

CHAP

Growth Accelerator: **Driving Profitability in** **Home Care**

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Denise Stanford

- 15 years experience in community-based healthcare
- Specializing in building programs, creating education, and engaging the workforce
- Experience in operations, staffing, and revenue management
- Passionate about operations, clinical and growth being one voice, working toward the same outcome
- Collaborative leadership approach with emphasis on a connective culture
- Believes deeply that work should be FUN!

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Learning
Solutions

About CHAP

Community Health Accreditation Partner (CHAP) is an independent, non-profit, accrediting body for home and community-based healthcare organizations.

Learning Solutions provides practical training and industry-recognized certifications that equip teams to lead and operate with confidence.

Growth Solutions consultatively transforms the complexity of the industry into opportunities for growth.



Objectives of This Training



**Review Common
Barriers to Growth**



**Outline your Formula
to Grow your Agency**



**Create a Plan for
Implementation and
Execution**



In one word, what's slowing your growth?

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Waiting for participants



Which barrier is hurting your agency most?

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Operational Efficiency Culture & Engagement Market Intelligence Leadership & Direction Talent Management Strategic Planning

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Waiting for participants

Overcoming Barriers at the Agency level

Complete a SWOT Analysis – Strengths, Weaknesses, Opportunities, Threats



Research your competition

- Google
- Social Media
- CMS.gov
- MCR Claims Data
- Local Market Intel
- Publications



Overcome your Weaknesses

How can your agency improve?

- Quality
- Care
- Customer Service
- Differentiation

What is holding you back?

- People
- Processes
- Tools
- Leadership

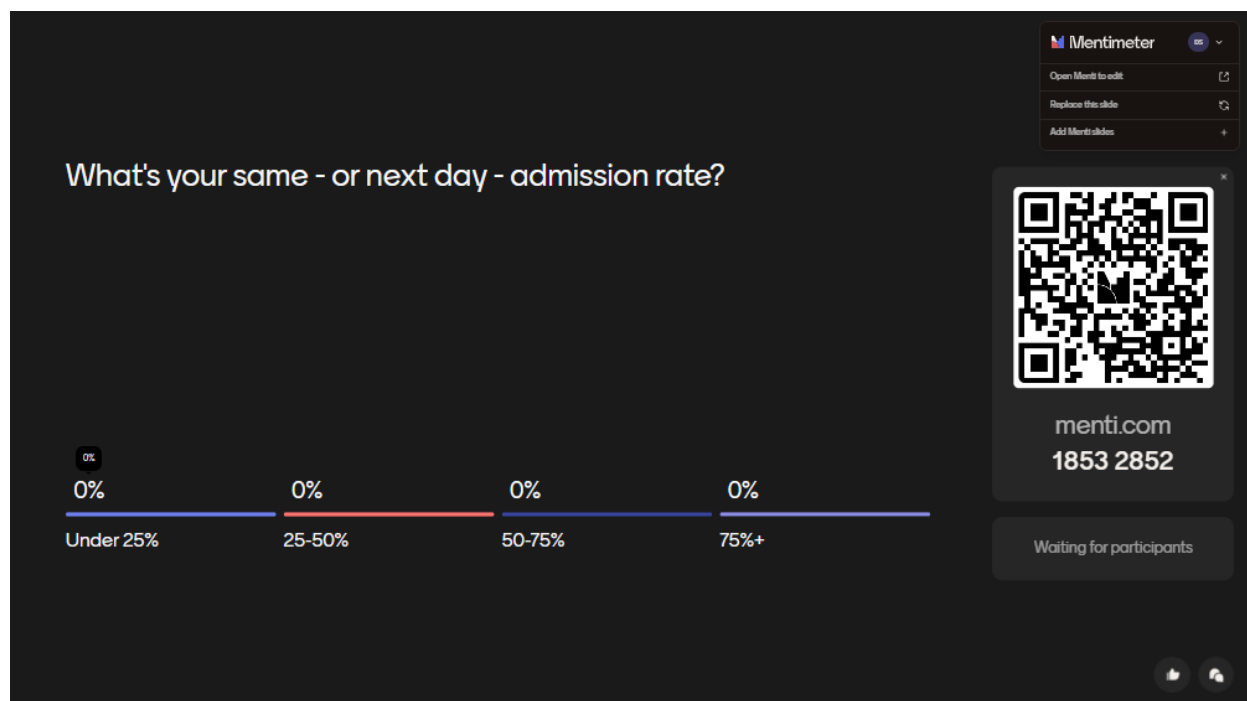


Know your Strengths

Unique characteristics of the agency that separate you from the competition. Every member of your team should know these.

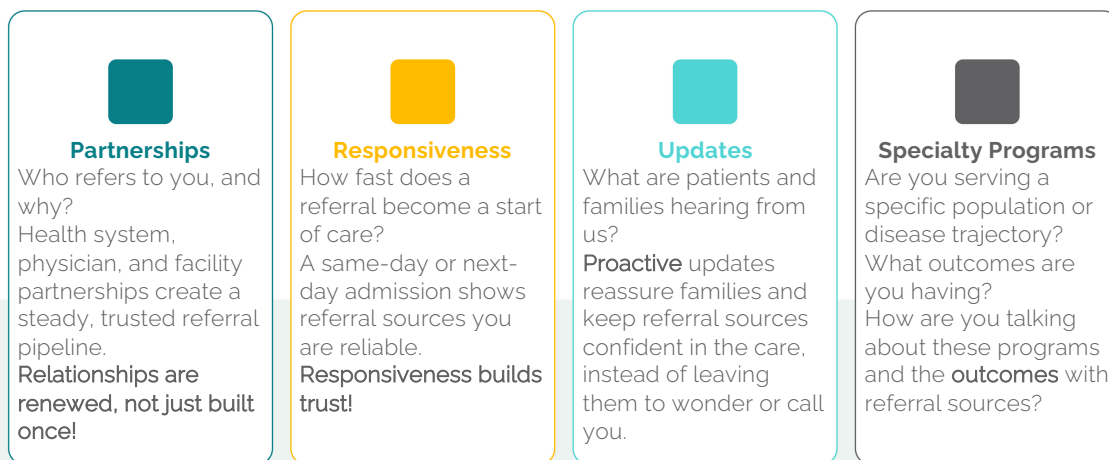
- STAR Rating
- Specialty Programs
- Partnerships

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Differentiators in Action



Specialty & Clinical Care Programs

Specialty programs let your agency say yes to referrals competitors turn away – and every team member should be able to name yours.

Chronic Care Programs

- Heart Failure / Cardiac Care
- COPD & Pulmonary Care
- Stroke Recovery
- Diabetes
- Wound Care
- Dementia Care
- Age-Friendly Care

Why It Wins Referrals

Why they help you win:

- Fewer hospital readmissions
- Confidence in complex cases
- Stronger payer contracts

What it takes to launch one:

- Specialized clinical training
- Defined care protocols
- Referral source marketing

Veteran Care

How do you serve and partner with these referral sources:

- Veteran Partnership Programs
- Community Veteran Outreach

Staff Engagement Drives Differentiation

Why It Matters

Engagement is a differentiator patients and referral sources can feel:

- Turnover disrupts continuity of care and referral relationships
- Engaged clinicians deliver more consistent care
- Families and physicians notice when a care team is stable
- A connective culture is a competitive advantage

How To Build It

- **Career Ladders & Mentorship** – clinical buddy programs and a visible path to grow
- **Manageable Caseloads** – realistic productivity expectations that protect quality
- **Recognition & Rounding** – regular leadership check-ins and feedback loops, not just an annual review
- **Training Tied to Your Programs** – invest in the specialty skills that make your agency the referral

Patient & Family Experience

What They Notice

The moments that shape whether a family trusts your agency:

- A smooth, fast admission with no surprises
- A 24/7 clinical access line that actually answers
- Proactive updates, instead of having to call and ask
- Being treated like a person, not a case number



How Agencies Deliver It

Patient Portals & Care Apps – real-time visibility into the plan of care

Caregiver Education & Respite – resources that support the family, not just the patient

Bereavement & Spiritual Care – continuity of support that lasts well after the patient passes

Service Recovery Plans – a clear, fast way to make things right when something goes wrong

Six Pillars of Differentiation



Mission-Driven Care



Care Made Easy



Engaged Teams



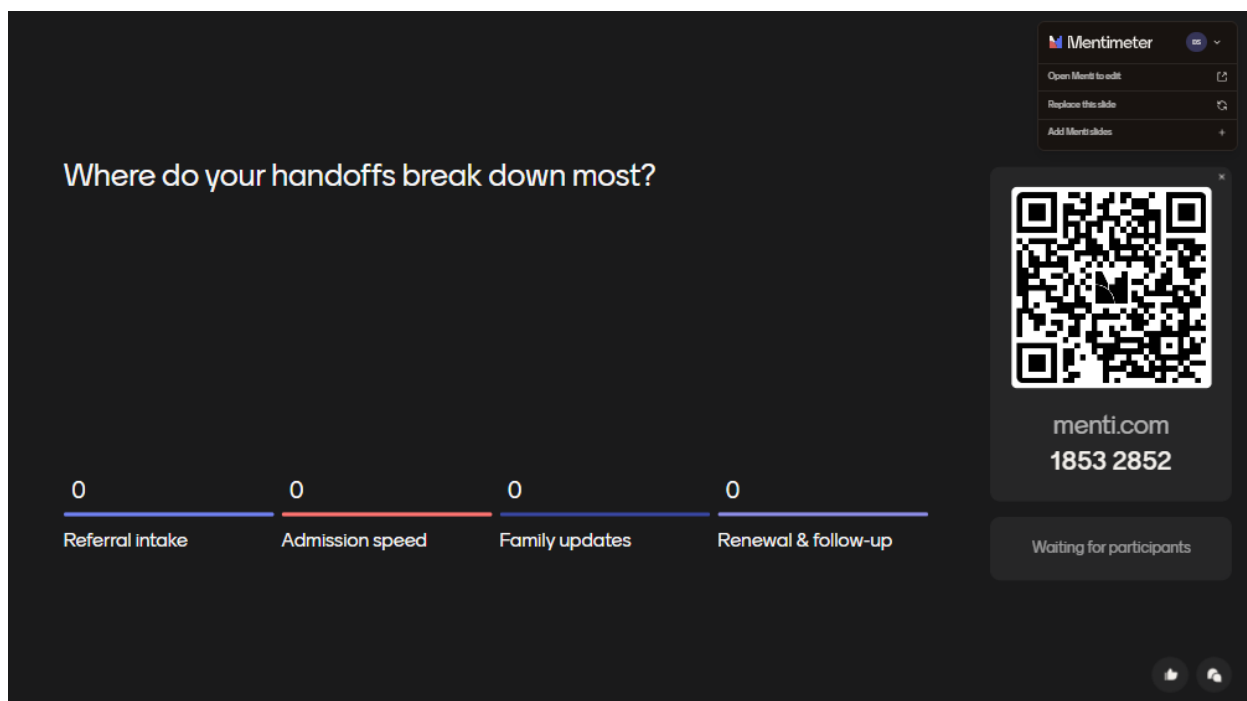
Specialty Programs



Clear Positioning



Quality Outcomes



WHY IT MATTERS

Silos Quietly Cost You Growth

Working in silos

Three teams, three agendas

- Referrals stall waiting on a bed or a callback
- Families are left to wonder — and call you
- Turnover breaks continuity and relationships
- Sales promises what clinical can't staff

Moving as one

One team, one outcome

- Same-day admissions referral sources count on
- Proactive updates before families have to ask
- Stable teams patients and physicians recognize
- One message the whole agency can deliver

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STRATEGIES FOR GROWTH & PROFITABILITY

THE THREE FUNCTIONS

Every Function Owns a Piece of Growth



Clinical

Delivers the care that earns the referral

- Specialty & chronic-care programs
- Engaged clinicians, low turnover
- Quality outcomes — STAR & CAHPS



Operational

Makes it easy to say yes

- Same- & next-day admissions
- Manageable caseloads that protect quality
- Weekly scoreboard & accountability



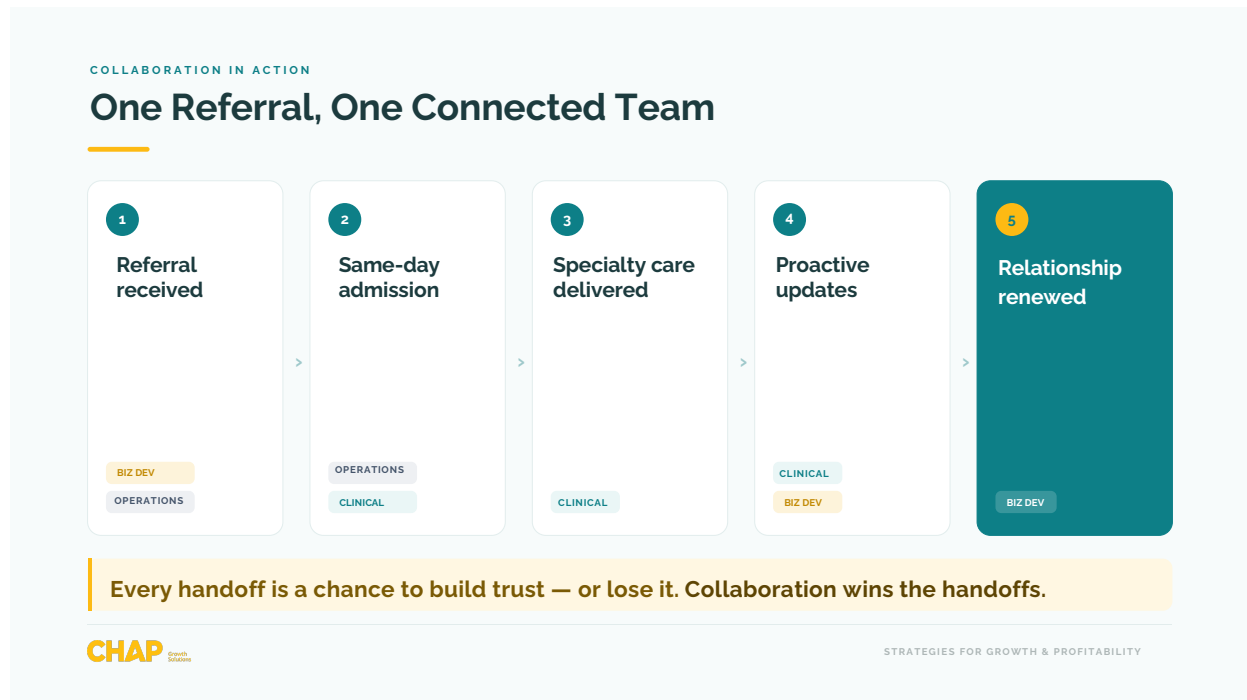
Business Development

Carries the story to the market

- Trusted referral relationships
- Consultative, needs-based messaging
- Market & MCR claims intelligence

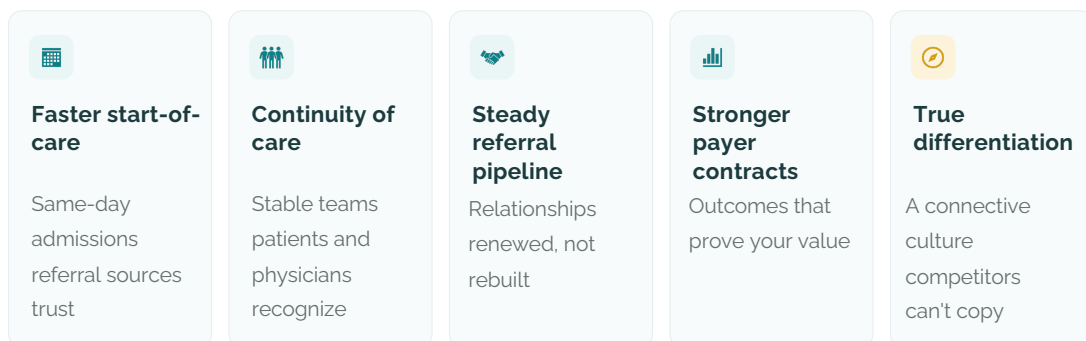
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STRATEGIES FOR GROWTH & PROFITABILITY



THE PAYOFF

What Collaboration Returns to the Business



When clinical, operational, and business development speak as one voice, **growth follows.**

Overcoming Barriers at the Agency Level

Create a culture of Growth

Focus and Measure the Right Activities

- LEAD Measures vs LAG Measures

Make your organizational goals visible to everyone

- Does everyone know your Census and Admission goal?
- Do you have a Daily or Weekly Scoreboard?
- Does everyone on the team understand their role in agency growth?

Managing vs Coaching

- Are you a Manager or a Coach?



Instilling a Growth Mindset vs Fixed Mindset

- "I Can If" vs "I Can't Because"
- Self-Coaching

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Reach + Frequency + Messaging

Formula for Growth

Three Lead Measures for Growth

To increase referrals, focus on three things: maximizing sales call volume, building customer relationships, and crafting compelling messages that offer solutions to client needs.

Reach



How many Sales Calls are being made each day?

The more calls made the greater opportunity there is for referrals.

It is a numbers game!

Frequency



How Often are we calling on Accounts?

Oftentimes sales reps are not going to accounts with the right frequency.

What is that magic number?

Messaging



What is our message to accounts?

A consultative sales approach that is focused on identifying customer needs and offering a solution to a problem they have.



REACH = Total Sales Calls

Average goals:

- 10-15 per day
- 50-75 per week

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Define

What is a sales call? Meaningful conversation with a contact that can influence a referral to home health or hospice.

Accountability + Routing

Routing at the beginning of the week that maps out a plan of where reps will be going and who they will be talking to.

Creates intention: "This is where I will spend my time and as a result, my goal is to achieve 5 new referrals this week".

Report out at end of the week.

Documentation

CRM/logging sales calls: Tracking this data will provide reports that can be used in strategic business planning and coaching sessions.

Data

- List of all accounts called
 - Number of sales calls for the month
 - Number of referrals for the month
 - Number of admits for the month
- List of accounts with no calls – accounts with no visits, assess why.
- List of accounts that are down MoM in admission volume and why.

Frequency / Territory Management

If you have a grading system for an account – you may set up a frequency this way:

- "A" Account – 2-3x/week frequency
- "B" Account – 1-2x/week frequency
- "C" Account – Bi-weekly frequency
- "D" Accounts – 1x/month frequency

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Territory Optimization

Right Number of Accounts – too many or too few?

- 40 – 60 accounts is ideal, with a focus on a **top 10-15**

Use claims data to identify high-value accounts

- High volume referrals to HH/HSP
- Refer to more than 1 agency
- Important to ensure that your salesperson's time is spent in the right places, where the opportunities are. "Fishing where the fish are"

Mapping Tools – ensure the territories make sense geographically and avoid crossover

Before Territory Mapping



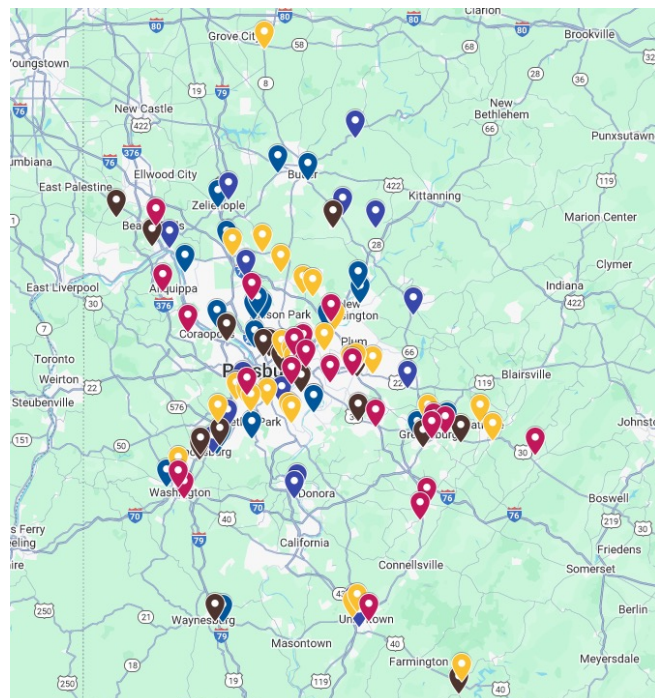
Each Color Pin = Sales Rep

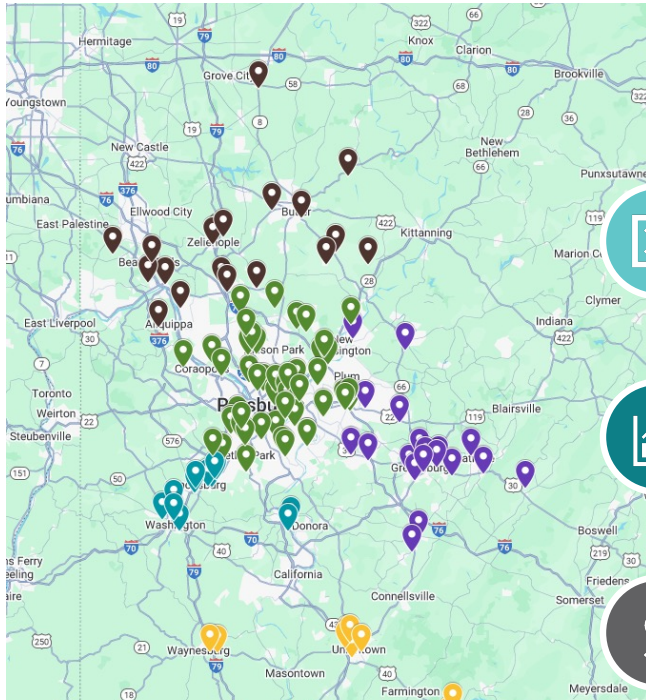


Note the Overlapping



Note the Non-Covered Areas





After Territory Mapping

No Crossover

More Manageable + More Productive

More Cost Efficient



Messaging

What your customers are hearing

- Do your homework. Pre-call planning with prepared message, value proposition, and possible objections.
- Follow a Consultative Sales Process focusing on relationship building and open-ended discovery questions geared toward the customer's goals.
- Have a system of accountability with monthly or quarterly field coaching rides by a sales leader to assess messaging.



Underperforming Team Members

What is the root cause of underperformance?

Go back to the three lead measures

- Are they making the right number of sales calls?
- Is their territory optimized, with good territory management?

If the answer is yes, then it can be safe to say that the root cause is messaging.

Messaging is a very common lead measure that is lacking in underperformers

- Did they get the proper onboarding/training to understand their product?
- Did they get formal sales training and follow a consultative sales process?
- Do they get routine field rides and coaching calls from a sales leader/coach?

Tools

Track success with lead/lag measures
Use pre-call planning
Manage territory
Perform regular SWOT analysis
Identifying/build differentiators
Institute Clinical/Ops/BD regular meetings
Use staff engagement tactics



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Thank You

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