



**Pipeline
Ignition:
Client
Acquisition
Strategies
That Work**

Strong client acquisition depends on intentional relationship-building and effective consultation practices. This session explores how agencies can convert inquiries into long-term clients through structured, strategic referral networks, and professional partnerships.

Participants will learn how to cultivate relationships with elder law attorneys, financial professionals, care managers and trust officers to fuel sustained business growth.

Learning Objectives

CLIENT ACQUISITION

Key steps in a consultation and intake process that convert inquiries and marketing efforts into clients

BUILD

Intentional relationships with elder law attorneys, trust officers, care managers and others

USE

Effective Consultation Practices
Communication strategies that build trust with families and referral sources

TURN

One-time clients into long-term relationships and referral sources

CLIENT ACQUISITION

Key steps in a consultation and intake process that convert inquiries and marketing efforts into clients

What Makes You Different?

✕ Change Approach

✓ Start Showing



"We provide great care."
"Our caregivers are the best."
Generic marketing language referral
sources hear from every agency

"Here is the data that proves it."

- 94% client/caregiver satisfaction
- Start time within 24 hours
- 0 serious falls
- 86% caregiver consistency
- 4% rehospitalization rate

The Traditional Referral Approach

Most agencies use the same tactics — and referral sources can't tell them apart



Brochures

Generic — filed or discarded



Drop-ins with Donuts

Memorable but not meaningful



Relationship Lunches

Builds rapport, not referrals



Generic Messaging

"We provide great care" — so does everyone

40-60 hours/wk –highest margin profitability

Average Length of Stay 6-18 months vs 2-6 weeks

Calculate Revenue per client

Fewer Caregivers-lower operational complexity

Higher Satisfaction-lower turnover

Know the Ideal Clients

Courtesy of Stephen Tweed, Leading Home Care

The Hidden Robbers of Revenue!

Courtesy of Stephen Tweed, Leading Home Care

Short-hour clients (≤10 hrs/week)

Intermittent Schedules

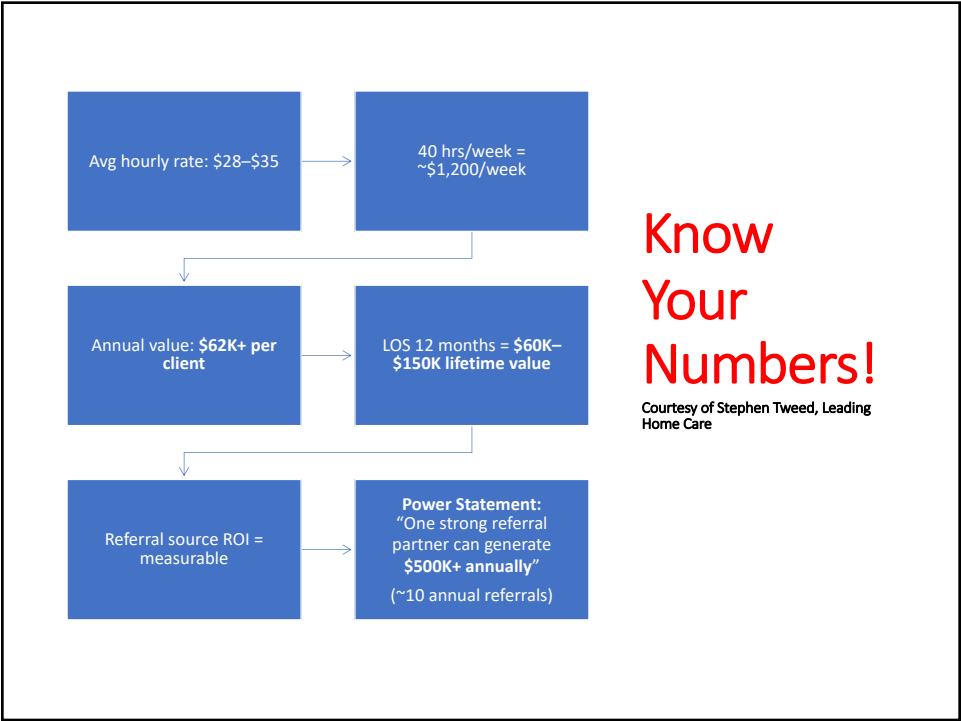
High caregiver turnover cases

Low LOS (<30 days)

High admin time / low margin ratio

Up to **60% more admin cost per dollar earned** on low-hour cases





Build

referral relationships with elder law attorneys, wealth advisors, care managers, discharge planners, trust officers and others.

What are
Their Top
3 Pain
Points?

Stephen Tweed,
Leading Home Care

Hospital
readmission rates
↓

Response time < 2
hours

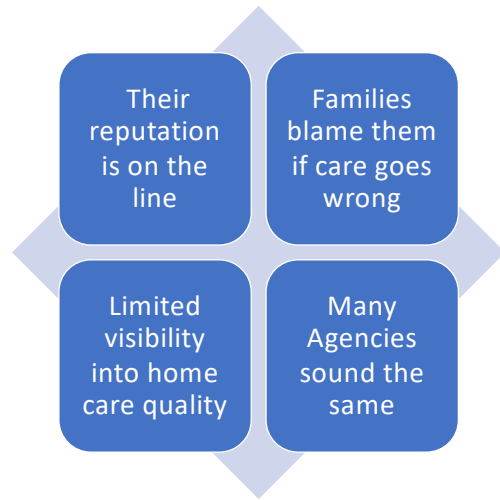
Caregiver reliability
> 95%

Fill rate speed

Client satisfaction

“Referral partners
don’t refer
agencies—they
refer **outcomes.**”

Why Referral Sources Are Hesitant



Why Relationships Drive Growth

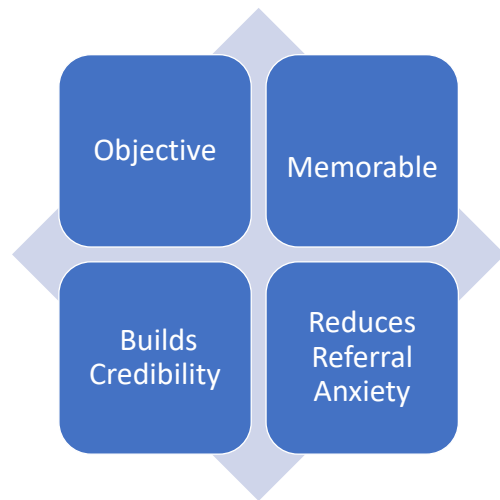
Most care management clients come from trusted referrals

Families seek guidance from professionals they already trust

Strong relationships create consistent and qualified leads

Long-term relationships create sustainable growth

What Makes Data Powerful



Key Response Time

How quickly can you start care after a referral or call out?

- After hours?
- Weekends?
- Call outs
- Other HHA no shows?
- Are you ready to staff?
- Back up staff assigned?

Build Trust

- Consistency/Response Time

- Communication/Coordination of Care

- Outcomes reporting

- Trust

Geriatric Care Managers / Care Managers

- A Match Made in Heaven
- Partner with RN and MSW care managers
- Share outcomes data and response times
- Co-manage complex clients

Physician Offices

- Medication Reminders
- Appointment Transportation
- Family Communication
- Post-visit follow-up coordination

Medicare Home Health Agencies/Hospices

- Accept their discharges — fast start of care
- Provide continuity after Medicare benefits end
- Communicate and coordinate proactively with care teams

Hospital Discharge Planners

- Fast start of care
- Rehospitalization prevention
- Consistent communication
- After-hours and weekend availability

Hospital Social Workers

- Family Support and Counseling Navigation
- Emotional Reassurance for families
- Reliable Home Care Transitions
- Clear communication on care plans

Skilled Nursing Assisted Living Facilities

- Reliable, consistent caregivers
- Communication and coordination with staff
- Smooth Transitions after discharge/ Prevent readmissions to hospitals



Senior and Aging Organizations



SOCIAL
ENGAGEMENT
SUPPORT



FALL PREVENTION
PROGRAMS



INDEPENDENCE AT
HOME



TRANSPORTATION
AND ERRANDS

Elder Law Attorneys

- Long-term care planning support
- Family communication and coordination
- Crisis Intervention



Trust Officers & Financial Advisors

- Responsible use of client resources
- Reliable long-term care planning
- Regular reporting and billing clarity
- Serving high-net-worth clients

Use

Communication and coordination strategies that build trust with families and referral sources.

Funeral Homes

- Natural next step after home care ends
- Refer families navigating final stages
- Build goodwill with pre-planning referrals
- Compassionate coordination during transitions

Decision Makers

Courtesy of Stephen Tweed,
Leading Home Care

Oldest Adult daughters (60%+ decision makers)

Professional women (45–65 age range)

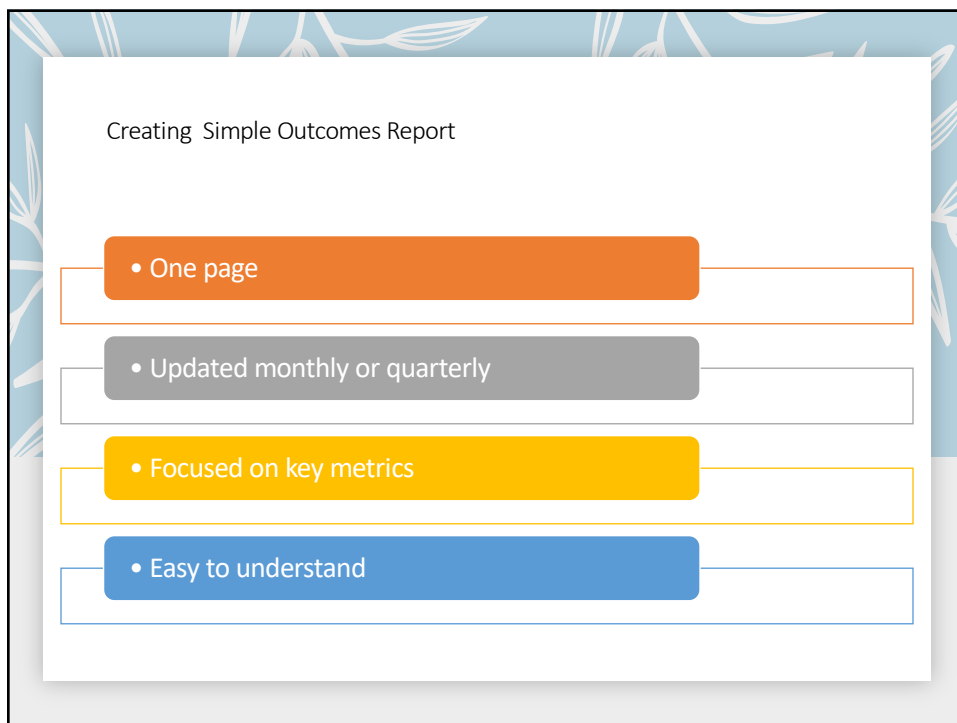
Consider marketing to women's groups, Linked In, networking groups for decision makers

Moving Beyond Brochures

Key Outcomes

- Referral-to-start response time
- Client retention
- Caregiver consistency
- Client satisfaction
- Falls in the home
- Hospitalization





Using Falls Data as a Conversation Starter

Example: 'Of the clients referred to us in the last six months, none experienced a fall.'

Falls are one of the most important concerns for families and referral partners.



Hospitalization Prevention

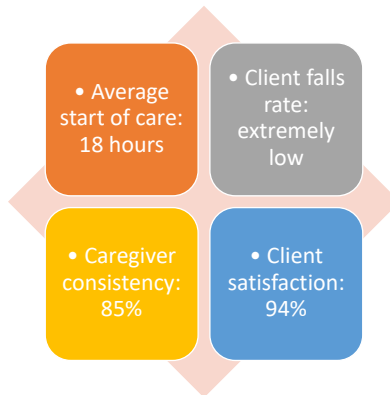


TRACKING REHOSPITALIZATIONS AMONG YOUR CLIENTS CAN DIFFERENTIATE YOUR AGENCY WITH HOSPITALS.



PARTICULARLY IMPORTANT FOR MEDICARE HHAS

Example Outcomes Snapshot



Reducing Referral Hesitation

Provide referral partners with confidence and language they can use with families.



Take Aways

Growth Formula- Use Data To Guide Decisions

Stephen Tweed, Leading Home Care

Focus	Focus on high-hour clients
Build	Build high-value referral relationships
Be	Be consistent in outreach

Turn

One-time clients into
long-term relationships
and referral sources.

Client/Caregiver Goals

Quality of Life

Age in Place

Safety/Comfort

No Falls/Hospitalization

Communication/Availability of Staff

Client Satisfaction



Satisfaction Scores



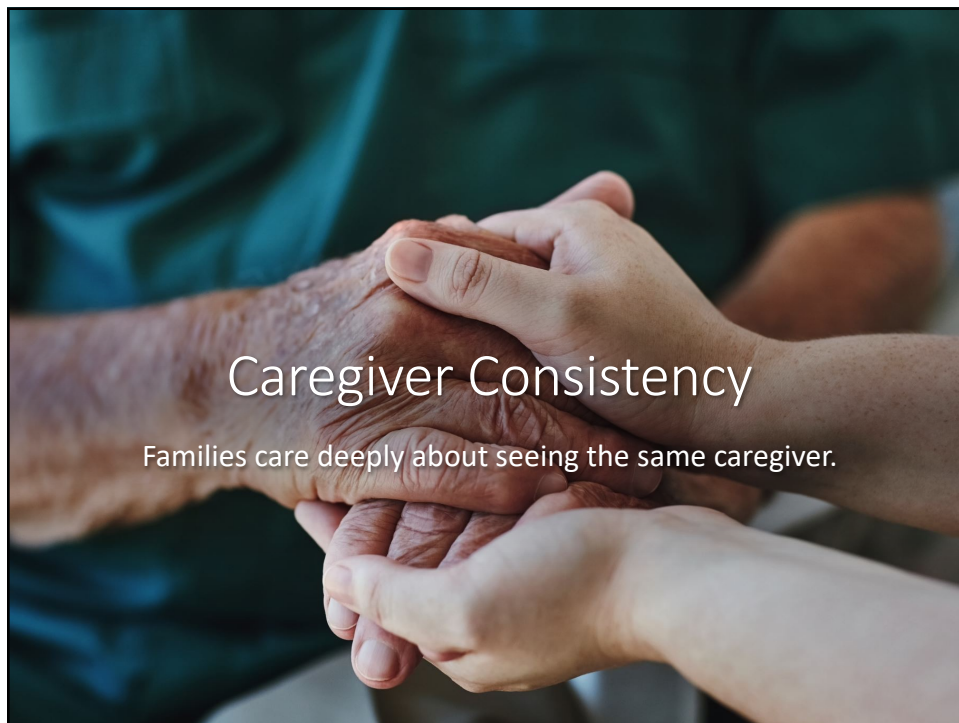
Client Loyalty
Measurements

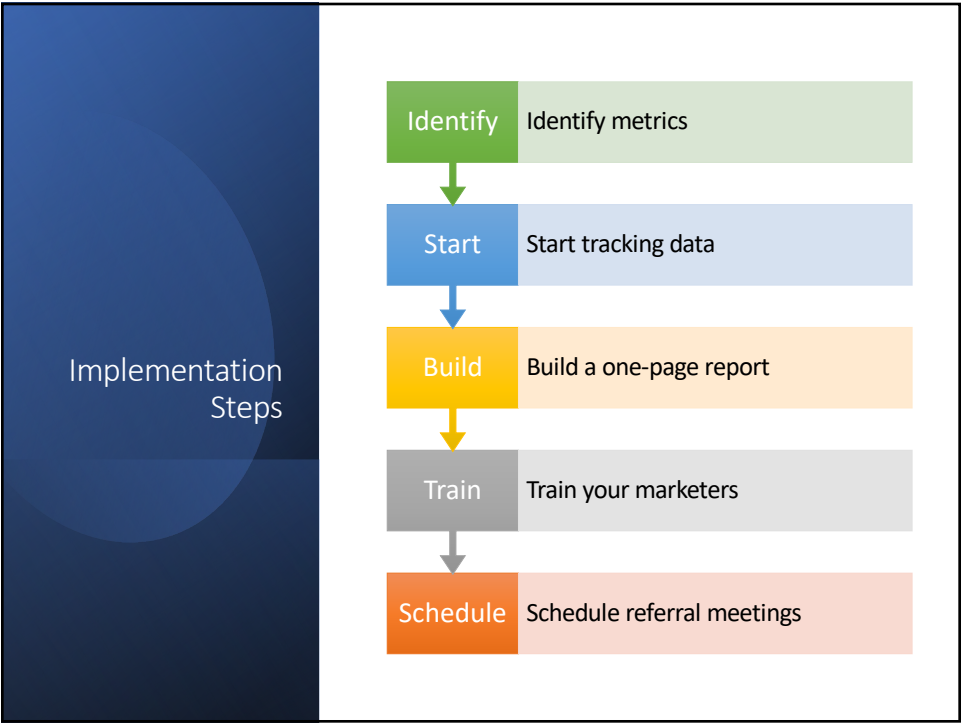


How likely are they to
recommend a service
to others?



Demonstrates client
satisfaction and
referral potential







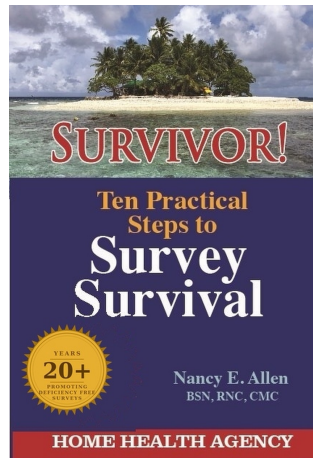
References

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Author: *Survival! Ten Practical Steps to Survey Survival*
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Resources



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Axxess Sr. VP of Clinical Services

Author:
"The Survey Trainer"

References

- Florida Agency for Health Care Administration (AHCA) – <https://ahca.myflorida.com/>
- Florida Statutes, Chapter 400 – Home Health Services – <https://www.leg.state.fl.us/statutes/>
- Health Insurance Portability and Accountability Act (HIPAA) – <https://www.hhs.gov/hipaa>
- National Academy of Elder Law Attorneys (NAELA) – <https://www.naela.org/>
- Certified Financial Planner Board of Standards (CFP Board) – <https://www.cfp.net/>
- American Bankers Association (ABA) – <https://www.aba.com/>
- Geriatric Care Managers / Aging Life Care Professionals – <https://www.aginglifecare.org/>
- Care Management Association (CMAA) – <https://www.cmaa.org/>
- Funeral Homes / National Funeral Directors Association – <https://www.nfda.org/>

Pipeline Ignition

Client Acquisition Strategies That Work

Nancy E. Allen, BSN, RNC, CMC | Arlene Maxim, RN, HCS-C
HCAF 2026

Session Overview

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Participants will learn how to cultivate relationships with elder law attorneys, financial professionals, care managers, and trust officers to fuel sustained business growth.

Learning Objectives

- IDENTIFY — Key steps in a consultation and intake process that converts inquiries into clients
- BUILD — Intentional relationships with elder law attorneys, wealth advisors, trust officers, and others
- USE — Effective consultation practices and communication strategies that build trust with families and referral sources
- TURN — One-time clients into long-term relationships and referral sources

What Makes You Different?

✗ Stop Saying

"We provide great care."

"Our caregivers are the best."

Generic marketing language referral sources hear from every agency

Learn their pain point and meet it!

✓ Start Showing

"Here is the data that proves it."

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One-Page Outcomes Report — Example

94%

Client Satisfaction Score

ZERO

Serious Falls in Home

4%

30-Day Rehospitalizations

86%

Caregiver Consistency Rate

Building Referral Partnerships

Move beyond brochures and donuts. Build genuine relationships by showing — not just telling — referral partners what makes your agency different.

Elder Law Attorneys

- Long-term care planning support
- Family communication and coordination
- Crisis Intervention

Trust Officers & Financial Advisors

- Responsible use of client resources
- Reliable long-term care planning
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- Serving high-net-worth clients

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- Partner with RN and MSW care managers
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- Fast start of care
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- Medication reminders
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- Natural next step after home care ends
- Refer families navigating final stages
- Build goodwill with pre-planning referrals
- Compassionate coordination during transitions

Hospital Social Workers

- Family support and counseling navigation
- Emotional reassurance for families
- Reliable home care transitions
- Clear communication on care plans

Key Response Time Factors

- How quickly can you start care after a referral?
- After-hours, weekends, call-outs covered?
- Back-up staff assigned?

Using Data to Reduce Referral Hesitation

Key outcomes to track and share:

- Referral-to-start response time
- Client retention rate
- Caregiver consistency
- Client satisfaction scores
- Falls in the home
- 30-day hospitalization rate

Example conversation starter:

"Of the clients referred to us in the last six months, none experienced a fall."

Turning Clients Into Long-Term Relationships

Caregiver Consistency

- Families care deeply about seeing the same caregiver
- Consistency builds trust and reduces family anxiety
- High consistency = higher retention and more referrals

Client Satisfaction

- Regular check-ins with clients and families
- Address concerns proactively before they escalate
- Turn satisfied clients into referral advocates

Referral Communication Strategy

- Keep referral sources informed on client outcomes
- Provide regular outcome snapshots — not just when problems arise
- Build your reputation as a partner, not just a vendor

Key Takeaways

- Differentiate with data — stop saying 'great care,' start proving it
- Build relationships intentionally with the right referral partners
- Know your numbers and track the outcomes that matter to referral sources
- Respond fast — response time is one of the most critical differentiators
- Turn every client into a long-term relationship and referral source

References & Contact

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Additional Resources:

- Florida AHCA — <https://ahca.myflorida.com/>
- Florida Statutes Ch. 400 (Home Health) — <https://www.leg.state.fl.us/statutes/>
- HIPAA — <https://www.hhs.gov/hipaa>
- NAELA (Elder Law Attorneys) — <https://www.naela.org/>
- CFP Board — <https://www.cfp.net/>
- Aging Life Care Professionals — <https://www.aginglifecare.org/>
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