


A photograph showing a woman with dark hair in profile, embracing an older woman with grey hair. The scene is intimate and emotional, set against a soft, out-of-focus background. A teal graphic overlay is positioned in the lower-left quadrant, containing the title text.

Expert Guide to Home Care Marketing

By David Mills, MPA



In Brief: *It's easy to become preoccupied with the daily operation of your agency. The demands of hiring caregivers, winning new customers, and the never ending list of management duties can push any leader from a focus on strategic growth to just **grinding** out daily tasks. A high impact plan for marketing rises above tactics and positions your home care or home health agency for growth.*

Getting Strategic with Home Care Marketing

The first step toward growth is to move back from a list of disconnected survival tactics toward more strategic leadership. That means bringing the big picture back in focus and creating plans that connect the opportunities and the challenges. For most home care and home health agencies, the big picture includes at least four key considerations. See which ones you find true in your setting:

1. The opportunities continue to grow with 10,000 baby boomers turning 65 every day.
2. Recruiting and hiring caregivers and health providers is a continuing challenge, with low unemployment rates and a shortage of qualified people to hire.
3. Home care marketing activities are disconnected from the sales and hiring processes that you work day to day. It might make the phone ring, but marketing doesn't qualify leads or bring the right employees to your door.
4. The competition continues to grow with both local and franchise operations working to capture market share with large media buys and quality marketing materials.

Here is some good news. With the right marketing approach, you can make big progress in all four of these areas. Instead of using a loose collection of miscellaneous

advertising and outreach efforts, your marketing can help organize and connect the process of reaching more customers, integrating and tracking leads, recruiting employees, and allow you to compete with even the largest franchise systems.

Changes in marketing (because of technology and social media) have created new ways to connect and improve essential growth activities like sales, customer service, and hiring.

All of that can happen by using a best practice process such as the one outlined here.

Guide Overview:

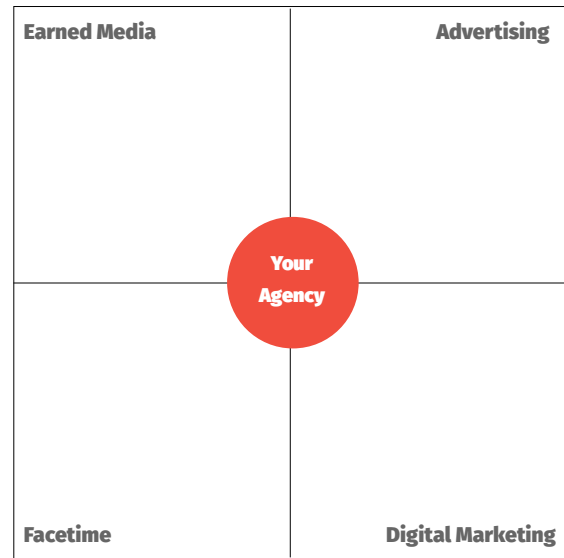
- **Review Your 4 Marketing Quadrants**
- **Quadrant Worksheet**
- **Create Personas**
- **Track Your Outcomes**
- **Implementation**

Review Your 4 Marketing Quadrants

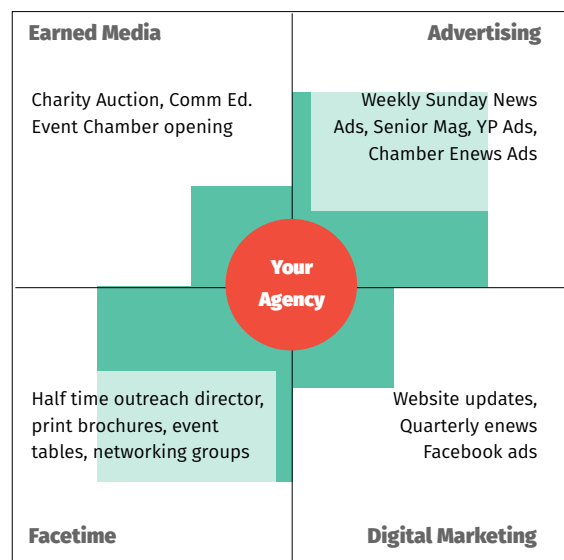
It is helpful to view your marketing efforts in 4 categories, or quadrants. They are:

1. **Facetime** – community outreach, client and family referrals, institutional referrals, and all print materials like brochures and information sheets that connect you personally to people who send business your way.
2. **Earned Media** – traditional and digital press, community recognition, charitable service, community awards and boards.
3. **Advertising**- traditional ad placements on radio and TV, newspaper ads, Google ads, direct mail, and display advertising like billboards and signage.
4. **Digital Marketing** – inbound marketing including online content, search engine optimization (SEO), social networking, social ads, video (we include video in social), mobile ads, email, e-news and websites.

(Note: we treat some digital activity as advertising and some as marketing based upon whether it builds long term value online or if it disappears when you stop paying. This is different than grouping all digital together, with groupings by function instead of communication type.)



Start by noting the amount of time and money you are spending in each quadrant.

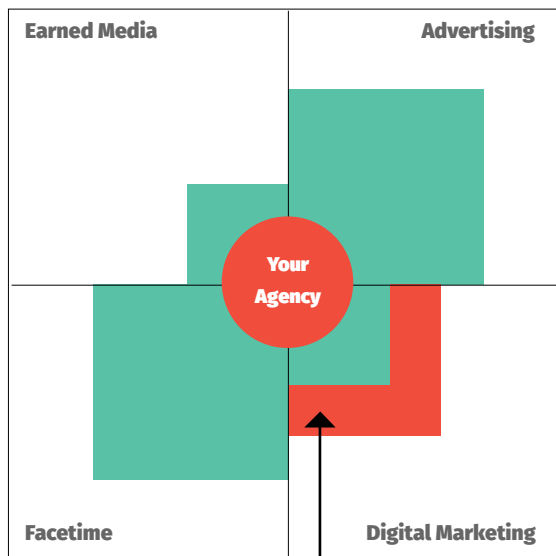


Review Your 4 Marketing Quadrants {cont'd}

For home care and home health agencies this is a pretty lopsided picture, the majority of marketing dollars and time going into two of the four quadrants. While equalizing spending or effort is not the goal, putting your time and money into the most effective investments can help you grow.

Compare your marketing to other home care and home health agencies.

You should first compare yourself to other businesses. Research indicates that in home care and home health, 35 to 40% of marketing dollars should be going toward digital marketing. There are a number of reasons for this, but one big one is the tracking. With digital marketing, you can see which investment is creating online and telephone traffic and what parts are leading to new cases and staffing hours.



Compare against businesses nationally

Another way to compare is to see how you stack up with businesses nationally. Businesses in the United States currently spend about 50% of their marketing budget on content, which is primarily digital, and 30% on advertising. Content includes online articles, video, social media and graphics. This represents a big shift for businesses that want to sustain growth. Most home care and home health agencies aren't using this spending mix – instead they are heavy on advertising and light on content. That is, they don't have much website content, few videos, limited social posts, and little in the way of online graphics.

Here is why your focus on content matters – content is placed online and attracts visitors who are coming from online search engines. This content is an “owned asset”, because it increases in value over time, as the website and all the connected digital communications grow in search authority. By comparison, advertising by definition is a “rented or leased” space. It only appears in a newspaper, or a digital space, as long as you continue to make the payments. Once you stop – it disappears without a trace (with no residual search value or impact).

This distinction separates pay per click (PPC) ads like those offered by Google and Bing, from social ads like those on Facebook, because they create online traffic that continues because it stays in the stream of the Facebook user. PPC ads simply disappear. For instance, a boosted post or Facebook Ad, can still be searched and shared long after the payment is over. While PPC ads are digital, the truth is that they are often not tracked well (lack of

Review Your 4 Marketing Quadrants {cont'd}

organization and analytics), and don't have specific web pages designed for those who respond. We recommend that you treat PPC as advertising, and social ads as Digital marketing.

Where are home care agencies spending their digital marketing dollars? The most frequent investment is search engine optimization (SEO), which helps bring traffic to their website. This ranges from investments in outside SEO companies, some of whom promise magic results, to integrated approaches that understand that SEO has changed and now is a content focused effort. (More on SEO below).

What about Employee Recruiting?

Take a moment and note on the chart any marketing activities that are currently attracting potential employees. Once you've done this, it's important to pay attention to which activities might be working for recruiting, and which marketing investments are entirely disconnected from the recruiting process. Since hiring is so deeply tied to growth, marketing investments that don't also help with recruiting can be very problematic – and ineffective.

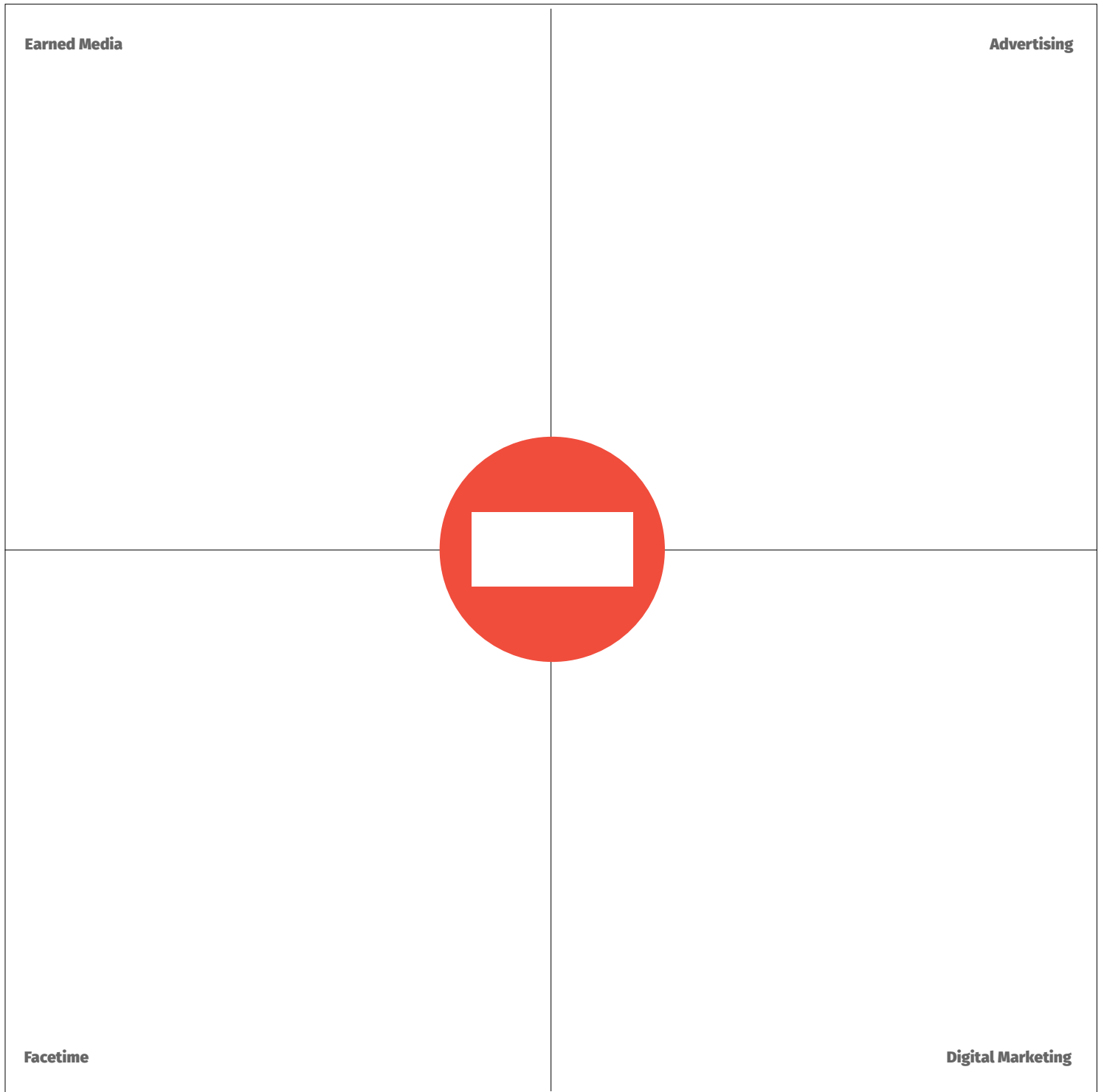
A Final Critical Comparison

It's one thing to compare where your marketing investment is going, but it's another thing to see where your customers are, and to deliver value to them within their own context.

The goal of your marketing should be to present your story so that it becomes part of the customer's story. That means that you have to present your messages in the places where your customer usually consumes information. The more your marketing quadrants match your customer's information quadrants, the greater the opportunity for them to catch your message, internalize it, and either act upon it or share it.

Take the same four quadrants and do some brainstorming to write down all the places that your best customers are most likely to be exposed to your message. Compare that with your investments to see how your marketing should be re-focused.

Your Worksheet



Key:

- Current Spending
- Marketing Shifts to Make
- Best Employee Recruiting Marketing

What's Next? Create Personas

Personas are fictional characters that are created by taking all the key characteristics from your best customers and creating a composite. Their preferences, schedules, hobbies, styles, as well as the more detailed demographic characteristics, are all put together along with communication channels like email and Facebook to create a persona. The persona should have a name and other specific characteristics that represent the very center of your marketing target. This persona should be written and have a life story that helps you and those in your team to think about them whenever your plan marketing activities and strategies.

CREATE THESE PERSONAS:

- Decision maker who decides to purchase your services (often an adult child).
- Leaders or managers who make referrals from institutions.
- The ideal employee.
- People who make personal referrals because they appreciate your services to them.

Persona development is a critical step in effective marketing because it brings into clear focus how your organization can meet the needs and priorities of customers along with employees.

Create your customer persona(s)

Use the persona tool to answer key questions about the lifestyle, preferences, needs and communication style of the customers you want to reach. Talk with existing and potential customers as you answer the questions. Create synopsis of all of these responses in a written persona document.

[GET THE PERSONA TOOL](#)

The finished persona will allow you to review each part of your marketing strategy to see how this ideal customer would respond.

Create an employee persona.

To create an employee persona, identify the key characteristics of great employees using the persona guide. Using this information you will be able to tailor the content imagery and marketing outlets that you use for recruiting. When you add inbound marketing to the persona (more below), you will build powerful new ways to attract the best employees.

How personas improve employee recruiting

While we usually think of marketing as something that is focused on finding new customers, the other critical marketing focus area is recruiting employees. You should also develop a persona for employees.

Now create a referral persona (or two)

Referrals don't happen by accident – they are cultivated and requested based upon the reputation and experience that people have with your organization. A persona for individual referrals, and also one for institutional referrals, can help you target and communicate with referral sources more consistently with better results.

Action step- complete your personas. A key step toward improving all marketing is to have a deeper understanding about your targeted customers. This is accomplished through market research and the development of buyer personas. If you aren't able to complete this work, then get help from an agency. This process, when completed by an agency, like Story, will also involve market research which can deepen the insight and the effectiveness of your marketing. Getting started, you should have detailed personas, that you and your staff complete.

Select the Right Marketing Channels

It can be a challenge to know which communication channels you should use. Do you want to email, text message, Facebook, Twitter, LinkedIn, Pinterest, Instagram, Snapchat, Youtube, Slideshare, Quora, or any number of other choices?

There are three important factors you should consider as you select which communication channels will serve you best:

1. Line up your choices with your customer preferences. This is a key use for the personas that you have developed. If they use it, you should use it too.
2. Growing companies use a lot more communication channels than those who aren't. That's another reason you should be using a marketing system and not trying to manually wrangle lots of communication channels.
3. Consider how many channels you can manage well – you may need to prioritize any additions so that you add one and master it before adding more channels.

It's important to note that every communication channel has its own unique style and best practices. You should not be taking the exact same content and simply pushing it out online. And many communication channels are designed to be 2-way. Make sure that you aren't just using them as broadcast channels. Someone needs to be watching and listening on your end.

Look hard at all of your marketing investments.

Look closely at legacy marketing – you know – those things you've always done.. If you have been in business for multiple years, then some marketing strategies can become an assumed component of your outreach. If these methods cannot be tracked, then it may be time to experiment with other options, especially if they don't line up with your target personas.

Reach out to **Story Collaborative** for a **free consultation**

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Track Your Outcomes

The shift toward digital marketing, and digitally enabled marketing, means that almost every marketing activity should be trackable. Tracking should include the obvious digital elements like social media, email, websites, all digital ads, and special landing pages linked to print ads and events, as well as telephone calls (which can be traced back to the online keyword) and text messaging. A digital analytics dashboard should be used so that you can see all of your outcomes in a single place.

If you go back to your marketing quadrants and write down the number of new customers, employees and referrals that come from each quadrant you will see what may be working.

A Key Step: Connect analytics to your website

Easy to read analytics like the sources and page performance reports in Hubspot, or more complex analytics like those provided by Google, allow you to understand and improve the interactions that you are having on your website. Regular review of your analytics can help you to identify what is working and what needs improvement.

If you aren't sure how to access or read analytics, it may be helpful to get a professional review. That will help you learn about the key things that managers should be watching in their marketing, and connect you to practical help in the process.

The right analytics – and using channels that can be tracked digitally allows you to use a dashboard approach to marketing. As a home care manager, that can save you time.

Watch for these key areas to grow as a result:

- The number of website and digital visitors who learn about your agency, and how this number grows over time.
- The number of people who become leads (they identify themselves so you can nurture the relationship)
- The number of customers that you can track back to the marketing .source.

“You can only achieve your goals when they are clear”

Implementation

It's one thing to create a plan, and another implement. Once you have the framework that includes an evaluation, personas, channels and tracking you can take your marketing to the next level. You will want to consider a number of key elements which include:

- Search Engine Optimization (SEO) – how people find you online.
- Paid digital ads on Google and social networks.
- Customer Relationship Management (called a CRM for short) – that's how you build and nurture relationships online.
- Creating great content – that is what both humans and search engines want.
- How to deliver engaging social media content.
- Mass media and how that fits your strategy
- Marketing systems to keep this all connected and effective.
- Linking together your marketing and sales

Taken separately, all of the elements are just tactics. And tactics alone become disjointed and hard to manage – like running 15 completely different home care agencies. When you harness powerful tactics inside a marketing strategy they shift from being disconnected tasks to a powerful system that builds more visitors, leads and customers. It also allows you to consider what kind of help you need to achieve your goals.

Marketing plans should always circle back to your goals – what do you want to achieve?