The Art of Marketing a Successful Private Duty Agency: Always Be Mindful of Your Core

By Bob Roth
The best marketing strategies of successful private duty home care agencies come from a solid foundation. Rooted in that agency’s core, this foundation becomes the central focus for all marketing activities, decisions, and ideas. The existence of a strong foundation is inherently tied to the perfect synergy between your marketing and operations, and you must be able to express your purpose, your value proposition, and your message externally while maintaining clear internal communication practices.

Laying the groundwork for a marketing plan that leads to a profitable and thriving private duty business is no small task. It takes a lot of hard work, patience, and above all a continued commitment to enhancing your foundation on a daily basis. In essence, marketing a successful agency is like molding a work of art. You are the artist and you rely on the right tools and skills to create a piece that reflects your core and generates interest. By focusing on your marketing message and how it is communicated to your community and within your organization, you will be able to build a foundation that will lead you to success both now and in the future.

WHO ARE YOU?

Before you jump right in and start developing your marketing plan, there are a few important steps to follow that will become the building blocks for your marketing foundation.

First, you need to know who you are and what your purpose is within your business. In my experience, the agencies with the most success have a common passion for caring for others, typically because of a personal experience in caring for a loved one. Working in this highly personal business requires this passion and it’s important to take an inward look at what fuels your inspiration. To best paint a picture of who you are, consider completing a full analysis of why you are in this business and what areas in your life shape your purpose. As managing partner at Cypress HomeCare Solutions, I often rely on my personal spheres, or areas in my life, that reflect my purpose in the community. These areas make up my core and as an owner contribute to my agency’s foundation and overall marketing strategy.

Here is an example of my spheres:

VISION, MISSION, VALUES

Arguably the most important aspect of your business is having a vision, mission, and values statement that expresses your core. This statement contains your morals, ethics, and goals, and it should be the central reference for any and all questions and challenges that will, inevitably, arise. At Cypress, our vision, mission, and values statement is our “holy grail” and is woven throughout our business operations and development. Regardless of the situation, we know we can turn to these principles to find the answer. If you have yet to pen your core values, I highly recommend that you set aside a significant amount of time to develop your vision and mission. This statement is the cement in your foundation, and with a clear vision you will only enhance your purpose.

CREATING YOUR MESSAGE

Now that you know who you are, you can now move on to the next step: creating your message. Not only do you need to establish a message that mirrors your vision, mission, and values, but you also must take into account how that message...
will be received. Understanding what you do well and communicating that to your community is important, but to successfully market your agency, it’s essential to create a message that is viewed in the same way in which it is intended. Achieving this unity of perspective can be difficult, but when you find those messages that relate to the needs of your community, you will be able to create consistent messaging and strengthen your foundation simultaneously. For example, Cypress was built on three purposes that have become our key messages:

- We provide respite for families.
- We train and educate our community.
- We care for individuals affected by dementia and Alzheimer’s disease.

Our first message harkens to my family’s experience of being caregivers for our mom. This experience was really the impetus for creating Cypress. Based on our own knowledge of how respite care affected our family, we consider respite care service our highest priority. Next, our training and educational philosophy has also become a large part of what we provide our caregivers and our community as a whole. We educate our employees on caregiving skills in our on-site training lab, and we invite families in our community to take advantage of our training sessions to better care for their loved ones at home. More than 700 families in the past eight years have been trained for free on the basics of caregiving in our training lab, and we are proud to be paving the way in educating our community, especially on issues dealing with Alzheimer’s and dementia. Our commitment to serving persons with these conditions extends not just to those affected but also to their families, who are caring for them day in and day out. Our work with various Alzheimer’s organizations in our community has resulted in two things. First, we repeatedly see the devastating effects on families and are continuously compelled to care for this group. Second, through our involvement in the Alzheimer’s community and our initiatives in training, we are considered one of the top providers of care for Alzheimer’s patients and their families. Overall, these messages communicate our core and solidify our foundation, and we remain focused on these throughout our marketing efforts.

**Referral Marketing Is The Key**

Now that you have a good idea of who you are and have created your message, how do you put it to good use? Understanding where to market is essential in maintaining your foundation and growing your business, and referral marketing is your key to success. Unlike consumer marketing, referral marketing focuses on one-on-one interactions and relationships in order to generate business. While consumer marketing is one-way communication that involves commercials and advertisements directed to the consumer, referral marketing is a two-way communication practice based on conversations, connections, and trust building among community partners and key influencers. Successful private duty home care agencies connect with referral partners in relationships that support each other’s goals. Two important referral sources home care agencies should partner with are home health and hospice organizations. Not only do they provide your clients with an alternative option for when they, inevitably, fall out of the private duty scope, but they also encourage a two-way referral network that promotes each organization’s values and vision.

Leveraging your referrals is an obvious way to market, but there are many other choices in marketing you must sift through when developing your plan. I like to use the analogy of “fishing in an ocean” versus “fishing in a barrel” when considering the different types of marketing. The options for marketing your private duty agency are endless and it can feel as if you are being inundated with “opportunities” promising a return on investment that sounds too good to be true. Often times it is. Avoiding this “ocean” of opportunities allows you to concentrate your efforts on what will directly affect your agency for the better; finding that “barrel” with select and specific marketing tools will enhance your agency’s focus. At the end of the day, cultivated relationships and personal connections with key influencers will yield much more profitable results than any one-way marketing tactic.

If you are looking to introduce a consumer marketing approach, make sure that it is part of an overall marketing plan and not your only marketing plan. Only after you have successfully created a referral marketing base can you branch out to a less personal form of marketing. At Cypress we have been afforded the opportunity to produce television, radio, and print advertisements because of our foundation with referrals, and we are fortunate in not having to rely only on this tactic for our core business. Again, your foundation will only strengthen
with the trust and confidence of your community partners as built through a comprehensive referral marketing program.

COMMUNICATING WITHIN YOUR AGENCY

The marketing steps and strategy I’ve discussed are important, but without effective communications within the operations of your business, it will be impossible to create a solid foundation for your agency. With close to 30 years experience in marketing, I have seen both how ineffective communication among the cross functional components of a business can create serious issues and how quality communication within companies can boost a business’s growth and success. Your marketing strategy is important, but you need the backbone of your operations to fully support your commitments. Make sure that you keep communication flowing and that you continue to work together as a unified entity.

COMPETITION

An important part of starting your marketing plan lies in understanding your market. Even in a market as large as Phoenix, where over 500 home care agencies are in operation, there is enough business for all of us to be successful. It can be daunting to see that there are hundreds of other private duty agencies doing the same work in your area, but when you consider your metrics and do the math, you will see that the need for home care services far surpasses any agency competition. Personally, I view other private duty home care agencies as allies. Aligning your agency with others that share your core values will only ensure an overall increase in the standard of care provided to your community. Through close working relationships with other private duty companies and community partners, we can unite our efforts and promote our quality of service above those of our true competitors: independent caregivers and registries.

Bottom line, working with our fellow home care agencies allows us to help individuals and their families remain safe and secure under the protective wings of an agency. These alliances are also beneficial when working towards joined legislative goals and when advocating for home care rather than institutional care. Yes, there are many agencies out there, but by considering these as your friends rather than your foes you will enhance your agency’s foundation as well as the foundation of the private duty industry as a whole.

“ALIGNING YOUR AGENCY WITH OTHERS THAT SHARE YOUR CORE VALUES WILL ONLY ENSURE AN OVERALL INCREASE IN THE STANDARD OF CARE PROVIDED TO YOUR COMMUNITY.”

WHAT’S NEXT? A PRIVATE DUTY HOME CARE CORE IS THE FUTURE

Always referring to your core in your marketing plan is vital. But what impact does your core make on the overall private duty landscape? All of us are striving for long-term success with our agencies. In order to do so, we must unite our individual successes and create a future for private duty home care that will stand the test of time. At the NAHC Strategic Planning Congress in January, Dr. Lance Secretan, leadership coach, consultant, and world-renowned speaker, talked about the use of “dream statements” in creating your vision and thus your foundation. He gave attendees the task of drafting a dream statement for our industry. I was privileged to be part of the group that crafted this dream statement: “A world in which all can enjoy home as the center of care.” We are all in this together, building our foundations and contributing to an overall vision for our future. Creating a masterpiece takes time, and through a commitment to our core and to establishing strong foundations individually and collectively, this dream — our dream — can and will flourish.

About the Author: Bob Roth is Managing Partner of Cypress HomeCare Solutions in Phoenix, Arizona and is Managing Director of One On One Home Care Solutions, a private duty consulting company. With close to 30 years of experience in consumer products, goods, and home care marketing, Bob is an expert in communications and in utilizing various marketing mediums to enhance communication and effectively support customers and peers. He can be reached at bobroth@cypresshomecare.com.