



8 Steps to Improving Client Experience in Home Care

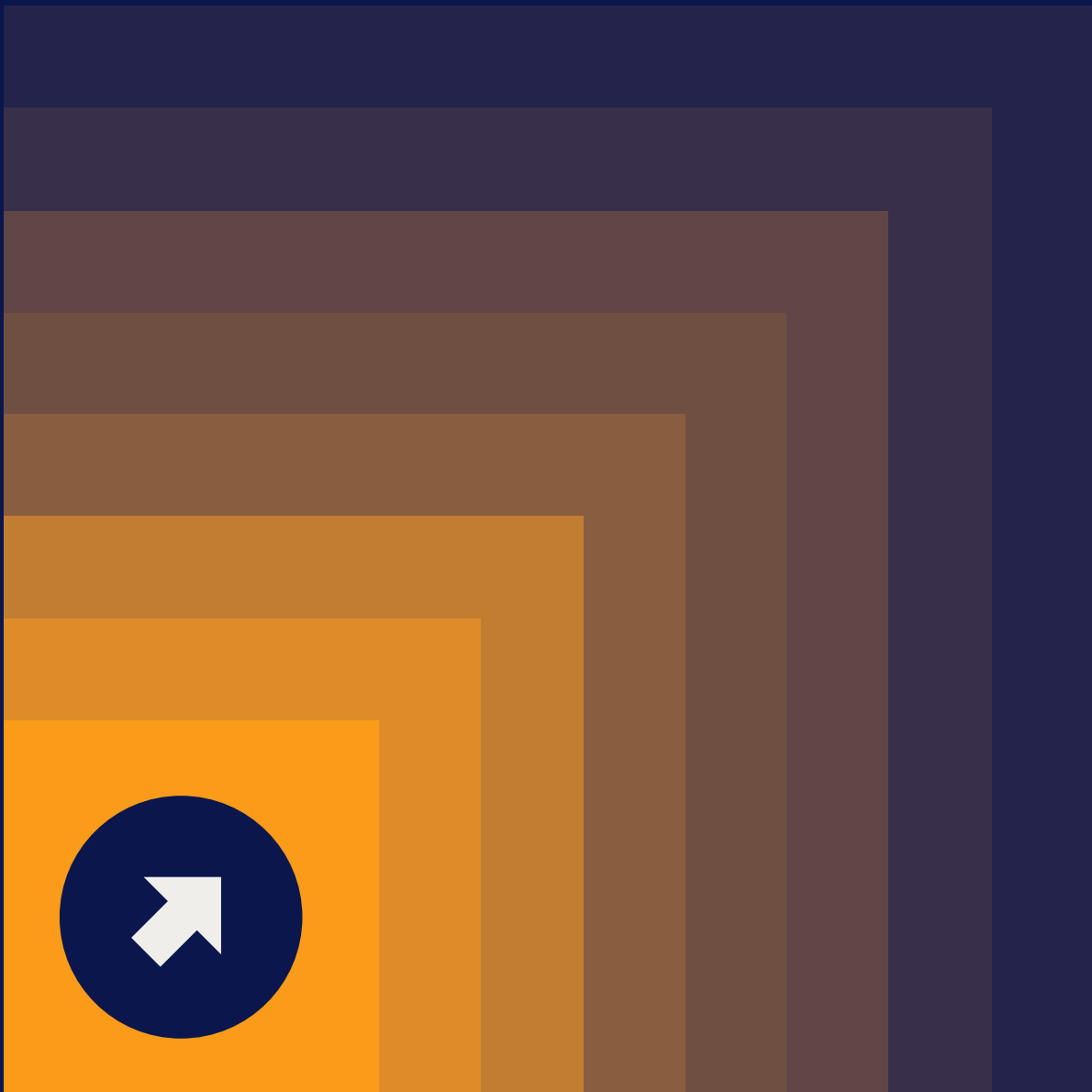


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⦿ OVER TO YOU!

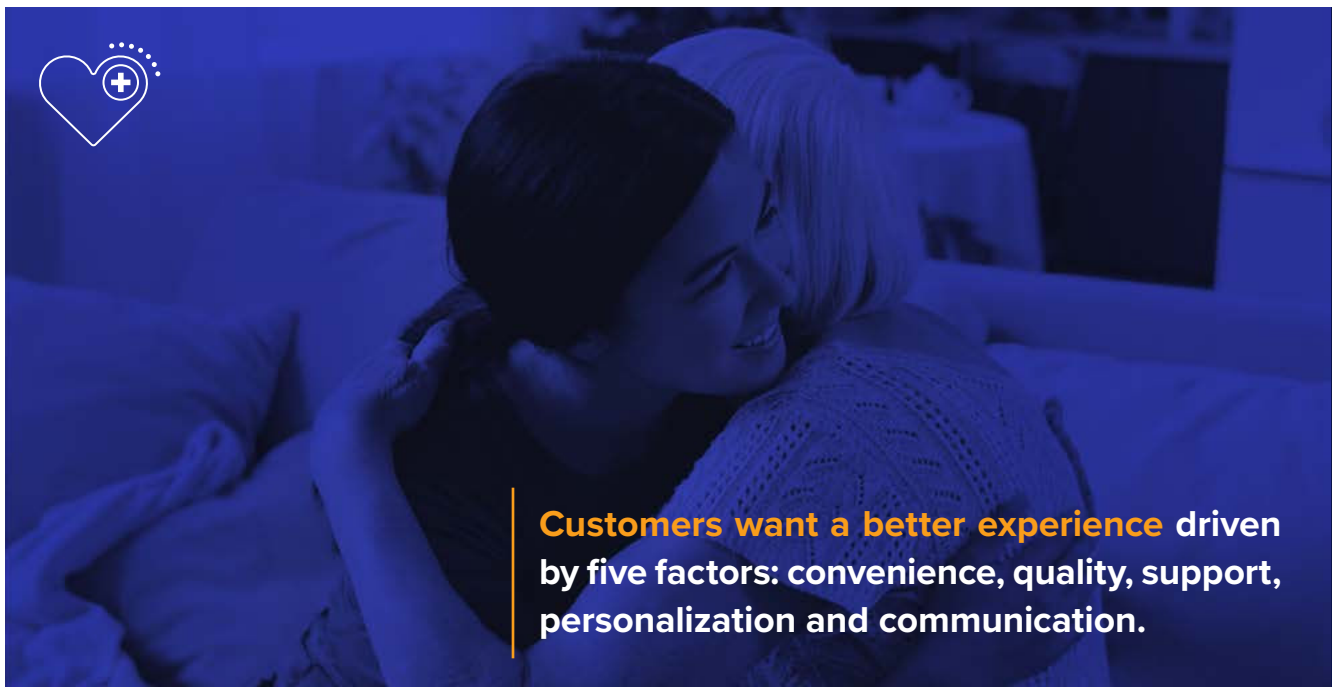


Introduction

Health care is a seminal industry in any country. In the U.S., it is the fifth biggest, but routinely ranks poorly in client experience – in fact, a Siegal+Gale Global Simplicity Index ranked it last out of 25 top industries in terms of simplicity. A history of wait times, confusing reports, complex language, forms to fill and insurance headaches have created an aura of difficulty for people who must access health care.

But the tide is turning as health leaders are now prioritizing a better customer experience. A recent piece of research from PwC's Health Research Institute shows that half of U.S. health-care institutions are embedded an improved client experience in their current strategic plan. (It's not enough, but it's a start.) That same report shows that customers want a better experience driven by five factors: convenience, quality, support, personalization and communication.

This trend aligns with where health systems and payment models are heading right now. Consumer-directed care is coming into sharp focus, where people are empowered to be key decision-makers around when, where and how they receive care.



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Meanwhile, older fee-for-service models are giving way to value-based-purchasing, where simply providing a service not tied to outcomes is no longer sufficient. Instead, providers are compelled to achieve measurable goals tied to quality of care, patient experience, and resources used. Few areas of health care are as heavily impacted by this consumer-directed care shift than home care.

But in order to deliver the experience that clients want, information is necessary. In that PwC report, a whopping 88 percent of health providers said they have insufficient data about their customers. Despite the rise of EHRs and data science, client data is disorganized and spread across different systems in different organizations, leaving any one provider – let’s say, a home care agency – in the dark on that person’s journey and what their preferred experience is.



Nearly all the health leaders surveyed say that they need new ways to measure that experience, with data that reflects quality of life, overall well-being, timeliness, how much the consumer feels actively part of their own care, and how they interact with the system at different touchpoints. By measuring experience, it is possible to then manage it.

In a 2020 survey with Home Health Care News, AlayaCare found that the biggest pain points by far facing U.S. home care agencies was normalizing operations after COVID-19, and solving caregiver shortages. The client experience is wrapped up in both these key challenges, and must be addressed to keep each agency competitive and sustainable.



Objectives

This guide is co-created by **AlayaCare** and **Home Care Pulse** (HCP) and designed to help home care organizations evaluate and tweak the overall experience they deliver to clients.



About AlayaCare

AlayaCare is a provider of revolutionary cloud-based home health care software. With an end-to-end solution spanning clinical documentation, back-office functionality, client and family portals, remote patient monitoring, and mobile care worker functionality, AlayaCare offers a platform for agencies to propel towards innovation and home care of the future.



About Home Care Pulse

Home Care Pulse helps home care agencies set a foundation for sustainable, long-term growth by turning clients and caregivers into loyal promoters. By providing home care professionals with detailed, unbiased clients and caregiver feedback captured through monthly phone surveys, agencies can uncover blind spots, pinpoint strengths and weaknesses, and ensure consistent quality of care and employment. Based on client and caregiver ratings, agencies can qualify for Best of Home Care awards that provide tangible proof of quality care. Review Manager helps agencies monitor all of their reviews and build their online reputation from a single platform.



In this guide you'll find the eight steps we think are most important to consider in order to improve your client experience, as well as key takeaway questions presented as thought starters:

STEP 1 Consider your client a consumer

STEP 2 Use the voice of your clients

STEP 3 Capture client feedback

STEP 4 Map the client journey

STEP 5 Seek full transparency

STEP 6 Be adaptive to your clients' needs

STEP 7 Leverage technology

STEP 8 Use your data

At a high level, this guide is designed to answer the following key questions:

- ✓ Does my organization consider client experience in its everyday operations?
- ✓ Do I need to improve the client experience?
- ✓ Do I have any data on my client experience?
- ✓ Do I have the tools in place to measure client experience?
- ✓ What tools would help me improve my client experience?
- ✓ What tools will help me capture data on client experience?
- ✓ How can partners like AlayaCare and HCP help me improve client experience?

LET'S EXPLORE



STEP 1:

Consider your client a consumer

For several years now we've witnessed an industry shift toward customer-centric models of care. From **Consumer Directed Care** in Australia, to the expansion of **Direct Funding** in Ontario, to CDPAP in NY State – not to mention the rise of value-based purchasing – care recipients are more empowered than ever before to dictate the terms of that care. That's why step one of this guide is to ensure you consistently view your clients as consumers, as that will help dictate their experience.

In home care, no stakeholder is as essential as the client, particularly as they take over the driver's seat in choosing how they receive care. From selecting services on their own terms to having their personal information available on-demand, consumers are more knowledgeable than ever before. They expect the services they receive to match their expectations. One recent Forbes article found that **75 percent** of consumers want the same experience in healthcare that they get from other industries.



When viewing clients as consumers, a good place to begin is with language. **“Patient” is still in widespread use, it doesn't well reflect today's efficient, tech-savvy care recipient; instead, it evokes an image of someone without a sense of agency.** That couldn't be further from the truth, and can lead to a **misconstrued experience** if agencies and the caregivers employed by them view clients as conditions, rather than people.

KEY QUESTIONS



- ✓ Does my organization consider client experience in its everyday operations?
- ✓ Do you think of your clients as consumers?
- ✓ Are you planning to revamp the customer experience at your agency? If so, how? If not, why?
- ✓ Do your internal and external materials use language that evokes consumers?
- ✓ Do you frame your operations in terms of the positive outcome for your client?



STEP 2:

Use the voice of your clients

Among the many changes that have happened as a result of the meteoric rise of online shopping is that we all tend to consult online reviews before buying any product or service. We are being conditioned to listen to people we will never meet, and if enough of them have positive things to say, we will then make a purchase.

In home care, an important and deeply intimate service that will be relied heavily upon, that is absolutely the case. As **this HCP article** points out, the “voice of customer marketing” is a valuable way for clients to get a more authentic look at an agency and, most importantly, it is a form of marketing that they trust.

Your current clients are ultimately the most convincing source of referrals. Engage with them to solicit reviews if they are so willing, emphasizing how important it is that their voice is heard. This is also a great opportunity to manage any issues they may have at the time at an individual level. Positive reviews can be packaged on your website, and in any marketing materials. This feeds into a current client’s experience by making them feel part of the organization, just as they are active members of their care plans. Ask them about what is most important to their experience, what they are dissatisfied with, and co-design specific strategies to improve your service – and their experience.

KEY QUESTIONS



- ✓ What are your customers saying about you? How do you know?
- ✓ How are you asking your clients for feedback?
- ✓ Do you take time to respond to online reviews on trustworthy sites?
- ✓ Do you include positive client reviews on your site?
- ✓ Do you have sufficient time dedicated to nurturing your relationship with your clients?



STEP 3:

Capture client feedback

Step 2 was about finding, understanding and leveraging client reviews of your services online. Here we seek to bridge any communication gaps with clients in order to identify emerging issues as early as possible, and deliver solutions quickly.

Don't underestimate the power of surveys, which tend to have a high engagement rate when they are completed by people who are directly impacted by the results. Issuing periodic polls to both clients and their family and friends is a way to both glean valuable insights as well as make them feel like they have a voice in the operations.

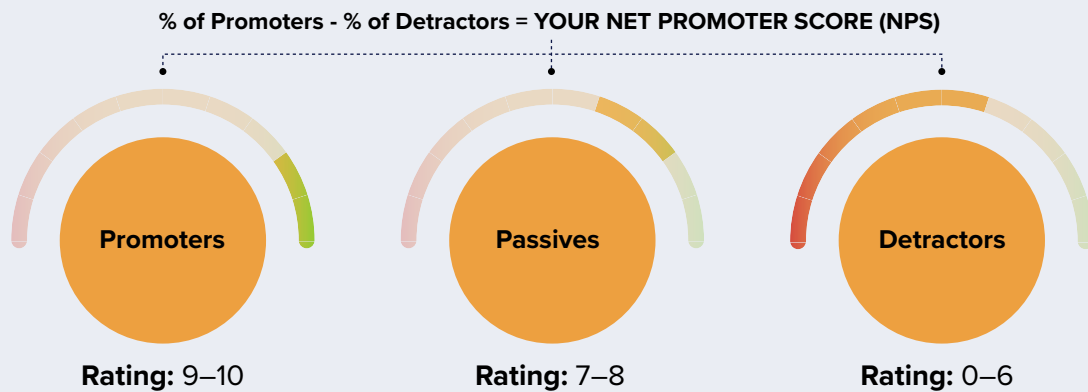
According to HCP, phone surveys tend to yield a higher response rate, and offer the chance for follow-up questions and a more natural exchange. In general, surveys should ask how about how satisfied they are with specific elements of your service, if it meets or exceeds expectations, what specific things could be improved, rating of relationships with caregivers, and anything you want to capture that may deliver intel into the customer experience. In developing questions, try to get as granular as possible, with a set of concrete questions that will yield actionable information.”





The most important question may be: how likely are you to recommend our agency to a friend, from 0-10? This question is at the root of Net Promoter Score, a metric distilled directly from responses to that question.

How likely are you to recommend our agency to a friend: Rate 0–10



For more on this, see this [AlayaCare article](#)

Apart from collecting higher-level survey data, be sure to build open lines of feedback on your website and right within client portals. That way, staff can see and respond to issues in real-time, which is clearly a way to improving the client experience.

KEY QUESTIONS



- ✓ In what ways are you soliciting and accepting feedback?
- ✓ Do you have methods to capture “evergreen” data (ongoing intel about client satisfaction)?
- ✓ Do you have methods to capture “crisis-specific” data to gauge well-being of clients during COVID-19 (and future problems)?
- ✓ What methods of communication are you using to respond to complaints?
- ✓ How are you encouraging participation from your clients in surveys?
- ✓ During the pandemic, with fewer in-person visits, how are you listening to your clients?
- ✓ What is your NPS?



STEP 4:

Map the client journey

Home Care Pulse has explored a great deal about the **client journey**, a vital aspect of the overall client experience. Home care agencies must be there for clients each step of the way, serving as their foundational care provider – and that’s where a client journey map comes into play.

This tactic explores how each of your client interactions fulfills your company’s vision and mission, allowing you to evaluate whether each step is leading you toward larger goals and values, or if they’re falling short along the way. Think of it as benchmarking against your *brand*. It may seem odd to refer to a home care agency as a brand, but it’s an important mindset to have when it comes to customer experience. Just like a customer journey when considering and purchasing a car, a home, a vacation, what’s their end-to-end experience with every touchpoint along their journey with you?

The journey, for instance, generally begins online. Is your website easy to navigate? Are the services you provide clear? Move through each of the stages and milestones your clients experience from initial service investigation down through ongoing support. As you’re outlining, you may uncover where your services are lacking, where you could either add or improve on your current touchpoints. Start to fill in these gaps and repair any missing places on your map as you go.

If you offer a variety of services, consider creating a client journey for each one, from recruitment to onboarding to care plan and scheduling development, to what’s in place to ensure they are safe at home and satisfied with the care. Combine it with client intel you glean in steps 2 and 4 to stay flexible, hold your own agency accountable, and pivot as needed to bolster services.



KEY QUESTIONS

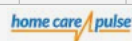


- ✓ How many unique client journeys would my agency have?
- ✓ How can I map each of them out accurately?
- ✓ Have you analyzed where any gaps reside?
- ✓ How are you using client feedback to course correct?
- ✓ What is your agency most known for (brand)?

JOURNEY MAP EXAMPLE

The Home Care Client Experience

Measure	Inquiry to Admission Ratio % of Clients		Net Promoter Score, Satisfaction Management, Sales per Full-Time Employee, Caregiver Turnover, Client Avg. Length of Service, Client Avg. Lifetime Value			
Brand Promise	Communicate Promise		Deliver Promise			Reinforce Promise
Journey Stages	Service Investigation	Purchase	Care Setup	Communication	Care Delivery	Ongoing Support
What the Client Values	To feel of our compassion and confidently know we are the best choice for them.	To feel confident they have made the right choice	To feel confident the care is customized to meet their needs	To be in the know regarding upcoming changes, improvements, and updates	To know they are receiving the best care available	To know they can get a hold of us 24/7 and feel like they are our most important client
Touch Points	Telephone inquiry call	In-home assessment	Introduction to caregiver(s)	Online access to schedule	Monthly caregiver training	Client education and resources
	Website	Detailed review of care needs	Care plan deployment	Friday check-up calls	Caregiver engagement on each shift	Referral partner engagement
	Internet searches	Service agreement	Satisfaction Management Setup	Email updates of care	Quarterly care plan review & update	Invoices
	Referral partners	Q&A document	Calendaring of care shifts	Quarterly care review	Supervisory visits & spot checks	Collection process
	Referrals from Current Clients	Satisfaction reports shared	Billing setup	24/7 support line	Professional appearance of care team	24/7 on call
	Home Care Pulse Certified Awareness	Written testimonials		Telephone etiquette & interaction	Consistency of caregivers	Care Coordinators
	Best of Home Care Award Awareness				Timeliness of caregivers	Office Team
	Information Packet in mail				Filling last minute schedule changes	



[DOWNLOAD HERE](#)



STEP 5:

Seek full transparency

Trust of course drives every relationship. For customers and their care providers, it is essential. Unfortunately, lack of trust and transparency is a huge issue in healthcare, with basic expectations from price clarity to care consistency lacking. Consider that **one-third of consumers** have not moved forward with medical treatment because of a lack of trust in the care they had been receiving.

So how to foster greater trust among home clients? It starts with them feeling heard (**see steps 2, 3**) – and agencies being honest when issues arise or when changes must occur. Importantly, take a solutions-oriented approach to all questions and concerns from all members of a client’s care team, including their family members.

It’s best to personalize that approach, and when responding to such questions, skip the automated tools in favor of customer service elements that enable you to interact with clients as soon as possible (**more on that here**). Certainly, technology can enable a two-way flow of information here, through video conferencing and family portals, and other modes of engagement.

By building engagement with consumers and truly understanding their needs, you’ll ensure ongoing positive interactions with your company.

KEY QUESTIONS



- ✓ What are you doing to build transparent systems for your consumers?
- ✓ How are you engaging your clients?
- ✓ In what ways do you actively build or maintain trust among clients?
- ✓ Do you consider a solutions-oriented approach when issues arise?
- ✓ Are you using technology to help ensure a transparent flow of information with your clients?



STEP 6:

Be adaptive to your clients' needs

Client-centered care begins with working with them to co-design care plans, schedules, and all the elements of home care services. This has been a method explored at the hospital level, but to a lesser degree in home care – but that is an opportunity lost in building the ideal client experience.

COVID-19 has had such a massive impact on how care is delivered and client retention is crucial. The pandemic has proven that staying adaptable to clients' needs is essentially table stakes. Here, consistency of care comes into sharp focus – clients need to feel that they are safe with caregivers coming into their home – and that means caregiver retention must be an imperative too. Thoughtful scheduling and of course **caring for your caregivers** to ensure they feel like valued members of the team goes a long way in delivering an ideal client experience, while also preserving continued cashflow for the business.

COVID-19 has also taught us the importance of pivoting to expand or modify your service offerings as needed, from remote visit check-ins to grocery delivery. It's opened up important considerations about meeting clients where they're at, and determining what needs might need to be filled, and adapting to fill them with out-of-the-box thinking.

KEY QUESTIONS



- ✓ What are you doing to retain employees and adapt to the needs of your clients?
- ✓ Do you have a dedicated customer experience manager?
- ✓ Do your strategies to stay adaptive to clients also foster better caregiver retention?
- ✓ In what ways do you engage clients in co-designing elements of your service?
- ✓ How do you check in with your clients during challenging times?



STEP 7:

Leverage technology

Home care has been going through an important evolution over the past several years as technological advances have enabled far more touchpoints with clients – and in turn, opportunities to elevate the client experience.

Advanced tools such as remote **patient monitoring** and wearable technologies not only provide a seamless and safe option to monitor your clients' health and vitals, but can also generate valuable data to bolster the client experience. Telehealth and the increasing importance of being able to access data across the continuum of care helps clients feel empowered to understand and make informed decisions about their care while uniting the sometimes disparate members of their overall care team.

From an experience perspective, having access to a **family portal and video conferencing** with loved ones and care providers provides an unmatched experience that allows everyone to connect and align on priorities.



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Meanwhile, technology can keep staff accountable and ensure quality care. One of the most common complaints received in the home care industry is late and/or missed visits. Implementing a home care software solution that includes **electronic visit verification** and real-time updates can ensure that your providers clock in and out of their visits as scheduled. These tools enable data-driven support, allowing your care providers to make faster, more informed decisions in the field, which can greatly improve clients' overall experience.

Most home care software solutions today have the ability to capture large amounts of data. With electronic notes and **clinical documentation**, it's possible to have full transparency into how your employees are performing with valuable feedback from your clients.

KEY QUESTIONS



- ✓ Are you choosing a software vendor or partner?
- ✓ Is your current system set up to capture the data you need?
- ✓ Does your technology have the capacity to make your client's life easier?
- ✓ Do you offer modern technology options like portals and video conferencing?
- ✓ Do you have a reliable EVV system?



STEP 8:

Use your data

You've got data coming in from many sources, whether it is flowing from client feedback or through modern technology solutions. Still, data is not meaningful unless it is acted upon. Understanding its sources, and then figuring out the trends it reveals, enables you to take a holistic view of your agency to ensure everyone and everything is looked after – beginning with clients.

Home care software today should have the ability to capture metrics and build data reports. Begin by getting a handle on the outcomes you want, as effective data analysis requires deciding which questions you need evidence-based answers to. All the intel you collect from surveys and other feedback mechanisms will point the way toward the most pressing question marks.

Equipped with data reports, it's possible to make confident decisions even in changing circumstances. These reports can help you focus on the value you bring to clients, ensuring the priorities expressed by your clients are consistently met, that risk is adequately managed, that transparency is maintained, and service is customized for each client. **Check out AlayaCare's list of 17 such reports here.**

Key to this important effort is to cue up actionable insights. When you conceive of data-driven solutions, make sure what you uncover can be implemented. The path to action should be fairly clear from the get-go.

KEY QUESTIONS



- ✓ How will you use your data to make informed decisions?
- ✓ What are your next steps with utilizing your data?



Over to you

The client experience is a critical component of running a successful care organization that can have a major impact on your consumer perception, and revenue.

Follow these tips and techniques to ensure your clients are always in focus and you'll find yourself with a loyal audience that recognizes your organization above competitors, chooses your services time and time again, and recommends their friends and family do the same.

On behalf of both AlayaCare and Home Care Pulse, we are happy to continue the discussion and provide more insight into how technology can improve the client experience.



AlayaCare offers a platform for agencies to propel towards innovation and home care of the future.

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Home Care Pulse provides solutions to help you close the feedback loop and boost caregiver engagement.

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