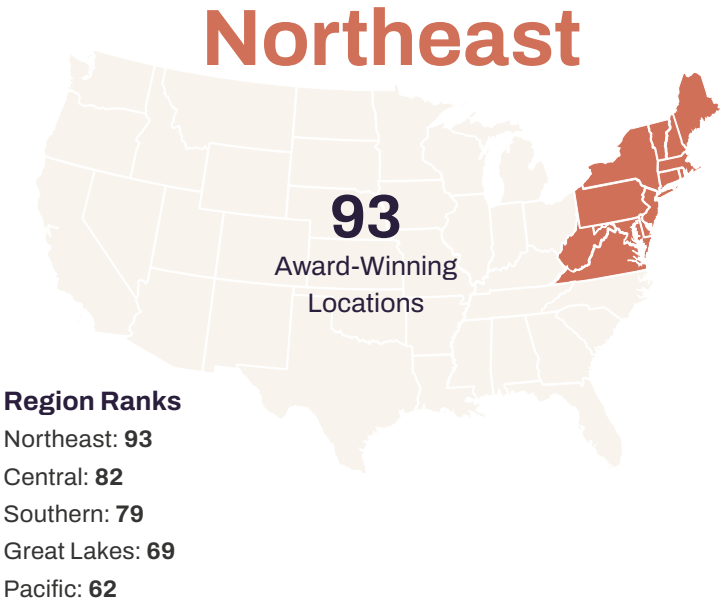
State with the most Leader in Training
award-winning providers:



Top 5 States

- Pennsylvania: 24
- Oregon: 23
- Iowa: 22
- Washington: 20
- Georgia: 18

Regions with the most Leader in Training
award-winning providers:



Hours of completed courses across all
winners in 2023:

356,192

Number of repeat award-winning locations:
(from last year)

122



Key Statistics from the
2024 Best of Home Care®
Leader in Experience Award



Total Leader in Experience
award-winning locations:

468



Number of agencies
that have earned 5 or more
years total:

82

State with the most Leader in Experience
award-winning providers:



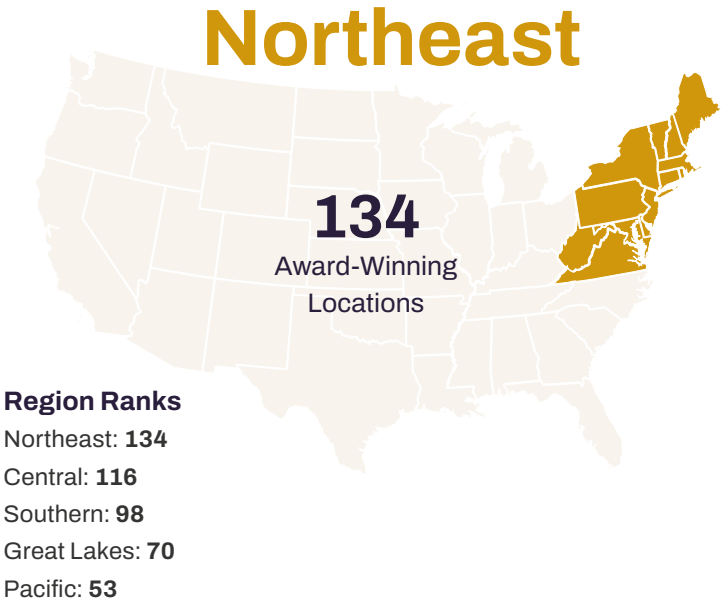
Top 5 States

Texas: **55**
California: **36**
Florida: **30**
Pennsylvania: **26**
New Jersey: **24**

First-time award-winning
locations in 2023:

128

Regions with the most Leader in Experience
award-winning providers:



Number of repeat award-winning locations:
(from last year)

303

Key Statistics from the

2024 Best of Home Care® Provider of Choice Award



Total Provider of Choice
award-winning locations:

1,373



Number of agencies
that have earned 5 or more
years total:

293

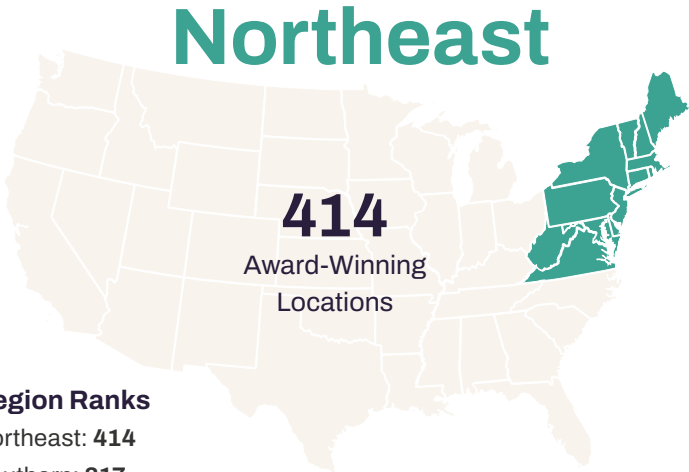
State with the most Provider of Choice
award-winning providers:



Top 5 States

- Texas: **140**
- Pennsylvania: **121**
- Florida: **112**
- California: **99**
- New Jersey: **93**

Region with the most Provider of Choice
award-winning providers:



Region Ranks

- Northeast: **414**
- Southern: **317**
- Central: **306**
- Great Lakes: **182**
- Pacific: **159**

First-time award-winning
locations in 2023:

227

Number of repeat award-winning locations:
(from last year)

944



Key Statistics from the
2024 Best of Home Care®
Employer of Choice Award



Total Employer of Choice
award-winning locations:

1,199



Number of agencies
that have earned 5 or more
years total:

296

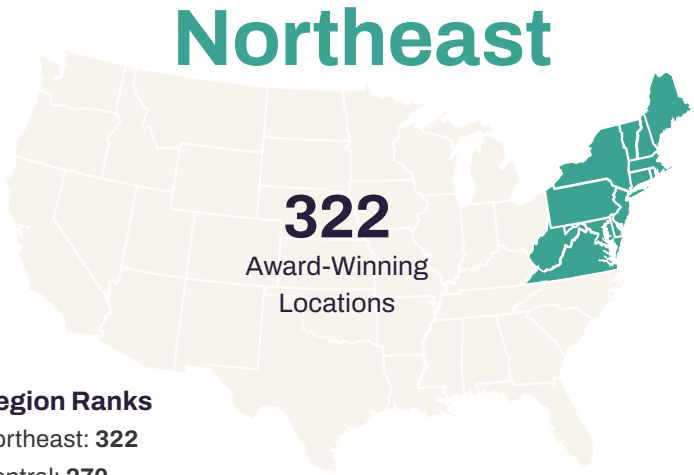
State with the most Employer of Choice
award-winning providers:



Top 5 States

Texas: **126**
California: **109**
Florida: **87**
Pennsylvania: **81**
New Jersey: **51**

Region with the most Employer of Choice
award-winning providers:



Region Ranks

Northeast: **322**
Central: **270**
Southern: **270**
Great Lakes: **171**
Pacific: **169**

First-time award-winning
locations in 2023:

171

Number of repeat award-winning locations:
(from last year)

943

Build a **Reputation** Customers and Job Candidates Can't Ignore

There's no overstating the power of feedback for your home-based care business. What employees and customers say about you—and how you respond—can make or break your reputation, ability to recruit, and overall success.



By the numbers:

94% of people say negative reviews have convinced them to avoid a business.

270% Displaying reviews can result in a 270% increase in conversion rates.

86% of employees and job seekers research reviews on a business and ratings to determine whether they should apply for a job.

Turn feedback into fuel for a 5-star reputation

Combining Activated Insights **Experience Management** and **Recognition** gives you a powerful combination of tools to collect, analyze, and utilize customer and employee feedback to your advantage.

The truth is out there. Experience Management and Recognition allow you to discover it so you can improve the bad, promote the good, and eliminate the ugly.



Learn more about this 1-2 punch for building a stronger reputation.

Explore Activated Insights **Experience Management** and **Recognition** today!



SUMMARY

Participation Summary

The Participation Summary provides an overview of the participants whose data is included in this Report, including years in business, provider type, geographic location, and annual revenue. This section gives insight into the makeup of survey respondents who made this year's Report possible.

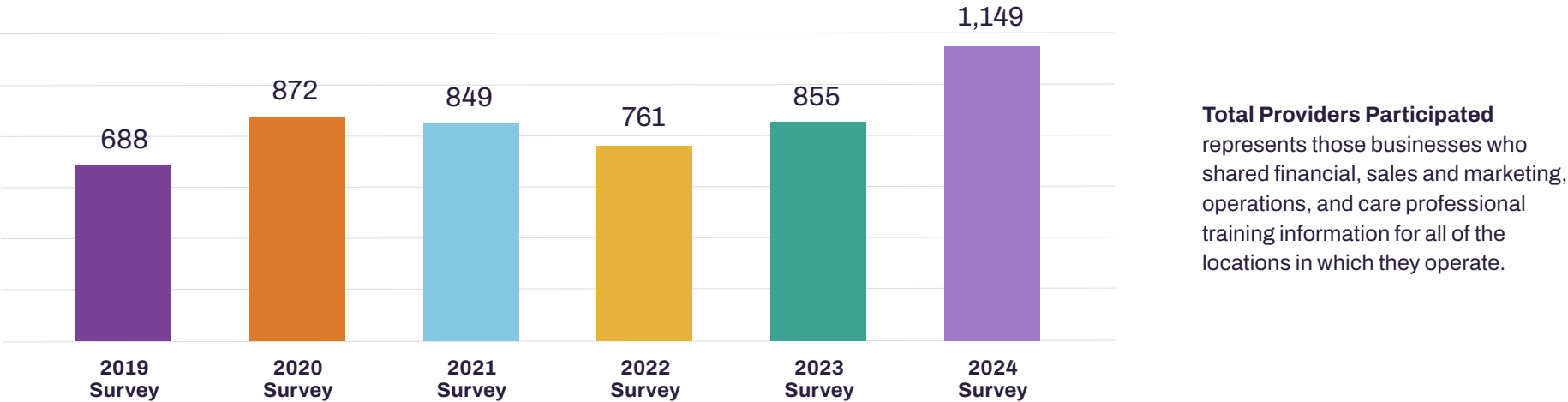


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- 206** Overall Survey Participation
- 212** Survey Participation by Lines of Business
- 220** Masters Definition
- 221** Home Care Masters Survey Participation

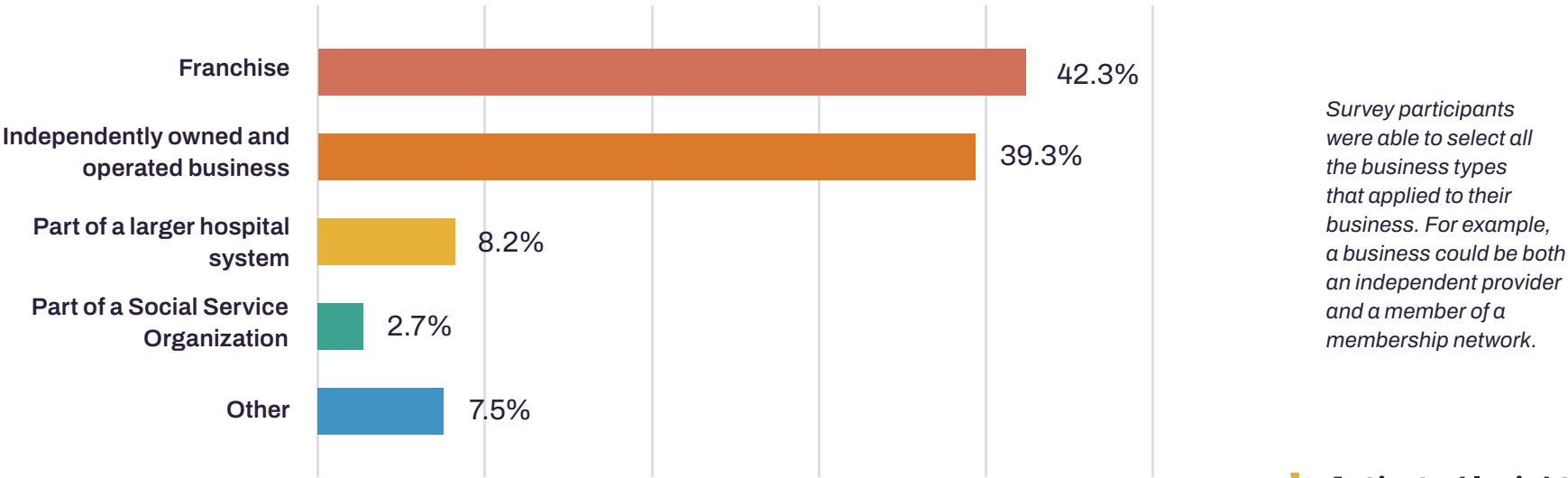
OVERALL SURVEY PARTICIPATION

7.1 Historical Total Participation - Providers



OVERALL SURVEY PARTICIPATION

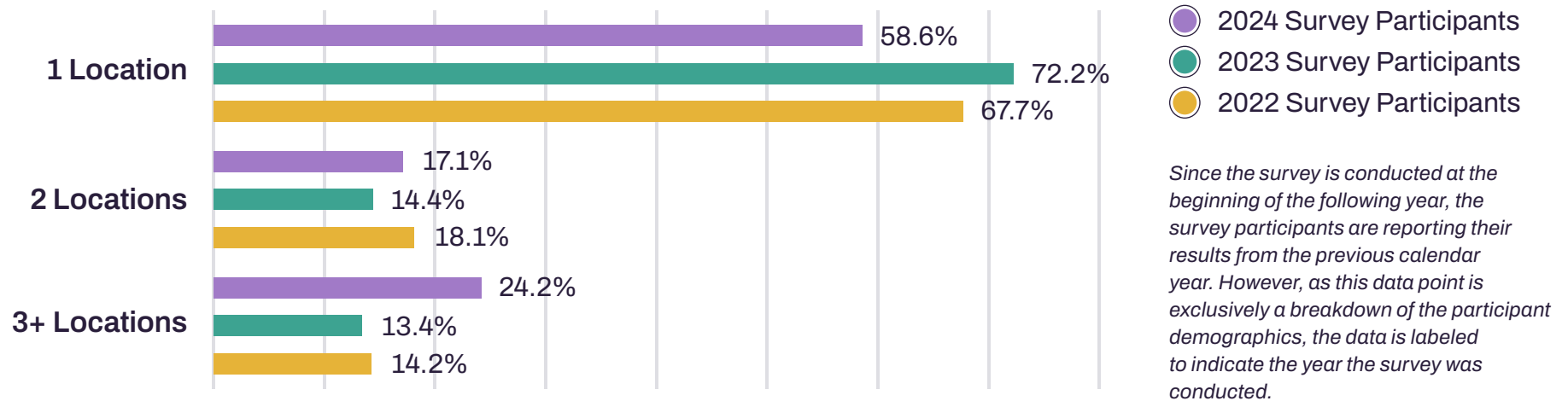
7.2 Participation by Provider Type for 2023 Report





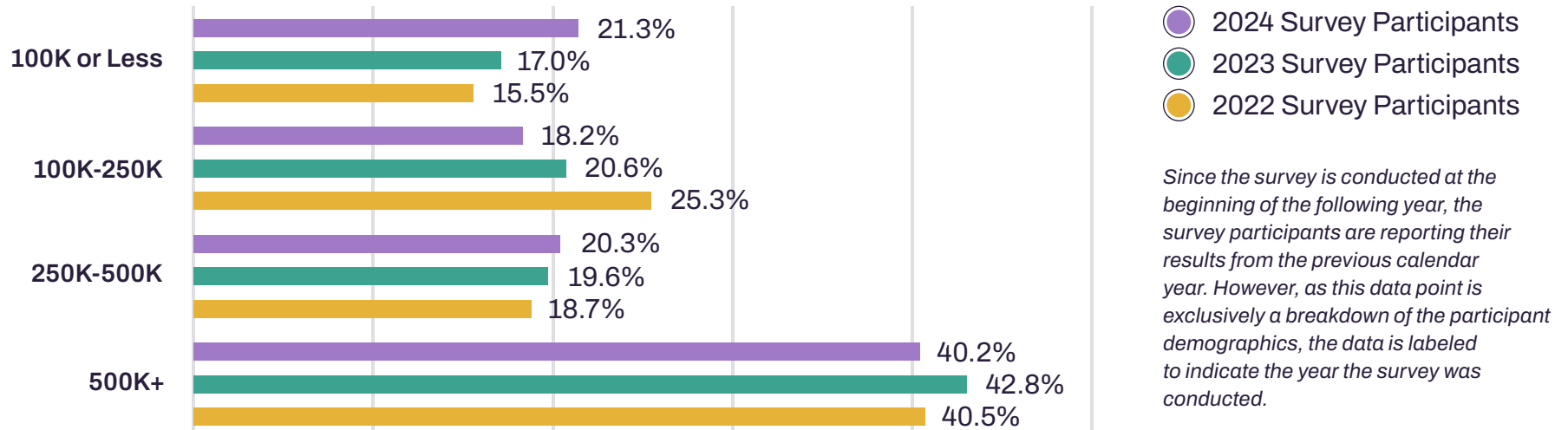
OVERALL SURVEY PARTICIPATION

7.3 Historical Participation by Number of Locations



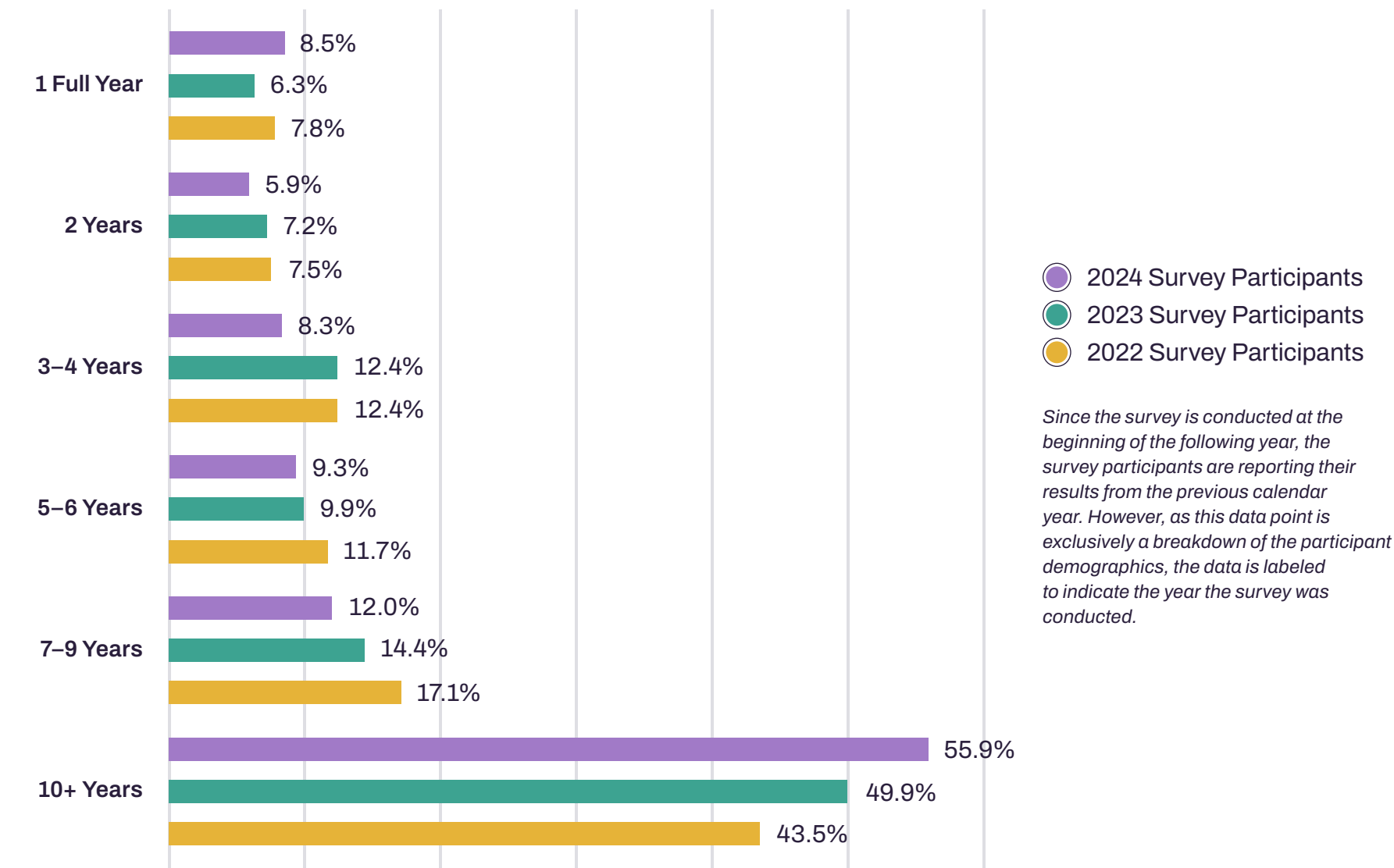
OVERALL SURVEY PARTICIPATION

7.4 Historical Participation by Populations Served



OVERALL SURVEY PARTICIPATION

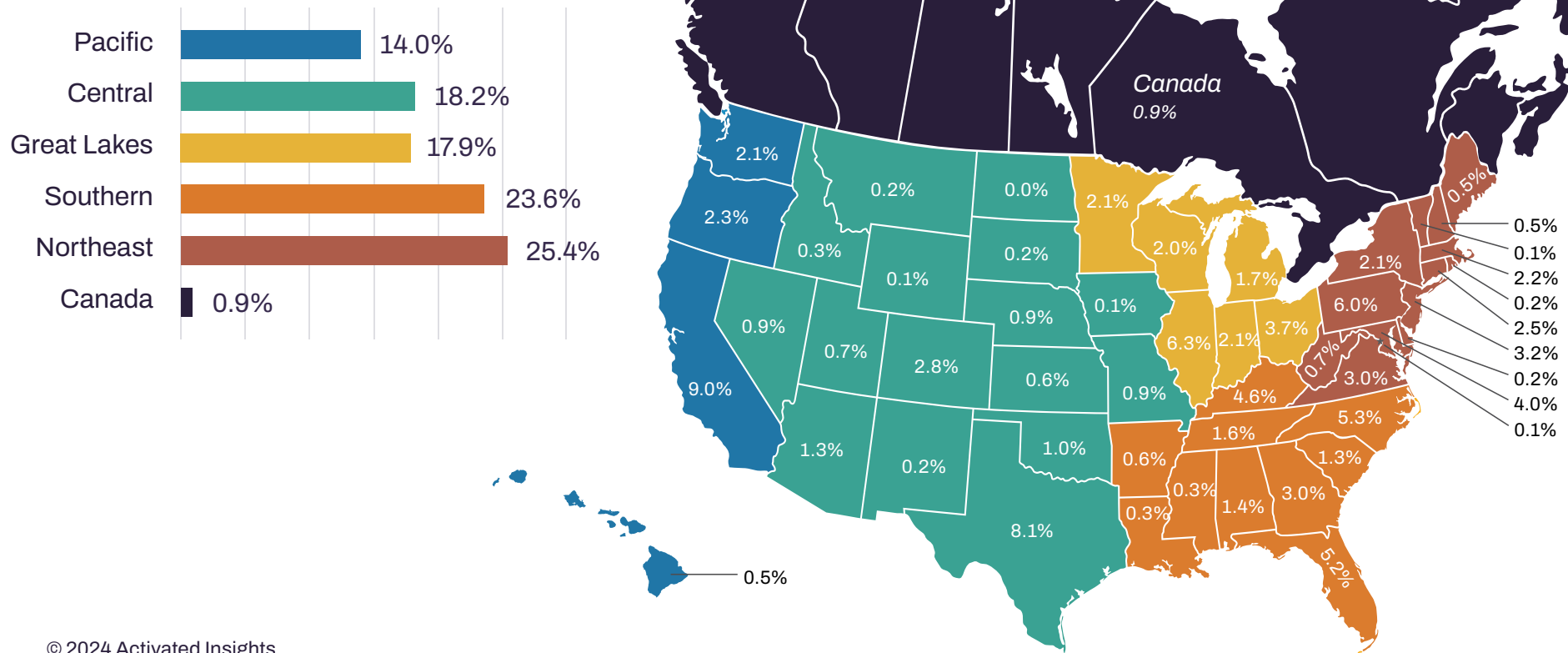
7.5 Historical Participation by Years in Business





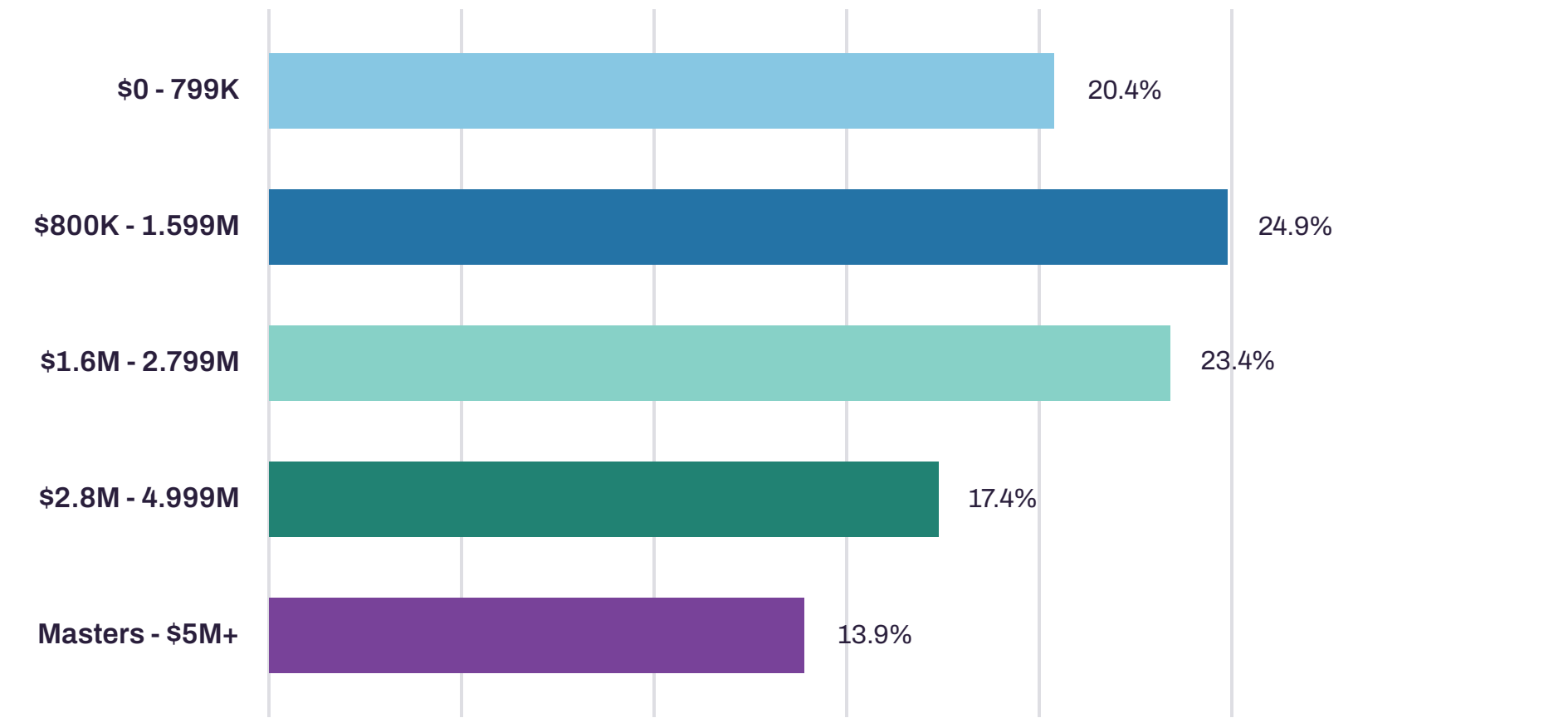
OVERALL SURVEY PARTICIPATION

7.6 Participation by U.S. State & Canada for 2024 Report



OVERALL SURVEY PARTICIPATION

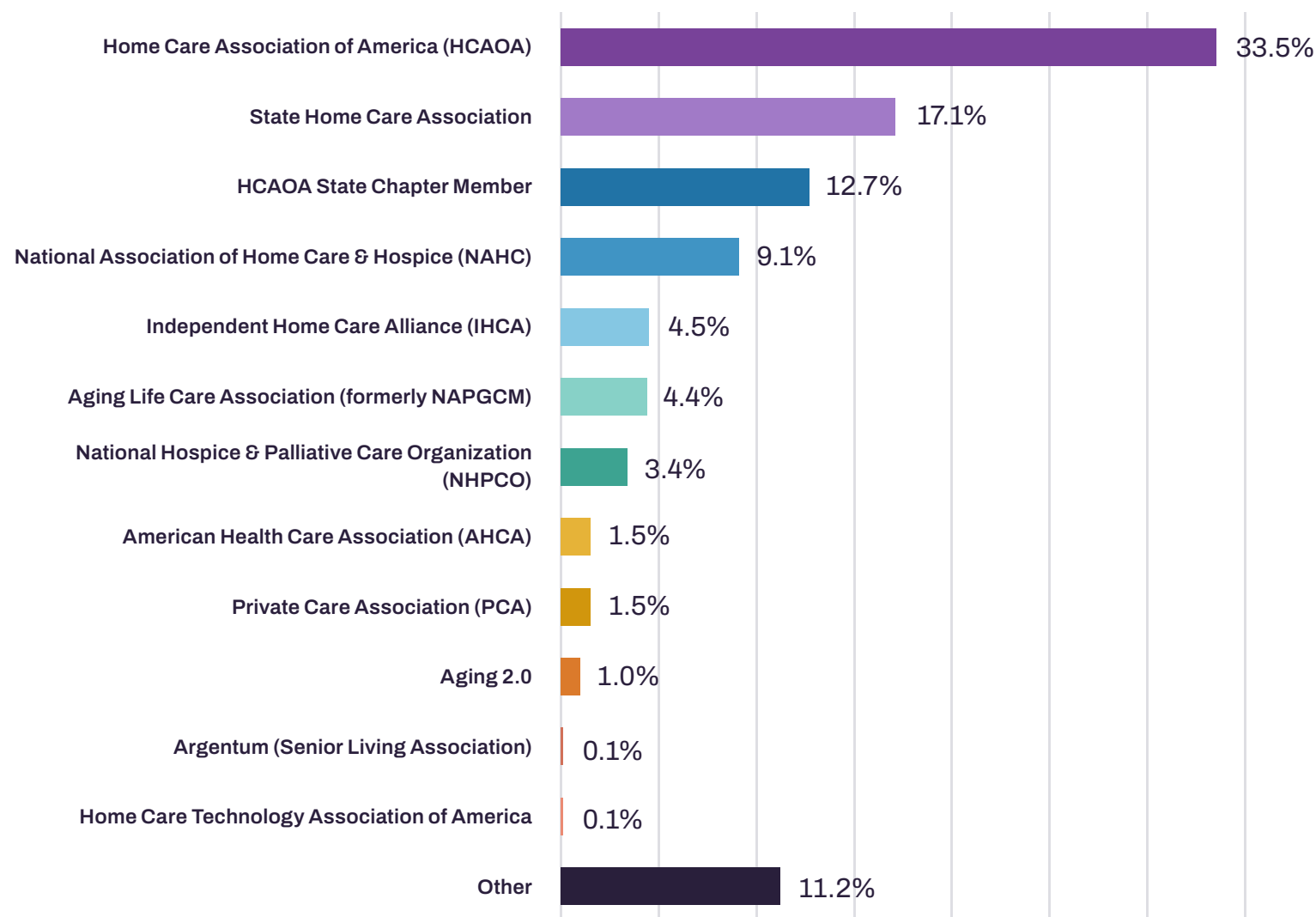
7.7 Participation by Revenue Range for 2024 Report





OVERALL SURVEY PARTICIPATION

7.8 Membership Associations for 2024 Report



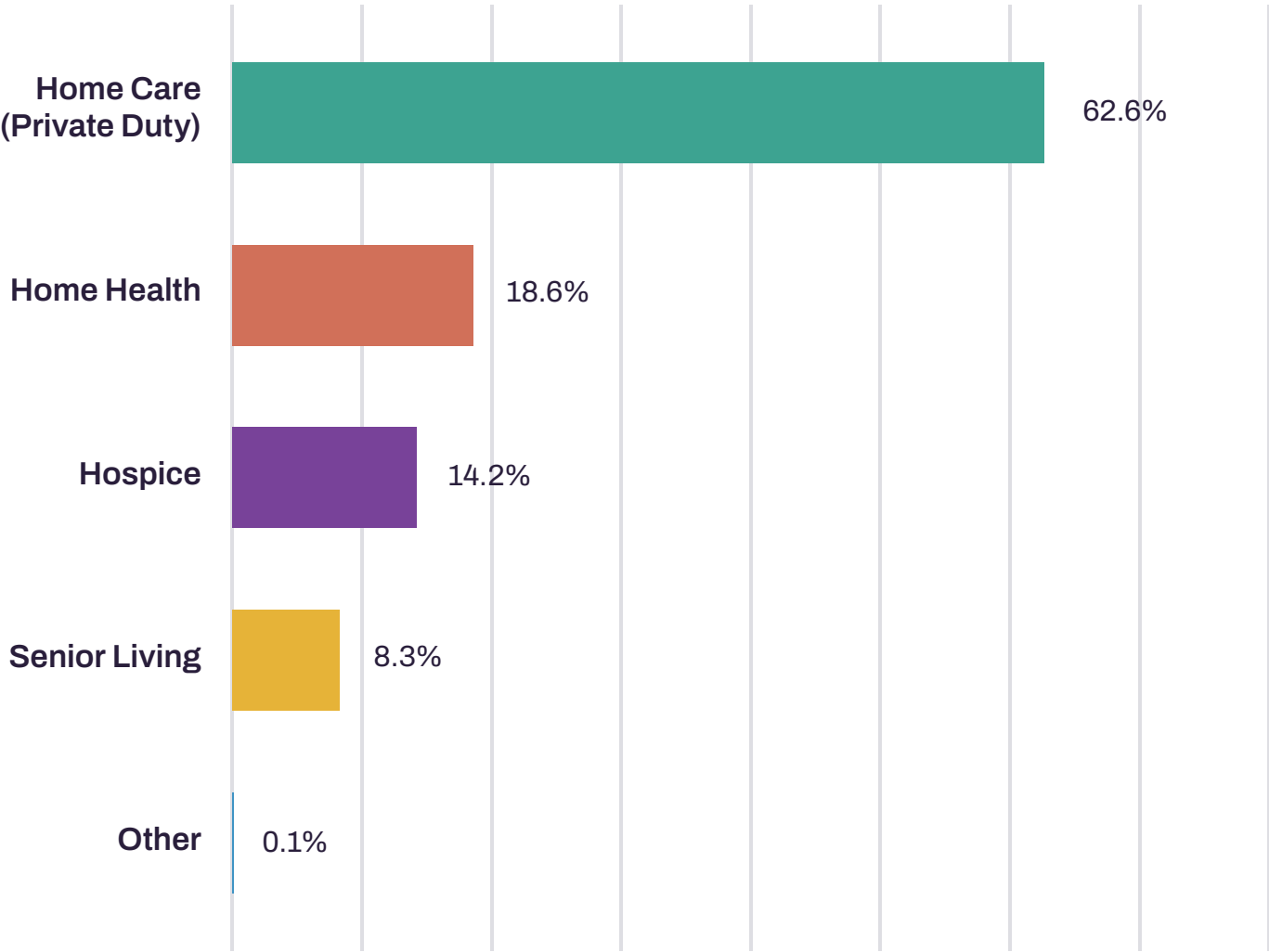
OTHERS MENTIONED:

- Aging Life Care Association
- APTA Home Health
- Association for Death Education and Counseling (ADEC)
- California Association for Health Services at Home
- Connecticut Association for Healthcare at Home
- Home Care Association of Florida (HCAF)
- Home Care CEO Forum
- Indiana Association of Home & Hospice Care
- LeadingAge
- Maryland-National Capital Homecare Association
- Pennsylvania Homecare Association
- Professional Network on Aging
- Senior Care Coalition
- Society of Certified Senior Advisors
- The Association for Home and Hospice Care of North Carolina

This graph represents those providers who are part of a membership association. From a list of associations, survey participants were asked to “select all that apply.”

SURVEY PARTICIPATION BY LINES OF BUSINESS

7.9 Survey Participation by Lines of Business Provided in 2024 Report

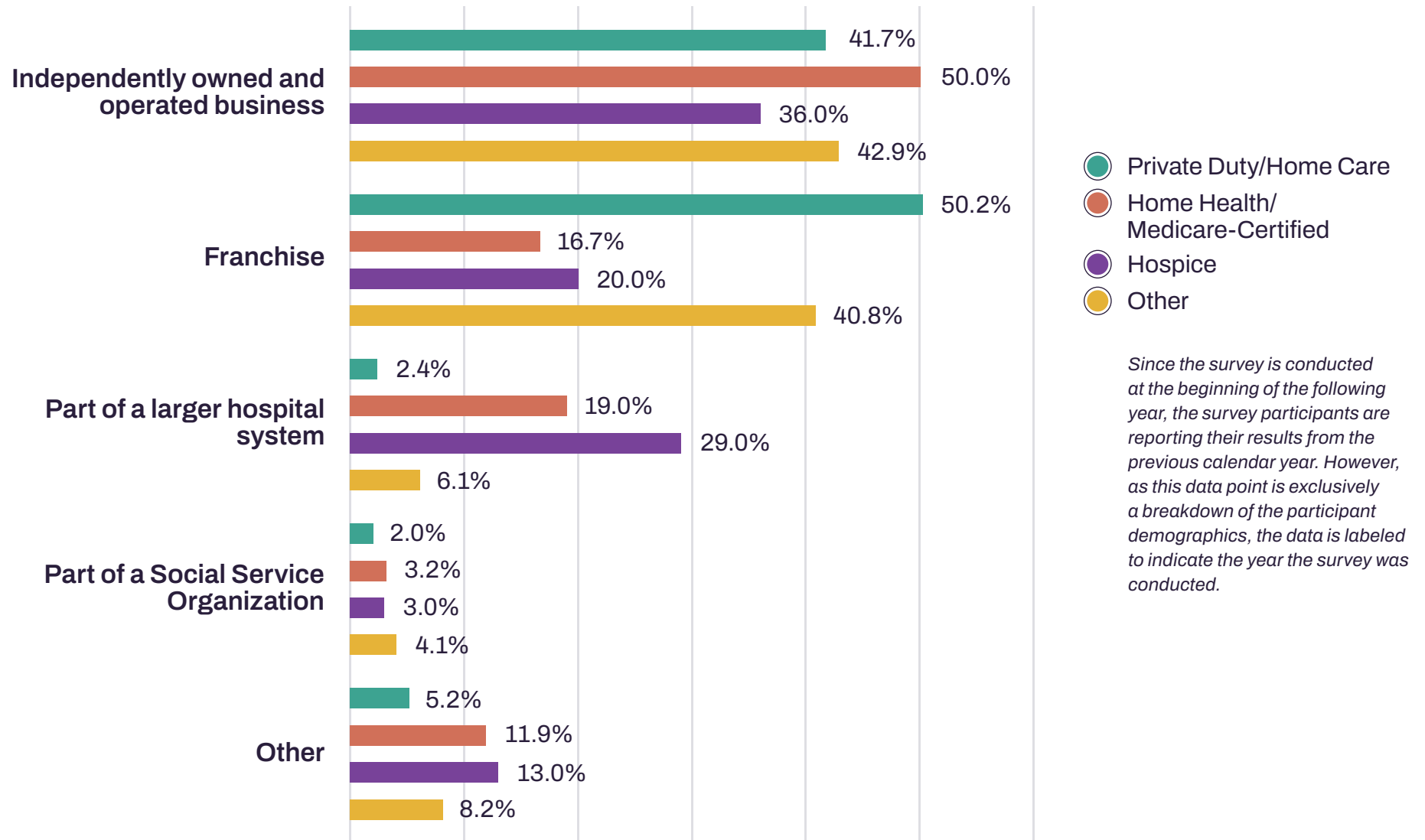


Survey participants were able to select all the business types that applied to their business. For example, an organization could provide both private duty home care and home health care.



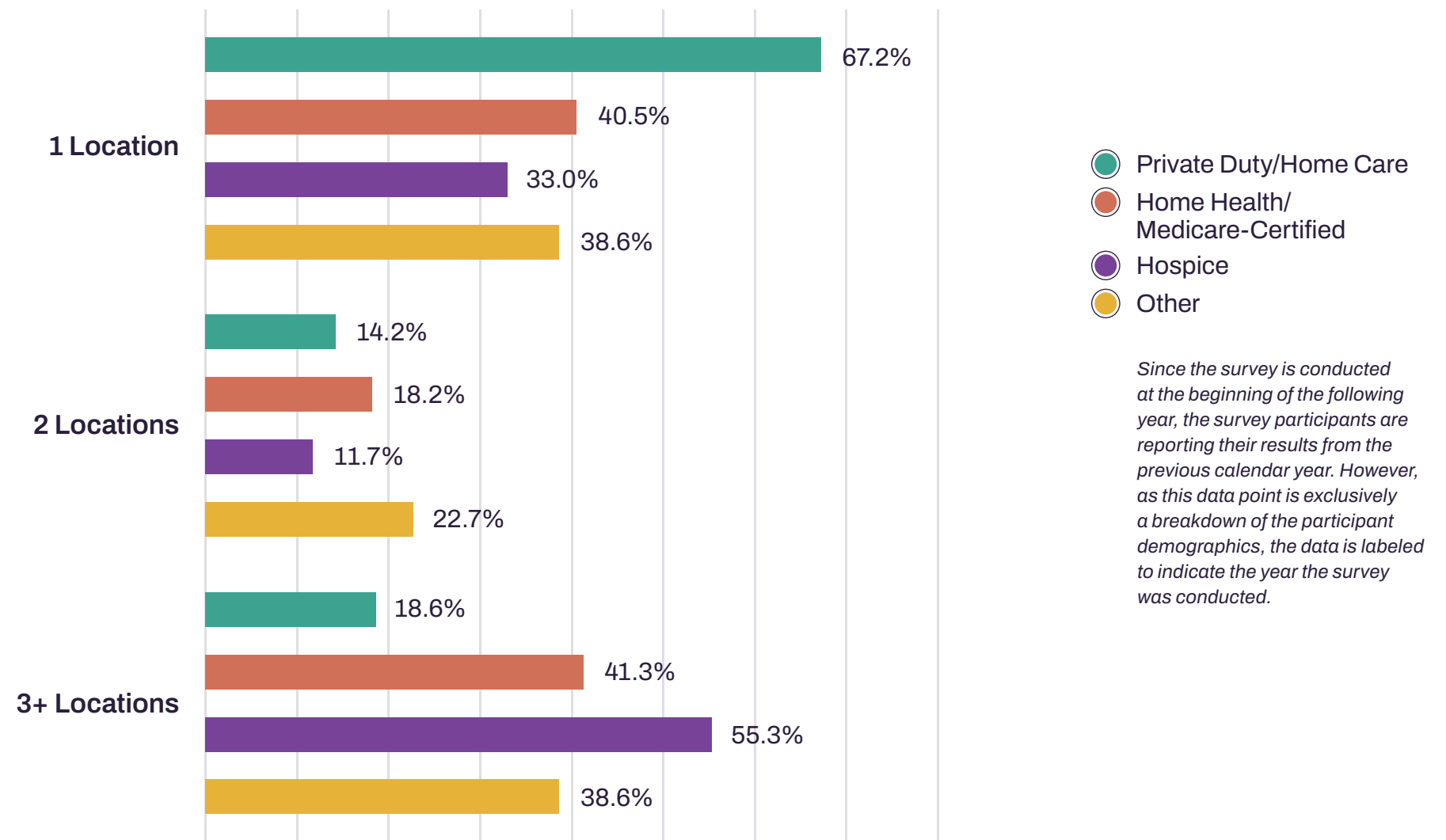
SURVEY PARTICIPATION BY LINES OF BUSINESS

7.10 Survey Participation by Lines of Business Provided in 2023 - Provider Type



SURVEY PARTICIPATION BY LINES OF BUSINESS

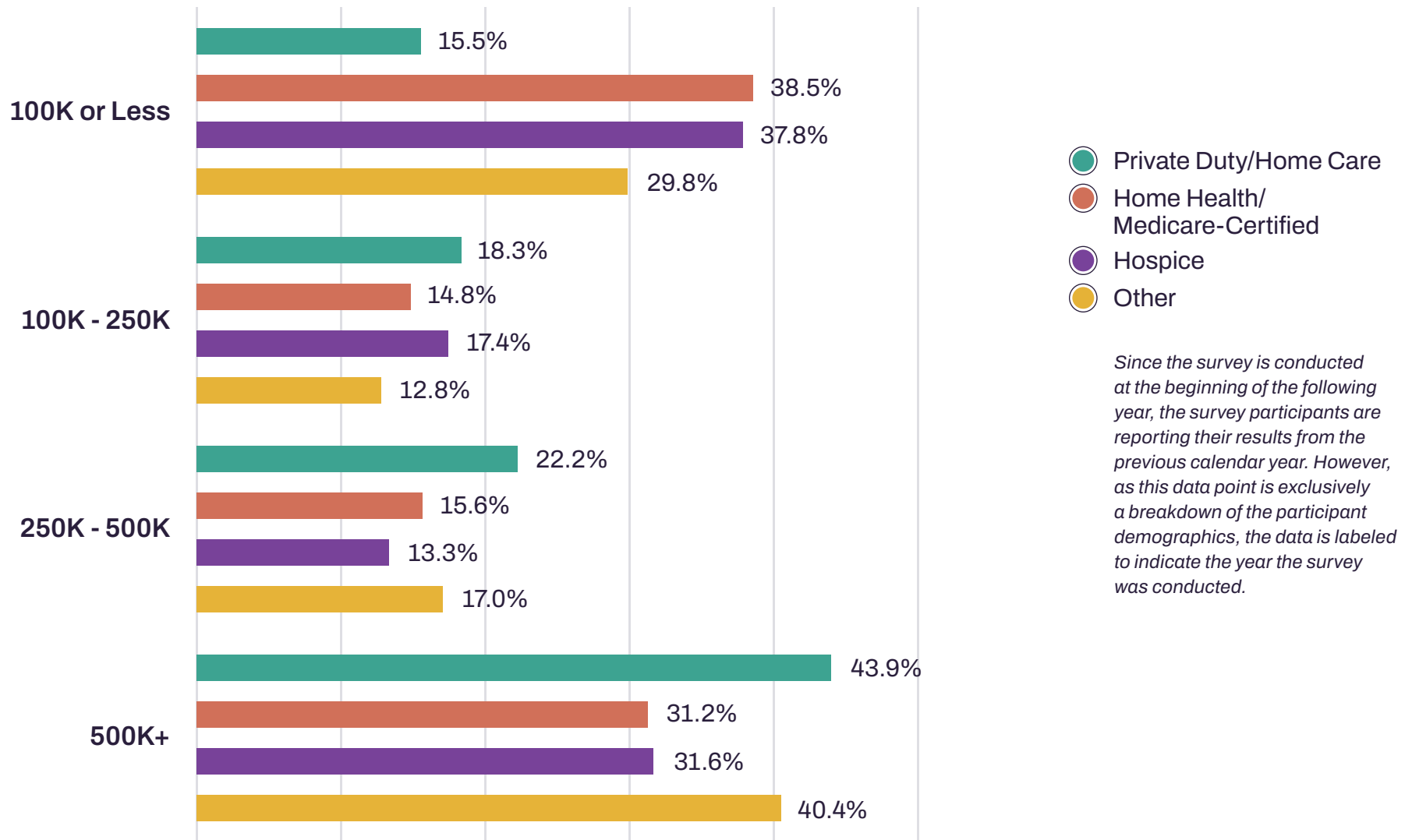
7.11 Survey Participation by Lines of Business Provided in 2023 - Number of Locations





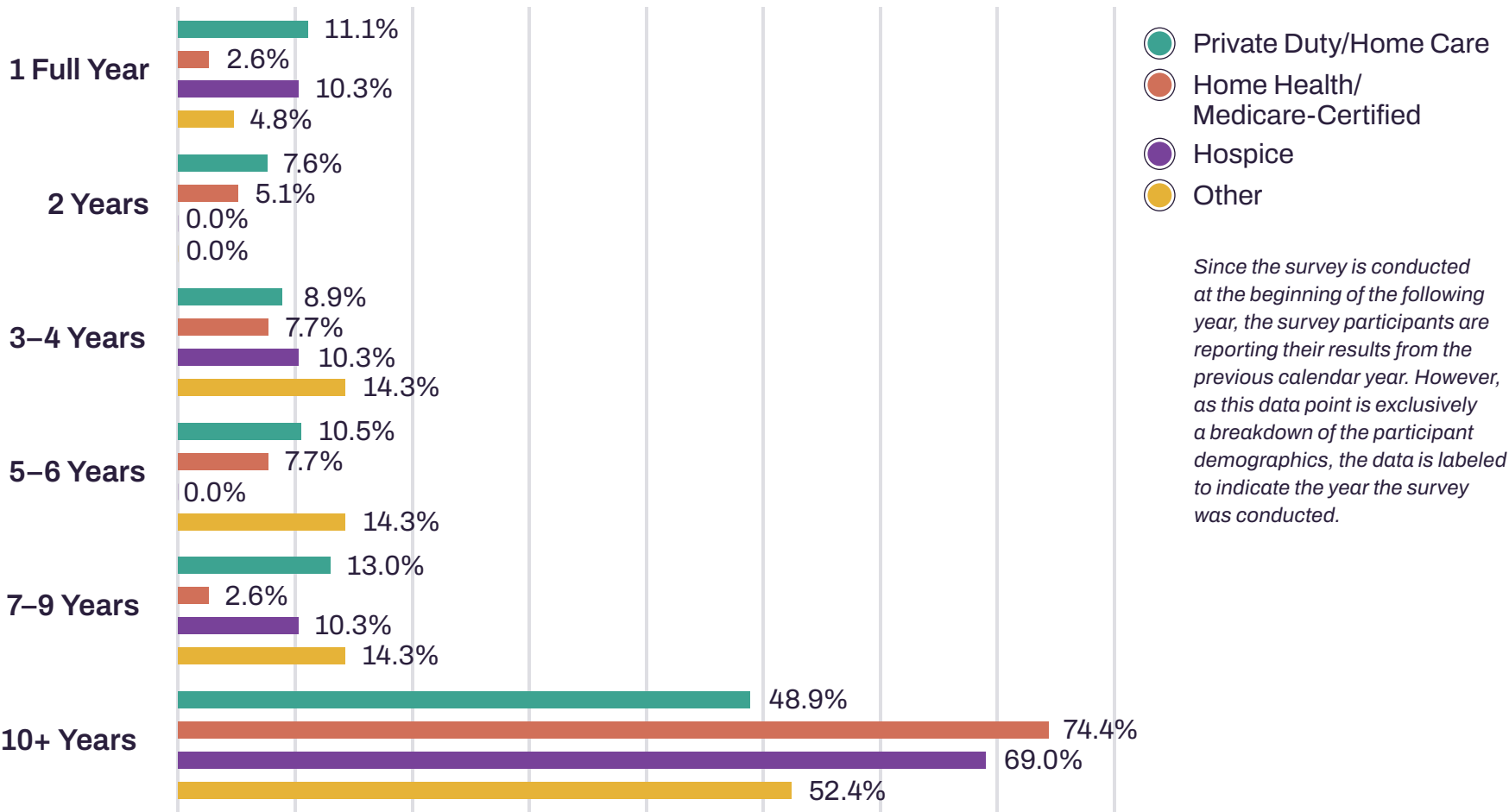
SURVEY PARTICIPATION BY LINES OF BUSINESS

7.12 Survey Participation by Lines of Business Provided in 2023 - Population Served



SURVEY PARTICIPATION BY LINES OF BUSINESS

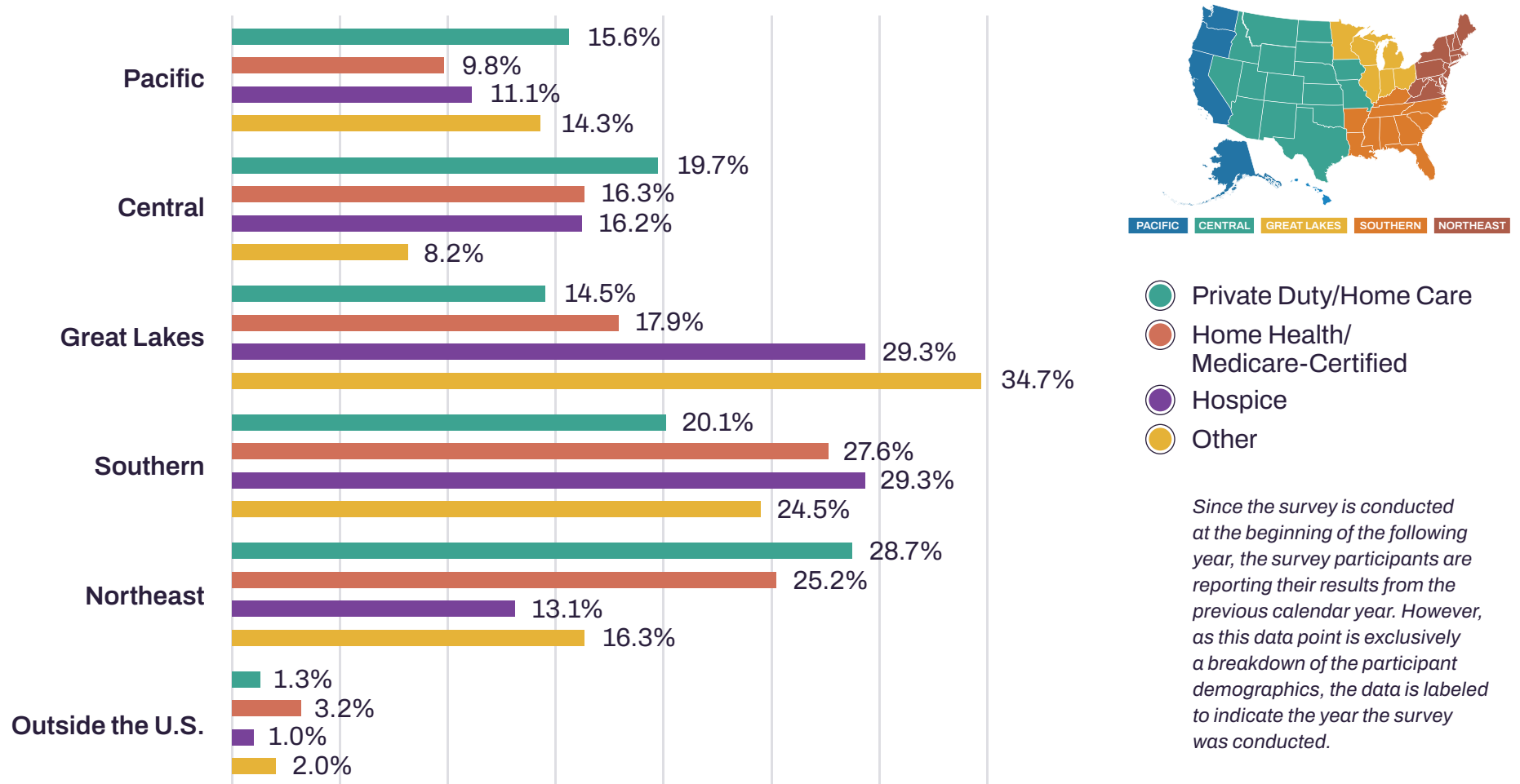
7.13 Survey Participation by Lines of Business Provided in 2023 - Years in Business





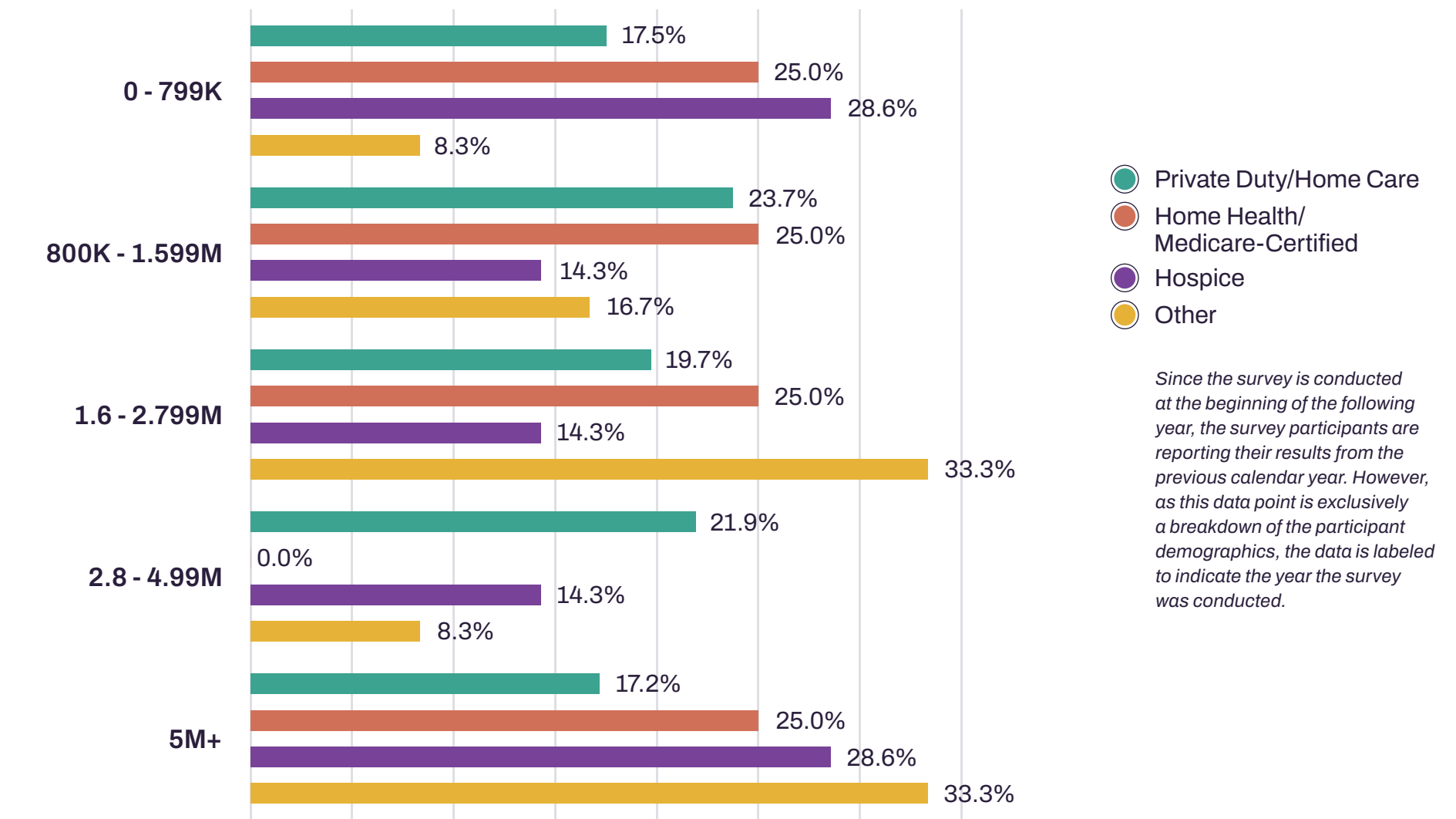
SURVEY PARTICIPATION BY LINES OF BUSINESS

7.14 Survey Participation by Lines of Business Provided in 2023 - Geographic Region



SURVEY PARTICIPATION BY LINES OF BUSINESS

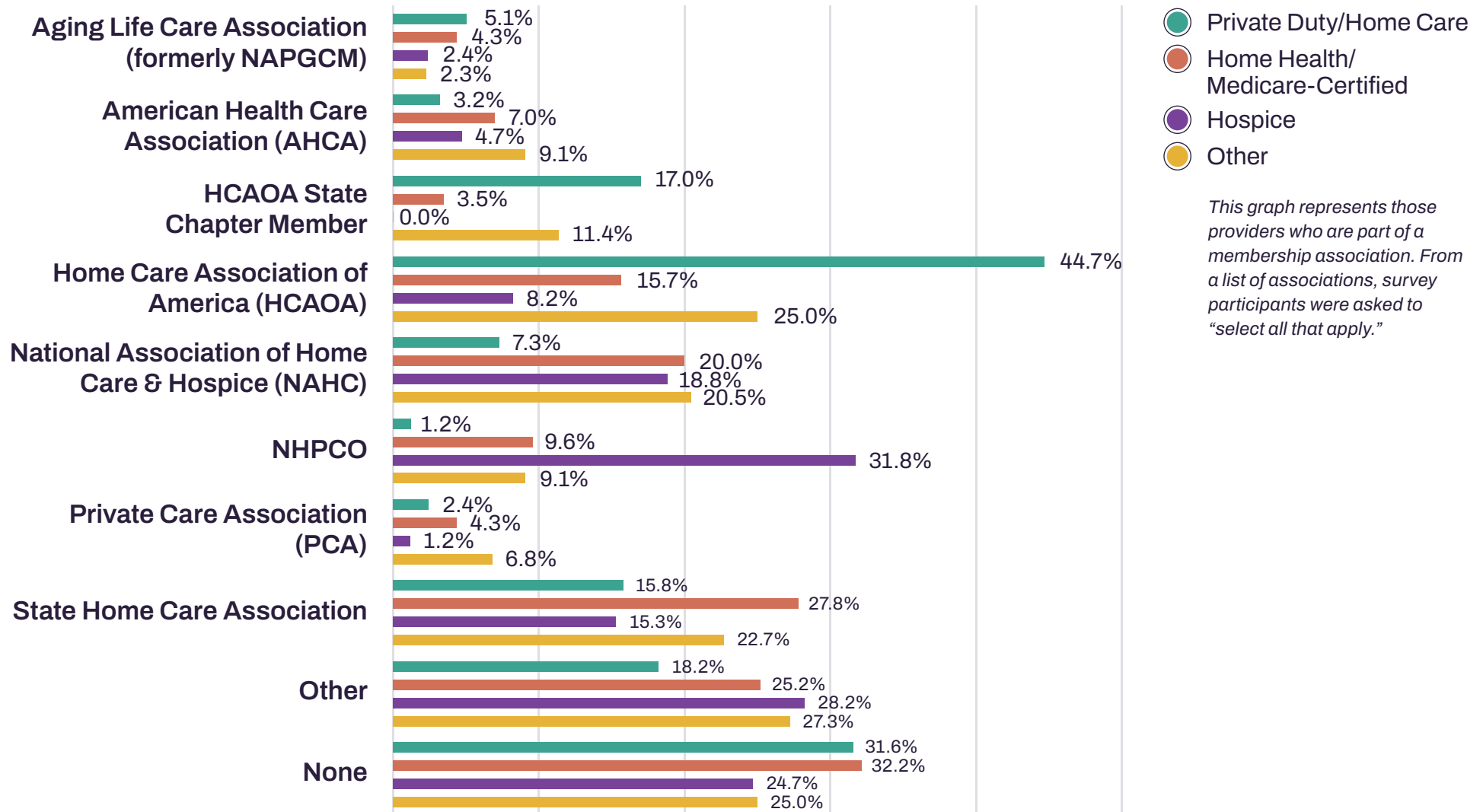
7.15 Survey Participation by Lines of Business Provided in 2023 - Revenue Range

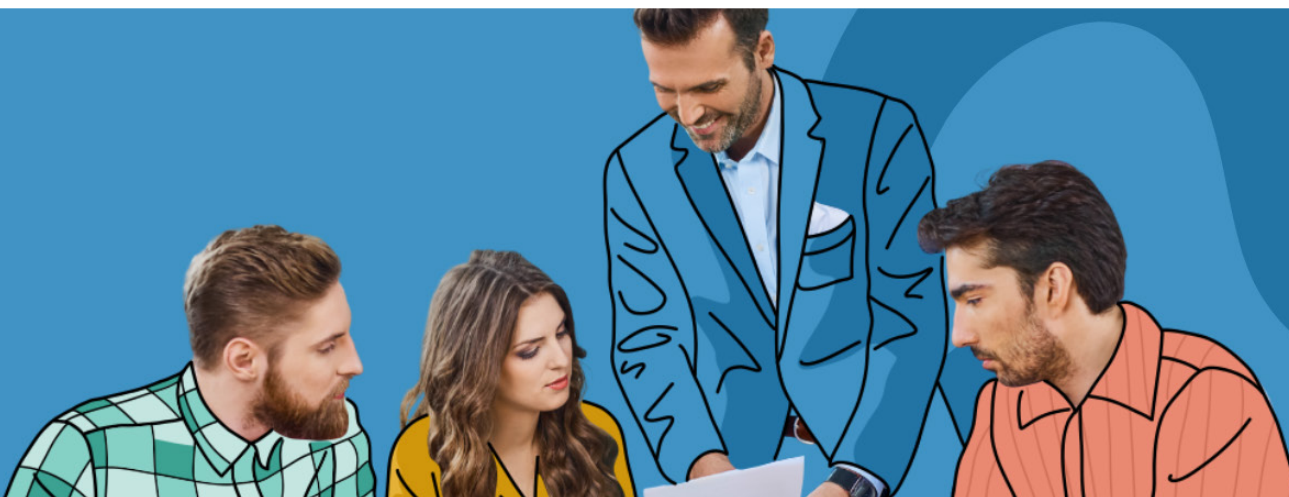




SURVEY PARTICIPATION BY LINES OF BUSINESS

7.16 Survey Participation by Lines of Business Provided in 2023 - Membership Association





Home Care Masters Survey Participation

MASTERS DEFINITION

The Masters were determined based upon the most accurately tracked criterion: annual revenue. All participating home care companies that billed more than **\$5 million in 2023** qualified and are represented here. As the industry grows, the Masters criteria adjusts to represent home care agencies in the top 25% of the industry.

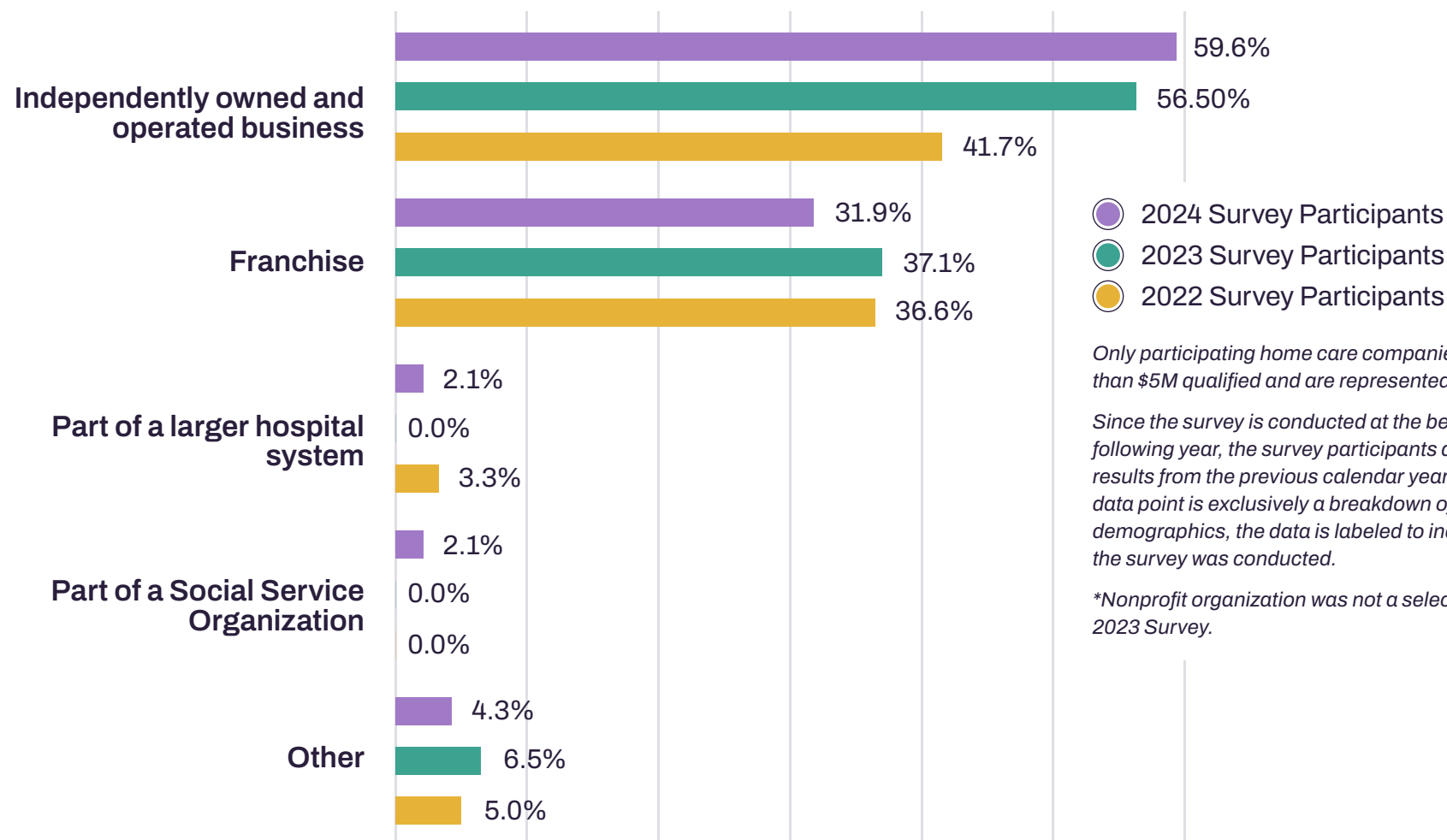
Become a Home Care Master



Grow your business with Activated Insights and become a home care master. Learn more on **page 188**.

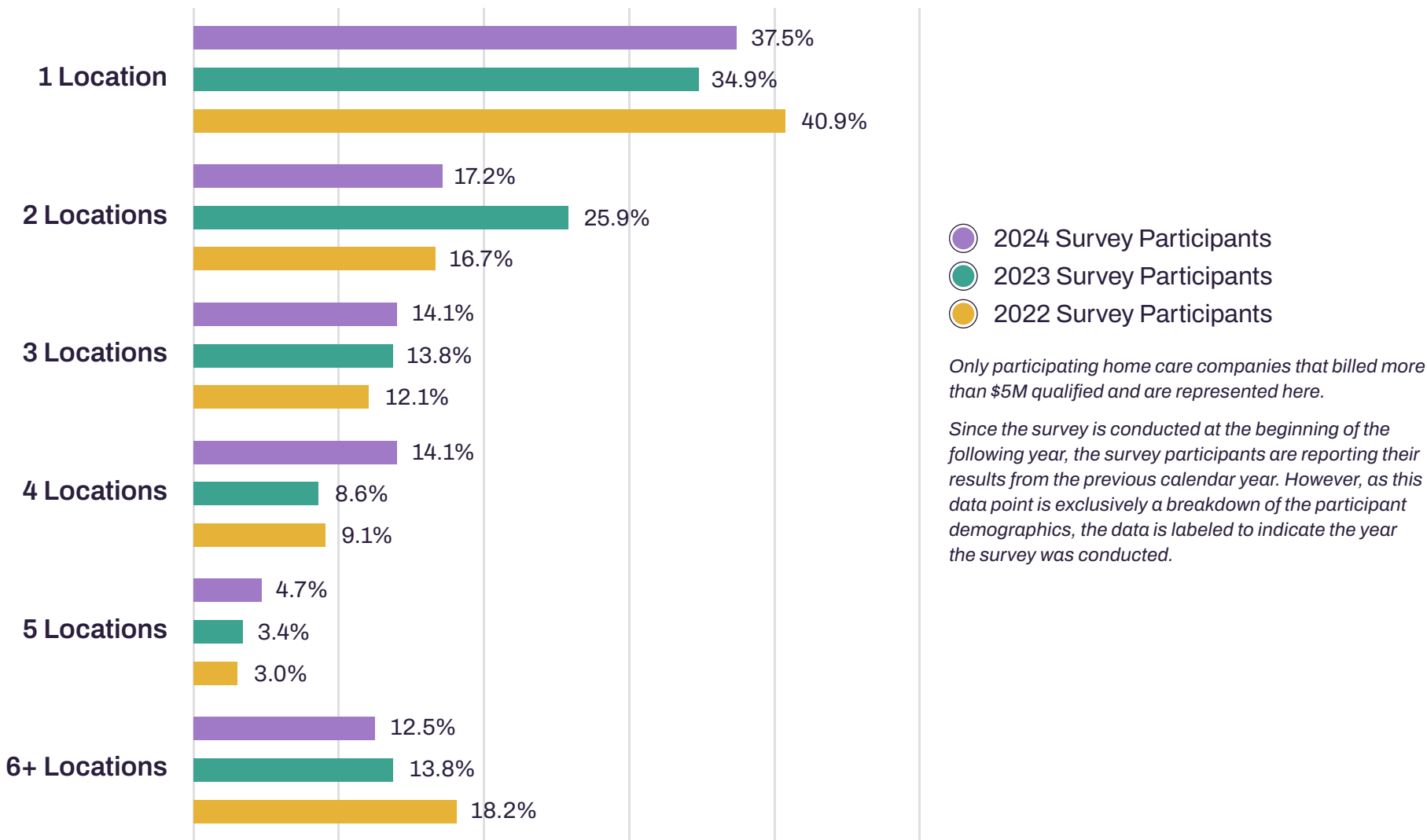


HOME CARE MASTERS SURVEY PARTICIPATION

7.17 **Home Care** Masters Participation by Provider Type for 2024 Report

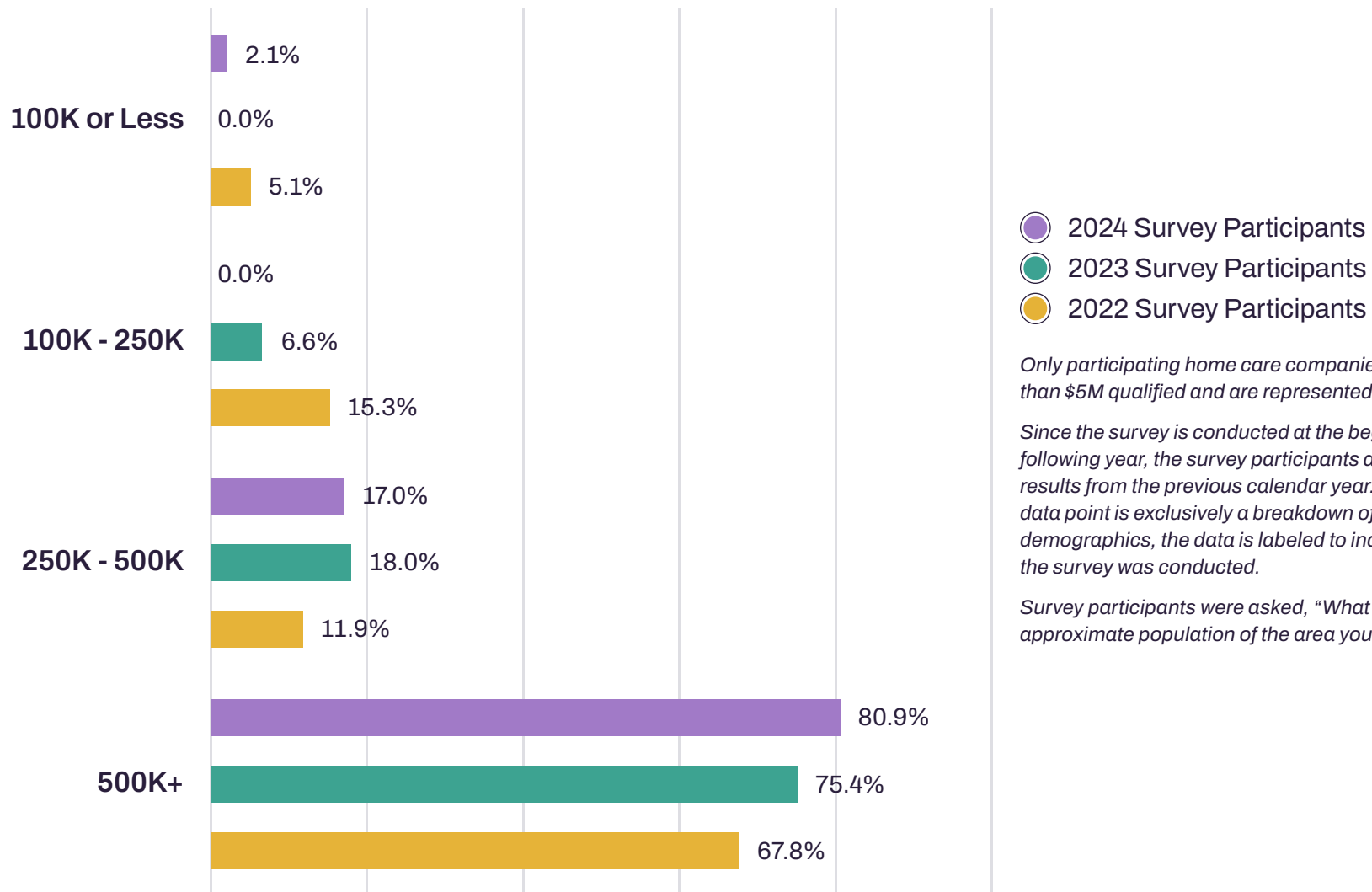
HOME CARE MASTERS SURVEY PARTICIPATION

7.18 **Home Care** Historical Masters Participation by Number of Locations





HOME CARE MASTERS SURVEY PARTICIPATION

7.19 **Home Care** Historical Masters Participation by Population Served

- 2024 Survey Participants
- 2023 Survey Participants
- 2022 Survey Participants

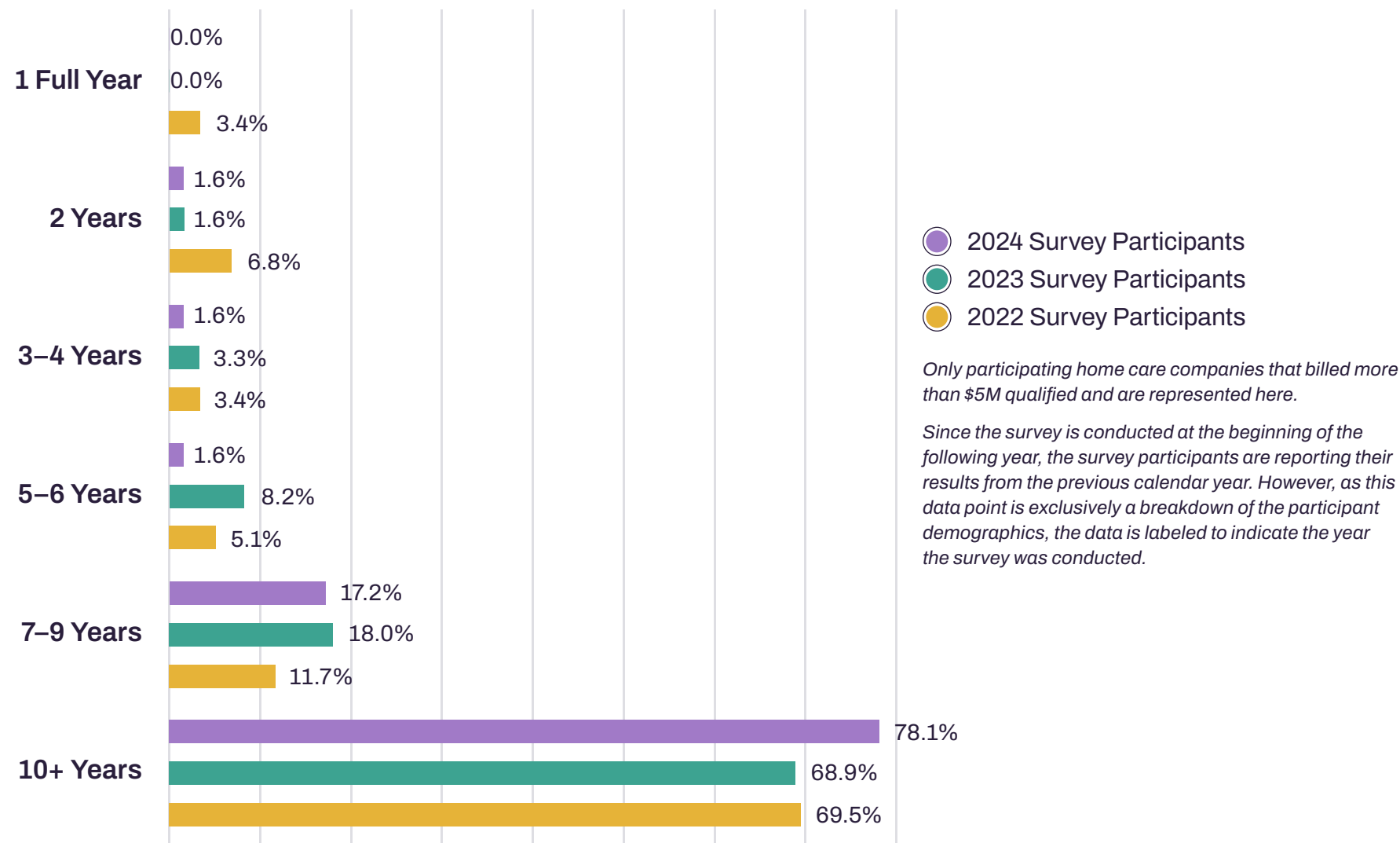
Only participating home care companies that billed more than \$5M qualified and are represented here.

Since the survey is conducted at the beginning of the following year, the survey participants are reporting their results from the previous calendar year. However, as this data point is exclusively a breakdown of the participant demographics, the data is labeled to indicate the year the survey was conducted.

Survey participants were asked, "What is the approximate population of the area you serve?"

HOME CARE MASTERS SURVEY PARTICIPATION

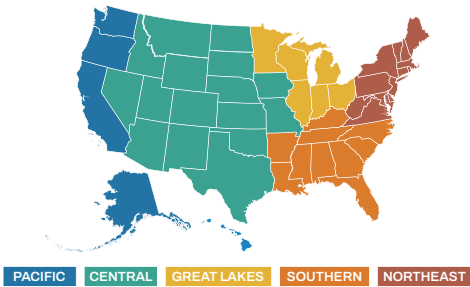
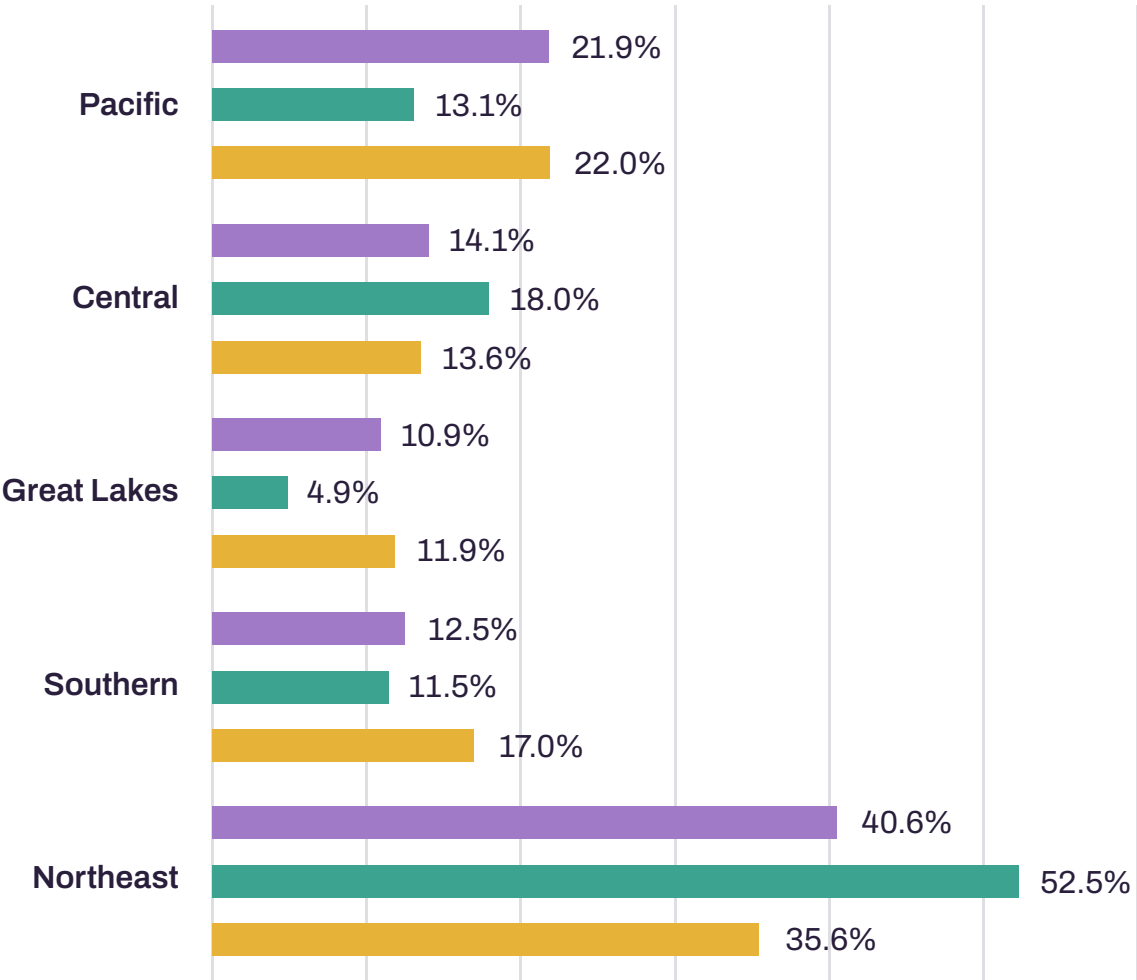
7.20 **Home Care** Historical Masters Participation by Years in Business





HOME CARE MASTERS SURVEY PARTICIPATION

7.21 **Home Care** Historical Masters Participation by Geographic Region



- 2024 Survey Participants
- 2023 Survey Participants
- 2022 Survey Participants

Only participating home care companies that billed more than \$5M qualified and are represented here.

Since the survey is conducted at the beginning of the following year, the survey participants are reporting their results from the previous calendar year. However, as this data point is exclusively a breakdown of the participant demographics, the data is labeled to indicate the year the survey was conducted.

How to Reference the 2024 Activated Insights Benchmarking Report for Home Care, Home Health, and Hospice

When referencing this document, refer to it as the *2024 Activated Insights Benchmarking Report for Home Care, Home Health, and Hospice* or the *2024 Activated Insights Benchmarking Report*. If referencing online, include a link to www.activatedinsights.com/benchmarking.

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- Courses offered in multiple languages

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turnover**

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- Reduce employee turnover in the first 100 days
- Generate actionable insights to improve employee experience
- Track and compare your scores to the national benchmarks

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- Data insights, NPS®, and eNPS® scoring with dynamic reporting
- Compare scores to industry benchmarks and trends
- Create action plans to boost engagement, culture, and satisfaction
- Mixed mode survey participant engagement

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- Eligibility for the Fortune Best Workplaces in Aging Services
- Boost visibility and market appeal with U.S. News Best Senior Living
- Improved visibility into review and SEO data with site widgets
- Analyze and act on your online reviews

Home Care Pulse is now **Activated Insights**

Experiences are at the heart of healthcare.

In long-term, post-acute care,
we believe that means everyone should make the
most of every interaction.

Caring for clients.
Interacting with families.
Onboarding and training your team.
Every moment matters.

Through workflows, benchmarks, online learning
and more, we enable your team to create high-
quality, high-empathy experiences.
And, ultimately, deliver the best possible care.

With Activated Insights, our promise is simple:
**We'll help you make the most
of every *interaction*.**



See the new
Activated Insights

