

Technology Use to Getting Clients to Say YES!

Chris Williams



What I will share today:

1. We'll identify the needs of the 7 potential clients who say 'No Not Now'
2. Apply the tools and technology to the low acuity clients so they call when they are ready for a care plan.



3 Biggest Problems Care Managers Face



Clients



Me

How Care Managers See Themselves

SOLO (0-5 yrs.)

Not sure **how to grow**

Want **more clients**

Uncertain about next steps

Operating without written plan

Give away too much for free

I do not know what I am doing

I do not know how to do the **technical stuff**

Sales has never been something that I am good at or want to do

Seasoned (6 to 15 yrs.)

Hit a **growth ceiling**

Challenging to find and

hire more staff

Outgrowing their systems

Need to improve marketing and sales

Still **working in the business**

Need **more clients to hire staff**

Do not have enough **time to grow business**

No **plan is outdated**

No direction

Have a goal or vision

I got this far how come I can't get over

Mature (16+ yrs.)

No plan for next phase

Looking for **me time**

Time for succession planning

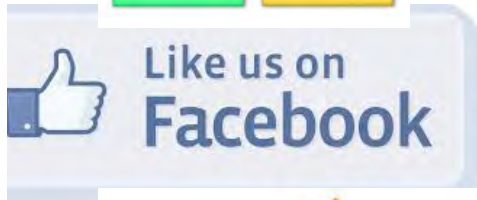
Get most of their **business from referrals; No control;**

No systems for new business

What was working before is not working now



And Everyone Tells You "You Have To Do This"



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What Are You Doing With Potential Clients – Who Say, ‘No Not Now’?



- Expecting them to call you
- Giving away too much for free
- Not following up with the low acuity clients
- Getting too busy with the crisis clients or high acuity clients
- Counting on Adult Children knowing when to call a Care Manager
- Sitting on a website that does not work
- Not tracking the low acuity clients because they do not need you – YET!
- Working without a plan

10 Prospects – 3 New Clients

What happens to the other 7?
Who say 'No Not Now'
What do they need?



What Are The Needs Of The Other



- Just wondering what's next
- Adult children not ready to see what's really going on
- Want to see how much it will cost for future planning
- Do not have the money
- Not sure if Care Management is the right choice
- The spouse is doing all the care taking
- What else?

Follow Up Is Key

- 80% of Owners do not follow up after the first interaction
- 80% of decision makers do not decide until the 5th to 12th interaction

Follow up is the key!



Follow-Up Tips

- No not now or No never
- Be creative
- Be prepared
- Review and align
- Handwritten follow-up
- Do what you say
- Follow-up often
- Ask powerful questions



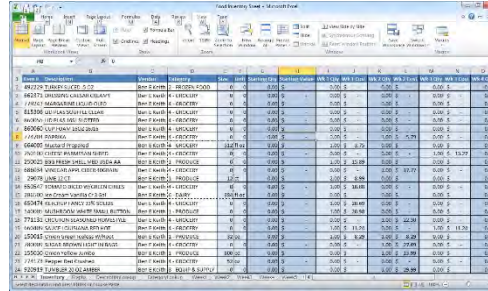
How Can Technology Increase Conversions?



Technology

Excel spreadsheet

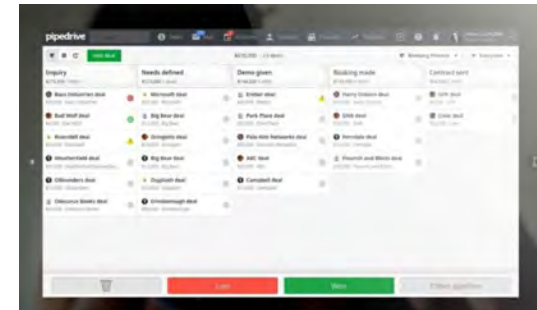
- Simple to use
- Ability to sort



The image shows a screenshot of an Excel spreadsheet with a grid of data. The columns are labeled with letters A through W. The rows contain numerical and text data, including what appears to be a list of items or transactions. The spreadsheet is displayed in a standard windowed application.

CRM

- Track referral partners
- Track next steps
- Track 7 folks who say 'No Not Now'
- Ability to sift and sort
- Send follow up letters or invites
- Increase conversions
- Make data driven decisions
- Improve productivity
- Utilize mobile solutions



Guide to Best Free CRM Software Solutions to Consider in 2019

<https://financesonline.com/best-free-crm-software-solutions-consider>



**What if you knew who
was ready to talk with
your staff?**



Who Are Your Clients?



Or these?



Understanding Acuity Levels

Low Acuity

Medium Acuity

High Acuity

Client Mix

Client Name	Start of Service Date	Living Situation	Level of Service	Utilization per wk.	Hospice
BB	12/31/12	Independent Living Community	Low	0.25	
RB	09/14/16	Memory Care Community	Medium	1.00	
KC	08/10/16	Memory Care Community	High	7.00	
RC	08/10/16	Memory Care Community	High	5.00	X
ID	02/03/11	Assisted Living Community	Medium	1.00	
MF	01/25/17	Private Home	Low	0.25	

Know Your Numbers

January	\$36,917.30
February	\$39,653.14
March	\$33,056.15
April	\$49,971.04
May	\$35,126.39
June	\$36,354.59
July	\$46,537.25
August	\$36,716.79
September	\$46,716.94
October	\$50,116.62
November	\$48,800.00
December	\$40,116.62
YTD Total	\$500,082.83



Bonus

Referral Marketing Webinar

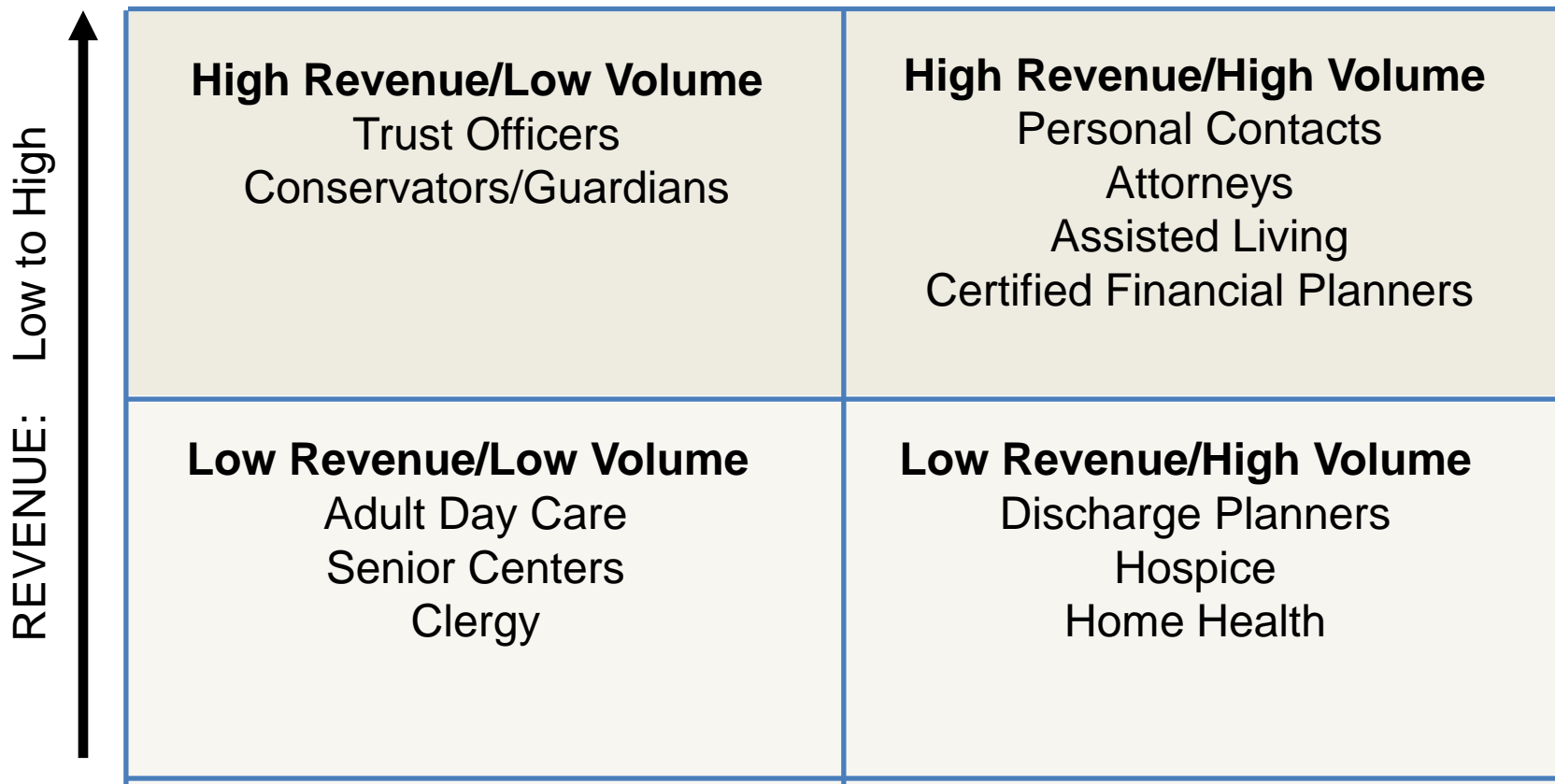




STOP! telling yourself

I am begging for referrals . . .

Focus your efforts



VOLUME: Low to High



Steve Barlam, LivCare



Imagine Instead

I help my Professional Service providers become *more valuable* to their clients – by *being a resource* to the aging life care community, I *make it easy* for them to recommend a local Care Manager, one who is *easy to work* with, *cares* about the aging life community, and can *solve their clients and their families headaches, worries and time.*



How To Start



**Sign up for FREE
referral webinar**



**Get a FREE 30 minute
Business Strategy Session
with Chris**

THANK YOU!

Care Managers!

